New Entertainment Venue (Exeter): Needs Assessment

New Entertainment Venue Advisory Group (NEVAG)

18 September 2017

Contents

Executive Summary

Report

1 Introduction 9
1.1 New Entertainment Venue Advisory Group 9
1.2 Study Brief & Process 9
2 Where is the demand / supply gap? 11
2.1 Strategic context 11
2.2 Exeter's arts and culture 'ecology' 11
2.3 Review of venues 12
2.4 Review market demand 14
2.5 Review of arts programming 16
3 What are the key venue considerations? 19
3.1 Balance between *bespoke* and *proven* models 19
3.2 Venue flexibility & acoustic 19
3.3 Get-in / get-out and turning the venue around 20
3.4 Venue revenues 21
4 Where should it be located? 23
4.1 Unanimous support for *City Centre* 23
4.2 Regeneration Opportunity 23
4.3 City Centre sites 24
4.4 Review of city centre sites 24
5 How could it be developed and sustained? 27
5.1 A 'centre for arts' 27
5.2 Funding 28
5.3 Commercial property market 30
5.4 Meanwhile use / interim measures 31

Appendices

1 List of Consultees 34
2 Strategic Context Review 35
3 Market Demand Analysis 43
3.1 Resident Market 43
3.2 Tourist Market 59

4	Market Supply Analysis	61
4.1	Arts Council England: National Portfolio 2018-22	61
4.2	Venues in the South West (c.90-minute drive-time)	61
4.3	Proposed Venue Expansions and Renovations	64
5	UK Theatres & Operators	69
5.1	UK Theatre / Arts Centres (+1,000 seats)	69
5.2	National (UK) Theatre Operators	70
5.3	Broadcasting Theatres	72
6	Venue Case Studies	75
7	Exeter Sites' Assessments	92

Executive Summary

Summarised below are the key findings from this study with references included to the more detailed analysis and evidence laid out in the *Report* and *Appendices*.

The study was commissioned by Exeter City Council on behalf of the New Entertainment Venue Advisory Group (see Section 1.1). The overarching objective of the study sought to assess the *need* for a new entertainment venue in Exeter, requiring investigation into the market demand and supply context, the key venue considerations, where it might be located and how it could be developed and sustained. The results of the study, set out in this report, highlight a range of *business model* considerations. It is Important to note that this report is not intended to be either an outline business plan or a design brief. Further feasibility work and more detailed appraisal of the options resulting from this study would be required to produce these.

Where is the demand / supply gap? (see Section 2)

- The development of a new entertainment venue in Exeter has the potential to align strongly with a number of objectives and priorities defined by its strategic context – notably, in relation to future growth, regeneration and identity. (see Section 2.1)
- Exeter appears to be 'punching above its weight' in the performing arts sector, as evidenced by the innovative grass-roots and small to medium sized arts organisations resident in the city and the level of funding committed through the Arts Council England's National Portfolio. (see Section 2.2)
- Exeter is well served at the small to medium scale of venue i.e. up to 500 seated capacity. (see Section 2.3)
- The South West of England is poorly served for high quality classical music venues. However, there is insufficient market gap (and huge risk involved) for a large concert hall, designed to attract quality international orchestras. (see Section 2.3)

- However, Exeter could satisfy a gap in the provision of a venue with a high-quality acoustic for smaller classical music formats e.g. chamber music and soloists up to say, 450-650 capacity. (see Section 2.3)
- The larger venues in Exeter all have drawbacks either related to their individual missions (i.e. it's a secondary purpose) or physical constraints (i.e. poor backstage or ageing facilities). (see Section 2.3)
- Regionally, larger touring theatre is currently well served by venues in Plymouth, Bristol and Torquay in particular. (see Section 2.3)
- In recent years, the music industry has experienced significant supply chain consolidation, resulting in a smaller number of larger organisations, who can wield greater control when it comes to the promotion and selection of venues and artists.
- Exeter's population of 129k, combined with the relatively low surrounding population density and existing venue provision in the region, is insufficient to sustain a predominantly 'single' art-form venue i.e. a venue designed only for classical music or, only for touring theatre or, only for live (amplified) music. (see Section 2.4 and Appendix 3)
- The research suggests there is an opportunity for developing a venue with a mixed-programme and capacity of around 1,200 seated, which could be reconfigured to a standing venue of say, 2,000 to 2,500 capacity. (see Section 2.5 and 3.2)

What are the key venue considerations? (see Section 3)

- The venue should be capable of having multiple staging configurations e.g. temporary proscenium and thrust stages, orchestra pit, flexible seating / standing arrangements to cater for the range of performance types, and a sizeable backstage. The design brief should avoid simply replicating a design from elsewhere but instead, ensure that it reflects the unique characteristics of the Exeter market and 'arts and culture ecology'.
- The range of performance types that could reasonably be hosted within a flexible larger venue will, to a significant extent, be dictated by the natural acoustic demands. It is the quality of natural acoustic that inevitably suffers when one attempts to drive too much flexibility. For this reason, in part, larger orchestra formats will be compromised.
- Notwithstanding the above, to build on Exeter's innovative performing arts scene – notably, the immersive and more experimental theatre – a strong influence arising from this study is the desire for a new venue to attempt to be as flexible and adaptable as possible (within reason). It should be capable of hosting future imaginative shows and performances that no doubt, will emerge at a larger scale in time. However, to justify its scale and audience capacity, it will need to cater effectively for the more traditional and prosaic performance types.

- For incoming productions and in order to be able to programme the venue quite aggressively and optimise utilisation, the ability to get equipment in, out and moved around the venue swiftly and efficiently is important. (see Section 3.3)
- As part of the outline business planning of a new venue, consideration of how it will generate income from event and non-event usage will be critical for example: sufficient food and beverage space, particularly for comedy and live music, which traditionally drive high alcohol sales; for non-event days use and hospitality spaces; merchandise sales; ticket sales and fees; and sponsors. (see Section 3.4)

Where should it be located? (see Section 4)

- There is a unanimous view across the Advisory Group (and supported by evidence of other venues around the UK – see Appendix 6) that a new venue of the scale being considered should be located in the city centre.
- If located in the city centre, a new venue could contribute significantly to the regeneration agenda, helping to reverse Exeter's '4pm exodus' and improve the night-time economy specifically. (see Section 4.2)
- From the assessment of a preliminary list of potential sites around the city centre, the Corn Exchange is considered to be the current 'preferred option'. This assumes a complete redevelopment of the site and is based largely on a combination of: ownership and therefore control – *owned by Exeter City Council*; its potential regeneration impact – *contribution to the west quarter (Fore Street, South Street) area and night time economy*; location - *central and complementary nearby offer*; and site – *limited apparent constraints*. As time passes, the appeal of other sites may strengthen or weaken and therefore, while a 'preferred option' has been identified at this stage, the option to consider other sites should remain open until further detailed feasibility work has been undertaken. (see Section 4.4)

How could it be developed and sustained? (see Section 5)

- There is a strong case for the co-location and clustering of arts-related organisations, education, research and business support alongside the main performance space and ancillary facilities – thus becoming a 'centre for arts' and not just a performance venue. (see Section 5.1)
- Furthermore, depending on location, consideration should be given to activating any available street frontages to maximise rental values, integrate the venue into its surroundings and aid the commercial proposition.
- Large auditoria, with the exception of arenas, are rarely privately financed in the UK since they offer limited (if any) financial return. Instead, they rely on a cocktail of funding with significant contributions typically derived from public, lottery and third sector sources. This would be anticipated for a new large venue developed in Exeter. (see Section 5.1)

- Based on researched gathered from other completed performance venues, a reasonable estimate for this stage of planning for a new entertainment venue (assuming a 1,200-seat capacity and built in a single phase) would be between £40m and £55m (excluding land, site clearance and preparation, preliminaries and external works). (see Section 5.2)
- An important lesson learnt from the last 20 years of investment across the UK's arts and cultural sector is the relative ease with which capital funding can often be secured, compared to the ongoing revenue requirements needed to sustain the longer-term operation and successful programming of a facility. However, no capital funding sources have yet to be confirmed.
- It is highly unlikely that Arts Council England will support a new venue development if it were being developed at odds, or in direct competition with, any other ACE-funded facility or organisation within its catchment. This is a crucial issue and further supports the concept for building on Exeter's unique arts ecology, which has at its core, a strong emphasis on the grass-roots and innovative producing arts scene and aiming to be a 'regional centre' with a strong and distinct purpose. (see Section 5.1)
- For Exeter City Council, a key requirement for a new venue would be to ensure its financial sustainability and not to become a burden on the public purse. To this end, an innovative business model would need to be established that delivers on the mission related objectives while also having sufficient scope and capacity to act commercially and with an entrepreneurial flair – characteristics that are clearly evident across Exeter's arts and cultural economy.
- For the existing venues across the city (and performing arts centres' generally), subsidy is commonplace but comes in various forms. ACE's National Portfolio grants provide critical revenue streams to support the Exeter Phoenix, Northcott Theatre and Bike Shed Theatre as do a number of city council grants. Reflecting this, the concept of endowing a new facility in Exeter through commercial property should be considered. (see Section 5.3)
- The step-change from Exeter's current performing arts offer to that demanded by a larger venue will be significant and will take time bed-in and mature. Event promoters will take a keen interest in the demonstrable ability to sell more tickets in the Exeter market, in order to given them confidence and establish Exeter on the circuit for larger events. To address the need to accelerate audience development and maintain programme continuity (with the Corn Exchange assumed to close) a meanwhile or temporary venue solution should be considered, as well as the possibility of intensifying activity at other venues. (see Section 5.4)

Report

1 Introduction

1.1 New Entertainment Venue Advisory Group

This report has been prepared by Fourth Street for the *New Entertainment Venue Advisory Group* in Exeter. The Advisory Group is made up of the following members:

- Cllr Rosie Denham (Chair of Advisory Group), Lead Councillor for Economy and Culture, Exeter City Council
- Dave Lewis, Exeter City Council (Events, Facilities and Markets Manager)
- Peter Goodwin, Theatre for Exeter (Chair)
- Patrick Cunningham, Exeter Phoenix (Director)
- Mike Carson, Exeter City Council (City Surveyor)
- Paul Jepson, Exeter Northcott Theatre (Artistic & Executive Director)
- Laurence Blyth Exeter Cathedral (Marketing Manager)
- Richard Fletcher, The Two Moors Festival (Trustee)
- Professor Stephen Hodge, Drama Department, University of Exeter
- Martin Thomas, Exeter Cultural Partnership (Culture Director)
- Craig Bulley, Exeter Business Improvement District (CEO)
- Mark Barretto, Exeter Business Improvement District (Manager)
- Nigel Paul, Exeter College (Head of Drama & Performing)

1.2 Study Brief & Process

The original objectives for the study, defined by the New Entertainment Venue Advisory Group covered:

- To review the current performance venues in Exeter and perceptions about gaps in provision.
- To evaluate current and likely future demand for a new large-scale entertainment venue (minimum 1,000 capacity) across Exeter and its cultural catchment area.
- To identify the likely constraints on a new venue, including cost, location, and competition.
- To identify opportunities presented by new and emerging technologies, the digital agenda, and innovative management and business models.
- To review trends in recent and new UK and European performance venues, including business/financial models, the mix of art forms, and the balance between producing and receiving/presenting programmes.
- To identify options that could meet Exeter's needs for a new performance venue in terms of scale, operating model, programming approach and facility mix, and make recommendations supported by an informed evidence base.

- To engage with funding partners, including Arts Council England, about the likelihood of support.

In addressing these objectives, the study process included:

- An inception meeting on 26th March 2017;
- Site visits to existing and proposed venues in Exeter and the city more generally to understand its current state and regeneration context;
- Review and analysis of data made available by each venue (some of which could be deemed commercially sensitive and therefore has either been omitted from this report or anonymised);
- One-to-one consultations with representatives of the Advisory Group and other relevant stakeholders;
- Preparation of an analysis of the market demand and market supply in relation to a new venue (updated with comments received following its initial circulation to the advisory group in May 2017);
- Discrete review of the current programmes for the existing venues across Exeter;
- Desk-based research into a range of comparator venues and latest insight into new venues;
- An interim meeting of the Advisory Group on 14th July 2017 during which Fourth Street presented the draft and emerging conclusions and a final meeting on 6th September 2017

2 Where is the demand / supply gap?

2.1 Strategic context

A review of relevant public and third sector strategy documents has been undertaken (see Appendix 2 for detail) to reveal the objectives and the priorities that may influence or be influenced by a new entertainment venue. The following themes and issues are noted:

- Exeter's population will experience significant **growth** over the coming years (estimated[1] at 12.5% over 20 years)
- This growth needs to be complemented by **higher quality jobs** to drive greater economic growth and value, making the city more competitive and attractive to both employers and employees
- To attract and create these jobs, there is a need to **improve Exeter's reputation** locally, regionally and internationally
- A strong emphasis is placed on improving the **night-time economy**, for which the arts and culture sectors will play a vital role
- Retaining and developing Exeter's **unique character and identity** is crucial, and not allowing it to be smothered by a dominating venue or one not fit-for-purpose in Exeter's context
- The importance of **nurturing and developing** home grown talent, which can positively and directly influence the city's identity
- To aspire for **excellence**
- To achieve all the above will require the continuation and expansion of **partnerships and collaboration**

2.2 Exeter's arts and culture 'ecology'

Despite its population of 127,300[2], the performing arts scene in Exeter is prospering with an eclectic mix of venues, a dynamic range of organisations, large and small, considerable creative talent, the large body of related academics and students, and a healthy degree of competition and collaboration across the sector.

Compelling evidence indicates that Exeter has a more innovative culture and greater strength and depth in the performing arts sector than other, similarly sized UK-towns.

This is illustrated in Exeter being home to nine Arts Council England (ACE) *National Portfolio Organisations*, five of which relate directly to the performing arts sector. These are currently supported by annual ACE grants totalling £677k[3] and largely focused on nurturing emerging talent and the

[1] Durham University estimates, 2016-2036
[2] Mid-2015 estimate
[3] Arts Council England 2018-2022 National Portfolio Organisations (annual funding): Northcott Theatre (£125k), Exeter Phoenix (£126k) Kaleider (£110k), The Bike Shed Theatre (£75k) and Theatre Alibi (£242k). The other

production and presenting of small to mid-size arts productions. This is exemplified by *The Bike Shed Theatre* with its innovative immersive theatre offer; the *Northcott Theatre*, which has recently returned to co-producing; *Theatre Alibi's* contemporary storytelling; *Kaleider's* 'extraordinary live experiences' and studio space; and the *Exeter Phoenix,* anchored by its live music, film and visual arts programme and its Creative Hub network.

In addition to these arts-focused organisations, Exeter University[4] and Exeter college are instrumental components of the city's arts and culture 'ecology', evidenced through their combination of leading education and research programmes, and by the constant seeding of talent – regularly achieving national acclaim[5] and responsible for creating and partnering the city's arts and cultural organisations.

More generally, the city has strong collaborative values and for the arts and cultural sector this is evidenced by individual partnerships (often hidden from public view) as well as the public facing and formal arrangements borne out through the Exeter Cultural Partnership[6], with the stated strategic aim of *'developing Exeter as a cultural vibrant city'*.

However, while collaboration is generally acknowledged to yield positive results (particularly around programming, resourcing and providing stepping stones for emerging artists – and evidenced by the positive working of the Advisory Group), there is an obvious reluctance to share commercially sensitive and valuable data, which naturally restricts collaboration in areas such as joint marketing, booking and ticketing arrangements.

Overall, there is a strong consensus amongst the Advisory Group members that, should a new venue be developed, it is vital it does not smother these unique and innovative characteristics of Exeter's arts and culture ecology – and should therefore avoid being developed simple as a large *generic* or *mainstream* venue.

2.3 Review of venues

For larger 'live' events, the university's Great Hall offers a seated and standing capacity of 1,500 and 1,800 respectively. Over the years, it has hosted some of the biggest names in pop and rock; U2, Bob Marley, Pink Floyd, Razorlight and the Kaiser Chiefs. In more recent years, the university no longer programmes or prioritises it as a 'live' venue but hires it out (via Event Exeter) with the principal objective being on revenue generation. Despite this and its limited backstage provision, the Bournemouth Symphony Orchestra performs regular monthly concerts at the venue. A key issue to explore with the University as part of the next steps – at a strategic level – is the longer-term aims and priorities for the Great Hall.

In the city centre, the large part of the Cathedral's programme is dominated by classical music, for which it has a good acoustic and the obvious appeal of its architectural grandeur. But, the venue can, by its

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four NPO's are Royal Albert Memorial Museum (£607m), Libraries Unlimited South West (£172k), Arts and Health South West (two funding streams @ £95k & £40k).

[4] Drama department has c.500 students and is ranked top 3 in the UK

[5] E.g. Punchdrunk, Radiohead, Alex Farquharson (Director of Tate Britain)

[6] www.exeterculturalpartnership.org.uk

management team's own admission, be let down by its flat floor and columns that restrict some views and the limited ancillary facilities (i.e. no rehearsal or green room, only two toilets to serve the entire audience in a neighbouring building and limited catering capacity).

For gigs and dance music events, the Lemon Grove at the university's campus can cater for up to 800 or 1,200 capacities respectively, but these are principally promoted to the student market. Other than the occasional larger event staged at the Riverside Leisure Centre (which could be intensified albeit, as a secondary use of its space), there are no other permanent venues capable of hosting larger performances across Exeter.

At a much larger scale, and beyond the city boundary, WestPoint (7,500 capacity) at the Devon County Showground caters for the occasional arena concert or show but its programme focuses on consumer and trade exhibitions.

For its population size, Exeter is well served for venues at a small to medium scale with the *Bike Shed Theatre, Exeter Phoenix, Barnfield Theatre, Corn Exchange* and *Northcott Theatre* (see Section 2.5 for information on their programming). Similarly, it is well served by Westpoint, at a much larger, arena scale. Between these however – at the 1,000+ capacity scale – it is evident that the existing stock of venues have significant drawbacks (as noted above) arising from the combination of their individual missions (i.e. neither being prioritised, programmed nor promoted as public performance venues) and their physical constraints (i.e. originally designed for other purposes or the facilities have become out-dated).

The nearest larger venues in Plymouth[7] and Bristol[8] currently serve the Exeter and regional demand for larger scale theatre and 'live' events (and the market evidence suggests that the region is relatively well served by its existing venues, albeit they are inevitable more widely dispersed given the population density). This situation should continue to be monitored. The provenance and market strength of Plymouth's Theatre Royal, as an influential *producing*[9] and *presenting* theatre (and heavily supporting as an ACE NPO[10]) is particularly important in respect of this study. It would be unrealistic to assume that a new venue in Exeter could be designed solely for, and sustained as, a venue for regional touring theatre, given this strength of nearby competition.

Similarly, one needs to be cautious about a new large venue designed principally for larger music and comedy events given the phase 2 plans for upgrading Colston Hall[11] and the Plymouth Pavilions (although there remains some uncertainty surrounding its long-term future).

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[7] Theatre Royal (1,320 capacity) and Pavilions (up to 3,500 capacity).
[8] Colston Hall (1,834 seated show, 1,932 general admission show (standing), 2,069 for a classical concert)
[9] https://www.theatreroyal.com/your-visit/theatre-royal-plymouth-venues/production-and-learning-centre-2/
[10] £3,556,500 between 2015/16 and 2017/18
[11] £45m scheme to transform Colston Hall into an 'international standard concert facility and a National Centre for Entertainment, Education and Enterprise across the arts – music, comedy, theatre, dance and the visual arts'. As at June 2017, £30m is reported to have been raised and the plans target a completion by 2018.

2.4 Review market demand

A detailed assessment of the potential demand for a new entertainment venue in Exeter is contained in Appendix 3. The highlights drawn from this are summarised below.

- Overall, the population Exeter at only 129k, coupled with the relatively low density of population within the surrounding, mainly rural areas, presents one of the most significant challenges when considering the 'need' for a new entertainment venue. It is these factors that are considered of most relevance at this stage of assessment than the specific make-up, characteristics and propensities of the individual population segments. For the avoidance of doubt, the results of this market demand analysis do not suggest that a larger venue would be incapable of attracting the necessary size of audiences to sustain itself but rather, its position and programming must be carefully constructed in order to appeal to and attract from a wider area catchment, recognising the strength of competition from other venues in the region.
- The resident population radiating out from the centre of Exeter has been assessed in four discrete drive-times up to a 90 minute extremity. The total population within this 90 minute drive time is estimated to be 2.2 million. However, it should be noted that this is skewed by two highly-populated centres lying on the fringe; Bristol (part) and Plymouth. Both these larger metropolitan centres already possess several larger entertainment venues that will serve and attract their own surrounding resident audiences (this is considered in the supply-side analysis (see Section 2.4 and Appendix 4).

