June 2021

Evaluation of the Cultural Destinations Fund (Phase 2)

Final Evaluation Report

SQW

Background and context

The Cultural Destinations Fund programme set out to maximise culture's contribution to the local visitor economy in more places through supporting cross-sector partnerships in local areas. The second phase of the programme invested £4.2 million between April 2017 and January 2021 to support eighteen consortiums of local partners (including at least one cultural organisation and a Destination Management Organisation) to build on culture's potential to help grow the local visitor economy.

The cultural and the tourism sectors are each, in their own right, significant contributors to local economies. Data from the Department for Digital, Culture, Media and Sport (DCMS) valued the arts and culture industry in 2016 as responsible for £10.8 billion in Gross Value Added (GVA), supporting over 137,000 jobs.[1] Tourism has a significant and growing role in the British economy, and in 2017 contributed £106 billion (GDP) and supported 2.6 million jobs[2].

Culture is closely intertwined with tourism and both sectors form part of the visitor economy. The cultural sector is already making a major contribution to the visitor economy; £4.5 billion of spending by inbound visitors, more than 25% of annual spending by international visitors, is attributable to the UK's culture and heritage sectors.[3] Cultural destinations are attractive to domestic and international visitors and in 2019, 18 of the top 25 most visited attractions in the UK were in the cultural sector[4].

About this report

The Cultural Destinations Fund was a programme to support local areas to maximise their economic and cultural potential by bringing together cultural and tourist organisations. SQW evaluated the first round of the programme in 2017.[5] This report presents the evaluation findings of the second phase of the programme, which was undertaken in 2020/21. It sets out the key findings against the programme objectives and includes key learning and recommendations for local leaders and project managers, and for Arts Council England, Visit England and visitor economy policy makers. Note that a summary report and four case studies of 'the use of digital', 'resilience', 'continued participation' and 'private sector partnerships' are available on Arts Council England's website.

The evaluation research and the report were undertaken during the COVID-19 pandemic. The pandemic did not have a significant impact on project delivery, as this was largely complete when the outbreak occurred. However, its containment measures including closures and lockdowns will impact the achievement of longer-term and sustained outcomes. This report should be read in this context. Moreover, the learning and recommendations generated from the evaluation could be considered in the context of supporting the recovery of both the culture and tourism sectors.

[1] Cebr (2019) Economic impact of arts and culture on the national economy, Arts Council England
[2] VisitEngland/VisitBritain (2017) Tourism in England. https://www.visitbritain.org/value-tourism-england
[3] HM Government (2019) Industrial strategy: Tourism sector deal https://www.gov.uk/government/publications/tourism-sector-deal
[4] Association of Leading Visitor Attractions (2019) https://www.alva.org.uk/details.cfm?p=423
[5] SQW (2017) Evaluation of Cultural Destinations. https://www.artscouncil.org.uk/cultural-destinations#section-5

Contents

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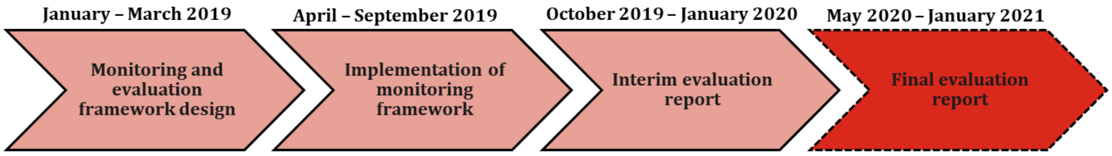
1. Introduction

1.1 In January 2019, Arts Council England and Visit England (VE) commissioned SQW to undertake an evaluation of the second phase of the Cultural Destinations Fund, delivered between April 2017 and January 2021. The evaluation began in January 2019 (see Figure 1-1). In June 2019, an evaluation plan was completed which was based upon a period of scoping with projects and the development of monitoring and evaluation tools. An Interim Evaluation Report was delivered in January 2020.

Figure 1-1: Cultural Destinations Fund Phase 2 Evaluation



Source: SQW

1.2 This is the final evaluation report, which presents the evidence gathered over the evaluation period. This includes the findings from the final evaluation research which was undertaken between June and November 2020.

1.3 The **purpose of the final evaluation** is to:

- assess the extent to which the programme has delivered on the anticipated outputs and outcomes
- assess whether the programme has met its overall aims
- summarise the key learning for how best to develop culture's contribution to tourism.

Programme overview of Cultural Destinations Fund phase 2

1.4 The **Cultural Destinations Fund phase 2 is a £4.2m programme that was delivered**, in partnership, **by Arts Council England and Visit England**. The programme was funded and managed by Arts Council England and Visit England provided other forms of support, including advice on programme design, joint advocacy and alignment with tourism sector priorities. Visit England and Arts Council England also worked to create opportunities for Cultural Destinations to align with the Discover England Fund. This partnership ensured that there was a dialogue between the arts and culture and tourism sectors at a national, strategic level, to build shared objectives and work towards mutually beneficial programmes of activity.

1.5 The programme aimed to support the positioning of culture as a prominent part of the local visitor offer to drive the growth of the visitor economy, and to build partnership capacity in the cultural and tourism sectors; to achieve the following outcomes[6]:

- **more and different types of people experience the arts and culture** in local destinations in a way that contributes to the growth of the local visitor economy
- **increased income leading to greater sustainability and resilience for cultural organisations** and tourism businesses in local destinations
- **repositioning of culture as a prominent part of the visitor offer** and local economic growth plans
- a **commitment from public and private sector partners to continue working in partnership** to support the growth of the local visitor economy through cultural tourism beyond the life of the Cultural Destinations Fund programme.

1.6 **Eighteen projects** (consortiums) across England **were awarded grants between £128k and £500k**. Eight of these projects are continuations from phase 1 of the Cultural Destinations Fund programme, which ran from April 2014 to March 2017. Timing and duration of projects varied between the eighteen projects:

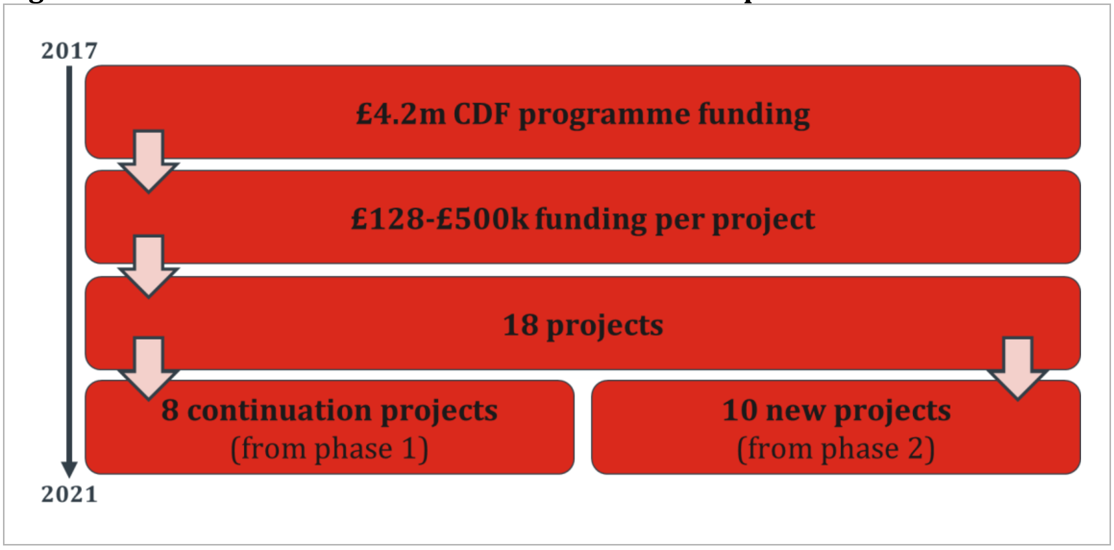
- the majority commenced delivery in April 2017 with three projects commencing in early 2018
- six projects completed delivery in March 2019 or earlier, before the start of programme-level evaluation research
- eleven projects were due to complete by March 2020, and one project was due to complete by January 2021.

1.7 Note that, due to the COVID-19 outbreak, three projects were extended; of two projects which were due to complete in March 2020 one was completed in November 2020 and another will complete in September 2021, and one project which was due to complete January 2021 will complete in June 2021.

1.8 Two of the projects are also in receipt of funding from Visit England's Discover England Fund (DEF) (England's Creative Coast; led by Visit Kent, and Birmingham, led by the West Midlands Growth Company). An overview of the Cultural Destinations Fund phase 2 programme is set out in Figure 1-2:.

[6] The four programme aims for phase 2 have remained the same as phase 1.

Figure 1-2: Overview of the Cultural Destinations Fund phase 2



Source: SQW

1.9 **Each partnership involved a lead cultural body and a Destination Management Organisation** (DMO), and they were tasked with devising a project to help strengthen the links between culture and tourism in the local area. The forms these projects took varied widely from place to place and reflected local circumstances and perceived need. For example, *England's Creative Coast* encouraged visitors to travel to and between art galleries along the South East coast using Geocaching, whereas *Pedalling Culture* in Milton Keynes capitalised on existing local activities, in this case, cycling, to encourage visitors to cycle to cultural organisations.

A changing policy context

1.10 Since phase one of the programme started in 2017, there have been a number of **national policy developments** which have had implications for both the cultural sector and the tourism sector. This includes the **Industrial Strategy,** and the **Sector Deals** outlined within the strategy, and the **Cultural Cities Enquiry**. From March 2020 onwards, the cultural and tourism sectors were also significantly affected by the **impact of the COVID-19 outbreak**. This also had implications for the achievement of programme outcomes and, in some areas, project delivery. The following national policy responses are important to note.

The Industrial Strategy and Sector Deals

1.11 In 2017, the Department for Business, Energy and Industrial Strategy (BEIS) published the Industrial Strategy green paper[7], which sets out the government's long-term plan to strengthen the UK economy. The Industrial Strategy outlined plans for ten Sector Deals, which will deliver partnerships between government and industry to address sector specific issues and create opportunities to deliver increased productivity, employment,

[7] HM Government, 2017, *Building our Industrial Strategy*

innovation, and skills. **'Creative Industries' and 'Tourism' were listed as two of the ten Sector Deals**.

Creative Industries Sector Deal

1.12 In 2018, a Creative Industries Sector Deal[8] was agreed between government and the Creative Industries Council (CIC). The Sector Deal recognises the role of the wider industry, including arts and culture, and its contribution to the UK economy. The Deal sets out plans to invest more than £150 million across the wider creative industries sector. The **key aspects of the Deal for the cultural sector** were:

- '**Ideas**' - joint investment of £80m in an Arts and Humanities Research Council programme, the 'Creative Industries Clusters Programme' to deliver nine Research and Development partnerships between universities and creative businesses across the UK to respond to challenges identified by the creative industries, and an independent Policy and Research Centre led by Nesta[9].
- **'People**' – to increase the supply and diversity of skills and talent in the creative industries, the Creative Careers Programme was designed to support an industry-led creative careers programme for two years, as well as industry development of apprenticeship standards. In the first fifteen months of delivery, this enabled 113,000 young people to engage directly with employers through school speakers, work experience weeks and employer-led immersive events, supported by more than 1,000 creative sector employers.[10]
- **'Places'** – to support creative centres across the country to enable clusters of businesses to increase GVA and employment. A commitment of £20m over two years was made to roll out a Cultural Development Fund and five towns and cities outside of London (Grimsby, the Kent Thames Estuary, Plymouth, Wakefield and Worcester) successfully competed for investment in culture and creative industries, with industry contributing funding, networks and leadership.[11]

1.13 As part of the Sector Deal, the Creative Industries Trade and Investment Board (CITIB) was established in 2018. The aim of the Board is to elevate industry leadership and ownership of the trade and investment strategy. The Board established two main targets: increasing creative industries goods and services exports by 50 per cent by 2023; and significantly increasing the number of creative businesses exporting. In June 2019, The CITIB published a three-year export strategy (International Strategy for the UK Creative Industries[12]) which sets out how the Board aims to work with Government to meet the targets, and the actions required to achieve this.

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[8] HM Government, 2018, *Industrial Strategy: Creative Industries Sector Deal*
[9] Arts and Humanities Research Council, 2020, *Creative Industries Clusters Programme*
[10] Creative & Cultural Skills, 2020, *Creative Careers Programme*
[11] Arts Council England, 2019, 'Shaping Places'
[12] CITIB, 2019, *International Strategy for the UK Creative Industries*

Tourism Sector Deal

1.14 The Tourism Sector Deal[13] was announced by Government in June 2019. The Sector Deal aims to attract more domestic and overseas visitors, and to help drive economic growth.[14] **The key aspects of the deal** were:

- '**Ideas**' - industry and the British Tourist Authority[15] will work together to create an independent Tourism Data Hub which aims to help the sector better understand visitor preferences in real time.
- '**People**' - industry will create an additional 10,000 apprenticeship 'starts' a year by 2025, deliver a £1 million recruitment and retention programme, increase in-work training and mentorships, and work with government on the development and implementation of new T-Levels.
- '**Infrastructure**' - industry will continue to invest in accommodation - developing an additional 130,000 bedrooms by 2025 - and attractions and innovative products. Government will make travel to and around the UK easier for tourists with the development of its Maritime and Aviation Strategies as well as a number of policy developments. Industry will work with government to make the UK the most accessible tourism destination in Europe by 2025 and increase the number of international disabled visitors by a third.
- **'Places'** – up to five new Tourism Zones will be piloted, supported by central government and a biddable funding process, to drive visitor numbers across the country, extend the season, and to tackle local barriers to tourism growth.
- '**Business environment**' - a Business Events Action Plan 2019-25 was launched to aim to make the UK the leading destination for business events in Europe.[16]

Cultural Cities Enquiry

1.15 In February 2019, the **Cultural Cities Enquiry published a report[17] that outlined key recommendations to support UK cities to prosper through investment in culture**. The enquiry was independently chaired by Virgin Money CEO Dame Jayne-Anne Gadhia, and brought together the Core Cities group, Key Cities group, London Councils, the Arts Councils from across the UK and various leaders from the cultural, education, hospitality and business sectors. This intended to stimulate partnership working between different sectors (including tourism) to boost culture's potential to support thriving places and local social and economic development.

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[13] HM Government, 2019, *Industrial Strategy: Tourism Sector Deal*
[14] VisitEngland/VisitBritain, *A Sector Deal for UK tourism.* Accessed April 2018, available at: https://www.visitbritain.org/sector-deal-uk-tourism
[15] The British Tourist Authority is the national tourist agency, responsible for marketing Britain worldwide and developing Britain's visitor economy.
[16] DCMS, 2019, *The UK Government's International Business Events Action Plan*
[17] Cultural Cities Enquiry, 2019, *Cultural Cities Enquiry: Enriching UK cities through smart investment in culture*

1.16 **The Enquiry presented eight recommendations** under four key themes; leadership, investment (including enterprise development and fiscal measures), talent (ensuring diversity and providing talent pathways), and place (focusing on property asset management). The establishment of Cultural Compacts, with financial support from national governments, local authorities and Arts Councils, was recommended as a process to implement the recommendations in different cities, and tourism was highlighted as having an important role to play within these strategic partnerships. Enterprise development partnerships would play a part to establish and enhance collaborative networks of cultural organisations to share professional expertise and support joint investment in shared infrastructure.

1.17 Since the report was published, trailblazing activity to **establish Cultural Compacts** has commenced. Arts Council England worked with the Core Cities group and the Key Cities group to identify a number of early adopters.. Since then, several more cities and towns have formed a Cultural Compact[18], including places that have participated in the Cultural Destinations Fund programme, such as Birmingham, Nottingham, Coventry, Sheffield and Wakefield.

The COVID-19 pandemic and policy response

1.18 In March 2020, the UK Government announced a national lockdown in response to the COVID-19 outbreak and global pandemic. This resulted in various restrictions to travel and the closure of UK businesses and organisations. A survey conducted by ONS, the Business Impact of Coronavirus (COVID-19) Survey, estimated that 75% of staff in the Arts, Entertainment and Recreation industry were furloughed in May 2020 (the second largest proportion below Accommodation and Food Service Activities); this remained high at 55.1% in July 2020 becoming the industry with the highest proportion of staff on furlough.[19] Subsequent economic restrictions and lockdowns were put in place at a local level and a national level throughout 2020 and in to 2021.

1.19 In response to the associated economic issues, the UK Government announced a package of financial support for businesses and workers affected, including the Job Retention Scheme, business loans and grants for the self-employed. In addition to national support available, sector specific support was provided by the government for the tourism and cultural sectors, in recognition of the significant impact the COVID-19 restrictions have had and will continue to have on these sectors. The sector specific support comprises:

- For the tourism sector, Visit England has created a £1.3m COVID-19 Destination Management Organisation (DMO) Resilience Fund that supported capacity in DMOs to engage and communicate with tourism businesses in the early stages of the pandemic. Subsequently, a £1m DMO Emergency Financial Assistance Fund has been opened to cover emergency financial assistance to those at acute risk of closure, covering 1st October 2020 to 31st March 2021. Additionally, a £10m Kick-Starting

[18] A full list of projects can be found here: Review of the Cultural Compacts Initiative | Arts Council England
[19] Office for National Statistics, 2020, 'Comparison of furloughed jobs data: May to July 2020'

Tourism Package aimed to support small businesses in tourist destinations with grants up to £5k to adapt their businesses in summer 2020.

- For the cultural sector, a £160m Emergency Response Fund was announced by Arts Council England in March 2020 to support individuals and organisations across the culture sector in response to the COVID-19 outbreak. The package consisted of: £90m for National Portfolio Organisations (NPOs) and Creative People and Places (CPPs) lead organisations; £50m for organisations outside of the National Portfolio; and £20m to creative practitioners and cultural workers. In July 2020, a £1.57bn Culture Recovery Fund was announced by the Department for Digital, Culture, Media and Sport (DCMS) to support cultural and heritage organisations through grants, repayable finance and capital investments. An additional £300m was committed to the Culture Recovery Fund in the March 2021 budget.

1.20 However, these policy interventions will not support all culture and tourism organisations, as overall funding is limited, and organisations have to meet eligibility criteria. Additionally, ongoing impact is likely to affect organisations differently – certain sub-sectors may find adaptation and recovery more or less difficult due to their nature and changing local restrictions will affect regions differently around the country.

Implications for the Cultural Destinations Fund phase 2 evaluation

1.21 The delivery of most elements of the Sector Deals and the recommendations from the Cultural Cities Enquiry remains at a relatively early stage, and thus it is not anticipated that there will be a significant tangible impact on the activities and outcomes of the Cultural Destinations Fund programme at this point. However, **the findings from this final evaluation should be considered in this wider, evolving policy context**, in which the role and value of culture and tourism in delivering economic growth is being recognised at a national level.

1.22 Clearly the COVID-19 pandemic has had and will have a significant impact on the longer-term outcomes of the Cultural Destinations Fund programme (phase 2). While the majority of projects had completed delivery by March 2020, three projects continued delivery post-March 2020 and therefore the COVID-19 pandemic also impacted on project delivery for these three areas. To account for the likely impacts of the COVID-19 outbreak, the evaluation has focused on:

- collecting evidence of progress made by the projects prior to March 2020 and any subsequent impacts, where relevant
- the outcomes that were anticipated by the projects, and whether those outcomes are expected to be realised in the future.

1.23 The evaluation findings set out in this report are presented in a notably different context to what was anticipated when the Evaluation Plan for the Cultural Destinations Fund programme was developed in March 2019. As set out above, continued government restrictions in response to the evolving COVID-19 pandemic has meant that both the cultural and tourism sectors have been either effectively shut down or unable to operate as normal. The full impact of the pandemic on the sectors is not yet known, this is likely to be determined by when and how the sectors can begin recovery activities. While the findings of this evaluation do not explicitly relate to the COVID-19 outbreak, they should be considered in the context of sector recovery, particularly as areas of key learning that could inform recovery activities.

Cultural Destinations Fund phase 2 evaluation

Evaluation approach

1.24 SQW was commissioned by Arts Council England and Visit England to deliver a **programme-level evaluation** of the Cultural Destinations Fund phase 2.[20] To this end, **a national framework has been developed** which sets out the key aims and outcomes that the programme is expected to deliver, and indicators and measures to assess progress against those aims. The national framework was informed by the programme logic model[21], which was agreed with Arts Council England and Visit England in the evaluation plan and is set out in Annex A.

1.25 The evaluation brief posed **three core research questions**:

- How and **to what extent has the** Cultural Destinations Fund **programme met its** overarching **aims**?
- **What have been the main barriers and enablers to change** that realises the programme aims across the Cultural Destinations areas?
- **What lessons can be learnt** for how best to develop culture's contribution to tourism for key stakeholders?

Methodology

1.26 To answer the core research questions, the overall evaluation approach, which has been delivered over two years, incorporated four broad aspects:

1) **Collection and analysis of monitoring data** from live projects: a monitoring framework was developed and implemented in summer 2019, based on the programme logic model. Projects, that were live after March 2019, were asked to

[20] Many of the projects have delivered or commissioned their own evaluation, in addition to providing project completion reports for ACE and VE.
[21] The logic model is based on the programme information provided by ACE and VE, and the project level information provided by projects, including bid application forms and evaluation plans, and discussions held by SQW with projects.

submit monitoring data in September 2019, to inform the interim evaluation, and in June 2020 to inform the final evaluation.

2) **Consultations with project leads:** 16 semi-structured interviews were undertaken with projects leads for each area (including live and completed projects)[22] – the consultations for the final evaluation took place in summer 2020.

3) **Meta-analysis of evidence and learning from projects' evaluation and final reports**: it was not possible to collect monitoring data for six projects where delivery was completed. Existing evidence in the form of evaluation reports and summary reports were reviewed for any evidence that would address the evaluation questions. In the final evaluation, project documents and evaluation reports were reviewed from 17 projects.[23]

4) **E-survey of local stakeholders:** as part of the final evaluation, an e-survey was sent to a range of local stakeholders from all projects in September 2020; 59 stakeholders responded from 15 projects, representing the cultural (39 respondents) and tourism sectors (11 respondents) and economic development organisations (fewer than 5 respondents). More information regarding the methodology can be found in Annex E.

1.27 Based on the consultation evidence, four case studies have also been developed which focus on the key themes that emerged from the interim evaluation and were agreed with Arts Council England as particular areas of interest. The themes were:

- Working with private sector partners
- The impact of longer-term participation
- Resilience of cultural organisations
- The use of digital in project delivery.

1.28 The cases studies summaries are presented within the main report. The full case studies can be found on the Arts Council England website.

Gaps in the evidence

1.29 The evidence set out in this final evaluation report includes:

- output data, drawing on monitoring data from the live projects (11)[24], and a document review of all the Cultural Destinations Fund projects (18)
- outcome data, drawing on consultations with project leads (16), a document review of the completed and live projects (18), and the e-survey findings.

[22] Two projects were unable to participate in a consultation.
[23] One project did not provide programme documentation.
[24] One live project was unable to provide monitoring data.

1.30 The **quality of the output data from the live and completed projects is variable**. This is for two reasons:

- the outputs set out in the monitoring data have not been reported on by all of the live projects; this is as some outputs are not applicable to all projects, and also it has not been possible for some projects to report on certain outputs (e.g. visitor numbers)
- the information set out in the documents for the completed projects does not directly align with the output measures developed in the evaluation framework, and therefore they cannot be aggregated with the data from live projects.

1.31 As a result, while aggregate data is reported on for the live projects, this is not comprehensive across the programme, and **it is not possible to provide outputs at a programme level**.

1.32 For the most part, project outputs and outcomes have been captured at some level through the monitoring data and/or the consultations with the project leads. However, in the final evaluation it is apparent that, while projects have been able to report on outputs, many have **found it challenging to report on visitor outcomes and visitor behaviour**, and to attribute any changes in outcomes to their project. Further information regarding this is set out in Section 4.

1.33 In any future programmes, it is recommended that evaluation requirements are built into monitoring and reporting from the outset. This would be aided by implementing a programme-level evaluation at the start of the programme, to ensure that projects have a clear understanding about the evidence they are expected to collect and report to feed into the wider evaluation.

Report structure

1.34 The remainder of the report is structured as follows:

- Section 2: The Cultural Destinations Fund programme
- Section 3: Delivery of programme outputs
- Section 4: Changes to cultural visitors
- Section 5: Increased sustainability and resilience of cultural organisations
- Section 6: Culture as a prominent part of the local economy
- Section 7: Sustained public and private sector partnership working
- Section 8: Summary and key learning

1.35 There are seven supporting annexes:

- Annex A: Cultural Destinations Fund Logic model

- Annex B: Projects' evaluation plans
- Annex C: Project document list
- Annex D: Project level monitoring data
- Annex E: Evidence of changes in visitor behaviour
- Annex F: E-survey methodology and results
- Annex G: List of consultees

2. The Cultural Destinations Fund Programme

Overview of Cultural Destinations Fund projects

2.1 Eighteen projects received Cultural Destinations Fund (2017-2021) funding, eight of which are a continuation from phase 1, delivered from 2014 to 2017 (see Table 2-2). The majority of projects commenced phase 2 delivery in April 2017 (except for Bristol and Bath Cultural Destinations and England's Creative Coast, which commenced in January 2018, and Birmingham which commenced in May 2018). As shown in Table 2-1, the **duration of project delivery differs quite substantially** across the projects:

- two projects delivered for 15 to 20 months
- six projects delivered between 21 and 30 months
- seven projects delivered between 31 and 40 months
- three projects delivered for 41 months or more (note that these projects received an extension to project delivery, due to the COVID-19 pandemic).

