Understanding and Shaping the Cultural sector

In the London Borough of Croydon

Draft Final Report

September 2010

Contents

Executive Summary

1. Introduction

Tom Fleming Creative Consultancy was commissioned in May 2010 by Croydon Borough Council to carry out this research into **Understanding and Shaping the Cultural and Creative Sector in the Borough.** The objective of this consultancy was to provide robust evidence for the raft of strategies currently being developed, including the *Core Strategy*, *Culture and Sport Strategy* post-2012 and the *Economic Strategy*[1]. In addition we were asked to consider diversity as a key cross-cutting theme for the Borough. Three main elements of work were agreed:

– Spatial and activity mapping of the cultural and creative sectors across the Borough

– Analysis of audiences and engagement

– Qualitative survey and workshops looking at current barriers and future needs of the sector

In delivering these elements our methodology included:

– **Literature and data review** including Borough strategies, regional and national creative and cultural economy research and strategies, GLA creative industries and London Boroughs reports and data, Audiences London attendance and expenditure data, Arts Council England Taking Part data, Fairfield Hall audience data, Experian creative and cultural sector data, Croydon Council contact lists

– **Analysis of audiences and engagement data**

– **Development and analysis of Croydon Creative and Cultural Database – mapping the sector**

– **Online survey** of creative and cultural sector sent to 523 contacts reaching 470. 31 creative businesses and 31 cultural organisation responses

– **4 workshops** looking at current barriers and future needs of the sector - Croydon planning and arts and heritage staff, Night-time Economy, Arts Education and Creative Business - attended by 62 people in total

In addition we conducted a series of **one to one interviews** with a wide range of stakeholders.

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[1]Originally this included Croydon's Transforming Schools Programme, but following the ending of Building Schools for the Future this element was curtailed

1.1 Croydon: An inner and outer Borough

"It is recognised that the 'outer-London borough' label is not always a helpful one – outer London does not exist as a sub-regional concept, and many boroughs actually have the kinds of spatial and social characteristics that are normally associated with both outer and inner London."
Cultural Metropolis, The Mayor's Draft Cultural Strategy: 2012 and Beyond

The story of Croydon as a place for creativity and culture reflects many of the unique challenges, complexities and contradictions of the Borough as a whole. It is the largest Borough by population, with over 350,000 inhabitants, and the second largest by working population, with a workforce of 165,000. This working population is though to be the least fluid out of all 32 London Boroughs, with most workers living and working in the Borough. It has much of the feel of a city, with a defined metropolitan centre offering considerable shopping, cultural and leisure facilities. It is equally well-defined by its collection of small-scale district centres such as Thornton Heath, Crystal Palace and New Addington. It is famous (or infamous, depending on your viewpoint) for its high-rise urban cityscape, yet at the same time is one of the greenest boroughs with 120 parks. To the North it looks, feels and operates as an inner-London Borough, while in the South it has more in common with its leafy suburban neighbours in and outside of the M25.

The story of culture and creativity is similarly nuanced. In terms of traditional cultural infrastructure – theatres, galleries and performance spaces – the Borough can seem under-served like many other 'outer Boroughs'. However, the excellence of its transport links means that the 'super-served' West End and Southbank are right on the doorstep for many residents. The newly opened London Overground connection to East London, further ensures that the Borough is locked into the cultural grid of the Capital with the East-end and its cultural vibrancy a short trip away. Croydon is the home of dubstep which over the last decade has become internationally famous – yet there is no venue regularly hosting dubstep events in the Borough. There over 300 community arts organisations, with a particular strength in dance, but no central hub that recognises the importance and value of the sector. In the Clocktower there is an extraordinarily busy library, lively independent cinema and ground-breaking local museum yet there is still a lack of the type of cultural hub that other places thrive-on. In Fairfield Halls, the Borough has its iconic venue - a near-identical version of the Royal Festival Hall – which is much-loved but lacking in the 21st Century flexibility and amenity that venues need to really succeed.

Time and again in our research, one message came out clearly: Croydon can really succeed as a place that welcomes and celebrates culture and creativity as something which makes the Borough a better place to live in, work in and visit. However to do so it needs to embrace the contradictions which make it special, because it is from the fact that Croydon is big and diverse, urban and green, metropolitan and village, connected and separate that makes it such an absorbing and opportunity-laden Borough.

In this report we explore the current strengths, weaknesses, opportunities and threats for culture and creativity in the Borough. We map in detail where creative businesses and cultural organisations from across the spectrum of the creative economy are to be found.

Equally we look at cultural infrastructure and the incredible variety of community groups that make up the cultural profile of the Borough. We examine the audience for culture and conclude by looking to the future and the five themes and actions which could positively shape Croydon as a place for culture and creativity. It concludes with the six drivers that we feel need to be in place if the Borough is to succeed as a place with Creativity and culture at its heart.

2. Mapping: Creative and cultural activity in Croydon

Based on the mapping work we have conducted for this study we have identified **1,620 cultural and creative businesses, organisations and individual practitioners in Croydon**. We have reached this figure in an attempt to establish a robust baseline which can be used to inform future strategic development work. The purpose of this exercise was to give a broad view of creative activity and infrastructure to understand more about where there were densities and where there were gaps in activity and provision. As with any mapping exercise we have had to make judgements on what to include and what to exclude, as well as deciding what forms of data can be trusted and included. An explanation of how we have arrived at our assessment is outlined below.

2.1 Methodology

As the starting point for this study we have adopted the Department for Culture, Media and Sport (DCMS) definition of the Creative Industries set out in their first two Creative Industries Mapping Documents, published in 1998 and 2001:

"Those activities which have their origin in individual creativity, skill, talent, and which have their potential for wealth and job creation through the generation and exploitation of intellectual property. These have been taken to include the following sectors: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software, music, the performing arts, publishing, software and television and radio".

There is an ongoing debate and research internationally into the best way to map and measure the cultural and creative sectors. To address some of the challenges in measuring the size and reach of the sector (see the health check below) and to capture the broader cultural activities not picked up though the 13 DCMS subsectors we expanded the definition. Thus, **additional sub sectors of heritage** including museums, libraries, archives and built heritage; and community to bring in the numerous **community facilities where creative and cultural activities take place**, such as community centres, halls, schools and leisure centres, as well as the many community groups that are not arts organisations or groups but who engage their members and the clients in cultural activities. As has been done in more recent creative industries studies (including the Greater London Authority Creative Workforce study 2010), we have **combined software and interactive leisure software** (games development) as there is no evidence of the latter in Croydon. We have **included the design sub sector**, which is omitted from the GLA Creative Workforce study due to statistical difficulties associated with capturing it precisely through SIC codes.

Each entry in the database has been allocated to a single sector, based primarily on the SIC code where one is available and the 'best fit' where a yellow pages or other description is available. There are several types of business that could fit within more than one sub sector. For example, yellow pages code Advertising and Graphic Designers could be placed in

Advertising or Design. In this study they have been included within the Advertising sub sector.

The methodology for this study has focussed on identifying and listing cultural and creative businesses, organisations and individual practitioners, within the Croydon Borough boundary[2], to create a 'live' list of cultural and creative activity and facilities. A bespoke 'sector animation tool', has been developed to collect and analyse data - the Croydon Cultural and Creative Database. This forms an additional key output of the work.

Sources of data

The Croydon Cultural and Creative Database has been developed using data from four sources:

1. **Data purchased from Experian[3]:** Business records were selected using the DCMS identified four digit 2003 SIC codes as the primary source (see appendix 1 for a list of the SIC codes). Additional SIC codes from the DCMS evidence toolkit were added to bring in data on cultural activity. Further cultural and creative businesses were identified through the cross referencing of the businesses identified through SIC codes, with Yellow Pages categories which provide a clearer description of the nature of the business therefore allowing for clearer identification of creative and cultural businesses and organisations.

2. **Contact lists and individual contacts provided by Croydon Borough Council arts, heritage and planning officers.**

3. **Database of contacts provided by Croydon online**, Croydon community information website www.croydononline.org.

4. **Street trawling:** businesses identified on visits to different areas of Croydon.

Whilst the above approach has sought to identify as many creative and cultural business, organisations and individuals as possible, it is likely that there will still be more yet to be uncovered. Individual practitioners and small businesses operating not on 'official lists' are those most likely not be included here.

Employment data is available for 50% of the records in the Croydon Cultural and Creative Database providing an indication of sub sector strengths in terms of employment. A review of the latest GLA Workforce Data 2009 has proved further evidence of Croydon creative industries sub sector strengths and weaknesses. An assessment of past trends in creative industries sector employment has been undertaken through a review of Annual Business Inquiry data 2006-2008[4].

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[2] Cultural organisations identified as delivering cultural activities and services to Croydon residents have also been included in the mapping.

[3] Experian have a database of over 2 million UK businesses, updated monthly through the collection of data from Companies House (Ltd Company information), Yellow Pages (exclusive access to all Yellow Pages business data) and Thomson Directories.

[4] ABI estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the way employment estimates were drawn the ABI survey. Therefore, Office of National Statistics advise against making comparisons of employment estimates before and after 2006.

Outside the scope of this research has been detailed analysis of the creative workforce employed within the non creative industries sectors. The GLA London Creative Workforce update 2009 identified more creative jobs outside the creative industries sector than within it (386,000 creative industry jobs and 411,000 creative jobs outside the creative industries). Around 10% of London's jobs are identified as creative. An example of such a job is publications manager in a bank. It is also worth noting that within the creative industries less than half the jobs are 'creative' according to the GLA study.

Table 1: Proportion of creative jobs in selected industries outside the creative industries

Job categories	Creative intensity
Public Admin, Education and Health	2%
Distribution, Hotels and Restaurants	3%
Transport, Storage and Communications	4%
Construction	8%
Banking, Finance and Insurance	11%
Manufacturing	17%

Source: GLA London Creative Workforce Update 2008 – based on data from GLA Economics and Labour Force Survey

Data health check

In building a data list from which to map the creative and cultural sector for this study we have taken the DCMS defined SIC codes for the creative industries. However, it is widely acknowledged that current SIC codes do not adequately reflect the CI sector. To address this issue in compiling our data for Croydon we have augmented the data purchased from Experian by adding yellow pages categories that represent cultural and creative activity to our selection criteria for data purchased. We have carried out analysis and sorting of the records to delete non-creative businesses such as surveyors and structural engineers that appear under SIC code 7420 which also includes architects. We have also reallocated businesses to more appropriate sectors.

Added to the list purchased from Experian are the cultural and community organisations, creative businesses and creative practitioners provided by London Borough of Croydon.

It is likely that there are still additional cultural and creative sector organisations and practitioners not picked up through this mapping, in particular individual practitioners and sole traders that are not registered companies and operate below the VAT threshold, so therefore, do not appear on official lists.
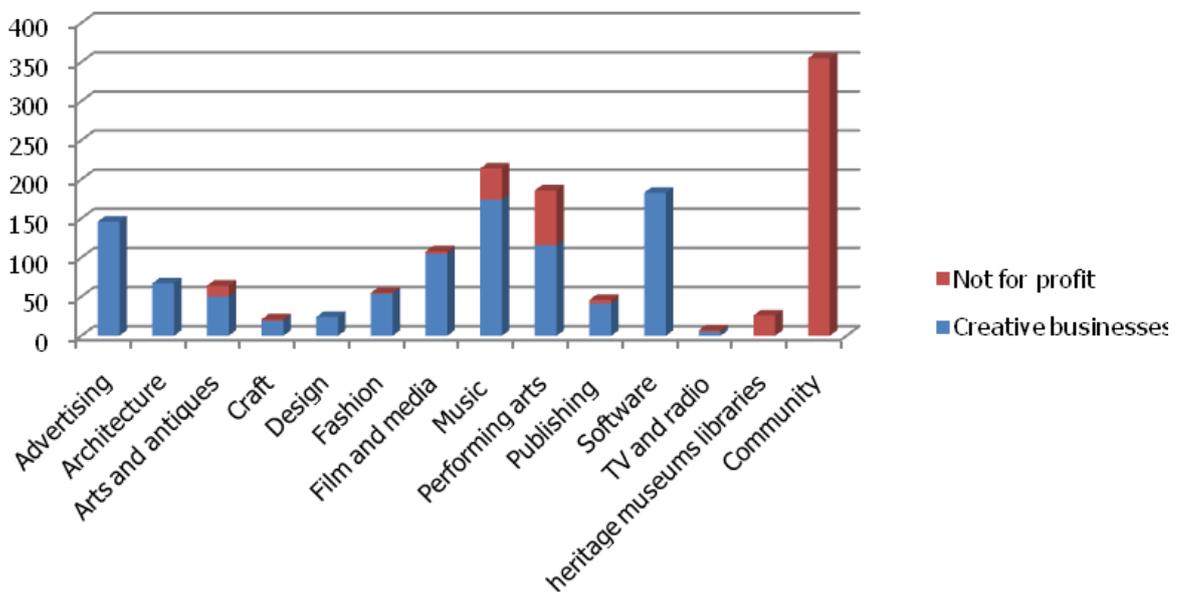
2.2 Creative and Cultural Sectors in Croydon

Creative and cultural sector activity is spread throughout the Borough with particular concentrations in the central metropolitan area and in the north of the Borough. There are also concentrations of activity along the southwest A23 corridor and around other main artery roads across the Borough.

65% (1052) of organisations identified in this study are commercial businesses. 35% are not for profit organisations including funded arts organisations, schools, or purely voluntary groups such as the many amateur theatre, music, writing and arts groups.

