



West Midlands Cultural Sector Economic Snapshot (Nov 2009)

Produced by the West Midlands Cultural Observatory in association with Advantage West Midlands (Tourism) and the Cultural Research & Intelligence Group (CRAIG).

1 Key Findings

1. Visitor volume and sales for many (customer facing) cultural organisations in the West Midlands may have improved since the onset of the recession and some may now actually be in a better position (in this respect) than they were prior to the recession. The increase in Britons 'holidaying at home' over the summer months is likely to have contributed to this trend.
2. There is evidence to suggest that domestic visitors are saving money on accommodation rather than on cultural activities and this may be affecting the West Midlands accommodation sector disproportionately.
3. Similarly, there is some evidence to suggest that nationally, consumers are choosing to save money on cultural retail products. Household expenditure on cultural products decreased at a rate that exceeded the average, suggesting ongoing issues for commercial product manufacturers (despite a more positive outlook for manufacturers generally).
4. There is some evidence to suggest there has been renewed recruitment activity within the region's cultural sector, with numbers of advertised vacancies now reaching a level that is more comparable to levels seen prior to the recession.
5. Local authorities are having to make difficult choices as pressure mounts on them to save money. This carries with it implications for the region's cultural sector, including reduced funding for cultural services leading to gaps in provision.

2 Market Intelligence

2.1 Tourism / Visitor Attractions

2.1.1 Regional intelligence

6. [Quarterly England Attractions Monitor \(April - June 2009\)](#) - West Midlands visitor attractions recorded an increase in visitors (+19%) during the Apr-Jun quarter compared with the same quarter in 2008. This continues to compare favourably with the national average (+15%). Nationally, around a half of attractions (49%) reported that their business confidence for the Jul-Sept quarter was higher than it had been during 2008 (only 14% reported lower business confidence). The main factor contributing to business optimism amongst attractions was a perceived increase in the domestic holiday market.
7. [UK Tourism Survey \(April - June 2009\)](#) - the West Midlands saw a slight increase in levels of overnight domestic tourism visits (+1%), but a decrease in related expenditure (-16%) during the Apr-Jun quarter. Unlike the previous two quarters, this compares unfavourably with the national average in both cases. The decrease in expenditure is, in all likelihood, linked to the decrease in 'average length of stay' (-22%) which is greater than the national average decrease (-3%).

Given that respondents to our own survey have been reporting improved revenue since the Apr-Jun quarter (see section 3), it can be speculated that domestic visitors are saving money on accommodation rather than on cultural activities when spending time in the region. The decrease in 'average length of stay' in the West Midlands was the most marked of any region (although most regions did see a reduction). Taking into account the national reduction in accommodation service prices since September 2008 (see section 8), it can be suggested that the trend for people to save money on accommodation is happening across England, but may be affecting the West Midlands accommodation sector disproportionately.

2.1.2 National intelligence

8. [UK Occupancy Survey \(July 2009\)](#) - bedspace occupancy in accommodation establishments in England in July was 54%, the same as it was during the equivalent period in 2008. The average margin of difference in occupancy for the May-Jul quarter (-1%) marks an improvement on the Jan-Apr 2009 (-2%) rate and on the Oct-Dec 2008 (-5%) rate, suggesting that the situation may be gradually improving in this respect.

2.2 Performing Arts

9. In their recent [dance mapping report](#) for Arts Council England, Burns & Harrison (2009), suggest that ‘*resource dependency*’ within the non-commercial dance field makes some dance organisations particularly vulnerable to the kind of changes in funding levels seen during a recession. Despite short-term issues, the report suggests there may be significant long-term opportunities for the national dance sector, borne out of the increasing political awareness of how dance benefits society¹.

2.3 Museums & Galleries

10. [Recent research](#) published by The Art Fund suggests that the recession has caused an increase in visits and sales for UK museums and galleries. Of the 225 UK museums and galleries that took part in the survey research, 50% had seen an increase in visits and 45% had seen a knock-on increase in trading income. (*This result corresponds with the results of our own survey - see section 3.2 and [previous snapshots](#)*). Respondents cited the increase in ‘holidaying at home’ over the summer, the weather and strong exhibition programmes as key reasons for these trends.
11. The increase in footfall and sales is balanced by evidence of cuts to some museums and galleries’ core income sources. For example, 34% of local authority-funded museums had seen a cut in council funding and 41% of all respondents had seen a cut in investment income. Institutions that receive public funding were less affected, with 26% experiencing cuts. The instability of core income sources has left some museums and galleries with more volunteers and less paid staff. Many respondents were also expecting to have to scale back exhibitions in the coming year.

2.4 Urban design

12. The significant drop in heritage ‘planning applications decided’ in the West Midlands since last year (-50%) reported in the recent English Heritage (2009) Heritage Counts ([West Midlands regional summary](#)) suggests a drop in the volume of planning applications. This is borne out by national [statistics](#) which indicate a decrease (-21%) in general planning applications received by district level planning authorities in the Apr-Jun 2009 quarter (compared to the same period of the previous year).

¹ Burns & Harrison (2009) *Dance Mapping: A window on dance 2004-2008*, for Arts Council England, p57-8

13. The decrease in planning applications is likely to be associated with the recession and more specifically the 'credit crunch' according to [recent research by Public Art Online](#) which sheds light on the current situation for urban design professionals. As part of the research, Urban Splash CEO Nathan Cornish commented that '*developers are being hit twice by the banking crisis - banks won't lend to developers to build, and equally won't lend to the occupiers to buy*'. As the author notes, the slowing of development activity is likely to have negative consequences for public art commissioning and has already '*severely hit*' architects.