Table 2-1: Project delivery duration (Phase 2)

Project duration	Number of projects	Number of phase 1 projects
15 to 20 months	2	2
21 to 30 months	6	4
31 to 40 months	7	1
41 months or more	3	1

Source: SQW

2.2 The **projects are both geographically dispersed**, delivering in the North of England in Kendal, to the South West of England in the Isles of Scilly, **and geographically diverse** including rural, coastal, metropolitan and urban destinations.

Figure 2-1: Map of Cultural Destinations Fund projects

Source: Produced by SQW 2018. Licence 100030994

2.3 The evaluation commenced in 2019 and at this time, six projects had or were due to complete imminently. As a result, these projects were considered differently in the evaluation, as it would not be possible to monitor outputs or ongoing progress. These **six projects, which completed delivery in March 2019 or earlier, are classed as 'completed'**. The **remaining twelve projects were considered in the evaluation as 'live'** – although, at the time of reporting for the final evaluation, the majority of these projects have finished (with the exception of two). The projects' status, their start/end date and financial information, is set out in Table 2-2 below.

2.4 Most projects are working with a wide range of cultural and tourism partners. Some partners are directly involved in project delivery (i.e. they have developed a product), whereas others hold a wider stakeholder, advisory role. **All projects have received match funding from the public and private sector**, ranging from £5k match funding (Creative Kernow), to £3.55m match funding (Birmingham, which includes Discover England Fund funding).

Project activities

2.5 While all 18 projects share the aims and objectives of the programme, the aims are achieved via different priorities and activities. This reflects the **variation in projects which have different starting points**, depending on the area's existing cultural and tourism assets and the geographical context.

2.6 The activities of **some projects are focused primarily on developing and increasing the local cultural offer** by producing new itineraries to attract visitors or to prolong or diversify the visitor experience. The use of digital has been a central feature in this and has been used in various ways, including the implementation of new booking systems and using digital products to create or enhance cultural experiences. Further information regarding the use of digital is set out in a full case study published on Arts Council England's website.

2.7 For other projects (which already have a strong cultural offer), **the focus is on promoting their cultural offer and marketing it in a different way**. Naturally, the majority of projects include some element of marketing and promotional activities, such as familiarisation trips and campaigns, with a view to attracting visitors from wider regions or international visitors. However, some projects also have a key focus on attracting local visitors and changing the local perception of culture.

2.8 **Developing partnerships between culture and tourism organisations** and finding ways to sustain this is a common theme across all the projects. This includes engaging both public and private sector organisations and businesses and arranging or attending strategic meetings. One of the aims of developing partnerships is to promote a mutual understanding of culture and tourism in the sectors.

2.9 **Skills enhancement and training** is an activity delivered by most projects; the training has been delivered primarily to cultural organisations with a view to raising awareness in the sector of culture's role in the visitor economy, and to promote increased understanding of how cultural organisations can contribute to and benefit from this. A key aspect of the training has also included digital skills, with the aim of upskilling cultural organisations and increasing their knowledge and utilisation of digital infrastructure to improve service delivery (e.g. using online booking systems and promoting events through social media).

Project evaluation plans

2.10 **Thirteen projects have undertaken a local evaluation internally or have commissioned an external provider to deliver this** (such as the Audience Agency or a local university), the remainder undertook some elements of research but did not commit to a full formal evaluation. A summary of this is set out in Annex B.

2.11 Local evaluation material, including interim and final reports[25], have been reviewed as part of this programme evaluation; initially, to inform the development of the Cultural Destinations Fund evaluation framework and, subsequently, to inform the findings of the interim and final evaluation reports. The documents reviewed are listed in Annex C.

[25] Due to the timeframe for project delivery, several projects completed their final evaluation report by December 2019.

Table 2-2: Cultural Destinations Fund projects; timing and financial value

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
Birmingham	The project sought to promote arts and cultural packages to a wide audience through the travel industry. By promoting world-class international events to national and international visitors it aimed to improve perceptions of the region, build economic resilience for artists and cultural organisations and long-term partnerships between the visitor economy and cultural sectors.	May 2018	March 2020	Live	New	£500,000	£3.55m cash match, income or 'in kind', including from West Midlands Trains, Telford and Wrekin Council, WMCA, partners. (This project has also been a recipient of £1.3m Discover England Fund funding from Visit England.)
Cheshire East Council	Organisations in Cheshire East and Warrington created a more joined-up approach to promoting the area's cultural offer. The existing offer was re-packaged and promoted under a science and nature theme.	April 2017	March 2020	Live	New	£300,000	£26k partner match from Cheshire West and Chester, Cheshire East and Marketing Cheshire £85.7k in-kind partner support
Creative Kernow (Cornwall)	Cornwall 365 - a consortium of leading cultural and tourism organisations, led	April 2017	December 2018	Completed	Continuation	£150,000	£5k LEP funding

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
	by Creative Kernow, aimed to develop the area's dynamic artistic and tourism sectors by supporting young people to be cultural ambassadors, building a distinctive events programme, and creating a new travel app for Cornwall.						
Coventry City of Culture	This project aimed to make the most of the city's arts and cultural offer through tailored packages for tourists and a coordinated city-wide approach to programming and marketing.	April 2017	March 2020 (extended from July 2019)	Live	New	£200,000	£80k match from a range of sources including BBC, private sector, and the LEP.
England's Creative Coast (Kent)	Building on the success of the Culture Kent Cultural Destinations project, Turner Contemporary led a consortium of cultural and tourism partners across Kent, East and West Sussex to create an innovative new travel experience The funding supported new outdoor art commissions	January 2018	June 2021 (extended from January 2021)	Live	Continuation	£500,000	Total of £428k match including: £15k sponsorship from Southeastern Trains £19k from Local Authority partners – Kent, East Sussex and Essex County Councils, Historic Dockyard Chatham, Southend Borough Council, SELEP £86.5k from a private investor

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
	across the coastline and community engagement programmes that revealed the unique creative spirit of each place. The project was a joint initiative with Visit Kent as part of the UK Government's Discover England Fund.						(The project has also been a recipient of £314k Discover England Funding from Visit England.)
Halifax Culture Hub	Building on the success of the Calderdale Cultural Destinations project, the newly established Halifax Culture Hub sought to further drive the visitor economy. The funding supported the creation of eight themed travel itineraries, as well as a coordinated approach to marketing. Working with Visit Calderdale the project aimed to develop new, ambitious and diverse cultural experiences for visitors.	April 2017	March 2020	Live	Continuation	£150,000	Total of £253k match including membership subscriptions to Halifax Cultural Hub and Calderdale Council

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
Islands' Partnership (Isles of Scilly)	The Islands' Partnership worked with a local consortium of the Isle of Scilly's artistic and cultural communities to develop a distinctive tourism offer that used digital technology to provide visitors with immersive experiences, giving a boost to the visitor economy after more than a decade of decline.	April 2017	December 2019	Live	New	£147,600	£62k, including £16.4k out of £100k ERDF fund
Lakes Culture (Kendal)	Led by The Brewery in Kendal, the aim was to develop the Lake District as a rural cultural destination. Building on the first phase of their Cultural Destinations project, local arts organisations, public bodies and tourism businesses continued to work together to attract more visitors to the area and build a greater international profile.	April 2017	September 2018	Completed	Continuation	£128,000	£3k from South Lakes District Council £6.6k from Lake District National Park, National Trust and Forestry Commission £26.8k from tourism sector and other private project partners
Lincoln City Centre Partnership	The funding aimed to put arts and culture at the centre of plans to celebrate two	April 2017	March 2019	Completed	Continuation	£150,000	£37.6k matched by Lincoln Business Improvement Group

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
	nationally significant moments in Lincolnshire's rich history: The 800th anniversary of the Charter of the Forest and the Royal Air Force Centenary. These celebrations offered unique opportunities to attract new visitors from England and abroad.						
Look Sideways: East (East Anglia)	Look Sideways:East saw New Anglia Local Enterprise Partnership's Cultural Board and partners work together to grow the cultural visitor economy across Norfolk and Suffolk. The campaign included the creation of a new visitor website that aimed to help increase national awareness of the two counties	April 2017	September 2021 (extended from March 2020)	Live	New	£300,000	Total of £120k match, including £81k from Norfolk and Suffolk County Councils £123k in-kind support
Marketing Manchester	The programme funding aimed to support Marketing Manchester to research, map, plan and develop excursions and itineraries around Greater Manchester,	April 2017	March 2019	Completed	New	£220,000	£270k from steering group partners and DEF project funding

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
	focusing on its rich cultural offer. I aimed also to develop a shared booking system for cultural venues across the city region.						
Nottingham Contemporary	By opening the door to the Derbyshire and Nottinghamshire's hidden cultural treasures alongside new contemporary artworks, The Grand Tour invited tourists to take a short break with a difference. The funding aimed to support the research and development for two new seasons in 2018.	April 2017	March 2019	Completed	Continuation	£150,000	£15k from D2N2 LEP In-kind resources worth £54k
Pedalling Culture (Milton Keynes)	Pedalling Culture aimed to increase cultural tourism in Milton Keynes' by putting culture at the centre of its green transport infrastructure. The project saw the city's cultural venues and spaces made more accessible from Milton	April 2017	November 2019 (extended from March)	Live	New	£300,000	£170.6k from Go ultra low programme.

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
	Keynes' 280 miles of cycling and walking routes.						
Stoke-on-Trent Cultural Destinations Partnership	Led by Stoke-on-Trent City Council, with partners including Visit Stoke and The Potteries Museum and Art Gallery the partnership wanted to attract more visitors. A joined up approach sought to ensure arts and culture can be capitalised upon as part of the city's new Destination Management Plan.	April 2017	April 2020	Live	New	£300,000	Total of £30k match from Stoke City Council
Sheffield Theatres for Sheffield Culture Consortium	Building on the success of their existing Cultural Destinations project, Sheffield Culture Consortium and its partners continued to work together to increase national and international visitors to the city. The project included the commissioning of three local artists of major international significance to make new work, as well as continuing to develop the culture	April 2017	March 2019	Completed	Continuation	£150,000	£20k from Sheffield City Council £57.5k match funding or in-kind contributions from University of Sheffield

Project title	Overall aim(s) of the project	Start	End	Project status (*for evaluation purposes*)	Project type	Funding	Match funding
	website, Our Favourite Places.						
Bristol and Bath Cultural Destinations (West of England)	Building on the successful partnership between Bristol and Bath tourism and the cities' cultural organisations, the new investment saw Spike Island lead a consortium including partners from all four local authorities in the West of England LEP to promote the full richness and diversity of the region to visitors from home and abroad.	January 2018	December 2019	Live	Continuation	£150,000	£55k from Bath and North East Somerset Local Authorities
Wakefield Cultural Consortium (Beam)	Led by Beam, local arts and cultural venues in Wakefield teamed up with tourism businesses and the wider business sector to promote Wakefield as one of Yorkshire's leading cultural destinations. Together they aimed to embed culture within the district's ambitions for economic growth, jobs and improved skills.	April 2017	November 2020 (extended from March 2020)	Live	New	£223,000	Total of £86k match, including: £64k from Wakefield Council £10k other public support and earned income £74k in-kind support contributions from project partners

Project title	**Overall aim(s) of the project**	**Start**	**End**	**Project status** (*for evaluation purposes*)	**Project type**	**Funding**	**Match funding**
Woolwich	Art and culture was at the centre of a new campaign to raise Woolwich's profile. 'Woolwich: creating a new Cultural Destination in London' paired the arrival of the Crossrail service in 2018 with the launch of an arts-led events programme to increase tourism and encourage local pride.	April 2017	March 2020	Live	New	£270,000	£80k match funding from partners, plus in-kind support from partners and funding leveraged from other sources

Source: SQW analysis of project information

3. Delivery of programme outputs

Key findings

- To March 2020, a wide variety of organisations and individuals were engaged in project delivery, including **arts and cultural organisations**, **public bodies**, **and other key stakeholders** in the regions. Across 11 projects, **485 organisations engaged with the programme as partners** by September 2020. **Projects engaged with a further 2,000 businesses/organisations.**
- Activity and methods of delivery across projects varied significantly. Most frequently, projects have conducted market research, developed or commissioned new cultural products, marketed events or the wider local cultural tourism offer, and provided training (primarily to cultural organisations) to build capacity and understanding of the tourism sector (including travel trade requirements and lead-in times) and the local cultural/tourism offer.
- Ten live projects **developed and implemented new cultural products in the market, with** a total of **171 new culture and tourism products having been developed or in development**. **Nine new websites** have been launched which have had over **81,000 visitors and 103,000-page views**.
- All live projects used some form of marketing, advertising or promotional campaigns, **totalling 152 campaigns**. In total, these reached **11.8m people through online and social media channels** and a further **315m people through other forms of publication**.
- **Over 500 organisations benefitted from training sessions** across 10 projects, with **over 1,200 people attending.**

Programme outputs

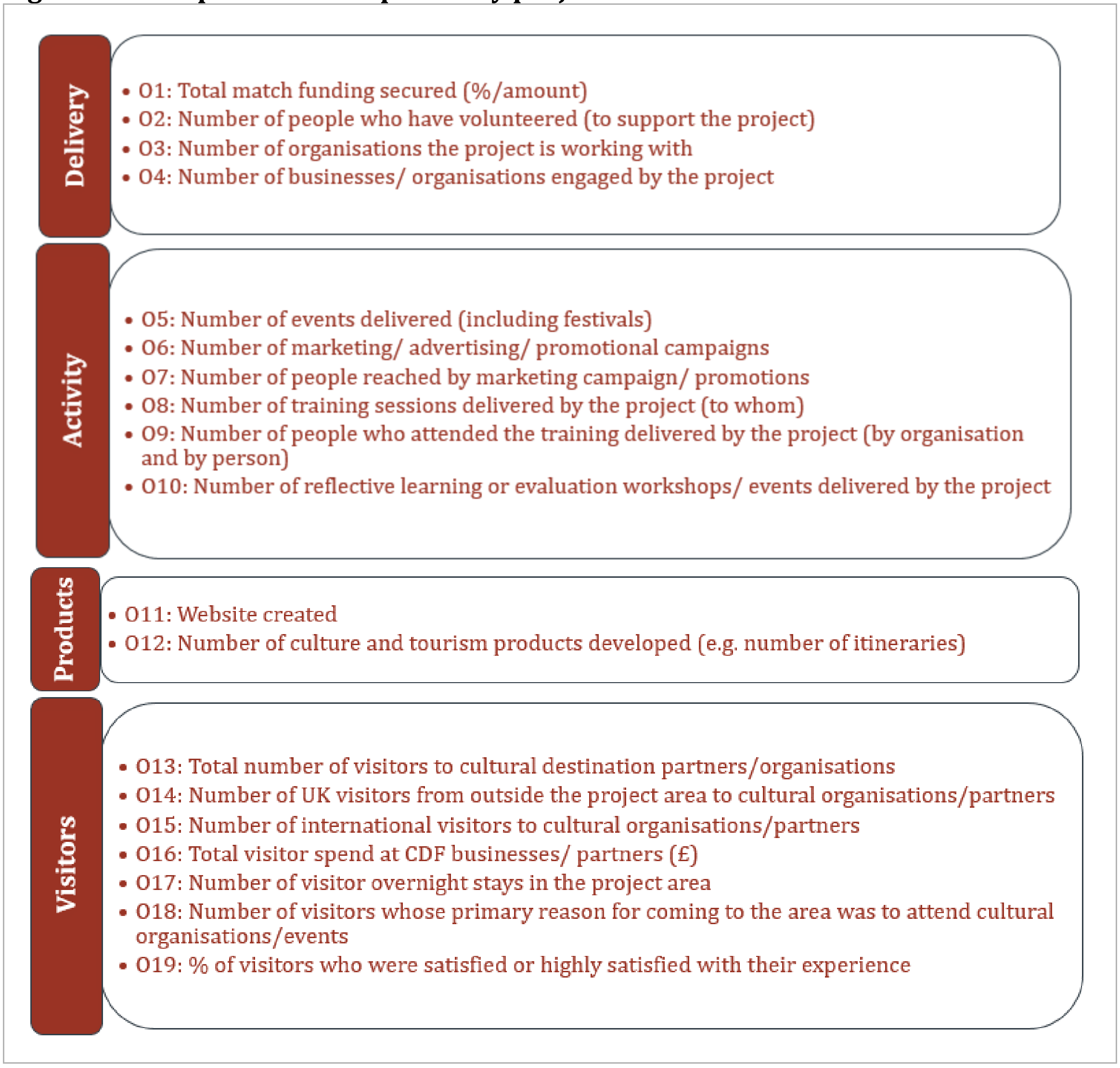
3.1 This section presents outputs at a programme level for all projects, against three themes: **Delivery**, **Activities** and **Products.** This includes information for eleven live projects, and six completed projects.[26]

3.2 A monitoring framework was developed in early 2019 as part of the Cultural Destinations Fund Evaluation Plan. This included 19 metrics that are common across most of the 18

[26] There are 12 live projects in total. However, Pedalling Culture (Milton Keynes) is not included in this analysis as data was not provided.

projects (as identified in the programme logic model as outputs or outcomes), under four themes as shown in Figure 3-1: Delivery, Activities, Products and Visitors.[27]

Figure 3-1: Output metrics reported by projects



Source: SQW

3.3 Live projects, which continued delivery after March 2019, were asked to complete a monitoring workbook and report against those metrics, where relevant.[28] These data were collected twice:

- in September 2020 for the interim report, covering the delivery period from project start to August 2019
- between July and September 2020 for the final report, covering September 2019 to September 2020 (or project end if earlier).

[27] Visitor outcomes are included in the monitoring workbook alongside outputs to capture this information on an annual basis. While visitor outcomes were reported alongside outputs by live projects through the monitoring workbook, these are reported in Section 4.
[28] A project-level breakdown of data at an individual project level as reported against each output is provided in Annex E.

3.4 Completed projects were not asked to complete the monitoring workbook as project delivery had finished before the workbook was implemented.[29]

3.5 Monitoring and evaluation reports/documents were provided to Arts Council England by all projects. This information was reviewed against the outputs in the logic model. For the completed projects, this has informed the analysis of their delivery against outputs which is set out in the rest of this chapter.

3.6 Note that, due to the variety of activity between projects, some outputs were not relevant to all projects, or projects may not have had the mechanisms in place to measure outputs (such as visitor numbers). In addition, while the majority of the eleven projects that submitted monitoring data were expected to be completed in March 2020, three projects were still delivering at the point of data capture and, as such, subsequent outputs may be realised during or after the reporting period.

Live projects

Delivery

3.7 **The 11 live projects had worked with 485 partners,** many of which were new, by September 2020, an increase of 133 organisations since August 2019.

3.8 The type of organisations partnered varied significantly to include arts and cultural organisations (including businesses, charities and not-for-profit organisations), public bodies such as local authorities and Local Enterprise Partnerships (LEPs), and other key stakeholders in the region (artists or influential individuals in the arts, culture or tourism sectors). For some projects, this involved formally agreeing partnerships with large travel trade agencies or other tourism/culture projects (such as Discover England Funded projects) or establishing local consortiums.

3.9 Partnerships were most commonly made locally and regionally according to each projects' geographical scope, but national and international partnerships were also developed (international partnerships were primarily developed by DEF projects). Examples of international partners included large travel trade agencies in France and Holland, or with Airbnb.

[29] Reporting against the live projects is therefore more comprehensive and quantifiable, due to the use of the standardised monitoring tool, while information from completed projects is more difficult to quantify consistently at a programme level.

Table 3-1: Total reported delivery metrics by live projects (from programme start to August 2019 and September 2020)

Metric	Aggregate total reported (2019)	No. of projects reporting (2019)	Aggregate total reported (2020)	No. of projects reporting (2020)	Increase (2019-2020)
01: Total match funding secured	**£1.5m**	11	**£4.7m**[30]	11	£3.2m
02: Number of people who have volunteered (to support the project)	**646**	7	**825**	7	179
03: Number of organisations the project is working with	**352**	11	**485**	11	133
04: Number of businesses/ organisations engaged by the project	**246 public sector**	11	**473 public sector**	11	227
	1,029 private sector	10	**1,527 private sector**	10	498

Source: Monitoring workbooks completed by live projects

3.10 **Projects engaged with 2,000 businesses/organisations in total, made up of 473 public sector organisations** (11 projects) **and 1,527 private sector organisations** (across 10 projects, although two projects – Birmingham and Halifax – represented 72 per cent of this total). **Across seven projects, 825 volunteers were secured to support with activity**. For example, one project engaged volunteers in the delivery of three new festivals, while another engaged residents as volunteers through participative activities, including community casting and a choir.

3.11 Three projects partnered with higher education institutions, schools or local organisations working with young people to engage this demographic; one project offered a 'Young Ambassador' role, work experience projects and engagement with the Enterprise Adviser Network. These projects were all in rural locations (Cornwall, Isles of Scilly and East Anglia).

3.12 **The match funding secured**, as reported by projects, **totalled over £4.7m** (across eleven projects); however, there is a significant outlier in this total, with Birmingham reporting match funding of £3.55m.[31] Excluding this project, on average **match funding represented 33 per cent of the total project cost** (across ten projects).

[30] Note that a significant proportion (76 per cent) of this was reported by the Birmingham project (£3.55m).
[31] A large proportion of the match funding received by Birmingham (80%) was contributed by Telford & Wrekin Council from the English Heritage crowd funding of Iron Bridge.

Activity

Table 3-2: Total reported activity metrics by live projects (from programme start to August 2019 and September 2020)

Metric	Aggregate total reported (2019)	No. of projects reporting (2019)	Aggregate total reported (2020)	No. of projects reporting (2020)	Increase (2019-2020)
O5: Number of events delivered (including festivals)	**391**	8	**2,496**	8	2,105
O6: Number of marketing/ advertising/ promotional campaigns	**104**	11	**152**	11	48
O7: Number of people reached by marketing campaign/ promotions	**5.7m online/ social media**	7	**11.8m online/ social media**	10	6.1m
	296m other forms of publication	7	**315m other forms of publication**	8	19m
O8: Number of training sessions delivered by the project (to whom)	**74 cultural organisations**	10	**137 cultural organisations**	10	63
	118 other recipients	9	**152 other organisations**	9	34
O9: Number of people who attended the training delivered by the project (by organisation and by person)	**428 organisations**	10	**508 organisations**	10	80
	979 people	9	**1,283 people**	9	304
O10: Number of reflective learning or evaluation workshops/ events delivered by the project	**65**	7	**97**	8	32

Source: Monitoring workbooks completed by live projects

3.13 **Activity and methods of delivery across projects varied significantly**. Generally, this centred around:

- cultural and tourism market research
- developing or commissioning new cultural products
- marketing associated with specific events or festivals
- general marketing of the wider local cultural tourism offer

- establishing and developing partnership arrangements.

3.14 **Two projects conducted market research** as part of their project activity to inform further delivery plans, covering perceptions of the region and testing of the developed marketing campaign product. Another two projects conducted digital audits to map partners' online presence, reach, and skills, and take collective actions and implement training based on recommendations.

3.15 **Weekend or week-long events** (in the form of one weekend event targeted at residents and the other activities for school children during half term) **were delivered by two projects**. Other one-off events included outdoor performances, theatre, carnival and music performances. Alongside the development of new products and events, **existing regular events**, such as festivals, **were supported and delivered by projects, or were packaged differently through collaboration between partners**. **In total, 2,496 events have been delivered** by eight projects at time of reporting, including festivals and other audience events delivered by cultural and other partner organisations[32] - this represents a large increase since August 2019, when 391 events were reported to have been delivered.

3.16 **All eleven live projects used some form of marketing, advertising or promotional campaigns, totalling 152 campaigns delivered by September 2020**. These took a variety of forms including press trips, local, regional and national press coverage, attending travel trade events, regular newsletters (online and physically delivered to local households and 'visitor hotspot' areas), influencer and familiarisation trips, and the creation and distribution of a paper calendar of cultural and tourism events in the area. Marketing activity accelerated during the final year of programme delivery, with an additional 48 campaigns being delivered during this time, around a third of the total since the programme start.

3.17 In total, **marketing campaigns and promotions by projects reached 11.8m people** through online and social media channels (across 10 projects) **and a further 315m people through other forms of publication**[33] (across eight projects).

3.18 Projects also provided examples of how **digital outputs had been delivered strategically in partnership with project partners**. This included joining up online marketing campaigns through websites and social media channels and developing joint marketing products, such as films, to be distributed online. Two projects worked with partners to strategically distribute physical marketing material, for example:

- one project partnered with transport providers to place marketing material on the major arteries in and out of city, on buses and at regional rail and bus stations, and at key attractions, accommodation and transport hubs.

[32] This figure is based on projects' self-reported monitoring data. Ninety per cent of these events were reported by Birmingham, who reported multiple events happening at each festival or day-long event. One event they delivered, the Ironbridge Coracle Regatta, was reported to have included 1,500 events, which makes up the majority of this figure.
[33] This figure, self-reported by projects, includes the potential reach of flyers, leaflets and newspaper advertisements, footfall at exhibitions and in relation to outdoor media, video views and any other advertising campaigns.