Area	Drive-time	Population
Immediate	0-15min	119,802
Local	15-30min	219,738
Regional	30-60min	851,111
Greater Regional	60-90min	1,023,021
Total		**2,213,672**

- The demographic analysis reveals that the population within the 'immediate' catchment area is generally younger than both the Great Britain (GB) average, as well as the other resident markets further out from Exeter. More specifically, the number of immediate residents aged between 18 and 29 years is considerably above the GB average, which is attributed in part to the large student population in Exeter.
- In contrast, 'local', 'regional' and 'greater regional' residents all have an older age profile than the GB average. In particular, there are fewer people than the national average in the 18-44 years age bracket, but much more significantly, far greater numbers of people than the GB average age in the 60+ years age range.
- The analysis shows that all drive-time segments are *less* ethnically diverse than the UK average (and predominantly white). In addition, the 'immediate' area is generally *more* ethnically diverse compared to the local, regional and greater regional markets, which again is assumed to reflect the large student population and its 'urban' setting.

- In terms of social grade, the immediate market (i.e. 15 minute drive-time) is broadly in line with the national average in terms of affluence and the 'AB' category. However, this catchment area has a higher proportion of residents within the 'C1' category, and a below average proportion of residents within the 'C2' and 'DE' categories. The results for the other catchment areas are also mixed, with no definitive trends regarding the level of affluence. For example:
  - **15-30 minute drive-time**. The population is broadly in line with the national average for the more affluent categories – 'AB' and 'C1' – however, a lower proportion of residents are within the 'DE' category.
  - **30-60 minute drive-time**. A significantly lower proportion of residents are within the 'AB' category, while a significantly higher proportion of residents are within the 'C2' category, indicating lower levels of prosperity. However, this is tempered by the fact the proportion of residents within 'DE' are in line with the national average.
  - **60-90 minute drive-time**. While residents are broadly in line with the national average for the 'AB' and 'C1' categories, a lower proportion of residents are within the 'DE' category.
- As a result, a certain degree of caution must be exercised when making generalised statements about the socio-economic profile of the resident catchment areas.
- The propensity to engage in a cultural activity tends to *increase* as the drive-time increases further away from Exeter. This indicates that there is a high degree of potential demand in the 'regional' and 'greater regional' areas, as the number of cultural visits in these areas is significantly higher than the average. However, this picture is likely to be distorted by the presence of more highly-concentrated population centres in these areas (e.g. Plymouth, Bristol), which results in increased participation due to a more intensive programming schedule and a higher volume and range of cultural / entertainment venues.
- Based on a review of ACORN classification for the population drive-times (see Section 3.1.4 of Appendix 3), the following insight has been drawn:
  - ACORN 'Groups': The immediate area (0-15 minute drive-time) is characterised by lower levels of affluence, demonstrated by the high concentrations of *Student Life* and *Starting Out* groups and relatively low concentrations of groups within *Affluent Achievers* or *Rising Prosperity*. As drive-time increases further away from Exeter, the population appears to possess greater levels of wealth and prosperity, driven by increases in the concentration of *Mature Money* and *Countryside Communities* groups.
  - ACORN 'Types': The more affluent and culturally aware types that typify higher levels of potential demand – *Retired and empty nesters* and *Upmarket downsizers* – appear in greater concentrations further out from Exeter, particularly within a 15-30 minute drive-time. There are a higher proportion of *Educated families in terraces* in the immediate

area, which are characterised by lower levels of wealth yet also have some interest in undertaking relevant leisure activities.

- The market demand analysis also contains an assessment of Audience Spectrum data times (see Section 3.1.5 of Appendix 3). From this the following is noted:
    - The 30mins drive-time catchment contains a population which is highly engaged and interested in arts and cultural activity when compared to the 90 mins and the South West and England more generally. This is illustrated by the higher proportion of people falling into the *Commuterland Culturebuff*, *Experience Seekers* and *Dormitory Dependable* categories (which typically have a stronger propensity than most other categories for engaging in arts and culture).

2.5 Review of arts programming

2.5.1 Programming across Exeter venues

The public programmes for the mid- to larger-scale venues across Exeter have been reviewed to assess the current city-wide performing arts offer, the balance of shows between venues and the make-up of individual venues. In summary:

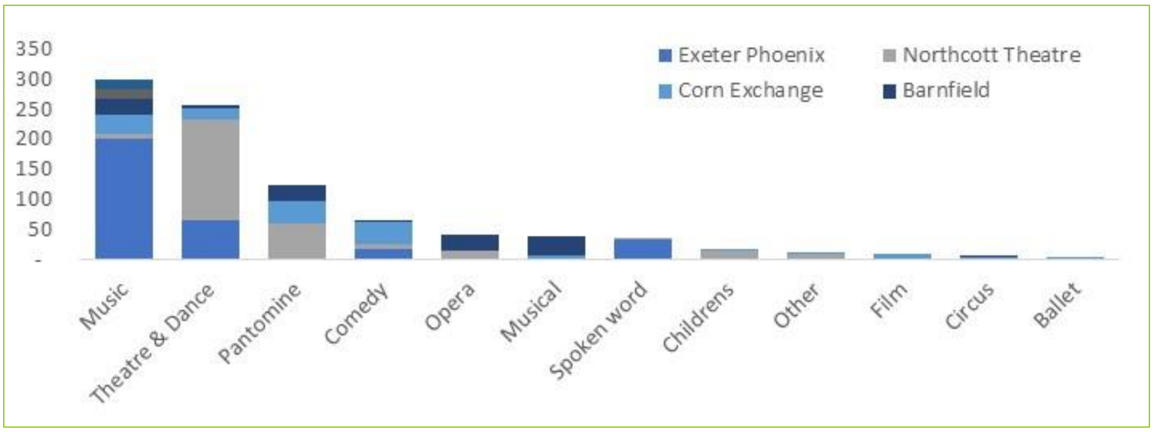
- The **Exeter Phoenix** is estimated to host around 320 public events per annum[12] (excluding Film) and its programme is dominated by Music (63%). The music events are made-up of Jazz (2%), World (3%), Folk (12%), DJ / Club (18%) and Other (65%). 92% of all public events are professional / touring shows. Promoter demand for the Exeter Phoenix is understood to be around double its capacity through October to May, while during the summer months this falls away substantially because of the outdoor festivals scene (for which the Southwest has important heritage and reputation).
- The **Exeter Northcott** is estimated to host around 280 public events per annum and its programme is dominated by Theatre (81%), of which one-quarter is made up of pantomime and the other two-thirds, a mix of co-produced and touring work. An important shift recently has seen the theatre's return to producing with 20% of all tickets sold in the last season being either for its own co-produced work or those of its associate companies.
- The **Corn Exchange** is estimated to host around 380 events a year in total. Of those around 150 are stage performances and 150 other public events (such as participation dance). The remaining events are private hires. The stage performances are dominated by Comedy (24%), Music (21%) and Pantomime (26%). Of the 21% music programme, around one-third is made up of tribute bands.

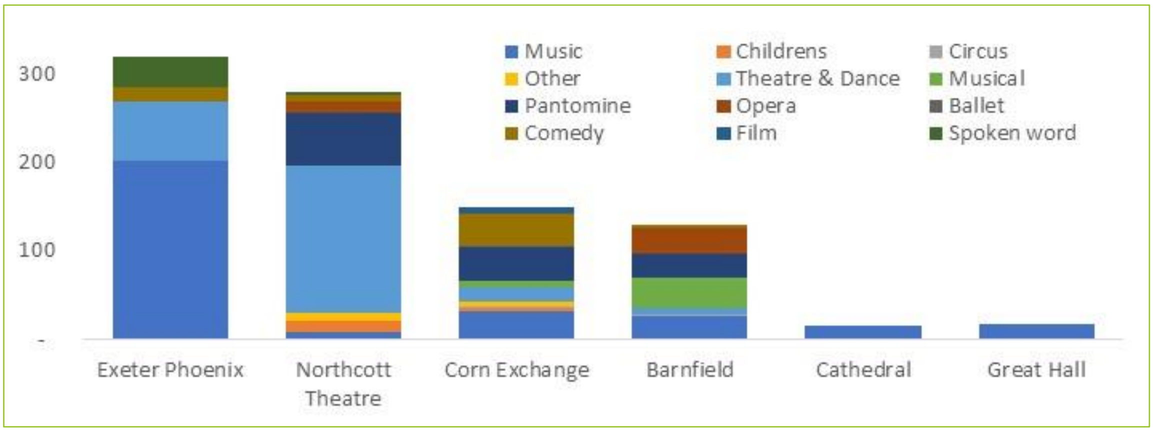
[12] Public events have been estimated based on the available programme making adjustments where appropriate for seasonal programming e.g. Pantomime.

- The **Barnfield Theatre** is estimated to host around 130 public events per annum and its programme is mixed, hosting a large proportion of amateur and touring shows, including Musicals (26%), Opera (22%), Pantomime (21%) and Music (21%).
- **Exeter Cathedral** hosts around 15 public events per annum and its programme is focused on classical music with almost half being organ recitals (47%) and a quarter being choral (27%).
- **The Great Hall** host around 17 public events per annum and its programme is dominated by classical concerts performed by the Bournemouth Symphony Orchestra (70%).

The two charts in Figure 1 below illustrate the breakdown of estimated annual public events by venue and art form, showing the dominance (by volume) of the four larger venues and *Music*, *Theatre* and *Pantomime* shows (which are driven by the combination of artistic priorities and commercial objectives).

Figure 1. Estimated annual events by *Art Form* and *Venue*





Note: Exeter Phoenix excludes Film

2.5.2 Programming assumptions for a new entertainment venue

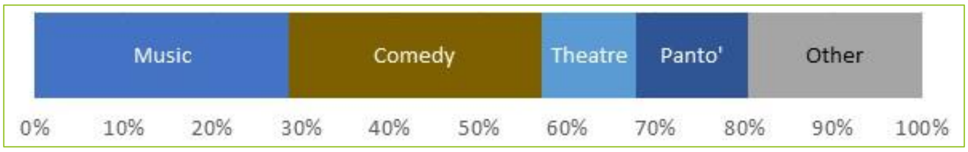
The earlier review of venues (Sections 2.3) confirmed that Exeter and its surrounding population are well served by small to mid-scale venues but less well served by larger venues within the city itself. In programming terms, this means that larger touring shows (theatre, music and comedy, in particular) tend to bypass Exeter and are presented at larger venues in the surrounding region e.g. Bristol, Plymouth and Torquay.

The assessment of the current venue programmes (Section 2.5.1) confirms the dominance, by volume, of *music* and *theatre* (including pantomime) in Exeter but crucially, the general view of those who were consulted as part of this study, suggested that there is 'additional' demand for larger touring music and theatre shows. However, to sustain a significant volume of these types of shows would require audiences being attracted from a much wider geographic area (given Exeter's low relatively low population – see Appendix 3.1). This would therefore inevitably compete with other larger venues in the region, which are already well established (in terms of their brands, audiences, production and promoter networks etc.).

A new larger venue that seeks to establish a programme dominated by a single art form will struggle to attract sufficient content to sustain itself. Instead, the evidence indicates that a new larger venue should aim to present a more balanced programme i.e. similar to that currently presented at the Corn Exchange, albeit with shows capable of attracting larger audiences. The feedback from the Advisory Group members supports this proposition. This of course assumes that the Corn Exchange ceases to operate.

At this stage, paying consideration to both the market demand and supply sides, the evidence suggests that the 'public' programme for a larger new venue should be built around the three pillars of *Music*, *Comedy* and *Theatre* (including Pantomime), combining to make up around 80% of the programme. The remainder would include a variety of 'other' content including, but not limited to: *classical concerts, children's shows, spoken word, circus, opera* and *ballet*. This indicative programme balance is illustrated in the graphic below.

Figure 2. Indicative programming mix for a new entertainment venue



Whilst indicative, the anticipated programme for any venue is of great significance; it directly informs the choice of preferred location, eventual design brief, capital expenditure plan, business plan assumptions and the positioning of the venue as part of the city and region's overall venue and event offer.

A final consideration, which must be taken into account, is the long-term future of the Northcott Theatre. Although there has been no suggestion that it might cease to operate in the future, if it did (or if the theatre was expanded), then this could have a profound impact on the programming of a new larger venue and potentially, how it is developed and managed. Hence, as part of the next steps, it is recommended that the University be consulted – at a strategic level – on its longer-term aims and priorities[13] for the Northcott and any associated development planning, and this will serve to mitigate potential programming risk.

[13] Exeter University's Arts and Culture Strategy is being drafted with a targeted completion in July 2017

3 What are the key venue considerations?

3.1 Balance between *bespoke* and *proven* models

The case studies set out in Appendix 6 illustrate the breadth of choice there is when designing and developing a new venue of the scale being considered.

There is a risk of relating a design too strongly to a precedent that doesn't address the local requirements and needs carefully enough. Just because a venue works in one location does not mean it will automatically translate to another. The advantages of having a direct comparator venue at the design, construction and fit out stages may be outweighed by the sub-optimal financial performance of a venue poorly suited to the local market.

In contrast, if developing a truly bespoke facility, the risk and scale of cost and time overruns and not meeting the original brief are also high. For example; the Aeroacoustics System originally developed for the Royal Festival Hall was installed at Plymouth's Theatre Royal and took 1 year to commission but even then, after significant time and investment, was abandoned due to its complexity and erratic performance.

For Exeter, it is clear from the market evidence and opinions of the Advisory Group that this balance between proven and bespoke models is a particularly relevant issue. The prospective venue must balance dependability to deliver proven event types, with flexibility to adapt to new genres and without being overburdened with high construction costs.

As has been noted earlier, a new venue *must* avoid smothering Exeter's exciting arts and culture ecology and becoming too dominant, yet a venue of the scale being considered *will* need to be programmed from a strong commercial perspective, which in some cases will require the programme to target a more 'mass market' appeal.

3.2 Venue flexibility & acoustic

The initial consideration of programme set out in Section 2.5 proposes a mixed range of performance types, each with a slightly different set of venue requirements.

Attempting to cater in a single venue for a full spectrum of performing arts is simply not possible, even before one considers the potential brand confusion this would inevitably create. The different demands of staging and infrastructure, backstage and ancillary facilities, audience sight-lines and raking, seating and/or standing layouts, lighting and crucially, acoustics, are too varied and would lead to escalating costs and a facility full of compromise and complexity.

There are however, some types of performance that are compatible or at least, can achieve a *reasonable* and *desired* threshold of quality for each performance type, while some inevitable trade-offs are accepted. The performance types set out below, have been informed by the case study research, consultation with industry specialists and the Advisory Group:

- Drama and dance (natural acoustic and amplified) – but with a flexible staging that can accommodate a temporary proscenium and thrust formats. Based on feedback from the Advisory Group, the inclusion of a fly tower is considered essential for some programme components – which would restrict the option of a larger arena format.
- Opera and ballet (mostly natural acoustic but with some amplification) – where the thrust stage drops to reveal an orchestra pit
- Smaller classical music formats (for a natural acoustic) e.g. chamber music and soloists – although for this, the acoustic becomes most challenging and will demand physical adjustments to the auditorium and sound baffling (e.g. moveable ceilings at the Milton Keynes Theatre and Theatre Royal Plymouth; and sound baffles around the fly tower)
- Comedy (amplified) – where a 1,200-seat capacity is considered ideal for the Exeter market
- Musicals (amplified) – which would have similar demands to amplified drama performances
- Live (amplified) music – catering for a combination of seated and standing shows, with a flat-floor configuration of up to say, 2,000 to 2,500 capacity.
- Live classical (natural acoustic) music – catering for a range of smaller formats such as chamber music ensembles and soloists, but excluding larger orchestras formats. For this, the venue will need to have provision for adjusting the natural acoustic which may include the movement of partitions and ceilings (e.g. Milton Keynes, Theatre Royal Plymouth). To achieve a richer acoustic demanded by larger orchestras requires a longer reverberation time of 2, which becomes less compatible with the natural acoustic demands of drama where a reverberation time of 1 is desirable.

Notwithstanding the above, to build on Exeter's innovative performing arts scene – notably, the immersive and more experimental theatre – a strong influence arising from this study is the desire for a new venue to attempt to be as flexible and adaptable as possible (within reason). It should be capable of hosting future imaginative shows and performances that no doubt will emerge at a larger scale in time. However, to justify its scale and audience capacity, it will need to cater effectively for the more traditional and prosaic performance types.

3.3 Get-in / get-out and turning the venue around

For incoming productions and in order to be able to programme the venue quite aggressively and optimise utilisation, the ability to get equipment in, out and moved around the venue swiftly and efficiently is important.

The less time and resource that is required, the less cost is involved and the more time is available to offer for events. A venue's efficiency of get-in/get-out will vary according to its design, the venue equipment such as staging, seating, lighting etc and from site to site. All of this must be considered and should inform the site appraisal and selection, as well as the building design, capital expenditure, space utilisation and fit-out plans.

To achieve a good get-in/get-out requires suitable access for medium to large articulated vehicles and ideally, to provide for easy off-loading, loading and turning. Ideally, secure parking for multiple vehicles should be provided on-site but where this is restricted, additional dedicated spaces near to the venue will suffice.

Within the backstage, there should be sufficient space for loading and unloading and storage, allowing for incoming and outgoing performances to get-in and out, ideally in parallel, but certainly in a timescale that allows back-to-back tenancies.

The venue itself requires service space, with the food and beverage deliveries and logistics, as well as waste management facilities being the most obvious requirements.

The venue will have several event formats, and therefore careful consideration of how each of these is achieved and, critically, how the venue is turned around from one format to another – with minimal manpower and in the shortest time – must be central to the design brief.

These factors directly impact on how desirable the venue is from a promoter's perspective, as well as the costs of reconfiguring the venue to achieve optimal utilisation.

3.4 Venue revenues

As part of the outline business planning for a new venue, consideration of how it will generate income from event and non-event usage will be critical. This is an exacting process and the following points indicate the most important considerations:

- **Food and Beverage**: From both a customer service and commercial perspective, marrying the provision for food and beverage to audience requirements is central to a venue's success. This applies to events; for example, comedy and live music traditionally drive high alcohol sales. Some venues have missed this valuable opportunity by failing to design bars that have the capacity to provide the levels of service and commercial return that this demand supports. Consideration will also need to be paid to food and beverage facilities within the venue that service non-event use, to maximise commercial returns but avoid damaging existing trading and activity within the area.
- **Hospitality spaces** can provide very high yields at venues, particularly when the programme lends itself to interest from both organisations and individuals. Ensuring that a range of spaces, with a high degree of flexibility and appropriate specification will be important. Given the large backstage area that will inevitably be required for some types of events, consideration should be given to how the delineation between backstage and public/hospitality areas can be moveable to optimise use and revenues.
- **Merchandise sales** can be a useful income stream at events, with the venue usually taking a cut of the revenue in one form or another.
- **Ticket sales, fees and related uses** can be part of the venue provision, for example a combined ticket sales and Tourist Information Centre (TIC) desk. Whilst on-line sales will increasingly

dominate, there may be opportunities for cross-promotion of events across the city, which are best focussed on a face-to-face ticketing experience located in a large central facility. Alternatively, Ticketing and TIC kiosks could be located within the venue.

- **Sponsors** may look for activation spaces and therefore, providing flexible areas within the design brief may prove invaluable in attracting and retaining such partners.
- **Additional income streams** are also important, for example, a public café, open on non-event days, which also provides catering for meetings etc. may be both financially viable and support a wider range of footfall driving activities. Hire income, from letting spaces within the facilities for a wide range of uses will diversify both income streams and potentially the audiences attending events at the venue. The mix of other activities and uses within the facility such as education, research and business could also aid the financial viability of the facility and reduce the reliance on a small number of income sources. Any new venue should facilitate and support innovative ways of attracting new audiences and sources of income.

4 Where should it be located?

4.1 Unanimous support for *City Centre*

During this study, a number of potential sites have been identified (see Section 4.4 below). The first critical question however, is whether a new entertainment venue should be located within the city centre or not.

The opinion of the advisory group, and those consulted who expressed a preference, is that a new venue, of the scale being considered, *must* be located within the city centre.

A common characteristic of the city centre that was expressed by consultees, and borne out by the range of strategies and policies designed to regenerate the city centre and stimulate positive change and growth, is the apparent '4pm exodus' that occurs daily and hinders the night-time economy. While the city centre appears bustling by daytime, the evening economy generally, is considered poor.

4.2 Regeneration Opportunity

In Exeter, the city centre has and continues to undergo significant transformation.

