
The Impact of Culture on Bristol

2023/24

Final Report to Bristol City Council

4 April 2025

—
BOP
Consulting

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Image: Black Cloud, Victoria Park Heather Peak and Ivan Morison © Situations

Executive Summary

Culture in Bristol has huge Social and Economic Impact

How we approach Our Research

Overview of Our Findings

Culture in Bristol has huge Social and Economic Impact

From 120,000 people celebrating African-Caribbean culture, to walking tours on Bristol's Romantic female poets, Bristol's cultural sector produced a tremendous amount of distinctive and inspiring work in 2023/24.

We surveyed 54 cultural organisations* and found:

They provided more **than 23,000 activity spaces** and **7,000 production spaces**.

Employed nearly 8,000 people in full-time, part-time and volunteer roles.

Reached audiences of 10.9 million – through a combination of in-person and digital channels.

Reduced carbon emissions by 112 tonnes.

Based on this, we estimated the total economic and social impact across the arts and cultural sector:

We have modelled city-wide economic impacts of **£892.9m***

And social impact worth **14% of the economic impact****

* This research developed a Bristol-specific definition of culture – see appendix for full definition and methodology.

*We modelled this figure based upon our survey results and a grossing-up methodology to transition to city-wide estimates.

**We replicated a methodology previously developed to estimate social impact for Bristol City Council to reach this figure.

How we approached our research

Definition:

Identification of the activities in scope for a mapping of culture in Bristol.

1

Survey:

Distribution of survey to those engaged in these activities in Bristol.

2

Modelling:

Economic and Social Impact models that combine answers to survey questions and secondary data.

3

Grossing-Up:

Estimating Economic and Social Impact across Bristol by grossing-up from the survey responses to city-wide estimates.

4

Overview of Our Findings

1

Economic Impact of Culture

- Visitor Spend of **£187.3m**
- Organisational Spend of **£261.4m**

2

Social Impact of Culture

- Local employment generated **£97.5m in social value**
- Community and wellbeing generated **£20.4m in social value**
- **£122.7m** in NHS cost reductions
- **£32k** in Reduced carbon emissions

3

Impact of Bristol City Council

- **£14.4m in wages paid** by cultural organisations supported by Bristol City Council*
- These organisations supported community and well being activities with a **social value of £5.9m**

4

Other Impact

- **50% of organisations** surveyed are supported by Bristol City Council through the Cultural Investment Programme (CIP)
- **7,700 full-time, part-time and volunteering positions** generated by cultural organisations supported by Bristol City Council**
- **Over 350,000 audience members** engaged in education and learning activities

*Organisations supported by the Cultural Investment Programme of Bristol City Council

** Rounded to nearest hundred

The Economic Impact of Culture in Bristol

Culture is an Economic Engine for Bristol

Bristol's Total Economic Impact in Numbers

Bristol City Council's Direct Economic Impact in Numbers

Economic Impact of Culture in Bristol (2023/24)

Culture is an Economic Engine for Bristol



Bristol's Total Economic Impact in Numbers

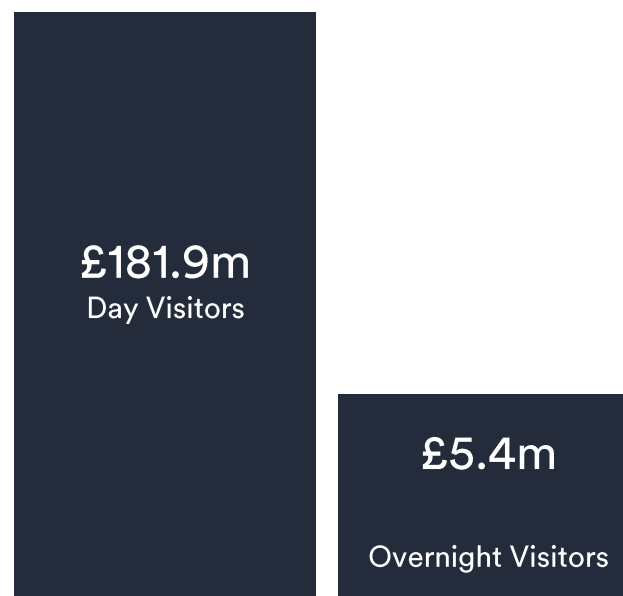
Direct Economic Impact

In 2023/24, the arts and culture sector in Bristol generated a total direct economic impact of **£448.7m**

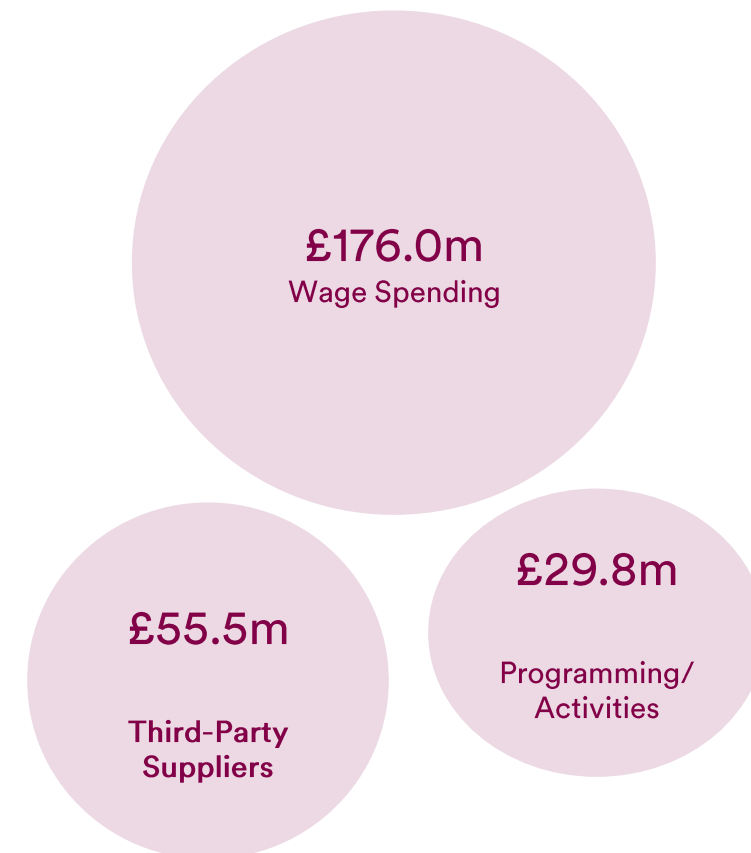
Primary SICs (Standard Industrial Classifications) accounted for **£264.1m (59%)**

The total economic impact amounts to **£892.9m** after multiplier effects

Visitor Economy



Organisational Spending



Bristol City Council's Direct Economic Impact in Numbers

Direct Economic Impact

Organisations funded by Bristol City Council generated **£41.5m** in direct economic impact

£25.6m (62%) of this comes from the Visitor Economy; **£15.8m (38%)** comes from Organisational Spending

The total economic impact amounts to **£82.5m** after multiplier effects

Visitor Economy



Organisational Spending



Economic Impact of Culture in Bristol (2023/24)

	Bristol City Council Funded Organisations	Primary SICs	Bristol-wide
Visitor Economy:			
Day Visitors	£25.3m	£167.3m	£181.9m
Overnight	£0.3m	£5.0m	£5.4m
Organisational Spending:			
Wage Spending	£14.4m	£70.6m	£176.0m
Programming/Activities	£1.1m	£10.2m	£29.8m
Third-Party Suppliers	£0.3m	£11.0m	£55.5m
Total Direct (Visitor Economy and Organisational Spending)	£41.5m	£264.1m	£448.7m
Total (After Multiplier applied to Total Direct)	£82.5m	£525.6m	£892.9m

The Social Impact of Culture in Bristol

Culture provides important Social Benefits to Bristol

Bristol's Cultural Social Impact in Numbers

Bristol City Council's Cultural Social Impact in Numbers

Social Impact of Culture in Bristol – excluding reductions in NHS costs (2023/24)

NHS cost reductions arising from culture in Bristol (2023/24)