- flyers were distributed by project partners at a pop up at London St Pancras; they also partnered with Southeastern rail which hosted a dedicated webpage, placed posters on their network and promoted them as the lead story in a digital consumer newsletter.

3.19 Taking a collaborative approach to marketing (digitally and otherwise) was reported to have been beneficial for both audience reach and sales and has led to joint marketing being used again by partners.

3.20 In total, **over 500 organisations benefitted from training sessions** across 10 projects, with **over 1,200 people attending.** The training appears to support two different objectives, with outputs reported under each:

- **building capacity** among cultural organisations **in relation to digital skills and knowledge of tourism/the tourism sector**
  - five projects reported delivering training to partners on the use of digital analytics tracking – one project used Arts Council England's Digital Culture Network[34] to deliver training to all partners which included 271 people from 49 organisations, while another used Visit England's Taking England to the World training programme[35] for 29 participants from 24 different partner organisations[36]
  - ten projects delivered 137 training sessions to cultural organisations (almost double the number of organisations reported in 2019)
- **ensuring customer facing staff and volunteers offer visitors a unique, engaging and culturally informed experience, and have good awareness and knowledge of the local cultural and tourism offer**
  - nine projects delivered 152 training sessions to other organisations, which included volunteers and businesses in tourism or hospitality sectors
  - two projects delivered ambassador training programmes, a customer service training programme and knowledge exchange workshop series.

3.21 Eight projects also delivered 97 reflective learning or evaluation workshops/events with project partners.

[34] Digital Culture Network | Arts Council England
[35] Taking England to the World - an inbound tourism toolkit | VisitBritain
[36] Wakefield Cultural Consortium secured funding from ACE's Digital Culture Network to deliver a comprehensive training package to all partners; England's Creative Coast used Visit England's Taking England to the World training programme, with two workshops organised for partner businesses.

Products

Table 3-3: Total reported products metrics by live projects (from programme start to August 2019 and September 2020)

Metric	Aggregate total reported (2019)	No. of projects reporting (2019)	Aggregate total reported (2020)	No. of projects reporting (2020)	Increase (2019-2020)
O11: Website created	**9 websites launched**	6	**9 websites launched**	6	0
	45k users	5	**81k users**	5	36k
	77k page views	6	**103k page views**	6	26k
O12: Number of culture and tourism products developed (e.g. number of itineraries)	**138**	10	**171**	10	33

Source: Monitoring workbooks completed by live projects

3.22 Of the 11 live projects, **ten included the development and implementation of new cultural products in the market** as part of project activity, which ranged from itineraries/trails, new digital products/apps, and new galleries or exhibitions. **New cultural products**, commissions or events which were developed **were commonly planned in thematic groups or as themed experiences**, or existing events were rebranded under these themes based on the area's unique offer. For example, one project rebranded existing events under three thematic experiences with an overall 'Science meets Nature' theme, based on the area's assets and unique selling point.

3.23 At the time of reporting, across the ten projects that were delivering this type of activity, a total of **171 new culture and tourism products have been developed or are in development**. The most popular were walking or cycling tours, routes, itineraries or trails (five projects), often packaged as accessible by walking or cycling to showcase the area's cultural tourism offer, with opportunities for guides and multiple partners involved in delivery. Poets or artists in residence were used by two projects, and several projects commissioned artists; for example, one project commissioned leading contemporary artists to create seven pieces of artwork to be displayed at cultural venues across the region's coastlines.

3.24 **Five projects used the opportunity to refresh or re-create the brand and visual identity of the project area**; three projects did this by developing a shared language or style guide to communicate their offer and create a clear brand identity, and this was felt likely to be a 'legacy' of these projects. The revised branding also informed digital marketing and, as part of this, **six projects had launched new websites** as part of project activity at the time of reporting:

- nine new websites had been launched across these six projects[37]
- the websites have had over 81,000 users visit the sites (five projects[38]), and over 103,000-page views across six projects.

Completed projects

3.25 **The majority of completed projects** (five out of six) **received funding from the Cultural Destinations Fund phase 1 programme**; one completed project was new to the Cultural Destinations Fund in phase 2. Therefore, most of these projects have built on initial activities and outcomes achieved as part of projects from 2015 to 2017.

3.26 As with live projects, **activity and methods of delivery varied significantly across the six completed projects**. However, as with the live projects, this centred around the development of new cultural products, commissions, events or festivals, marketing campaigns and training.

Delivery

3.27 Although quantifiable information is not available for each of the completed projects, the projects indicated that there was a **'real commitment' to partnerships** during the project lifespan, as demonstrated by the involvement of senior staff in project delivery at board level.

3.28 Project delivery partners varied by project, but generally included the same types of partner organisations as those reported by the live projects (see 3.8).

3.29 Most partnerships had good engagement with local tourism and cultural businesses. For example, two projects established regular networking groups, one for cultural and creative sector professionals to encourage collaboration and raise awareness of opportunities, and the other specifically as a hotel concierge group representing ten hotels to encourage hotels to share cultural information via a wider range of routes.

3.30 However, **challenges with business engagement were reported**. Projects experienced more challenges in engaging businesses in areas where there were:

- capacity limitations in micro-businesses
- high staff turnover in the tourism sector (this meant that communication was a continuous activity)
- geographically dispersed businesses (particularly in rural locations).

3.31 One project illustrated the challenge referring to the difference between the number of partners they had signed up (over 1,000) and the number taking part (84), and the number of those who saw themselves as 'active network members' through attending events, responding to surveys and sharing information, which was 44 per cent.

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[37] Birmingham developed four websites, while the other five projects developed one website each.
[38] Only five of the six projects were able to report website users.

Activity

3.32 **Marketing** the area's cultural tourism offer **was a key element of project activity**. Commonly, projects used forms of marketing such as newsletters, local, regional and national media coverage, leaflets, social media engagement and websites. Other key aspects included:

- commissioning short films and photography (two projects) and PR agencies to deliver campaigns
- marketing through sponsor's channels, or delivering marketing activity as part of the wider region's tourism marketing campaign (explicitly reported by six projects but may have taken place but not captured for other projects)
- developing a common language and narrative to be used for website and marketing materials, to 'influence how [the area] talks about itself' (one project)
- hosting press and media tours as part of their launch event (one project).

3.33 **Digital technology** was used to support or deliver marketing activity; for instance, Marketing Manchester integrated a box office cultural events platform with the Manchester tourism website. This used an Application Programming Interface (API) to significantly increase the number of arts and cultural events listed which in turn increased website views for cultural events and associated social media marketing. A new template for the site (to allow for editorial content alongside listings) also contributed towards the page views increasing to 45,000 between April 2018 and March 2019, compared to 7,500 in the previous period.

3.34 **Training, education or participation sessions were used by four** of the completed **projects**. This aligned with project activity; for example, Lincoln trained 11 new accredited guides, to deliver with their guided itinerary, while Creative Kernow (Cornwall) held 16 skills development sessions with topics ranging from creative writing to content planning. Lakes Culture (Kendal) held a training and networking event[39] for tourism and cultural businesses and organisations which was attended by 84 individuals.

Products

3.35 **Three projects commissioned artists to produce artwork of varying forms** for events; in all cases, this artwork was then displayed at multiple locations and venues across the local area:

- **Lakes Culture (Kendal)** commissioned six pieces of artwork to be displayed at six tourist venues from January to July 2018; each venue had a 'champion' to look after the project and communicate it to visitors and guests.
- **Lincoln City Centre Partnership** commissioned artists to design knights, which were displayed across the city as a 'Knights' Trail'; these were sponsored and could be taken on

[39] The aim of the event was to increase the organisations' understanding of how to use cultural activity as a promotional tool, and the importance of arts and culture in business and tourism

tour (locally or nationally) by their sponsor for a month in April 2017, they were also displayed at London King's Cross train station and were auctioned to local businesses at the end of the event.

- **Nottingham Contemporary** hosted their 'Grand Tour' with artists commissioned to develop an itinerary which spanned Nottingham and Derbyshire via a network of venues that could be travelled to over a long weekend, or a three or four day mid-week package.

3.36 Other products developed included 'signature experiences' and curated art exhibitions or events. For example, Sheffield Theatres for Sheffield Culture Consortium delivered 31 performance or exhibition days across the project and 11 new products or commissions, including two curated events (Phlegm Mausoleum of the Giants and Sheffield Modern exhibition).

Reflections on outputs

3.37 For the first time, quantifiable outputs from a wide range of Cultural Destinations Fund activities have been captured, which demonstrates the considerable amount of activity that has been delivered by projects. These include the number of new partnerships developed, new product development and event delivery, marketing activity and subsequent website users.

3.38 The (self-reported) data also begins to indicate the amount of investment required at a programme level to deliver the scale of desired programme outputs, and demonstrates the amount and the range of sources of match funding that have been secured by cultural destinations projects by providing benchmark cost of intervention data.

3.39 Various challenges were experienced in relation to data collection, including:

- Projects have struggled to capture evidence of outputs related to visitor numbers and demographics robustly. As the outputs demonstrate, most projects have focused on the practical elements of project delivery and ensuring mechanisms are in place to increase visitor numbers over the longer term; implementing new data collection mechanisms to capture evidence on visitor numbers has not necessarily been viewed as a priority. Further information regarding the projects' challenges in collecting visitor data is set out in Section 4.

- Projects had different starting points in terms of their cultural and tourism offer, and the partnership activity related to this, meaning the focus and level of activity has been extremely varied. Additionally, projects received different amounts of funding and some had participated in phase 1, while others had not. Therefore, it is not possible to use outputs to compare and contrast project performance due to the variation between projects' starting points and existing infrastructure, and funding levels.

- The implementation of the monitoring framework part way through delivery has meant that live projects had to adapt existing monitoring/data collection mechanisms (an easier task for some projects than others), and it was not possible to collect data for completed projects. Analysis of outputs has been limited by having quantifiable data for live projects only, making it difficult to quantify the outputs delivered at a programme-level.

3.40 The COVID-19 outbreak has not had a significant impact on the delivery of project outputs, as the majority of projects had finished delivery, or had completed most aspects of delivery, by March 2020. Some project outputs are yet to be realised by the three live projects (such as the delivery of training); however, they are expected to be relatively modest as most project activities were largely complete.

3.41 In many cases, attribution of outputs or assessments of added value cannot be made robustly due to a lack of baseline or comparator data available at the outset of the Cultural Destinations Fund programme. However, most of the outputs delivered relate to new activity which would not have been possible to deliver without funding – particularly the products created (events, itineraries and websites), and the business training delivered. It is difficult to determine the extent to which other outputs, such as engagement of wider organisations and businesses, would have happened, at the same pace or to the same extent, without the programme. This is explored further in relation to partnership outcomes in section 7.

4. Changes to cultural visitors

Key findings

- For projects that have been able to quantify numbers, an increase in visitor numbers has been observed, both to the project areas and to specific cultural attractions. The evidence presented from the consultations indicates a positive direction of travel in relation to visitor numbers and the diversification of visitor demographics to project areas.
- However, the majority of projects have found it difficult to evidence this aim and the overall evidence at a programme level is limited. In addition, a small number of areas did not aim to achieve visitor outcomes through the Cultural Destinations Fund project due to the scale and scope of their project.
- For projects that have evidenced visitor numbers, in several cases, a proportion of the visitor numbers would have been achieved without the Cultural Destinations Fund, as programmed events and festivals in some areas would have taken place. However, the resources provided through the programme is considered to have increased the attendance and visitor numbers at events and organisations and attracted different types of audience that may not have visited otherwise.
- While there is insufficient evidence that the overall programme has contributed to the growth of the local visitor economy, mechanisms have been put in place by projects, through the programme, which could support the achievement of this objective in the future. For example, greater join up and awareness of the visitor offer locally, both from a stakeholder and visitor perspective.

4.1 This section draws on the evaluation evidence to **assess the extent to which the following programme objective has been realised:**

- **More and different types of people experience the arts and culture in local destinations in a way that contributes to the growth of the local visitor economy.**

4.2 Achievement of this objective was measured using a set of outcomes (developed in the programme logic model):

- increased visitor numbers to the project areas or to specific cultural organisations/events
- increased number of visitors from outside the project area, and international visitors
- diversification of the demographic of visitors to the project area, cultural organisations, and/or events
- changes in visitor behaviour, including increased visitor spend, overnight stays, and the number of visitors to the project area whose primary reason was to attend cultural organisations/events.

4.3 This section draws on evidence from the consultations with 16 project leads, and information from the monitoring and evaluation reports (both interim and final) of all 18 Cultural Destinations Fund projects. As such, the **evidence is based primarily on projects' perception** of the outcomes achieved.

Evidence of outcomes

4.4 The data collected on visitor outcomes, as part of the monitoring workbook submitted by live projects (11 projects) is set out in Table 4-1.

Table 4-1: Total reported delivery metrics by live projects (from programme start to August 2019 and September 2020)

Metric	Aggregate total reported (2019)	No. of projects reporting (2019)	Aggregate total reported (2020)	No. of projects reporting (2020)	Increase (2019-2020)
O13: Total number of visitors to cultural destination partners/organisations	19m	8	21m	6	2m
O14: Number of UK visitors from outside the project area to cultural organisations/partners	777k	4	869k	4	92k
O15: Number of international visitors to cultural organisations/partners	553	2	2,272	2	1,719
O16: Total visitor spend at CDF businesses/partners (£)	£125k	1	£10.9m[40]	3	£10.7m
O17: Number of visitor overnight stays in the project area	364k	4	428k	4	64k
O18: Number of visitors whose primary reason for coming to the area was to attend cultural organisations/events	16.4k	1	51.4k	2	35k
O19: % of visitors who were satisfied or highly satisfied with their experience	98%	7	90%	7	-8%

Source: Monitoring workbooks completed by live projects

[40] Note, this increase is accounted for predominantly by one project which was able to report on the visitor expenditure at the final evaluation stage but not at the interim evaluation stage. This accounts for £9.3m.

Increased visitor numbers

4.5 Overall, **the total number of visitors reported** (by six projects) **to cultural destination partners/organisations was 21m**[41] – an increase of 2m visitors since August 2019. Visitors include the number of people that attended an event, festival or a cultural attraction associated with the project and delivered by or within the Cultural Destinations project area. For three projects, the visitor figures related to project specific events and festivals. This was corroborated with project documents and evaluation reports from completed projects, in which three projects noted an observed increase in visitor numbers. The other three projects included the total number of visitors to all cultural destination partners/organisations participating in the project; these figures were significantly higher. The total figure should therefore be treated with caution, as a large proportion of visits will not be directly attributable to the Cultural Destinations Fund programme.

4.6 In the interim and final consultations, nine projects said that visitor numbers to their area had increased during the period of project delivery. This was due to two main reasons:

- a better coordinated and joined-up visitor offer
- improved advertising and marketing, using online channels – including targeting specific audiences. Further information regarding the use of digital in advertising and marketing is set out in the case study summary below.

4.7 For example, one project focused their activities on grouping existing events together and collectively marketing this under a unique theme:

"The activity we delivered through the science and nature theme... resonated with consumers and partners as well. From a marketing and comms point of view, both in PR reach and digital activity, it captured people's imagination."

4.8 The survey findings show that the project **stakeholders agreed that,** in contrast to when the programme started in 2017, **the culture and tourism visitor offer is more joined up/coordinated locally;** 12 of 59 of respondents completely agreed, 35 somewhat agreed and three disagreed with this statement; the remaining responses were neutral.[42]

[41] Data was reported by six projects, although eight projects had aimed to report against this output at the interim evaluation stage. Note, one project was unable to report against this output due to delays in project delivery resulting from the COVID-19 outbreak.

[42] Survey question 10: 'Thinking about trends since 2017, to what extent do you agree with the following statements… the culture and tourism visitor offer is more joined up/coordinated locally.' 12 of 59 respondents completely agreed and 35 somewhat agreed. 2 respondents of 59 somewhat disagreed and a further 1 completely disagreed. 6 respondents answered, 'Neither agree nor disagree' and 3 respondents were not sure/was not applicable/did not respond.

Case Study – The use of digital in project delivery

Overall, 14 out of the 16 projects consulted mentioned some use of digital in project delivery. Digital marketing and social media were the most frequently reported use of digital (nine projects). This included the development of content, such as imagery and videos of the local area, and the use of digital marketing to facilitate a joined-up marketing approach. A destination marketing website was used by two projects to bring together the local culture and tourism offer; other projects utilised an existing website to create a new 'what's on' web page, including both culture and tourism activities, as a central source of information for visitors. The use of social media was very common and was found to be highly effective.

A number of projects focused on building digital capacity among the cultural organisations to increase their use of digital marketing. This included conducting a digital audit of partner organisations to understand their online presence and capabilities, then conducting training workshops based on specific themes that were identified as areas for improvement. Consultees said that cultural organisations' capacity, willingness and confidence to use digital technology had increased.

See Arts Council England website for the full case study.

4.9 Two projects were unable to provide visitor numbers to specific events/activities or across cultural organisations/partners as this information was not collected by the project, however, in the consultations they described that attendance at specific cultural organisations in the area had increased significantly. For example, one cultural organisation had unprecedented annual visitor figures, while another had trebled the visitor numbers observed in the previous year.

4.10 In contrast, three projects said that there had not been a substantial impact on visitor numbers either because this was not the intention of the project or because of the scale of the intervention:

- one project did not aim to increase visitor numbers as such, because the area did not have the infrastructure, including transport and accommodation, to support large numbers of visitors; instead, the project aimed to improve the local visitor and raise awareness of the offer
- another noted that the cultural activities offered and marketed were well received by local audiences, however, the offer was not sufficient to encourage the target audience to visit the area, and there was no impact observed to visitor numbers.

4.11 Finally, two projects did not have access to visitor numbers at the time of reporting. For one project, this was because visitor numbers to the area were not routinely collected. While for the other project, there is an 18-month lag in the visitor data available.

Increased visitor numbers from outside the project area and international visitors

4.12 In total, **four projects reported that they had received 869k visitors from outside the Cultural Destinations Fund project area** to the Cultural Destinations Fund destination, an increase of 92k since the figures reported in August 2019. The figures are primarily based on visitors to specific events/festivals. As baseline data is not available for each area, it is not clear to what extent the number of external visitors has changed since the start of the programme.

4.13 In consultations, four projects said that an increase had been observed in visitors from outside the project area. In most cases, this related to visitors from other regions, while for one project this was regarding visitors from their region.

4.14 In project delivery, three projects aimed to attract targeted audiences from locations outside of the region, for example:

- one project used a social media campaign to target audiences in Leeds to attend a festival; the festival attendance data showed the project was successful with a high number of attendees from Leeds
- another project commissioned work to develop new cultural activities to attract audiences from outside of the area and to increase overnight stays; however, this was challenging and despite subsequent marketing campaigns, an increase in visitors from outside the project area was not achieved.

4.15 The responses from projects regarding the number of international visitors to the project area was mixed:

- **only two projects reported on international visitors** in the monitoring data**, which totalled 2,272**; one project reported data from four events, and the other project reported data from known visitor numbers to cultural destination partners/organisations
- two projects noted that the data is not currently available due to a lag in visitor figures and delays resulting from the COVID-19 outbreak; however, this will be available in the future
- the remaining projects were unable to capture or quantify the number of international visitors; one project stated that attracting international visitors was not a key focus of the project.

4.16 Despite not being able to quantify figures, five projects said that, anecdotally, the area or specific cultural organisations have attracted more international visitors since the start of the project.

4.17 For two projects, the increased interest from international visitors was largely due to the unique cultural offer or event delivered by the Cultural Destinations Fund project. While the other three projects acknowledged that the project was part of a range of factors which are likely to have led to increased international visitors.

> *The kind of product that we were developing was niche… we got people coming from all over the world to [project area] because they wanted to see. We did attract people from much further afield. [One event] attracted wider audiences and people from America and attracted different audiences that would not have come to [project area].*

Diversification of the demographic of visitors

4.18 There was some evidence of a diversification of visitors to cultural destination partners/organisations across a small number of projects (four projects). **Four projects described that the demographic of visitors was starting to change and has diversified**; this included both visitors to specific events, and general visitors to the area (although the evidence was anecdotal). For example, one project reported that the audience demographic to cultural events had become more diverse, in terms of age and ethnicity, in contrast to the general (England) population and attendees to London's regular (indoor) cultural activity. Note, evidence of this was not corroborated.

4.19 Two projects suggested that **the Cultural Destinations Fund programme has enabled areas to better understand and consider the target demographic for culture** and the programme of activities delivered – **resulting in better targeted activity**. This has been achieved through the audience research which many projects undertook at the start of the programme.

Changes in visitor behaviour

4.20 Across the projects, **evidence of changes in visitor behaviour was somewhat limited**:

- few projects submitted data on visitor behaviour as part of the monitoring workbooks
- in the consultations:
  - four projects noted some changes in visitor expenditure, duration of stay, and overnight stays, as set out below
  - a small number of projects were uncertain or noted no significant change in visitor behaviour that they could attribute to their projects' work
  - some noted that this had not been measured or was dependent on legacy projects.

4.21 For many projects, this was not an objective and, while projects recognise this is a likely outcome if other outputs are achieved, the scale of the project funding was arguably not sufficient to deliver significant behavioural changes. Further information regarding the changes observed to visitor behaviour is set out in Annex E.

Barriers and enablers that affect the achievement of the objective

4.22 **Three key enablers** were identified from the evaluation research:

Table 4-2: Key enablers to changes to cultural visitors

Enablers
• **Focusing the visitor offer on place-based strengths**, or the unique appeal of the local area, and packaging this to visitors generated increased interest from both local audiences and audiences from outside the project area (including international audiences).
• **Undertaking audience research** at the start of project enabled areas **to understand their existing markets and identify target markets** to broaden the appeal of arts and culture; the ability to test different approaches or types of events was also beneficial in understanding which were more popular among different demographics.
• **Digital advertising and marketing, using social media channels, was particularly effective in targeting specific audiences in particular locations**; this was a relatively new approach for most cultural organisations – many of which recognised the benefits and intend to continue using these mechanisms.

Source: SQW

4.23 Various **barriers** were described by project leads **in achieving this aim**, three of which were common across the majority of projects:

Table 4-3: Key barriers to changes to cultural visitors

Barriers
• First, **the scale** of the Cultural Destinations Fund project **and the level of funding was not sufficient to deliver substantial changes to visitor outcomes.** For many projects, particularly those that were phase 2 only, this was not a focus or ambition of the project.
• Second, **to achieve behavioural change among audiences can require notable resource and can take a long time**; this is particularly the case for product development. For phase 2 only projects which have delivered over a shorter period, the project activities and softer outcomes achieved, such as improved partnership work, may not yet have led to observable visitor outcomes.

Barriers

- Third, **quantifying changes to visitor outcomes robustly has been a challenge for the majority of projects**, as described further in the section below. The anecdotal evidence from the consultations indicates that while some projects have made progress towards this objective, it has not been possible to evidence this due to issues with data collection.

Source: SQW

Addressing gaps in the evidence

4.24 **Most projects found it difficult to capture and quantify visitor outcomes**. This is **for three reasons**:

- baseline data and/or subsequent data has not been captured on visitor numbers to project destinations and/or cultural organisations/events
- projects have not yet been able to access visitor number data to specific events or activities
- projects are able to access visitor numbers/data; however, they are unclear on the extent to which any reported changes are attributable to the project.

4.25 The issue of attribution is not straightforward. An area could attract a higher number of visitors over the same period as the Cultural Destination Fund project is delivering but that increase could be due to another attraction. Conversely, an area might see a declining number of visitors overall, but that decline could have been moderated by successful Cultural Destination Fund activities.

4.26 Projects have addressed these challenges in different ways. For example, one project has implemented mechanisms to capture visitor numbers to events delivered specifically by the Cultural Destinations Fund project, rather than to attempt to understand the change in the total number of visitors to the area. Other projects have taken visitor numbers to the local area and applied a methodology to calculate the proportion of visitors that have attended as a result of the activities/programme run by the project.

4.27 While both approaches are helpful in indicating project impact, it is best to combine elements of both. Capturing visitor numbers to at least some of the Cultural Destination Fund activities provides an indication of their scale. This can then inform the assumptions used in a standard methodology to attribute impact of the whole Cultural Destinations Fund programme on the wider area based on regular assessments of visitor numbers.

4.28 **Future programmes that aim to increase cultural visitors would benefit from ensuring that this approach is implemented consistently and from the start of project delivery**. This would enable changes in visitor numbers to be aggregated at a programme level. At a project level, this could be facilitated by ensuring all project partners are aware of and agree to data sharing requirements.

The implications of the COVID-19 pandemic

4.29 The outbreak of COVID-19 and the associated government restrictions will have had a varying degree of impact on the Cultural Destinations Fund projects, depending on the projects' delivery status when the initial outbreak occurred in the UK (March 2020).

4.30 For the ten projects that completed by 2019, the COVID-19 outbreak is expected to have a limited impact on the outcomes achieved, as project delivery had concluded three months or longer in advance of the outbreak. However, there may be **implications for the sustainability of visitor outcomes**, as fewer visitors are likely to visit public places, in the short term at least, due to safety concerns regarding the COVID-19 virus.