The Crown Estate's Princesshay development alone has had a profound impact on the city centre's retail offer, shifting its gravity eastwards on the south side of the original High Street axis. Princesshay phase 2 proposal, which was granted planning in March 2017, will continue this shift by adding further complementary retail, restaurants and cinema – on the site of the existing bus station and alongside the new council-led wet sports centre.

At the western end of the high street, the emergence and growth of Exeter's 'independent' offer around Fore Street (and home to the Bike Shed Theatre) has given this area a distinctive character and unique identity.

The business case for a new entertainment venue of the scale being considered could be significantly strengthened if its impact aids a broader set of objectives and priorities such as, supporting city centre regeneration and the evening economy more specifically. In fact, a new venue that doesn't achieve such wider impacts and instead, seeks to rely largely on a narrower arts and cultural focus, will almost certainly fail to justify its business case given the market challenges in Exeter.

This regeneration potential links directly to the unanimous view that a new venue should be located within the city centre (thus implying a link between the two) and is further borne out by evidence from other entertainment venue developments around the UK (see Appendix 6). However, while arts and cultural facilities are regularly cited for their regenerative effects, the benefits rarely materialise immediately and more typically take several years and are inextricably linked to other related changes thus being impossible to evidence a direct causal link.

4.3 City Centre sites

The city centre is undergoing transformational change resulting from major redevelopment. Princesshay, completed in 2007, is widely acknowledged for its positive impact on improving the city centre's retail offer – replacing its post-war predecessor. Princesshay Phase 2, which will add complementary retail, restaurants, cinema, an open-air amphitheatre and a new public leisure centre, was recently granted planning permission.

The Princesshay developments have and will continue to shift the gravity of the city centre north-eastwards – away from the traditional centre and the other two shopping centres (Guildhall and Harlequin).

However, worth noting is the recent investment in the Guildhall Shopping Centre, which has created the Queen Street Dining Quarter. This has built on the success of Princesshay and is adding further to the concentration of food and leisure in the city centre and significantly enhancing the overall offer.

To the southwest, the gradual redevelopment of Exeter's waterfront is adding a further pull away from the traditional city centre. Between these, remains the traditional high street with an eclectic mix of new and old, the cathedral and its historic surrounds, and the increasingly popular independent offer around the west quarter (e.g. Fore Street, South Street). The University's continuing growth, coupled with a shift in demand for modern student accommodation, are together driving a large volume of new city centre student accommodation.

4.4 Review of city centre sites

Through the research and consultation process, eleven discrete sites across the city centre have been identified as having 'potential' for siting a new entertainment centre. It is important to note that some of these sites are not owned by the city council or other organisations represented on the Advisory Group and their owners have not been consulted during this initial site assessment exercise.

Exeter City Council owns large areas of the city centre, including car parks, open spaces and commercial premises, which have been reviewed as 'city centre sites'.

Many of the sites have been included in this review largely because of their scale and strategic location while in reality, their 'potential' may actually be very limited.

Figure 3. Map of 'Potential' Sites

A. Odeon cinema
B. Barnfield Theatre
C. Former BHS department store
D. Mecca Bingo
E. Corn Exchange

Car Parks:
1. Howell Road
2. Triangle
3. Mary Arches Street
4. Magdalen Road
5. Magdalen Street
6. Cathedral & Quay

A high-level assessment of each site has been undertaken and the key points are summarised below (more detailed analysis is contained in Appendix 7, Exeter Sites' Assessments). From this, a preferred site has been identified – The Corn Exchange – and the rationale which supports this, together with the recommended status of other sites, is presented in summarised in the table below.

As time passes however, the appeal of some of these sites may strengthen or weaken as their surrounding context changes and new sites become available.

At this stage therefore, while a preferred option has been identified, the option to consider other sites should also remain open.

Figure 4. Summary of Site Assessment

Site	Status	Summary Assessment
Odeon cinema, Sidwell Street	Discount	Discount option based on a combination of location (not central), regeneration impact (considered to have less immediate impact than other sites) and ownership (private)
Barnfield Theatre, Barnfield Road	Discount	Discount option on the basis of size (too small to host a 1,000+ seated venue)
Former BHS department store, Fore Street	Discount	Given the sale of the site and its development plans, this site should no longer be considered.

Site	Status	Summary Assessment
Mecca Bingo, North Street	Discount	Discount option (as a stand-alone site) based on a combination of building listing (limiting design and programme flexibility) and ownership (private). However, the car park to its rear (Mary Arches Street) has also been identified as a potential site (noted below) and therefore, consideration has also been given to whether collectively, the two sites might offer greater potential. If the two sites could be married together, then this would warrant further assessment at a later stage.
Corn Exchange, Fore Street	**Preferred**	**Considered to be the preferred option, assuming a redevelopment of the site, based on a combination of ownership (Exeter City Council), regeneration impact (contribution to Fore Street area and night time economy), location (central and complementary nearby offer) and site (limited apparent constraints)**
Howell Road Car Park	Discount	Discount based on a combination of its location (periphery of city centre), regenerative impact (physical separation from city centre heart).
Triangle Car Park	Discount	Discount based on a combination of its location (periphery of city centre), regenerative impact (physical separation from city centre heart).
Mary Arches Street Car Park	Discount	Discount as a single isolated site but if linked to Mecca Bingo this could present a more compelling opportunity and may warrant further assessment at a later stage.
Magdalen Road Car Park	Discount	Discount based on a combination of its location (periphery of city centre), regenerative impact (physical separation from city centre heart).
Magdalen Street Park	Discount	Discount based on a combination of its location (periphery of city centre), regenerative impact (physical separation from city centre heart).
Cathedral & Quay Car Park	**Retain / shortlist**	**Consider Cathedral & Quay as a fallback or alternative option to the Corn Exchange (based on a combination of its access and regenerative impact – being located between the city centre and waterfront). However, its location is considered less preferable to the Corn Exchange (peripheral to city centre retail and leisure)**

5 How could it be developed and sustained?

5.1 A 'centre for arts'

Evidence indicates there is demand for a larger venue in Exeter and that its location should be city centre. As noted in Section 2.5, the programme for the venue should be mixed with a balance of music, comedy and theatre making up around 75%-80% of events.

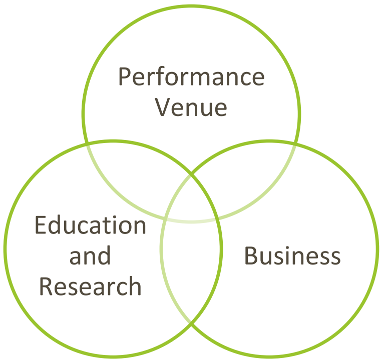
While the venue will be designed to satisfy this mixed event demand, its location within the city centre presents a significant regenerative opportunity and in particular, for the night-time economy, which currently suffers from an early evening exodus and a drinking culture, which deters a large swathe of potential visitors from spending time and money in certain areas of the city.

A new venue should also help to stimulate the day-time economy, not just through the event programming and a food and beverage offering designed to service the local area, but also, through the provision and co-location of other arts-related activities within the building. This would facilitate the necessary collaboration and growth within the local event eco system, whilst also providing a platform for a broader event output, appealing to different audiences within and around Exeter. To this end, consideration should be given to how resources that service and support the arts and events sector across the city (e.g. technical skills) can be most efficiently and effectively deployed and shared amongst stakeholders.

Historically, the university and college have succeeded in seeding new artists and arts-organisations, which have remained in the city and flown Exeter's flag nationally and internationally. However, for these fledgling businesses, the right space and infrastructure is often unaffordable and the necessary business support to nurture, develop and growth their ideas is not always co-ordinated or readily available.

There is therefore a strong case for the co-location and clustering of arts-related organisations, education and research, and business support alongside the main performance space and ancillary facilities.

Figure 5. Co-location of Arts-related Functions



Crucially, the point at which these three functions overlap stimulates additional value and economies of scale resulting from their co-location. To this end, one should explore the opportunity of broadening the scope of the venue from arts performance to being a *Centre for the Arts* albeit, without diluting the offer and probably building towards this ambition progressively rather than attempting to create it in a single phase.

Finally, through the co-location and clustering of activities, the potential for broadening and deepening engagement with the community and harder-to-reach individuals will be amplified – which ultimately, will produce a richer offer and resonate more strongly with Exeter's arts and culture ecology.

Clearly, the university and college and other partners within the city will be crucial to developing and realising such a proposition. But, through dialogue with the Advisory Group there is definite interest and appetite to explore this and develop a centre that becomes more than just a venue.

5.2 Funding

Large auditoria, with the exception of arenas, are rarely privately financed in the UK since they offer limited (if any) financial return. Instead, they rely on a cocktail of funding with large contributions typically derived from public, lottery and third sector sources (see Appendix 6 for case studies).

The National Lottery has been a mainstay of capital grants for arts centres and performance venues since it was formed in 1996 – being routed through the *Millennium Commission*, *Arts Council*, *Heritage Lottery Fund* and the *Big Lottery*.

Local Authorities are also regular supporters typically linking their contributions to the wider regeneration aims and accessibility to a broader cultural offer for the local population, rather than the artistic merits *per se* but also, crucially, providing the leverage for external grant funding. This contribution often takes the form of an allocation and/or donation of significant land and property assets. It is also important to note that Exeter City Council currently supports a number of entertainment venues across the city, amounting to an annual contribution of around £280k.

For Exeter, and noting the opportunity to cluster education, research and business facilities around a new venue, then the university and college should be potential key partners. It is important to note that no dialogue directly addressing this has been undertaken during the course of this study and therefore, no commitments have been made nor should be assumed. As part of the next steps, this would be a natural area for discussion and exploration with senior representatives of the respective organisations as the concept evolves and the viability assessment progresses.

Fundraising from private donations, trusts and foundations is also very common for new venues and one would expect this to be the case here too – particularly if the remit of the venue is broadened to embrace education, research and business activities.

Although debt finance is unlikely, Local Authorities are increasingly using prudential borrowing for a wider set of applications. There may be justification, for certain aspects of the scheme, where robust long-term income streams can be identified and ring-fenced, that meet prudential borrowing requirements.

Finally, sponsorship and naming rights may provide a key funding resolution either as part of the capital project or in terms of the venue's operational programming.

A concept study[14] for a replacement venue on the Corn Exchange prepared in 2015 – offering a seated theatre capacity of around 900 – had an estimated capital budget of £28m. The cost for a new, larger venue of the nature will almost certainly cost more than this and could be substantially higher.

Based on research gathered from other completed performance venues[15], a reasonable estimate for this stage of planning for a new entertainment venue (assuming a 1,200-seat capacity and built in a single phase) would be between £40m and £55m (excluding land, site clearance and preparation, preliminaries and external works).

For a new venue in Exeter, like most other examples, it is assumed it will require a mixed funding strategy. To this end, it is important to note the following:

- Arts Council England are currently reviewing their future capital programme (with the last programme having come to an end). This happens routinely and although there is no confirmed future commitment, it is widely expected that a new capital programme will be established. However, it is highly unlikely that ACE would support a new venue development if it were being developed at odds, or in direct competition with, any other ACE-funded facility or organisation within its catchment. This is a crucial issue and further supports the concept for building on Exeter's unique arts ecology, which has at its core, a strong emphasis on the grass-roots and innovative producing arts scene and aiming to be a 'regional centre' with a strong and distinct purpose.
- If a new entertainment venue were to be developed on the site of the existing Corn Exchange then Exeter City Council, as the owner, could offer this as a contribution towards its delivery.
- One needs to be realistic about the scale and timing for a significant public-sector funding commitment towards a new venue and Exeter City Council has affirmed from the outset that a new facility would need to be financially sustainable and not become a burden on the public purse. That said, its business case will be significantly strengthened by linking to the city's regeneration agenda and aiding inwards investment through the positive signals it can communicate to the wider market about Exeter's cultural offer and place-brand.

An important lesson learnt from the last 20 years of investment across the UK's arts and cultural sector is the relative ease with which capital funding can often be secured, compared to the ongoing revenue requirements needed to sustain the longer-term operation and successful programming of a facility. In this regard, discussions around capital funding should never be divorced from the revenue side of the business (which will inevitably require some form of subsidy to be sustained, particularly in the early years as the venue strives to establish itself in the event market). Furthermore, it is accepted that an innovative business model would need to be established that delivers on the mission related objectives while also

[14] Theatre for Exeter Development Group
[15] Spon's Architects' and Builders' Price Book, AECOM

having sufficient scope and capacity to act commercially and with an entrepreneurial flair – characteristics that are clearly evident across Exeter's arts and cultural economy.

For the existing venues across the city, subsidy is commonplace but comes in various forms (which is not uncommon across the sector and recent research[16] has demonstrated the complex range of interdependencies between public and private finance in British theatres). The Arts Council England National Portfolio grants provide critical revenue streams to support the Exeter Phoenix, Northcott Theatre and Bike Shed Theatre, as do a number of city council grants. Reflecting this, and the experience of Kings Place in London (which has received no public subsidy), the concept of endowing a new facility through commercial property should be considered and is explored in Section 5.3 below.

5.3 Commercial property market

For many cultural venues, the challenge of constantly raising sufficient revenue funding to support the ongoing development of the artistic programme and cover operational costs is a far greater challenge than securing the capital investment required to build the facility in the first place. Those that can, from the outset, secure longer-term revenue streams, are unquestionably more financially secure and benefit from avoiding the challenging hand-to-mouth existence.

Ideally, such organisations are endowed either through an investment fund or commercial property. Kings Place (see Appendix 6 for case study) in London, which received no public funding, is underpinned operationally by the revenues generated by the seven floors of commercial office development built over the basement auditoria and galleries, together with a gifted 99yr lease at a peppercorn rent.

In Exeter, there is a very limited supply of Grade A business space in the city centre and no new space coming forward, with recent developments focusing on the outskirts at the business and science parks, with close links to the motorway and airport. This lack of supply in the city centre is in part, a reflection of the limited demand[17]. However, as the Met Office's relocation has proven, and with the substantial population growth projected, future demand will change. Indeed, Exeter's prime office rents have reportedly reached record levels at £19.50/sq.ft. Furthermore, improvements to the night-time and cultural offer that a new venue will stimulate, will no doubt positively shift perceptions of the city centre and in doing so, help to encourage new occupiers to locate there.

With working patterns changing nationally (e.g. greater flexibility and mobility), the nature of the office space is also shifting. In a relatively short period of time, the UK market has evolved from there being only a few large serviced office providers (e.g. Regis, MWB) to a multitude of flexible workspace options – and this pattern is not only affecting small businesses but also medium and larger scale organisations. For

[16] http://www.artscouncil.org.uk/publication/interdependence-public-and-private-finance-british-theatre

[17] Lambert Smith Hampton Regional Property Report 2016/17 stated: Supply has fallen to 225,000 sq ft, representing an availability rate of 6.9%, the lowest since
2010, with the majority of good quality space located out of town; There is no grade A space available in the city centre; the main opportunities for new development are at St Modwen's Skypark and Exeter Science Park; Exeter prime rents reached a new record level of £19.50 per sq ft, with out of town rents growing by 11.4% in 2015 on the back of strong demand for space in the business park market.

a city the size of Exeter, where SME's will be critical to the future economy, there may be an opportunity to develop and integrate a unique workspace environment, which brings together arts organisations by linking together the academic, research and business functions. There are examples of this already present in Exeter in various forms and one would not want to upset or compromise these but rather build on their success and ideally nurture their further development and impact.

A property endowment need not be constrained to office assets but could be supported by a range of other commercial property types, depending on the demand in Exeter.

5.4 Meanwhile use / interim measures

The existing venues and cultural offer across the city will provide a vital foundation from which to build upon both in terms of programming as well as audience development. However, the step-change from Exeter's current offer to that demanded by a larger venue will be significant and will take time bed-in and mature – typically years, rather than months. Importantly, event promoters will take a keen interest in the demonstrable ability to sell more tickets in the Exeter market, in order to given them confidence and establish Exeter on the circuit for larger events.

This challenge will be particularly acute if a new venue were to be developed on the site of the existing Corn Exchange, as it would mean a period of at least 12-24 months between the closure of the old venue and the opening of the new one.

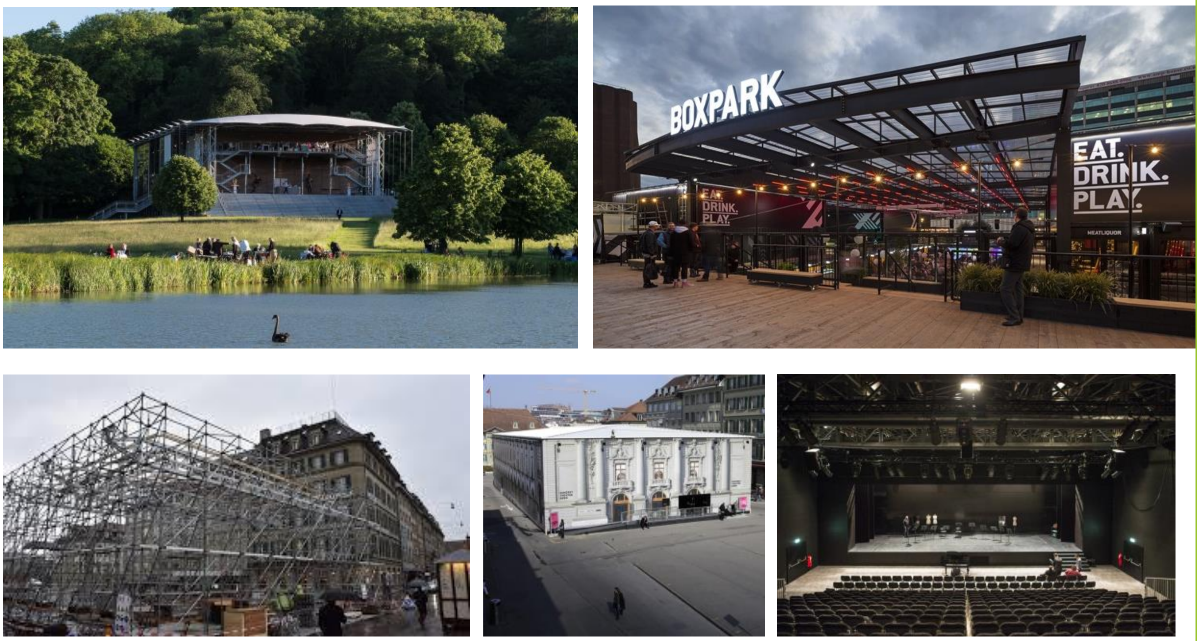
To address both of these issues (i.e. accelerating audience development and maintaining programme continuity while a venue is inactive) a meanwhile or temporary venue might be considered as well as the possibility of intensifying activity of other venues.

This could take one of several forms. Either, through a series of events and festivals specifically designed to build the programming capacity and audience interest in advance of the new venue launching or, through the construction of a bespoke temporary venue within the city, which could host a combination of new and displaced content (i.e. from the Corn Exchange). Finding a suitable site may be the biggest challenge but could include 'found spaces', brownfield sites, parks and open spaces across the city.

There are many examples that illustrate the huge advances recently in the design and technical innovation of temporary structures. Three examples, which illustrate the variety of offer include: the 600 capacity temporary opera house set in grounds of Garsington estate in Buckinghamshire; Boxpark in Croydon, with a standing capacity of 2,000, located on a brownfield development site adjacent to the mainline station; and Nussli's temporary concert theatre[18] set up in 2016 in Bern, Switzerland.