2.5 Historic environment

14. The [national Heritage Counts report](#) includes a dedicated section on the 'historic environment in the recession'. In line with regional English Heritage visitor data reported in last quarter's [snapshot](#), nationally there has been an increase in visitors to English Heritage sites during the first half of 2009/10 associated with '*the large number of British people taking holidays at home, particularly weekend breaks and day trips*'. The overall message, however, is mixed, not least due to the sharp curtailment in available grant awards from Heritage Lottery Fund.

3 Cultural Facilities Survey (Jul - Sept 2009)

3.1 Profile of respondents

15. A total of 31 West Midlands cultural organisations completed surveys this quarter: 1 local authority arts and heritage division (included specific results for 1 visitor attraction with a historic theme, 1 performing arts organisation, 1 screen organisation), 1 other visitor attraction with a historic theme, 1 other screen organisation and 6 other performing arts organisations, 1 local authority performing arts division, 3 historic house/museums, 3 arts centres, 1 local authority sports division (incorporating 4 leisure centres), 1 local authority museums service (incorporating 3 museums and 1 museum/art gallery), 5 other museums, 1 local authority cultural events division, 3 library services (1 incorporating 55 libraries and 1 art/craft gallery and 2 incorporating an unknown number of libraries), 2 other art/craft galleries, 1 sports project and 1 screen sector network development organisation.

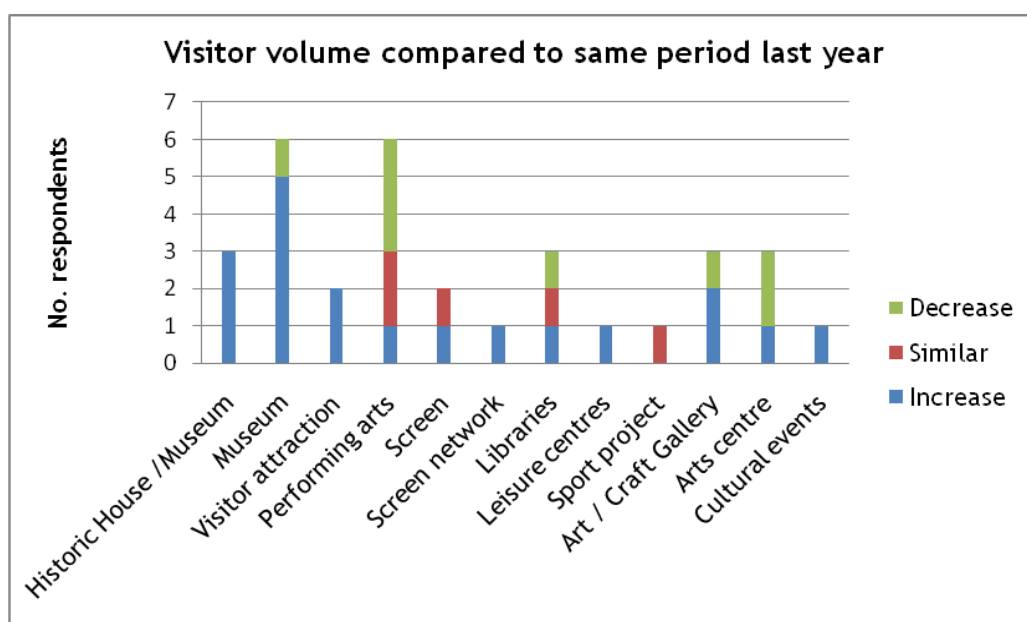
3.2 Results snapshot

16. During Jul-Sept, the majority of respondents (59%) saw an increase in the number of visitors (compared to the same period 12 months ago), 25% saw a decrease in visitors and 16% maintained a similar level of visitors. Revenue followed a similar pattern to audiences. The majority of respondents (68%) saw an increase in revenue, 23% saw a decrease in revenue and 9% maintained similar levels of revenue².

17. As shown in the chart below, the following types of organisation tended to see visitor numbers increase:

- historic houses / museums,
- museums,
- visitor attractions (with historic theme),
- screen sector network³,
- leisure centres,
- cultural events.

Decreases in visitor volume occurred in the majority (2) of the arts centres and half (3) of the performing arts organisations.

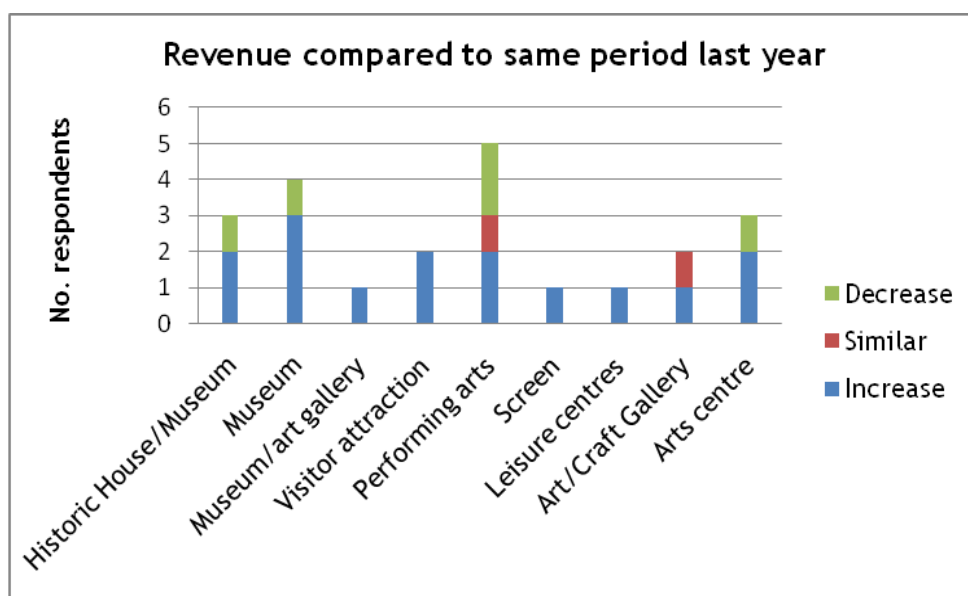


Source: West Midlands Cultural Observatory (2009) Cultural facilities survey, quarter 3

² Visiting and revenue has been classified as 'similar' to the previous year where there was no more than a 2% difference.