4.31 For the five projects that completed in March 2020, the majority of visitor outcomes are expected to have been realised in advance of the outbreak as most of the visitor outcomes were directly related to the delivery of project events/activities. However, there are five main implications noted by projects:

- some projects were due to hold final celebratory events at the end of the funded phase of the project; due to the government restrictions, this could not happen. One project said that this could impact on the profile-raising ambitions and outcomes from the project
- one project was due to launch a 'What's on' website developed through the project in March 2020; however, this was delayed due to the COVID-19 outbreak
- one project had a follow-on event planned which was cancelled; the project lead noted their concern regarding whether, due to COVID, the project momentum may have been lost
- two projects said that partnership working has been suspended due to limited resources to maintain this, and the closure of the visitor economy – which means there are no activities/projects to coalesce around
- in the short term (at least), visitor outcomes achieved by projects will not be sustained as most cultural organisations are operating at reduced capacity or are closed; visitor numbers have also declined due to public safety concerns regarding COVID.

4.32 Two projects (which were due to complete in March 2020) were extended to November 2020 and to September 2021 respectively, as elements of project delivery had not yet been completed. Despite the extension, it has not been possible for the projects to deliver the final project activities as planned. For example, one project was due to deliver a large-scale city centre event which aimed to increase visitor numbers and footfall in the city centre. Due to the health and safety considerations and the social distancing requirements, this event was not possible. At the time of reporting, the overall impact on the two extended projects is not yet clear, however, it is unlikely that visitor outcomes would be achieved.

4.33 One project was due to finish in January 2021 following the launch of the project's main component of delivery in mid-2020. Due to the outbreak, the project was unable to deliver the main activity that was expected to generate visitor interest and numbers, including from international visitors. The launch of the products has now been postponed to spring 2021, with project completion in June 2021. The COVID-19 outbreak has had a significant impact on project delivery and has delayed outcomes by (at least) one year. Due to the ongoing situation with the pandemic, international visitor numbers are not expected to be realised, or will be realised to a lesser extent. The level of interest and visits from domestic audiences will not be known until later in 2021.

4.34 Further information regarding how the learning from the Cultural Destinations Fund programme can contribute to the recovery of the cultural sector and the resilience of cultural organisations is set out in Section 5.

Summarising the evidence

4.35 The evidence presented from the consultations indicates a positive direction of travel in relation to visitor numbers and the diversification of visitor demographics to project areas. For projects that have been able to quantify numbers, an increase in visitor numbers has been observed, both to the project areas and to specific cultural attractions. However, the majority of projects have found it difficult to evidence this aim and the overall evidence at a programme level is limited. In addition, a small number of areas did not aim to achieve visitor outcomes through the Cultural Destinations Fund project.

4.36 For projects that have evidenced visitor numbers, in several cases, a proportion of the visitor numbers would have been achieved without the Cultural Destinations Fund, as various events and festivals are likely to have taken place anyway. However, the resources provided through the programme is considered to have increased the attendance and visitor numbers at events and organisations and attracted wider audiences that may not have visited.

4.37 While there is insufficient evidence that the overall programme has contributed to the growth of the local visitor economy, mechanisms have been put in place by projects, through the programme, which could support the achievement of this objective in the future. For example, greater join up and awareness of the visitor offer locally, both from a stakeholder perspective and a visitor perspective.

4.38 To better evidence the achievement of this aim, it is recommended that in future programmes, projects are encouraged and supported to capture baseline data and to implement data collection mechanisms, where necessary, at the start of the project. This could be facilitated by implementing the programme evaluation in advance of, or at the point of the programme commencing.

5. Increased sustainability and resilience of cultural organisations

Key findings

- There were **mixed responses from projects on the extent to which changes had been observed to cultural organisations' income, funding and/or staffing –** only five projects provided examples of cultural organisations that had increased their income, or of additional funding that had been secured as a result of the project.
- While most projects did not (yet) result in increased financial income for cultural organisations, consultees highlighted ways in which organisations had gained learning and experience that has enabled them to act more commercially. Project leads also pointed to other outcomes which have or were likely to lead to greater sustainability or increased resilience for cultural organisations, such as improved partnership working and collaboration with private sector businesses (e.g., transport operators, hoteliers, Business Improvement Districts – see further detail in the section below). If sustained, these outcomes could lead to changes in cultural organisations' income, funding and/or staffing in the future.
- **Numerous changes and improvements were described by project leads in the activities, visitor offer and focus of cultural organisations - this was considered to be a key strength of the Cultural Destination Fund projects**.
- Two main changes were described in cultural organisations' activities: increased use of digital in delivery and greater partnership working with local businesses, particularly tourism businesses. Various projects described that the **relationship between local businesses and the cultural sector has improved, and this has resulted in several benefits** including: increased recognition from businesses of the value of culture for tourism/businesses and the role of culture in a place-making approach.
- Across the project areas, **the visitor offer has improved in two main ways**. Firstly, **through an increased and varied programme of activities on offer and**, secondly, **through better coordination of, and greater clarity on the local visitor offer**.

5.1 This section draws on the evaluation evidence to **assess the extent to which the following programme objective has been realised:**

- **Increased income leading to greater sustainability and resilience for cultural organisations and tourism businesses in local destinations**

5.2 Achievement of this objective was measured using a set of outcomes (developed in the programme logic model):

- changes in income, funding and staffing for cultural organisations
- changes in the activities, visitor offer and focus of cultural organisations
- increased business engagement in local arts and culture organisations/activities.

5.3 This section, and the two sections that follow (section 6 and 7), draw on evidence from the consultations with 16 project leads, information from the monitoring and evaluation reports (both interim and final) of all 18 Cultural Destinations Fund projects, and the findings from the stakeholder e-survey.

Evidence of outcomes

Changes in income, funding and staffing for cultural organisations

5.4 **There were mixed responses from projects in the extent to which changes had been observed to cultural organisations' income, funding and/or staffing**:

- three projects provided examples of cultural organisations that have increased their income, through increased ticket sales
- two projects said that the project area or specific cultural organisation had secured additional funding, in part, due to the Cultural Destinations Fund project
- two projects gave examples of how cultural organisations were acting more commercially as a result of the project, which is likely to lead to changes in income in the future (although changes have not yet been observed)
- four projects said that they had not aimed to increase the level of income or funding for cultural organisations, and this was not within the scope of the Cultural Destinations Fund project.

5.5 The **examples of increased income secured through ticket sales** was achieved through various means. For example:

- One project supported an art gallery to work with a commercial operator to promote an existing tour that they offered. Despite the cultural organisations' initial hesitance to commercialise their activity to this extent, the partnership was successful and ticket sales, and thus income, increased substantially.
- Another project said that various cultural organisations had experienced increased visitor numbers which is likely to result in increased sales; while other factors are likely to have initially attracted visitors to the area, the resources prepared through the programme were a factor in informing and guiding visitors to a range of attractions locally.

5.6 Following completion of the Cultural Destinations Fund programme, **two projects had secured additional public sector funding**:

- One project secured £36k of ERDF funding in 2020. This 18-month fund will support the project to focus on the two specific outcomes that, based on their work with the Cultural Destinations Fund programme, they felt valuable: supporting the delivery of events, and development of partnerships with local stakeholders and HE institutions.
- Following project completion, another area secured £73k of funding from their Local Enterprise Partnership (LEP) and the local council. This is primarily to support the continued coordination of cultural activities and to provide continued resource for two cultural organisations/activities.

5.7 While most projects did not (yet) result in increased financial income for cultural organisations, consultees highlighted ways in which organisations had gained learning and experience that has enabled them to act more commercially. Project leads also pointed to other outcomes which have or were likely to lead to greater sustainability or increased resilience for cultural organisations (including in the context of the COVID-19 outbreak). Further information regarding the outcomes is set out in the case study regarding the resilience of cultural organisations below.

5.8 Projects felt it unlikely that cultural organisations had changed staffing as a result of the Cultural Destinations Fund programme. However, in response to the survey, **over two-thirds** (41 of 59) **of survey respondents reported that, the cultural sector in their area supported a higher number of jobs** by March 2020 compared with 2017 (when the project started).[43] Slightly fewer, but still a majority (35 of 59) of participants responded that the number of jobs in the local tourism sector had increased.[44] Very few respondents disagreed with either statement, indicating that where the number of jobs had not increased in either sector, the number of jobs is likely to have been sustained.

[43] Survey question 6: 'Thinking about trends since 2017, to what extent do you agree with the following statements… the cultural sector supports a higher number of jobs locally.' 15 of 59 respondents completely agreed and 26 respondents somewhat agreed. 13 respondents neither agreed nor disagreed, 5 respondents disagreed.

[44] Survey question 6: 'Thinking about trends since 2017, to what extent do you agree with the following statements… the tourism sector supports a higher number of jobs locally.' 14 of 59 respondents completely agreed and 21 respondents somewhat agreed. 20 respondents neither agreed nor disagreed, 4 respondents disagreed.

Case Study – Resilience of cultural organisations

Organisational resilience was interpreted in different ways by consultees. Some noted the financial aspect with collaboration being associated with cost efficiencies derived from sharing resources or the creation of higher turnover through ticket sales. Others thought that the process of collaboration created its own value due to greater collaboration and partnership working increasing confidence and capacity to innovate. Project leads said that collaboration, being well networked, and having the capacity to develop partnerships were all helpful for building resilience.

Most projects also said that partnership working and collaboration between cultural organisations, and across cultural and tourism businesses had increased and/or improved due to the Cultural Destinations programme. It had changed cultural organisations' perception of the value of collaboration and how to collaborate. As a result, partners have continued to work together beyond the lifetime of the project.

See Arts Council England's website for the full case study.

Changes in the activities, visitor offer and focus of cultural organisations

5.9 **Numerous changes and improvements were described by project leads in the activities, visitor offer and focus of cultural organisations - this was considered to be a key strength of the Cultural Destination Fund projects**.

Activities

5.10 Two main changes were described in cultural organisations' activities:

- increased use of digital in delivery
- greater partnership working with local businesses, particularly tourism businesses.

5.11 **Nine projects said that the use of digital in the activities of the cultural organisations working with the project had increased significantly**. This had increased as result of the digital training delivered to cultural organisations as part of the project, and by gaining experience of delivering digital activities through project delivery.

5.12 The **digital changes to cultural organisations' activity was primarily in relation to marketing and advertising**. For example, targeted marketing campaigns were undertaken using social media platforms, and online imagery and video content was developed to support marketing. Several projects also developed or improved a destination website. For one project, the benefits of digital marketing were such that the project partners made changes to their planned marketing activities to deliver a longer-term social media campaign. Further information regarding the use of digital is set out in the case study summary in section 4.

5.13 Two projects are now working more closely with businesses and tourism businesses in their local area. This includes delivering joint marketing campaigns and working with tour operators and hoteliers to target specific audiences or to advertise cultural products. One project said that the development of partnerships with more experienced organisations enabled the cultural organisations to access support and advice relating to the visitor economy.

5.14 Looking forward, responses to the survey show that project partners will or are likely to make changes to their activities as a result of their participation in the Cultural Destinations Fund project:

- 36 of 59 survey respondents reported they would apply the lessons they had learnt from the programme to their own organisation
- 25 of 59 respondents planned to create their own activities/events based on the Cultural Destinations Fund experience.[45]

Visitor offer

5.15 Across the project areas, **the visitor offer has improved in two main ways**. Firstly, **through an increased and varied programme of activities on offer and**, secondly, **through better coordination of, and greater clarity on the local visitor offer**.

5.16 Through the Cultural Destinations Fund programme, a number of projects have developed and delivered new products (such as itineraries) and events to enhance the local cultural visitor offer. This has increased the number of cultural activities available in the local areas and, through the creation of new products and events, has delivered variety to the visitor offer. In particular, many projects have used digital to create an innovative and new visitor offer. For example, one project developed a virtual art gallery which can be accessed online using virtual reality; another project used augmented reality to project historic images/videos to enhance the visitor experience. Note that these activities were developed before the COVID-19 outbreak.

5.17 As a result of the Cultural Destination Fund activities, **eight projects said that the visitor offer is now better coordinated and aligned, and there is greater clarity among stakeholders and audiences on the local visitor offer**. This has been achieved through:

- improved partnership working between cultural and tourism stakeholders and the development of formal networks

[45] Survey question 14: 'How (if at all) do you intend to build on the Cultural Destinations Fund experience?' Multiple choice responses included: 'We will apply the lessons we have learned from the programme to our organisation' (36 of 59 respondents selected Yes, 23 selected No) and 'We will create our own activities/events based on the Cultural Destinations Fund experience' (25 of 59 respondents selected Yes, 34 selected No).

- joined-up place-based marketing focusing on the areas' strengths
- a central website that features the culture and tourism offer for the area in one place (e.g. a 'What's on' web page/site).

Focus

5.18 **Eight projects provided various examples of the ways in which arts and culture organisations have increased their capacity and altered their focus** as a result of the Cultural Destinations Fund project. This was particularly **in relation to improved knowledge of tourism and travel trade**, including an understanding of: routes to market, the lead in time for programme and product development, and the commercial benefits of investing in culture. For example, one project explained that organisations were identifying and focusing on attractions that could be packaged to tourists all year round, to align with the lead in time for tourism programme development.

5.19 Two projects noted that there is a **greater understanding and focus among cultural organisations of target audiences and visitors**. This is partly through the audience and perception research undertaken in the early stages of the Cultural Destinations Fund projects. Cultural organisations are demonstrating increased consideration of their audiences and, in some cases, are targeting specific visitors.

5.20 Where the focus of organisations has improved, projects believe that this will lead to positive impacts for cultural organisations, in terms of increasing visitor numbers, improving the perception of the area as cultural destination and increasing financial sustainability. It is expected that cultural organisations will also be able to better identify opportunities to work collaboratively with the tourism industry. However, it is notable, that this was not a universal finding as three projects reflected that the cultural sector has not yet fully understood the tourism sector.

Increased business engagement in local arts and culture organisations/activities

5.21 To March 2020, **over 1,500 private sector businesses were engaged** by 10 Cultural Destinations Fund projects (as reported in the project outputs in Section 2). This was reflected in the consultations in which a number of projects described that the **relationship between local businesses and the cultural sector has improved**.

5.22 In response to the survey, **47 out of 59 respondents reported increased engagement from local businesses in local arts and culture activities/organisations**, such as joint promotional activities or events.[46] Shared initiatives, such as brand partnerships or shared websites, were reported to be enablers of this.

[46] Survey question 9: 'Thinking about trends since 2017, to what extent do you agree with the following statements… there is increased engagement from local businesses in local arts and culture activities /organisations (e.g. joint promotional

5.23 The type of businesses engaged by the projects varied and included both tourism related and non-tourism related businesses. For example, transport providers, cafes and shops, hoteliers. Larger business representative organisations were also engaged by projects such as Business Improvement Districts (BID) and Chambers of Commerce.

5.24 Businesses engaged with projects in a number of ways including providing sponsorship and in-kind support, delivering joint events and activities, and co-creating and contributing to formal partnership structures. For example, one project lead described how the project worked with over 800 businesses; a number of whom had sponsored events and trails which has delivered several networking benefits to all the organisations involved. Further information regarding how businesses engaged with projects is set out in the accompanying case study, 'Working with private sector partners'.

5.25 **Projects described several benefits that had been realised as a result of engaging local businesses**, including:

- increased recognition from businesses of the value of culture for tourism/businesses and the role of culture in a place-making approach (e.g. in improving the attractiveness of the area, enhancing the visitor offer, and increasing footfall)
- increased demand from businesses to be associated with culture as well as an increased awareness, at a local level, of the cultural offer
- an improved and comprehensive visitor offer
- a greater reach to a larger audience and prospective visitors
- the formation of new working relationships/partnerships between sectors that would not typically collaborate (such as, between transport businesses and cultural organisations).

5.26 As part of their rationale for engagement, three areas' project leaders referenced a relatively less well-established cultural offer. In these three areas, business engagement was slower than anticipated. One project described that "*this will take time due to the size of the area we operate over*". While two projects said that the engagement of local businesses had been limited, however, that this is a longer-term focus for the area.

Barriers and enablers that affect achievement of the outcome

5.27 Project leads identified **three key enablers** which have led to the outcomes achieved by cultural organisations:

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activities, events, etc.).' 12 of 59 respondents completely agreed with this statement, 35 somewhat agreed. Only two respondents disagreed, the remaining ten gave a neutral or no response.

Table 5-1: Key enablers to increased sustainability and resilience of cultural organisations

Enablers
• **Effective partnership working and collaboration:** ➢ working in partnership with tourism organisations enabled cultural partners to gain a better understanding of the tourism sector and increase their awareness of how to work more commercially - and the benefits of this ➢ developing or enhancing the visitor offer in collaboration with a range of stakeholders was key to ensuring there was alignment of the central visitor offer; this presented a clear offer to audiences.
• **Relevant training for cultural organisations:** ➢ the training delivered to cultural and tourism organisations created increased awareness and a better understanding among each of the sectors and how they operate; subsequently, some organisations reflected on how they could change their activities to better align with the other sector ➢ the digital training undertaken by cultural organisations improved their knowledge of the opportunities and benefits of using digital in project delivery and in product development; this resulted in projects using digital approaches more routinely, with many sustaining this following project completion.
• **Working with business representative organisations**: ➢ working with organisations such as BIDs, was particularly beneficial in reaching a large number of local businesses and achieving ongoing engagement and input from businesses.

Source: SQW

The **barriers explained by the project leads** were in relation to difficulties in engaging the private sector, particularly accommodation providers; and changing the mindset of cultural organisations to act more commercially. **Two key barriers** were described regarding the engagement of the private sector:

- **Securing initial engagement from the private sector and tourism businesses can be challenging and takes time;** projects reported that the commercial benefits of collaboration were not always fully understood by businesses. Capacity of private sector partners to engage was also a barrier in some cases as some independent businesses were small with limited staffing capacity; this is expected to become more challenging going forward due to the COVID-19 pandemic, as smaller businesses will be focused predominantly on survival.
- Several projects highlighted **issues around engagement with local, and, generally, larger hoteliers and accommodation providers**; this was noted as an impediment to developing visitor packages. This was difficult for two reasons: firstly, for larger,

corporate hotels, their policies on who they can develop packages with is developed centrally, and therefore the local hotel manager has limited local discretion. Secondly, many hotels are reluctant to, or do not have the authorisation to pay commission to the tour operator delivering the packages. Consequently, one project found that it was easier to work with small, independent hoteliers in developing packages. In some areas, this resulted in a lack of a joined-up visitor offer and created a challenge for projects in achieving an increase in overnight visitor stays. This is a common barrier experienced by a range of urban projects.

5.28 For the majority of projects, the cultural organisations engaged as part of the project were open and receptive to new and improved ways of working. However, there were a small number of examples from projects of **challenges that had been experienced as a result of reluctance from cultural organisations to adapt their ways of working**. **Three key barriers** were described:

- **organisations' appetite to become more commercial** – two projects provided examples of one or more cultural organisations which had limited interest in operating under a more commercial model; one project lead described that a commercial approach is often viewed negatively by cultural organisations, as it does not (appear to) align with the ethos of arts and cultural organisations – which are typically focused on more social or wellbeing objectives
- **organisations' capacity to attend training** – many of the projects delivered free training to cultural organisations as part of the Cultural Destinations Fund project and, in some cases, projects experienced a reluctance from organisations to attend; this was due to limited capacity in the organisation to attend and to take away and implement lessons from the training
- **organisations' difficulties in adapting to tourism timescales** – to better align the local visitor offer and to operate more strategically it is necessary for the cultural and tourism sector to work to the same timescales, including appropriate lead in times for product and event planning. This was challenging for some cultural organisations which typically work to shorter timescales, focusing on the next season or quarter. Some cultural organisations were unable to adapt products or offer activities over the longer term.

Addressing gaps in the evidence

5.29 Most of the evidence presented against this aim is indicative of 'greater sustainability and resilience for cultural organisations'. While the evidence presents a rounded view of sustainability and resilience (rather than financial income being the only indicator), there is limited quantifiable evidence on the extent to which income has increased for cultural organisations or tourism businesses. This is because the data has not been systematically collected at a project or programme level – a baseline position has not been collected at the start of the programme, and data has not been collected from cultural organisations or tourism businesses following engagement with the programme. To fully assess whether this aim has been achieved, **it is recommended for future programmes that financial data is collected from participating organisations and businesses pre- and post-engagement with the project**.

5.30 The majority of the evidence from the consultations is focused on the sustainability and resilience of cultural organisations, rather than tourism businesses. The overall programme has engaged over 1,500 businesses across project delivery and **the evaluation would benefit from direct feedback from businesses on the outcomes achieved through the programme**, particularly in relation to sustainability and resilience. Over a third (20 out of 59) of respondents to the survey were businesses, however, this represents a small number in contrast to the total number of businesses engaged.

The implications of the COVID-19 pandemic

5.31 As a result of the government restrictions implemented in response to the pandemic, the outbreak is expected to have a negative impact on the ability of cultural organisations and tourism businesses to increase their income as many organisations and businesses will have to close or operate at reduced capacity.

5.32 While funding has been made available by the UK Government to support businesses and organisations, for example through the Culture Recovery Fund[47] and the Kick-starting Tourism Package[48] as well as non-sector-specific funds such as the Job Retention Scheme; the longer-term effects of COVID, and the availability of central support funding moving forward is unclear.

5.33 Some of the **key challenges and possible implications** highlighted by project leads include:

- uncertainty of funding and the long-term resilience of cultural organisations, particularly those more reliant on private rather than public income
- the potential loss of local businesses and organisations which will create challenges in maintaining existing itineraries, or developing new itineraries
- maintaining relationships between the cultural and tourism sector without the impetus of attracting visitors
- maintaining the role and value of the cultural sector in the visitor and night-time economy when it is not possible to open or operate as normal.

5.34 Despite the challenges presented, **consultees were relatively positive about how the outcomes delivered by the Cultural Destinations Fund programme are and could, in part, help to facilitate how cultural organisations respond locally**. Three examples were provided:

[47] https://www.gov.uk/guidance/funding-available-through-the-culture-recovery-fund
[48] https://www.gov.uk/government/news/government-announces-10-million-for-small-businesses-to-kickstart-tourism

- the partnership structures and arrangements between the cultural organisations, developed through the programme have enabled organisations to work together and share information regarding how best to respond (e.g. through regular online meetings)
- the digital skills and knowledge developed through participation in the programme enabled organisations to transition to remote working and to adapt products and services for online delivery (e.g. virtual art galleries)
- the increased recognition of culture's contribution to the economy, achieved in part, through the programme, means culture is playing a notable role in the local plans for economic recovery following the COVID-19 pandemic.

5.35 Further information regarding organisational resilience in the context of the COVID-19 outbreak is set out in the full case study: 'Resilience of Cultural organisations' available on the Arts Council England's website.

Summarising the evidence

5.36 The evidence from the consultations with project leads shows that income has increased for a small number of cultural organisations and that this is likely to lead to greater sustainability and resilience. However, **for the majority of project areas there is limited evidence that income has increased among cultural organisations and tourism businesses as a result of the programme**. Projects said that this is for three reasons:

- firstly, income data has not been collected for organisations or businesses
- secondly, this outcome has not been or is unlikely to have been achieved by projects alone due to the scale of funding
- thirdly, projects were not developed with a view to having a direct impact on increasing the income of cultural organisations or tourism businesses.

5.37 **However, the achievement of broader outcomes** (such as increased capacity in digital skills), as highlighted in the case study on the resilience of cultural organisations, **indicates that cultural organisations may be more resilient**. This is demonstrated in how organisations have been able to respond to the COVID-19 outbreak; including transitioning to an online/digital offer. **The sustainability and resilience of tourism businesses is less clear**, and the evaluation has found limited evidence to suggest that the Cultural Destinations Fund programme has delivered on this aim.

5.38 The **COVID-19 outbreak means something entirely different for the resilience of cultural organisations and tourism businesses**. Consultations with project leads indicate that, as a result of the programme, cultural organisations may be better equipped to manage some of the challenges posed by the outbreak. However, at the time of reporting **it is too early to know the long-term effects on either cultural organisations or tourism businesses**.

6. Culture as a prominent part of the local economy

Key findings

- Evidence from the project consultations indicates that **culture has become a more prominent part of the visitor offer in Cultural Destinations Fund project areas**. There is increased recognition of the value of culture and greater alignment and collaboration between the tourism and cultural sectors. For some projects, this has been aided through the achievement of tangible visitor outcomes through the Cultural Destinations Fund programme and changes in the perception of areas as cultural destinations, both among internal stakeholders and external audiences.
- However, there is a **notable variation across the projects** in the achievement of this aim due to the starting position of each project. For example, some destinations have a well-known, existing visitor offer in which culture is already a prominent part. Therefore, project activities can focus on enhancing this. In contrast, other destinations have a limited visitor offer, both from a culture and tourism perspective; therefore, increasing the prominence of culture in the visitor offer requires greater time and resources and outcomes may take longer to be observed.
- The **role of culture and its contribution to the economy has gained increased recognition**. The examples provided by some projects of how culture has and will have a crucial role in the COVID-19 pandemic recovery plans for the visitor economy is a tangible demonstration of how the perceived value of culture and its contribution to the local economy has improved.
- Across the destinations, the extent to which the outcomes realised are a result of the programme was mixed. Some projects attributed outcomes solely to the Cultural Destinations Fund project, while other projects indicated that the promotion of culture and its economic value has been ongoing and pre-dated the Cultural Destinations Fund project. Therefore, whilst the Cultural Destinations Fund has supported this activity, it is likely that progress would have been observed in some areas, to some extent, as a result of other factors.