[18] https://www.youtube.com/watch?v=-UoVZ7w6t60

Figure 6. Garsington Opera Pavilion (left), Boxpark (right) and Temporary Concert Hall Bern (bottom)



Appendices

1 List of Consultees

New Entertainment Venue Advisory Group members:

- Cllr Rosie Denham (Chair of Advisory Group), Lead Councillor for Economy and Culture, Exeter City Council
- Dave Lewis, Exeter Corn Exchange (Events, Facilities & Markets Manager)
- Peter Goodwin, Theatre for Exeter (Chair)
- Patrick Cunningham, Exeter Phoenix (Director)
- Mike Carson, Exeter City Council (City Surveyor)
- Paul Jepson, Exeter Northcott Theatre (Artistic & Executive Director)
- Laurence Blyth Exeter Cathedral (Marketing Manager)
- Richard Fletcher, The Two Moors Festival (Trustee)
- Professor Stephen Hodge, Drama Department, University of Exeter
- Martin Thomas, Exeter Cultural Partnership (Culture Director)
- Craig Bulley, Exeter Business Improvement District (CEO)
- Mark Barretto, Exeter Business Improvement District (Manager)
- Nigel Paul, Exeter College (Head of Drama & Performing)

Other consultees:

- Adrian Vinken, Theatre Royal Plymouth (Chief Executive)
- Ceri Johnson, Arts Council England (Exeter)
- Stephen Hetherington, HQ Theatres Trust (Chairman)
- Nikki Sved, Theatre Alibi (Artistic Director)
- Seth Honnor (Artistic Director) and Peter Vanderford (General Manager), Kaleider
- Rachel Wieck, Exeter Music Group (EMG) Symphony Orchestra
- Sam Partridge, Exeter City Council (Senior Estates Surveyor)
- Steve Sitch (Chairman) and Tom Kearnes (Manager), Barnfield Theatre
- David Lockwood, Bike Shed Theatre (Director/CEO)

2 Strategic Context Review

Arts Council England Strategy 2010-2020		
Description	*Objectives*	*Relevant Priorities*
A ten-year strategy for the arts and culture sector to thrive and be excellent, striving to engage the public and creating the right conditions for this to be achieved whilst focusing investment where it has the greatest impact	Create the conditions in which great art and culture can be presented and produced, thriving excellence in celebrated in arts, museums and libraries	Encourage collaborative working to unlock the full social and economic potential of arts and culture across England, whilst reflecting the diversity of contemporary England and attracting international acclaim, positioning England as a centre of creative excellence, attracting visitors, promoting national interests, and contributing to the nation's prosperity and sense of identity
	Everyone has the opportunity to experience and to be inspired by the arts, museums and libraries	Continued support for an enhanced range of quality arts which has reached more people through touring and digital distribution. Invest in artists and organisations that ensure their high-quality work, collections, exhibitions and programmes reach as large and diverse an audience as possible
	The arts, museums and libraries are resilient and sustainable environmentally	Encourage cultural organisations to strengthen the role they play in their local community
	The leadership and workforce in the arts museums, and libraries are diverse and appropriately skilled	Make entry routes into employment, and opportunities for people to further their careers, fairer and more accessible to all. Provide young people with opportunities to gain employment and progress in arts and culture. Investing in arts organisations that are committed to the development of artistic talent
	Every child and young person has the opportunity to experience the richness of the arts, museums and libraries, to gain from it either as audiences or as people with a talent to pursue	To support and nourish that talent and ensure that the public understands and values the contribution made to our society by artists of all disciplines. Invest in arts organisations, museums and libraries that focus on creating high-quality arts and cultural learning experiences for, by and with children and young people

Exeter and Heart of Devon Shared Economic Strategy 2017-20		
Description	*Objectives*	*Relevant Priorities*
A joint agenda across four councils making up the EHOD sub-region. providing a framework to work together to effectively and efficiently improve and develop collective growth ambitions, priorities, and future approach to support economic growth and development in the EHOD area.	Increasing high-quality jobs, attracting and retaining investment, unlocking and enabling development as well as improving productivity skills, qualifications and employability	Exeter recognised as the core city and key regional driver for the EHOD economy
	Lack of physically available and deliverable employment land to accommodate different levels of growth requirement	Exeter described as an area with high quality of life, rich cultural heritage, natural landscape and a variety of urban centres and thriving market towns and small communities
	Focus on inward investment and attracting new, quality jobs, as well as supporting and working with existing businesses to help them grow	Using tourism to promote inward investment and workforce relocation. Ensuring young and skilled labour stay in the region as the 65+ age group is growing as a proportion of the overall population
	The Chancellor has committed to delivering at least £7.2bn of investment in transport in the south west and a step change in digital connectivity (January 2015)	A303, A30 and A358 improvement planned. 90% of premises with access to superfast broadband by Dec 2016, phase 2 of NGA broadband in progress

Greater Exeter Strategic Plan 2017-20		
Description	*Objectives*	*Relevant Priorities*
The Greater Exeter Strategic Plan will set out strategic policies and proposals for building and land use in the Exeter area up to 2040, in partnership with Devon County	Have a joined-up vision and aspirations for the area	One of the key assets of the area, highly valued by residents is the quality of the natural environment and historic and cultural heritage
	Meet the areas housing needs in the right locations	
	Secure economic growth and increased prosperity	Greater Exeter has a good level of employment, however wages are low compared to national averages. To improve the choice of jobs and the wages people receive, there is a need to maximise on current assets and ensure workforce is appropriately skilled and productive • More and better paid jobs • New investment • Building on specialist expertise • Growing existing industries
	Provide transport and infrastructure improvements needed to support sustainable growth	
	Conserve and enhance the area's environment	

Exeter Business Improvement District 2015-20		
Description	*Objectives*	*Relevant Priorities*
Sets out how Exeter will continue to prosper until 2020. The activities outlined in the strategy are intended to enhance the City Centre with a more effective approach to management of Retail, Tourism and Cultural activities and events in Exeter	Improving trading conditions for businesses	Encompasses a website with up to date information, networking meetings for sharing good practice.
	Improving the competitiveness of the Local Area	Ensuring Exeter is seen as more than simply a traditional shopping location
	Unlocking essential funding to enhance the marketing, competitiveness, safety, accessibility, maintenance and cleanliness of the City Centre	Working together with Exeter Cultural Partnership and Visit Exeter
	Reducing the operating costs of business in that area	Offering staff discount on bus fares and car parking discount

Exeter Cultural Partnership- Collaboration, Culture and Creativity 2017		
Description	*Objectives*	*Relevant Priorities*
Identifies the importance of cultural sector in Exeter, builds on collaborative aspect of Exeter Cultural Action plan 2013-15	Developing the visitor economy with National promotion of Exeter's cultural heritage	Exeter's position as the economic engine for Devon will be strengthened by growing the quality of cultural opportunities. Exeter as a creative cluster will continue to grow; it will thrive with added investment, nurturing local talent and attracting external talent
	Nurturing and developing talent	
	Ensuring relevance for people of Exeter and ensuring everyday participation in culture is available to all	
	Better sharing of resources and intelligence to make more of what makes the city attractive as a place in which to live, work and learn	

A City Centre Strategy for Exeter 2013-22		
Description	*Objectives*	*Relevant Priorities*
A ten-year strategy for the continued success of the City Centre	A sustainable, resilient and competitive City Centre	Encourage more visitors and maximise their ‘dwell time’, and ensure that the experience that all City Centre users get is varied and first-class
	A vibrant centre which offers attractions for all	Ensuring that the City Centre has an exciting and diverse cultural brand, becoming a City Centre that has a reputation for exciting and unique events throughout the year and during day and night
	A welcoming and safe evening and night-time environment offering attractions for all	Increase the number of city Centre cafes and restaurants and outside seating, connect the day-time and evening economy to hold more people in the City Centre post 6pm
	A better first impression	Excellent quality, sustainability and accessibility of the built environment
	A clean, well maintained and safe environment	The importance of street maintenance and cleanliness with a focus on partnership working to drive down crime rates

Exeter Core Strategy 2012-26		
Description	*Objectives*	*Relevant Priorities*
Sets the vision, objectives and strategy for spatial development of the city up to 2026	Mitigate and adapt to climate change	
	Provide decent homes for all	Requirement of 12,000 new houses by 2026
	Develop the potential for economic and commercial development	Providing easy access to jobs and community facilities within the urban extensions to the east and south-west. Maintaining a vital and viable mix of uses in the City Centre and delivering development to enhance Exeter's position as a premier retail and cultural destination, enhancing Exeter's regional and sub-regional status and sphere of influence. Demand for more retail development to meet the needs of a growing population and maintain Exeter's competitive position
	Achieve a step change in use of sustainable transport	
	Provide and enhance retail, cultural and tourist facilities	
	Provision of facilities to meet diverse community needs	The need for upgrading of cultural facilities to keep pace with scale and nature of demand. Impact of a growing population on the city's heritage, emphasising the importance of Exeter's heritage and the key role it plays in the economy and prosperity of the city.
	Promote development that contributes to a healthy population	
	Protect and enhance the city's character	
	Achieve excellence in design	Continue to enhance the Quay and Canal area as a centre for tourism and recreation.
	Provide infrastructure to deliver high quality development	

Exeter Visitor Strategy 2012-16		
Description	*Objectives*	*Relevant Priorities*
Strategy to further develop the visitor economy in order to create and safe guard employment, with an intent to increase employment and visitor expenditure by minimum 5% by 2016	Encourage and support market led investment in the visitor economy in Exeter; encompassing retail, food & drink, the arts, visitor attractions, accommodation and transport	The night-time economy in Exeter is important in drawing people to visit and stay in the city overnight. Economy encompasses restaurants, theatres, cinemas, bars, clubs and other cultural venues; all of which play a role in the Exeter night time economy, heavily supported by the University population
	Develop the visitor experience within Exeter to make the most of existing assets, individually and jointly and so that the sector provides year-round jobs and contributes to a vibrant economy	Produce and implement sector development plans, specific to tourism and food & drink, to support the development and creation of businesses and jobs. Ensure that there is strong support for the tourism and food & drink sector within the Heart of the South West Local Enterprise Partnership for the EHOD area
	Raise skill levels of the existing visitor workforce and prepare those with the potential for entering employment in the sector	
	Develop more effective and targeted visitor marketing of Exeter locally, regionally, nationally and internationally	Promote Exeter through the use of social networking, viral marketing, smartphone apps and new technologies, whilst providing timely accurate and efficient information on Exeter for visitors, online and through other media sources. Develop and implement a plan for the coordinated promotion of cultural and visitor attractions and venues (including the Museum) to attract more visitors and exploit their income earning potential
	Build on work already undertaken to further develop the Heart of Devon Tourism Partnership, to secure additional funding, implement additional marketing of the area and broaden its business development activities	Work with the organisers of large scale events in the Heart of Devon (such as the Food & Drink, County Show, Folk and other Festivals) in the promotion of the event locally, regionally and nationally

<table>
<tr><th colspan="3">Place Marketing Strategy Exeter Economy 2012-16</th></tr>
<tr><td>Description</td><td>Objectives</td><td>Relevant Priorities</td></tr>
<tr><td rowspan="4">To establish and reinforce Exeter’s reputation as the regional capital and principal economy south west of Bristol for attracting investment, successful businesses and skilled workers</td><td>Secure commercial and public sector investment to reinforce Exeter’s position as one of the main “power houses” of the South West economy</td><td rowspan="2">There is currently no readily identifiable iconic or internationally known buildings, products or services. There is a need for the promotion of visible and hidden brands in Exeter</td></tr>
<tr><td>Reinforce the area’s reputation for having a leading combination of retail, heritage and cultural experiences in an outstanding environment</td></tr>
<tr><td>Attract new employers and particularly more knowledge-based businesses and entrepreneurs into the city’s economy</td><td>Sectors which contribute to Exeter's regional capital reputation and grow Exeter's economy are; Professional, Scientific and Technology sectors, retail sector and the public sector</td></tr>
<tr><td>Attract and retain skilled workers and graduates</td><td>Attraction of additional skilled workers and increase of retention of graduates</td></tr>
</table>

Exeter Cultural Action Plan 2013-15		
Description	*Objectives*	*Relevant Priorities*
A live working document which outlines the strategic actions and activities intended to improve the cultural sector in Exeter	To develop a vibrant cultural economy - Exeter as a cultural destination	Development of internal networking events to enable different parts of the cultural sector to join up more effectively
	To develop cultural opportunities and experiences	Develop and support more opportunities for cultural programmes connected to the well-being agenda such as ageing, dementia, homelessness and social exclusion
	To enable wide and diverse engagement with the cultural sector	To develop a better and more qualified pool of volunteers interested in cultural events. This will help support larger scale events generated by small organisations with limited infrastructures. It will also provide a central place to access volunteers.
	To build a stronger, more confident cultural sector	Develop a structured programme for progression routes for young people and cultural workers within the city that includes internships, mentoring, apprenticeships, master classes and discussion forums. Key partners include University of Exeter (UoE) and Exeter College

3 Market Demand Analysis

This section includes a review of the market demand, covering:

- The **resident population** within 90 minute drive time[19] of Exeter City Centre. For this, we have reviewed the volume, demographics and relevant cultural and leisure propensities.
- The **domestic tourist market** (i.e. overnight visitors) – although this is relatively brief given the limited impact this should have on a new entertainment venue.

3.1 Resident Market

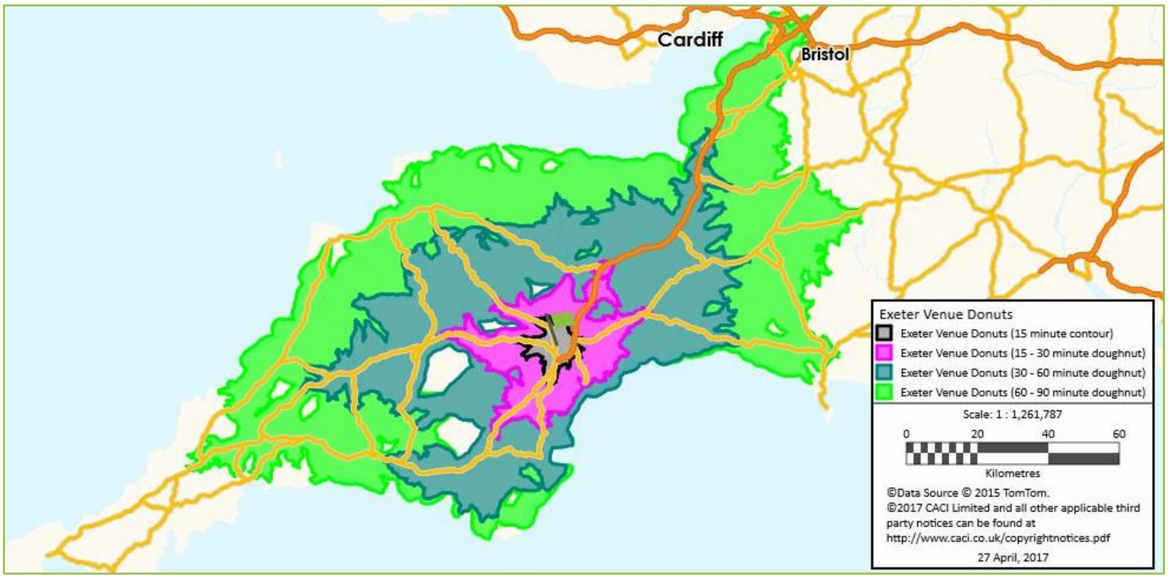
For the purpose of our study, we have disaggregated the resident market into four separate catchment areas, which have been categorised according to varying 'drive-times' from Exeter city centre (note: the drive time metric is used to define a specific area. It does not signify the primary mode of transport used by residents or exclude other modes of transport, i.e. public transport):

1. **'Immediate' area** (i.e. Exeter and its immediate surrounding hinterland) – within a 15-minute drive-time from the proposed location of the new Entertainment Venue
2. **'Local' area** (reaching Teignmouth, Newton Abbot, Moretonhampstead, Coppleston, Tiverton, Honiton, Exmouth) – within a 15-30-minute drive-time
3. **'Regional' area** (reaching Torbay, Salcombe, Plymouth, Launceston, Greater Torrington, Winsford, Burnham-on-Sea, Bridport) – within a 30-60-minute drive-time
4. **'Greater Regional' area** (reaching St Austell, White Cross, Wadebridge, Bristol, Wincanton, Weymouth) – within a 60-90-minute drive-time

The overall resident market, as defined by all residents within the 'Greater Regional' market (i.e. 90-minute drive-time), is illustrated in Figure 7 below.

[19] Drive time has been used as a means of defining a catchment of residents for a given a set of parameters. This is not intended to promote car-born travel nor exclude other forms of transport. It is worth noting that a direct train journey from Exeter to Bristol or Exeter to Plymouth is approximately 60minutes (excluding travel time getting to/from the stations at either end).

Figure 7: Resident Catchment Area within a 90-minute Drive-time from Exeter Entertainment Venue



Using the estimated resident population figures for all four catchment areas, the resident market totals approximately 2.2 million people (see Figure 8). However, this is skewed by two highly-populated centres lying on the fringe of the 'Greater Regional' area; Bristol (part) and Plymouth. While this demand analysis examines the propensity of the population to consume relevant cultural, leisure and entertainment activities, these larger metropolitan centres already possess several larger entertainment venues that will serve and attract their own surrounding resident audiences. In the supply-side analysis (see Section 4) the existing and future stock of entertainment venues in these areas is considered and will help to inform whether there is an under- or over-supply of venues in relation to demand.

Figure 8: Resident Population

Area	Drive-time	Population
Immediate	0-15min	119,802
Local	15-30min	219,738
Regional	30-60min	851,111
Greater Regional	60-90min	1,023,021
Total		**2,213,672**

The remainder of this section summarises the demographic, cultural and socio-economic profile for each resident catchment area, with a focus on the following key metrics:

- **Age profile**. The age profile of the resident market is particularly significant in the context of demand for an entertainment venue and types of programming. Firstly, different age brackets are attracted to different types of events (e.g. music concerts vs exhibitions). Secondly, specific types of age brackets, particularly those not working full-time, tend to spend more time on leisure, cultural and entertainment activities.

- **Social grading**. The social grading of residents identifies the relative level of affluence and wealth, which again has implications for the demand to consume cultural, leisure and entertainment activities. Generally speaking, more affluent residents will have higher levels of disposable income and will be more willing to invest and spend in relevant activities. In contrast, less affluent residents will have greater price sensitivity and this will influence the type of events and frequency of attendance.
- **Cultural visits**. The propensity of residents to engage in a 'cultural visit' is another useful guide for the general interest levels for a variety of cultural activities (e.g. museums, art galleries / exhibitions, theatre, cinema). As such, it will help to identify potential consumer demand for an entertainment venue.

All statistical information outlined below (in Sections 3.1.1, 3.1.2, 3.1.3) is based on the 2011 census.

3.1.1 Demographic Analysis (i.e. age profile – ONS)

The demographic analysis reveals that the population within the 'immediate' catchment area is generally younger than both the Great Britain (GB) average, as well as the other resident markets further out from Exeter. This is evident in Figure 9, which compares the age profile of the resident population segments against the average (index = 100)[20]. According to the graph, the number of immediate residents aged between 18 and 29 years is considerably above the GB average, which is attributed in part to the large student population in Exeter.

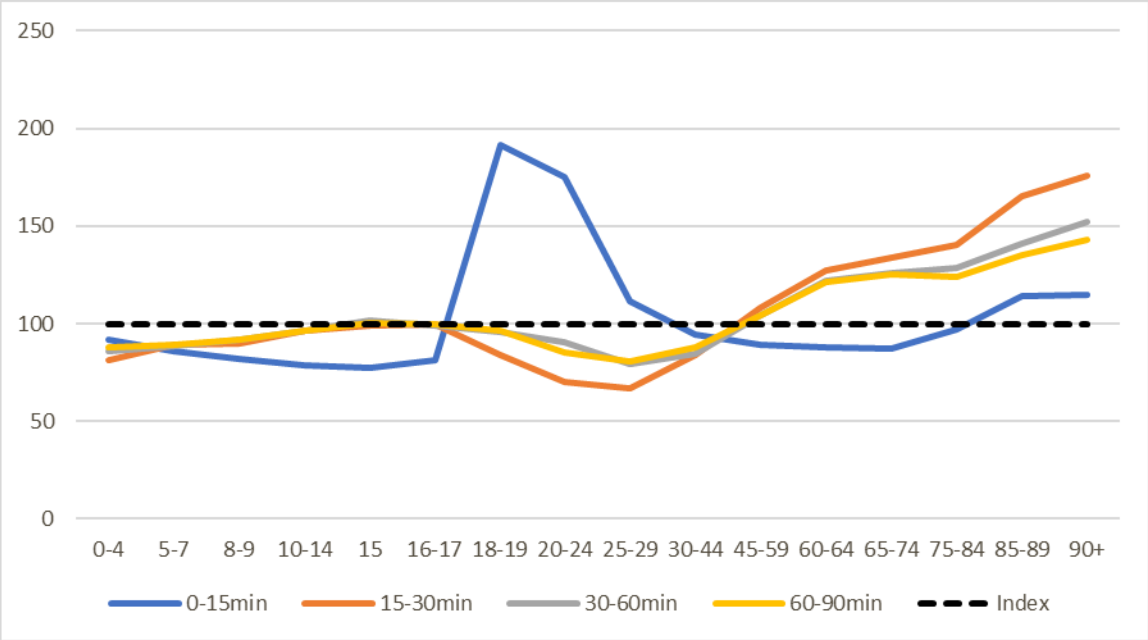
In contrast, 'local', 'regional' and 'greater regional' residents all have an older age profile than the GB average. In particular, there are fewer people than the national average in the 18-44 years age bracket, but much more significantly, far greater numbers of people than the GB average age in the 60+ years age range. The lower than average 18-44 year old demographic, those most likely to have young families, may have some influence on programming.

As a result, the resident market in general is dominated by two age brackets (18-29yrs and 60+yrs) that, as research suggests, tend to spend more time on leisure, cultural and entertainment activities (over and above the national average). Therefore, the propensity to engage with an entertainment venue should be relatively high when compared to the GB average.