The sector is not a large scale employer with 70%[5] of the organisations employing five people or less. Just 10% employ over 40 people and only 26 organisations are identified as employing 100 people or more and these are mainly schools.

In terms of numbers of businesses and activity, music and performing arts show particular strengths with not for profit organisations making an important contribution (see figure 1 below). As seen in the sector breakdowns below, some of the this activity is amateur and not revenue generating, but none less important for the quality of life, sense of place and opportunities for participation in cultural activity. Software and advertising are the strongest commercial sectors.

Figure 1: Number of business and organisations by sector

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[5] Data on number of employees is available for 50% of the entries in the Croydon Creative and Cultural database. Any reference to employees is based on analysis of this 50%.

2.2.1 Creative and cultural sub sector profiles

The following section presents a short profile of each of the Croydon's cultural and creative sub sectors.
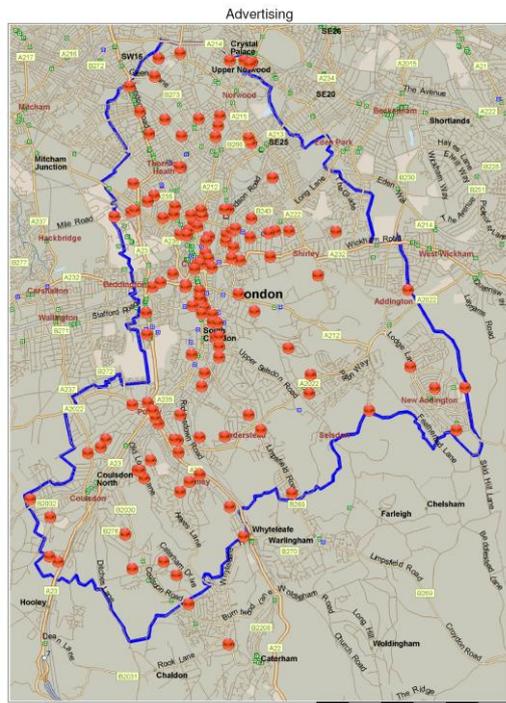

a) Advertising (146 businesses)

Concentrated around central and south Croydon with small groups of businesses in the south and north of the borough, the advertising sub sector is largely made up of advertising and marketing companies, exhibition/ event organisers and suppliers and advertising graphic designers.

37% are advertising graphic designers so could also come within the design sub sector.)These designers have been identified through the yellow pages category are not picked up through traditional creative industries SIC as some, but not all fall within SIC code 7487 other business activity which is currently allocated to fashion).

The largest employer identified in this sub sector is ICLP, a global loyalty marketing company employing 50 people at their offices in South Croydon. Croydon's advertising companies are largely micro businesses employing 10 people or less. Nearly 30% are sole traders.
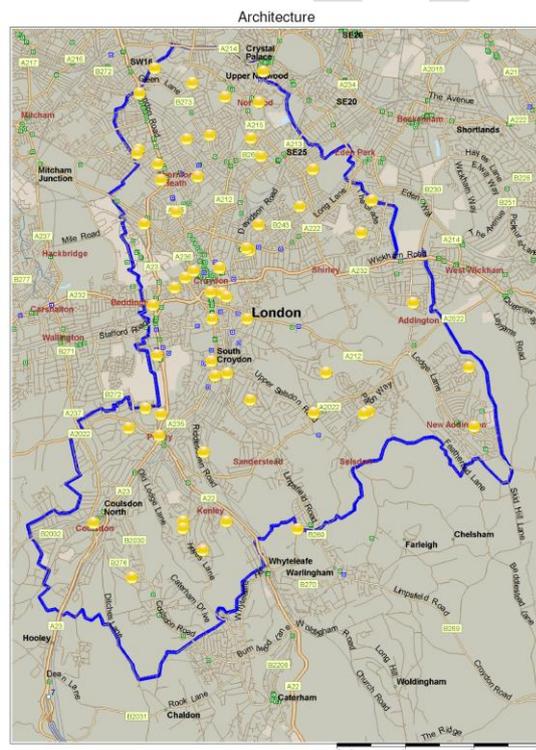
b) Architecture (67 businesses)

The architecture sub sector includes architects, landscape and interior designers. It does not include the many surveyors, structural engineers and other architectural service companies that are within the SIC code 7420. This study has purposefully sought out the 'creative' businesses, although there will no doubt be many creative people working within the other architectural service companies. Over 200 additional companies in Croydon work in this wider architectural service sector.

Scattered throughout the borough, there are small concentrations of architectural activity in central and south Croydon.

Small scale in terms of employment, just four of the 67 companies employ more than 10 people with 46 of them employing less than five people.

Arts and Antiques
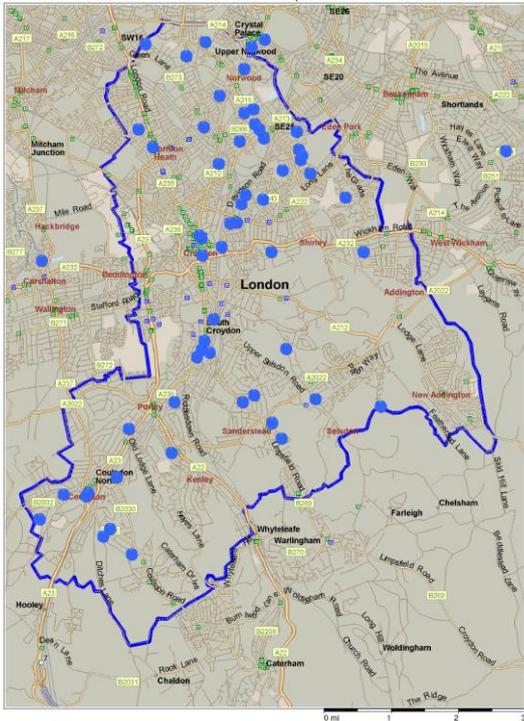
c) Arts and antiques (74 businesses, organisations and individuals)

This sub sector is made up of individual artists, professional and those in amateur groups, antiques shops and restorers, and arts organisations (mainly based outside the borough, but working on projects with Croydon residents such as Asian Arts Access from Guildford.

There is a higher concentration of artistic activity in the north west of the borough, but the sub sector is small scale in terms of employment maximum of 3 people are employed in the 15 art and antique dealers identified. As might be expected the sector is predominantly mad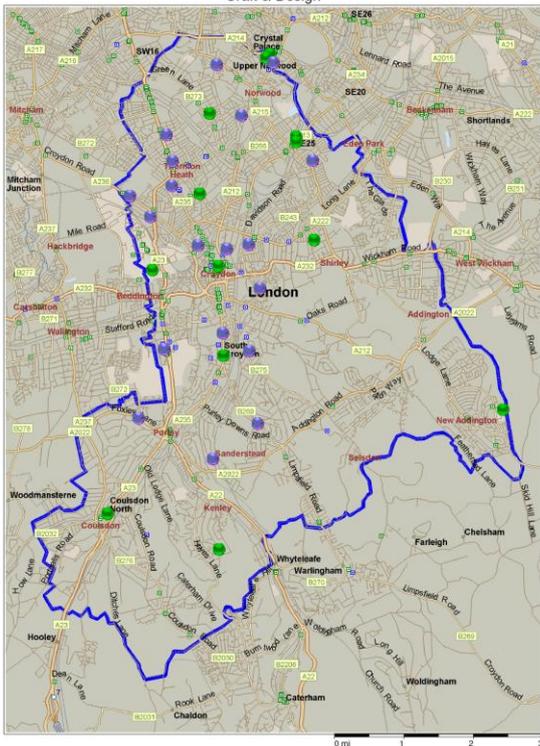e up of sole traders. There is also an active amateur artistic sector with groups such as Coulsdon and Kenley and the Purley Art Groups.

Craft & Design

d) ⬤ Design (24 businesses)

The small number of design businesses does not mean that the design sector is not thriving within Croydon. Again it comes down to classification. The 'design consultants' identified through the yellow pages category are a mix of graphic designers - so could be included under advertising, web designers - so could be included under software, and building designers - so could be included under architecture.

e) ⬤ Crafts (20 businesses)

Craft (also referred to as designer makers) businesses include stained glass makers, and furniture designers and cabinet makers and book-binders although it is likely these are more industrial book-binders than craft.

Craft and design sub sectors all micro businesses, tending to locate in the north of the borough.
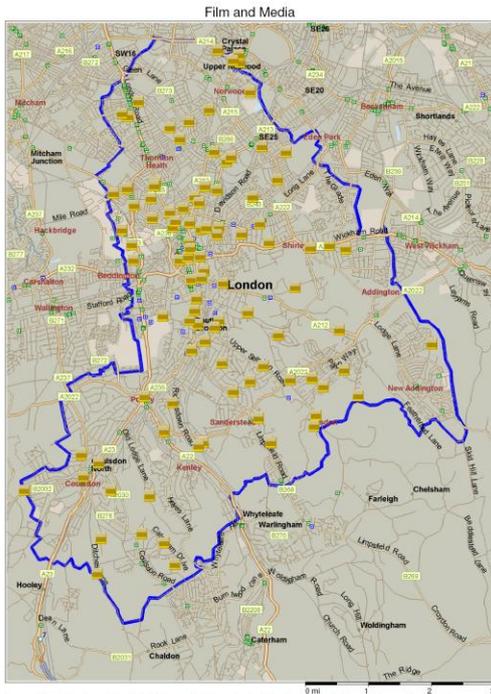
f) Film & Media (108 businesses)

Two thirds of this sector is photographers (66 businesses). But there is small but active film production sector with around 30 companies involved in film production or development. There are also a number of active film and photography amateur groups.

g) TV & Radio (7 businesses)

The closely associated radio and TV sector has a smaller number of organisations including community radio stations, radio enthusiastic groups and a Muslim TV network.
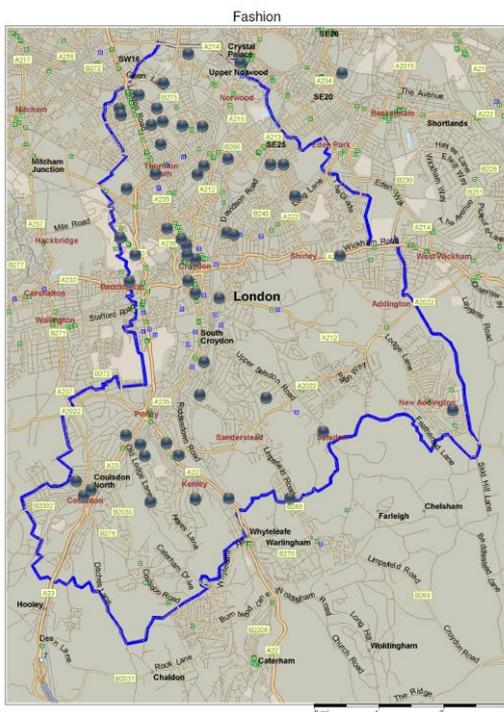
h) Fashion (55 businesses)

The fashion sub sector is made up predominantly of independent fashion retailers and make-up artists, located in the north and west of the borough.
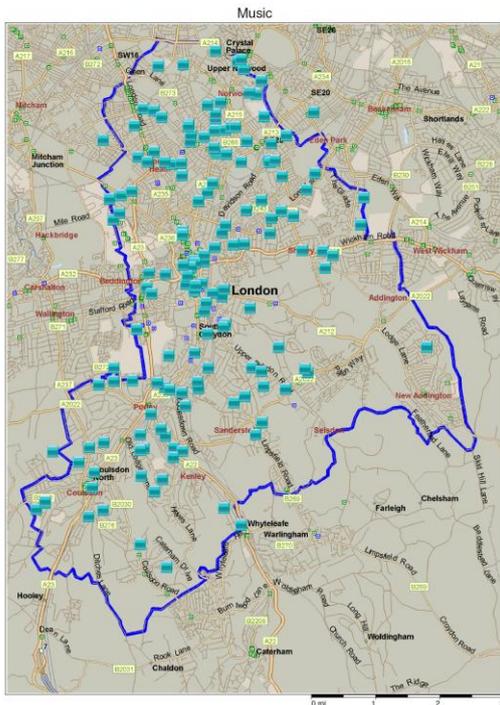
Music

i) Music (214 businesses and groups)

Spread across the borough music is a strong sector with over 30 music teachers, 11 music schools and numerous community music organisations and amateur groups and bands.

The home of dub step there is also a strong contemporary music element with 15 management and production companies and facilities.

There is a lack of music performance spaces but ten music venues (pubs) have been identified. There are likely to be many more pubs and community spaces where music is performed, not picked up through this research.
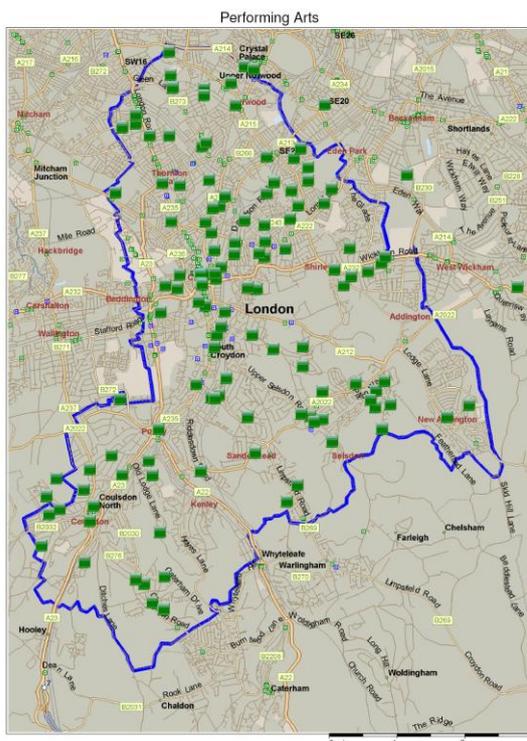
Performing Arts

j) Performing arts (187 companies)

Two of the boroughs main cultural assets fall within this sector – Fairfield Hall and Warehouse Theatre.