Culture provides important Social Benefits to Bristol



Total Social Impact = 14% of Economic Impact

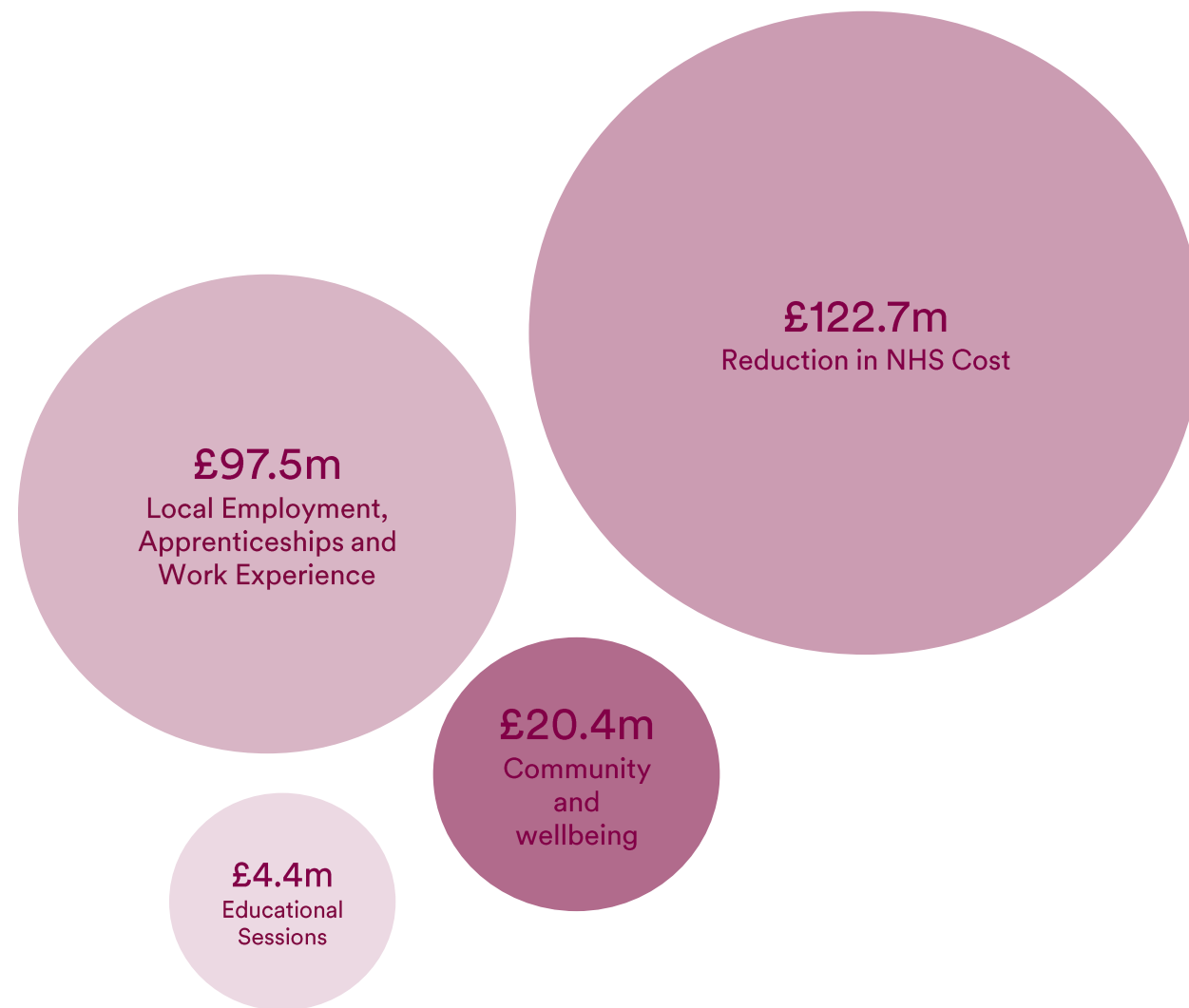
Bristol City Council Social Impact = 20% of Economic Impact

Bristol's Cultural Social Impact in Numbers*

Total social impact in monetary terms was **£122.4m** in 2023/24

Primary SICs (Standard Industrial Classifications) accounted for **£73.3m**

Additionally, total value of NHS Cost Savings was **£122.7m**



*Quantified by using the national Themes, Outcomes and Measures (TOMs) and aligning with the Bristol Social Value Policy. See appendix for more information.

Bristol City Council's Cultural Social Impact in Numbers*

Cultural organisations supported by Bristol City Council generated **£16.8m** in social impact (excluding NHS cost reductions)

£4.4m went to Tier 1 postcodes, **£6.4m** to Tier 2, and **£5.9m** to Bristol-wide measures

Additionally, total value of NHS Cost Savings was **£20.4m**



*Quantified by using the national Themes, Outcomes and Measures (TOMs) and aligning with the Bristol Social Value Policy. See appendix for more information.

Social Impact of Culture in Bristol – excluding reductions in NHS costs (2023/24)

	Bristol City Council Funded Organisations	Primary SICs	Bristol-wide
<i>Tier 1 postcodes (BS2, BS4, BS5 or BS13) measures</i>			
Educational Sessions (hrs)	£0.2m	£0.7m	£1.0m
Local Employment (no.)	£4.2m	£17.2m	£48.2m
Apprenticeships and Work Experience (weeks)	£0.03m	£0.2m	£0.3m
<i>Tier 2 postcodes (BS1, BS3, BS6-12 or BS14-16) measures</i>			
Educational Sessions (hrs)	£0.2m	£2.5m	£3.4m
Local Employment (no.)	£6.2m	£32.6m	£48.7m
Apprenticeships and Work Experience (weeks)	£0.01m	£0.03m	£0.4m
<i>Bristol-wide measures</i>			
Community Building & Wellbeing (£)	£5.9m	£20.0m	£20.4m
Total	£16.8m	£73.3m	£122.4m
Total as percentage of Economic Impact	20%	14%	14%

NHS cost reductions arising from culture in Bristol (2023/24)

	Bristol City Council Funded Organisations	Primary SICs	Bristol-wide
Reductions in GP visits	£8.7m	£45.3m	£52.2m
Reductions in mental health service usage	£11.7m	£61.2m	£70.5m
Total	£20.4m	£106.5m	£122.7m
Total as percentage of economic impact	25%	20%	14%

Other Results on Culture in Bristol

What drives the Economic and Social Value of Culture in Bristol?

Surveyed organisations receive income through various sources totalling £84 million

The surveyed organisations collectively offer over 23,000 Activity Spaces and 7,000 Production Spaces

The Cultural Sector generates significant Employment and Volunteering Opportunities for individuals both within and outside of Bristol

Surveyed organisations employ various channels to deliver cultural activities, reaching over 10 million audiences across different types of activities

Surveyed organisations engaged more than 350,000 audience members in education and learning activities in 2023/24 across varying age levels

Surveyed organisations are taking various environmental actions, showing progress in sustainability with room for further improvement

What drives the Economic and Social Value of Culture in Bristol?

Investing

“We have installed a professional audio setup and refined our already existing lighting and projection equipment. From this we have platformed emerging artists.”

Becoming more inclusive

“We made huge improvements to our accessibility which paid off with a great satisfaction rating by those attendees in our post event survey.”

Delivering large scale events

“The festival was a huge success with over 200,000 visitors estimated to attend, up to 100 traders and exhibitors, new sponsors and activations and a new creative direction was taken for the festival.”

Generating economic and social value

“For the local community, these development works will create a rise in access to high quality arts and cultural activities, create new spaces to come together and to form new connections, more spaces for local groups to run their own activities and events, and create new jobs , traineeships, and opportunities to upskill.”

Providing spaces that the public value

“The space is increasingly used by the general public on a daily basis alongside our building tenants and those attending programming.”