³ Note: this refers to the number of online 'unique site visits'.

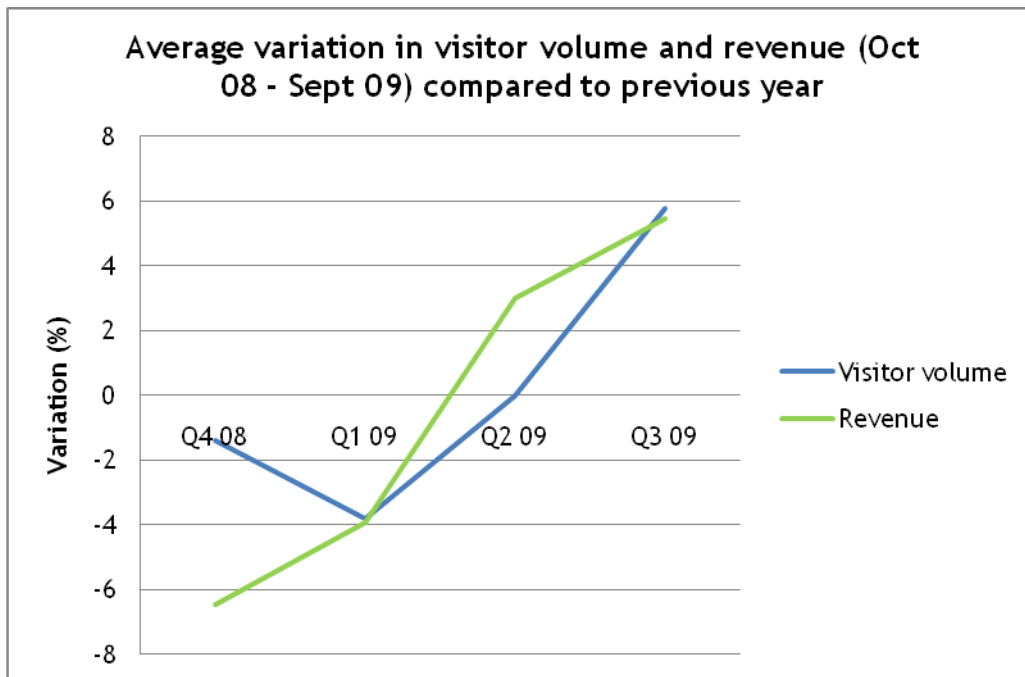
18. Revenue from sales followed a similar pattern to visitor volume with the exception of historic houses / museums (1 of which saw a decrease in revenue despite seeing an increase in visitors), performing arts organisations (1 respondent had seen an increase in revenue despite a decrease in customers) and arts centres (1 had seen an increase in revenue despite a decrease in customers). In some cases, these apparent anomalies are explained in the commentary provided by respondents; for example, the performing arts venue that achieved an increase in revenue (despite a decrease in customers) explained that a ‘*programme review and increase in participation fees for the autumn term*’ had contributed to this result.



Source: West Midlands Cultural Observatory (2009) Cultural facilities survey, quarter 3

19. Survey results from previous quarters have suggested that the recession may boost footfall at some types of cultural organisations and reduce it at others. This quarter’s results continue to suggest that some performing arts venues may be struggling to attract the same level of custom as was achieved prior to the recession. A shift in results for other types of organisation is notable. For example, arts centre respondents reported decreases in visiting and revenue from sales during quarter 2 (Apr-Jun), whereas this quarter some arts centres have reported positive results. Due to the small sample size however, more research is needed to establish how representative these trends are. **It is also worth noting that self-generated income from sales does not represent total income for cultural organisations that are subsidised through other income sources. With this in mind, a question associated with core funding will be incorporated into next quarter’s cultural facilities survey.**

20. As shown in the chart below, for the Jul-Sept 2009 quarter, the average (median) change in levels of revenue (+6%) and visitors (+6%) compared favourably to all previous quarters. It can be tentatively suggested that customer footfall and sales for many (customer facing) cultural organisations in the West Midlands has improved since the onset of the recession in October 2008. The data suggests that some cultural organisations may actually be in a better position (in this respect) than they were prior to the recession, having attracted more visitors over the summer months than was achieved the previous year.