The strength of dance in the Borough is also shown in this sector with over 70 dance schools, classes and dance groups.

There are nearly 40 theatre and drama groups, several outside the borough but delivering activities on Croydon such as Tara Arts and Future Theatre Company and numerous 'other entertainers'.

Publishing and Literature

k) Publishing and literature (46 businesses)

The main publishing hub is around central metropolitan district and scattered along main arterial routes in the north and south of the borough.

While only a small sector in terms of number of businesses, publishing has some of Croydon's largest creative sector employers with three companies employing over 100 people Superbike Magazine, FHG Ltd and Jane's Information Group. A further 17% of businesses in this sub sector employ between 10 and 50 people. But 77% are still micro businesses employing 10 people or less.

Software
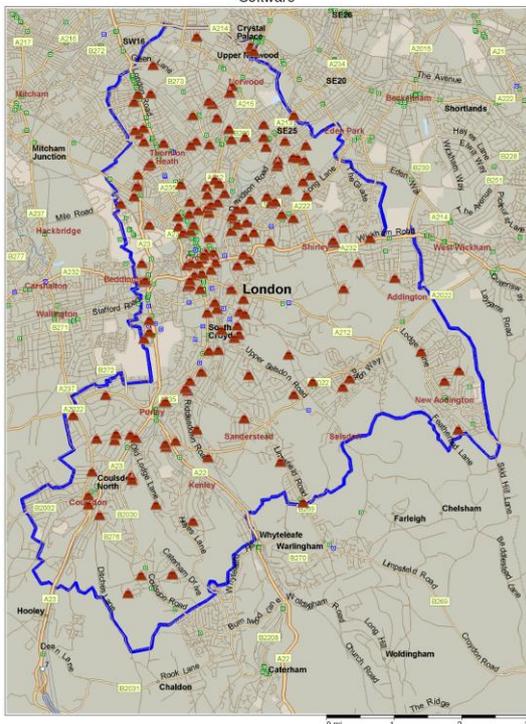
l) Software (183 businesses)

Software companies are fairly well spread across the borough. They backend and creative front end of software companies - a mix of software developers, consultants and web developers and website site designers. But they are unlikely to be the games and leisure software businesses that GLA identify in their latest Creative Workforce report. They are, however, knowledge intensive businesses, the drivers of ideas and internet technology.

While 89% of those where information on employees is available are micro businesses, employing 10 people or less and 36% sole traders, there are some larger employers with two companies employing 100 people in the central Corydon area.

Heritage, Museums, Libraries

m) Heritage, Museums, Libraries and Archives (25 organisations)

12 libraries and Croydon Museum as well as heritage sites such as the Shirley Windmill, Croydon Airport Museum and Addington Palace.

What is not included here, but acknowledged as part of the heritage and cultural assets of the borough are the 51 historic parks and gardens and the numerous English Heritage listed buildings including 7 Grade I listed buildings – Old palace School, Church of John the Baptist, Hospital of Holy Trinity, Church of St John the Evangelist, Church of St Mary Addington and Church of all Saints – and over 100 Grade II listed buildings.

n) 21 festivals have been identified including the Croydon Fashion Festival, Croydon Film Festival, Croydon Music Festival, Croydon Summer Festival and Mela, as well as the many local festivals – New Addington Carnival, Crystal palace Triangle Festival, South Norwood Festival and Norbury Dance Festival.

These have not been plotted on a map as many take place in multiple venues.

Legend:
- Other Cultural Orgs
- Other Community Orgs
- Not for Profit Arts Orgs
- Education
- Creative Businesses
- Community Arts Groups
- Amateur Arts Groups
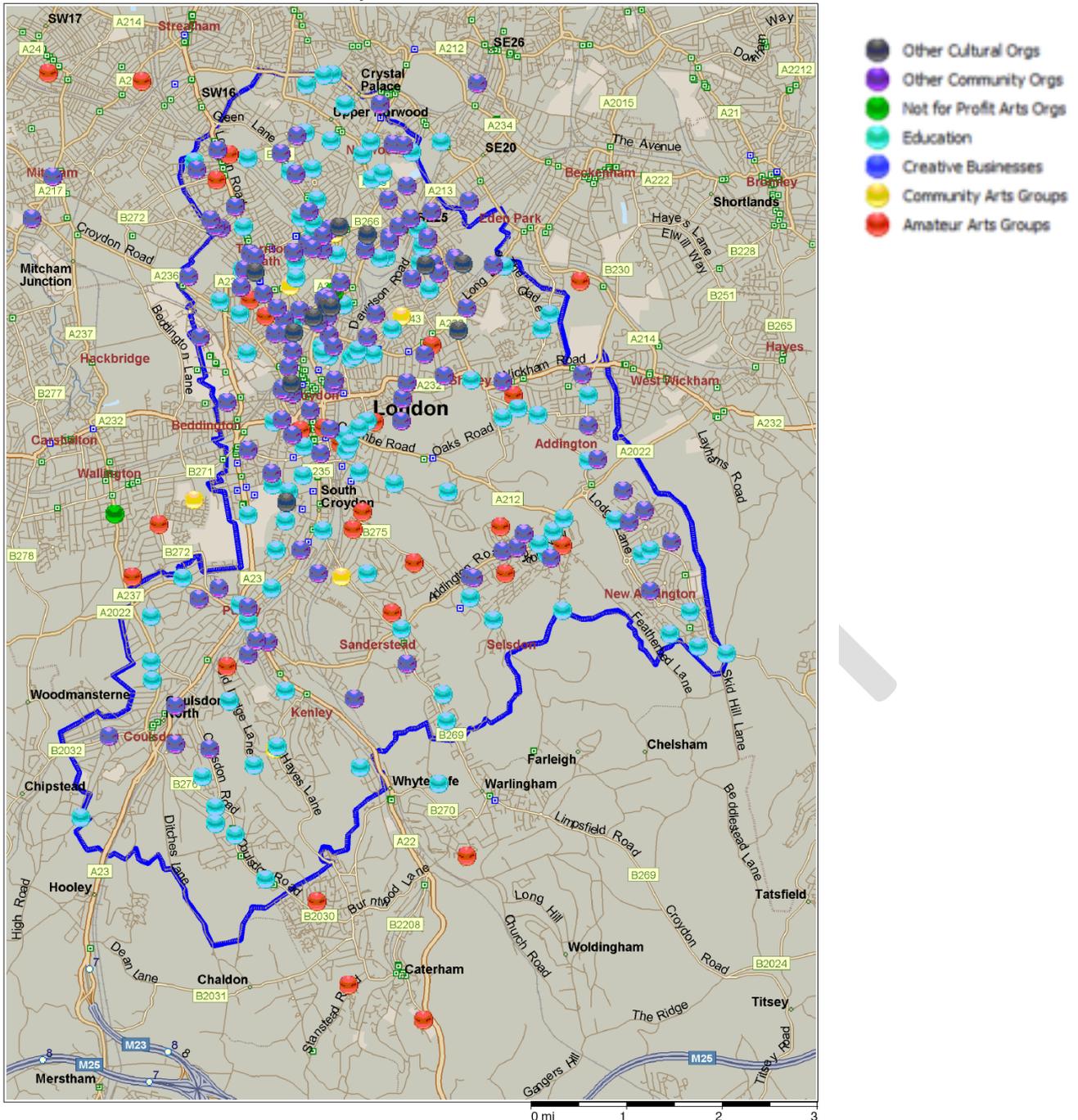
o) Community (360 organisations)

The wider cultural and community sector are an important part of the cultural and creative fabric of Croydon – those organisations that may not have creative or cultural activity as part of their core purpose but that engage Croydon residents in a diverse range of cultural activities.

140 schools and colleges are vital sources of cultural activity and creative skills development from the borough's young people. Schools outside the borough are also playing a role with at least 2,500 young people travelling to schools in Sutton each day (*Croydon Today 21 February 2010*).

35 amateur arts groups in addition to those already identified under creative sub sectors (nearly 100 groups identified altogether), involving hundreds of local people in creative and cultural actives such as writing, painting, photography, singing and performing.

Over 150 other community organisations that may (or may not) be offering some form of cultural activity but who provide a gateway to residents and communities of Croydon.

2.3 Cultural Infrastructure in Croydon

The north and central part of the Borough are particularly well served by cultural infrastructure, mainly through schools and community organisations. A full audit of school facilities and their accessibility by the wider community has not been possible in this study but it is assumed that all schools will be providing some form of cultural infrastructure for pupils in particular but also for family as more schools look to play a greater role within their community.

Please note: this map may be adjusted/revised in final report

All Physical Infrastructure
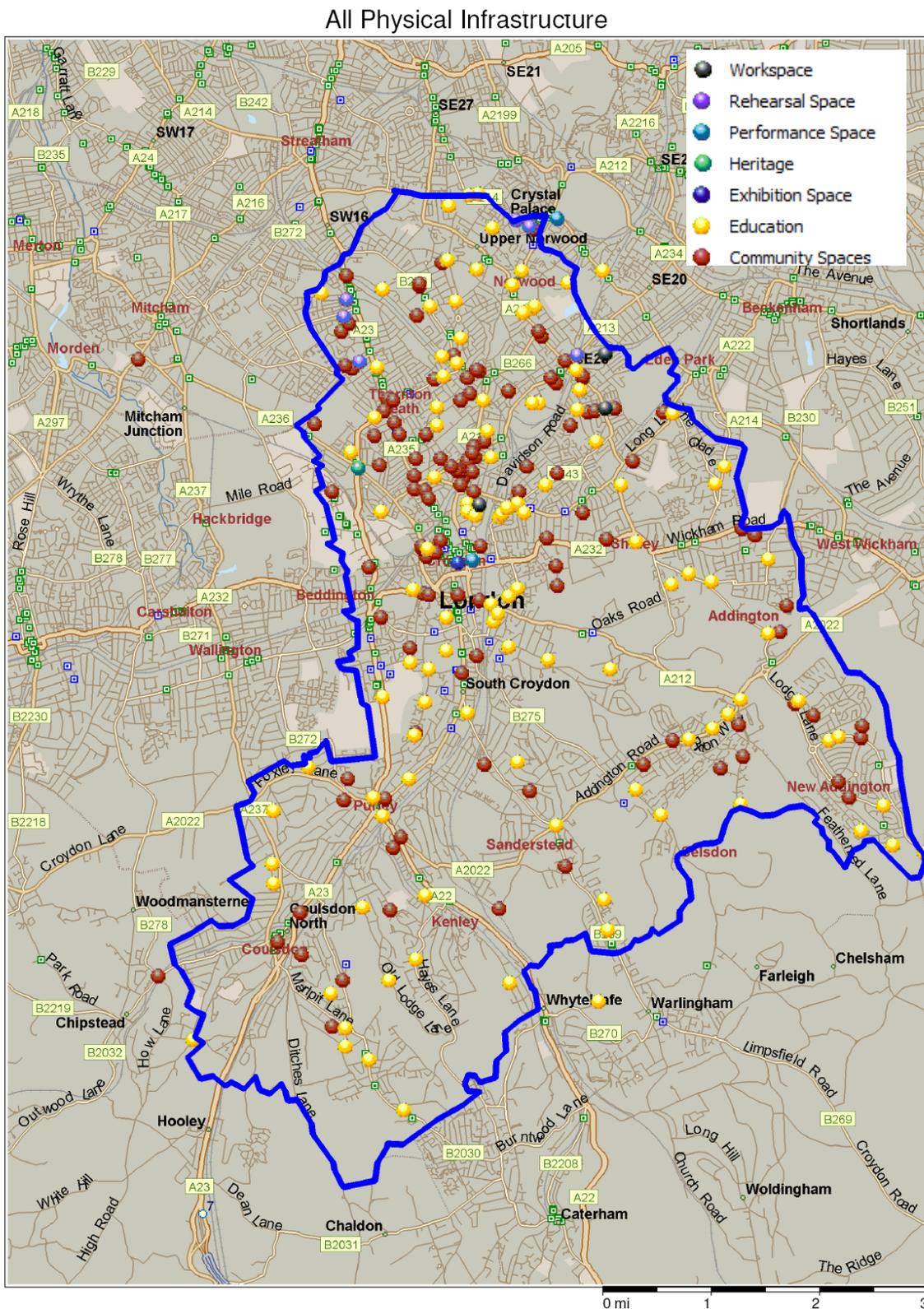
The large number of community facilities is based on the assumption that the majority of community organisations in the borough will have some kind of meeting space, meeting room or space where staff or volunteers meet with community members or clients. Again, a full audit of facilities has not been possible. An indication of the level of community facilities that could be available for cultural actives is provided through the Croydon online website which has details of 76 places for hire. These range from church halls and community centres - including St Mary's Church Hall in Addington, St Mark's Church Hall in Purley, Phoenix Community Centre in Upper Norwood and Shirley Youth and community Centre – to sports and leisure centres – such as Norbury Park Lawn Tennis club and Crystal Palace Football club – and heritage building such as Addington Palace and Ruskin House.