Building new connections and community

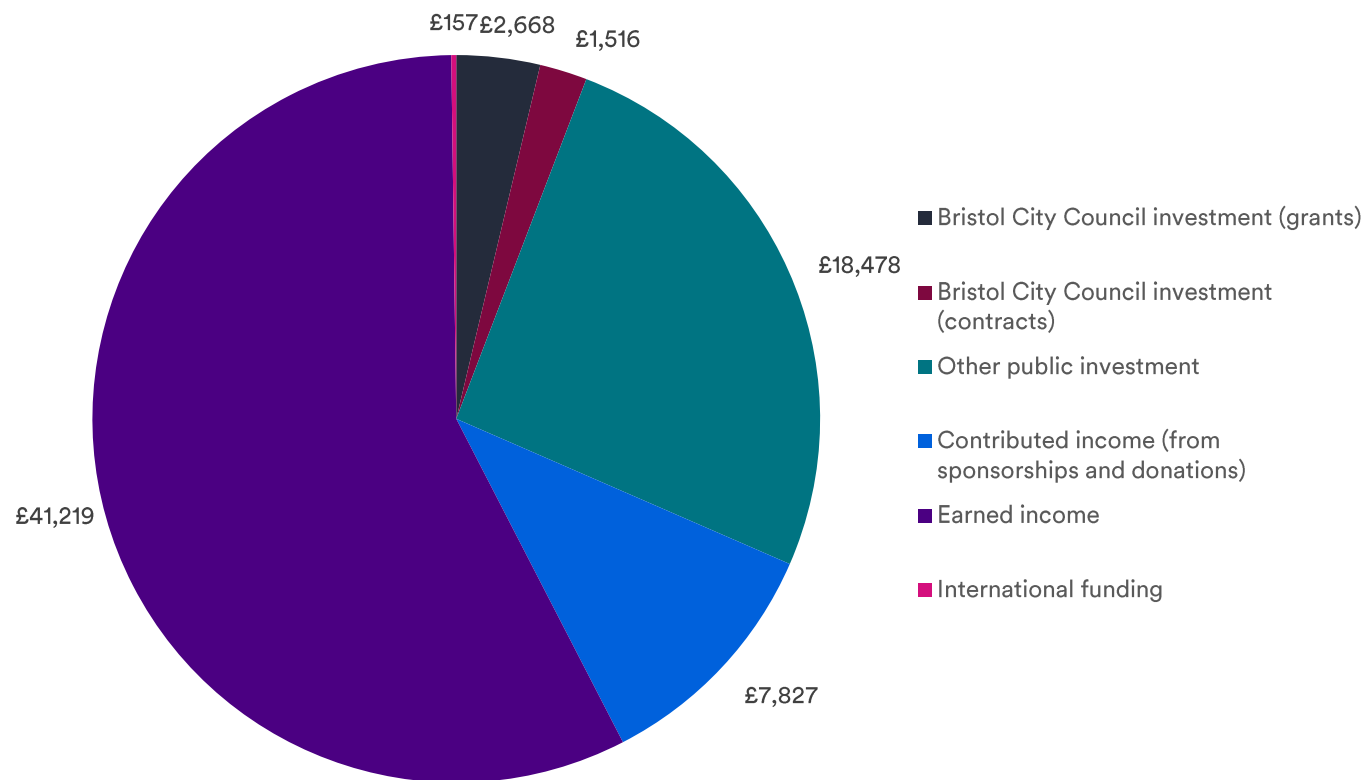
“Approximately 120,000 people from St Pauls and beyond came together to celebrate African-Caribbean culture, immerse themselves in the traditions of Carnival, and to spread the spirit of community here in Bristol.”

Surveyed organisations receive income through various sources totalling £84 million

Across the surveyed organisations, the total funding amounts to £84 million. The chart emphasizes the diverse income streams for the organisations in the survey sample.

- **Earned income** represents the largest revenue source, amounting to £41.2 million for the surveyed organisations.
- This is followed by **public investments**, which include £2.7 million and £1.5 million from Bristol City Council in grants and contracts, respectively. Additionally, a total of £18.5 million is received from other public funding sources, such as Arts Council England.
 - Organisations participating in Bristol City Council's CIP funding programme receive an extra £10.4 million from other public sources.
- **Contributed income**, comprising sponsorships and donations, totals £7.8 million.
- **International funding**, from sources like the European Union, amounts to £0.2 million.

Breakdown of income by source (£000s, 2023/24)



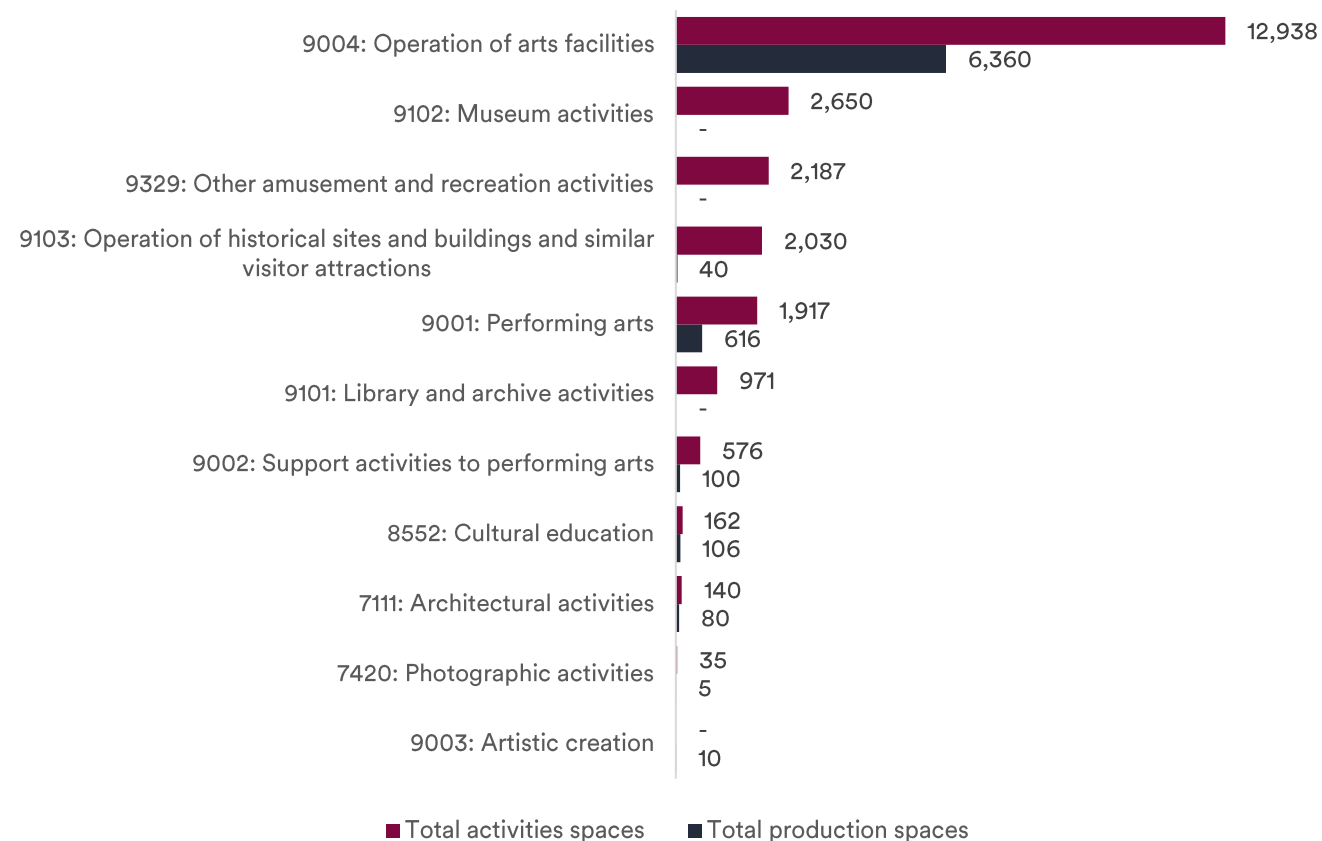
The surveyed organisations collectively offer over 23,000 Activity Spaces and 7,000 Production Spaces

Across the SIC codes:

- General arts facilities (9004) have the highest number of both cultural activity and production spaces, as many organisations fall under this SIC code.
- Museums (9102), venues for other amusement and recreation activities (9329), historical sites (9103), and libraries and archives (9101) show a significant number of activity spaces but fewer production spaces, reflecting the nature of their operations.

Further research is needed to determine if the existing cultural infrastructure adequately meets the demands of the public and creatives.