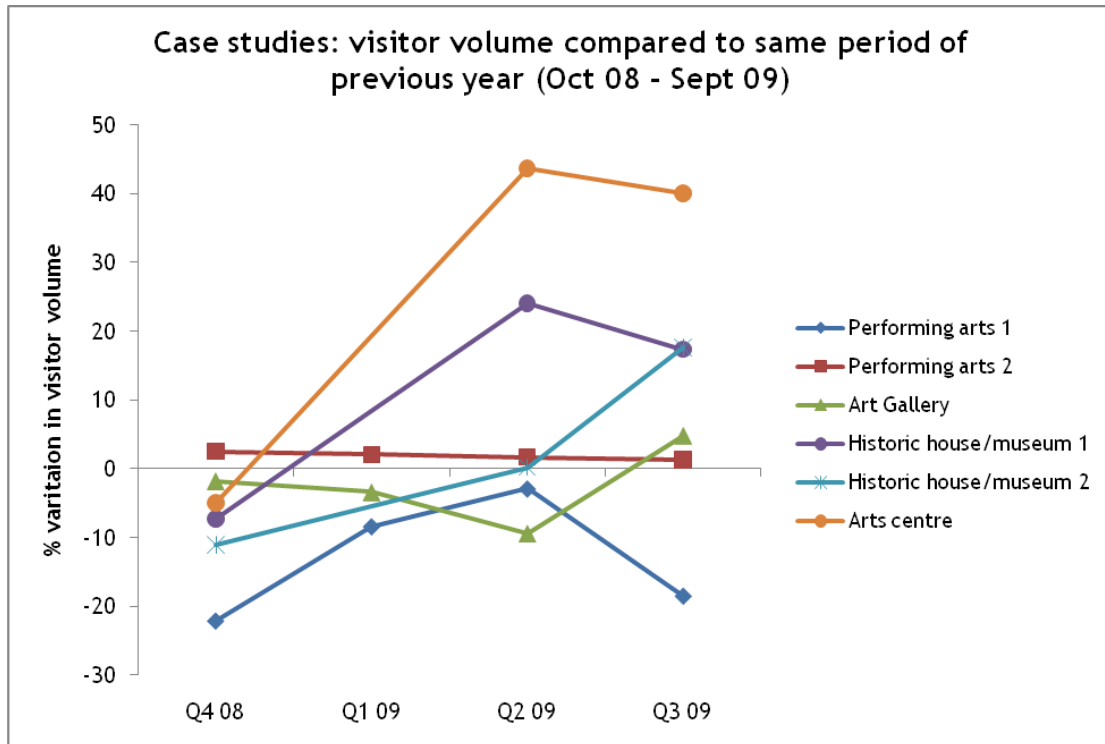


Source: West Midlands Cultural Observatory (2009) Cultural facilities survey, quarter 4 (2008) - quarter 3 (2009)

3.3 Case studies

21. This section documents information on visitor numbers and revenue within a handful of case study organisations (6) that have completed the survey from the start. By tracking (in detail) the trends for a few organisations, it is possible to appreciate the effect of the recession on individual organisations over time, showing some of the 'stories behind the trends'.

22. The line graph below shows changes in visitor volume (compared to the same period during the previous year) within case study organisations over the past 12 months⁴. In line with the overall survey findings presented in section 3.2, visitor numbers during quarter 3 either remained broadly consistent with the previous quarter or increased among the majority of case study organisations, to the point where all but 1 organisation reported a positive visitor variation compared to the previous year.



Source: West Midlands Cultural Observatory (2009) Cultural facilities survey, quarter 4 (2008) - quarter 3 (2009)

23. Revenue data for all six case study organisations is only available for the two most recent quarters. As demonstrated in the table below, revenue levels during Jul-Sept (quarter 3) compared favourably to the previous quarter's results for all organisations.

Name of organisation	Quarter 2 2009: % variation in revenue compared to the same quarter 12 months ago	Quarter 3 2009: % variation in revenue compared to the same quarter 12 months ago
Performing arts 1	-4	+2
Performing arts 2	+3	+25
Art Gallery	+8	+18

⁴ Note: 3 of the case study organisations did not provide data for quarter 1 2009 (the 2 historic house/museums and the arts centre) - these organisations have 3 rather than 4 data-points on the line graph.

Historic house/museum 1	+18	+22
Historic house/museum 2	+15	+17
Arts centre	+25	+33

3.4 Trading conditions overview

3.4.1 Customer confidence

24. To gauge audience ‘confidence’ a question was included which asked if there had been any change to the ratio of people just ‘turning up’, compared with those booking ahead (if confidence was low, a decrease in advance bookings could be expected).
25. Of the 19 organisations that supplied information, 9 reported no change in booking patterns (47%), 4 organisations reported a decrease in advance bookings (21%), 2 reported an increase in advance bookings (11%) and 2 reported that they had noticed an increasing trend for people that have booked not turning up (11%) - something which is perhaps comparable to the trend for an increase in cancellations reported by one screen venue respondent in the quarter 2 survey.
26. Of the two remaining respondents, one mentioned that they had seen an increase in the number of groups using their facility but that groups “*had less people in them*” and one commented that bookings were being made about 10% closer to the event than usual.
27. These results suggest that customer confidence may have increased slightly since quarter 2 (Apr-Jun 2009) in that 65% of respondents reported that there had either been no change in advance booking patterns compared to the previous year or that advance bookings had increased during quarter 3 (Jul-Sept 2009), compared to 46% during quarter 2 (Apr-Jun 2009). Confidence has yet to return to the levels that were evident in quarter 4 (Oct-Dec 2008), when 91% of respondents reported no change or an increase in advance bookings.

3.4.2 Supplier behaviour

28. Of the 22 organisations that provided information about supplier behaviour, 12 reported that there had been no change in behaviour (55%). Remaining respondents mentioned various changes including suppliers chasing payment more promptly and/or asking for advance payment (7), increasing prices (4), ceasing trading (2) asking for cash payment (1) and reporting cashflow problems (1). 1 respondent also mentioned that producers had begun to be more open to negotiation this past quarter:

“Incoming shows have tended more towards guarantees rather than box office splits. This trend does now appear to be changing with producers much more willing to show flexibility and accept splits for events being programmed for next year”.