6.1 This section draws on the evaluation evidence to **assess the extent to which the following programme objective has been realised:**

- **Repositioning of culture as a prominent part of the visitor offer and local economic growth plans.**

6.2 Achievement of this objective was measured using a set of outcomes (developed in the programme logic model):

- **changes in perception of culture/tourism** and its value to the economy among cultural organisations, tourism businesses, policy makers/strategic decision-makers, senior public officers

- **increased representation of culture in the visitor economy**, including representation on strategic economic boards and in local economic growth plans and Destination Management Plans (or other relevant strategies).

Evidence of outcomes

Changes in the perception of culture/tourism and its value to the economy

6.3 The findings from the e-survey show that there has been **a shift in the perception of the cultural destination areas** from the start of the programme in 2017, to March 2020: the majority of survey respondents reported that **their area is better known for being culturally rich (52 out of 59) and as a tourism/leisure destination (37 out of 59).**[49] [50]

6.4 Six projects were surveyed in both phases 1 and 2 of the Cultural Destinations Fund programme evaluations, and therefore it is possible to compare their perceptions of culture and tourism in their local area between the programme phases. This shows that perceptions of the profile of their local area as a cultural destination had remained largely similar across phases:

- in phase 1, 93 per cent of survey respondents from the six projects reported that the project area was better known for being culturally rich, with 94 per cent agreeing in phase 2.

6.5 However, perceptions of the profile of the project area as a tourism/leisure destination decreased over the two phases:

- 89 per cent of respondents agreed that their area was better known for being a tourism/leisure destination in phase 1, in comparison to 63 per cent in phase 2.

6.6 This difference is not statistically significant but might suggest that more people are aware of the cultural offer of their areas at the start of the programme in 2020, than they were at the start of the programme in 2014.

"There is increased recognition that the arts have the potential to be used for regeneration and economic impact – not just audience development, but also economic development.
Cultural Destinations Fund Project Lead

[49] Note that nine respondents disagreed that their area was better known as a tourism/leisure destination, suggesting the programme has had a more positive impact on the profile of areas for culture than tourism – although the impact has been positive overall for the profile of local areas in both sectors

[50] Survey question 6: 'Thinking about trends since 2017, to what extent do you agree with the following statements…' 'My area is better-known for being culturally rich': 52 of 59 respondents agreed, 6 neither agreed nor disagreed and 1 answered 'Somewhat disagree'. 'My area is better-known as a tourism/leisure destination': 37 of 59 respondents agreed, 12 neither agreed nor disagreed, 9 disagreed and 1 gave no response.

6.7 The majority of project leads said that there is **increased recognition among local stakeholders of the value of culture and tourism to the local economy as a result of the Cultural Destinations Fund project**. One consultee explained: "[the] *Cultural Destinations Fund has enabled culture and tourism to be positioned within the broader place-making and economic development agenda*". Note that two projects stated that the perception of the sectors had not changed; one because the sectors' importance in the local economy was already recognised, and the other because there had been limited impact observed by the project.

"…the Council have changed their outlook and perspective on culture and what it can deliver over the past couple of years. When we first started, we were banging our own drum but now the Council are actually recognising the value of culture in driving forward the agenda for the area."

6.8 The consultation responses were substantiated in the e-survey to which most of the **survey respondents reported that the recognition of the cultural and tourism sectors' contribution to the local economy had increased** from when the programme commenced, in 2017, to March 2020:

- for the cultural sector, 51 out of 59 respondents reported that recognition of its contribution had increased; two reported that recognition had decreased
- for the tourism sector, 44 out of 59 reported an increase in recognition; again, two reported that recognition had decreased.[51]

6.9 Consultees reported that the economic importance of the cultural sector had become or was becoming increasingly recognised among a range of stakeholders, including: the council, local businesses, the LEP and among cultural and tourism organisations. **Projects provided several examples of how perception had or was changing**:

- changes to the lines of reporting: within one local authority, local decision makers working within the cultural sector now report to the economic development lead, rather than the arts lead; this is, in part, due to the increased recognition of the value of the culture sector to the local economy, achieved through the programme
- merging of culture and tourism council teams, placing the sectors on an equal footing and increasing alignment between the sectors
- increased representation of cultural organisations in local authority discussions and decision-making across wider thematic areas (e.g. environmental issues)

[51] Survey question 6: Thinking about trends since 2017, to what extent do you agree with the following statements…'
'… there is greater recognition of the cultural sector's contribution to the local economy.' 51 of 59 respondents agreed, 6 neither agreed nor disagreed, 2 somewhat disagreed.
'… there is greater recognition of the tourism sector's contribution to the local economy.' 44 of 59 respondents agreed, 13 neither agreed nor disagreed, 2 somewhat disagreed.

- greater recognition and representation of culture at broader local economic development meetings – for example, a Town Development Board
- greater buy-in and investment from the LEP – such as agreement to deliver a cultural strategy for the area
- increased public funding for cultural events and activities – including increased funding from the local authority.

6.10 **Three projects gave examples of how culture is increasingly recognised in national place-based policies and funding**, for example in the Future High Streets programme and the Towns Fund. At a local level, culture is now recognised as an activity that will attract place-based funding and is considered to be a key aspect of regeneration and how to make places more distinctive/attractive from an economic development perspective.

6.11 The Cultural Destinations Fund project was considered to be a key contributory factor in delivering the changes noted.

Increased representation of culture in the visitor economy

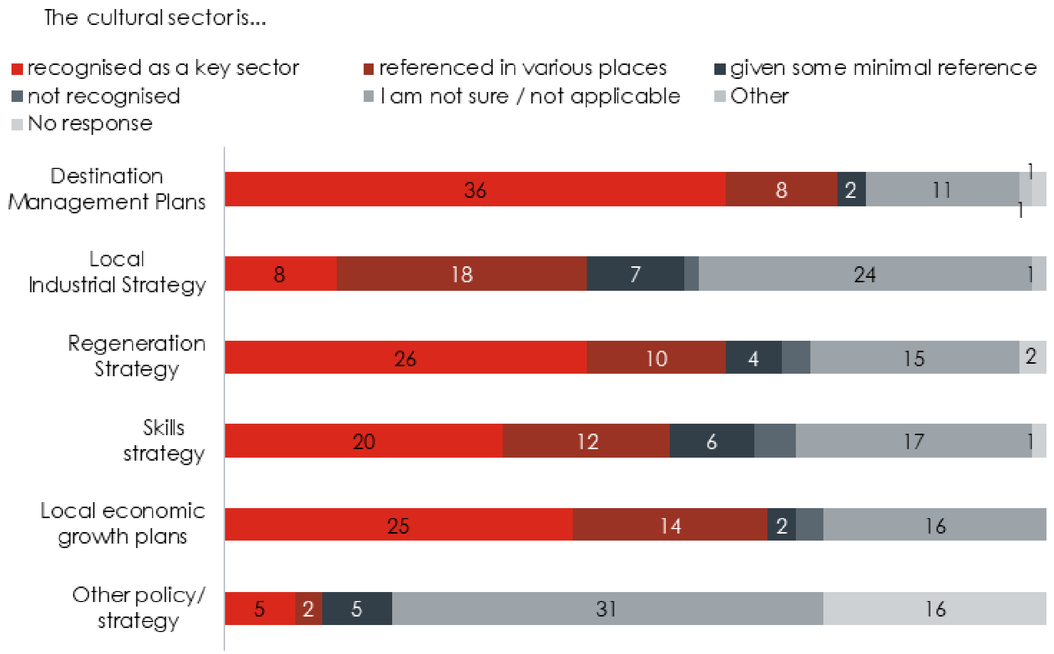
Recognising the role of culture in strategies / policies including local Destination Management Plans

6.12 For projects that noted a change in the perception of culture among policy makers, this change is reflected in the local economic growth plans and strategies of the Cultural Destinations Fund project areas. Many projects reflected that **culture is "far more prominent throughout polices, strategies, and economic thinking" more broadly**. For example, in one of the cultural destinations, 'Tourism' and 'Creative Industries' are the top two growth sectors (out of ten) identified by the LEP in its local economic strategy.

6.13 This view was also observed in the responses to the e-survey in which the **cultural sector was recognised as a key sector in regeneration strategies, local economic growth plans and skills strategies** (reported by 26, 25 and 20 out of 59 respondents, respectively - see Figure 6-1).[52]

[52] Survey question 8: 'To what extent is the cultural sector recognised in the following policies/strategies in your local area?' (n=59 respondents). For full dataset, see Annex Table F-7.

Figure 6-1: Survey question 8: 'To what extent is the cultural sector recognised in the following policies/strategies in your local area?' (n=59 respondents)



Source: Cultural Destinations Fund phase 2 evaluation, stakeholder survey

6.14 Over half of respondents (33 out of 59) responded that the cultural sector is recognised in Local Industrial Strategies, but more often this was 'referenced in various places' (18 respondents) or 'given some minimal reference' (7 respondents), rather than 'recognised as a key sector' (8 respondents).

6.15 In response to the survey, **just under 36 out of 39 respondents said that the cultural sector was recognised as a key sector in Destination Management Plans**. This suggests that that role of culture in the visitor economy is being increasingly recognised.

6.16 However, while there is increased recognition in the tourism sector of the role and contribution of culture (in Cultural Destinations Fund project areas), the evidence on **the role of culture in local Destination Management Plans (DMP) from the project consultations was limited**: only four projects made reference to a local DMP, although this was broadly positive. For example, two projects said that culture now features heavily in the local DMPs – with a focus on several towns that were involved in the project. For the majority of the remaining projects, a DMP has not been developed/implemented recently (since 2017/18).

Representation from cultural organisations in tourism/ the visitor economy strategic forums

6.17 There is good evidence that **engagement from cultural organisations in tourism visitor economy at a strategic level is increasing, however, further progress could be made in some areas.** Examples of strategic engagement of cultural organisations in tourism/the visitor economy provided by consultees included:

- representation on local economic development partnerships, including in BIDs: three projects said that there is increased recognition of culture in the visitor economy among their local BID; in two projects, cultural organisations are now on the board of the BID, including a BID recovery panel; this was not the case prior to the Cultural Destinations Fund project
- the role of the cultural sector in COVID recovery plans: several projects pointed to **the role of the cultural sector in destinations' COVID-19 recovery plans** as evidence of greater engagement of the cultural sector at a strategic level; three projects explained that the cultural sector has a key role in the recovery of the visitor economy, and that this is recognised by local stakeholders.

6.18 In response to the survey, stakeholders were broadly positive about the level of representation of the cultural sector on local economic development partnerships/boards (e.g. those led by the LEP/local authority/combined authority): 27 out of 59 respondents agreed that the level of representation of the cultural sector was appropriate. In contrast, nine respondents disagreed that there was appropriate representation of the cultural sector on local economic development partnerships/boards.[53] This suggests that representation of the cultural sector on local economic development partnerships/boards varies across the cultural destination areas.

6.19 In line with this, while projects stated that awareness of the project and/or the culture sector at the LEP has been raised, there was limited formal engagement of culture on LEP Boards. Where this was the case, this was primarily due to existing partnership arrangements. A number of projects were continuing to work towards securing representation of the cultural sector at the LEP and/or setting up strategic structures to enable cultural representatives to report into the LEP Board.

Culture and tourism are definitely working more together, and this is to do with the project. For example, …they have a solid relationship with the LEP. Alongside the LEP, the project is developing a recovery plan for the visitor economy which has culture knitted into it. Four years ago, it would have been difficult to do this. Now, all policy includes culture.

[53] Survey question 10: 'Thinking about trends since 2017, to what extent do you agree with the following statements…there is appropriate representation of the cultural /tourism sector on local economic development partnerships/boards (e.g. those led by the LEP/local authority/ combined authority).'
Cultural sector: 27 of 59 respondents agreed, 9 of 59 disagreed; the remaining 23 respondents answered Neither agree nor disagree, I am not sure/not applicable or gave no response.
Tourism sector: 26 of 59 respondents agreed, 7 of 59 disagreed; the remaining 26 respondents answered Neither agree nor disagree, I am not sure/not applicable or gave no response.

Barriers and enablers that affect achievement of the outcome

6.20 **Three key enablers** were identified by the project leads in the achievement of this outcome:

Table 6-1: Key enablers to culture becoming a prominent part of the local economy

Enablers
• **creating a consortium/partnership of cultural organisations locally and working together** presents a more joined up approach and gives culture a stronger voice locally, particularly when promoting the importance and value of the sector; this strengthens the perception of the area as cultural destination both internally to the locality and externally to visitors
• **raising the awareness of culture and tourism with key decision-makers** from local authorities, combined authorities, LEPs and DMOs ensures that the two sectors are involved in strategic decision-making and are better represented in local economic plans
• **participating in two phases of the Cultural Destinations Fund programme** (phase 1 and phase 2) has enabled projects to focus their efforts over a longer period on developing strategic relationships, and to continuously promote the value of the cultural sector – leading to increased recognition of the sector in the visitor economy. Further information regarding the benefits of longer-term participation in the Cultural Destinations Fund programme is set out in the full case study available on Arts Council England's website.

Source: SQW

6.21 The **main barrier described by projects was in relation to engaging strategic decision-makers**. A small number of projects found it difficult to engage decision-makers from the local authorities and the LEP. This was primarily for two reasons: a lack of existing strategic relationships locally, and insufficient internal resource and capacity to develop and maintain those relationships. This barrier was experienced predominantly by projects that were delivering across a smaller geography, and with less funding.

Case Study – The impact of longer-term participation

Eight projects were awarded funding in both phase 1 (delivered from 2014 to 2017) and phase 2 of the programme. Projects that participated in the two phases of the programme described various benefits in relation to the projects' ability to reposition culture as a prominent part of the visitor offer. This was predominantly as a result of securing funding over a longer delivery period. The benefits include:

- *the capacity to focus on strategic activities - as other project activities, such as the development of partnership arrangements, had been achieved through phase 1 of the programme*
- *the ability to develop long-term strategic relationships with key-decision makers*
- *increased evidence to better demonstrate visitor outcomes achieved through collaboration with the cultural sector to strategic decision makers*
- *a sustained period to continuously promote and lobby the value of the sector.*

See Arts Council England's website for the full case study.

Addressing gaps in the evidence

6.22 To assess the extent to which culture has been reposition as a prominent part of the visitor offer and local economic growth plans, it is necessary to understand the baseline positions for project areas in outcomes and metrics that are indicative of this outcome. For example, to gather baseline data in each destination on the extent to which culture is represented in specific strategies/policies (e.g. Destination Management Plans) and to repeat this exercise following project completion. To achieve this, it is recommended that the programme evaluation is developed and implemented prior to, or at the start of the programme to enable baseline data to be collected.

The implications of the COVID-19 pandemic

6.23 The initial implications of the COVID-19 pandemic on the repositioning of culture as a prominent part of the visitor offer and local economic growth plans appear to have been broadly positive. The devastating impact of the outbreak on the visitor economy has coalesced stakeholders, including the cultural sector, to work together to develop recovery plans. One project lead explained that the cultural and tourism sector are working alongside the LEP to develop a recovery plan, which has culture firmly embedded within it.

6.24 The consultations with project leads indicate that, in developing the recovery plans, there has been increased recognition of the role and the value of culture, alongside tourism, in attracting visitors and getting the visitor economy moving again. One project noted that they had been involved in discussions regarding using the work conducted in the Cultural Destinations Fund project as part of the recovery plan.

6.25 The relationships built with the local DMOs and the BIDs through the projects have also been beneficial. One project described that they have received support from both organisations during the current situation, which would have been more difficult to secure had previous relationships not been built through the programme.

Summarising the evidence

6.26 Evidence from the project consultations indicates that **culture has become a more prominent part of the visitor offer in Cultural Destinations Fund project areas**. There is increased recognition of the value of culture and greater alignment and collaboration between the tourism and cultural sectors. This has been aided through the achievement of tangible visitor outcomes through the Cultural Destinations Fund programme and changes in the perception of areas as cultural destinations, both among internal stakeholders and external audiences.

6.27 However, there is a **notable variation across the projects** in the achievement of this aim due to the starting position of each project. For example, some destinations have a well-known, existing visitor offer in which culture is already a prominent part. Therefore, project activities can focus on enhancing this. In contrast, other destinations have a limited visitor offer, both from a culture and tourism perspective; therefore, increasing the prominence of culture in the visitor offer requires greater time and resources and outcomes may take longer to be observed.

6.28 **The role of culture and its contribution to the economy has gained increased recognition**. This is partly a result of the strong partnership work that has taken place between projects and local stakeholders, such as local authorities, DMOs and combined authorities, which the Cultural Destinations Fund programme has galvanised. Locally, senior leaders and key strategic decision-making organisations were described to have prioritised work and investments in culture and tourism and **recognised the value of the two sectors within local economic strategies, LEP strategies and Destination Management Plans, where previously they had been less visible or connected**; although this is not the case across all the Cultural Destinations Fund projects. **Decision-makers**, in some areas, **increasingly supported the alignment of, and partnerships between, the cultural and tourism sectors**, both internally and across local organisations. In addition, there are multiple examples from projects of representatives of culture, or cultural organisations, increasingly being asked to join strategic boards. However, further work is required to ensure the role of culture is recognised consistently by LEPs and within local economic growth plans, such as the Local Industrial Strategy (LIS).

6.29 The examples provided by some projects of how culture has and will have a crucial role in the COVID-19 pandemic recovery plans for the visitor economy is a tangible demonstration of how the perceived value of culture and its contribution to the local economy has improved.

6.30 Across the destinations, the extent to which the outcomes realised are a result of the programme was mixed. Some projects attributed outcomes solely to the Cultural Destinations Fund project, while other projects indicated that the promotion of culture and its economic value has been ongoing and pre-dated the Cultural Destinations Fund project. Therefore, whilst the Cultural Destinations Fund has supported this activity, it is likely that progress would have been observed to some extent as a result of other factors. In addition, both the culture and tourism sectors have been given increased prominence in the Industrial Strategy through the Creative Industries and Tourism Sector Deals, and it is not clear the extent to which this has influenced local decision-makers' perception of the sectors.

7. Sustained public and private sector partnership working

Key findings

- The Cultural Destinations Fund programme has provided the resources and impetus to facilitate the development of new partnerships between the public and private sector, and to increase partnership working between a range of organisations and stakeholders.
- There is evidence to suggest that in the majority of project areas, partnership working will be sustained – this is evident in the formalising of partnership structures that have continued post-project completion, and the joint activities (e.g. marketing) that are continuing to take place.
- However, this is not a consistent view across the programme. A small number of areas, particularly those that are smaller or have limited resources/infrastructure, are not expecting to continue formal partnership arrangements. This is primarily due to the resource required to maintain this. It was anticipated that informal, ad-hoc partnership work will continue as and when relevant, drawing on the networks developed through the project.
- The extent to which partnership outcomes have been observed as a result of the programme is variable across the project areas. Three projects said that they were "already on the path" to improving partnership working, but the programme has accelerated and strengthened those partnerships. This is the case for a number of projects that participated in both phases of the programme. In contrast, in some project areas, relationships and partnerships did not exist at all and have been created for the first time. These areas are likely to be projects that have participated in phase 2 of the programme only.

7.1 This section draws on the evaluation evidence to **assess the extent to which the following programme objective has been realised:**

- **A commitment from public and private sector partners to continue working in partnership to support the growth of the local visitor economy through cultural tourism**

7.2 Achievement of this objective was measured using a set of outcomes (developed in the programme logic model):

- changes in partnership arrangements in CDF areas
- changes in how culture and tourism organisations engage, collaborate and/or coordinate their offer
- sustained consortia of tourism, culture and business partners.

Evidence of outcomes

Changes in partnership arrangements in CDF areas

Improvements in partnership working between culture and tourism in CDF areas

7.3 It was widely felt by projects that the **Cultural Destinations Fund programme had galvanised partnership working between the cultural and tourism sectors**. Almost all projects, both in consultations and within the project documents reviewed, highlighted an increase in coordination, networking and partnership working. This was one of the **projects' key successes** and potentially, **projects' most significant legacy**.

7.4 This finding was echoed in the stakeholder responses to the survey:

- **fifty-three out of fifty-nine survey respondents agreed that partnership work between cultural and tourism organisations had increased** during the Cultural Destinations Fund period (2017 to March 2020)
- **forty-five out of fifty-nine respondents agreed that communications between culture and tourism organisations/stakeholders has improved**.

7.5 Project leads reported that culture and tourism organisations are working more closely, collaborating more and sharing resources. Two projects explained that the sectors have an improved understanding of each other and greater awareness of opportunities for collaboration.

> *"The Cultural Destinations Fund has allowed the area to forge a deeper and stronger partnership with the cultural sector - there is greater engagement between culture and tourism and a greater understanding of how the two sectors can collaborate".*

7.6 This was partly facilitated through the formal partnership structures, such as steering groups and culture or tourism boards, that all but two projects implemented. These were typically created to deliver elements of project delivery or create appropriate structures for the management of the project. For example, one project created a marketing consortium which brings together heads of marketing from the cultural sector and from DMOs to deliver place-based campaigns. Before the Cultural Destinations Fund programme, such meetings were often ad-hoc or informal, and there was limited crossover between culture and tourism.

7.7 Project's relationship with and **collaboration with the local DMO was** noted by various projects as **fundamental in improving partnership working between culture and tourism**. This includes both formal and informal relationships. One project gave an example of how, as a result of the project, they now work collaboratively with the DMO to deliver certain events, and the DMO is supportive in promoting and advertising cultural events, such as exhibitions.

"The partnership with the DMO is probably the best outcome as it has been very fruitful."

7.8 Where partnership structures were not in place, projects had developed more informal arrangements. These were typically projects in areas where the local visitor economy was less developed. Two projects emphasised that having **dedicated resource to develop partnerships and collaborative working was critical**.

7.9 While progress has been observed in improving the partnerships between the cultural and tourism sector, three projects noted that there is still a way to go in developing and solidifying partnership arrangements between the two sectors.

7.10 **Other changes in partnership arrangements with and between local stakeholders were described by project leads in their local areas, resulting from the delivery of the Cultural Destinations Fund programme**. This includes new partnerships formed with the local BID – through demonstrating culture's role in attracting visitors to the area, and strengthened relationships with the DMO – which is expected to be sustained.

Changes in how culture and tourism organisations engage, collaborate and/or coordinate their offer

7.11 As a result of the partnerships and relationships formed through the Cultural Destinations Fund programme, project leads provided examples of changes in how culture and tourism organisations engage, collaborate and/or coordinate their offer.

7.12 Several **projects have created new networks that include representatives from both the cultural and tourism sectors**. For some projects, this has a specific purpose – such as the development of a cultural concierge network or a marketing consortium. While other projects have created networks to provide the opportunity for stakeholders to identify potential projects for collaboration and to give the visitor economy a stronger voice. One project described that they intended to continue the monthly culture sessions delivered by the Cultural Destinations Fund project as a way of regularly bringing partners together.

7.13 Six projects said that the **culture and tourism sectors are now working more collaboratively in the local area to deliver joint projects and events**. For example, one project described that the cultural and tourism partnership developed through the programme has been used to develop a package of activities across the region. This has been facilitated through a greater understanding and appreciation of the strengths of the sectors.

7.14 Another project described that the area is **drawing on the new partnership arrangements between culture and tourism organisations to test the viability of new initiatives together**, and there is greater appetite for taking risks and trying something new.

7.15 For three projects, collaborative activities have focused on marketing and PR for the destination. This included joint marketing campaigns around major events and institutions, and pooling resources to deliver shared campaigns. By presenting the visitor offer as a package, it was thought to have enhanced the local cultural offer and showcased the area as a cultural destination.

Sustained consortia of tourism, culture and business partners

7.16 Across the destinations, many projects reported that **consortiums**, in various forms, **have been established between tourism, culture and businesses**, as part of the Cultural Destinations Fund project. The maturity of the consortium was dependent on project's starting point, in terms of the existing partnership arrangements between the relevant stakeholders. In some cases, these arrangements were already set up and formalised, through regular meetings, for example. However, in other areas, the projects spent substantial resources in engaging partners and stakeholders and developing the relevant structures and mechanisms to create consortiums.

7.17 **Project's responses were varied when they were asked the extent to which networks or consortia would be sustained.** For example, four projects stated that networks and consortia, such as a marketing consortium and a cultural concierge network, has been (and will be) sustained following project completion. In contrast, two projects explained that while there were aspirations to continue partnerships, this was challenging, particularly during the pandemic, and partnerships have not continued.

Figure 7-1: Survey question 14: How (if at all) do you intend to build on the Cultural Destinations Fund experience? (multiple choice, n=59 respondents)

Source: Cultural Destinations Fund phase 2 evaluation, stakeholder survey

7.18 Similar findings were observed in stakeholders' responses to the e-survey which asked how (if at all) respondents intended to build on the Cultural Destinations Fund experience:

- respondents most frequently reported that they would continue to work with other local organisations that they had met through the Cultural Destinations Fund programme on a one-to-one basis (40 out of 59) - as shown in Table 7-1.
- however, just under half (27 out of 59) of respondents expected to continue to work with the lead organisation on future projects on a one-to-one basis.[54]

7.19 This question was asked in both phases of the Cultural Destinations Fund evaluation; Table 7-1 sets out the responses from the six projects who responded to both surveys. This shows that the proportion of respondents who reported the intention to take the above actions (to build on their Cultural Destinations Fund experience) decreased from phase 1 to phase 2:

- For example, 53 per cent of respondents in phase 2 responded that they will continue to work with the lead organisations on future projects (on a one-to-one basis), in contrast to 81 per cent of phase 1 respondents. However, note that this trend was not observed in the consultations with project leads who were broadly positive about sustaining consortia.