However, the key differences in the market will lie with the types of programming being offered, as each age bracket will be attracted to different activities. The types (and range) of programming being offered to these different markets is examined in greater detail in the supply analysis in Section 4 below.

[20] The index of 100 resembles the Great Britain base. Therefore, all values above 100 reflect data that is higher than the base while values below 100 reflects data that is lower than the base.

Figure 9: Population Age Profile, variance above / below the GB average



For the sake of a complete demographic analysis, we also assessed the ethnic profile of each resident catchment area. Our analysis shows that all drive-time segments are *less* ethnically diverse than the UK average (and predominantly white). In addition, the 'immediate' area is generally *more* ethnically diverse compared to the local, regional and greater regional markets, which again is assumed to reflect the large student population and its 'urban' setting.

3.1.2 Socio-economic Analysis (i.e. social grading – ONS)

As mentioned above, understanding the socio-economic profile of residents is another important factor for predicting likely market demand, as it helps identify the levels of disposable income and willingness of residents to invest in leisure, cultural and entertainment activities.

Figure 1. ACORN social grade descriptions

Social Grade	Description	% HRP* population (UK)
AB	Higher & intermediate managerial, administrative, professional occupations	22.17
C1	Supervisory, clerical & junior managerial, administrative, professional occupations	30.84
C2	Skilled manual occupations	20.94
DE	Semi-skilled & unskilled manual occupations, Unemployed and lowest grade occupations	26.05

**Household Reference Persons (HRP) aged 16 to 64*

The analysis of social gradings (see Figure 10) for each drive-time provides a broad assessment of the population at a high-level. It does not consider the finer detail of the population that make up each social grade, and therefore, does not illustrate some of the specific demographic and socio-economic nuances. As such, while these findings provide an indication of the socio-economic status of the population, we should not draw in-depth conclusions from this. More definitive, specific conclusions can be reached through analysis in Section 3.1.4, which examines the population in greater detail.

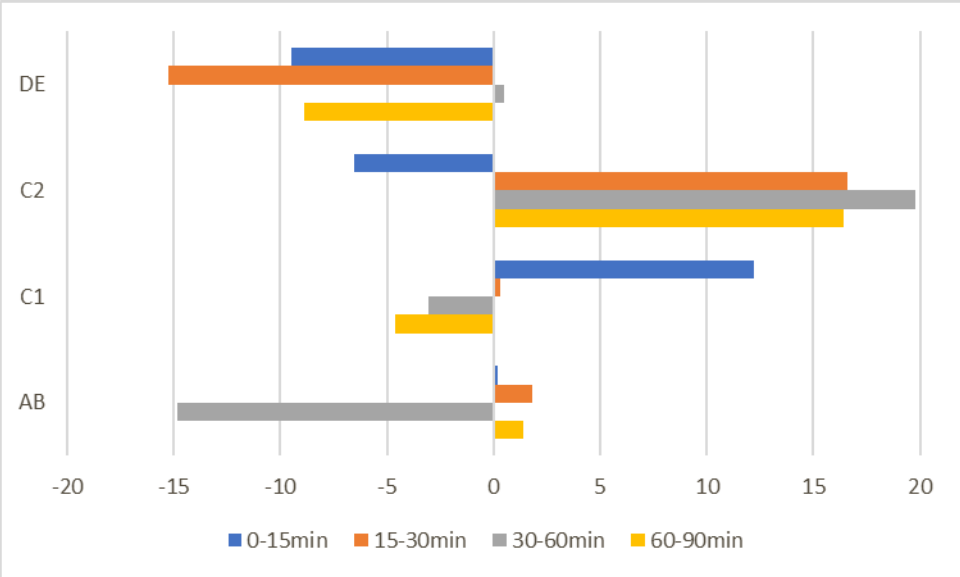
The table below demonstrates that the immediate market (i.e. 15 minute drive-time) is broadly in line with the national average in terms of affluence and the 'AB' category. However, this catchment area has a higher proportion of residents within the 'C1' category, and a below average proportion of residents within the 'C2' and 'DE' categories.

The results for the other catchment areas are also mixed, with no definitive trends regarding the level of affluence. For example:

- **15-30 minute drive-time**. The population is broadly in line with the national average for the more affluent categories – 'AB' and 'C1' – however, a lower proportion of residents are within the 'DE' category.
- **30-60 minute drive-time**. A significantly lower proportion of residents are within the 'AB' category, while a significantly higher proportion of residents are within the 'C2' category, indicating lower levels of prosperity. However, this is tempered by the fact the proportion of residents within 'DE' are in line with the national average.
- **60-90 minute drive-time**. While residents are broadly in line with the national average for the 'AB' and 'C1' categories, a lower proportion of residents are within the 'DE' category.

As a result, a certain degree of caution must be exercised when making generalised statements about the socio-economic profile of the resident catchment areas.

Figure 10: Social Grade, variance above / below the GB average



Note: The GB average is equivalent to a value of '0' on the x-axis. Therefore, all values above '0' equal higher than average, while all values below '0' equal lower than average.

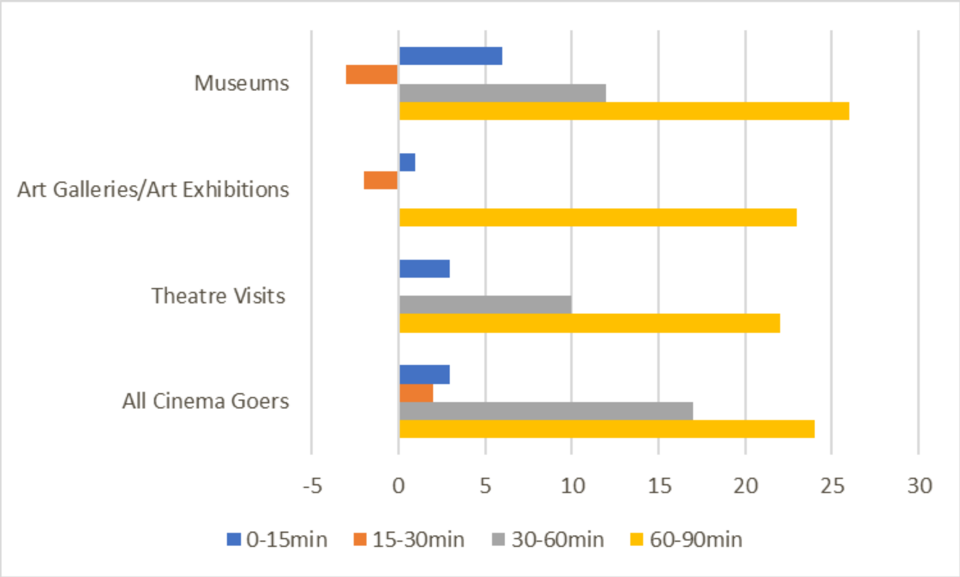
3.1.3 Propensity of Cultural 'Visits' (ACORN)

The third critical metric examined is the propensity of residents to engage in a 'cultural visit', which is a reference to various types of entertainment and leisure activities. In this section, we analysed the four most popular UK cultural activities – museums, art galleries / exhibitions, theatre visits, cinema – for each drive-time (see Figure 11).

As mentioned above, this analysis provides a useful guide for the general interest levels towards a variety of cultural activities, which helps identify the existing (and potential) demand for an entertainment venue.

According to the graph, the propensity to engage in a cultural activity tends to *increase* as the drive-time increases further away from Exeter. This indicates that there is a high degree of potential demand in the 'regional' and 'greater regional' areas, as the number of cultural visits in these areas is significantly higher than the average. However, this picture is likely to be distorted by the presence of more highly-concentrated population centres in these areas (e.g. Plymouth, Bristol), which results in increased participation due to a more intensive programming schedule and a higher volume and range of cultural / entertainment venues.

Figure 11: Cultural Visits, variance above / below the GB average, ACORN



Note: The GB average is equivalent to a value of '0' on the x-axis. Therefore, all values above '0' represent the given percent above the GB average, while all values below '0' represent the given percent below the average.

3.1.4 Acorn Classification (CACI)

To get a more comprehensive understanding of the resident market, including key behaviours and statistics, each drive-time area has also been assessed using Acorn data (developed by CACI Limited).

Acorn is a segmentation tool (distinct from Census) that categorises the population (including households, postcodes and neighbourhoods) into demographic types. The benefit of Acorn data is that it provides an insight into significant social factors and population behaviour, which allows a better understanding of consumers and the people that may engage with a new entertainment venue and its programme.

Note: the ONS and CACI data cannot be directly compared as they are derived from distinct data sources.

Acorn Categories

This section categorises the population within each drive-time area according to different Acorn demographic *categories*, each of which is defined in the table below:

Figure 12: Description of ACORN Categories

CATEGORY	DESCRIPTION
1. AFFLUENT ACHIEVERS	These are some of the most financially successful people in the UK. They live in wealthy, high status rural, semi-rural and suburban areas of the country. Middle aged or older people, the 'baby-boomer' generation, predominate with many empty nesters and wealthy retired. Some neighbourhoods contain large numbers of well-off families with school age children, particularly the more suburban locations.
2. RISING PROSPERITY	These are generally younger, well educated, and mostly prosperous people living in our major towns and cities. Most are singles or couples, some yet to start a family, others with younger children. Often these are highly educated younger professionals moving up the career ladder.
3. COMFORTABLE COMMUNITIES	This category contains much of middle-of-the-road Britain, whether in the suburbs, smaller towns or the countryside. All lifestages are represented in this category. Many areas have mostly stable families and empty nesters, especially in suburban or semi-rural locations. There are also comfortably off pensioners, living in retirement areas around the coast or in the countryside and sometimes younger couples just starting out on their lives together.
4. FINANCIALLY STRETCHED	This category contains a mix of traditional areas of Britain. Housing is often terraced or semi-detached, a mix of lower value owner occupied housing and homes rented from the council or housing associations, including social housing developments specifically for the elderly. This category also includes student term-time areas. There tends to be fewer traditional married couples than usual and more single parents, single, separated and divorced people than average.
5. URBAN ADVERSITY	This category contains the most deprived areas of large and small towns and cities across the UK. Household incomes are low, nearly always below the national average. The level of people having difficulties with debt or having been refused credit approaches double the national average. The numbers claiming Jobseeker's Allowance and other benefits is well above the national average.
6. NOT PRIVATE HOUSEHOLDS	These are postcodes where the bulk of the residents are not living in private households

Of particular importance to this study, in terms of measuring potential demand for an entertainment venue, are the ***Affluent Achievers*** and the ***Rising Prosperity*** categories. According to the Acorn classifications, *Affluent Achievers* are generally healthy, wealthy and confident consumers of cultural, leisure and entertainment activities, while the *Rising Prosperity* category is comprised of younger, well-educated and mostly prosperous people likely to go to the theatre, cinema and generally engage in the culture and nightlife of a given town or city.

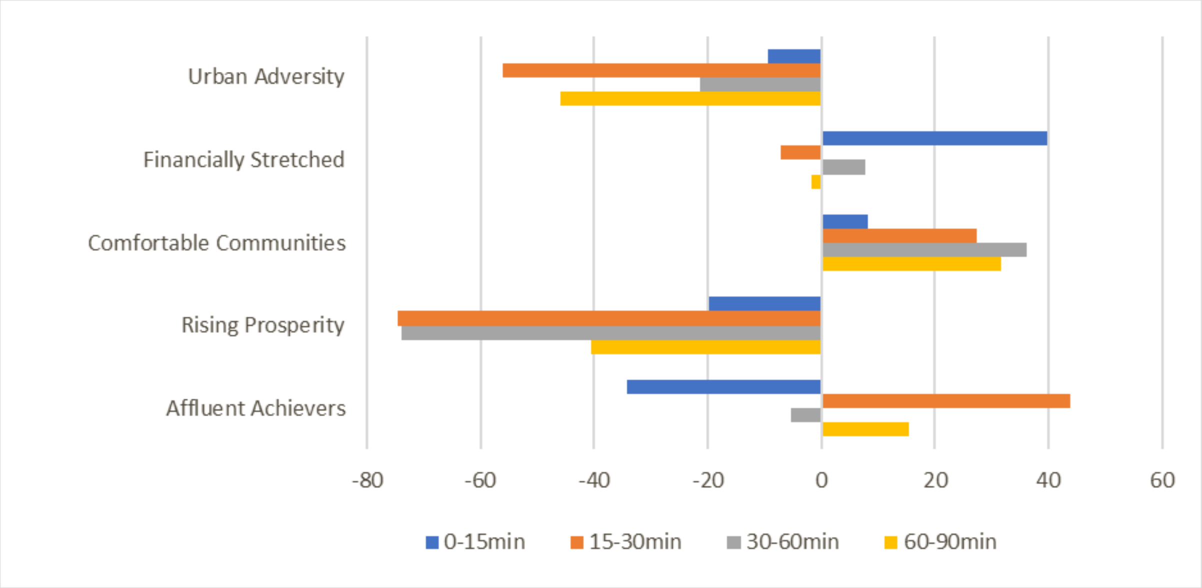
In addition, the ***Comfortable Communities*** category also demonstrates some importance to the study, as this refers to middle-class and 'stable' residents who also appreciate music and film activities in their leisure time.

Figure 13 illustrates the proportion of the population in each Acorn category for each drive-time area compared to the GB base. According to this chart, the immediate catchment area (0-15 minute drive-time) is under-represented in both *Affluent Achievers* and *Rising Prosperity*, which could have an adverse impact on the consumer demand for activities offered by a new entertainment venue. This is exacerbated by the above average proportion of *Financially Stretched* residents – again, assumed to be partly driven by the large student population – who typically have less disposable income to invest in culture, leisure and entertainment activities and can be less engaged, depending on the nature of the offer.

In addition, as drive-time increases away from Exeter, particularly the local catchment area, there is a higher proportion of *Affluent Achievers* compared to the GB average. As such, potential demand for entertainment venue activities and programmes are likely to increase further out.

However, these results are slightly mixed, as demonstrated by the above average proportions of *Comfortable Communities* across all drive-times, which indicates a higher propensity to consume music and film-related activities.

Figure 13: Acorn Population Profile, by Category



Note: This excludes the 'not private households' category, as it is not statistically significant.
The GB average is equivalent to a value of '0' on the x-axis. Therefore, values above '0' represent the given percent above the GB average, while all values below '0' represent the given percent below the average.

Acorn Groups

In addition, Figure 14 below provides a more targeted analysis of the concentration of different Acorn *groups* within each category. This enables a clearer, more comprehensive and more accurate picture of the population demographics for each drive-time area.

Figure 14: Acorn Population Profile, Indexed by Group (n.b. the darker the shading, the greater the concentration)

CATEGORY	GROUP	0-15min	15-30min	30-60min	60-90min
1. AFFLUENT ACHIEVERS	1.A Lavish Lifestyles	7	11	9	42
	1.B Executive Wealth	53	113	65	95
	1.C Mature Money	91	205	147	154
2. RISING PROSPERITY	2.D City Sophisticates	39	2	4	49
	2.E Career Climbers	103	39	38	65
3. COMFORTABLE COMMUNITIES	3.F Countryside Communities	36	219	244	284
	3.G Successful Suburbs	76	169	103	115
	3.H Steady Neighbourhoods	100	45	86	52
	3.I Comfortable Seniors	140	174	161	137
	3.J Starting Out	256	74	121	101
4. FINANCIALLY STRETCHED	4.K Student Life	589	6	100	62
	4.L Modest Means	81	115	124	103
	4.M Striving Families	87	108	105	106
	4.N Poorer Pensioners	69	80	88	98
5. URBAN ADVERSITY	5.O Young Hardship	82	96	134	82
	5.P Struggling Estates	55	22	49	31
	5.Q Difficult Circumstances	159	21	65	60

Note: This excludes the 'not private households' category, as it is not statistically significant.
The GB average is equivalent to a value of '100'. Therefore, values above '100' are higher than the GB average, while all values below '100' are lower than the GB average.

From this analysis, focusing only on groups with an index greater than 200 (i.e. more than double the national average), the following insight is drawn:

- The immediate area (0-15 minute drive-time) is characterised by lower levels of affluence, demonstrated by the high concentrations of *Student Life* and *Starting Out* groups and relatively low concentrations of groups within *Affluent Achievers* or *Rising Prosperity*.
- As drive-time increases further away from Exeter, the population appears to possess greater levels of wealth and prosperity, driven by increases in the concentration of *Mature Money* and *Countryside Communities* groups.

This supports the analysis outlined above in Figure 13, whereby residents proximate to Exeter city centre can generally be characterised by a lower propensity to engage in activities provided by an entertainment venue; in contrast, residents further out from Exeter appear to possess a greater propensity to engage in such activities, demonstrated by their tendency to invest more time and resources in leisure-related entertainment activities.

Acorn Types

We have also identified the relevant Acorn population *types* that help inform the potential demand for an entertainment venue. This enables an even clearer, more comprehensive and more accurate picture of the population demographics for each area to assess the propensity to consume relevant leisure, culture and entertainment activities.

Figure 15 below details five Acorn types that are of interest to this study – and also statistically significant in terms of population size – while a description of each type is outlined in Figure 16.

According to this analysis, again focusing only on types with an index greater than 200, similar conclusions can be reached, notably:

- The more affluent and culturally aware types that typify higher levels of potential demand – *Retired and empty nesters* and *Upmarket downsizers* – appear in greater concentrations further out from Exeter, particularly within a 15-30 minute drive-time.
- There are a higher proportion of *Educated families in terraces* in the immediate area, which are characterised by lower levels of wealth yet also have some interest in undertaking relevant leisure activities.

Figure 15: Acorn Population Profile, Relevant *Types* (n.b. the darker the shading, the greater the concentration)

CATEGORY	GROUP	TYPE	0-15min	15-30min	30-60min	60-90min
AFFLUENCT ACHIEVERS	Mature Money	Retired and empty nesters	72	335	249	262
		Upmarket downsizers	120	262	205	187
RISING PROSPERITY	Career Climbers	First time buyers in small, modern	152	34	31	65
COMFORTABLE COMMUNITIES	Comfortable Seniors	Older people, neat and tidy	136	155	152	132
	Starting Out	Educated families in terraces	446	42	151	89

Note: We have only included population types that are 'statistically significant' (e.g. comprise at least 1% of total population within a catchment area)
The GB average is equivalent to a value of '100'. Therefore, values above '100' are higher than the GB average, while all values below '100' are lower than the GB average.

Figure 16: Description of Acorn Categories

TYPE	DESCRIPTION
Retired and empty nesters	These streets are typically dominated by older people, with the majority of the population usually aged over 55. Approaching half of the households might be retired, mostly supported by private pensions. It is more usual that, prior to retirement, many will have had senior managerial or professional occupations. Those still in work might have incomes a good deal higher than the average while the retired might have a pension income below the average UK worker. Leisure time might involve gardening, wildlife, or arts and crafts.
Upmarket downsizers	A significant number of these small flats are owned by pensioners with younger professionals and managers usually owning the rest of the housing. These upmarket flats are valued above the national average house price. Prior to retirement the pensioners were often professionals and managers, many achieving good educational qualifications in an era when fewer people went to university. Some typical interests of these people might be wine, antiques, cultural events, walking and photography.
First time buyers in small, modern homes	Singles and couples in their twenties and thirties are typical of these areas. They will own or rent the small flats that form the majority of the housing. Many of these people have professional or white-collar careers and their incomes are above average. Since this demographic type belongs to the *Rising Prosperity* category, they like to eat out in restaurants, go to the theatre and cinema and make the most of the culture and nightlife of the big city.
Older people, neat and tidy neighbourhoods	Many of these people have, or had before their retirement, white-collar, skilled or semi-skilled jobs. Incomes are generally average, or lower, although a few households may be earning more. In addition to significant savings accounts these older people tend to have a range of investments, ISAs, shares, unit trusts, National Savings. As a result outgoings can be less than average and spending power may be higher than suggested by the average incomes. More usual leisure interests might include gardening, wildlife, travel, arts and crafts.
Educated families in terraces, young children	These are younger couples generally at earlier stages of their careers. Some have started a family and these streets tend to have young rather than school age children. Household incomes may be above the average. Occupations tend to be white-collar, junior managerial or professional. They are moderately frequent users of the internet, although some might prefer active lifestyles with evening social and leisure activities. In addition to arranging financial services more common purchases include cinema and theatre tickets, music and films.

3.1.5 'Audience Agency' insight

The Audience Agency collects and provides data which tracks existing and potential audiences for arts, entertainment and cultural activities. There are several different methods of analysis used, based on available data such as TGI Leisure (Target Group Index), Mosaic 6 profiles, Experian and BMRB (British Market Research Bureau).

Further to this, a number of different research methods are used, such as; the Audience Finder Survey and the Audience Finder Box Office Data.