Number of cultural activities and production spaces, by SIC codes (2023/24)

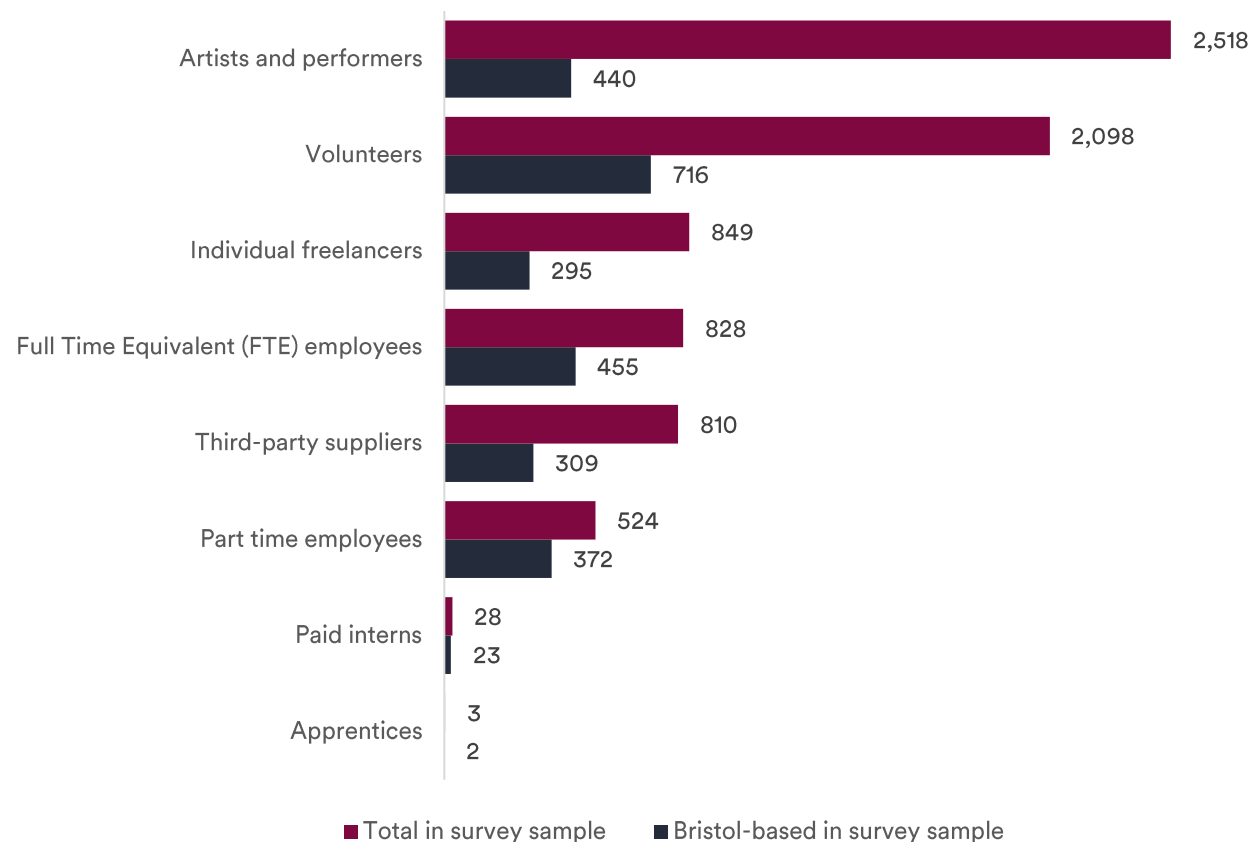


The cultural sector generates significant Employment and Volunteering Opportunities for individuals both within and outside of Bristol

The surveyed organisations support 5,560 paid full-time, part-time, and 2,098 volunteer positions.

- 455 of the 828 full-time roles are held by Bristol-based individuals, fostering local employment. 373 are based outside of Bristol.
- The sector heavily relies on part-time workers, freelancers, and third-party suppliers, reflecting flexible practices and external collaborations.
- Paid interns and apprentices are fewer, indicating limited entry-level opportunities.
- The actual proportion of Bristol-based employees and volunteers is likely higher, as many organisations did not report workforce postcodes.
- 47 (87%) of the surveyed organisations report that they pay all their staff Real Living Wage or higher, i.e. £12 per hour as of 2024.

Employment numbers by type (2023/24)

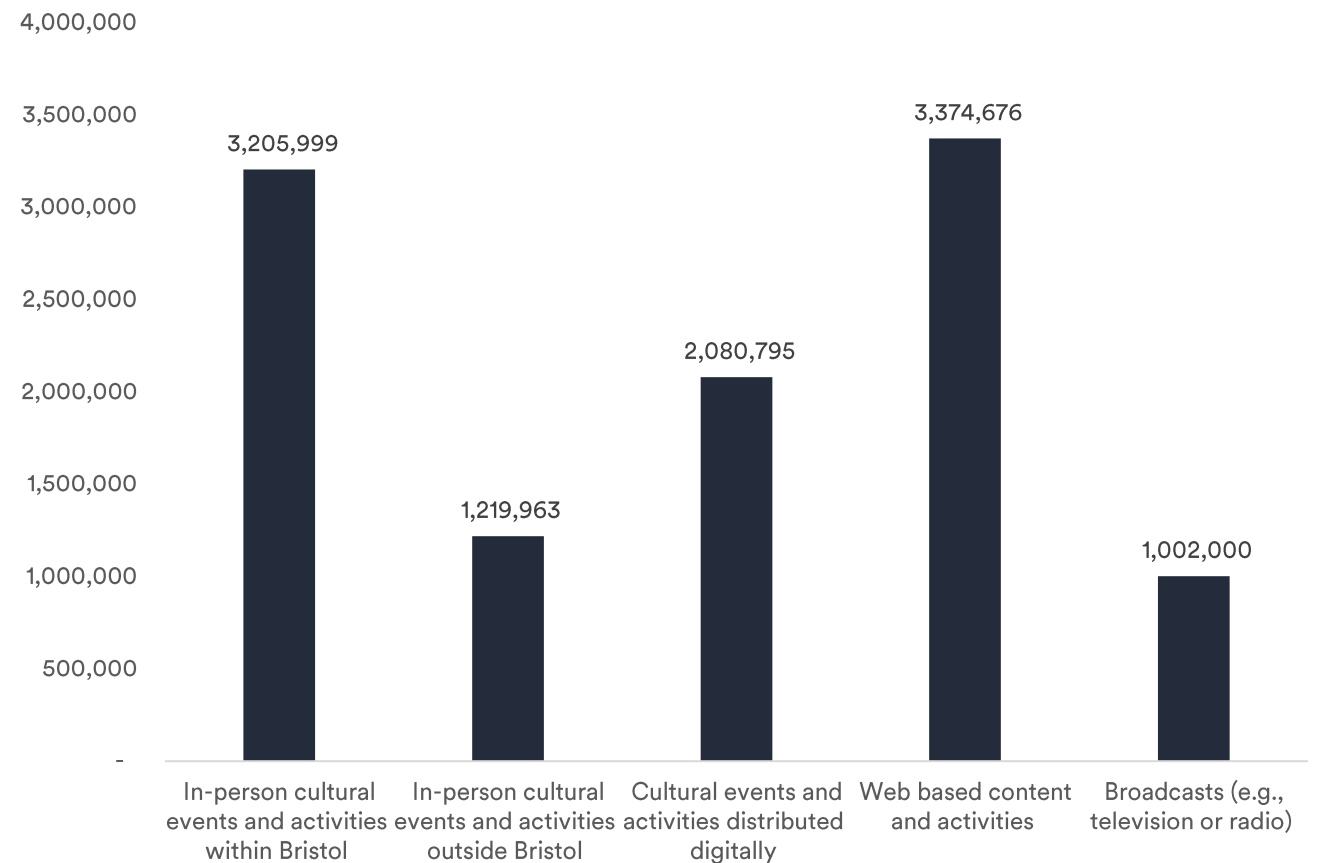


Surveyed organisations employ various channels to deliver cultural activities, reaching over 10 million audiences across different types of activities

The chart examines the total and average attendance for various cultural events delivered by organisations in the survey sample. Key findings include:

- In-person events within Bristol generate significant engagement, with an attendance of over three million in total. This is driven by the high volume of events (68,753 in total), as the average attendance (47) is the lowest among the categories available. This indicates frequent but smaller-scale activities.
- Digitally distributed (188 in total) and web-based cultural content (514 in total) also shows strong engagement, which is in line with the shift towards online participation.
- Although relatively fewer in number, broadcasted events (e.g., television or radio, 9 in total) achieve the highest average attendance per event, leveraging the broad reach of these distribution channels.