7.20 The reason for the difference in responses between phase 1 and phase 2 is unclear. However, the phase 2 survey was undertaken during the COVID-19 pandemic and it is expected that the capacity of cultural and tourism organisations to sustain partnerships or to apply lessons at this time, and in the near future, will be limited. This could have influenced stakeholders' responses.

Table 7-1: Survey question 14 (in phase 2): How (if at all) do you intend to build on the Cultural Destinations Fund experience?

We will…	Phase 1 % intending to take this action (n=47 respondents from 6 projects)	Phase 2 % intending to take this action (n=32 respondents from 6 projects)
…apply the lessons we have learned from the programme to our organisation	77	66
…sustain the business networks we have developed over the programme into the future	72	59
…continue to meet formally with the lead organisation and other stakeholders	64	41
…continue to work with the lead organisation on future projects (on a one-to-one basis)	81	53

Source: Cultural Destinations Fund phases 1 and 2 evaluations, stakeholder surveys

[54] Survey question 14: 'How (if at all) do you intend to build on the Cultural Destinations Fund experience?' (multiple choice).

7.21 As expected, for projects where **existing consortium or strong partnership arrangements exist, this is expected to continue** after the Cultural Destinations Fund programme. For example, the partnership activities in one project will be delivered under a strategic workstream, led by the Local Enterprise Partnership. However, for projects starting from a lower base, the sustainability of consortiums post-project completion is variable.

Barriers and enablers that affect achievement of the outcome

7.22 **Two key enablers were identified** in the consultations with projects leads:

Table 7-2: Key enablers to sustained public and private sector partnership working

Enablers
• **Implementing a role that is dedicated to managing and coordinating project partners and stakeholders is key**. This is particularly true for the management of large consortiums and/or multiple stakeholder relationships. Projects noted that the development and management of partnerships/consortiums, and the regular coordination to maintain this, was improved by having one individual responsible for this; which was helped if they had existing contacts/relationships in the destination.
• Delivering the project over two phases of the Cultural Destinations Fund programme (phase 1 and phase 2), thus **having a longer time to deliver the project, has been of notable benefit for developing and solidifying partnerships**. This enabled projects to focus activities in phase 1 on building partnerships/consortiums, and to build on and use those relationships to focus on project delivery in phase 2. Due to the duration of the partnership through two phases of the programme, networks and consortia are more likely to be sustained.

Source: SQW

7.23 While partnership development is considered a strength of the programme, project leads noted various **challenges in establishing and maintaining partnerships**. This was predominantly due to capacity and resource of the participating organisations:

Table 7-3: Key barriers to sustained public and private sector partnership working

Barriers
• Cultural organisations are typically small organisations with limited resource; similarly, the tourism sector is characterised by small and medium businesses. Project leads described that some of the organisations/businesses are not well networked; may lack capacity, in terms of skills and time; and have a high level of staff turnover. They are therefore not always able to take up opportunities offered through the project partnership such as training, marketing campaigns and contribution to meetings. This creates difficulties in engaging organisations, and encouraging them to participate in partnership activities, particularly when the benefits might be longer term or intangible.

Barriers

- For a small number of projects, the 'culture' inherent within cultural and tourism organisations reduced the level of collaboration and partnership working that was possible. This was particularly the case in areas which did not have a strong visitor economy; the culture was described as one of protectionism which discouraged information sharing and cooperation within and across industries. For example, one project described how initially cultural organisations were not willing to share data; although, this attitude has changed over time. This required greater resource from projects in attempting to shift organisational mindsets.
- Following completion of the project, resources and funding were no longer available to maintain partnerships and consortia which is a challenge for cultural and tourism organisations. Securing engagement from partners is also difficult without the impetus of a specific project or funding.

Source: SQW

Addressing gaps in the evidence

7.24 To assess the extent to which public and private sector partners continue to work in partnership, and consortia are sustained following completion of the programme, the evaluation would benefit from evidence generated over a longer-term. This would involve undertaking research a year or longer after each project has completed to collect evidence on whether partnerships have continued. This could be simplified by maintaining a start date and completion date that is consistent across the Cultural Destination Fund projects.

The implications of the COVID-19 pandemic

7.25 As expected, the COVID-19 pandemic has a negative impact on the ability of public and private sector partners to continue working in partnership, particularly in the first three to four months of the outbreak. However, the evidence from the consultations shows that there have also been positive implications for partnership working in some areas.

7.26 In the initial stages of the outbreak, most organisations were focused on risk management, maintaining operations (as much as possible), and accessing government support. During this time, consultees noted that many organisations became more insular, looking inwardly at survival. This meant there was limited communication between organisations and partnership working was non-existent.

7.27 However, following an initial challenging period of uncertainty, partnership structures, including regular communications and meetings, were reinstated and continued. Several projects described that meetings were moved online and, as a result of the crisis, became more regular. The existing meetings, set up through the Cultural Destinations Fund, were used as a mechanism to share ideas and develop a joined up and coordinated response locally as a sector/cross-sector. Organisations that were struggling were also able to access peer support through these mechanisms.

Summarising the evidence

7.28 The Cultural Destinations Fund programme has provided the resources and impetus to facilitate the development of new partnerships between the public and private sector, and to increase partnership working between a range of organisations and stakeholders. There is evidence to suggest that in the majority of project areas, partnership working will continue – this is evident in the formalising of partnership structures that have continued post-project completion, and the joint activities (e.g. marketing) that are continuing to take place.

7.29 However, this is not a consistent view across the programme. A small number of areas, particularly those that are smaller or have limited resources/infrastructure, are not expecting to continue formal partnership arrangements. This is primarily due to the resource required to maintain this. It was anticipated that informal, ad-hoc partnership work will continue as and when relevant, drawing on the networks developed through the project.

7.30 The extent to which partnership outcomes have been observed as a result of the programme is variable across the project areas. Three projects said that they were "already on the path" to improving partnership working, but the programme has accelerated and strengthened those partnerships. This is the case for a number of projects that participated in both phases of the programme. In contrast, in some project areas, relationships and partnerships did not exist at all and have been created for the first time. These areas are likely to be projects that have participated in phase 2 of the programme only.

7.31 While a number of projects are expecting to sustain the partnership arrangements created by the project, three projects noted that the consortia have been sustained to deliver non-programme related projects/work streams; such as the delivery of subsequent funding secured and activities relating to the DMP. Therefore, some of these partnerships are likely to have been developed and/or sustained regardless of the Cultural Destinations Fund programme.

8. Summary and key learning

8.1 The Cultural Destinations Fund programme phase 2 was a joint endeavour between Arts Council England and Visit England. They sought to build on phase 1 of the programme and to promote and enhance partnership working between their respective sectors. Phase 2 supported 18 localities over three years, with local level investment between £128k and £500k per area. This evaluation report has demonstrated the different approaches, challenges and achievements experienced by these areas. Based on evidence from participating projects and their partners, this report indicates that the programme has achieved locally variable but overall good progress towards delivering against the Cultural Destinations Fund phase 2 outputs and outcomes set out in the logic model.

8.2 This section draws on the information outlined to summarise the evidence against the three core evaluation questions, as set out in the introduction to this report.

Q1. How and to what extent has the Cultural Destinations programme met its overarching aims?

8.3 At this final stage, evidence shows **progress has been made towards achieving all four overarching programme aims** as set out in Table 8-1. Each aim has been assessed as having been 'partially met'. Localities have made different degrees of progress against the four aims, in some cases evidence is not available. A small number of projects said that the programme aim/s were not relevant to or within the scope of their project, or the funding was not of sufficient scale to make delivery of the programme aim/s achievable.

Table 8-1: Assessment of Cultural Destinations Fund programme aims

Aim 1. More and different types of people experience the arts and culture in local destinations in a way that contributes to the growth of the local visitor economy
Evidence of achievement
• Monitoring data from the live projects estimates that the **total number of visitors** to cultural destination partners/organisations (across eight projects) was **21 million.** • Baseline visitor data is not available across the project areas, and thus it is **difficult to attribute any increase solely to the Cultural Destinations Fund programme**. However, the visitor data provided has been produced primarily based on the number of visitors to new events delivered by the Cultural Destinations Fund project. This provides some confidence to claim that the programme has resulted in additional people experiencing arts and culture in local destinations. • **Project responses regarding impacts on visitor types were variable.** Some noted that this type of effect was beyond the scope of their project. However, other projects reported increases in visitors travelling from further afield, including international visitors. In addition, a small number of projects noted an increase in local audiences, including different types of audiences, for cultural organisations.

- Of the three projects that reported on visitor's origin, **869k visitors to cultural organisations/partners were from UK regions outside of the project area**.
- **Anecdotally**, there was **some evidence that increased visitor numbers has supported increased sales** (and revenue) by cultural and tourism organisations. For example, four project evaluation reports noted increases in visitor spend and/or duration of stay. However, a larger group of consultees stated they were uncertain regarding their project's impact on visitor spend and visit duration.
- Currently, **there is insufficient evidence to suggest that the local visitor economy has grown** (pre-COVID-19 outbreak), and the contribution of Cultural Destinations Fund projects to any such growth.

Aim 2. Increased income leading to greater sustainability and resilience for cultural organisations and tourism businesses in local destinations

Evidence of achievement

- **There is limited evidence to suggest that the Cultural Destinations Fund programme has led to increased income for cultural organisations/tourism businesses** across the cultural destination areas.
- A small number of examples were provided by projects of cultural organisations that have increased their income as a result of increased sales, mainly from a marketing campaign or from a new product offer. There were also some examples of projects that have worked with partners to develop joint funding bids or that have secured additional funding following project completion. In such examples, the sustainability of organisations was considered to have increased.
- A small number of projects felt they had not affected the financial sustainability of organisations or businesses as the level of project funding was not sufficient to achieve this, and/or that this was beyond the scope of the project.
- However, **the achievement of broader outcomes** (such as increased capacity in digital skills) **indicates that the resilience of cultural organisations is likely to have increased.** This is demonstrated in how organisations have been able to respond to the COVID-19 outbreak; including transitioning to an online/digital offer.
- The sustainability and resilience of tourism businesses is less clear, and the evaluation has found limited evidence to suggest that the Cultural Destinations Fund programme has led to greater sustainability and resilience among tourism businesses.

Aim 3. Repositioning of culture as a prominent part of the visitor offer and local economic growth plans

Evidence of achievement

- **The perception of the cultural sector has changed and there is increased recognition among local stakeholders of the value of culture and its contribution to the economy.** This has been aided through the achievement of tangible visitor outcomes through the Cultural Destinations Fund programme and changes in the perception of areas as cultural destinations, both among internal stakeholders and external audiences. However, each area started from a different position and there is a notable variation across the projects in the achievement of this aim.

- **There is greater strategic alignment between the cultural and tourism sector locally**, as evidenced by commitments in local strategic and economic growth plans (e.g. local economic strategies, LEP strategies and Destination Management Plans). Previously, the sectors had been less visible or connected; although this is not the case across all the Cultural Destinations Fund projects. This is partly a result of the strong partnership work that has taken place between projects and local stakeholders, such as local authorities, combined authorities and DMOs, which the Cultural Destinations Fund programme has galvanised.
- **There is increased joined-up working and greater investment in culture and tourism locally**. This is demonstrated by the partnerships between the cultural and tourism sectors, both within and across local organisations. In addition, locally, senior leaders and key strategic decision-making organisations were described to have prioritised work and investments in culture and tourism. However, further work is required to ensure the role of culture is recognised in local economic development, including by the LEPs and within local economic growth plans, such as the Local Industrial Strategy (LIS), across all the project areas.
- The examples provided by some projects of how **culture has and will have a crucial role in the COVID-19 pandemic recovery plans for the visitor economy** is a tangible demonstration of how the perceived value of culture and its contribution to the local economy has improved.

Aim 4. A commitment from public and private sector partners to continue working in partnership to support the growth of the local visitor economy through cultural tourism beyond the life of the Cultural Destinations Fund programme

Evidence of achievement

- On the whole, the **evidence on the sustainability of local partnerships is positive**. There are multiple examples provided by completed projects of **partnerships** that **have continued after project delivery completed**. This is also the case for the collaboration that has taken place between the cultural and tourism organisations and the local LEP, DMO or authority.
- However, this is not a consistent view across the programme. A small number of areas, particularly those that are smaller or have limited resources/infrastructure, are not expecting to continue formal partnership arrangements. This is primarily due to the resource required to maintain this. It was anticipated that informal, ad-hoc partnership work will continue as and when relevant, drawing on the networks developed through the project.
- The extent to which partnership outcomes have been observed as a result of the programme is variable across the project areas. Several of the projects that participated in both phases could have been considered to be "already on the path" to improving partnership working, but the programme has accelerated and strengthened those partnerships. This is the case for a number of projects that participated in both phases of the programme. In contrast, in some project areas, relationships and partnerships did not exist at all and have been created for the first time. These areas are likely to be projects that have participated in phase 2 of the programme only.

Source: SQW

Q2. What have been the main barriers and enablers to achieving the programme aims across the Cultural Destination Fund areas?

Enablers

8.4 The **enablers of project successes**, as noted by the projects, were multiple and **were experienced to a varying degree**, dependent on the focus of project delivery. Six common themes which were experienced across the 18 projects are presented in Table 8-2.

Table 8-2: Key enablers in realising the Cultural Destinations Fund aims

Key enablers
Strong partnership working
• Creating a consortium/partnership of cultural organisations locally and working together presents a more joined up approach and gives culture a stronger voice locally, particularly when applying or lobbying for funding. This can create efficiencies in reducing duplication of effort in areas such as marketing and promotional activities. In addition, presenting a clear, joined-up cultural offer, both internally to the locality and externally to visitors, strengthens the perception of the area as cultural destination. • Working in partnership across multiple sectors locally is advantageous. This creates opportunities for open communication and joint understanding about what the visitor offer is, and should be, and through joined up delivery, strengthens the visitor offer. • **Raising the awareness of culture and tourism with key decision-makers** from the local authorities, combined authorities, and DMOs ensures that the two sectors are involved in strategic decision-making and are better represented in local economic plans.
Dedicated project manager role
• **Implementing a role that is dedicated to managing and coordinating the project activities is key.** This is particularly true for the management of large consortiums and/or multiple stakeholder relationships. Projects noted that the development and management of partnerships/consortiums, and the regular coordination to maintain this, was improved by having one responsible individual. It was beneficial if they could build on existing contacts/relationships in the destination.
Relevant, targeted cultural offer
• **Undertaking audience research** at the start of project enabled areas **to understand their existing markets and identify target markets** to broaden the appeal of arts and culture; and the ability to test different approaches or types of events was also beneficial in understanding which were more popular among different demographics. • **Focusing the visitor offer on the unique appeal of the local area or the existing cultural offer**, and packaging this to visitors through new itineraries or thematic marketing can generate increased interest from both local audiences and audiences from outside the project area (potentially requiring fewer resources). **This is also an effective approach to creating a stronger cultural offer and improving the perception of the area as a cultural destination.** Existing cultural organisations/events benefit from this approach through increased promotions and improved ticket sales, which may contribute to increased sustainability and resilience in the cultural sector.
Using digital channels in marketing and promotions

Key enablers
• **Digital advertising and marketing**, using social media channels, **was particularly effective in targeting specific audiences in particular locations**; this was a relatively new approach for most cultural organisations – many of which recognised the benefits and intend to continue using these mechanisms.
Building capacity in the cultural sector through relevant training
• **The training delivered to cultural and tourism organisations was effective in increasing organisations' awareness of opportunities for different ways of working** – including working more effectively with the tourism sector and increasing the use of digital in project delivery and in product development; this resulted in projects using digital approaches more routinely, with many sustaining this following project completion
Longer-term delivery
• Delivering the project over two phases of the Cultural Destinations Fund programme (phase 1 and phase 2), thus **having a longer time to deliver the project, has been of notable benefit for projects**. This has enabled projects to focus activities in phase 1 on audience research, product testing, and building partnerships/consortiums, and to further develop this in phase 2; subsequently implementing new products, strengthening partnerships, and better promoting the cultural sector.

Source: SQW analysis of Cultural Destinations Fund evaluation evidence

Barriers

8.5 There were a number of **barriers** presented in the consultations **which inhibited projects' ability to deliver some of the programme aims locally**. While the barriers listed in Table 8-3 are not exclusive to specific projects, the evidence indicates that **smaller projects** (both in terms of the amount of funding received and the geography of the project) **are more likely to experience them.** The barriers have been described as five key themes in Table 8-3.

Table 8-3: Key barriers to realising the Cultural Destinations Fund aims

Key barriers
Limited number of high profile cultural attractions
• Projects delivering in areas where the cultural offer was less developed focused their resources on developing an offer and implementing new events/products, etc. to the market. This meant projects had fewer resource for other activities, such as partnership coordination, engagement of policy makers, and marketing and promotions. While such projects have made good progress, the outcomes they have achieved are more modest, and harder to evidence.
Engaging strategic decision-makers
• Project areas delivering across a smaller geography, with less funding, found it difficult to engage strategic decision-makers, from LAs, LEPs and DMOs, for example. This is for two reasons; a lack of existing strategic relationships locally, and insufficient internal resource and capacity to dedicate to developing and maintaining those relationships.
The scale of the project

Key barriers

- Smaller scale Cultural Destinations Fund projects have prioritised some of the programme aims, with an expectation of working towards others in the longer term. Examples of longer term aims include an increase in visitor numbers across the wider area, and increased income and financial sustainability of cultural organisations.
- The level of funding has also presented challenges for smaller projects in evidencing outputs/outcomes, as **data collection measures have not been implemented**; although, for outcomes, this is common across a number of projects.

Engaging the private sector

- Several projects described **difficulties in engaging local hoteliers and accommodation providers**, in part, due to the businesses' limited capacity. In some areas, this has resulted in a lack of a joined-up visitor offer and creates a challenge for projects in achieving an increase in overnight visitor stays. This is a common barrier experienced by a range of urban projects.
- **Securing initial engagement from the private sector and tourism businesses can be challenging and takes time;** projects reported that they had experienced some scepticism from businesses initially as they did not recognise the potential benefits of collaboration. Capacity of private sector partners to engage was also a barrier as many are micro or small independent businesses with limited staffing capacity.

Working with cultural organisations to adapt their ways of working

- A small number of examples were provided by projects of challenges that had been experienced as a result of reluctance from cultural organisations to adapt their ways of working. This included organisations' appetite to become more commercial, their capacity to attend face to face training, and difficulties organisations have in adapting to tourism timescales.

Source: SQW analysis of Cultural Destinations Fund evaluation evidence

Q3. What lessons can be learnt for how best to develop culture's contribution to tourism for key stakeholders?

8.6 At this final stage, the evidence reveals key **lessons for how best to develop culture's contribution to tourism**. The lessons build on the discussion presented for the previous two questions and are focused on **local delivery**; aimed at key stakeholders such as project leads, cultural organisations, local authorities, LEPs, DMOs, etc. Recommendations regarding programme design and policy intervention are set out in the section below.

Table 8-4: Lessons of good practice in developing culture's contribution to tourism

Lessons for local delivery
Create local networks at varying levels
Connecting partners in the cultural and tourism sectors requires networks that operate effectively at three levels: between cultural organisations, between the culture and tourism sectors and between both tourism and cultural sectors and local strategic decision-makers.
Ensure there is dedicated resource to facilitate partnerships
Partnership working across diverse and dispersed sectors requires strong leadership and networking skills. Having a dedicated (ideally neutral) role that is responsible for managing and

Lessons for local delivery
coordinating local partners; hosting regular meetings and touchpoints and keeping a focus on key priorities is essential.
Recognise the time required to develop partnerships
Partnership working also takes time to develop at a local level to understand each other's priorities, challenges, drivers and language. This time needs to be invested prior to project delivery to ensure that activities are mutually beneficial. In some areas this time has already been invested and partners are used to working with each, this will move to delivery faster than in other areas.
Engage the private sector through business representative organisations
Working with local business representative organisations, such as BIDs, is an effective way of securing engagement from the private sector and to identify opportunities for mutually beneficial collaborations.
Implement regular communications with strategic decision-makers
Exposure to and regular touchpoints with strategic decision-makers is important in raising and maintaining awareness of the project outcomes, and the value of the cultural and tourism sectors to the local economy.
Research and understand the target market/s
Cultural destinations need to understand their visitor markets. Partnerships that have undertaken visitor and audience research on cultural products/events have found it valuable. Partners need to be able to respond flexibly to ensure that project delivery/activities align with their evidence base.
Implement/commission an evaluation at the start of project delivery
Creating and sustaining local partnerships requires time and energy and partners need to understand what difference they are making. Local partnerships should commission **impact evaluation** research from the start to ensure there is consensus among key stakeholders regarding their success measures, and to implement relevant data collection mechanisms to better evidence their collective impact.

Source: SQW

Overall reflections and recommendations

8.7 The Cultural Destinations Fund programme aims to support the positioning of culture as a prominent part of the local visitor offer to drive the growth of the visitor economy, and to build partnership capacity in the cultural and tourism sectors.

8.8 **Effective local actions to build networks and partnerships:** the evaluation evidence indicates that significant progress has been made in the achievement of programme outcomes, including in relation to partnership work, building capacity, and the repositioning of culture as a prominent part of the local visitor offer. For example:

- Almost all projects, both in consultations and within project documents reviewed, highlighted an increase in coordination, networking and partnership working. This was one of the projects' key successes and potentially, projects' most significant legacy.

- Over 500 organisations benefitted from training sessions across 10 projects, with over 1,200 people attending – this focused on digital skills and knowledge of tourism/the tourism sector.
- In response to the e-survey, most stakeholders responded that their area is better known for being culturally rich (52 out of 59) and that the cultural sector is recognised as a key sector in visitor economy strategies, such as Destination Management Plans (36 out of 58).

8.9 However, that achievement is not experienced to the same extent in all the project areas.

8.10 There are various **activities that have been shown to be effective in achieving these outcomes** through working together at an operational level and organically to build networks; including:

- **joint sector training/workshops**: training opportunities and/or workshops that have been jointly delivered to tourism and cultural organisations have encouraged informal networking and enabled partnerships to form. The sessions have enabled increased mutual understanding between the sectors of their operational practices and the language/terminology used.
- **increased digital capabilities and stronger online presence**: several projects have aimed to improve the digital capabilities of cultural organisations with a view to strengthening the destinations online offer. This included social media marketing campaigns and creating a central 'What's on' website/web page. Projects have observed multiple benefits from this, including increased visitor reach, improved product/cultural offer, and simplified booking systems for customers.
- **improved coordination of the visitor offer**: across various projects, partners worked together to deliver place-based marketing which presented a more joined-up and coordinated arts and cultural offer. By presenting the offers as a package, it was thought to have enhanced the local cultural offer and showcased the area as a cultural destination. This was also achieved through a central website, detailing the local visitor offer for the whole destination.

8.11 **Synergy:** the programme was set up to enable localities to develop approaches to working across the cultural and tourism sectors in ways that best suited their local contexts. Those contexts varied widely (from culturally rich urban destinations to remote rural places, from projects with a handful of partners to those embedded in multi-sector partnerships, and from new to well established). The Cultural Destinations Fund therefore facilitated a wide variety of approaches and allowed each area to develop its own plans and objectives. This bottom up and organic approach to programme design has delivered a wide range of approaches, each with its own ambitions, local objectives and deliverables. There are examples of activities that released local synergies through partnership working (for example, joint marketing campaigns delivered by a cultural consortium). However, while projects were expected to deliver certain activities, there were no set targets or benchmarks for the outputs or outcomes that projects were expected to achieve, which makes it difficult to compare performance across the projects.

8.12 **Impact on the visitor economy**: the effect on the visitor economy of participating areas has not been sufficiently well evidenced. It is likely to have been locally significant in some areas but nationally modest. This assessment is affected by three different factors. First is the timescale. For visitor numbers from outside an area to increase there is a delay between informing and inspiriting potential visitors, affecting their booking behaviour and seeing footfall. Under normal circumstances this can be measured over months or years. The second factor is that the programme was finishing under circumstances that were not normal. The COVID-19 pandemic and its associated national and regional lockdowns will have created unexpected opportunity for some areas and significant negative effects for others. Third, in order to assess the achievement of this aim, evidence, generated through robust data collection, would be required at baseline and programme completion – these mechanisms have not been implemented by the programme from its outset.

8.13 **Programme ambition**: The rationale and overall focus of the programme remains valid. For example, the alliances developed between the cultural and tourism sectors through the programme have demonstrated that funding targeted at partnership development can create the mutual symbiosis that was part of the programme rationale. The evidence suggests that while some of the outputs and outcomes are likely to have been delivered without the programme, this is only true for a proportion of the projects, and this is unlikely to have happened at the same pace and scale. The feedback from projects suggests that further work is required in some areas, particularly in engaging large, corporate tourism businesses, and that this is unlikely to happen without targeted intervention.

8.14 **Sustainability:** While elements of project delivery are being or are expected to be sustained in some project areas, this is not consistent across the projects. Building in sustainability plans from the outset could ensure a focus on delivering activities that have the potential to be sustained without continued public funding.

8.15 Drawing on the overall findings from the evaluation, the section below sets out the recommendations for Arts Council England, Visit England and visitor economy policy makers.