Taken together, these offer a useful and reliably audited picture of the potential for attendance and participation for any given area.

An extra analysis has been commissioned as part of this study, providing data on the following four catchment areas, with the 'Local' area and 'Greater Regional' area as defined in Section 2.1.

5. **'Local' area** (reaching Teignmouth, Newton Abbot, Moretonhampstead, Coppleston, Tiverton, Honiton, Exmouth) – within a 30-minute drive-time
6. **'Greater Regional' area** (reaching St Austell, White Cross, Wadebridge, Bristol, Wincanton, Weymouth) – within a 90-minute drive-time
7. **South West** (reaching Gloucester, Swindon, Salisbury, Bournemouth, Poole)

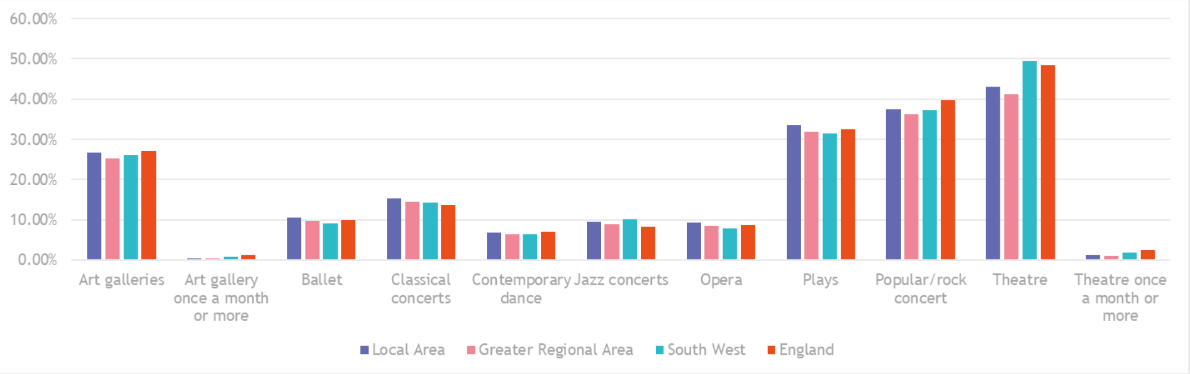
8. **England** (used as a reference for the National Average)

It is important to note that whilst the ACORN data used in Section 2 used drivetime doughnuts to separate the catchment areas, the Audience Agency uses drivetime circles, which means the data for each catchment area is included in the broader catchment area, e.g. 'Greater Regional' area encompasses data for the 'Local area' and the 'South West' encompasses data for the 'Greater Regional area and the 'Local area' but ensures there are no double counts of data.

As expected, in absolute terms there is a significantly higher count for each category discussed below as the geographical area expands. Areas are therefore assessed on a percentage level in order to draw insightful comparisons and discussions below. The data and insight is based on adults over the age of 15 and attendances for the past 12 months.

Figure 17 shows the recorded arts attendances for the four catchment areas. Theatre is the most attended art form in all four areas, followed by Popular/rock concert, Plays and Art Galleries. However, the percentage of people who attend theatre once a month or more is relatively low. Audiences in the Local Area attended more Ballet, Classical Concerts, Contemporary Dance, Jazz and Plays when comparing with the other three catchment areas.

Figure 17: Arts Attendance



Audience Spectrum Analysis

The Audience Spectrum Analysis indicates the types of attenders and participants of arts and cultural events.

The three largest groups for all four catchments are Dormitory Dependables, Trips & Treats and Home & Heritage. Detailed descriptions of these categories can be seen in Figure 19. Interestingly, the Local Area catchment contains a population which is highly engaged and interested in arts and cultural activity when compared to the other three catchment areas. Figure 18 shows there is a higher percentage of people in the Local Area who fall in the Commuterland Culturebuff, Experience Seekers and Dormitory Dependable categories in comparison to the Greater Regional, South West and England. Furthermore, there is a higher proportion of Metroculturals in the Local area (0.54%) than the Greater area (0.13%) – although the actual size of this population is small in comparison to others.

Figure 18: Audience Spectrum Analysis

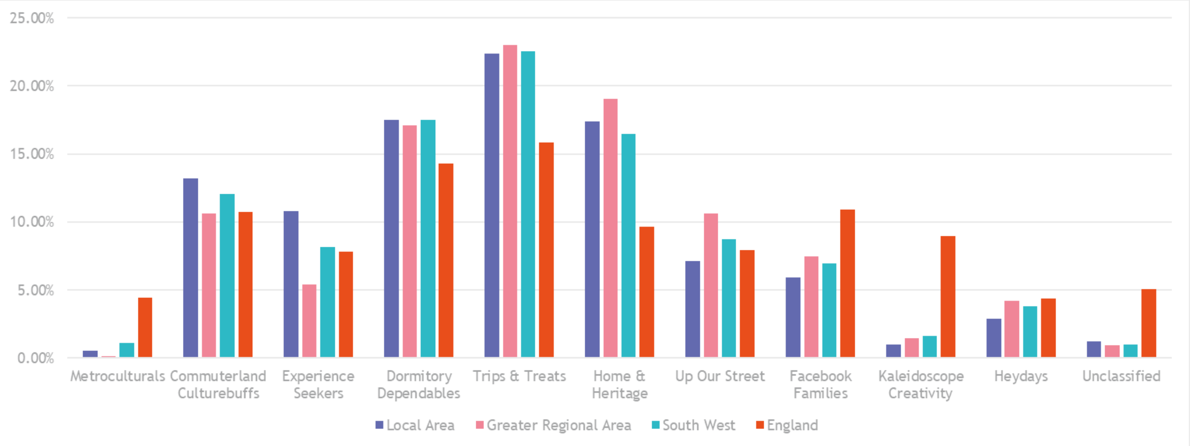


Figure 19: Audience Spectrum Segment Description

Audience Spectrum segment	Engagement Rank	Brief Profile description and interests
Metroculturals	1	Highly active socially and passionate about arts and culture. They are confident and knowledgeable in their preferences, diverse in age and background but united by their high-levels of education, well-paid jobs, liberal outlook and active lifestyles
Commuterland Culturebuffs	2	Affluent and professional consumers of culture, with broad tastes but a leaning towards heritage and more classical or traditional offerings. Often mature families or retirees they tend to be frequent attenders, willing to travel and pay for premium experiences.
Experience Seekers	3	Highly active, diverse, social and ambitious, engaging with arts on a regular basis. This is made of students, recent graduates and those in the early to mid-stages of their career who tend to live close to city centres. They are mostly in search of new things to do and have disposable income to spend on a variety of leisure activities
Dormitory Dependables	4	Suburban and small towns interest in heritage activities and mainstream arts. Many are thriving, well off mature couples or busy older families. Their life-stage coupled with more limited access to an extensive cultural offer mean that culture is more an occasional treat or family or social outing than an integral part of their lifestyle
Trips & Treats	5	Mainstream arts and popular culture influenced by children, family and friends. While this group may not view arts and culture as a passion, they are reasonably culturally active, despite being particularly busy with a wide range of leisure interests
Home & Heritage	6	Rural areas and small town, day-time activities and historical events. This is made up of a more mature group that is generally conservative in their tastes.
Up Our Street	7	Modest in habits and means, popular arts, entertainment and museums. Many are older and have some health issues.
Facebook Families	8	Younger suburban and semi-urban, enjoy live music, eating out and pantomime and often go out as a family.

Audience Spectrum segment	Engagement Rank	Brief Profile description and interests
Kaleidoscope Creativity	9	Mixed age, living circumstances, resources and cultural backgrounds. They have low level engagement but do attend free local events, outdoor arts and festivals
Heydays	10	Older, less engaged in arts and cultural activity. If they do engage it is likely to be in crafts, knitting, painting organized by their sheltered housing, church group or community library
Unclassified	11	Those which did not fall into any of the above categories or did not disclose information to allow them to be categorized.

Audience Engagement Indicators

The Audience Agency provides recommended ways of engaging with these likely groups of attenders, including programme preferences, environment, pricing structures and advertising response. The following indications for the top six groups who are most engaged with arts and culture may be useful to inform current planning for the new entertainment venue in Exeter.

How to engage	Programme Preferences	Environment
Metroculturals (0.54% of Local Area)	The most open-minded of all segments, Metroculturals are the best prospects for any kind of experimental work. With wide and informed tastes they are obvious targets for more obscure or niche cultural offerings. However, as people with highly developed critical faculties they can be demanding. It is important to acknowledge their very wide ranging tastes, from early music to digital art. They appreciate that their refined interests are known and that these are recognised and inform communications directly to them. Those in the group that are avid cultural consumers are likely to wield a good deal of influence on their peer networks. Their engagement with, and good opinion of, an event or exhibition in its early stages could be crucial to its long-term success in terms of audience engagement. They are the small group of "innovators" in the cultural market place that help to drive the tastes of early adopters and the early majority.	Environment is important to all audiences and participants, but it may be the least important to Metroculturals amongst all the segments. For them, the art is the thing, indoors, outdoors, all weather – they will follow their interests. Nevertheless, this group have large amounts of disposable income and propensity to give resources to the cultural sector, e.g. they respond very well to appeals to spend money in the non-profit, high-quality cafes and shops of cultural institutions.
Commuterland Culturebuffs (13.23% of Local Area)	Programme offerings such as plays, musicals, opera, ballet and classical music are core artistic choices. Guarantees of quality are important so classic or traditional productions and established performers and companies are popular. The endorsement of well-known and respected artists or experts will be well received. They are also open to artforms such as contemporary dance and jazz, literary events, video/electronic arts and crafts, but these are generally not as well attended as more traditional artforms.	There is a strong social motivation behind their arts attending, so the opportunity to share food and drink in pleasant café/restaurant surroundings at the events themselves will be a benefit. High quality facilities and customer service would be important features to promote. Families tend to be older, but there are significant numbers for whom it would be worth foregrounding any Family Friendly features.

How to engage	Programme Preferences	Environment
Experience Seekers (10.79% of Local Area)	Open to most things, their cultural engagement will cross genres and artforms, indoors or out, familiar or alternative, contemporary or historical. Loyal only to the idea of going out and engaging with new things, their social networks (on and offline) will drive their choices, as well as some spontaneous or more random decisions. For example, unusual combinations may grab their attention – roof top cinema, late night openings, site-specific, music in the grounds of heritage sites, specific street festivals. If there's an element of cultural specificity, taking part or immersion, this may form a larger part of the attraction. They are unlikely to want to miss out on the latest 'blockbuster' whether at a theatre, cinema, museum, gallery or must-see heritage site, but are less likely to be seen at pantomimes, or other family-orientated activities. They will make a bee-line for live music, exhibitions, plays/drama and musicals.	For this group the whole experience should be considered – food, drink, ambience, service, facilities. Site-specific work in unusual venues, experiential or immersive offers from outdoor to pop-up may all engage if they offer new experiences and opportunities to socialise. This group above all are looking for vibrant atmospheres to enjoy experiences with their friends and colleagues.
Dormitory Dependables (17.51% of Local Area)	Live music is a chief interest of Dormitory Dependables, with an emphasis on the popular or mainstream. They attend rock and pop events more than any other group, with classical or choral music less popular than average. As their preference for the popular suggests, pantomime, musicals, live dance events and street arts are also relatively sought after. A large number also attend plays and drama, but are not likely to do so more than once or twice a year. There are a large proportion of families with children; so family friendly programme choices form an important part of the mix.	As reasons for attending the arts tend to revolve around finding opportunities to relax, socialise and be entertained – often by way of a special treat – the surroundings need to be mindful of providing suitable facilities and ambiance to fulfil this need.
Trips & Treats (22.35% of Local Area)	Programme offerings such as plays, musicals, opera, ballet and classical music are core artistic choices. Guarantees of quality are important so classic or traditional productions and established performers and companies are popular. The endorsement of well-known and respected artists or experts will be well received. They are also open to art forms such as contemporary dance and jazz, literary events, video/electronic arts and crafts, but these are generally not as well attended as more traditional art forms	There is a strong social motivation behind their arts attending, so the opportunity to share food and drink in pleasant café/restaurant surroundings at the events themselves will be a benefit. High quality facilities and customer service would be important features to promote.
Home & Heritage (17.39% of Local Area)	Annual events such as pantomime, carnival or circus and street arts will engage them, alongside branded shows, live bands or blockbuster exhibitions. At a local level it may be possible to support them with a more 'risky' or unexpected offer, but this will involve a certain amount of handholding – which may be effective through an initially participative route	At the younger end the environment needs to be family friendly, at the older end the environment would need space and opportunities for socialising – whether in a bar, restaurant, foyer or outside area

3.2 Tourist Market

In addition to the resident population, a new entertainment venue could capitalise on tourist visits to Exeter and Devon more generally. However, given the scale of tourism and its seasonality in particular, the resident market will always be of greater significance to its long-term success. For instance, Exeter has a local population of 219,738 and had on average 2.05 million domestic tourists visiting between 2013 and 2015. There were, however, only 103,000 overseas tourists visiting between 2013 and 2015. Moreover, tourists are less likely to casually attend events unless it is central to their visit. Set out below are the recent figures reported by Visit Britain for domestic and inbound (overseas) tourism.

3.2.1 Domestic tourism

Figure 20 below categorises overnight domestic tourists, in terms of volume and value, according to the main purpose of travel: Holiday, Visiting Friends or Relatives (VFR) or Business. Overall, looking at the 3-year average (from 2013-2015), an average total of 460,000 annual trips were made to the area, resulting in around 1.6 million nights stayed and total spend of £64 million.

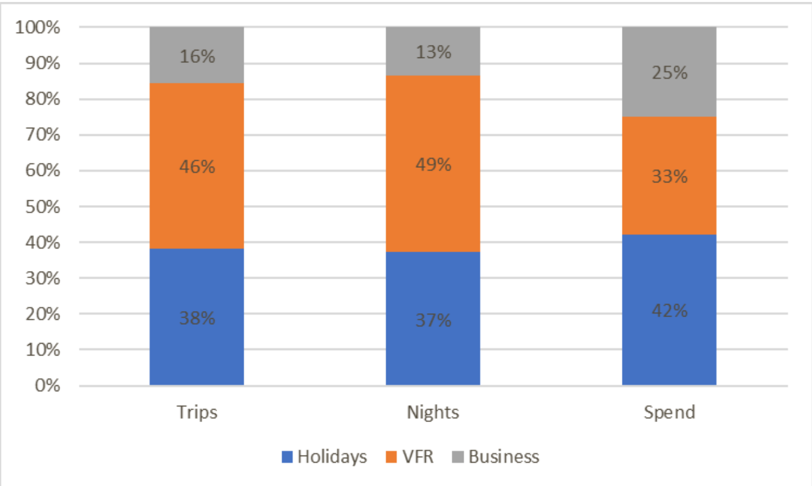
Figure 20: Volume and Value of Domestic Trips, Exeter (3-year Average, 2013-2015)

Location	All Tourism			Holidays			VFR			Business		
(millions)	Trips	Nights	Spend	Trips	Nights	Spend	Trips	Nights	Spend	Trips	Nights	Spend
Exeter	0.46	1.59	£64	0.18	0.59	£27	0.21	0.79	£21	0.07	0.21	£16
Percentage of all tourism	100%	100%	100%	38%	37%	42%	46%	49%	33%	16%	13%	25%

Source: Great Britain Tourism Survey 2015

The distribution of domestic tourists to Exeter – illustrated in Figure 21 – shows that the majority of overnight trips were for VFR purposes (46%), with around 38% visiting for a holiday and 16% travelling on business. VFR tourists account for the largest number of nights (49%) but holidays account for the largest proportion of spend (42%). Worth noting is that for VFR tourism, their hosts can often be the most influential decision maker in terms of things they do when visiting.

Figure 21: Distribution of Domestic Tourist Market, Exeter (3-year Average, 2013-2015)



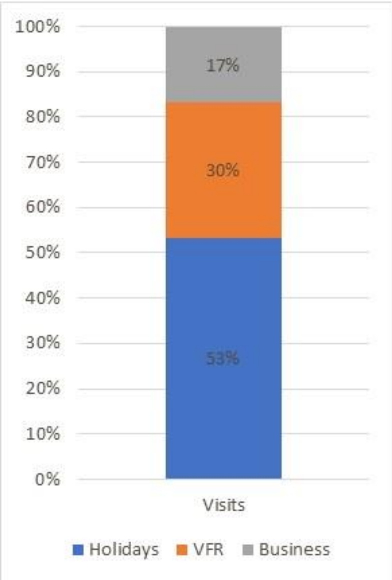
Source: Great Britain Tourism Survey 2015

3.2.2 Inbound (overseas) tourism

For inbound (overseas) tourism, an average annual total of 103,000 visits were made to Exeter between 2013 and 2015. In 2015, inbound visits posted a year-on-year increase of 31% to 120,000. Broadly speaking therefore, overseas tourism accounts for around 20% of all tourism (including domestic trips) to Exeter.

Of the inbound tourism, holidays accounted for the greatest proportion (53%), followed by VFR (30%) and finally business (17%).

Figure 22: Distribution of Inbound (overseas) Tourist Visits, Exeter (3-year Average, 2013-2015)



4 Market Supply Analysis

This section is both in response to the council's brief and has the purpose of providing market context for the study. Furthermore, it ensures that any decisions are informed by the objective appraisal based on data and an understanding of the current market supply.

In this section, we have reviewed the following supply-side aspects of the market:

- A summary of changes made to the Arts Council England National Portfolio 2018-22
- A review of existing venues operating in the South West (broadly aligning with the 90-minute drive-time catchment within the demand analysis)
- A note on those entertainment venues within the South West proposing to expand or renovate their facilities
- A summary of multi-site Theatre operators and the venues operated by them in the South West
- A review of broadcasting theatres and their links to facilities in the South West
- A brief analysis of 1000+ capacity theatre venues from across the UK
- Comparator insight and best practice gleaned from a selection of venues

4.1 Arts Council England: National Portfolio 2018-22

ACE's *National Portfolio* for 2018-22 was announced on 27 June 2018 with the following points of interest being noted for Exeter:

- No change to annual funding for the five NPOs in Exeter (totalling £677k pa)
- No change to Plymouth Theatre Royal (£1.19m/annum)
- A total of ninety-five NPOs in the South West (up two on the previous portfolio) with:
    - 26% annual funding increase from £17.9m to £22.5m (excluding museums and libraries)
    - 23 organisations have dropped out; 25 organisations have entered the portfolio; 7 NPOs have received grant increases (4 being theatre); funding for 63 NPOs remains unchanged.

4.2 Venues in the South West (c.90-minute drive-time)

Below we have analysed a broad range of entertainment venues operating in the South West deemed to be 'comparable' to a new entertainment venue in Exeter either in terms of size or the nature of programme i.e. either 1,000+ capacity and/or includes relevant artistic or cultural programming.

Broadly speaking, these correspond to the 90-minute drive-time distance from Exeter as applied to demand-side analysis above. However, it includes a number of exceptions, such as Poole Lighthouse and Bournemouth International Centre, as these are significant entertainment venues and lay on the cusp of the 90-minute boundary.

Below are some initial observations derived from the analysis.

- Of the sixty-six venues analysed, 25% of venues have a capacity of 1,000+ indoor theatre-style seating, four of which are within 45 miles of Exeter. The closest, Westpoint Arena (on the outskirts of Exeter) was built in 2009, has an indoor seating capacity for 6,000 people and is used for concerts, exhibitions and national shows (although it is noted that for the majority of its programme it would not be directly comparable to a new entertainment venue being considered). In addition, Westpoint offers free on-site parking for 1.5 hours, has a café and is hired out for conferences, meetings and weddings.
- Music events were the most popular type of events being hosted at fifty-four venues. This was followed by plays (35 venues), comedy (33 venues), dance (33 venues), musicals (24 venues), pantomime (22 venues), film (20 venues) and exhibitions (14 venues). Forty-three venues (65%) were also regularly used for other purposes such as community events, spoken word, talks and other special interest events e.g. cocktail classes.
- Forty-one venues have been renovated since the year 2000 (two of which were either newly built or repurposed after 2000). In addition, eleven venues are either in the process of, or have plans to redevelop or renovate their venue. These are noted in Section 4.3 below.
- 90% venues have at least one *Food and Beverage* facility available on site, with approximately three quarters of the venues having at least a *Bar* on site.
- Almost a quarter of the venues have an *Art Gallery* exhibiting work of local artists with an additional two venues displaying on-screen exhibitions of art from around the world.
- One third of venues have a *Cinema* or *Screening Facilities* showing the latest blockbuster movies, old classics or live relayed theatre performances broadcast by operators such as the National Theatre Live and the Royal Shakespeare Company.
- All venues have been made accessible to wheelchair users with some venues also catering to people in need of audio assistance.
- The North Devon's Theatres' Trust which operates the Queens Theatre Barnstaple and Landmark Ilfracombe entered administration in 2017. Following their closure, they have recently re-opened under the management of Parkwood Leisure (on a short-term arrangement). The community and council are understood to be exploring solutions for their longer-term operation. While the venues and their facilities have been included in the table they have been excluded from the figures reported above.
- An interesting observation from a capital funding perspective is that a few of the Theatres offer the opportunity to 'Sponsor a Seat', allowing anyone to pay a fee to have a named plaque on a seat in the auditorium for a range of between £150 and £250. The plaque typically carries the name or initials of the person for a minimum of 5 years or for the lifetime of the seat.