(Arts centre, Herefordshire)

3.4.3 Sector response

29. Of the 23 respondents that provided information about new initiatives, the majority of respondents (18) reported that they had made changes to their service / launched new products and projects in order to attract more custom (78%)⁵, but only a minority of respondents (4) implied that changes had been made as a direct result of the recession (22%), suggesting that initiatives may well be routine rather than reactive. Changes made by multiple respondents included: new or revamped services (8), introduction of new ticket packages (3), new pricing (3) and fundraising activity (2).

3.4.4 Anecdotal insights

30. Respondent organisations provided the following qualitative comments, all of which provide further insight into how the recession has influenced trading conditions for the region’s cultural sector:
31. *“Our forecasts for this year assumed that the UK leisure industry would be buoyant [...] we can only assume that our assumptions were correct”*
- (Visitor Attraction, The Black Country)
32. *“We seem to have had more people visiting the area who would normally have gone overseas for their holidays”*
- (Museum, Herefordshire)
33. *“Strangely it seems that we are better off this year than last year [...] the small amount of research we have undertaken seems to show that seeing a film is still a night out but is perhaps cheaper than going out for a meal”*
- (West Midlands-based local authority arts and heritage division)
34. *“Our takings have been slightly better [...] which has been due more to efficiency savings than extra business”*

⁵ Note: this includes one organisation that talked about sticking to products and services that have a ‘*track record of success*’ that do not carry ‘*financial or audience development risk*’. This has been interpreted as a change from normal (more speculative) programming.

(Arts centre, Birmingham)

35. *“Those that did pay the entry fee were not spending or reduced their average spend in the shop”*

(Historic house/museum, Worcestershire)

36. *“It is clear that trust and charitable funders are under considerably greater pressure [...] many new types of agencies (e.g. universities, churches, development agencies, local authorities) are turning to the charitable funding sector as alternatives to public and other traditional sources of funding”*

(Creative media/screen organisation, Herefordshire)

37. *“Core funding for the arts is under review [...] which will seriously impact on the arts organisations we fund through Service Level Agreements”*

(West Midlands-based local authority cultural events division)

38. *“Cuts in budget for the organisation will mean higher charges for customers”*

(West Midlands-based local authority performing arts division)

39. *“People are demoralised in the work force. There are threats of job losses”*

(Art/craft gallery, The Black Country)

40. *“Audiences [are] more ‘risk-averse’, requiring more reassurance that a good night out is on offer before booking”*

(Performing arts venue, Staffordshire)

41. *“Less commercial work coming in means companies have less time and money to invest in narrative-based or artistically inclined animation”*

(West Midlands-based creative media/screen network)

4 Local authority budget cuts

42. As noted by [Burns & Harrison \(2009\)](#), local authorities are having to make some ‘*difficult choices*’ as pressure mounts on them to save money. According to recent work by Audit Commission for example, 50% of local authorities would consider cutting cultural and leisure services to save money⁶.
43. In addition to evidence that has emerged through our own survey (see section 3.4.4, paras 37-38), anecdotal evidence from cultural agencies in the West Midlands⁷ continues to suggest that proposed local authority efficiency savings will affect cultural services:
- A policy of not replacing conservation / planning staff at some West Midlands local authorities has created concern within the historic environment sector about future capacity to process planning applications.
 - There is concern within the built environment sector that a policy of not replacing development control officers in local authority planning departments may have a negative impact on design quality.
 - Within the museums, libraries and archives sector there is particular concern about the risk of library closures (already taking place in some local authorities). In some instances innovative solutions are being considered to sustain services such as ‘unmanned’ library points and co-location. (*Recent research by The Art Fund has also suggested that some museums and galleries have had to decrease paid posts due to budget cuts - see section 2.3*)
 - There is evidence that some local authorities have had to undertake a review of sports facilities and services. In some cases this may mean that older facilities are sold to allow investment in new facilities co-located on school sites. In these cases, short term gaps in provision are seen as a real probability.
 - There has been a reduction in arts development staff within some local authorities. There is evidence of an arts budget review taking place within one West Midlands-based local authority. There is also awareness within the sector that local authority arts funding and Arts Council England funding often sit together: if one is reduced, the other may be compromised.
44. Where possible, the DCMS agencies (MLA, Arts Council England, Sport England, English Heritage) are working with local authorities in an advisory capacity to talk through service provision options and to ensure that a sound rationale for cuts to cultural services has been established.

⁶ Cited in Burns & Harrison (2009) *Dance Mapping: A window on dance 2004-2008*, for Arts Council England, p56

⁷ DCMS Agencies Officer’s Group (October 2009)

Note: DCMS agencies would welcome contact from any local authorities about to undergo a review of cultural services.

45. In the context of widespread actual and rumoured cuts to public sector cultural budgets, Dame Liz Forgan, Chair of Arts Council England, has called on the arts sector to think strategically:

‘The real challenge for the arts sector is not to ask ‘what is the government going to do to help us?’ but ‘what can we do to help the country weather and recover from this downturn? Showing that we can make a real contribution in even the most difficult of times will be the best case we can make for continued public investment in the arts through - and just as importantly - beyond the recession.’

Dame Liz Forgan, Chair of Arts Council England, April 24th 2009⁸

46. Dame Liz’s comments echo the argument presented by IDeA’s Martyn Allison in his [recent essay](#). As noted in last quarter’s snapshot, Allison suggests that presenting a coherent, ‘clear and evidenced set of justifications and arguments demonstrating the contribution the [cultural] sector can make to delivering council[s] longer term priorities’ will be the most effective way of protecting local authority culture budgets.