Total attendance by type of activities (2023/24)

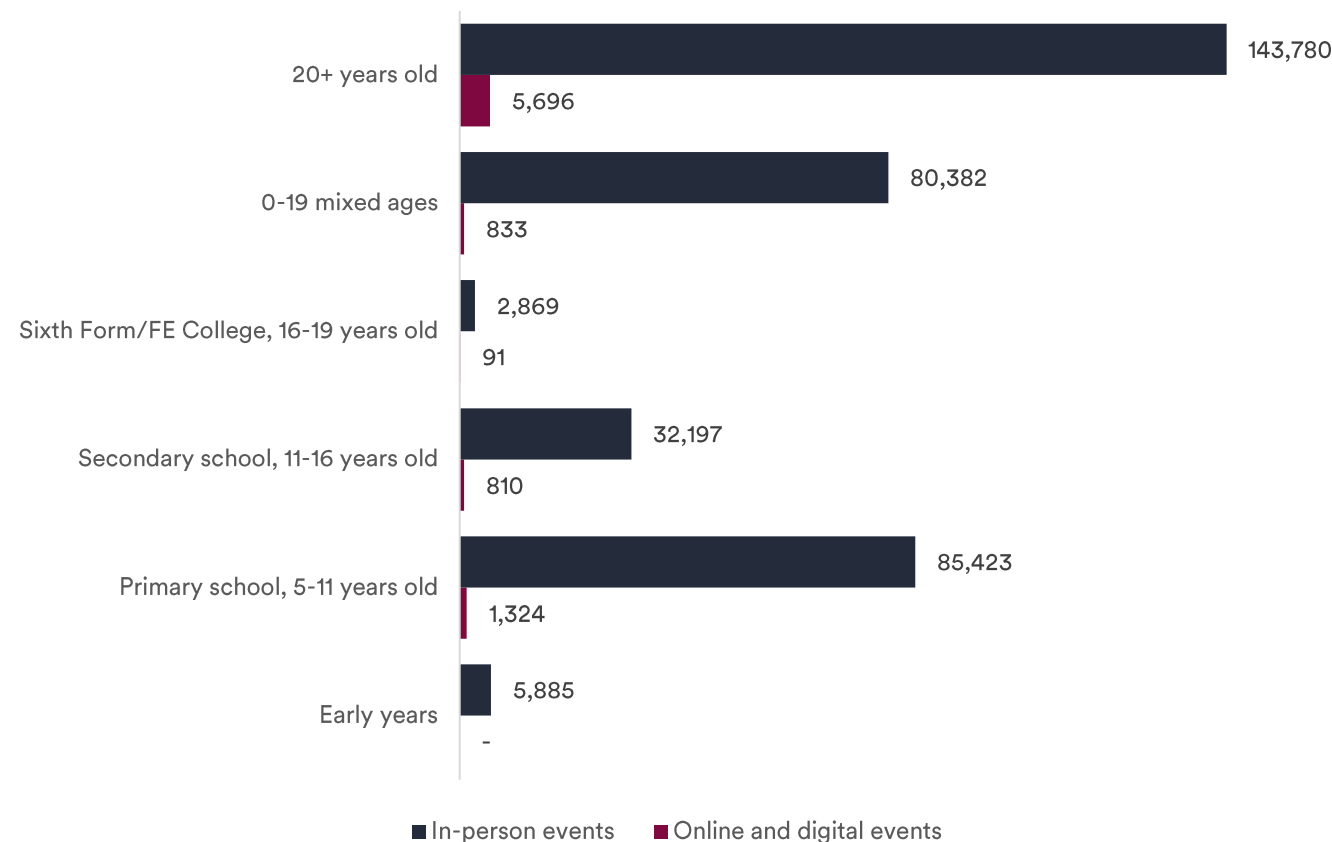


Surveyed organisations engaged more than 350,000 audience members in education and learning activities in 2023/24 across varying age levels

The chart shows attendance numbers for education engagement sessions hosted by surveyed organisations in 2023/24, categorised by targeted age groups and event types (in-person and online/digital).

- Overall, **98% of the audience participated in in-person events**, a trend consistent across all age groups.
- Notably, early years audiences showed no engagement in online and digital activities, reflecting the nature of this young demographic.
- Adult learners (20+ years old) constituted the largest audience group, accounting for over 40% of total engagement. They were followed by primary school audiences and mixed-age groups (0-19 years old).

Total attendance to education engagement sessions at surveyed organisations, by type of events (2023/24)



Surveyed organisations are taking various environmental actions, showing progress in sustainability with room for further improvement

On climate actions:

- 54% of organisations have taken steps to reduce carbon emissions, collectively cutting over 100 tonnes of CO₂.
- 25% of organisations actively track waste diversion, redirecting over 250 tonnes of hard-to-recycle waste from landfill.
- The actual impact is likely greater, as many organisations take action without formally recording their progress.

On the other hand, survey results suggest that there is room for more organisations to take up structured approaches for environmental sustainability.

- 29% of the organisations have joined Bristol City Council's One City Climate Pledge, with potential for further growth.
- 23% have a formal Carbon Reduction Plan.

Rate of engagement with actions for environmental sustainability (2023/24)



Technical Annex

Introduction to Our Economic Approach

Economic Impact of Culture in Bristol (£m, 2023/24)

Social Impacts in addition to Economic Impacts

Social Impact of Culture in Bristol – excluding reductions in NHS costs (£m, 2023/24)

NHS cost reductions arising from culture in Bristol (£m, 2023/24)

Four Phases in Our Approach

Definition of Culture in Bristol

Surveying of Bristol-based organisations engaged with activities in Definition

How Surveying relates to Economic and Social Impact Models

Overview of Economic Impact Model

Overview of Social Impact Model

Estimating social value from Survey and Social Impact Model

How we gross-up from Survey Respondents to Bristol-wide results

Introduction to Our Economic Approach

In 2023/24, the arts and culture sector in Bristol generated a total direct economic impact of £448.7m, with the primary SICs (Standard Industrial Classifications) accounting for £264.1m and organisations funded by the Cultural Investment Programme (CIP) of Bristol City Council generating £82.5m.

The primary SICs relate to those parts of the sector where the survey sample is strongest – with more than 20% of employment in the activities in Bristol accounted for by respondents to the survey.

Grossing up is the process of transitioning from estimates based on a survey sample (e.g., the 54 arts and culture organisation that responded to the Survey in Bristol) to estimates of a larger population (e.g., all activities in Bristol contained in the definition of culture applied to this study).

This process is necessary in relation to both the results on the primary SICs and the Bristol-wide results. The higher survey coverage on primary SICs gives more robustness to these results than the Bristol-wide results.

In contrast, no grossing up is applied in relation to results on Bristol City Council funded organisations. This is because all these organisations completed the Survey.

This analysis is grounded in economic impact via the Visitor Economy and Organisational Spending – but there are many other kinds of economic impact that a vibrant city culture helps to unlock, such as:

- Support for increased inward investment – as investors are attracted to locating their businesses in culturally-enriching places;
- Increased workforce participation – as cultural participation tends to improve mental wellbeing and thus, reduce absences from work associated with mental health.

These impacts are more intangible and therefore, harder to quantify – but we provide estimates of reductions in demand on the NHS in our Social Impact analysis.



Image: MAYK, SESSION by Still House, Steppaz and Empire Sounds at The Station. ©Paul Blakemore

Economic Impact of Culture in Bristol (2023/24)

	Bristol City Council Funded Organisations	Primary SICs	Bristol-wide
Visitor Economy:			
Day Visitors	£25.3m	£167.3m	£181.9m
Overnight	£0.3m	£5.0m	£5.4m
Organisational Spending:			
Wage Spending	£14.4m	£70.6m	£176.0m
Programming/Activities	£1.1m	£10.2m	£29.8m
Third-Party Suppliers	£0.3m	£11.0m	£55.5m
Total Direct (Visitor Economy and Organisational Spending)	£41.5m	£264.1m	£448.7m
Total (After Multiplier applied to Total Direct)	£82.5m	£525.6m	£892.9m

Social Impacts in addition to Economic Impacts

Spending at pubs and restaurants by visitors to cultural destinations grows markets in Bristol and thus, economic value. Social value is less usually expressed in such market transactions. For example, mental health campaigns seek to create social value by improving wellbeing, which beneficiaries do not purchase in markets.