Performance spaces for music, theatre and dance are predominantly in the north and centre of the Borough, identified through the survey carried out as part of this study and the interviews and workshops include:

- The **live music pubs and clubs** – the Green Dragon, Black Sheep Bar, Loop Lounge, Lord Napier, Ship of Fools, and White Hart.

- The **main performance venues** – the Ashcroft Theatre at Fairfield Hall and Warehouse Theatre.

- **Other performance spaces** – the Clocktower, Shoestring Theatre in South Norwood home of the Croydon Youth Theatre and the many open space and community spaces that host dance, theatre and music performances throughout the year.

The Borough lacks exhibition space with the Bigger Picture Gallery providing one of the only dedicated exhibition spaces in the Borough. There are small exhibition spaces in the Clocktower and Fairfield Hall.

Croydon is well served with green spaces, with 120 parks and 51 historic parks and gardens. These form an integral part of the cultural infrastructure of the Borough providing spaces for structured cultural activity such as festivals and performances as well as places for the residents to take part in active pursuits contributing to healthier lifestyles as well as being places to relax.

The heritage assets are also a strength, but the lack of access to the public and the short opening times due to the voluntary nature of the operation of many, limits the benefits of these assets both in terms of local enjoyment but also as visitor attractions.

3. Audiences and Engagement with Culture

To provide an assessment of actual and potential audience and participant engagement in cultural activities in Croydon four main sets of audience and participation data have been reviewed:

- Active People Survey data for National Indicator NI11[6]
- Audiences London 2008/09 Snapshot data[7]
- Arts Council England 2008 Arts-based segmentation propensity to engage data[8]
- Fairfield Hall audience data

Croydon is fairly typical of an outer London borough in terms of residents' attendance of and participation in arts and cultural activity.

3.1 Audience and engagement profile

Both the NI11 data and Audiences London Snapshot **data shows Croydon as having average levels of engagement in arts activity** when compared to other London boroughs (see figures 2 and 3 below). The NI11 data shows 44.3% of Croydon residents participating in three arts activities in the last 12 months. This is considerably below central London Boroughs such as Camden but well above cultural activity level in boroughs such as Newham.

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[6] NI 11 measures the percentage of adults in a local authority who have either attended an arts event or participated in an arts activity at least three times in the past 12 months. The Active People Survey is the national telephone survey about participation in cultural activities and sports, used to measure any percentage change in arts and sports engagement.

[7] Snapshot London uses audience booking data from 39 large, medium and small-scale performing arts organisations from all across the London, covering a wide variety of artforms. Together, these organisations contribute information on the booking behaviour of over half a million unique households – and this is growing year on year. The data provides London-wide audience benchmarks.

[8] Arts Council England's 13 arts-based consumer segments were developed based on 2005/06 Taking Part survey data. A postcode analysis model was developed by Caci Ltd in 2008 to consider the probability of people within different postcodes in England to engage to belong to the 13 segments based on the demographics and lifestyle characteristics of people living in the area.

Figure 2: Attended or participated in arts activity three times in the last 12 months

Camden 67.1%

Newham 28.9%

Croydon 44.3%

70%

48%

25%

Source: NI11 baseline, DCMS 2008
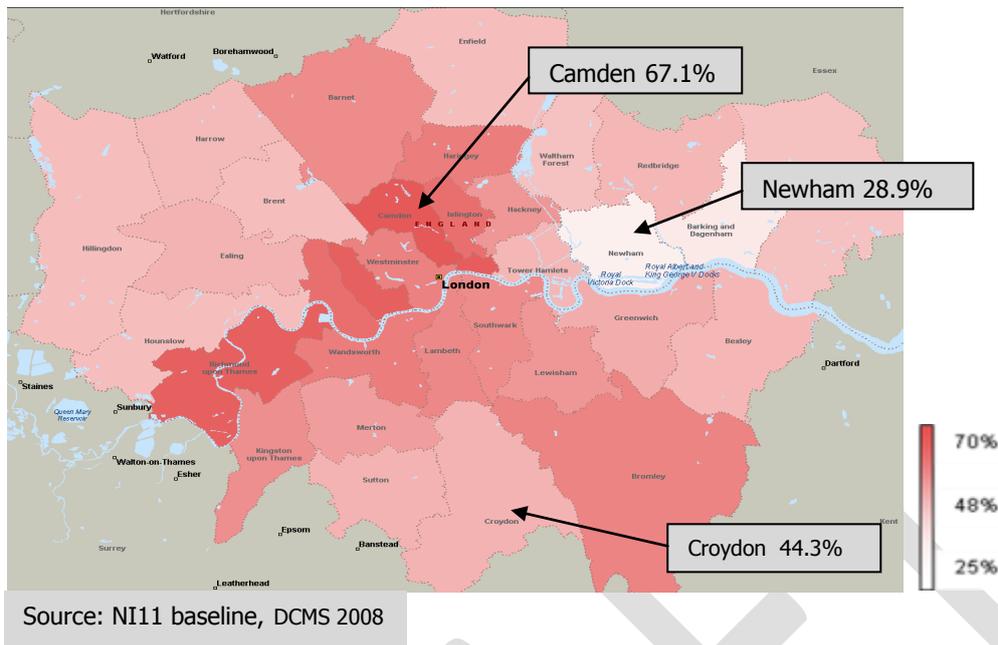
Figure 3: Profile of actual audience attendances across London

Source: Audiences London Snapshot data Sep 2008-Aug 2009

Snapshot Penetration Sept 2008 - Aug 2009
within each Postal Sector in London (Households)

- 38.46% and above (top 25%)
- 19.22% to 38.45%
- 8.61% to 19.21%
- 0.01% to 8.60% (lowest 25%)
- No penetration
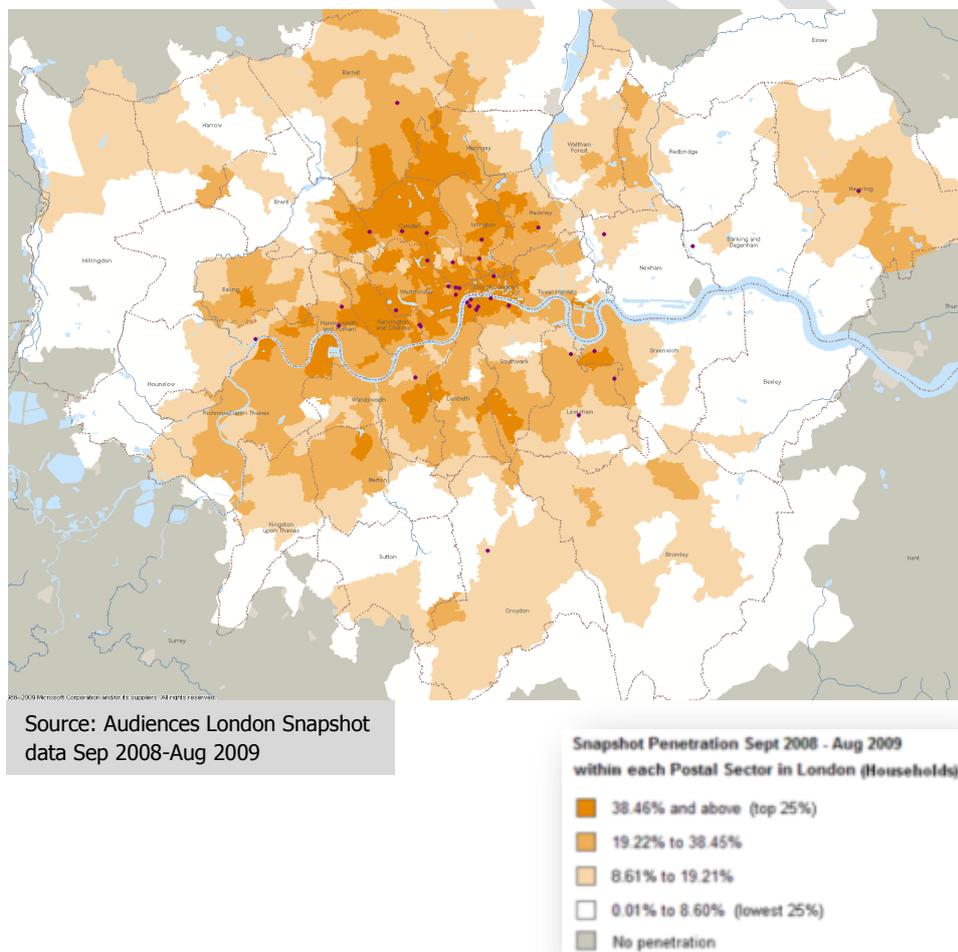
The Audiences London Snapshot data drills down further showing how residents in some parts of Croydon are higher cultural attenders than others. In Croydon the highest level of 'penetration' by postcode is 22% when the data is grouped into quartiles across London. The highest penetration of individual postcodes, by booking among the 39 snapshot venues, is 38.5% in some parts of London (the areas in the darkest shade of orange on the figure ? map below). When attendance by Croydon residents are looked at in isolation a more detailed profile of borough-wide audiences for culture can be seen (see figure ?). Upper Norwood (SE19 2), central and East Croydon (CR0 5), South Croydon (CR2 7 and CR2 0) and Purley (CR8 1 and CR8 3) show the highest levels of attendance at the 39 Audiences London snapshot venues.

Figure 4: Profile of actual audience attendance across Croydon

Source: Audiences London
Snapshot data Sep 2008-Aug

Snapshot London Penetration Map for all Croydon-based Households

- 17% to 22%
- 11% to 16%
- 5% to 10%
- 0.01% to 4%
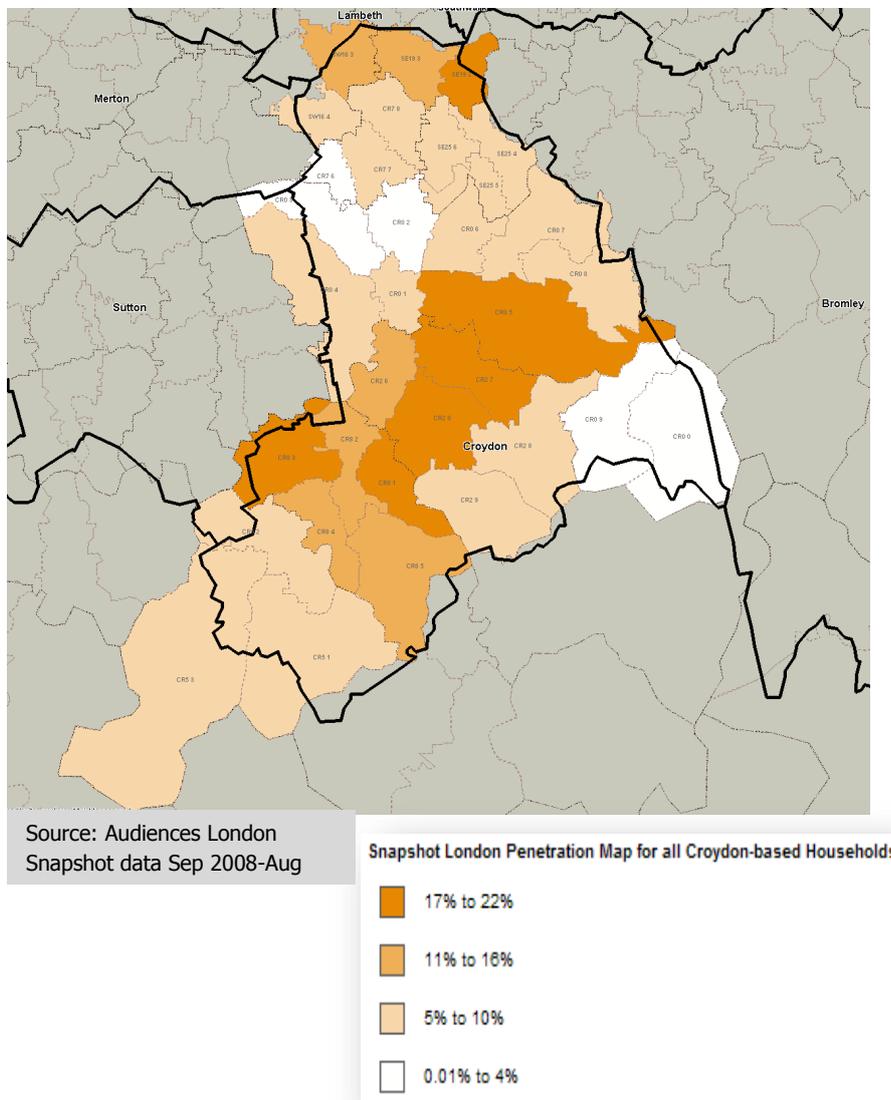
3.2 Propensity of the Croydon Community to Engage in Arts-based Activity

The modelling developed by Caci Ltd for Arts Council England as part of the Arts Insight project provides indications of how likely different segments of the community are to participate in arts activity. The modelling uses the 13 Arts Council England arts-based consumer segments. These were developed using actual participation data from the 2005/06 Taking Part survey.

