

<b>Committee(s)</b>	<b>Dated:</b>
<b>Culture, Heritage and Libraries</b>	16 May 2022
<b>Subject:</b> Outdoor arts Programme 2021/22 – Annual Report	<b>Public</b>
<b>Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly?</b>	<b>2, 3, 4, 7 and 10</b>
<b>Does this proposal require extra revenue and/or capital spending?</b>	N
<b>If so, how much?</b>	N/A
<b>What is the source of Funding?</b>	N/A
<b>Has this Funding Source been agreed with the Chamberlain's Department?</b>	N/A
<b>Report of:</b> Damian Nussbaum, Director of Innovation and Growth	<b>For Information</b>
<b>Report author:</b> Nick Bodger, Cultural and Visitor Development Director	

### Summary

This report provides an overview of the achievements of the 2021/22 Outdoor Arts Programme.

Assessing performance against the golden thread principles agreed by your Committee when the programme was first established, headlines this year include the securing of more than three times the value of the programme's core budget through partnership; a record number of events being delivered; and record attendances year-on-year.

These achievements have been realised against a backdrop of significant challenges brought about by the pandemic which are still impacting footfall and spend in central city areas.

Despite these challenges, this year's programme has demonstrated how outdoor arts activities can drive visitor numbers and thus economic recovery, with the programme having significantly bucked the trend of the lower attendances reported on a London and national level by arts and cultural institutions.

### Recommendation(s)

Members are asked to:

- Note the contents of this report.

## Main Report

### Background

1. Following consultation with relevant Members, officers and stakeholders, a proposal for a successor model to the City of London Festival was presented to your Committee in October 2016. As part of that proposal, it was agreed that funding previously allocated to the festival would be allocated for a period of three years to enable delivery of an annual Outdoor Arts Programme. In December 2018, your Committee agreed to extend the funding term for a further five years (to 2024/25) with the opportunity to bid again this year (2022) for a further extension.
2. From the outset, it was agreed that delivery of the new Outdoor Arts Programme would align with a set of principles which form a 'golden thread' against which performance evaluation is monitored. Those principles are to:
  - a. Work in partnership
  - b. Enliven and open up City spaces
  - c. Produce excellent and innovative work and
  - d. Attract new audiences, particularly from the City worker group.
3. It was also agreed that the Guildhall Yard Public Programme (eg lunch markets) and the cultural elements of any major London or national events to which the City Corporation contributes (eg London Landmarks Half Marathon) would be supported by the team established to deliver the new programme. In addition, with funding from The Aldgate Partnership, the team took responsibility for delivering an annual programme of events in Aldgate Square in 2019. Subsequently, new funding from the EC Partnership, has enabled the team to focus efforts this year (2022/23) within the tall buildings cluster.
4. Since its inception, the Outdoor Arts Programme has taken a major theme each year, launching with *Londinium* in 2017 which celebrated the City's Roman past, followed by *Women: Work and Power* in 2018, an exploration of women's rights and achievements tied closely with the centenary of women's suffrage, and *Fantastic Feats* in 2019 which focussed on City and London architectural and engineering achievements linking to a number of significant anniversaries. In 2020, the programme was all but suspended due to the pandemic but enjoyed considerable success through online activities, engaging record audiences.
5. In 2021/22, a series of events celebrating the work of John Keats was proposed. Entitled *A Thing of Beauty*, the programme sought to celebrate the recurring motif of beauty within Keats' work, focussing on the beauty of the diverse peoples that inhabit our beautiful planet and highlighting themes of equality and inclusion, as well as the climate emergency.
6. While a core element of events around these themes was delivered, the programme was heavily complemented by major events postponed from 2020

(eg the Euro 2020 event *Inside Out* on Tower Bridge) and external spectacles such as *City Lights* and *Borealis* which were hosted in the City as part of a bid to win back audiences to Central London and support the capital's Covid recovery. This saw the usual summer programme run from June 2021 (opening with *Inside Out*) to February 2022, culminating in the *City Lights* festival.