In addition to the economic impact that we have modelled, culture generates social value in Bristol, which we have quantified by using the national Themes, Outcomes and Measures (TOMs) and aligning with the Bristol Social Value Policy.

This social value includes the delivery of education sessions and provision of employment in specific parts of Bristol, as well as enhanced community building and wellbeing across the city. The estimated monetary value of these kinds of social value, as well as our methodology for deriving these valuations, are shown on the following pages.

We conclude that these social impacts have a value across the city that equates to 14% of our estimated economic impact, totalling £122.7 million.

We extend beyond the approach previously by Bristol City Council to capture two other social impacts associated with culture*:

- Reductions in NHS expenditure due to fewer GP visits.
- Reductions in NHS expenditure due to fewer therapy visits.

We estimate that these social impacts have a value to the city again equivalent to 14% of the economic impact of culture on the city.

We present these social impact results over tables on the next two pages – following the same reporting groupings as our economic results: Bristol City Council-funded organisations, primary SICs and Bristol-wide.



* Source: Department for Digital, Culture, Media and Sport (2015) Health and educational benefits of sport and culture. Available at: https://assets.publishing.service.gov.uk/media/5a75815ee5274a1242c9ed6f/Health_and_educational_benefits_of_sport_and_culture.pdf

Social Impact of Culture in Bristol – excluding reductions in NHS costs (2023/24)

	Bristol City Council Funded Organisations	Primary SICs	Bristol-wide
<i>Tier 1 postcodes (BS2, BS4, BS5 or BS13) measures</i>			
Educational Sessions (hrs)	£0.2m	£0.7m	£1.0m
Local Employment (no.)	£4.2m	£17.2m	£48.2m
Apprenticeships and Work Experience (weeks)	£0.03m	£0.2m	£0.3m
<i>Tier 2 postcodes (BS1, BS3, BS6-12 or BS14-16) measures</i>			
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<i>Bristol-wide measures</i>			
Community Building & Wellbeing (£)	£5.9m	£20.0m	£20.4m
Total	£16.8m	£73.3m	£122.4m
Total as percentage of Economic Impact	20%	14%	14%

NHS cost reductions arising from culture in Bristol (2023/24)

	Bristol City Council Funded Organisations	Primary SICs	Bristol-wide
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Four Phases in Our Approach

Definition:

Identification of the activities in scope for a mapping of culture in Bristol.

1

Survey:

Distribution of survey to those engaged in these activities in Bristol.

2

Modelling:

Economic and Social Impact models that combine answers to survey questions and secondary data.

3

Grossing-Up:

Estimating Economic and Social Impact across Bristol by grossing-up from the survey responses to city-wide estimates.

4

Definition of Culture in Bristol

We consulted with Bristol City Council and cultural advisory group, agreeing a definition of culture in Bristol formed by the activities below:

• Circus	• Photography
• Combined Arts	• Theatre
• Crafts	• Visual Art
• Dance	• Heritage
• Design	• Museums
• Digital Arts	• Libraries and the Night-time Cultural Economy (NTCE)
• Literature / Poetry / Spoken Word	• Festivals and events (including food, excluding sport)
• Live Art	• Live music venues (NTCE)
• Music	• Nightclubs and electronic music spaces (NTCE)
	• Any combination of these art forms.

Surveying of Bristol-based organisations engaged with activities in Definition

Survey Questions

A survey was developed in partnership with Bristol City Council and its cultural advisory board, with questions related to such issues as:

- Cultural Impact
- Cultural Infrastructure
- Funding, Income and Expenditure
- Employment
- Activities and Audiences
- Education Engagement
- Environmental Sustainability
- Workforce Demographics

The survey was distributed to Bristol organisations engaged with activities in definition of culture applied to this research. Screening questions were used to identify and filter-out organisations working outside of these activities.

Survey Response

56 arts and culture organisations completed the survey. Assuming a population size of 3000 and with a 10% margin of error, this response achieves an 85% confidence level.

The margin of error measures the range within which the true value across the population is expected to fall. A smaller margin of error means more precise results. Confidence level represents the probability that the actual value falls within the margin of error.

With a chosen margin of error, the sample size required to achieve a certain confidence level can be identified by using the [sample size calculator](#).

Survey Cleaning

The Bristol City Council (BCC) hosted the survey on the Smart Survey platform, running it from November 2024 to February 2025. When the survey closed, responses were downloaded from this platform into Excel.

These responses were then cleaned by:

- Matching organisations with closest SIC codes
- Removing duplicated answers
- Removing outliers
- Extracting data from texts
- Standardising data format

This process improves data quality and, in turn, enhances the accuracy of analysis.

How Surveying relates to Economic and Social Impact Models (1/3)

Our survey includes two types of questions:

1. Questions that provide data for our Economic and Social Impact Models.
2. Questions that offer other insights into culture in Bristol.

The results from the second type of questions are shared in the section above titled 'Other Results on Culture in Bristol'. **These findings only reflect the survey respondents.**

The results from the first type of questions are used in our Economic and Social Impact Models to produce the outcomes reported in the sections called 'The Economic Impact of Culture on Bristol' and 'The Social Impact of Culture on Bristol'. **These results are presented on a city-wide scale, not just for survey respondents.**

We move from survey respondent results to city-

wide results through a process explained on the page titled 'How we gross-up from Survey Respondents to Bristol-wide results'.

Before this grossing-up process, we apply the survey responses to our Economic and Social Impact Models, as described on the following two pages.



Image: Unsplash – Nathan Riley

How Surveying relates to Economic and Social Impact Models (2/3)

Our economic model is illustrated on the page titled **'Overview of Economic Impact Model'** and measures impact through two channels: 1. Visitor Economy, and 2. Organisational Spending – Wages, Programming/Activities and Third-Party Suppliers.

The Survey collects data on visitor numbers to cultural destinations, categorised into day and overnight visitors. It also provides information on the proportion of visitor spending that occurs on-site and off-site. We focus on off-site expenditure to avoid double counting, as on-site spending is captured through the Organisational Spending channel.

The number of day and overnight visitors to cultural attractions is multiplied by their average daily spending outside the attraction. For activities with sufficient survey coverage, this spending data is taken directly from the Survey. For activities lacking adequate Survey coverage, day and overnight visit spending is assumed to be the average of other activities with sufficient coverage. Since these average figures reflect visitor spending across

organisations in the survey sample, it may overestimate spending for some destinations and underestimate it for others.

The Organisational Spending channel focuses on wages and supplier expenditure within the Bristol economy, excluding any spending that leaks outside the city. Both the Visitor Economy and Organisational Spending channels include a multiplier (based on past research for Arts Council England) to account for the ripple effects of increased spending along related supply chains (e.g., increased demand at Bristol pubs and restaurants due to cultural attraction visitors).

This analysis does not consider deadweight, which refers to visitor spending that would occur in Bristol regardless of cultural attractions. Quantifying economic metrics requires surveying cultural attendees, whereas this research is based on surveying cultural organisations. **Please see our glossary (Page 43) for clarification of technical terms used in this description.**