The thirteen segments are grouped into three categories:

i) Highly engaged

Individuals who are by far the most engaged with the arts, with frequent attendance at a typically broad range of arts events, as well as high or at least moderate levels of active participation. This category includes two of the thirteen segments – *Urban Arts Eclectic* and *Traditional Culture Vulture*.

ii) Some engagement

This refers to individuals with some engagement with the one or more artform. This category includes seven of the thirteen segments, some of whom attend events while others are unlikely to attend events but do take part in some kind of creative activity. The segments include *Fun, Fashion and Friends; Mature Explorers; Dinner and a Show; Family and Community Focused; Bedroom DJs; Mid-life Hobbyists; Retired Arts and Crafts*.

iii) Not currently engaged

This consists of people who are currently unlikely to attend any arts events or take part in arts activities. This includes: *Time-poor Dreamers; A Quiet Pint with the Match; Older and Homebound: Limited Means Nothing Fancy*.

3.2.1 Croydon residents' propensity to engage in arts activity

As figure 5 shows just under a quarter of Croydon residents (24%) are unlikely to be engaging with the arts as participant or attender. The national average for this segment is 22%.

Those with 'some engagement' make up 66% of the population, below the average figure of 69.4%. However, 10% show signs of being 'highly engaged' in Croydon, above the national level of 8.3%, but lower than the London average of 13%.

Figure 5: Croydon residents' propensity to engage in arts activity
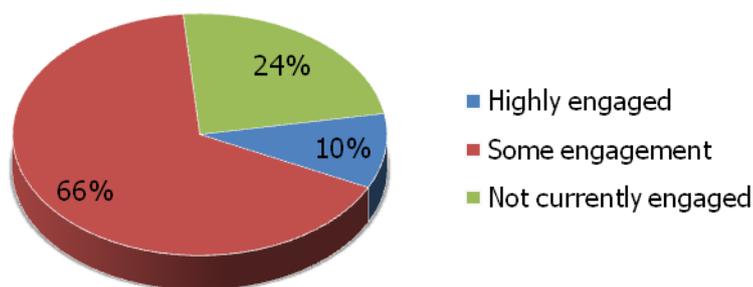
The four largest arts consumer segments in Croydon are all located within the *'Some Engagement'* category. This is the same 'top four' segments as for London as whole. In total they make over half (57.4%) of Croydon's resident population:

- Dinner and a show **20.8%**

- Fun, fashion and friends **17%**

- Family and community focused **10.9%**

- Mature explorers **8.7%**

Each of the three has a different set of preferred arts events and some groups are more active than others.

- For **'Dinner and a show'** the arts do not play a key role in their everyday life. Typically comfortably off, with average education and higher level positions in their workplace. They attend arts events infrequently, on special occasion in their social calendar. They have a tendency to stick to the 'tried and tested' in the arts: they attend live music events such as rock and pop concerts, theatre and musicals, with low levels of interest in other types of arts events. They are not particularly likely to consider themselves as 'creative', and have low levels of active participation in arts activities.

- **'Fun, fashion and friends'** express an interest in the arts, typically having received encouragement to attend arts events and participate in arts activities when growing up. Usually in the early stages of their career or just starting families they like to seek out new experiences and are willing to pay for quality. Their attendance usually consists of infrequent visits (once or twice a year) to more 'mainstream' arts events, including musicals, pantomime and plays, rock or pop concerts and art exhibitions. Many of them also engage with creative hobbies in their leisure time, the most popular activities including painting or drawing, playing an instrument and textile crafts.

- For **'Family and community focused'** while arts are not a central part of their lives, they engage through occasional visits to family-friendly arts events. Typically in their 30s and 40s, with a strong sense of community and family. Carnivals are by far the most popular activity, but they also attend musicals, pantomime and plays, craft

exhibitions, street arts and culturally-specific festivals (e.g. Mela, Baisakhi, Navratri). Their attendance tends to be infrequent – an annual trip to the carnival for instance, or once or twice a year at other types of events. 'Family and community focused' are the most likely segment to cite spending time with friends and family, accompanying children and supporting local community as reasons for attending arts events. They are generally unlikely to take part in creative activities themselves, although a few engage in textile crafts and computer art or animation.

– **'Mature explorers'** characteristically attend art and craft exhibitions, street arts and carnivals – arts events which fit their 'outdoorsy' and active lifestyle. They seek out new experiences through travel, trying out different cuisines and learning about different cultures. They keep up to date with current affairs displaying environmental and social awareness through their purchase decisions and lifestyle choices. For many of them, their arts engagement appears to be driven by curiosity and spontaneity: they are happy to engage with arts opportunities when they come across them, while being unlikely specifically to plan to go – their other interests usually take priority. They are not particularly inclined to take part in artistic activities themselves, with only low levels of interest in photography, painting and drawing and textile crafts.

The next two largest segments fall within the *'Not currently engaged'* category:

– Time poor dreamers **8.6%**

– A quiet pint with the match **7.7%**

– **'Time-poor dreamers'** engage with popular culture by listening to music on the radio, going to the cinema and watching TV. Early or mid career, often juggling work and family commitments, they are busy, budget-conscious and short-term oriented, living in the moment. They do not currently attend arts events or actively take part in any creative activities. The majority of them cite lack of time as their reason for not attending or participating in the arts – the arts are not a priority for them and do not naturally fit into their current lifestyle.

– For **'A quiet pint with the match'** attending arts events or participating in arts activities is not a part of their current lifestyle and many of them describe themselves as not interested in 'the Arts'. Many of them approaching retirement or no longer working and are not seeking change. They don't go to arts events or do creative activities because they feel it's not for them, they think they would not enjoy it, and they prefer to do other things instead. Typically they also received a low level of encouragement to attend and participate in the arts when young.

Figure 6 below shows that Croydon has similar levels of residents *'Not currently engaged'* as the neighbouring inner London boroughs of Lambeth and Southwark, but lower levels of *'Highly engaged'* residents than these boroughs. Croydon has similar levels of *'Highly engaged'* residents to Bromley and Sutton but slightly more residents *'Not currently engaged'.*

Figure 6: How engagement in Croydon compares with surrounding Boroughs, London and England
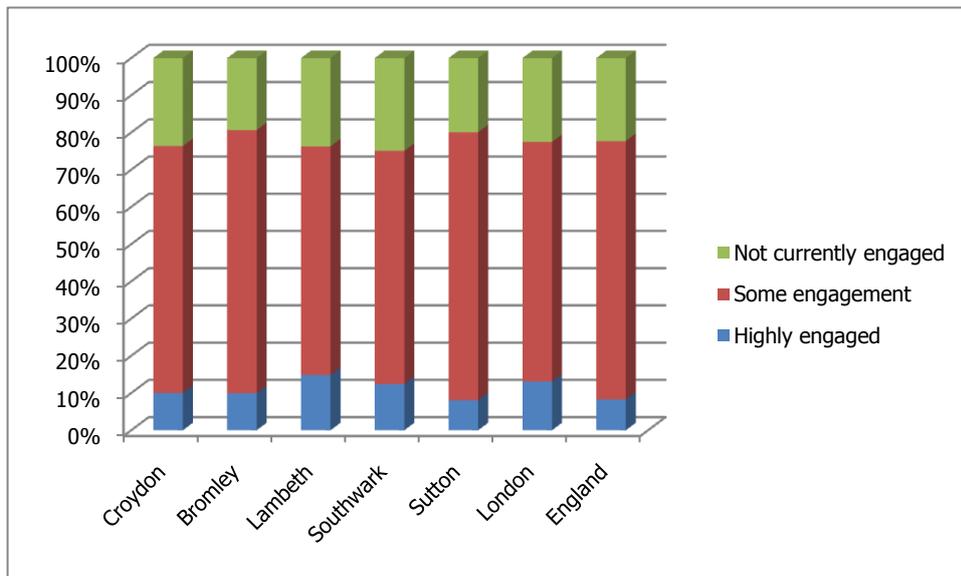
3.3 Croydon: fulfilling its engagement potential

Croydon residents are engaging in arts activity slightly more that would be expected. Figure 7 below shows the NI11 2008 baseline modelled against the ACE 13 segment postcode modelling showing which boroughs' boroughs' residents are engaging is arts activity over and above what would be expected. As the map indicates, Croydon is just behind central London boroughs in engaging above its expected potential and ahead of all other outer London boroughs, several of which are falling below levels of expected engagement.

Figure 7: Actual against expected engagement
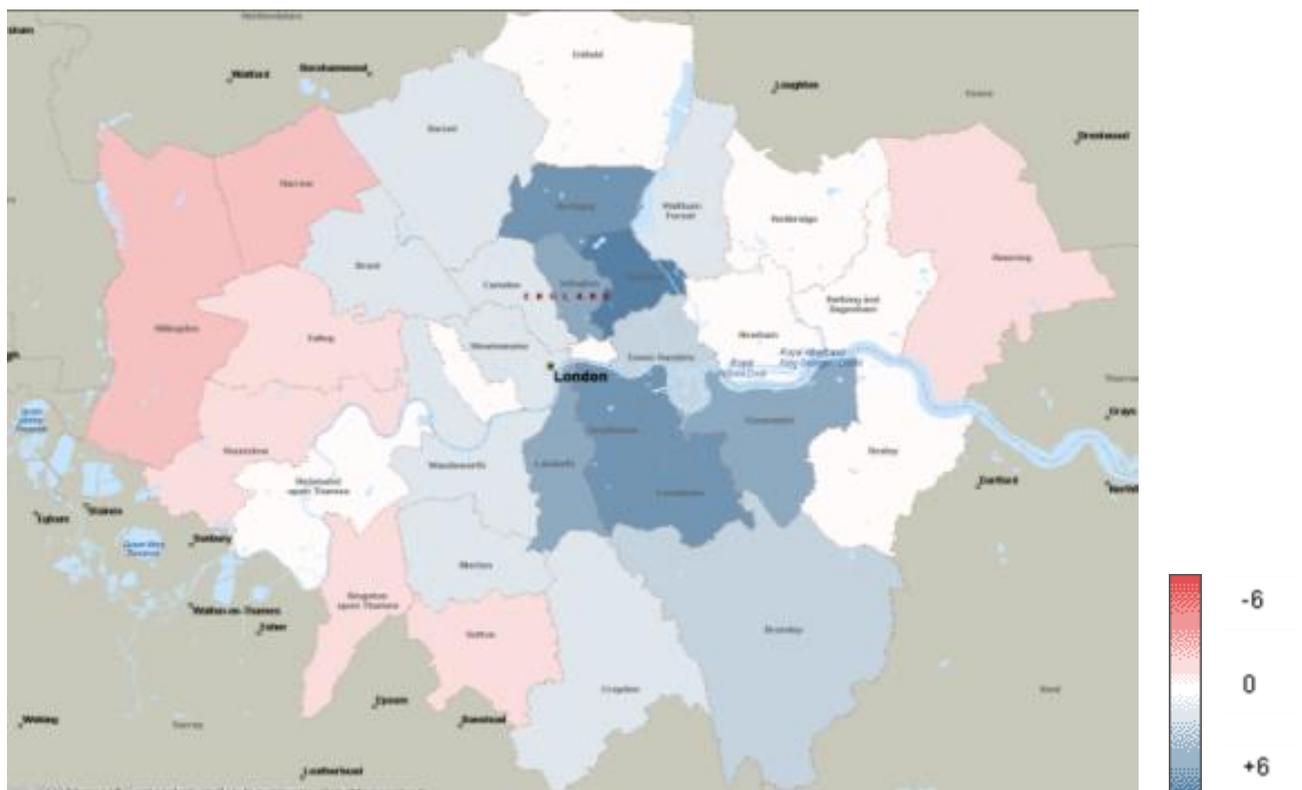
3.4 Local culture for local audiences

Research by Audiences London shows that the majority of outer London borough residents' (70% of households) travel five miles or less for their cultural experience. This evidence demonstrates the need for locally appropriate culture in outer London despite being just a short distance from one of the densest and most varied cultural offers in the world, in central London.