7. With the newly approved Destination Review taking root over the coming year, a new and ambitious format (without themes) will be established going forward. This will see larger scale and higher impact events driving footfall to the City as it builds on its recovery. The subject of these events forms the content of another report to be heard at your Committee today.
8. Sadly, with the impacts of the pandemic, the suppliers of our Guildhall Lunch Markets chose to end their contract in early summer as low footfall had made these monthly events unviable financially. It is hoped they may return in future years.
9. Unlike most years in which we have been able to rely on commissioned audience surveys to help understand sentiment and other qualitative factors and which we would ordinarily have presented to you as part of this report, face-to-face interviews with on-site researchers over the summer months proved difficult – likely a result of the pandemic and less willingness by the public to engage in this way. However, sentiment surveys from the *Borealis* and *City Lights* events help paint a picture. Coupled with quantitative data which we were still able to collect, these reports have helped to deliver the findings presented to Members today.

## **Current Position**

### **Partnerships**

10. Reporting against the golden thread principles outlined in item 2 above, the 2021/22 Programme attracted 21 partners. This compares to 32 in 2019, 37 in 2018 and 22 in 2017, a decrease of 34%, 43% and 5% respectively.
11. While the decreases may seem disappointing, it is worth noting that the partnerships over this last year have been deeper, longer lasting and more expansive than ever before, establishing a solid foundation for the Destination Review work that is to follow. This is evidenced by the record-breaking level of cash sponsorship and co-commissioning funds raised in-year – a total of £1.1m, representing just over £3 for every £1 of your investment (a target of the Destination Review).
12. In comparison, £436k was raised in 2019, £9.4k in 2018 and £37k in 2017. This shows 2021/22 to have achieved funding increases of 152%, 1,039% and 2,872% respectively.
13. Such significant growth reflects the concerted efforts by the Outdoor Arts Team to proactively use programming funds to attract match support from co-

commissioners and other sponsors and serves to highlight the importance of your investment in generating such funds.

### **City spaces**

14. Against the second golden thread principle – to enliven and open up City spaces – the 2021/22 programme presented in 26 unique spaces. In the summer and autumn months, the activation of these spaces was crucial in driving recovery (and audiences), noting that footfall was low and – as such – that retail and hospitality were struggling to remain open. Furthermore, it helped support the *Square Smile* campaign, which has been working to excite a return to the office, by providing incentives for workers to be in the City and so feeding cultural appetites that had, for most, been starved of live entertainment.
15. In comparison to previous years, the total number of spaces animated in 2021/22 is unsurprisingly less than in 2019 (31 sites and a 16% drop); is one shy of the total number of sites animated in 2018 (a 4% drop); and a significant increase on the 15 sites animated in 2017 (a 73% rise).
16. This is largely due to focus and scale, with the Outdoor Arts team focussing on congregational hubs in the City to help drive recovery in core areas, and delivering larger scale events running for multiple nights, to attract the largest possible audience numbers.
17. Similarly misleading is that the number of events presented by the programme drops between years – 63 in 2021/22 against 129 in 2019 (a 51% drop); 82 in 2018 (a 23% drop); and 66 in 2017 (a 5% drop). This is because an event is counted as one whether it runs for 20 nights or one.
18. In previous years, most events have been one-offs with the calculation described having been used to avoid over counting exhibitions which can run for many days (and thus, if counted for the number of days run, would distort numbers between years depending on the number of exhibitions presented).
19. The 2021/22 programme, unlike any other before it, has had significant runs of “live performance” works at a number of key City sites. These include *Borealis* in Guildhall Yard (12 nights with nine shows a night) and *City Lights* which ran for 10 nights across five locations. If each opportunity to view were counted as one event, the number of events (excluding exhibitions as per the reasons above) would be 225, a 74% rise on 2019.

### **Excellent and innovative work**

20. The third principle outlined in item 2 (programming excellent and innovative work) is ordinarily measured by the number of new commissions undertaken and the satisfaction ratings of the audiences engaged with them.