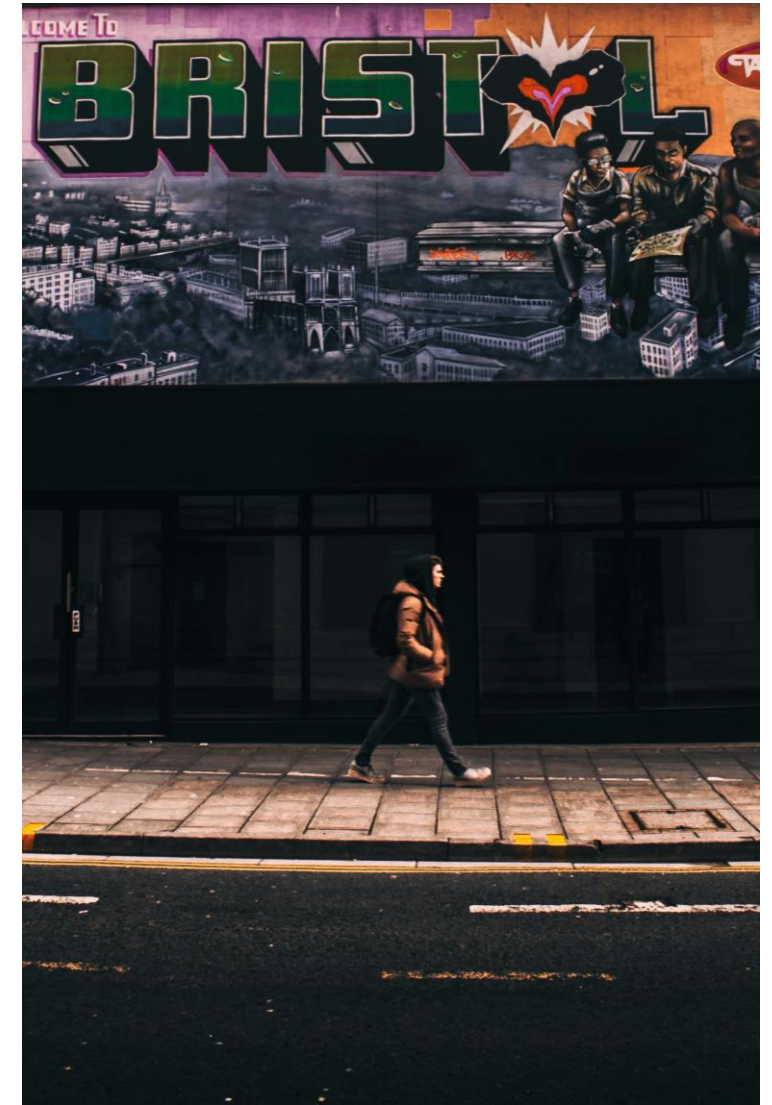


Image: Unsplash – Harry Kessell

How Surveying relates to Economic and Social Impact Models (3/3)

Our social model estimates the value generated for Bristol by culture that goes beyond the economic value measured in our Economic Model. Economic value is typically reflected in market transactions (e.g., spending at pubs and restaurants by visitors to cultural destinations), while social value is not usually captured in such transactions (e.g., mental health campaigns can enhance the wellbeing of beneficiaries without them purchasing this improvement).

This social model is illustrated on the page titled **'Overview of Social Impact Model'** and uses proxies based on the national Themes, Outcomes and Measures (TOMs), aligning with the Bristol Social Value Policy, except for two metrics related to NHS savings. The proxy values on this page provide a monetary estimate of the indicated social impacts, reflecting the average experience in Bristol.

Of course, individual experiences may differ from these proxies (e.g., some people may gain greater

wellbeing improvements from mental health campaigns than the proxy suggests, while others may see no improvement). We have expanded these proxies beyond those previously used by Bristol City Council to include two additional impacts linked to culture:

1. Reductions in NHS expenditure due to fewer GP visits.
2. Reductions in NHS expenditure due to fewer mental health service visits.

The proxy values for these social impacts are derived from research conducted by Simetrica for the Department of Culture, Media and Sport*. The process linking survey responses to the quantification of social value is further explained on the page titled 'Estimating social value from Survey and Social Impact Model'.

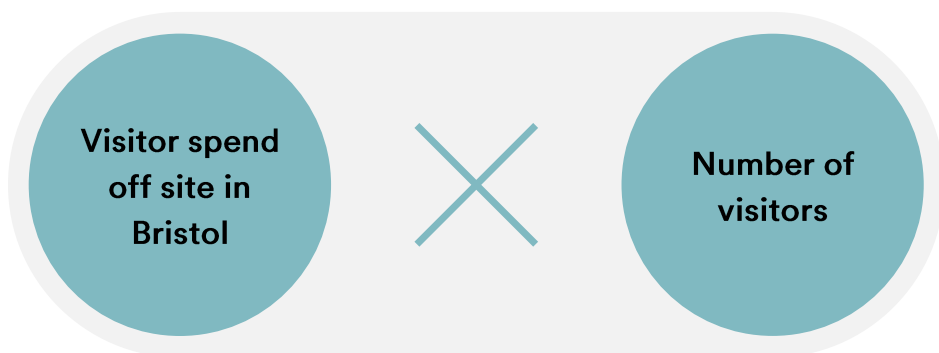


Image: Unsplash – Winston Tija

* Source: Department for Digital, Culture, Media and Sport (2015) Health and educational benefits of sport and culture. Available at: https://assets.publishing.service.gov.uk/media/5a75815ee5274a1242c9ed6f/Health_and_educational_benefits_of_sport_and_culture.pdf

Overview of Economic Impact Model

Visitor Economy

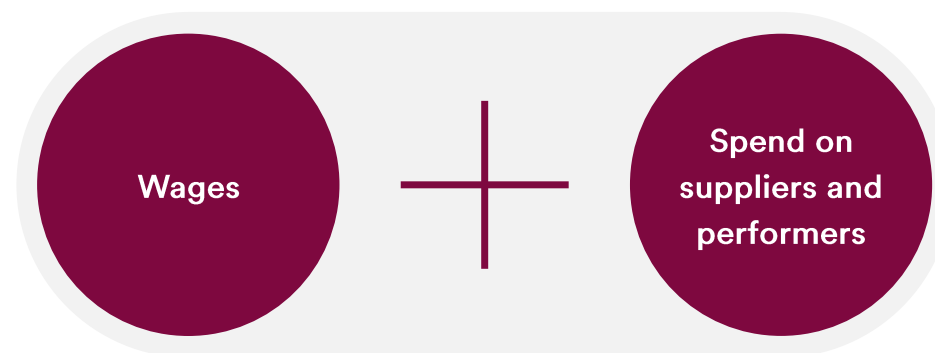


Visitor numbers broken down by day and overnight visitors

Per visit spend estimates broken down by day and overnight visitors

\times *Economic multiplier*

Organisational Spending



$-$ Supplier/performer spending paid outside Bristol

$-$ Wages paid outside Bristol

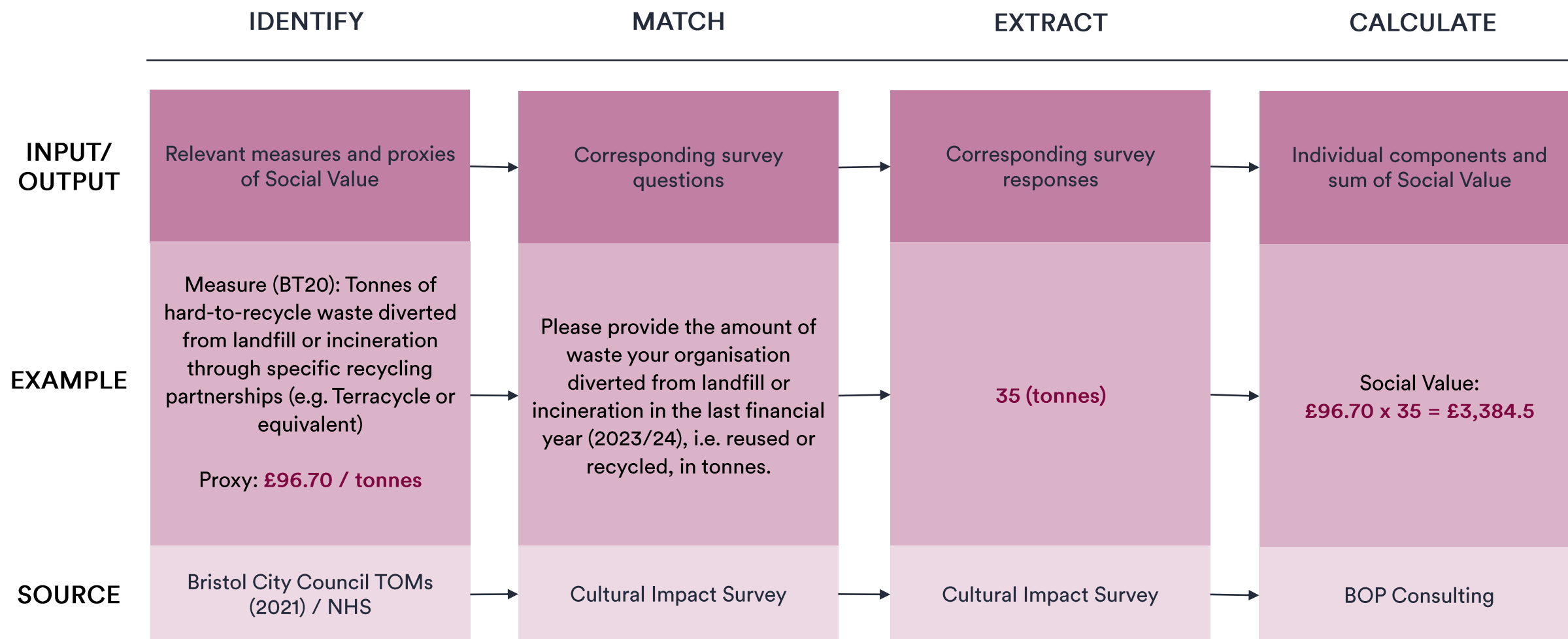
\times *Economic multiplier*

We gross-up to account for the economic impact of all cultural organisations in Bristol based upon the employment of such organisations in the city, according to Office of National Statistics (ONS) data. All data inputs to Visitor Economy and Organisational Spending derive from the Bristol Cultural Impact Survey (2023/24) and the Economic Multiplier is sourced from research for Arts Council England.