Figure 8: Distance audiences travel to cultural venues
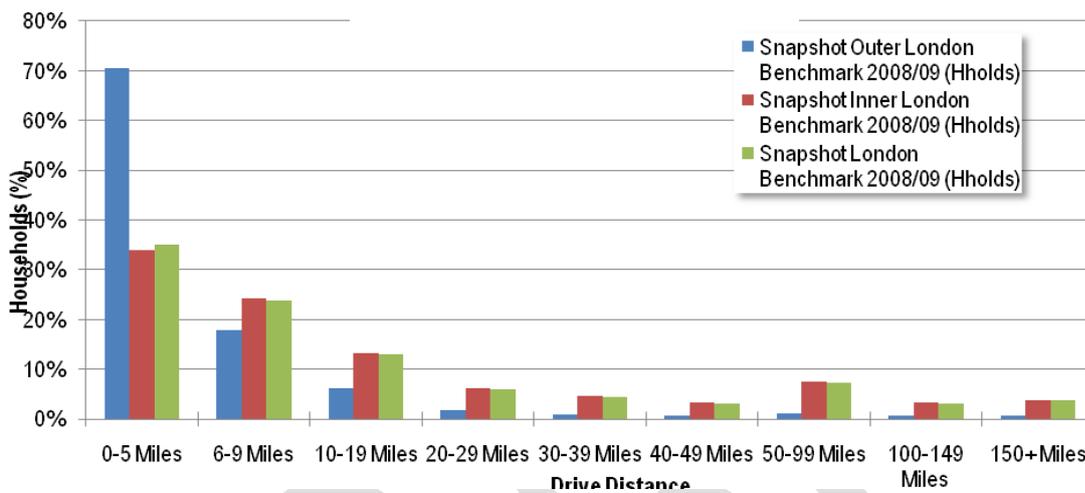
Source: Audiences London Snapshot data 2008/09

The audience data from Fairfield Halls shows while their audiences come from all over the country – Perth in Scotland is the only postcode where a ticket for Fairfield Halls has not been purchased – the audience is predominantly a local one.
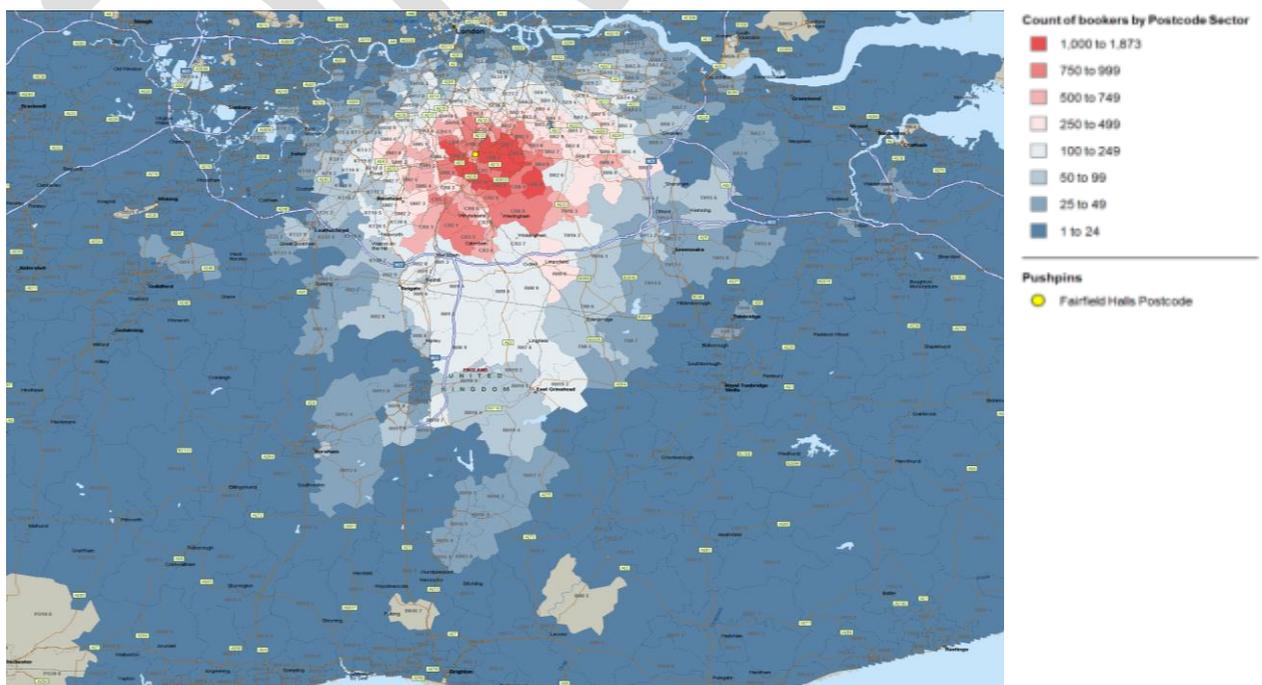
As demonstrated earlier in this report, there is a huge amount of cultural activity taking place in Croydon that falls below the radar and is not recorded in any official 'mapping'. Hundreds of residents are involved in all types of amateur activity – choral groups and orchestras, dance schools and groups, arts and craft groups – some at a semi-professional level. Croydon Council itself engages all sections of the community through its arts and heritage activities and festivals programme.

Thousands taking part in Council run cultural activities every year

There were 4,384 attendances at 281 Clocktower Arts Participation events in 2009/10. 153 events, attended by 1,643, were activities tailored to meet the needs of people with disabilities. 108 young people's events were attended 2,421 young people aged between 11 and 19. Perpanata young refugee theatre group worked with 16 young refugees at each of their 20 workshops between October 2009 and March 2010.

Croydon Film Festival saw 540 attend the film screenings and 55 attend the conference. The audience came from across 15 wards in Croydon with 25% of attendees coming from other London boroughs and 11% from Surrey.

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3. 5 Challenge of increasing audiences

With the vast majority of arts attenders only booking for venues once each year there appears to be a real challenge in developing loyal and regular customers.

With the high level of engagement in 'informal' arts and cultural activity across Croydon, the challenge for the venues is to provide space for and develop joint activities with the very culturally active members of Croydon's residents.

Figure 9: Number of repeat attenders in Croydon

Source: Audiences London snapshot data 2008/09
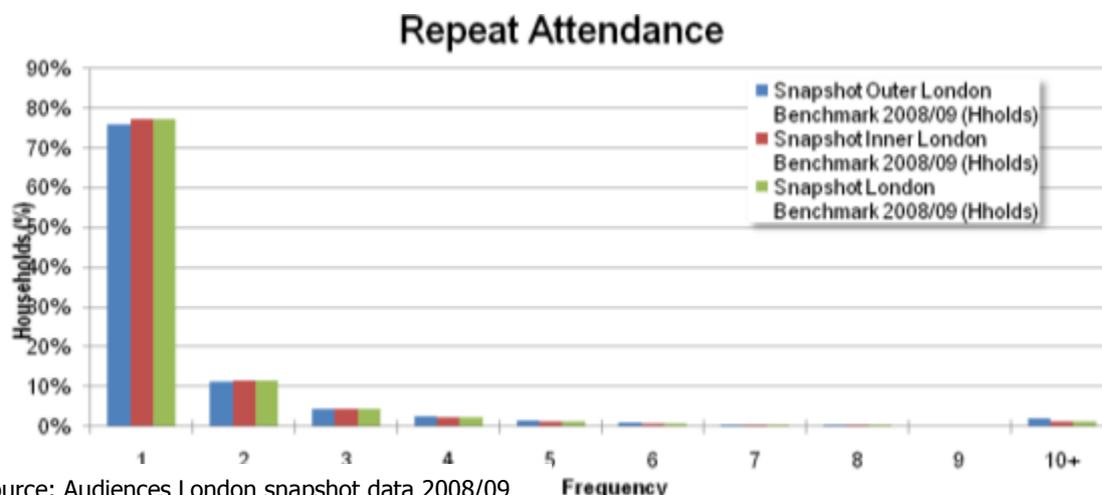
Generating income

Much of the cultural activity Croydon residents are engaged in is free.

However, Audiences London snapshot research shows that Croydon residents pay an average of £42.50 per transaction for visits to the 39 venues singed up to sharing booking data. This is at the lower end of spend by London residents.

Figure 10: Average spend per transaction by borough
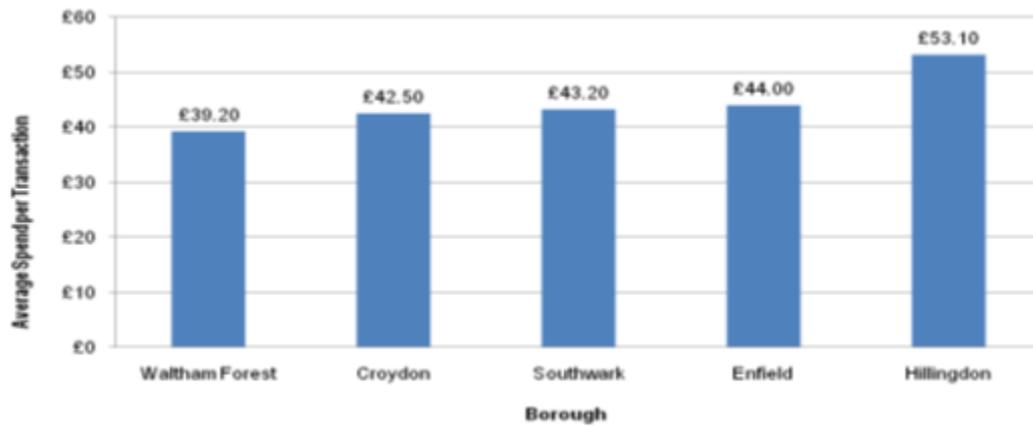
4. Croydon's Creative Future: 5 key shaping themes

For Croydon to move from its current position to one where culture and creativity help create and shape a vibrant and diverse place to live, work and visit will take a joined-up approach, involving a broad range of local stakeholders from government, education, business and the cultural community. The **5 shaping themes** described below, while each individually powerful and transformative, need to be seen and realised as part of an holistic and connected approach to culture which sees it as central to the economic, social and environmental transformation of the Borough.

4. 1 Theme 1: Realistic and aspirational sense of place

"Croydon, however, has a long way to go before it loses the look of one of the more successful Eastern bloc cities of the Sixties, or a Texas town on the verge of a Fifties oil boom." Jonathan Glancey, The Independent 1996

"The air of metropolitan sophistication has noticeably faded. The high-rise buildings that looked modern 50 years ago now look worn and distinctly brutalist; the open spaces around them are windswept and neglected. Many of the shop premises are vacant; signs decorating the lamp-posts announce that you are in a 'Drinking Control' zone." Daily Telegraph December 2009

Croydon suffers from often being negatively conceptualised as a place by local residents, businesses, visitors, other Londoners and the media. This is not a new phenomenon. David Bowie, who grow up in neighbouring Beckenham, sums up some of the sentiment that has stuck to the Borough:

"It was my nemesis, I hated Croydon with a real vengeance. It represented everything I didn't want in my life, everything I wanted to get away from. I think it's the most derogatory thing I can say about somebody or something: 'God, it's so Croydon!' It was gonna be the big second city to London, but it never came to be. Bits of it they put up, these awful faceless office blocks, complete concrete hell. I suppose it looks beautiful now... I haven't been back in a few years but I guess things take on a certain beauty if there's distance..." [9]

There is not space here to go in depth into the long history of how Croydon has attempted to tackle negative perceptions and realities, through numerous ambitious place-marketing, re-branding and visioning exercises. However the fact remains that sense of place and aspiration are, when comes to developing the Borough as a place for culture and creativity, incredibly important. We know from numerous towns and cities across the UK and internationally the transformative role that culture can play in how a place feels about itself and is viewed externally. Glasgow used its role as European Capital of Culture in 1990 as part of its process of reinvention as a post-industrial city, something Liverpool has gone

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[9] Interview in Q Magazine, October1999

some way in matching through its role as Capital in 2009. Each of the cities which competed to be UK Capital of Culture in 2013 was similarly hoping that culture could affect a transformation that stretches beyond a programme of cultural activity or renewed infrastructure. Phil Redmond, Chair of the Judging Panel, describes in his own style how he sees the role of culture as the catalyst to bring people together and engage them in the place and environment they live in:

"Getting people working together. Often people who have sat round the same tables but never really spoken. Looking at their cities in different ways. Not just redefining but simply remembering what they are. How they came about. Where their people came from and, recalling that any city is merely a collection of disparate minorities. A clutch or amalgam of urban villages."[10]

From the perspective of culture and creativity in Croydon, the issues surrounding sense of place and aspiration are nuanced. Like many other places it faces a 'chicken and egg' situation in that creative individuals and businesses (who could help transform the Borough) are currently not attracted to the Borough in enough numbers to become visible or really gain any leverage. Addressing this issue will require the development of 'signature' initiatives - such as a creative hub – which have the scale and presence to change perceptions and viewpoints

4.1.1 Current position: 'It is what it is'

Despite the negative perceptions surrounding the Borough, there are a significant number of strengths in relation to culture, sense of place and aspiration which can and should be built on. These Include:

- **'Urban realism':** Croydon's metropolitan centre ' is what it is' – there is no point hiding from the fact that in a UK context it is high-rise and often speaks of a brutal age of urban design and architecture. From the perspective of artists and creatives looking for space to work or an environment that is 'real' or 'cutting edge' this is not necessarily a bad thing. The existence and potential availability of empty workspace is more important than aesthetic nicety for someone starting out. Equally the challenging urban environment is exactly that to artists, who would welcome opportunities to re-interpret and re-cast spaces. The success of LA Machine in Liverpool with the giant mechanical spider or the challenge laid down by Rachel Whiteread with House show the potential that exists.

- **Urban, rural and village:** Croydon's diversity of environment, covering as it does suburban comfort in the south trendy 'urban village' and high-rise metropolitan living as well as an extraordinary richness of green space, makes it attractive from a lifestyle perspective for a cross-section of individuals. In terms of attracting creatives, it provides the mix of amenity which makes it attractive to those wanting family life and or access to a lively and buzzy nightlife. It distinctly un-homogenised and eclectic (contradictory even) mix of environment is far from bland or cloned

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[10] Phil Redmond, DCMS Website

– **District centres:** It is a cliché that at a local level London is really a mix of small villages, but in Croydon the distinctive identity of district centres as diverse as Coulsdon, Crystal Palace, New Addington, Norbury, Thornton Heath is critical to the Borough's sense of place. Crystal Palace, most obviously, shows already the impact on a relatively small centre that artists, independent bars and retailers and a real sense of individuality can have in making a centre attractive.

– **Trains, planes and trams:** Croydon's incredible transport links extend not just to fast train lines to the City and West End, but include its great connectivity to Gatwick Airport and now to the East End through the London Overground. The London Overground means that the area of London which has seen the biggest change partly driven by culture – Hoxton, Brick lane and Hackney – is now easily reached. With artists being priced out of the East End and some signs that the scene is becoming to 'corporate' and not cutting Edge, the ease of access to Croydon is something that can be built on. Equally, with international markets increasingly important, the excellent connections with the airport should provide an attractor to creatives.