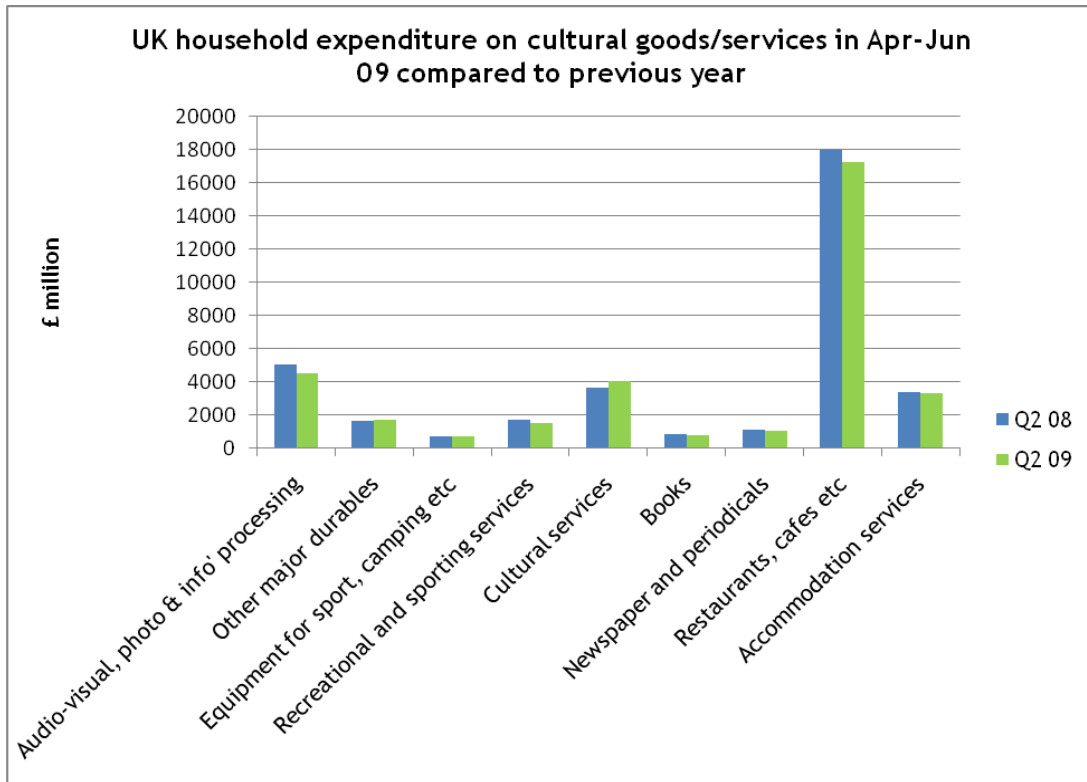
5 Household expenditure

47. [Consumer Trends \(Apr-Jun 2009\)](#) - expenditure by UK households on cultural goods and services in Apr-Jun 2009 had decreased compared to the previous year (-3.5%) and compared to the previous quarter (-1.9%). In both cases, the rate of decrease exceeded the average for all items which was -2.6% and -0.2% respectively⁹.

⁸ Cited in: Burns & Harrison (2009) *Dance Mapping: A window on dance 2004-2008*, for Arts Council England, p38

⁹ The definition of cultural goods/services adopted by the West Midlands Cultural Observatory excludes some products that are categorised as being part of ‘recreation and culture’ in the Consumer Trends publication, namely: ‘games, toys and hobbies’, ‘gardens, plants and flowers’, ‘pets and related products’, ‘veterinary and other services’, ‘games of chance’, ‘stationery’ and ‘canteens’.

48. The chart below compares expenditure on cultural products in the Apr-Jun 2009 quarter compared to the same quarter of the previous year. Compared to the previous year, there has been a particular reduction in spending on recreational and sporting services (-12%), audio visual goods (-10%), newspapers and periodicals (-6%) and books (-6%). Only spend on cultural services (+10%) and other major durables¹⁰ (+4%) had increased compared to the previous year.



49. Broadly speaking, these results corroborate with the findings of previous [snapshots](#). For example, our survey found local customer-facing cultural organisations have generally seen improved sales (compared to the previous year) since the Apr-Jun 2009 quarter (see section 3) which would seem to correspond with the increase in spend on ‘cultural services’ nationally.
50. More research is needed to establish the reasons behind the decrease in spend on ‘recreational and sporting services’ (something which has not been the particular focus of previous [snapshots](#)). The small amount of evidence collated by the West Midlands Cultural Observatory on this topic would seem to suggest that spend on commercial leisure and sport services such as sports matches may be where the decrease is occurring¹¹.

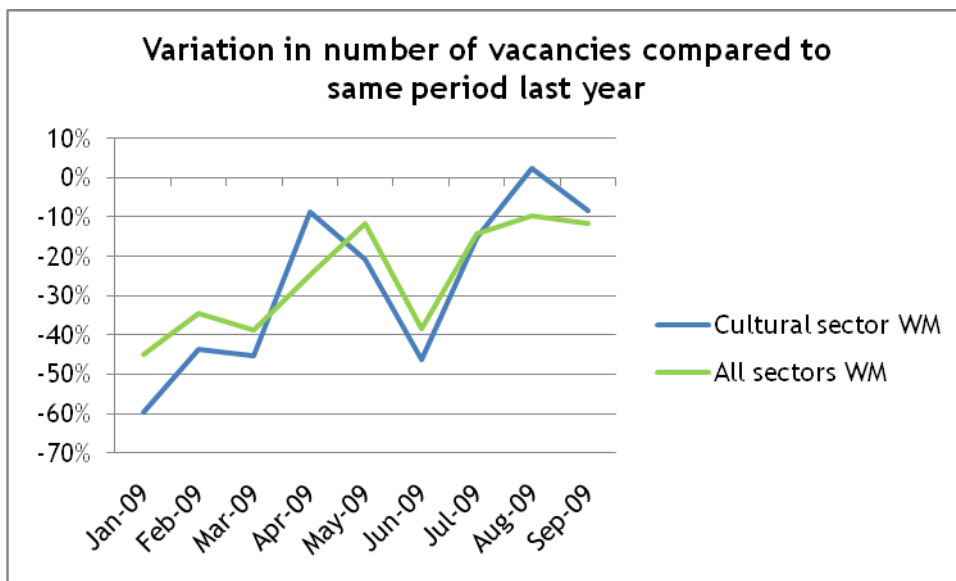
¹⁰ Note: the ‘other major durables category includes the following: ‘major durables for outdoor recreation’, ‘musical instruments and major durables for indoor recreation’ and ‘maintenance of other major durables’.