21. In 2021/22, 16 new commissions were undertaken. This compares to 30 in 2019, seven in 2018 and five in 2017, delivering a drop of 47% on the 2019 total, and then increases of 129% and 220% respectively against 2018 and 2017.
22. This drop against 2019 is not surprising. Newly commissioned work is expensive and can take months, if not years, to develop. The majority of new commissions in 2021/22 were those commissioned for 2020 which the team was unable to deliver because of the pandemic. They include *I am from Reykjavik* (a partnership with London International Festival of Theatre (LiFT)), *Inside Out* on Tower Bridge (a partnership with GLA) and *Black Victorians* (with Greenwich and Docklands International Festival).
23. At the time the team would ordinarily have commissioned new work for 2021 (December 2020), the country was in lockdown and the route out for public events was not fully understood. To guard against financial loss, new commissions were therefore not sought, and funding invested instead in ready-made works that could be rolled out (or not) depending on the Covid climate and the appetite of audiences. This too enabled the team to focus on driving audiences to events that had already proven popular elsewhere.
24. As discussed in item 9, audiences were unwilling to undertake face-to-face surveys at events over summer and autumn due to the close contact required with researchers at a time of pandemic. This disabled the team from gathering evidence of satisfaction (or not) with the event that audiences were viewing (noting that for free outdoor events without booking there is no opportunity for data capture and thus follow up surveys).
25. The only sentiment ratings the team has been able to obtain have been from the delivery of *Borealis* in Guildhall Yard because – although free – space limitations meant that slots had to be booked (enabling follow up with bookers), and *City Lights* which took place in February when audiences were less averse to face-to-face interviews. Both events were not new commissions and so do not inform how the new work presented was received.
26. However, with the focus switched away from new work to winning back audiences to the City through populist programming (so supporting local retail and hospitality sectors), it is interesting to note that 95% of respondents at *Borealis* thought events like it made the City feel more vibrant.
27. For both *Borealis* and *City Lights*, 79% and 81% of respondents respectively said they would visit Central London more often if more events like them were put on. Notably, 51% of audiences felt more confident visiting the City during the pandemic after having attended *Borealis*, which took place at the peak of the Omicron variant.
28. These figures demonstrate the role outdoor arts activities can play in driving footfall and thus recovery. That 92% of respondents rated *Borealis* as very or fairly good, has likely strengthened the City's reputation as an area where exciting and interesting outdoor work takes place, with audiences watching out for the next "big thing" and (hopefully) returning when that happens.

29. As discussed above, the push this year was to programme populist work to drive audiences and support local sectors through economic recovery. The surveys for both the *Borealis* and *City Lights* events help evidence the success of this, with an average £46 spent in the area by each respondent attending either of the events.
30. Specifically, for respondents who provided an estimated spend on hospitality and retail, the individual averages are much higher. Those attending *Borealis* spent £47 on food and drink, £39 on shopping, £41 on tickets for other events and £219 on accommodation; and those attending *City Lights* spent £33 on hospitality and £44 in retail.
31. It should be noted that the accommodation average spend relates to a very small sample (13 respondents) and should thus be regarded with caution.

### **New audiences**

32. The principle of attracting new audiences is ordinarily measured across a series of criteria that include geo-demographic information such as ethnicity, place of residency and workplace. As previously discussed, excepting the *Borealis* and *City Lights* events, this could not be gathered by our on-site researchers. However, the ambition this year was to attract maximum audience numbers, whether old or new audiences, whomsoever from wherever, and so underpin the economic recovery of the City's retail and hospitality sectors.
33. For the sake of comparison, the below totals do not include major pan-London events such as London Landmarks Half Marathon for which City-only attendance is difficult to assess nor on-street exhibitions in areas of high footfall where a formula of 2% of passing pedestrian traffic is ordinarily used by the industry to calculate engagement (noting this can distort figures when footfall is very high). *Asphalt Art* would be included in such a category and so is not considered in the totals given.
34. For 2021/22, 103k people engaged with an event within the programme. This compares to 96k in 2019, 56k in 2018 and 61k in 2017, a rise of 7%, 84% and 69% respectively (numbers are rounded to the nearest thousand).
35. This is the largest audience the outdoor events programme has attracted and shows a phenomenal achievement at a time when footfall in the City and Central London more widely has been so low. To give this context, UK attractions in the calendar year 2021 reported visitor footfall at 57% below 2019 pre-pandemic levels (source: ALVA); while in the City, a 79% shortfall is recorded (source: City Attractions Monitor (RJS Assoc.)).
36. Notably, *Borealis* (December 2021) and *City Lights* (February 2022) account for approximately 50% of the total audience numbers reported above – both falling at a time of less restrictions (albeit Omicron deterred many) and thus of greater footfall generally. That said, even at the time of writing, Google Mobility data for the City of London in the working week covering 28 March to 1 April shows