Overview of Social Impact Model

Social Impact	Measure	Proxy	Units
Educational Session (hrs)	Hours spent (including preparation time) on engagement with schools or colleges e.g. delivering careers talks, curriculum support, literacy support, safety talks	£16.09	no. staff hours
Local Employment (no.)	Total amount of time (FTE) that employees will spend working on this contract	£32,982	no. people FTE
Apprenticeships (weeks)	Total number of weeks that new apprentices will spend working on this contract	£224.07	no. weeks
Work Experience (weeks)	Weeks of meaningful work placements for local people: either 1-6 week student placements (unpaid) or longer internships (paid living wage)	£168.72	no. weeks
Employee wellbeing (£)	£ spent on mental health campaigns for people working on the contract to create community of acceptance and remove stigma around mental health	£1.00	£ spent
Waste Reduction (tonnes)	Tonnes of hard-to-recycle waste diverted from landfill or incineration through specific recycling partnerships (e.g. Terracycle or equivalent)	£96.70	tonnes
Waste Reduction (tonnes)	Tonnes of CO2e emissions avoided or sequestered (not including transport) on the contract through de-carbonisation. Transport is covered through car mile measures.	£70.43	tonnes
NHS Cost Savings (no.)	Annual NHS cost savings due to predicted reductions in GP visits	£5.07	no. audience member
NHS Cost Savings (no.)	Annual NHS cost savings due to predicted reductions in mental health service usage	£6.84	no. audience member

Estimating social value from Survey and Social Impact Model



How we gross-up from Survey Respondents to Bristol-wide results (1/2)

Grossing up is the process of transitioning from estimates based on a survey sample (e.g., the 54 arts and culture organisation that responded to the Survey in Bristol) to estimates of a larger population (e.g., all activities in Bristol contained in the definition of culture applied to this study).

We have grossed up by:

1. Mapping activities in the definition to Standard Industrial Classification (SIC) codes;
2. Assigning survey respondents to SIC codes;
3. Combining employment data from the Survey with Office of National Statistics (ONS) data on employment in these SICs in Bristol.

For example, if the combined employment of organisations within a relevant SIC sums to halve the employment assigned to this SIC in Bristol by the ONS, we double the sum of survey responses from organisations assigned to this SIC to estimate the Bristol-wide impact of this SIC. In other words, a scaling factor is used to extrapolate survey results to industry-wide estimates is based on the

ratio of local employment reported in the survey to the ONS local employment count for each SIC code.

Mapping activities in definition against SIC Codes and Survey Coverage of SICs – the page below - summarises the survey sample’s coverage of SIC codes mapped to Bristol’s culture definition. Coverage is determined by comparing local employment reported in the survey to BRES (Business Register and Employment Survey) local employment data, with BRES being a data source maintained by the Office of National Statistics (ONS). Coverage varies between SICs – as indicated on the next page (High, Low, Not Covered).

This means that SICs with lower coverage require a higher scaling factor, but the associated confidence in these estimates is also lower. Conversely, SICs with higher coverage have lower scaling factors and greater confidence in their estimated contributions.

Some SICs were grouped within our grossing-up progress to create more representative samples. For example, ‘5920: Sound recording and music publishing activities’ is matched with ‘9003: Artistic Creation’. These groupings occurred when a SIC was included within the sector definition initially established and no survey respondents assigned themselves to this SIC – but this SIC is closely related to another SIC within the definition for which survey responses were provided. The employment count from the missing SIC code is then added to the identified match to adjust the scaling factor accordingly.

For the SICs not covered by survey sample, their economic and social impact are excluded from analysis.

Mapping activities in definition against SIC Codes and Survey Coverage of SICs

SIC code and definition	Coverage
8552: Cultural education	High
9001: Performing arts	High
9004: Operation of arts facilities	High
9101: Library and archive activities	High
9102: Museum activities	High
9103: Operation of historical sites and buildings and similar visitor attractions	High
9329: Other amusement and recreation activities	High
7111: Architectural activities	Low
5914: Motion picture projection activities	Low
5920: Sound recording and music publishing activities	Low
6010: Radio broadcasting	Low

SIC code and definition	Coverage
7420: Photographic activities	Low
9003: Artistic creation	Low
3212: Manufacture of jewellery and related articles	Not covered
3220: Manufacture of musical instruments	Not covered
5811: Book publishing	Not covered
7410: Specialised design activities	Not covered
9002: Support activities to performing arts	Not covered

High: 7 SIC codes received more than 20% coverage, which are considered high coverage, and classified as **Primary SICs**.

Low: 6 SIC codes received between 0% and 20% coverage, which are considered low coverage.

Not covered: 5 SIC codes are not covered by the survey sample. Economic and social value associated with these SIC codes is, therefore, not included in the figures reported above.

Glossary of Terminology

Economic Value or Impact: This is the economic value associated with a given activity or intervention, such as culture in Bristol. Economic value can be measured in relation to a wide-variety of metrics, such as Employment or Gross Value Added. In this study, economic value is measured in terms of income within Bristol’s economy – whether income as revenue to organisations in Bristol or income as wages to workers in Bristol.

Visitor Spend: This is spending by visitors on trips to cultural destinations or activities in Bristol.

Visitor Economy: This is the proportion of spending by visitors on trips to cultural destinations or activities in Bristol that occurs outside these cultural destinations or activities (e.g., increased demand at Bristol pubs and restaurants due to cultural attraction visitors). Organisational Spend is at least partly financed by Visitor Spend on-site at these cultural destinations or attractions – therefore, we isolate the Visitor Economy proportion to not double count the impact of on-site visitor spending.

Organisational Spend: This is spending by cultural

organisations in Bristol on wages, programming/activities and third-party suppliers.

Direct Economic Impact: This is the economic impact on Bristol created by the spend of visitors to cultural destinations or attractions in the Visitor Economy of Bristol and Organisational Spend in Bristol.

Multiplier: Both the Direct Economic Impact of spend by in the Visitor Economy and Organisational Spending generate indirect or ripple impacts along related supply chains (e.g., when visitors spend in Bristol’s pubs and restaurants, these pubs and restaurants need to make purchases to meet this demand). A multiplier is applied to estimates of Direct Economic Impact to capture these indirect or ripple impacts and quantify total economic value or impact.

Grossing up: The process of transitioning from estimates based on a survey sample (e.g., the 54 arts and culture organisation that responded to the Survey in Bristol) to estimates of a larger population (e.g., all activities in Bristol contained in the definition of culture applied to this study).

Social Value or Impact: “Social impact is a term designed to demonstrate positive or negative outcomes to people or the planet,” according to the Bristol Social Value Policy. “The priorities when considering Social Value are therefore aligned with those of the ‘A One City: Economic Recovery and Renewal Strategy’” Some of the positive outcomes to people and planet of culture in Bristol are captured in its Economic Value or Impact. But there are other positive outcomes on people and planet from culture in Bristol that Social Value or Impact seeks to quantify.

TOMs: These are Themes, Outcomes and Measures (TOMs), which are aligned with the Bristol Social Value Policy, that estimate the monetary value of Social Value or Impact in the form of positive outcomes on people and planet from culture in Bristol.

Contact Us

+44 (0) 207 253 2041
Jonathan Todd
Chief Economist
jonathan@bop.co.uk
www.bop.co.uk

15 Southampton Place
London
WC1A 2AJ

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BOP
Consulting