¹¹ See [Jan-Mar snapshot](#), section 2.3.

51. In general, it can be tentatively suggested that consumers are saving money on cultural retail goods but continuing to spend money on cultural activities. Given the more positive outlook for manufacturing sector businesses generally (see the latest results of the Birmingham Chamber of Commerce Quarterly Economic Survey in section 9), it is arguably of increasing importance that the specific experience of cultural goods manufacturers is highlighted.

6 Vacancy Count

52. As shown in the line graph below, the number of cultural vacancies advertised through JobCentre Plus¹² in August and September 2009 (compared to the same period of the previous year) compared favourably to the average for all sectors in both cases.
53. The number of cultural vacancies advertised in the Jul-Sept 2009 quarter, although still below last year's levels (-7%), was certainly more comparable to the corresponding 2008 figures than the Apr-Jun quarter (-27%) and could be indicative of renewed recruitment activity within the sector.



Source: Jobcentre Plus, January - Sept 2009

¹² Note: only certain cultural jobs are likely to be advertised through *Jobcentre Plus*. For example, the vacancy data may be particularly useful in determining the availability of low-skilled jobs in the hotel and restaurant industry, but less useful in determining the availability of high-skilled / senior job vacancies.

7 Employment

54. Quarter 3 2009 Labour Force Survey data is due for release mid-November 2009. Once this data is available, it is envisaged that a supplementary employment update paper will be published on the usual West Midlands Cultural Observatory [recession web page](#).

8 Cultural Shopping Basket - September 2009

55. The latest [Consumer Price Indices](#) data suggests the following trends relating to cultural goods and services:

- In September 2009, the prices of the majority of (non-audio-visual¹³) cultural goods/services had increased compared to the previous year to a level that exceeded the average price increase for all products¹⁴. In September, the average price increase for all products was low (+1.1%) and was exceeded by package holidays (+6.2%), newspapers and periodicals (+4.5%), major durables for in/outdoor recreation (+4.2%), books (+3.6%), recreational and cultural services (+3.5%), equipment for sport and outdoor recreation (+2.7) and restaurants and cafes (+2.2%).
- Of the non-audio visual cultural goods/services, only the accommodation services price variation compared to the previous year (-1.7%) was lower than the average for all products. In fact, since September 2008, the price of accommodation services has decreased compared to the previous year suggesting accommodation businesses may have been discounting prices during the recession.

56. As noted in the [Oct-Dec snapshot](#), increases / decreases in price tend to be influenced by the following factors:

- The cost of producing goods and services. For example, improvements in technology may mean that a company is able to reduce the cost of production and therefore decrease sale price.
- Demand for goods and services. For example, increasing demand may cause firms to increase prices.
- Market competition. For example, increased competition from similar companies may cause companies to decrease prices.

¹³ Note: The trend for year-on-year audio-visual equipment price reductions actually predates the recession and is an ongoing feature of Consumer Price Indices results, suggesting that price reductions may be a fundamental aspect of the audio-visual equipment sector.

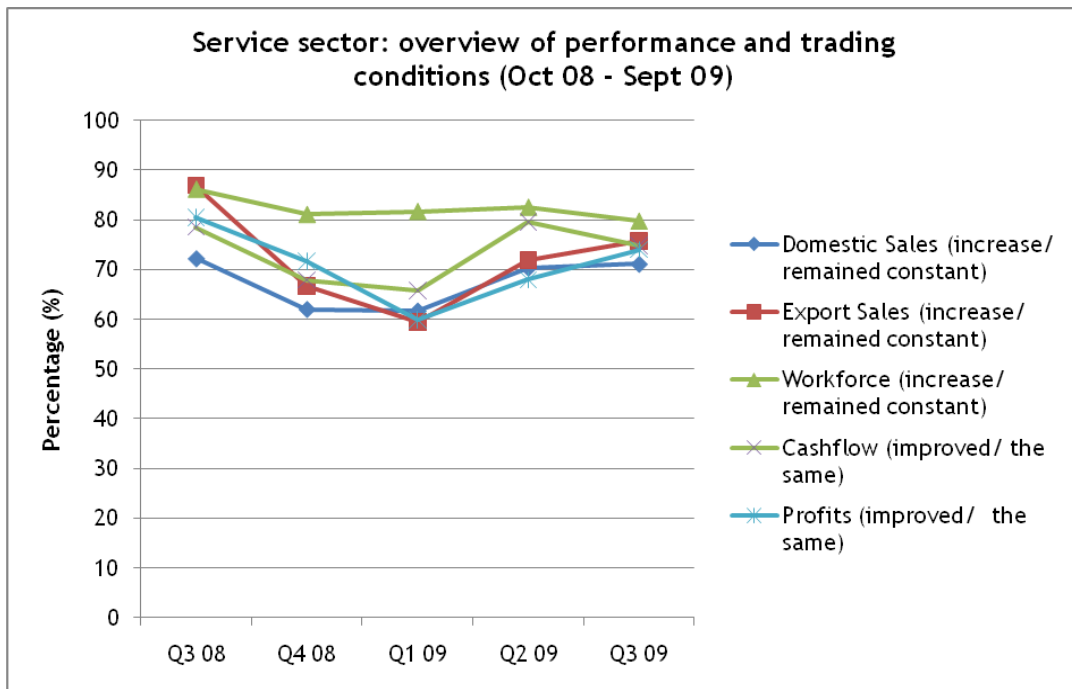
¹⁴ For the CPI definition adopted by the West Midlands Cultural Observatory see previous snapshots. Please note, for this and future analyses the umbrella category 'audio-visual equipment' will now be used to represent the 5 individual goods within this category and the category 'recreational and cultural services' will represent the 2 individual services within this category.