Recommendations for Arts Council England, Visit England and visitor economy policy makers

Programme design

- **Design interventions that bring quick wins as well as longer term benefits**

The tourism sector and the cultural sector sometimes work on different time scales to plan and implement activities or programmes. Tourism partners should be encouraged to focus on interventions with cultural partners that bring quick wins (such as domestic tourism) alongside longer term marketing strategies.

- **Create opportunities to learn from the culture sector (visitor economy policy makers)**

The Cultural Destinations Fund programme found that when people from different sectors learn together, they appreciate their counterparts' perspectives and learn their language. Tourism organisations should be encouraged to participate in knowledge exchange events alongside their cultural sector peers.

Partnership working

- **Build strategic partnerships between cultural and tourism partners**

Local partnerships need a strategic imperative to accelerate collaboration. This should be provided by national partners creating direction (through joint ambition statements) and opportunity (with shared budgets or national initiatives). For example, national initiatives, such as deals with national hotel chains to create a Cultural Concierge programme, or with rail providers to develop packages, could be adapted and developed further through local collaborations with tourism and culture partners. *Let's Create*, Arts Council England's 2020-2030 strategy, provides a framework for interventions that build strategic capacity to reach all communities.

- **Encourage learning between local partnerships**

Several partnerships developed similar outputs such as new websites, integrated booking systems or digital itineraries. Where programmes fund several partners to deliver similar activities, a discretionary fund for learning workshops should be considered. This could encourage those partners with experience of marketing, working with digital companies and DMOs to network and share their experiences and insights.

- **Support partnership creation in localities where they are not active**

Identify areas that might benefit from a more collaborative approach between culture and tourism – either because the sectors are not featured in local economic plans or because they are areas of the country that are underperforming economically and require greater attention as part of the levelling up agenda. Grants to support partnership creation, research and strategising in advance of bid development might help accelerate partnership working in these places. Interventions would be to build capacity.

- **Lever economic impact from areas where partnerships are well established**

Programmes focused on delivery should expect more from areas that have well established partnerships (those that have a strong and well developed cultural offer, are attractive to domestic tourists, and are committed to learning transfer between sectors). Interventions would promote economic growth and resilience.

Monitoring and evaluation

- **Require consistent, robust, and regular output reporting from the outset**

Reported outputs need to be reviewed against milestone plans and supportive conversations held with projects that appear to be delayed, while those projects that are achieving strong outputs should be encouraged to share any effective practice. This would address inconsistencies in project's understanding of the overall programme aims and maintain focus on delivery.

- **Build evaluation in from the start to facilitate programme-level learning**

To ensure that a consistent focus is maintained on achieving all the programme objectives, an evaluation framework that sets out the theory of change should be developed or commissioned from the start. This will support the capture of the right baseline data. It will also guide delivery agents about the data capture required both for their own local evaluation as well as a programme level evaluation.

- **Invest to capture visitor number data consistently and routinely**

Visitor data, both at a project level and in the cultural sector, has not been collected consistently and therefore it is not possible to say whether objectives have been achieved. Any future strategic intervention will need either to recognise this evidence gap or create a programme level solution that might include commissioning visitor or audience research at a programme level.

Annex A: Cultural Destinations Fund Logic model

Cultural Destinations Logic Model

Contextual conditions

Both the cultural sector and the tourism sector make important contributions to the UK economy. The economic contribution of museums, galleries, libraries and the arts was calculated to be £5.4 billion in 2014. Arts and culture is also recognised as having significant value for society, health and wellbeing and for education. The contribution of the tourism sector meanwhile was valued in 2017 as worth £126.9 billion.

There is a mutual symbiosis when both sectors work together. The relationship between culture and the visitor economy is well-evidenced and reflected in the ambitions of the 2016 Culture White Paper[1] which argues that closer linkages and partnership working between the tourism and arts and culture sector, both locally and nationally, are likely to provide a more sophisticated and coherent visitor offer and improve the visitor experience. This potential synergy will benefit tourism development, as culture is an important part of England's 'offer' to visitors. In addition, partnerships are a valuable way for the arts and cultural sector to reach new audiences, secure additional funding and address sustainability challenges. This approach was shown to be successful in the first round of the Cultural Destinations Fund.

The funding landscape is changing with new opportunities created by the UK Industrial Strategy. A Creative Industries Sector Deal was agreed by Government and the creative industries sector in 2018 to unlock growth for creative businesses (which extends beyond the cultural sector). The Government also announced in November 2018 that they will enter an official negotiation with the tourism industry for a tourism sector deal, to attract more domestic and overseas visitors and help drive economic growth.

Cultural Destinations Programme (Phase two) objectives

1) More and different types of **people experiencing the arts and culture** in local destinations in a way that contributes to the growth of the local visitor economy
2) Increased **income** leading to greater sustainability and resilience for cultural organisations and tourism businesses in local destinations
3) **Repositioning of culture** as a prominent part of the visitor offer and local economic growth plans
4) A commitment from public and private sector partners to **continue working in partnership** to support the growth of the local visitor economy through cultural tourism beyond the life of this project.

Rationale

The arts and culture sector and the tourism sector typically operate independently from one another even within the same area. By working cohesively in partnership, the two sectors will create a more sophisticated and coherent visitor offer within a defined place, attracting a greater number of visitors, and thus increase their contribution to economic growth.

Inputs

Finance
£3m funding: Arts Council England (ACE) and VisitEngland/VisitBritain (VE/VB)
Other/match funding in-kind, private sector, public sector

Expertise
ACE Project delivery team: programme management/ administration
Experience / learning from Phase One partnerships
Website / marketing expertise
Volunteers

Organisational commitment
18 consortiums/ partnerships

Activities

Programme management
Grant administration and monitoring
Development and delivery of evaluation framework

<u>Products</u>
Creating new cultural products/offers (incl. digital)
Marketing and promoting existing cultural products/offers

Partnership
Developing partnerships between culture and tourism organisations
Building capacity (e.g. training and knowledge exchange)
Creating new partnerships with local stakeholders (public and private sector)
Developing strategic contacts
Local evaluations

Immediate Outputs

<u>Programme</u>
18 CDF projects delivered, £ spent and evaluated
2x national evaluation reports

<u>Products</u>
Number of new cultural products/commissions
Number of new events / festivals
Number of marketing campaigns
- Itinerary bookings
- Website users
- Social media reach

Number of training sessions delivered/number of attendees

Partnership
Number of sustained local partnerships between cultural and tourism organisations
Number of private sector businesses engaged
% match funding secured
Number of strategic meetings (e.g. LA/LEP/CA) projects attend/are invited to

Intended outcomes

<u>Short-term outcomes</u>

Local tourism/cultural sector partner outcomes
- Improvement in partnership working between culture and tourism in CDF areas
- Increase in capacity in arts and culture organisations, particularly in knowledge of tourism and travel trade
- Increase in business engagement in local arts and culture activities/organisations
- Enhanced arts and cultural offer that is better coordinated locally
- Better understanding of what works in developing a coordinated culture and tourism offer locally

Visitor outcomes
- Increase in number of visitors and visitors with different demographic characteristics to cultural destination partners/organisations
- Increase in number of visitors from outside the project areas to CDF areas
- Increase in international visitors to CDF cultural organisations/partners

<u>Longer term outcomes</u>

Local tourism/cultural economic outcomes
- Increase in the number of staff employed at cultural organisations
- Arts and culture organisations diversify and increase their funding stream
- Sustained visitor numbers to CDF areas

Strategic outcomes
- Sustained consortia of tourism, culture and business partners to enhance partnership working across sectoral boundaries
- Increased understanding in tourism of the role and contribution of culture to the local economy among key stakeholders
- Increased engagement from cultural organisations in tourism/the visitor economy at a strategic level such as representation on LEP Boards
- Increased recognition from policy makers of the importance of culture/tourism in the economy and culture is included in local economic growth plans / LIS
- Strong emphasis on the role of culture in local Destination Management Plans

Intended impacts

- A cross sector vision and approach to culture/tourism is realised, through sustained local partnerships
- Increased resilience and financial sustainability of cultural organisations
- Public and private sector partners continue working in partnership to support the growth of the local visitor economy through cultural tourism
- The UK and specific project areas are recognised as key cultural destinations
- Arts and culture drive growth in the local visitor economy
- Arts and culture and tourism are recognised nationally and within policy as key sectors contributing to economic growth
- The arts and culture and tourism offer is enhanced in the UK

Annex B: Projects' evaluation plans

Table B-1: Project evaluation plans or completions

Project	Project end date	Evaluation plans	Internal or external	Details of the evaluation
Birmingham	March 2020	Yes	Internal	Mixed methods, including analysis of monitoring data, desk research, and project case studies.
Cheshire East Council	March 2020	Yes	External – Audience Agency	Mixed methods, formative and summative evaluation. This focuses on identifying impact using a pre and post intervention assessment. Includes a data collection framework
Creative Kernow (Cornwall)	December 2018	Yes	Internal	2017-18 programme was evaluated Final evaluation report produced by Cornwall 365, using an online survey of partners, online survey of the local tourism sector and project lead perspectives.
Coventry city of Culture	March 2020	No overall plan, although there are plans for evaluation activities; one specific project has been evaluated	Internal and external	2Tone Taxi was evaluated by BBC Coventry and Warwickshire. Further plans to undertake economic impact modelling and evaluate visitor patterns around key events. Also repeating a tourism survey (previously undertaken in 2019).
England's Creative Coast (Kent)	June 2021	Yes	External and internal	DEF evaluation will focus on outputs and outcomes in line with the programme. The project is developing a framework internally to better capture wider outcomes across the project. Perception research has also been delivered by destination research.
Halifax Culture Hub	March 2020	No formal plan, however	Internal and external	Doing a full audit with creative tourist and will use this to benchmark against.

Project	Project end date	Evaluation plans	Internal or external	Details of the evaluation
		undertaking some research		Will also draw on the Visitor Economy Report being written by Calderdale Council.
Islands' Partnership (Isles of Scilly)	December 2019	No, however intend to get feedback from partners following the project.		Also have an annual visitors survey
Lakes Culture (Kendall)	September 2018	Yes	External – Red Research	Mixed methods drawing on various visitor survey information, an audience survey and marketing/PR data.
Lincoln City Centre Partnership	March 2019	Yes	Internal	An internal evaluation of the project was produced by Lincoln BIG. Mixed methods drawing on online surveys of visitors and follow up phone interviews with sponsors and artists.
Look Sideways: East	September 2021	Yes	External	By the Audience Agency
Marketing Manchester	March 2019	Yes	External – Audience Agency, and internal	Audience agency delivery an end of project evaluation report, predominantly output focused. Marketing Manchester will monitor outcomes from April onwards.
Nottingham Contemporary	March 2019	Yes	External – Audience Agency	Output data from partners, and a visitor survey undertaken by four main partners
Pedalling Culture (Milton Keynes)	November 2019	Partial- individual elements are being evaluated but not entire project. This is to be commissioned	Internal evaluation of individual elements. Project evaluation to be commissioned externally	Reporting on outputs and outcomes from individual aspects of the project.

Project	Project end date	Evaluation plans	Internal or external	Details of the evaluation
Stoke-on-Trent Cultural Destinations Partnership	April 2020	Yes	External-Audience Agency	Mixed methods, formative and summative evaluation. This focuses on identifying impact using a pre and post intervention assessment. Includes a data collection framework
Sheffield Theatres for Sheffield Culture Consortium	March 2019	Yes	External	University of Sheffield and Sheffield Hallam University Mixed methods, summative evaluation. Drawing on quant and qual data including visitor feedback.
Bristol and Bath Cultural Destinations (West of England)	December 2019	No overall evaluation plan, individual activities/events have been evaluated	Internal	
Wakefield Cultural Consortium (Beam)	November 2020	Yes	External – Audience Agency	Mixed methods, formative and summative evaluation. This focuses on identifying impact using a pre and post intervention assessment. Includes a data collection/evaluation framework.
Woolwich	March 2020	Yes	External-Audience Agency	Mixed methods, formative and summative evaluation.

Source: Review of Cultural Destinations Fund project information

Annex C: Project document list

Table C-1: Documents received by SQW from projects

Project title	Documents List
Birmingham	Birmingham (2019) Interim Activity Report October 2019 Evaluation report, April 2020 #WhenInBrum KPIs, no date Ironbridge Projects 2018 – 2020 Activity Evidence Report, no date A Citywide Platform (joint ticketing) recommendation, 2019 A Citywide Platform Making the Case report, April 2019 Schedule 1 project management table, October 2019 Orchestre National de Lille Evaluation, no date Final activity report, outputs and evidence (Ironbridge Gorge), March 2020 Activity report form, no date Finances for SQW, April 2020
Cheshire East Council	Cheshire East Council (2017) Cultural Destinations Application The Audience Agency (2018) Cheshire Cultural Destinations: Theory of Change, Evaluation Framework Cheshire East Council (2018) Interim Report January 2018 The Audience Agency (June 2018) Year One Evaluation Report Cheshire East Council (June 2018) Slant Update Cheshire East Council (2018) Activity Report October 2018 Cheshire East Council (2019) Activity Report April 2019 Interim activity report form (including statement of income and expenditure), January 2020 Delivery plan (April – October 2019), October 2019 Interim activity report form (including statement of income and expenditure), August 2019 Final evaluation report, April 2020 Activity report form (including statement of income and expenditure), March 2020
Creative Kernow (Cornwall)	Cornwall 365, Cornwall Cultural Destination Programme 2017-2018 Cornwall 365, 2017/2018 Questionnaire (Summary of responses) Creative Kernow (2019) Activity Report January 2019 Cornwall 365 (January 2019) Final Evaluation Report Project images, no date
Coventry city of Culture	Coventry city of Culture (2017) Cultural Destinations Application BBC Coventry and Warwickshire (2018) 2Tone Taxi Evaluation Report Coventry City of Culture Trust (2018) Cultural Destinations Project Planner Coventry City of Culture Trust (2018) Interim Activity Report Form March 2018 Coventry City of Culture Trust (2018) Interim Activity Report Form July 2018 Project update, May 2020 Visitor Survey 2019 report, no date Expenditure, income, balance sheet and data monitoring, March 2020
England's Creative Coast (Kent)	destination research, Economic Impact of Tourism: South East Coast and Counties 2015 (no date) Turner Contemporary (2017) Cultural Destinations Application England's Creative Coast (2018) Activity Report 3

Project title	Documents List
	England's Creative Coast (2018) Interim Report July 2018 England's Creative Coast (2019) Draft Evaluation Framework destination research (July 2019) Perception Research England's Creative Coast Summary (no date) England's Creative Coast (2019) Interim Report March 2019 England's Creative Coast (2019) Interim Report September 2019 England's Creative Coast (2019) Activity Report October 2019 England's Creative Coast, photos of exhibition corridors, updates and rail posters; press announcement and coverage
Halifax Culture Hub	Halifax Culture Hub (2017) Cultural Destinations Application Halifax Culture Hub (2018) Interim Activity Report March 2018 Halifax Culture Hub (2018) KPI update Oct 2018 Halifax Culture Hub (2018) KPI update Nov 2018 Halifax Culture Hub (2019) Interim Activity Report January 2019 Anita Morris Associates (2019) Calderdale Cultural Destinations PR Report: Quarter four: January to March 2019 Interim Report Piece Hall Trust bank details, no date Accountants report, May 2020 Evaluation report, April 2020 Interim activity report form (including statement of income and expenditure), January 2019 Activity report form, April 2020
Islands Partnership (Isles of Scilly)	https://www.islandspartnership.co.uk/information/creative-islands/ Islands' Partnership (August 2016) Arts Council England Standard Application Form Creative Islands (February 2018) Cultural Destination Project Plan (superseded by Artistic Plan) Creative Islands (May 2018) Artistic Plan Islands' Partnership (2018) Interim Activity Report December 2018 Islands' Partnership (2018) Interim Report December 2018 Islands' Partnership, Audience Development Plan 2019-2020 (no date, draft) Project summary, no date Activity report form (including statement of income and expenditure), April 2020 Final report declaration page Project evaluation, no date
Lakes Culture (Kendal)	Lakes Culture (Kendal) (2017) Activity Report September 2017 Lakes Culture (Kendal) (2018) Activity Report February 2018 Red Research (September 2018) Final Evaluation Report Lakes Culture (Kendal) (2018) Final Activity Report October 2018
Lincoln City Centre Partnership	Lincoln BIG, Cultural Lincoln, Year 1 – Cultural Destinations Interim Activity Plan Lincoln BIG (on behalf of LCAP), Cultural Lincoln, Round 2, Work Plan and Outline of Proposed Activities Lincoln BIG (November 2017) Lincoln Knights' Trail Evaluation Report Visit Lincoln, Annual Review 2017 Lincoln City Centre Partnership (2019) Final Activity Report July 2019 Lincoln BIG (July 2019) Lincoln Knights' Trail Final Evaluation Report Auditors certification, July 2019

Project title	Documents List
Look Sideways: East	Look Sideways: East (2018) Interim Report April 2017-March 2018 Look Sideways: East (2018) Interim Activity Report March 2018 The Audience Agency (April 2018) Evaluation Summary, Phase 1 The Audience Agency, Look Sideways-East Marketing Group, April 2018 Suffolk / Norfolk County Council, Summary of Phase 1 Look Sideways East, May 2018 Suffolk / Norfolk County Council, Targets, August 2018 The Audience Agency, Evaluation (no date) Suffolk / Norfolk County Council, Summary of Phase 2 Look Sideways East, February 2019 Look Sideways: East (2019) Interim Report April 2019 Look Sideways: East (2019) Activity Report May 2019 Phase 2 Interim Evaluation Report, April 2019 New Anglia Cultural Marketing Consortium Memorandum of Understanding, August 2018
Marketing Manchester	Marketing Manchester (2017) Cultural Destinations Application The Audience Agency (2018) Greater Manchester Cultural Destinations: Theory of Change, Evaluation Framework Marketing Manchester (2018) Interim activity report form The Audience Agency (2019) Final Evaluation Report Creative Tourist (2019) Integrated Digital Engagement Analytics (draft, February 2019) Marketing Manchester (2019) Final Activity Report April 2019 Marketing Manchester (2019) Final progress report on Fam visits 2017-2019 Overview of new bookable product (Make My Manchester), no date Auditors report, April 2019 Travel trade activity 2017 – 2019, no date Visitor information summary, March 2019
Nottingham Contemporary	Nottingham Contemporary (2016) Arts Council England Standard Application Form The Audience Agency (2018) 2018 Cultural Destinations: The Grand Tour visitor survey and Economic Impact report Nottingham Contemporary (2018) Arts Council England Interim Activity Report Nottingham Contemporary (2018) Key activities, outcomes and milestones, Season 3 Nottingham Contemporary (2018) Interim Activity Report June 2018
Pedalling Culture (Milton Keynes)	Milton Keynes Council (2017) Cultural Destinations Application Milton Keynes Council (2018) Pedalling Culture Interim Report Arts and Heritage Alliance Milton Keynes (2018) Pedalling Culture: Reclaim the Redways Engagement Commissions Report Milton Keynes Council (2019) Pedalling Culture Evaluation Brief
Stoke-on-Trent Cultural Destinations Partnership	Creative Tourist (2017) Digital Engagement Map Stoke-on-Trent Cultural Destinations Partnership (2017) Cultural Destinations Application The Audience Agency (2018) Stoke-on-Trent and North Staffordshire Cultural Destinations: Interim Report – Year 1 Stoke-on-Trent Cultural Destinations Partnership (2018) Activity Report May 2018

Project title	Documents List
	Stoke-on-Trent Cultural Destinations Partnership (2019) Interim Activity Report April 2019 Activity report form (including statement of income and expenditure), May 2020
Sheffield Theatres for Sheffield Culture Consortium	Sheffield City Council (2017) STEAM Tourism Economic Impacts Sheffield Theatres for Sheffield Culture Consortium (2017) Cultural Destinations Application Sheffield Theatres for Sheffield Culture Consortium (unknown) Interim Activity Report Sheffield Theatres for Sheffield Culture Consortium (2018) Sheffield Modern 2018 Feedback Summary Sheffield Theatres for Sheffield Culture Consortium (2018) Interim Activity Report March 2018 Sheffield Theatres for Sheffield Culture Consortium, Final Activity Report (no date) Final report declaration page
Bristol and Bath Cultural Destinations (West of England)	Phase 1 Arts Council England Final Report July 2017, (SQW?) Senior Exec Briefing Paper, Bristol and Bath Cultural Destinations (no date) Stage 3 background briefing notes, Bristol and Bath Cultural Destinations (no date) Bristol and Bath Cultural Destinations (2018) Interim report January-May 2018 Bristol and Bath Cultural Destinations (2018) Interim report June 2018-April 2019 Bristol and Bath Cultural Destinations, Delivery Plan May-December (no date) Activity report form (including statement of income and expenditure), March 2020 Activity report (January 2018 – December 2019), no date
Wakefield Cultural Consortium	Beam (2016) Arts Council England Standard Application Form Beam (2018) Arts Council England Interim Report Wakefield Cultural Consortium (2018) Activity Report July 2018 The Audience Agency (2019) Wakefield Cultural Destinations Evaluation Framework 2019/20 Wakefield Cultural Consortium (2019) Activity Report April 2019 Wakefield Cultural Consortium (2019) Interim Activity Report September 2019 Yorkshire Passion Evaluation, no date Interim activity report form (including statement of income and expenditure), January 2020 Interim report budget and cashflow, January 2020 Experience Wakefield Brand Guidelines, July 2019 Yorkshire Passion PR coverage, no date (coverage in June and July 2019)
Woolwich	Woolwich Cultural Destinations, Year 1 Report, Visit Greenwich Cultural Destinations Woolwich – milestones, Visit Greenwich Woolwich DMP, Visit Greenwich Woolwich, Programme Summary 2018/9 (no date) The Audience Agency (April 2019) Evaluation Overview, Year 2 Activity report (April 2017 – March 2020), March 2020 Evaluation report (2017 – 2020), March 2020

Source: documents provided by projects to Arts Council England, October 2019 and June 2020

Annex D: Project level monitoring data

Delivery

Table D-1: Project level data against delivery outputs

Output	O1: Total match funding secured (%/amount)	O2: Number of people who have volunteered (to support the project)	O3: Number of organisations new organisations the project is working with	O4: Number of businesses/ organisations engaged by the project		
	Amount (£)	% of total project cost			Public sector	Private sector
Bristol and Bath Cultural Destinations (West of England)	54,500	26%	N/A	18	5	42
England's Creative Coast (Kent)	427,900	86%	37	17	26	116
Wakefield Cultural Consortium (Beam)	85,716	29%	N/A	13	3	55
Halifax Culture Hub	253,219	40%	N/A	125	55	425
Birmingham	3,556,850	323%	409	155	28	668

Cheshire East Council	26,250	8%	85	55	43	12
Islands' Partnership (Isles of Scilly)	62,000	38%	45	14	27	20
Woolwich	80,000	40%	50	2	1	N/A
Stoke-on-Trent Cultural Destinations Partnership	30,000	9%	178	42	70	128
Look Sideways: East (East Anglia)	120,000	29%	N/A	20	60	0
Coventry city of Culture	80,000	30%	21	24	155	61
Total	**£4,776,435**	**60% (average)**	**825**	**485**	**473**	**1527**
Number of projects this output is relevant to	**11**	**11**	**7**	**11**	**11**	**10**

Source: Monitoring workbooks provided by projects to SQW

Activities

Table D-2: Project level data against activity outputs

Output	O5: Number of events delivered	O6: Number of marketing/ advertising/	O7: Number of people reached by marketing campaign/ promotions	O8: Number of training sessions delivered by the project (to whom)	O9: Number of people who attended the training delivered	O10: Number of reflective learning or

	(including festivals)	promotional campaigns					by the project (by organisation and by person)		evaluation workshops / events delivered by the project
			Online/ social media	Other forms of publication	Cultural orgs	Other training recipients	Number of orgs	Number of people	
Bristol and Bath Cultural Destinations (West of England)	N/A	1	1,333,631	N/A	10	0	33	52	1
England's Creative Coast (Kent)	7	2	972,998	187,188	4	0	80	82	1
Wakefield Cultural Consortium (Beam)	1	3	1,085,692	207,246	38	17	49	271	N/A
Halifax Culture Hub	1	25	181,064	252,680,078	8	8	77	380	18
Birmingham	2,247	42	4,606,370	32,681,253	32	26	120	226	42
Cheshire East Council	N/A	3	896,831	48,000	9	0	30	60	11
Islands' Partnership (Isles of Scilly)	162	14	N/A	N/A	3	2	30	67	N/A
Woolwich	15	12	137,400	N/A	16	N/A	54	N/A	N/A

Stoke-on-Trent Cultural Destinations Partnership	13	15	2,553,980	29,578,938	13	98	31	130	9
Look Sideways: East (East Anglia)	50	27	27,500	15,000	N/A	N/A	N/A	N/A	7
Coventry city of Culture	N/A	8	25,000	10,002	4	1	4	15	8
Total	**2,496**	**152**	**11,820,466**	**315,407,705**	**137**	**152**	**508**	**1,283**	**97**
Number of projects this output is relevant to	**8**	**11**	**10**	**8**	**10**	**9**	**10**	**9**	**8**

Source: Monitoring workbooks provided by projects to SQW

Products

Table D-3: Project level data against product outputs

Output	**O11: Website created**			**O12: Number of culture and tourism products developed (e.g. number of itineraries)**
	Website launched	Number of users	Number of page views	
Bristol and Bath Cultural Destinations (West of England)	1	21,111	36,263	8
England's Creative Coast (Kent)	1	2,634	6,609	17