worker footfall as back up to two thirds of normal, and retail and recreation footfall back to nearly half of normal (45%).

37. Again, the exceptional audience figures for this year, which achieve 7% more than “normal”, demonstrate the draw of outdoor arts and the power they have in fuelling a successful recovery when compared to this data.
38. This may be attributed to a pent-up appetite for culture following starvation over lockdown, it may be due to the proven populist nature and profile of the events programmed, or to the fact that less events were programmed in Central London and thus the competition for audiences was weaker. Whatever the case, that *Borealis* “sold” 30,000 tickets within the first half hour of booking opening is testament to a significant demand, with this and other events providing the City with the opportunity to show itself as a destination for events and cultural activities.
39. As reported above, geo-demographic information is limited to the two events for which qualitative data was collected. This showed that over three quarters of audiences for both events live in London, with between 5% (*Borealis*) and 13% (*City Lights*) working in London but not living here. Visitor numbers (those not living or working in London) sat between 11% and 12% for both events. Again, this is unsurprising, especially given that transport has been a major fear-factor for many over the pandemic.
40. For both events, between 68% and 70% of respondents to surveys described themselves as “White British” or “White (Other)” with between 22% and 28% describing themselves as “Asian”, “Black” or from “Mixed / mixed multiple ethnic groups”. This broadly aligns with previous years and shows no marked change.
41. The age profile across audiences was broadly the same for both events with well over a third of respondents falling into the 35-49 age bracket. Notably, family audiences were higher than is usually seen at City events with 28% coming with children to *Borealis*, and 16% to *City Lights*. This is likely due to their family appeal as well as a lower proportion of those attending after work than as would be normal.
42. All audience evaluation reports are available on request from the Executive Director of Innovation and Growth.

## Corporate & Strategic Implications

- **Strategic implications:** the City’s Outdoor Arts Programme aligns with all aims within the City Corporation’s Corporate Plan delivering the specific outcomes:
  2. People enjoy good health and wellbeing
  3. People have equal opportunities to enrich their lives and reach their full potential
  4. Communities are cohesive and have the facilities they need
  7. We are a global hub for innovation in financial and professional services, commerce and culture
  10. We inspire enterprise, excellence, creativity and collaboration

Furthermore, this year's programme has laid a good foundation for the future execution of the Destination Review, achieving set funding targets and record-breaking audiences.

- **Financial implications:** in December 2018, your Committee agreed to extend the Outdoor Arts programme's funding term for a further five years (to 2024/25) with the opportunity to bid again this year (2022) for a further extension. While this funding will be crucial to the ongoing success of the programme, a bid is not made as part of this report noting the zero-based review scheduled for next year.
- **Resource implications:** none identified.
- **Legal implications:** none identified.
- **Risk implications:** none identified.
- **Equalities implications:** none identified.
- **Climate implications:** none identified
- **Security implications:** none identified

## Conclusion

43. This year has been a record-breaking one for the outdoor arts programme with audience numbers, funding and the number of events presented significantly outstripping the achievements of previous years. This is set against a very challenging backdrop in which Government restrictions, a public fear of contagion, low footfall within Central London and storms and bad weather have had to be navigated to deliver the successes listed.

44. While it is to the credit of the team for securing and delivering the events in this context, success may also be attributed to a greater appreciation and demand by audiences for outdoor cultural activities. This paves the way for "bigger and better" events under the new Destination Review, with the year having provided the City with an opportunity to shine and to make itself better known for the delivery of safe, enjoyable, must-do events.

45. These assertions are evidenced by the results shown in this report.

## Appendices

- None

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