57. It is important to note that the CPI and RPI do not take into account the 'value for money' that customers receive. For example, even if prices remain consistent, customers may actually be receiving 'more for their money' and in real terms, prices may have decreased. This may be particularly relevant to audio-visual goods where significant technological advancements may not be reflected in price.

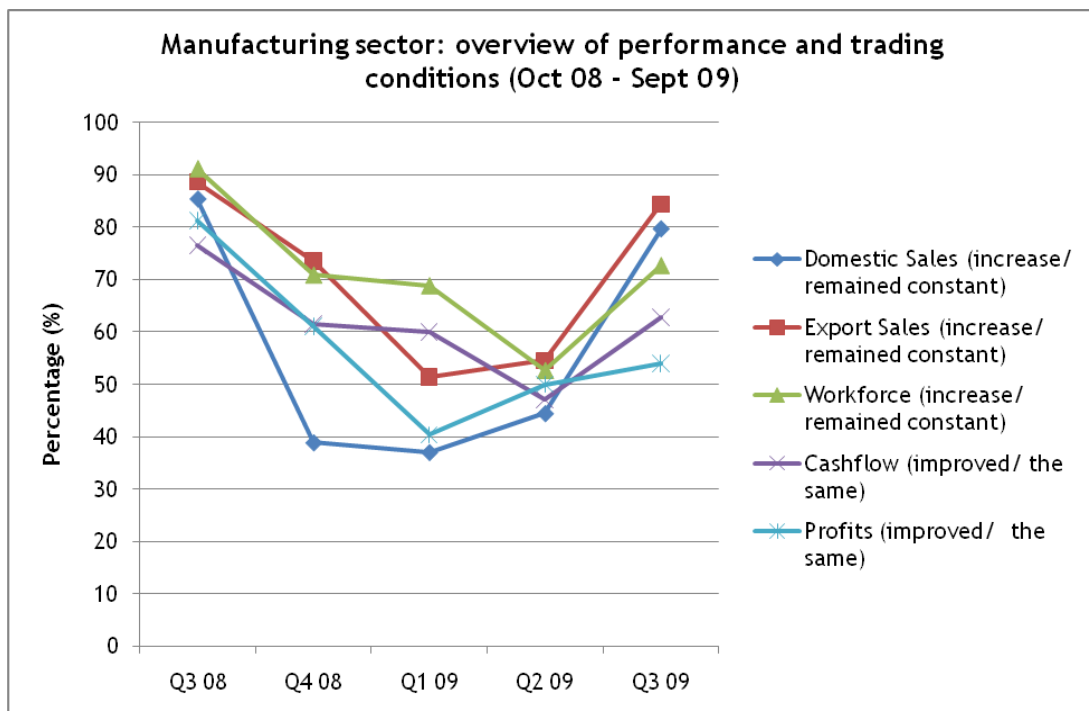
9 Overview of Wider Economic Trends

58. As shown in the line graphs below, recent results of the Birmingham Chamber of Commerce Quarterly Economic Survey (QES)¹⁵ suggest that the situation for local businesses may have improved in some respects since the previous quarter. The graphs also clearly demonstrate that it is the local manufacturing sector that has seen the most significant dip in growth: the service sector has remained stable in comparison.
59. Notable trends this quarter include:
- A marked increase in the number of manufacturing businesses reporting consistent or increased domestic sales (+35%), export sales (+30%), workforce (+20%) and cashflow (+16%) compared to the previous quarter.
 - The situation for both sectors continues to compare unfavourably in all respects to the situation 12 months ago (pre-recession). However, it can be said that the situation is now more comparable to pre-recession results particularly in terms of the number of service sector businesses reporting consistent or increased domestic sales (-1%) and cashflow (-4%) and the number of manufacturing respondents reporting consistent or increased export sales (-4%) and domestic sales (-6%).

¹⁵ The QES forms part of the biggest independent business survey in the UK. This quarter's survey is based on data from 205 respondents (55 from the Manufacturing sector and 150 from the Service sector).



Source: Birmingham Chamber of Commerce, 2008/09



Source: Birmingham Chamber of Commerce, 2008/09

10 Government initiatives to support the cultural sector through the recession

60. Since the last [snapshot](#) was published, the following cultural sector support programmes have come to light:

- Heritage Lottery Fund (HLF) investment in heritage skills -in July 2009 HLF announced an investment of an additional £7.3 million to support training which will deliver up to 1,000 paid opportunities for people seeking a future career in heritage¹⁶.
- English Heritage is set to launch a series of heritage work placement opportunities under the Government's Future Job Fund¹⁷.

¹⁶ Cited in English Heritage (2009) [Heritage Counts](#), p14

¹⁷ Cited in English Heritage (2009) [Heritage Counts](#), p14