4.1.2 Opportunities: Hubs, animation and signposting

The core opportunities for culture lie in developing a sense of place that is at once realistic and aspirational. Key to achieving this is **making use of what already exists.** The current economic climate means that funds for investment will be limited for the next five years at least. While this does present challenges, it does mean that greater focus has to be put on using existing resources and infrastructure. The opportunity exists in Croydon to create demonstrator projects which will attract attention inside and outside of the Borough which can prove potential the Borough ha for creatives and also what culture and creativity can do for the Borough. Potential examples of these include:

- **Creative Hub:** Developing a building in the Metropolitan Centre as an incubator/workspace for creative industries would start to re-position the centre from the perspective of the creative community. At our focus group with creative businesses it was strongly felt that a creative business hub was needed in the centre and not just in an 'obvious' location like Crystal Palace. Furthermore the experience of operators such as Rooks Books, who successfully run creative business workspace in Crystal Palace, provide excellent models and potential management leadership solutions. The Hub would ideally provide the scale and clustering seen in other developments in the Capital such as the Truman Brewery and could be a pop-up proposition in a space awaiting longer term development. Any such Hub would need to be connected to local Cultural infrastructure and the College to ensure that there was as much collateral development as possible.

- **Animation and Signposting:** Poor public realm is not just an eyesore it also can prevent people from engaging or participating in cultural activity. While Croydon is planning some major-works which will help address some of the deep routed issues around the public realm which connects Fairfield, The Clocktower and the main stations, there is real opportunity for artists to be involved in transforming routes and sign-posting in inexpensive and dynamic ways which would attract positive publicity and bring about change.

In addition to these two areas thought must be given to how the creative benefit from the **London Overground Line** can be maximised – perhaps through holding joint events with cultural providers along the line and through encouraging 'the culture line' to become a real entity through joint audience development and marketing. Croydon's popularity as a location for Film and TV shoots needs to be pulled to the fore more, especially as this is something that is partly caused by Croydon's Urban edge and great transport links.

4.2 Theme 2: Night-time Economy

"Croydon's night-time economy is essentially a drink industry economy...there is no non-drink environment to be found in town". Focus Group participant quoted in London's Nightime Economy, GLA report 2005

"Successful hospitality areas are alive during the day, as well as in the evening and night. They contain a blend of overlapping activities that encourage people to mingle and attractive places where spending and being are in balance. They respect and reinforce the character and identity of the area - its buildings, structures and features. They demonstrate flair and imagination in all aspects of design for the night." Purple Flag Handbook, ATCM

Croydon's Night-time economy should be a high-point economically, culturally and socially. It has the mix of venues, restaurants and bars, cultural infrastructure, transport links, demographic profile, local audience (with a majority of workers working in the Borough and not commuting) and more to have a diverse, sustainable, popular and eclectic night-life. However the reality is that it massively underperforms. Economically, venues remain shut or with an altered purpose which could be open and serving an audience (such as the Cartoon or Greyhound). Culturally, Fairfield Halls and other venues report the difficulty they have in attracting what should be core audience members to evening events because of perceptions surrounding safety in the centre. Environmentally, the upmarket bars and restaurants in the South-end suffer from being situated on a busy road with no possibility of outside seating and separated from the rest of the night-time offer. Perhaps most surprisingly of all, for the Borough which was the birthplace of dubstep, there are currently no venues regularly hosting events in the Borough itself.

The Purple Flag Scheme, which gives awards to town centres which are 'great areas for hospitality and entertainment at night' has a framework which describes the steps that need to be taken to achieve the status as part of a joined-up, multi-agency approach. This has four main elements- Wellbeing, Movement, Appeal , and Place. Intriguingly, the first two of these currently hold Croydon's Night-time economy back and the last two shows clearly the role that culture and creativity could have. Access to cultural venues at night is not as good as it could be due to the physical environment, which means that older people in particular are less likely to attend events than they otherwise would. While transport is excellent from the Borough outwards, internally getting from district centres to the Metropolitan centre can

pose a real challenge. In terms of appeal handbook states that "Successful destinations should offer a vibrant choice of leisure and entertainment for a diversity of ages, lifestyles and cultures, including families. They should contain a rich mix of public and private attractions. They should be vital places for both the day and the night." Anchored by Fairfield Halls and Clocktower, alongside other venues including the Warehouse and Green Dragon this could become a reality for Croydon. In terms of place, better signposting, animation of routes, use of public art, festivals and more could help define and demarcate the evening landscape as attractive, multi-generational and unique.

4.2.1 Opportunities: Matchmaking, music, travel and communications

A successful night-time economy in Croydon and a rich, buzzy cultural scene go together hand–in-hand. Cultural activity would help ensure that the town centre is used by a broader demographic of residents and visitors, representing the diverse communities of the town. While a more attractive and cohesive night-time leisure offer in terms of restaurants, bars and cafes would help develop the ambience and added-value that cultural attenders want as part of the night-out.

The example of cities engaging in the Purple Flag scheme and more widely internationally, show that through specific programmes and activities culture can play a game-changing transformative role in how people perceive and engage with their towns after dark. Successful examples range from the ambitious White Night concept of a once a year all-night cultural festival engaged in by cities including Brussels, Madrid, Montreal, Rome, São Paulo, Skopje, Toronto, and Leeds amongst others to the smaller scale such as the Community Theatre & Community Spirit initiative in Tooting, involving community theatre in directly tackling anti-social behavior through themes programming.

For Croydon our work identified four relatively quick-wins which could be put in place to develop the night-time economy through the use of culture:

- **Promoter/venue matchmaking:** The absence of Dubstep form the evening scene in Croydon is caused by several factors – lack of venues, existing venues being too conservative in the type of music they play and an apparently conservative approach taken promoters. One approach could be to develop a one-off **promoter/venue matchmaking event** which would promote croydon's venues to a promoters and artists alike to try and change perceptions.

- **Seed funding music nights:** Camden Crawl which began in 1997, now sees over 150 acts playing across 2 days, is the best known example of an area using live music to drive an upturn and reinvigoration of its nightlife. Its success is due to the range of venues that take place and the commitment to cutting edge artists. Camden Crawl was helped into being the success story it is today partly by some funding which allowed and encouraged venues to take commercial risks more experimental music. In Croydon a fund could be established using a mix of public funding, BID money and other sources to establish a night or weekend of music which would showcase venues and talent.

- **Marketing and Communication:** The level of sophistication and knowledge about of audiences for culture in London grows every year, as can be seen in the work of Audiences London. Coupled to this Venues themselves such as Fairfield Halls, have a high-level of knowledge about what their audiences will like and when they will like it. However in Croydon currently there does not seem to be as sophisticated a sharing and marketing of this knowledge between venues as there could be, meaning opportunity to collectively develop, grow and improve audiences is not pursued. Croydon's success as cultural magnet in the evening , will be down to a collective effort and all would gain from wider audiences drawn from a larger geographic area. Additionally a collective approach to developing engagement and participation with local people would be hugely beneficial.

- **Travel to venues:** Improving the routes to venues – through animation, art, night-time ambassadors – could be a relatively 'quick win' which would publicly demonstrate the commitment to culture. In turn venues themselves could become more permeable in how they think of themselves in relation to their environment through greater animation and signposting of their buildings.

- **5-7 activity:** With its large working population, Croydon is ideally situated to capitalise on the otherwise often dead after work period of roughly 5-7. Scheduling cultural activity in this period can help people fill in time before meeting friends or persuade them to engage with culture as there is no waiting around before it starts. Developing a 5-7 programme would also help break the barrier between day and evening and create a more animated and active scene.

4.3 Theme 3: Skills and education for the creative economy

As the largest London Borough by population, Croydon has the largest potential talent pool of young people in the Capital. With 108 schools, including 8 secondary schools specialising in the arts, the Brit School, Whitgift Hall and Croydon College it has a strong infrastructure for developing and engaging young people with culture and creativity. There is strong support for culture in the Borough's schools, especially at a primary school level. The 13 Extended schools clusters are also doing well, pushing arts activity into schools. Croydon's Music and Arts service is very well respected and proactive in delivering range of services to schools. Croydon College, offers potential for young people in the Borough to take their talent forward with its wide range of art and design courses which build on its heritage as Croydon Art College.

Other current strengths include the young people-led Arts Ambassadors group, which started in 2005 at the Clocktower , and now organises workshops and events across the Borough. Club Soda, which organises arts produced and run by young people with learning difficulties has a track record of success in producing quality and innovative work. The proliferation of Community groups, with over 100 spread across the arts with a strong focus on dance is particularly impressive. However there is currently the perception that there is much more that could be done to develop talent and engage young people in culture and creativity. Identified current weaknesses include:

- **Lack of a strategic approach to funding:** The current economic situation has only served to exacerbate a situation where successful programmes and activities were not funded to a point when they could become sustainable. Croydon Summer University, which ran courses for Young people in the summer holidays in music, dance, art and more is often cited as an example of a project which was initially successful but the withdrawal of funding meant it did not have the chance to embed.

- **Gaps in provision:** While there is good provision at primary school level, this tails of at secondary school. There is no 'central place' for 1013 year olds to access arts activities and generally KS 3-4 prove more difficult to engage. This is described as being caused by several factors including attitudes of teachers and difficulties working around the national Curriculum. Extended schools delivers activity outside of the school day, but without connection to activity within the school day.

- **Lack of progression routes:** Lack of information and incorrect perceptions mean that the Borough is not well served by Progression routes for young people from to school, to college or university and then to employment. There seems to be a lack of awareness of current opportunities, including the range of courses offered by the College which holds back young people.

- **Lack of a central hub for non-formal learning:** While it has many established community arts groups, it suffers from not having a hub organisation such as the Roundhouse, WAC Performing Arts and Media or CM. These organisations, which have established links with industry and formal education, provide the capacity, expertise and practitioner-led learning which has proved vital in widening access to the creative industries.

4.3.1 Opportunities: Knowledge and connectivity

The opportunities around nurturing talent and encouraging participation fall into three main areas:

- How can more opportunities for children and young people to engage with creativity and culture and be developed?
- How can more and better progression routes for talent be developed?
- How can stronger and more effective relationships between cultural providers, schools, further, higher and non-formal education?

Areas which could be explored include:

- **Knowledge and information sharing:** An online database of artists who work in schools would have the double benefit of providing opportunities for artists to develop their careers and making it easier for schools and extended schools to engage with culture. The Arts and Music Service event later this year for artists and schools is an excellent step.

- **Coordinated approach to progression routes:** Bringing together organisations that work with young people through to the age of 25 this would involve ensuring that the opportunities for young people to explore their creative talent in formal

education, through non-formal learning and beyond to further education and employment were more clearly understood and disseminated across the borough.

– **Shared programmes of activity:** The Clocktower currently offers apprenticeships work experience to young people interested in a career in the arts, but they have very limited capacity. Developing more opportunities for work-related learning across the Borough in cultural organisations should be a priority.

– **Creative and Media Diploma:** Starting in 2011 this will encourage participating secondary schools to be more active in developing their relationships with cultural organisations and businesses due to the demands of the programme. The models and relationships developed for the diploma should be used to spread this fresh approach to other aspects of learning beyond the diploma, which will only have limited reach to start.

4.4 Theme 4: A vibrant creative economy

"Croydon has a reputation as a monoculture (bars and nightclubbing and fighting). To lift ourselves out of it, we need to embrace all areas of culture (e.g. dubstep, grime and folk as a few) and provide platforms and support for emerging artists and creative businesses to PROFESSIONALISE their practice. Without professionalisation, Croydon either will just have hobby artists who don't or cannot get very far, or frustrated artists who leave to pursue other opportunities in other areas." Survey respondent

"Croydon Town Centre is already recognised as London's Largest 'Metropolitan Centre' and one of the Capital's two strategic office centres outside Central London." The London Plan

Croydon's success as a Borough is very much connected with its success as a place to do business. It has enjoyed many years as an important hub and base for multi-national companies and government departments. Currently it has a diversified economy with strengths across the board in Financial services, engineering, telecoms and more. It is currently home to the second largest workforce of any Borough in London, with a working population of over 160,000 putting it second behind Hillingdon (which is home to Heathrow). However the challenge for Croydon if the planned demographic growth of the Borough is to be made sustainable then new jobs will need to be created at a time when workforce numbers in the borough are actually in decline.

For Croydon to compete successfully in the future it will need to build on its current strengths in location, transport and amenity to grow a successful and sustainable knowledge economy. Can Creative Industries provide significant growth in the future and if so what are the incentives which will encourage creative businesses to move or grow in the Borough and what are the barriers that are currently in place?

As the mapping work conducted for this report shows, Croydon is home to just over 1,000 commercial creative businesses and over 300 not for profit creative organisations. Creative industries are thererefore a significant sector, employing around 4,700 people, 70% of them in businesses of 5 employees or less. However according to ABI data from 2005-2008 the numbers of those employed in creative businesses has declined, particularly in publishing, advertising, film and TV. What's more during this time, employment in the Creative industries in most other London Boroughs has increased – between 35 and 50% in the case of Bexley and on average by more than 20% across the majority of Boroughs. Croydon is therefore not just standing still when it comes to providing a home for creative businesses, it is seemingly go backwards compared to other London Boroughs. With the pressure on to increase employment numbers in the private sector as we emerge from recession, understanding how the creative sector, as part of a healthy knowledge economy, can be better fostered and supported in the borough is vital.