Wakefield Cultural Consortium (Beam)	N/A	N/A	0	0
Halifax Culture Hub	N/A	N/A	N/A	40
Birmingham	4	3,785	13,156	20
Cheshire East Council	N/A	37,012	26,058	36
Islands' Partnership (Isles of Scilly)	1	N/A	N/A	0
Woolwich	1	16,772	21,800	N/A
Stoke-on-Trent Cultural Destinations Partnership	N/A	N/A	N/A	8
Look Sideways: East (East Anglia)	1	N/A	N/A	30
Coventry city of Culture	N/A	N/A	N/A	12
Total	**9**	**81,314**	**103,886**	**171**
Number of projects this output is relevant to	**6**	**5**	**6**	**10**

Source: Monitoring workbooks provided by projects to SQW

Visitors

Table D-4: Project level data against visitor outputs

Output	O13: Total number of visitors to cultural destination partners/ organisations	O14: Number of UK visitors from outside the project area to cultural organisations/ partners	O15: Number of international visitors to cultural organisations/ partners	O16: Total visitor spend at Cultural Destinations Fund businesses/ partners (£)	O17: Number of visitor overnight stays in the project area	O18: Number of visitors whose primary reason for coming to the area was to attend cultural organisations/ events	O19: % of visitors who were satisfied or highly satisfied with their experience
Bristol and Bath Cultural Destinations (West of England)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
England's Creative Coast (Kent)	2,380,071	N/A	N/A	N/A	N/A	N/A	N/A
Wakefield Cultural Consortium (Beam)	13,126,882	N/A	N/A	N/A	N/A	N/A	N/A
Halifax Culture Hub	N/A	N/A	N/A	N/A	300,000	N/A	94
Birmingham	43,826	15,498	592	625,696	3,603	26,193	98
Cheshire East Council	N/A	N/A	N/A	N/A	N/A	N/A	97
Islands' Partnership (Isles of Scilly)	N/A	N/A	N/A	N/A	N/A	N/A	100
Woolwich	58,000	40,320	1,680	995,400	64,000	25,200	100
Stoke-on-Trent Cultural Destinations Partnership	3,446,104	563,438	N/A	9,355,050	61,243	N/A	97
Look Sideways: East (East Anglia)	2,000,000	250,000	N/A	N/A	N/A	N/A	N/A

Output	O13: Total number of visitors to cultural destination partners/ organisations	O14: Number of UK visitors from outside the project area to cultural organisations/ partners	O15: Number of international visitors to cultural organisations/ partners	O16: Total visitor spend at Cultural Destinations Fund businesses/ partners (£)	O17: Number of visitor overnight stays in the project area	O18: Number of visitors whose primary reason for coming to the area was to attend cultural organisations/ events	O19: % of visitors who were satisfied or highly satisfied with their experience
Coventry city of Culture	N/A	N/A	N/A	N/A	N/A	N/A	46
Total	**21,054,883**	**869,256**	**2,272**	**10,976,146**	**428,846**	**51,393**	**90% (average)**
Number of projects this output is relevant to	**6**	**4**	**2**	**3**	**4**	**2**	**7**

Source: Monitoring workbooks provided by projects to SQW

Other outputs

Table D-5: Project level data against project specific outputs

Output	Total income in the period (£)	Total spend in the period (£)	No. of shuttle bus users	Change in perception of place	Number of partnerships built between tourism and cultural organisations (facilitated by the project)	Number of partnerships brokered/ galvanised through project activity
Birmingham	880,000.14	952,885.11	2,952	N/A	N/A	N/A
Cheshire East Council	N/A	N/A	N/A	N/A	55	N/A
Islands' Partnership (Isles of Scilly)	N/A	N/A	N/A	N/A	N/A	11

Output	Total income in the period (£)	Total spend in the period (£)	No. of shuttle bus users	Change in perception of place	Number of partnerships built between tourism and cultural organisations (facilitated by the project)	Number of partnerships brokered/ galvanised through project activity
Stoke-on-Trent Cultural Destinations Partnership	N/A	N/A	N/A	30%	N/A	N/A
Coventry city of Culture	N/A	N/A	N/A	N/A	N/A	N/A
Total	**£880,000**	**£952,885**	**2,952**	**30%**	**55**	**11**
Number of projects this output is relevant to	**1**	**1**	**1**	**1**	**1**	**0**

Source: Monitoring workbooks provided by projects to SQW

Annex E: Evidence of changes in visitor behaviour

Table E-1: Evidence of changes in visitor behaviour

Visitor expenditure	Overnight stays and duration of stay	Cultural visitors and visitor satisfaction
• **Only two projects reported data on total visitor spend at Cultural Destination Fund businesses and partners.** As baseline data was not collected, it is unclear whether expenditure in these areas has changed. **Visitor expenditure was reported as £10.9m** across the lifetime of the programme. The majority of this figure (£9.3m) was reported by one project, covering the period from April 2017 to March 2020. The other two projects reported a total of £1.6m of visitor expenditure. • Based on surveys undertaken locally, two projects (which did not provide visitor expenditure data) described in the consultations that visitor expenditure per day in the area has increased substantially; this was between £20 and £50 (and for one project, 7.2 per cent).	• In July 2020, **four projects reported overnight visitor stays** in the project area **which totalled 428k**; this is an increase of 64k from August 2019 (reported by four projects). However, the data reported by projects covers different periods and activities. For instance, for one project, the data covers the 2017 period only; for another, the data relates to only one festival; and for a third, the data covers one hotel in 2019-20. • In the consultations, one project said that overnight stays were increasing in the project area, and the cost to stay overnight was increasing; however, this was not directly attributable to the Cultural Destinations Fund project. Another project lead said that visitors are staying for a longer duration at the destination, visiting two attractions rather than one.	• **Two projects reported figures for the number of visitors whose primary reason for coming to the area was to attend cultural organisations/events**; to July 2020, **this totalled 51.4k**. This is an increase of 35k since August 2019. • In the consultations, two projects stated that there is some anecdotal evidence of visitors attending the area for culture, including to cultural organisations, and that progress is being made in reframing the area as a cultural destination. • Four projects said the outcome was not considered to be relevant for the project or it is not possible to collect evidence of the outcome. • **Two projects noted how visitors are now exploring a wider range of areas in the project destination**; beyond the city centre, for example. For one project, it was described that this was the focus of their activities, to "*move away from hot spots*"; changing visitor types, in contrast, was considered to be beyond the scope of the particular project.

Source: SQW analysis of project lead consultations

Annex F: E-survey methodology and results

Context

F.1 As part of the Cultural Destinations Fund (phase 2) evaluation, an e-survey was used to gather feedback and perspectives from a range of stakeholders across the Cultural Destinations Fund programme's areas.

F.2 The aim of the e-survey was to assess the impact of the Cultural Destination Fund programme on local partnerships and to understand the extent to which the perception of culture has changed locally. The survey explored key themes including:

- the engagement of businesses in local arts and culture
- changes in partnership arrangements in CDF areas
- changes in the perception of culture/tourism and its value to the economy
- the engagement of culture and tourism partnerships in broader economic development activities and partnerships (for example, led by LEPs).

F.3 The survey sought to gather perspectives from a broad range of local stakeholders, with projects asked to provide a list of contacts against the list outlined in Table F-1. Stakeholder contacts provided by projects were emailed a link to complete the survey.

Table F-1: Stakeholder participant list

Economic development representatives from:	Tourism sector representatives from:	Cultural sector representatives from:	Strategic policy or decision makers from:
• Combined authority • Local authority • Local Enterprise Partnership (LEP) • Private sector	• Combined authority • Local authority • LEP • Destination Management Organisation (DMO) • Business Improvement District (BID) or other local business groups • Other formal tourism sector groups	• Combined authority • Local authority • LEP • DMO • BID or other local business groups • Other formal cultural sector groups	• Combined authority • Local authority • Local Enterprise Partnership (LEP) • Other strategic groups/ partnerships

Source: SQW

F.4 The survey was delivered using Smart Survey software and was open for one month in September/October 2020.

F.5 In total, **59 responses** were collected and analysed **across 14 of the Cultural Destinations Fund projects**.

Question responses

About you

Q2. Please select the type of organisation you work for:

Table F-2: Q2. Please select the type of organisation you work for:

Row Labels	Count	%
ACE funded organisation (e.g. Bridge / NPO)	17	29
Private business (culture)	8	14
Local authority	8	14
Private business (other)	5	8
Other - strategic group/partnership	4	7
Private business (tourism)	4	7
Destination Management Organisation	4	7
Charity	3	5
Private business/charity	1	2
Business Improvement District	1	2
Combined authority	1	2
Local Enterprise Partnership	1	2
University	1	2
Charitable arts organisation who are an ACE NPO	1	2
Total	**59**	**100**

Source: CDF stakeholder survey

Q3. Please select the main sector or policy area you work in:

Table F-3: Q3. Please select the main sector or policy area you work in:

Row Labels	Count	%
Culture	39	66
Tourism	11	19
Economic development	4	7
Place Management	1	2
Retail	1	2
Culture, Economic Development	1	2
Transport	1	2
I am a resident	1	2
Total	**59**	**100**

Source: CDF stakeholder survey

Q4. Please select which Cultural Destinations Fund partnership you have links with:

Table F-4: Q4. Please select which Cultural Destinations Fund partnership you have links with:

Row Labels	Count	%
Kent	11	19
Woolwich	9	15
Halifax / Calderdale	8	14
Wakefield	8	14
Cornwall	6	10
Bristol / Bath	3	5
Sheffield	3	5
Milton Keynes	2	3
East Anglia	2	3
Isle of Scilly	2	3
Nottingham	1	2
Stoke-on-Trent	1	2
Manchester	1	2
Birmingham	1	2
No response	1	2
Total	**59**	**100**

Source: CDF stakeholder survey

Q5. Please select which of the following statements best describes your / your organisations' involvement with the local Cultural Destinations Fund programme:

Table F-5: Q5. Please select which of the following statements best describes your / your organisations' involvement with the local Cultural Destinations Fund programme:

Row Labels	Count	%
I have been directly involved in the project as a partner/partner organisation	36	61
I have been involved informally through meetings, joint promotions/activities, etc.	10	17
I have been directly involved in the project as a lead/lead organisation	7	12
I have not had any specific involvement	4	7
Local programme evaluator	1	2
Directly involved - Supported with delivery	1	2
Total	**59**	**100**

Source: CDF stakeholder survey

Perception of culture and tourism

Q6. Thinking about trends since 2017, to what extent do you agree with the following statements…

Table F-6: Q6. Thinking about trends since 2017, to what extent do you agree with the following statements…

	Completely agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Completely disagree	No response	Total
my area is better-known for being culturally rich	13	39	6	1	0	0	**59**
my area is better-known as a tourism/leisure destination	16	21	12	8	1	1	**59**
the local cultural attractions are increasingly viewed as an important part of the area's appeal to visitors	32	22	3	1	0	1	**59**
there is greater recognition of the cultural sector's contribution to the local economy	23	28	6	2	0	0	**59**
there is greater recognition of the tourism sector's contribution to the local economy	28	16	13	2	0	0	**59**
the cultural sector supports a higher number of jobs locally	15	26	13	4	1	0	**59**
the tourism sector supports a higher number of jobs locally	14	21	20	3	1	0	**59**

Source: CDF stakeholder survey

Q7. Please use the space below to provide any additional information or examples in relation to your responses. *(13 qualitative responses)*

F.6 Additional responses related to pre-March 2019 included:

- "generally the cultural agenda has a higher profile"
- "the number of people in culture base jobs has stayed the same, but we are better known and recognised as such"
- the Cultural Destinations project has had some influence on the involvement of the cultural sector in the process of the Council establishing a new Place Brand and board to oversee the strategic direction of tourism, with culture being represented on the board and the project raising the need for a coherent approach to promoting the district

- "We would support a continued refocusing of our tourism industry towards cultural tourism" due to the market being "oversaturated"
- "Cultural providers fail to plan in advance and have little or no understanding of the tourism process" – there is a lack of "joined-upness" prevalent in both sectors

F.7 Although the survey asked about pre-March 2020, five respondents added comments on the impact the COVID-19 pandemic has had (and will continue to have) on culture and tourism in their area, particularly with reference to jobs (as furlough finishes) and visitors (with the end of the season).

Engagement of culture in local economic development

Q8. To what extent is the cultural sector recognised in the following policies/strategies in your local area:

Table F-7: Q8. To what extent is the cultural sector recognised in the following policies/strategies in your local area:

	Destination Management Plans	Local Industrial Strategy	Regeneration Strategy	Skills strategy	Local economic growth plans (e.g. produced by the LEP)	Other policy/strategy (please specify - see Table 9)
The cultural sector is recognised as a key sector	36	8	26	20	25	5
The cultural sector is referenced in various places	8	18	10	12	14	2
There is some reference to the cultural sector – but it is minimal	2	7	4	6	2	5
The cultural sector is not recognised	0	1	2	3	2	0
I am not sure / not applicable	11	24	15	17	16	31
Other (please specify – see Table 9)	1	1	0	0	0	0
No response	1	0	2	1	0	16
Total	**59**	**59**	**59**	**59**	**59**	**59**

Source: CDF stakeholder survey

Q8. Comments - please provide any further detail to explain your answer: *(12 qualitative responses)*

F.8 Other policies/strategies in which the cultural sector is recognised as a key sector included a Local Cultural Strategy, COVID Economic Recovery Plan/Business Recovery Plan/Renewal Action Plan (2 responses), local neighbourhood plans, and a regional Creative Manifesto.

F.9 Another policy/strategy with minimal reference to the cultural sector was a 'One City Plan'.

F.10 Other comments included:

- "it is definitely getting more recognition. There are however so many groups and bodies and individuals that it often gets to be a talking shop with a remit too big to achieve"
- "The Council has now recruited external consultants to review the tourism sector (included culture) and will undertake consultation with the sector on direction of tourism. This research will have access to research commissioned through CD which will be useful. Culture is now seen as a key component of the area's plans but as always more work to do to fully integrate and demonstrate impact etc. CD has contributed towards raising awareness within the Council of the role culture plays in tourism and economy."
- "The local council's interest and role in supporting culture has changed considerably since we started the project. I would imagine that culture does play a large role in the DMO and industrial strategy however there is not a clear policy of consultation and joint working that would enable me to know that for certain."

Partnership working

Q9 and 10. Thinking about trends since 2017, to what extent do you agree with the following statements…

Table F-8: Q9 and 10. Thinking about trends since 2017, to what extent do you agree with the following statements…

	Completely agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Completely disagree	I am not sure / not applicable	No response	Total
partnership work between cultural and tourism organisations has increased	34	19	1	2	0	3	0	**59**
formal partnership structures have been put in place between culture and tourism	16	20	9	7	1	6	0	**59**

	Completely agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Completely disagree	I am not sure / not applicable	No response	Total
existing formal partnership structures between culture and tourism have been strengthened	26	14	10	2	2	5	0	**59**
there is increased engagement from local businesses in local arts and culture activities /organisations (e.g. joint promotional activities, events, etc.)	20	24	7	3	1	4	0	**59**
communication between culture and tourism organisations/ stakeholders has improved	21	24	7	2	1	4	0	**59**
tourism organisations have a greater understanding of the cultural sector and how it operates	10	34	4	6	1	2	2	**59**
cultural organisations have a greater understanding of the tourism sector and how it operates	11	36	3	3	2	2	2	**59**
the culture and tourism visitor offer is more joined up/coordinated locally	12	35	6	2	1	1	2	**59**
there is appropriate representation of the cultural sector on local economic development partnerships/ boards (e.g. those led by the LEP/local authority/ combined authority)	11	16	9	8	1	11	3	**59**
there is appropriate representation of the tourism sector on local economic development partnerships/ boards (e.g. those led by the LEP/local authority/ combined authority)	9	17	9	7	0	15	2	**59**

Source: CDF stakeholder survey

Q9 and 10. Comments - please provide any further detail to explain your answer: *(20 qualitative responses from 14 individual respondents)*

F.11 As a result of the Cultural Destinations Fund projects, respondents identified the following outcomes related to partnership working:

- Better integration of the cultural and tourism sectors with shared initiatives (three responses)
- Relationships between cultural organisations being strengthened (two responses), and improved relationships between cultural organisations and DMOs (one response)
- Local businesses more aware of the benefits of culture
- Communication with the cultural sector being improved
- Improved links with other local areas

F.12 Several responses noted that positive outcomes were not fully attributable to the Cultural Destinations Fund project due to strong partnership working among key stakeholders predating the project or developing separately alongside it.

F.13 Areas where further work was still needed included:

- Ensuring partnerships are inclusive (two responses) and cultural organisations are not isolated from the wider business or local community
- Ensuring sufficient capacity and knowledge of tourism product development and marketing to ensure targets and timings are realistic
- Ensuring work is sustained and further work is done
- Improving engagement between the cultural sector and the tourism sector to build on the new networks that have been formed (three responses)

Other changes in culture and tourism

Q11. Are you aware of factors, other than the Cultural Destinations Fund programme, that have influenced how the culture and tourism sectors work together to promote the area?

Table F-9: Q11. Are you aware of factors, other than the Cultural Destinations Fund programme, that have influenced how the culture and tourism sectors work together to promote the area?

Row Labels	Count	%
Yes	34	58
No	15	25
Don't know	9	15

Row Labels	Count	%
No response	1	2
Total	**59**	**100**

Source: CDF stakeholder survey

Q12. Which other factors have influenced these changes (pre-March 2020)? Please select all that apply from the list below: *(routed from Q11: 43 respondents who answered 'Yes' or 'Don't know')*

Table F-10: Q12. Which other factors have influenced these changes (pre-March 2020)? Please select all that apply from the list below: ***(routed from Q11: 43 respondents who answered 'Yes' or 'Don't know')***

	No	%	Yes	%	Total	%
Increased national recognition of the culture and tourism sectors e.g. through the Creative Industries: Sector Deal and the Tourism Sector Deal	18	42	25	58	**43**	**100**
Increased recognition of the value of culture and the visitor economy locally e.g. due to a shift in political priorities	14	33	29	67	**43**	**100**
Increased local funding for cultural sector/activities	32	74	11	26	**43**	**100**
Increased joint funding opportunities for culture and tourism	28	65	15	35	**43**	**100**
A lead organisation has taken on responsibility for coordinating and facilitating partnerships locally	27	63	16	37	**43**	**100**
A lead organisation has taken on responsibility for promoting the activities and the value of the cultural sector	28	65	15	35	**43**	**100**
A lead organisation has taken on responsibility for promoting the voice and inclusion of the cultural sector	32	74	11	26	**43**	**100**
Not applicable	41	95	2	5	**43**	**100**

Source: CDF stakeholder survey

Q12. Other (please specify): (6 qualitative responses)

F.14 Other factors identified included:

- Development of a local BID, Future High Street Fund & Heritage Action Zones
- Increased partnership working across the region's Local Authorities and the Combined Authority

- Proactive approach of the local Council and partners (including cultural organisations)
- Having multiple leads which has attracted increased project funding locally (despite budget reductions at a local authority level)
- The leadership of the LEP in bringing partners together

Q13. Relative to these other factors, how influential has the Cultural Destinations Fund been in driving change? *(routed from Q11: 43 respondents who answered 'Yes' or 'Don't know')*

Table F-11: Q13. Relative to these other factors, how influential has the Cultural Destinations Fund been in driving change? *(routed from Q11: 43 respondents who answered 'Yes' or 'Don't know')*

Row Labels	Count	%
It was an important contributory factor, alongside others	34	79
It was the critical factor	5	12
Don't know	2	5
It had no influence	2	5
Total	**43**	**100**

Source: CDF stakeholder survey

Final reflections

Q14. How (if at all) do you intend to build on the Cultural Destinations Fund experience? Tick all that apply.

Table F-12: Q14. How (if at all) do you intend to build on the Cultural Destinations Fund experience? Tick all that apply.

	No	%	Yes	%	Total	%
We will continue to meet formally with the lead organisation and other stakeholders	29	49	30	51	**59**	**100**
We will continue to work with the lead organisation on future projects (on a one-to-one basis)	32	54	27	46	**59**	**100**
We will continue to work with other local organisations that we have met through Cultural Destinations Fund (on a one-to-one basis).	19	32	40	68	**59**	**100**
We will sustain the business networks we have developed over the programme into the future	27	46	32	54	**59**	**100**
We will apply the lessons we have learned from the programme to our organisation	23	39	36	61	**59**	**100**

	No	%	Yes	%	Total	%
We will create our own activities/events based on the Cultural Destinations Fund experience	34	58	25	42	**59**	**100**
Don’t know/ not sure	57	97	2	3	**59**	**100**
None of the above	57	97	2	3	**59**	**100**

Source: CDF stakeholder survey

Q14. Other (please specify): *(6 qualitative response)*

F.15 Projects were planning to sustain activity post-Cultural Destinations Fund through:

- A formal Board which would be established by the local authority to replace the Cultural Destinations Fund project board
- An informal network which will continue to meet and discuss opportunities
- Future events based on the Cultural Destinations Fund model (although this has been impacted by the COVID pandemic)
- The destination website created as part of the Cultural Destinations Fund project which would be a positive legacy of the project.

F.16 One respondent identified a lack of funding (and therefore staffing capacity to undertake a strategic role as a barrier to building on the project further.

Q15. Has your Cultural Destinations Fund partnership supported and/or influenced the local tourism and/or cultural sector response to the effects of COVID-19?

Table F-13: Q15. Has your Cultural Destinations Fund partnership supported and/or influenced the local tourism and/or cultural sector response to the effects of COVID-19?

Row Labels	Count	%
Don't know	26	44
Yes	18	31
No	13	22
No response	2	3
Total	**59**	**100**

Source: CDF stakeholder survey

Q16. If yes, please can you provide more detail below: *(14 qualitative responses)*

F.17 Ways in which local Cultural Destinations Fund partnership had supported and/or influenced the local tourism and/or cultural sectors’ response to the effects of the COVID-19 pandemic included:

- Contributing and featuring in recovery plans (e.g. for the visitor economy) – "It is only through the Cultural Destinations work could the partnership be able to fully articulate the value of culture to the tourism offer." (two responses)
- Joint marketing activity (e.g. promoting a local makers' website) (two responses)
- Developing and raising awareness of digital/online resources and events (e.g. an online platform highlighting digital cultural resources and experiences available during lockdown) which individual partners could then promote (three responses)
- General support, discussion and sharing ideas, challenges and solutions (two responses).

F.18 Two respondents also noted that their project was being reoriented due to the context or had been postponed, and that this would support renewal and recovery post-COVID.

Q17. Do you have any final comments or observations you would like to make about your experiences with the Cultural Destinations Fund programme? *(14 qualitative responses)*

F.19 Respondents added final comments which mainly related to individual enabling factors or barriers to their project. Enabling factors included:

- Meetings to bring partners together were identified as being 'really useful' to share information and network with other businesses.
- Strong engagement with regional DMOs and local authorities.
- A strong lead to move things forward and manage stakeholder involvement and expectations.
- Consistency of key stakeholders to maintain buy-in and direction.

F.20 Barriers included:

- One respondent thought the geographical coverage of their project was too large, and greater impact could have been achieved by focusing on a smaller area.
- 'Clique' behaviour, favouritism and exclusivity.
- Less strong engagement with individual tourism businesses and wider tourism organisations.
- Lack of inclusivity of smaller organisations (which could partially be overcome by taking simple steps such as holding evening meetings to allow volunteers to attend).

F.21 Three respondents noted that they would like to see the programme continue to be supported, particularly with the impact of the COVID-19 pandemic on the culture and tourism sectors. Other final reflections described the project as 'transformative', 'positive and valuable', and 'invaluable'

Annex G: List of consultees

Table G-1: List of consultees for the Cultural Destinations Fund programme final evaluation

Name	Organisation	Project
Bryony Bishop	BeeBee Communications	England's Creative Coast
Sarah Dance	Sarah Dance Associates	England's Creative Coast
Graham Whitehead	Wakefield Cultural Consortium	Wakefield Cultural Consortium (Beam)
Rebecca Wainwright	Marketing Cheshire	Cheshire East Council
Laura Johansen	Halifax Culture Hub	Halifax Culture Hub
Margaret Way	West Midlands Growth Company	Birmingham
Rebecca Maddox	Sheffield City Council	Sheffield Theatres for Sheffield Cultural Consortium
Jane Randall	Marketing Manchester	Marketing Manchester
Sue Bell	Lincoln Business Improvement Group	Lincoln City Centre Partnership
Andy Batson	Nottingham Contemporary	Nottingham Contemporary
Fiona Wotton	Cornwall 365	Creative Kernow (Cornwall)
Tamara Bedford	Islands Partnership	Islands Partnership (Isles of Scilly)
Jeremy Brown	Islands Partnership	Islands Partnership (Isles of Scilly)
Martin Poole	Go Bath Bristol	Bristol and Bath Cultural Destinations (West of England)
Jayne Knight	Suffolk County Council	Look Sideways: East (East Anglia)
Su Whiting	Visit Greenwich	Woolwich
Paul Williams	Freelancer	Stoke-on-Trent Cultural Destinations Partnership
Jacqui Ibbotson	Oxford Inspires	Coventry city of Culture

Source: SQW

SQW

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