Figure 23. Venues in the South West (c.90-minute drive-time)

Venue	Type	Year Established	Distance from Exeter (Miles)	Main Auditorium / space 'Theatre Style' Seated Capacity	Play	Musical	Music Event	Stand-up Comedy	Cinema/ Broadcasts	Dance	Exhibition	Pantomime	Other	Art Gallery	On-Site Parking	Venue Hire	Café	Bar	Bistro	Restaurant	Renovated after 2000	Renovation Plans
IN EXETER																						
The Great Hall University of Exeter	Concert Hall		-	1,435																		
Riverside Leisure Centre	Leisure Centre		-	1,200																		
Exeter Cathedral	Cathedral	1340	-	1,000																		
Sandy Park	Conf / Banq centre		-	800																		
Corn Exchange Exeter	Multipurpose		-	500																		
St Peter's School	School		-	500																	1	
Exeter Northcott Theatre	Theatre	1967	-	460																		
Exeter Barnfield Theatre	Theatre	1972	-	288																		
Exeter Phoenix	Multipurpose	1911	-	270																		
The Cavern	Live Music Venue	1991	-	**220																		
America Hall, Exeter	Community Centre	1952	-	200																		
Cygnet Theatre	Theatre	1980	-	100																		
The Bike Shed Theatre	Theatre	2010	-	50																	1	
Royal Albert Memorial Museum	Museum	2011*	-																		1	
Lemon Grove University of Exeter	Music/Events		-																			
BEYOND EXETER																						
Westpoint Arena	Events venue	2009	6	6,000																		
BIC - Windsor Hall, Bournemouth	Events venue	1984	84	4,012																		
Colston Hall, Bristol	Events venue	1951	81	2,075																		
Bristol Hippodrome	Theatre	1912	81	1,951																		
BIC - Purbeck Hall, Bournemouth	Events venue	1984	84	1,700																		
O2 Academy, Bristol	Events venue	2001	81	**1,600																	1	
The Lighthouse - Concert Hall, Poole	Arts centre	1978	79	1,500																		
Princess Theatre Torquay	Theatre	1961	23	1,491																		
Bournemouth Pavilion	Theatre	1920	84	1,458																		
Plymouth Theatre Royal - The Lyric	Theatre	1982	45	1,320																		
BIC - Solent Hall, Bournemouth	Events venue	1984	84	1,300																		
BIC - Tregonwell Hall, Bournemouth	Events venue	1984	84	1,100																		
Pavilion Theatre, Weymouth	Theatre	1958	67	988																		
Hall for Cornwall	Events venue	1997	87	969																		
Octagon Theatre, Yeovil	Theatre	1988	51	850																		
Queens Barnstaple	Theatre	1993	45	700																		
The Lighthouse - Theatre, Poole	Arts centre	1978	79	669																		
Babbacombe Theatre, Torquay	Theatre	1939	23	600																		
Exmouth Pavilion	Theatre		13	550																		
Bridport Electric Palace	Arts Centre	1926	45	500																		
Landmark, Ilfracombe	Theatre	1998	58	480																		
Bristol Old Vic	Theatre	1766	81	450																		
Langstone Cliff Hotel, Dawlish	Hotel and Conf	1946	13	400																		
Axminster Guildhall	Guildhall	1931	32	400																		
The Brewhouse, Taunton	Events venue	1977	33	350																		
Plymouth Athenaeum	Theatre	1812	45	340																		
Devonport Playhouse, Plymouth	Theatre	1987	46	321																		
Tiverton Community Arts Centre & High School	Arts Centre	2012	16	311																		
Honiton Beehive	Arts centre	2015	22	300																	1	
Dorchester Arts Centre	Arts Centre		61	300																		
The Exchange, Dorset	Arts Centre	2005	71	300																		
Manor Pavilion Theatre, Sidmouth	Arts Centre		16	277																		
Newton Abbot Racecourse	Conf Centre		17	250																		
Dame Hannahs at Seale Hayne, Newton Abbot	Conf and Music	2010	17	250																	1	
Seaton Gateway	Theatre	2011	24	250											2							1	
The Bay Theatre Weymouth College	Theatre		66	250																		
Exeter Racecourse	Conference Centre		8	250																		
Plough Arts Cente, Torrington	Arts Centre	1974	44	240																		
Marine Theatre, Lyme Regis	Theatre	1930	38	220																		
Pavilions Teignmouth	Arts centre	2016	15	218											2							1	
The House at Plymouth University	Theatre	2014	44	214																		
Bridport Arts Centre	Arts Centre	1973	44	194																		
Alexandra Cinema, Newton Abbot	Cinema	1871	17	186																		
Tiverton New Hall	Town Hall	1970s	15	182																		
Plymouth Theatre Royal - The Drum	Theatre	1982	48	175																		
Shaftesbury Theatre, Dawlish	Theatre	1959	13	141																		
Barbican Theatre, Plymouth	Theatre	1980	45	140																		
Powderham Castle, Kenton	Castle	1600s	8	120																		
Teignmouth Players	Theatre	1984	15	50																		
Plymouth Theatre Royal - The Lab	Theatre	2013	49	50																	1	
Escot Park – Beautiful Days, Ottery St Mary	Outdoor festival	2003	13																		1	
					53%	36%	82%	50%	30%	50%	21%	33%	65%	23%	42%	92%	50%	71%	9%	18%	62%	29%

Notes:
** The Royal Albert Memorial Museum was originally built in 1868 but converted to a museum in 2011, and is now also used as a venue*
*** Standing only venue*
1 denotes venues which were built or re-purposed after the year 2000
2 denotes venues which offer on-screen exhibitions of art from around the world
"Conf" stands for Conference, "Banq" stands for Banqueting

4.3 Proposed Venue Expansions and Renovations

Several venues in the South West are either in the process of or have plans to be renovated and/or expanded, some as a result of successful grant applications. This section provides an understanding of how the supply of venues is evolving to maintain, service or grow this market. The following excerpts have been taken from their respective websites and latest news pages and are organised based on their proximity to Exeter city centre.

Exeter Barnfield Theatre (0 Miles, 286 seating capacity)
The building is owned by Exeter City Council and leased to Barnfield Theatre Limited who run the theatre. In January 2007, it received £200,000 to refurbish its interior. The front of house main foyer was lightly updated in 2015. An ambition to expand the facility up to 1,000 seats have been proposed.

Boat Shed Theatre – Exeter 2020 (0 Miles from Exeter, 250 people seating capacity)
Exeter Canal and Quay Trust granted a two-year exclusivity deal to the Bike Shed Theatre to raise funds to create a lively arts hub, which will open seven days a week from 8.30am to midnight at Maclaines Warehouse along the canal basin opposite Haven Banks Outdoor Education Centre. The plans propose to turn the derelict warehouses at Exeter Quay into a £4m creative space, which will include a new theatre (250 capacity), live music hall, cafe/bar, bakery and indoor market. To turn the project into reality, an estimated £3m of grant funding is being sought. The Heritage Lottery Fund and European Regional Development Fund are targeted. The plans include adding a sloping glass-based extension facing Bar Venezia, which will be the cafe/bar and replicates what the oldest warehouse looked like when it was built. The second floor will house a 250-seat theatre with balcony and a moveable, non-raised stage, as well as a large space for music and comedy, and a co-working space for creative companies such as artists, graphic designers and jewellery makers. The top floor will be a dedicated rehearsal space open to professionals, amateurs and students. To make the best of its location, booths and private balconies facing the water will be available for hire. The ambition is to launch the venue by 2020. £25,000 has been crowdfunded to support a pop-up venue on the site during the summer of 2017.

Sandy Park (0 Miles, 400 seating capacity)
Home to Exeter Chiefs Rugby Club, plans were approved to increase the ground capacity to hold up to 20,600. A redevelopment was undertaken and completed in 2014 with a spend of £10 million which increased the grounds capacity to 12,500. Plans are now in train for further expansion and development, proposing additional event, conference and banqueting capacity with a target completion in 2018.

Exeter Cathedral School – Kalendar Hall (0 Miles from Exeter, 200 Capacity)

Kalendar Hall is the home of Music and Drama departments for Exeter Cathedral school. Most school drama productions are performed in the main hall of this building. In addition to the schools' usage, the main hall is used by various community groups for dance, fitness and music.

The proposal, approved in January 2014 (but which has since lapsed), is for the 1950s hall to be demolished and rebuilt with a 200 seat theatre for school performances and public theatre productions, an office for school staff and 8 music practice rooms for pupils. The hall will have bleacher seating so that it can be closed to form studio teaching space. There would also be two retail units on the ground floor facing on to South Street.

The building will consist of four floors:

1) Lower Ground Floor – two retail units
2) Ground Floor – main theatre space, staff room with technician's office/box office, a small changing room with shower
3) First Floor – upper level of theatre which has a lighting and sound control room. The area can be separated with an acoustic partition to provide a lecture space
4) Second Floor – main teaching classroom, 8 music practice rooms, office for music staff

The site constraints dictate that the theatre must have a main elevation facing South Street. In order to maintain the 'black box' a solid front panel has been designed. This helps to deal with the noise from South Street entering the theatre space, as well as providing thermal mass.

The design includes a wall consisting of a series of overlapping glass boxes. The panel is configured from an apparently random array of boxes that break up the elevation. During the day, the facade appears as a series of white polycarbonate boxes of differing sizes and thicknesses which adds interest to the facade. At night, the facade takes on a different persona, with coloured lights behind the boxes illuminating the facade with a continually changing wash of colour. The lighting system can be linked to what is going on inside the theatre. The arrangement of boxes has been generated from a specific piece of music - the school song. Any piece of music can be used for the front facade and each piece would yield different results. The school song has been used to further increase the building's link to the site, which has been used for musical purposes for many centuries.

Shaftesbury Theatre, Dawlish (13 Miles, 141 seating capacity)

Redevelopment took place to provide wheelchair access in the Theatre. Phase I was undertaken between 1995-2005 and Phase II between 2007-2009 with a total of £200,000 spent. Funding came from grant applications to Lottery Heritage fund, £30,000 from the town council and £15,000 from Ugbrook Environmental. Phase III was completed in 2016 and extended the fly tower 10m above the roof, adding new dressing rooms and offices with a £5 million spend.

Junction 27 of the M5, near Tiverton Services (17 miles)

£200m redevelopment proposed (planning application 2017 end). Plans for a surf lagoon and lifestyle outlet village to include major retail development and a 'Gateway to Devon' attraction that might also offer a new venue with a theatre.

Seaton Gateway, Seaton (24 Miles, 250 seating capacity)

The management team have recently applied for funding and if successful are hopeful to complete a full refurbishment programme including expansion ambitions.

The Brewhouse, Taunton (33 Miles, 350 seating capacity)
In 2005, Arts Council England announced that it would cut regular funding to The Brewhouse from 2006, following a drop in artistic output. In 2009, ongoing under-funding, combined with the impact of the recession and a subsequent threat of cuts meant the venue was once again in danger of closure. With support from its stakeholders, The Brewhouse overcame these immediate funding concerns and in March 2010 it was announced that the organisation had been awarded £487,500 from Arts Council England's Sustain fund to allow it to continue to programme arts and participatory activities during the economic downturn. After entering administration in 2013 it re-opened a year later in 2014. A feasibility study by ArtsService recommends the current site be expanded to create a 600 to 750 seat auditorium, a larger gallery space and arthouse cinema with improved bar and catering provision as part of a new 'Coal Orchard' – Taunton's cultural quarter. In 2015 The Brewhouse launched Lights-Camera-Action crowd-funding campaign to raise money to install a new cinema at The Brewhouse.

Hardy Theatre - Dorchester Maltings (60 Miles, 450 seating capacity)
The Dorchester Arts and Maltings Arts, a charitable body are proposing a £8.75 million plan to repurpose an old brewery building. The creation of their new plans has been supported by the Dorchester Town Council, West Dorset District Council and the Duchy of Cornwall. The proposals for the centre include the 450 seat "Hardy Theatre" with a flexible main auditorium, a 130-capacity studio and a cafe-bar, as well as offices and backstage facilities. It will house a Mash Tun studio, Dorset visual arts gallery, arts and crafts studios, Dorchester dance and ballet club, studio bar and arts book shop. It is hoped to be used for amateur and professional national touring repertory theatres, music, dance and comedy, schools use, public and private sector conferencing. For instance, the Dorchester Youth Theatre (DYT) are regular users of the Corn Exchange but welcome the opportunity to perform in a purpose-built venue. The corn exchange doesn't provide sufficient storage space for set and props and doesn't have a backstage area – limiting the types of production that can be put on. In the past Dorchester Youth Theatre have worked with a professional touring company, Angel Exit, and have also performed at Poole Lighthouse, Theatre Royal Plymouth and were in the final ten companies selected from hundreds across the UK, to perform at the National Theatre in London as part of its Connections Festival in 2013. The plans incorporate commercial activities to provide an income stream for the venue and make it largely self-sufficient, including a large open-air screen (cinema) on the square. The project and aims to be completed by 2020.

Bristol Old Vic (81 Miles, 450 seating capacity)
The Bristol Old Vic was rebuilt in 1970-72. In 2009 a plan was developed to raise £25,000,000 to fully refurbish the theatre; the first phase of works (£19m) of rebuilding the Georgian auditorium was completed in 2012 to award-winning acclaim. This included increasing seating capacity and providing up to ten flexible performance spaces. Besides the main Theatre Royal auditorium, the complex includes the Studio theatre and the Side Stage, Paint Shop, rehearsal room and Basement performance areas. A fundraising campaign for the planned refurbishment was assisted by appearances from, among others, Richard Briers, Stephanie Cole, Judi Dench, Prunella Scales, Patrick Stewart and Timothy West. £5.3 million was provided by the Arts Council. Tom Morris has cited as inspiration the Théâtre des Bouffes du Nord in Paris. The main auditorium gained an optional thrust stage, and an increase in seating to 540. The Side Stage area was redeveloped, with additional capacity of 250, creating the option of a separate second auditorium. Plans are being developed to complete the 2009 proposals.

Colston Hall (81 Miles, 2,075 seating capacity)
£45 million renovation starting 2018-2020. The transformation will form Phase Two of Bristol's biggest ever redevelopment programme in the arts sector. The first stage involved the construction of the £20 million foyer space, which opened in 2009. Phase Two is planned to start in 2018 – the Hall's 150th anniversary – and be completed by 2020. In September 2014, Colston Hall launched the 'Thank You for the Music appeal', which set a target to raise £45m to transform the hall into an international standard concert facility and a National Centre for Entertainment, Education and Enterprise across the arts – music, comedy, theatre, dance and the visual arts. So far, over £30m has been raised, including £10m from Bristol City Council, £5m from HM Treasury, £10m from Arts Council England (the largest single capital award made by ACE in the South West), and most recently in November 2016, £4.75m from the Heritage Lottery Fund. As part of the redevelopment, the Trust is also aiming to set new standards for music accessibility, creating the UK's first National Centre for Advanced Training for young musicians with special educational needs and disabilities (SEND). A third venue will be built in the cellars, alongside world-class education spaces for young people. The entire venue will also be made fully accessible for audiences, performers and staff. Plans for the transformation of Colston Hall can be viewed online and a public consultation survey was open until Friday 24 February 2017.

O2 Academy Bristol (81 Miles, 2,000 seating capacity)
Partial demolition of the former Bristol Entertainment Centre with redevelopment above the O2 Academy (to be retained) to provide 442 student bedrooms, internal courtyard, extension at the ground floor to accommodate a cafe, change of use of the existing car park to leisure use, external alterations to the existing O2 Academy and improvements to the adjoining public footpath (including landscaping).

Hall for Cornwall (87 Miles, 969 seating capacity)
The Hall for Cornwall has plans to increase capacity to 1,262 with a spend of £19.8 million. The ambition is that the project will mean the venue is the choice for producers and practitioners who wish to showcase excellent work in Cornwall and the South West. It received £5 million from Arts Council England in 2016. It is expected that work will not get underway until mid to late 2017, with construction anticipated to take 18 months. The Hall for Cornwall (HfC) intends to redesign the auditorium with the addition of 250 seats and build a new entrance, cafes and bars. The venue has been breaking even financially and needs to expand to sustain itself over the longer-term. An increase in size from 965 seats to 1,262 seats could increase annual audiences from 180,000 to 200,000 and annual profits by about £450,000, according to a report prepared by Cornwall Council, which owns the Grade II* building. The report states HfC has 'essentially been running a break-even, subsidised business model' and needs to increase annual profits by at least £400,000 'to be resilient and competitive with venues in Bristol and Plymouth'. Cornwall Council said HfC employs 90 staff and generates more than £16m per annum for the Cornish economy. The redevelopment is planned to start in late 2017 and the venue would be closed for up to 15 months for construction work. Hall for Cornwall must raise £18.3 million to complete the project, which it is hoped will be funded through a combination of public and private sources. It is thought that the theatre will also change its name as part of the process. £2million was awarded from central government in March 2016 and planning permission has also now been secured, following an extensive public consultation earlier this year. In August, initial support was granted from the Heritage Lottery Fund (HLF) for the Revealing City Hall: One Building. The HLF project is a significant part of the proposed redevelopment which, alongside a new theatre auditorium and an ERDF funded QuayWorks creative business hub, will aim to conserve and reinvigorate the Grade II City Hall site, unveiling its 350-year history through an activity programme that will reveal previously untold stories of the building, the surrounding Truro area, its people and communities.

5 UK Theatres & Operators

5.1 UK Theatre / Arts Centres (+1,000 seats)

Presented below are the auditoria of principally 'presenting theatres' with a capacity of over 1,000 seats across the UK. Note, these have been ordered alphabetically by region. This is provided as it was part of the scope of works and it offers a simple method of comparing Exeter with other national locations.