As a borough there is much which should make it an attractive base for creative individuals and businesses: the amount of young talent coming from its schools and the College, its excellent transport links, affordability of workspace, the size and scale of the overall economy and the strength of the cutting-edge underground and street culture scene. However, with the main exception of Crystal Palace –with its highly visible niche bars, independent retail artists studios and workspace feels like home to creative businesses – creatives in the Borough suffer from the lack of density, fragmentation and lack of clustering. While there is plentiful workspace in the Borough, there is very little that is geared towards the needs of creative businesses – in the sense that creatives would like to work alongside other creatives. The lack of progression routes for young talent and lack of support in terms of helping young talent professionalise and commercialise their talent after school or college is also seen as another reason that creatives feel inclined to leave the Borough when starting a businesses.

4.4.1 Opportunities: Welcome, support and celebrate

> *"It can feel quite lonely as a creative person working in Croydon and I envy other photographers based in some of the up and coming areas of London who have an opportunity to meet others and discuss work with them."* Survey respondent.

> *"I think Croydon has the potential to be known as a cultural borough if it encourages owners of empty / redundant spaces such as churches, shops, industrial units to allow the space to be rented cheaply to get people 'going' on their ideas."* Survey respondent.

With some signs that the creative hotspots in London over the past decade such as such as Hoxton and the East-end are becoming too expensive and two 'corporate', Croydon has an opportunity to position itself as a welcoming, affordable, dynamic and supportive base for creative businesses. The overall mix of the economy in the Borough – with the traditional strengths in corporate, professional and financial services – and the excellent connections with airports are both real assets for encouraging creative businesses. Attracting business (not just creative business) of any sort to locate in the Borough requires a range of factors to be in place – including logistics, locational factors, atmosphere and lifestyle factors – and

in making Croydon attractive to creatives care needs to be given that intellectual, emotional, social, economic and other factors are born in mind. The existence of 'sterile' under-utilised media centres in many parts of the country, built with the right intentions, but executed without the necessary attention to these fine-grain factors attests to this. There are numerous examples in London though – including the Truman Brewery, Chocolate Factory, Westbourne Studios - where substantial spaces have been developed which have attracted and successfully developed creative industries.

Options for boosting the creative economy in the short to medium term include:

- **Create a Central Hub:** Developing a central location as a hub for creative businesses would provide the clearest sign that Croydon was 'open for creative businesses'. The model for a hub could be adapted from the successful workspaces operated by Rooks Books, providing low –cost, basic but suitable workspace. Encouraging businesses to work together, sharing services and expertise would help develop the sense of community. The central hub would provide the focal point and scale of impact that could kick-start the process of getting creatives to see the potential of the Borough as a home for creative businesseses.

- **Develop a networked support strategy:** This would ensure that wherever you are based in the Borough as a creative, you are able to access support and markets. Croydon's strength in providing different environments, will appeal to different ages and types of creative individual and business, so connecting up the district centres and Metropolitan Centre is vital to providing an effective support structure.

- **Put up the welcome signs:** Croydon should see itself in competition with 31 other Boroughs to attract the creatives of today and the future. The more it can do to visibly welcome creatives to the Borough the better. This means developing an approach based on removing barriers and blockages such as lack of workspace or lack of support and emphasising the positives the Borough has to offer including distinctiveness, range of environment, excellent connections, strength of its wider economy and more.

4.5 Theme 5: Distinctive and dynamic cultural offer

"Of major concern to the Mayor are the particular issues and challenges facing those who live and work in the 'outer- London' boroughs...around recognition, audience development and resources shared by cultural professionals working in the designated outer-London boroughs that are noticeably prevalent, and warrant particular attention."
Cultural Metropolis, The Mayor's Draft Cultural Strategy: 2012 and Beyond

Croydon's current cultural offer has a number of distinctive strengths which can be built-on in the future. Centrally the Clocktower is a widely admired resource, combining library, cinema, museum, cafe and more, in a way that has been replicated in other places. Its museum in particular has an international reputation for innovative curation and active

engagement with local people. The David Lean Cinema offers independent programming and context for an audience that wants more from film than a multiplex could ever offer. Fairfield Halls, home of the London Mozart Players, has since 1962 offered a mix of entertainment in a building which is now a rare example of a major post-war concert venue. Decision is awaited on whether it will get the go ahead with a major revamp which will bring its facilities up to contemporary standards and expectations. The Warehouse theatre, a professional producing theatre with 100 seats, has for over 30 years offered a lively and contemporary mix of programming, outreach, youth work. The Ruskin square development will see the theatre benefitting from a new £5 million home and an intimate 200 seater theatre. Beyond the centre Croydon's cultural offer is more dominated by community groups as shown in our mapping, with a particular strength in Dance. 21 festivals and other events make use of Croydon's many parks and green spaces across the Borough.

The challenge for Croydon is to make the sum of the whole add up to more than the parts. Currently there is a real lack of connectivity across the cultural spectrum. This manifests itself in a variety of ways. While there is considerable information held on audiences by the leading cultural organisations in the Borough, information and knowledge is not regularly pooled or shared, meaning that developing a Croydon-wide approach to audience development is not possible. There is too great a divide between established culture and community culture, exacerbated perhaps by Croydon's geography and the split between the centre and the districts. Underground culture, represented by Dubstep, is not celebrated or supported with a lack of venues or programming to showcase this vital part of the Borough's cultural life.

All of Croydon's venues suffer from problems to do with the Night-time economy and the perceptions of Croydon. Venues do not reach the audiences they could because of concerns over safety and accessibility by some sections of the community. Other parts of the community feel that venues are not for them because they do not engage with the type of work or performance that they enjoy. While Croydon benefits from having a large workforce in the Borough and relatively small number of commuters, meaning that the potential audience for culture is not lessened by people having no time or energy after commuting, it also faces the challenge of the 'super-served' west–end and South-bank.

Croydon's cultural offer has to be seen in the context of London as a whole and the fact that within a 30 minute journey from central Croydon, a dense range of some of the most exciting culture in the world is on offer. What this means is that in developing a cultural offer that is distinctive, sustainable, engages local audiences (many of whom don't travel into London for culture), has the quality and uniqueness to draw in audiences from other Boroughs and outside the M25, a set of interlinked questions needs to be considered. These include 'hard' infrastructure issues around size, scale and type of venue as well as 'soft' issues around programming, audience development, ambience and the night-time economy.

4.5.1 Opportunities: Integration, sub-regional positioning and a broad spectrum approach

In developing a distinctive and dynamic cultural offer within the confines of an extremely tight funding situation, there are four main areas that our work suggest be pursued in the short term:

i) Development of integrated cultural manifesto: The Borough is reasonably well served by professional cultural infrastructure in the centre and community infrastructure in the District centres. However currently the Borough's offer does not reflect the size of the population or the potential of Croydon economically, demographically and culturally. What is required is the development of an integrated cultural manifesto which seeks to draw the maximum from the Borough's cultural resources while looking at them in the context of Croydon as an integral part of one of the most culturally-alive cities in the world.

ii) Joined-up approach to data, marketing and audience development: With such as wealth of information available, from venues and cultural assets as well as from Audiences London and Arts Council England, there is much to be gained from developing a joint approaches to using information and knowledge on audiences and market development. In particular this would enable Croydon as a whole to developed as a destination for culture with interlinked initiatives, programming and events linking centre and district.

iii) Digitisation, animation and the public realm: The recent rise of pop-up cinemas in disused petrol stations in London, is another example of how culture is being used to animate and breathe life into otherwise empty spaces. In Croydon, which suffers from empty buildings and some grim and uninviting public realm, engaging with artists in low-cost animation and creative activity would bring quick results. Developing a Borough digital cultural strategy could also be a powerful way of reaching new audiences and ensuring that the cultural offer was making the most of the potential for digital to change the way that culture is accessed and engaged with.

iv) Sub-regional hub: While considering Croydon's culture in the context of London is vital it is equally important to look outwards beyond the M25 and the Gatwick Diamond. Croydon, is set to exploit its excellent links to airports from a businesses and infrastructure point of view, but it should also consider the cultural and creative benefits that this brings. Different audiences brings with them different needs and the unique positioning of Croydon as an inner and outer Borough could be used to the maximum here.

5. Steps to the Future - 6 key drivers for a more Creative Croydon

The pressure of competition from other Boroughs and the general weakness of the economy means that not developing a clear strategy around creativity and culture will see Croydon fall further behind. Most importantly Croydon needs to have a strong and sustainable economy to provide jobs and quality of life for its residents and workers. It will have to focus on the growing sectors of the UK economy, which are primarily in the knowledge economy. Research by The Work Foundation[11] has shown that the acceleration towards knowledge economy jobs has only been increased by the recession. Croydon with its strengths in financial and professional services, engineering, public sector and international hubs is well placed to exploit this. Their research[i12] suggests that city growth and regeneration will be driven, not by property, retail and public sector investment but by growth in four main areas: creative industries, 'manu-services' (linking manufacture to services), low carbon industries, high-tech and high value-added networked services. As one of the key potential drivers of growth, it is critical therefore that culture and creativity are put at the centre stage of Borough planning and strategy, with every effort made to remove the barriers and blockages which will prevent the Borough fulfilling its potential.

There are six linked and overlapping drivers that need to be in place if Croydon is to become a real cultural and creative powerhouse, with a strong economy, vibrant cultural infrastructure and strong levels of participation from across the community :

- **Creative economy:** Concentration needs to be on three main areas. Firstly, building on what already exists. Strengths in Film and video (with 108 businesses) could be better exploited for example, with Croydon's urban landscape providing excellent background for filming and the proximity to major transport infrastructure making it logistically simple. Secondly, making Croydon a welcoming place to do creative businesses, through the development for instance of the Hub and providing support and opportunity for creatives. Thirdly, specialisation. This could be in the area of software, which with 183 businesses is clearly an area of strength and provides a cross-over withthe wider economy and the high growth, value-added networked services sector.

- **Creative People:** Not just through investing and supporting creative talent (though this is vital) but by enabling more of the Boroughs residents to participate in and enjoy cultural activity. Greater emphasis could be placed on connecting culture to social innovation and community regeneration initiatives.

- **Distinctiveness and place:** Croydon 'is what it is' and it should build on its real distinctiveness in terms of connectivity (to London, outside the M25 and

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[11] Work Foundation Briefing, 2010

[12] Work Foundation, No City Left Behind, July 2010

internationally), its diversity of environment providing something for almost everybody, its potential in terms of available workspace and its urban feel and realness. These are all strong assets which can make Croydon stand out in the race to attract creative people.

– **Digital and animation:** Croydon should develop a striking programme of digital and animation activity, to reinvigorate and challenge its urban spaces. The perception of its public realm, safety and crime issues, could be partly tackled through encouraging artists to 'reclaim the streets' in imaginative ways. A few well executed but in-expensive projects could let the wider world know that Croydon is open for creativity and encourage visits to cultural activity.

– **A whole Borough Approach:** The Metropolitan Centre and District Centres are together one of Croydon's greatest assets in terms of culture and creativity. The former providing the ease of access and scale needed to deliver a hub which could change perceptions and the latter providing the variety of environments, density and textures that different sorts of creatives thrive in. It requires a network approach to ensure that wherever you are in the Borough you can access information and support as you need it.

– **Leadership:** The type of leadership that is required will come from a shared vision, jointly held by key stakeholders from the Council, Cultural organisations, creative businesses, education providers and the wider economy. It is less about creating a new city brand and more about creating a Croydon where the some of the whole adds up to even more than the highly distinctive parts.

Appendix 1

SIC codes

DCMS Creative Industries mapping sector	SIC code 4 digit	4 digit description
Advertising	7440	Advertising
Architecture	7420	Architectural and engineering activities and related technical consultancy
Arts and Antiques	5248	Retail sale in specialised stores
Arts and Antiques	5250	Retail sale in second hand goods in stores
Fashion	1771	Manufacture of knitted crocheted hosiery
Fashion	1772	Manufacture of knitted crocheted pullovers, cardigans and similar items
Fashion	1810	Manufacture of leather clothes
Fashion	1821	Manufacture of workwear
Fashion	1822	Manufacture of outerwear
Fashion	1823	Manufacture of underwear
Fashion	1824	Manufacture of other wearing apparel and accessories not elsewhere classified
Fashion	1830	Dressing and dyeing of fur; manufacture of articles of fur
Fashion	1930	Manufacture of footwear
Fashion	7487	Other business activities not elsewhere classified
Film and video	2232	Reproduction of video recording
Film and video	7481	Photographic activities
Film and video	9211	Motion picture and video production
Film and video	9212	Motion picture and video distribution
Film and video	9213	Motion picture projection
Leisure software	2233	Reproduction of computer media

Leisure software	7221	Publishing of software
Leisure software	7222	Other software consultancy and supply
Music and performance	2231	Reproduction of sound recording
Music and performance	9231	Artistic and literary creation and interpretation
Music and performance	9232	Operation of arts facilities
Music and performance	9234	Other entertainment activities not elsewhere classified
Music and performance	9272	Other recreational activities not elsewhere classified
Publishing	2211	Publishing of books
Publishing	2212	Publishing of newspapers
Publishing	2213	Publishing of journals and periodicals
Publishing	2214	Publishing of sound recordings
Publishing	2215	Other publishing
Publishing	9240	News agency activities
Radio and Television	9220	Radio and television activities
Additional SIC codes from DET		
	3630	Manufacture of musical instruments
	9251	Library and archive activities
	9252	Museum activities and preservation of historical sites and buildings
	9253	Botanical and zoological gardens and nature reserve activities
	9261	Operation of sports arenas and stadiums
	9262	Other sporting activities

Consultees – <mark>to be added</mark>

Focus Group attendees – <mark>to be added</mark>

Technical appendix – <mark>to be added</mark>