Figure 24: Auditoria of Principally Presenting Theatres with a Capacity of over 1,000 Seats, UK

Venue	Operator	City	County	Region	Capacity (Seated)	Population within 30km (approx. 30mins travel-time)
Derngate Theatre	Northampton Theatres Trust Ltd	Northampton	Northamptonshire	East Midlands	1,200	913,531
Theatre Royal Nottingham	Nottingham City Council	Nottingham	Nottinghamshire	East Midlands	1,186	1,667,350
Norwich Theatre Royal	Norwich Theatre Royal	Norwich	Norfolk	East of England	1,308	568,505
New Wimbledon Theatre	Ambassadors Theatre Group	London	Greater London	Greater London	1,670	8,273,472
Sunderland Empire	Ambassadors Theatre Group	Sunderland	Tyne and Wear	North East	2,000	1,623,382
Manchester Opera House	Ambassadors Theatre Group	Manchester	Greater Manchester	North West	1,920	3,305,797
Manchester Palace Theatre	Ambassadors Theatre Group	Manchester	Greater Manchester	North West	1,955	3,305,797
Liverpool Empire	Ambassadors Theatre Group	Liverpool	Merseyside	North West	2,350	2,132,962
Grand Opera House Belfast	Grand Opera House Belfast	Belfast	Belfast	Northern Ireland	1,063	873,589
His Majesty's Theatre	His Majesty's Theatre	Aberdeen	Aberdeen	Scotland	1,470	315,551
King's Theatre	Festival City Theatres Trust	Edinburgh	Edinburgh	Scotland	1,350	1,005,971
Festival Theatre Edinburgh	Festival City Theatres Trust	Edinburgh	Edinburgh	Scotland	1,915	1,005,971
Edinburgh Playhouse	Ambassadors Theatre Group	Edinburgh	Edinburgh	Scotland	3,059	1,005,971
Glasgow Theatre Royal	Ambassadors Theatre Group	Glasgow	Glasgow	Scotland	1,541	1,704,375
Glasgow King's Theatre	Ambassadors Theatre Group	Glasgow	Glasgow	Scotland	1,785	1,704,375
Aylesbury Waterside Theatre	Ambassadors Theatre Group	Aylesbury	Buckinghamshire	South East	1,200	1,252,350
Milton Keynes Theatre	Ambassadors Theatre Group	Milton Keynes	Buckinghamshire	South East	1,400	1,205,024
Mayflower Theatre	Mayflower Theatre	Southampton	Hampshire	South East	2,300	1,247,257
Main House Marlowe	Marlowe Theatre	Canterbury	Kent	South East	1,200	641,322

Venue	Operator	City	County	Region	Capacity (Seated)	Population within 30km (approx. 30mins travel-time)
Oxford New Theatre	Ambassadors Theatre Group	Oxford	Oxfordshire	South East	1,800	688,187
New Victoria Theatre Woking	Ambassadors Theatre Group	Woking	Surrey	South East	1,300	2,997,282
Bristol Hippodrome	Ambassadors Theatre Group	Bristol	Bristol	South West	1,951	1,221,013
Theatre Royal Plymouth	Theatre Royal Plymouth	Plymouth	Devon	South West	1,320	380,031
Princess Theatre Torquay	Ambassadors Theatre Group	Torquay	Devon	South West	1,491	450,919
Venue Cymru	Venue Cymru	Llandudno	Clwyd	Wales	1,450	85,857
New Theatre Cardiff	St. David's Hall & New Theatre Cardiff	Cardiff	South Glamorgan	Wales	1,144	1,300,213
Donald Gordon Theatre	Wales Millennium Centre	Cardiff	South Glamorgan	Wales	1,900	1,297,685
Theatre Royal Newcastle	Theatre Royal Newcastle	Newcastle	Staffordshire	West Midlands	1,294	1,545,800
Stoke Regent Theatre	Ambassadors Theatre Group	Stoke-on-Trent	Staffordshire	West Midlands	1,600	942,256
Birmingham New Alexandra	Ambassadors Theatre Group	Birmingham	West Midlands	West Midlands	1,347	3,335,831
Main House Birmingham Hippodrome	Birmingham Hippodrome	Birmingham	West Midlands	West Midlands	1,850	3,335,831
Wolverhampton Grand Theatre	Wolverhampton Grand Theatre	Wolverhampton	West Midlands	West Midlands	1,200	2,722,231
Hull New Theatre	Hull New Theatre	Hull	East Riding of Yorkshire	Yorkshire and the Humber	1,159	662,303
Lyceum	Sheffield Theatres Trust Ltd	Sheffield	South Yorkshire	Yorkshire and the Humber	1,068	1,796,831
Main House (Alhambra)	Bradford Theatres	Bradford	West Yorkshire	Yorkshire and the Humber	1,456	2,202,558
Leeds Grand Theatre & Opera House Ltd	Leeds Grand Theatre & Opera House Ltd	Leeds	West Yorkshire	Yorkshire and the Humber	1,550	2,074,803

Source: UK Theatre venue ticket sales benchmarking analysis, UK Theatre, November 2015

5.2 National (UK) Theatre Operators

Theatres across the UK are operated by a range of different organisations – some directly managed by the public sector, many by charitable trusts and some by the private sector. The majority are independently managed, with an increasing number of those publicly owned being transferred and operated by third parties.

A brief summary is presented below of three notable theatre operators trading in the UK, each of which has multiple venues within their portfolio as well as venues within the south west (as listed). This background information provides some insights into how the theatre economy functions and possible barriers to entry. We are not recommending the operations of any venue is outsourced or that partners are found, though of course this may be considered as part of future appraisals.

5.2.1 BH Live

- Leisure and event operator and social enterprise based in Bournemouth
- Total income in 2015/16 of £27.4m of which £7.8m was generated through BH Enterprises trading activities
- Portfolio includes venues across Dorset, Hampshire, Oxfordshire, Kent and London
- Business includes its own ticketing platform: bhlivetickets
- Originated from its operation of the Bournemouth International Centre (BIC), home to four events halls, and the Bournemouth Pavilion – primarily for theatre
- Staged 113 shows at the Bournemouth International Centre and 310 at the Bournemouth Pavilion with 530,000 tickets sold through bhlivetickets
- Bournemouth International Centre was renovated in 2004 and Bournemouth Pavilion was refurbished in 2007.

Venue	Location	Seated Capacity	Show Type
Windsor Hall	BIC	4,012	Dance, Concert, Musicals, Comedy, Music, Exhibition
Purbeck Hall	BIC	1,700	Combined outdoor events and exhibitions
Solent Hall	BIC	1,300	Concert, Exhibition
Tregonwell Hall	BIC	1,100	Conference, Exhibition
Bournemouth Pavilion	Bournemouth Pavilion	1,458	Theatre, Conference hall, Musicals, Dance, Pantomime, Concerts, Music, Comedy

5.2.2 Ambassador Theatre Group (ATG)

- ATG owns and operates a total of 46 venues of which 25 are located in the UK and the remainder in the USA and Australia
- Global turnover of £185m in 2015 (including share of co-production)
- Business has its own theatre ticket platform: ATG Tickets.
- ATG's production activities expanded with the launch of Theatre Royal Brighton Productions and the formation of producing partnerships with award-winning directors Jerry Mitchell and Jamie Lloyd in 2011 and 2012.
- In 2011, ATG TheatreCard, the UK's largest paid-for theatre membership scheme was launched.
- ATG has invested more than £3 million from 2012-14 on VIP lounges and bars at its theatres.

Venue	Location	Seated Capacity	Show Type
Princess Theatre	Torquay	1,431	Theatre, Musicals, Opera, Ballet, Comedy, Concert
Bristol Hippodrome	Bristol	1,951	Theatre, Musicals, Ballet, Concert, Pantomime

5.2.3 HQ Theatres

- HQ Theatres and hospitality is a UK operator of regional theatres, restaurants and other cultural venues.
- HQ Theatres and Hospitality Ltd has various subsidiaries including (t/o for YE 2016): HQ Hospitality Ltd – catering services (t/o £10m); HQ Theatres Ltd – Theatre Management (t/o £1.5m); ten individual theatre operating subsidiaries and HQ Theatres Trust – charitable company (t/o £800k).
- Operates 12 cultural and theatre venues in the UK with two in the South West:
  - Wyvern Theatre, Swindon (t/o £2.7m YE 2016)
  - Swindon Arts Centre, Swindon

5.3 Broadcasting Theatres

Summarised below are two notable 'broadcasting theatres'.

Broadcasting theatres are those that formulate stage productions in-house and relay them to cinemas, theatres and event venues worldwide. They aim to give a cinematic experience for popular theatre productions and performances by top award-winning actors in the theatre industry.

There has been much debate as to whether broadcasting theatres act as a complement or substitute to local theatres, with research from Nesta in 2014 reporting that sales of theatre tickets among people with access to NT Live rose by 6.4% per year and had no negative impact on regional theatre ticket sales outside of London. Other research suggests that live broadcasts can impact the repertoire of local theatre, as attendance to live broadcasts of a play may mean that local production of the same play is not then attended and thus cancelled or not pursued.

We have included this in our research because it represents both an opportunity for a new venue, but also, potentially a threat which already influences the theatre market.

5.3.1 Royal Shakespeare Company (RSC)

The RSC is a British theatre company based in Stratford-upon-Avon, England. Live Theatre takes place in Stratford-upon-Avon and is broadcasted to a range of venues across the UK. Every year at least one production goes on tour to schools and theatres and live screenings of all shows are broadcasted to cinemas and theatres across the UK as and when they are staged. The following table shows a list of venues and their proximity to Exeter that the RSC broadcasts live theatre to.

Figure 25. RSC Broadcast Venues

Venue	Location	From Exeter (miles)
Exeter Picturehouse	Exeter	0
Scott Cinemas	Exmouth	8.8
Pavilions Teignmouth	Teignmouth	12.2
Scott Cinemas	Sidmouth	13.3
Vue Cinemas	Torbay	17.6
Central Cinema	Torquay	19.7
The Gateway Seaton	Seaton	20.4
New Carlton Cinema	Okehampton	20.5
The Watermark	Ivybridge	28.4
Odeon	Taunton	28.6
The Brewhouse Theatre and Arts Centre	Taunton	28.6
The Plough Arts Centre	Great Torrington	30.9
Merlin Cinemas, Kings	Kingsbridge	31.8
Scott Cinemas	Barnstaple	33.7
Electric Palace Bridport	Bridport	34
Vue Cinemas	Plymouth	35.6
The Mcmillan Theatre	Bridgwater	37.3
Landmark Theatre	Ilfracombe	42.3
Embassy	Ilfracombe	42.3
North Devon Theatre	Ilfracombe	42.3
Cineworld	Yeovil	42.5
Odeon	Weston Super Mare	49.6
Strode Theatre	Wells	51.1
Wells Film Centre	Wells	51.1
Curzon cinema & arts	Clevedon	57.6
The regal Cinema	Wadebridge	58.7
Vue Cinemas	Bristol	66
Scott Cinemas	Bristol	66
Everyman	Bristol	66
Cineworld	Bristol	66
Odeon	Bristol	66
Vue Cinemas	Bristol	66
Showcase	Bristol	66

5.3.2 National Theatre Live (NT Live)

National Theatre Live (NT Live) broadcasts performances of stage productions to cinemas, venues and art centres all over the world. The first broadcast was of Phèdre in June 2009 was seen by more than 50,000 people. With close-ups and camera movement, it is marketed as ‘a cinematic take on the theatre experience’. The following table shows recommended venues suggested by NT Live’s website when searching for venues close to Exeter that offer broadcasted screenings of NT Live stage productions.

Figure 26. NT Live Venues Close to Exeter which offer broadcasted screenings

Venue	Type	Location	From Exeter (miles)
Exeter Picturehouse	Cinema	Exeter	0
Exeter Vue	Cinema	Exeter	0
Exeter Odeon	Cinema	Exeter	0

Venue	Type	Location	From Exeter (miles)
Pavilions Teignmouth	Theatre, Cinema, Comedy, Music, Dance	Teignmouth	12
Scott Cinemas - The Radway Cinema	Cinema	Sidmouth	13
Tivoli Cinema Tiverton	Cinema	Tiverton	13
Scott Cinemas Exmouth	Cinema	Newton Abbot	13.5
Central Cinema	Cinema	Torquay	17.5
Torbay Vue	Cinema	Torbay	19.5
The Barn Cinema	Cinema	Totnes	20
New Carlton Cinema	Cinema	Okehampton	20.5
The Gateway	Theatre	Seaton	20.5
Wellesley Cinema	Cinema	Wellington	22
Flavel Arts Centre	Cinema, Music, Concert, Comedy	Dartmouth	25.5
The Brewhouse Theatre & Arts Centre	Theatre, Arts Centre	Taunton	28
The Watermark	Cinema, Theatre, Music, Musical, Concert, Comedy, Spoken Word	Ivybridge	28.5
Taunton Odeon	Cinema	Taunton	29
Tavistock Wharf	Theatre, Cinema, Art Gallery, Live Music	Tavistock	29.5
The Plough Arts Centre	Theatre, Cinema, Art Gallery	Great Torrington	31
Kings Kingsbridge	Cinema	Kingsbridge	31.5
Scott Cinemas - The Central Cinema	Cinema	Barnstaple	34
Electric Palace	Theatre	Bridport	34.5
Plymouth Vue	Cinema	Plymouth	35.5
Plymouth Arts Centre	Contemporary art, independent cinema	Plymouth	36
The McMilan Theatre	Theatre	Bridgwater	37

6 Venue Case Studies

This section highlights a number of case studies, derived from the *Advisory Group's recommendations* and the study research, which provide comparable benchmarks for a potential new venue in Exeter.

The information covered by these case studies includes: programme offer, food and beverage facilities, flexibility, quality of acoustics and cost / funding. This provides some examples of functioning facilities which will help to translate the theoretical discussions about a venue into observable examples which can inform future thinking and decisions. Figure 27 provides a summary of the case studies for which a more detailed description of each case study can be found below.

Figure 27 Summary of Case Studies

Theatre Name	Seating	Drama	Concert/ Music	Stand-up Comedy	Children's show	Dance	Pantomime	Musical	Opera	Café/Bar/Restaurant	Flexibility	Acoustics	Cost/Funding
The Apex	500	✓	✓	✓	✓	✓	✓	✗	✓	C	✓	✓	£18.6m, St Edmundsbury Borough Council
The Coliseum	550	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓	✗	£21m, £7.1m from ACE
The Marlowe	1,200	✓	✓	✓	✗	✓	✗	✓	✓	R	✓	✗	£25.6m (2008 values), £17m from Canterbury City Council, £4.2m from fundraising campaign
Kings Place	415	✓	✓	✓	✓	✓	✗	✓	✓	✗	✗	✓	Venue is integrated within £100m property development. Lease of venue gifted by property developer Peter Millican for 99yr lease for peppercorn rent.
Storyhouse Chester	800	✓	✓	✗	✗	✗	✗	✓	✓	CBR	✓	✗	£37m, £32.5m from Cheshire West and Chester council, £3m capital funding grant from ACE, £600,000 from MBNA, £1m from trust and foundations
The Dome	1,200	✓	✓	✓	✗	✗	✗	✗	✗	B	✗	✓	Owners Jenny Davies and Sean Finnerty, total cost unknown but £45K from crowdfunding website
Tregonwell Hall, BIC	1,000	✗	✗	✗	✗	✗	✗	✗	✗	CB	✓	✗	BIC – £22m expansion and redevelopment in 2003; co-funded by the South West Regional Development Agency
Wales Millennium Centre	1,900	✗	✗	✓	✓	✓	✗	✓	✓	CBR	✗	✓	£124.2m, £31.7m Lottery funding, £37m National Assembly for Wales, £10.4m by Arts Council Wales, £10m donation by Donald Gordon, £13.5m loan from HSBC, remaining funding from sponsorship deal with Principally Building Society

Theatre Name	Seating	Drama	Concert/ Music	Stand-up Comedy	Children's show	Dance	Pantomime	Musical	Opera	Café/Bar/Restaurant	Flexibility	Acoustics	Cost/Funding
Warwick Arts Centre	1,200	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	£6.9m, £5.65m from University of Warwick through a number of major trusts and foundations, £1.25m from public fundraising
Snape Maltings	832	✓	✓	✓	✓	✓	✗	✗	✓	BR	✗	✓	£14m investment from Aldeburgh Music
Saffron Hall	740	✓	✓	✗	✗	✓	✗	✗	✗	✗	✗	✓	£10m, £9m from local charity donor
The Royal and Derngate	1,200	✓	✓	✓	✓	✓	✗	✗	✓	✗	✓	✗	£14.5m, £1.6 from HLF, £2.6 from East Midlands Development agency and Northampton Partnership, £1m from partnership funding by the theatre's development team
Gordon Craig Theatre	501, 1,200	✓	✓	✓	✓	✓	✓	✓	✗	BR	✓	✓	Funding from Stevenage Borough Council, West Gate Stevenage
Cambridge Corn Exchange	1,849	✗	✓	✓	✓	✓	✗	✓	✗	B	✗	✗	Grant aided by ACE, Eastern Arts Board, Eastern Orchestral Board and New Audiences Fund, Cambridge City Council
Birmingham Symphony Hall	2,262	✗	✓	✓	✗	✓	✗	✓	✗	CB	✓	✓	£30m European funding as part of the ICC, plans for a £10m extension as part of the Government's Midlands Engine Strategy

The Apex, Bury		
		500 Seating, 750 Standing It is well known for a diverse programme of live music and events; ➢ Drama ➢ Concert/Music ➢ Stand-up Comedy ➢ Children's Show ➢ Opera ➢ Dance ➢ Pantomime The "Fat Cat Comedy Club" which moved from the Corn Exchange and has been sold out since moving to the Apex
Facilities	The foyer of the building serves as an extension to the new public square at the centre of the Arc development, with the Auditorium articulated as a freestanding crafted brick box within the overall building block. Dressing and changing facilities are provided for performers, a finishing kitchen and bars serve events, and a conference room and green rooms (with dance floor) provide a range of uses that are helping to establish the Apex as a vital hub of local cultural activities. The Gallery, based on the first floor holds a range of regularly-changing exhibitions featuring works by emerging and established artists, as well as engaging with West Suffolk's various art groups and offering an opportunity to schools and the wider community to display work in a professional environment. All works are for sale, unless otherwise stated. Sodexo Prestige operates Aspretto, a 24 seat, ethically focused café in the Apex in Bury St Edmunds, as part of the caterer's £7m contract with the St Edmundsbury Collection. Sodexo Prestige invested around £40,000 in the café as part of the seven-year deal with St Edmundsbury Borough Council to provide hospitality and catering at the Apex, the Athenaeum and Abbey Gardens. Event catering at Moyse's Hall Museum is also included in the agreement.	
Flexibility	The Auditorium includes seating on two balcony levels and, at ground floor, the orchestra pit lifts permitting a number of performance arrangements to be realised. Ground floor seating is fixed to floating air-bearing wagons to facilitate rearrangement, and may be transferred to the basement, via the orchestra pit lift, for storage when not required. The envisaged arrangements include raked theatre-style seating, sunken 'promenade' floor, flat floor, and 'in-the-round' (raked seating on top of the flat floor). Technical gallery functions are accommodated out of sight, within the roof-space.	
Acoustics	The treatment of the bricks allows for an enhanced sound quality. The solidity of the thick white oak fronts minimizes undesirable audible resonance. Doubly-curved panels are laminated from solid timber, their geometry and horizontal slots helping to control reflections. Slotted panels at the eaves provide acoustic absorption where reflections might combine detrimentally. Ground floor boarding and soffit boarding in the Auditorium are fixed to plywood substrates that are resiliently supported to beneficially absorb low frequencies.	
Cost/ Financial	With a value of £18.6million, the cost of the building almost doubled since it was first being planned by St Edmundsbury Borough Council. The Apex opened in 2011 and is part of the Arc Shopping Centre development.	

The Coliseum, Oldham		
		524 Seating, 3 levels It is a regular producing theatre, offering the following show types from in house and touring productions; ➢ Drama ➢ Concert/Music ➢ Musical ➢ Stand-up Comedy ➢ Children's Show ➢ Dance ➢ Pantomime The theatre produces a new festive production each year attracting audiences of over 35,000 from across the North West of England, as well as further afield
Facilities	Oldham Coliseum Theatre's Main House has a classic proscenium arch stage with a permanent fore stage and a fly tower. The theatre also has a Studio with a more intimate capacity of 50 seats and has 5 dressing rooms (total capacity 20).	
Flexibility	The orchestra pit is located underneath the fore stage but seats need to be removed to accommodate it.	
Refurbishment	The Coliseum was recently renovated in 2012 at a cost of £2million. It received almost £21,000 for new lighting and sound equipment from a charitable company set up by Viridor - Greater Manchester's waste and recycling service, and 10 per cent was donated by Oldham engineering firm Pilgrim International, a long-time supporter of the theatre. The refurbishment included a new bar, two education studios and a central heating system. This refurbishment extended the building's lifespan by 10 years. Without refurbishment, the alternative would have been to close the building down entirely in 2012 until a new site was found – this would have left Oldham without a professional theatre and live entertainment venue. The theatre now plans to move to a new site in the "cultural quarter" by 2020 allowing for better connections to peer organisations like the Oldham gallery, heritage and arts centre and the library. Proposals for the centre have been drawn up by Oldham Coliseum Theatre in conjunction with Oldham Council and have been submitted for planning permission. The new theatre will have a 550 seat main auditorium and a 175 seat flexible studio which would become the new home for the Coliseum productions. It is also hoped the Coliseum's current building will remain open as a music venue or a restaurant, possibly in affiliation with the new arts centre. A bid was made for £4 million from the Heritage Lottery Fund, with a separate bid made to Arts Council England for £5 million. Through Oldham Council, the Coliseum has been approved a grant of £7.1m from Arts Council England. The new £25m Oldham Coliseum Theatre will be a dynamic cultural hub for the whole community and home to a rich and varied artistic programme. It will provide exceptional professional theatre production and a forum for people to create and learn together. Aiming to be a major driver in the economic and social regeneration of Oldham, providing a public space accessible to all.	

The Marlowe, Kent		
		Reopened in 2011 after an extensive rebuild. 1,200 seats ➢ Drama ➢ Music/Concert ➢ Musical ➢ Stand-up Comedy ➢ Opera ➢ Dance Visits from NT, RSC, Glyndebourne Touring Opera, Matthew Bourne's New Adventures and the Philharmonia Orchestra
Facilities	Located on the first floor of the theatre, The Marlowe Studio is the second auditorium, and plays host to a wide range of performances, gigs, workshops and other events. The Studio is a place for some of the most exciting and adventurous theatre, comedy and music being produced in Britain today. A highly flexible and adaptable space, with a capacity of between 150 on a retractable seating bank, and 300 for a standing event, the studio can also be set out cabaret style, with round tables and chairs. Facing the River Stour is the Green Room restaurant, which offers informal dining with locally sourced food. In addition, there is a bar on each of the three floors, giving the audience the opportunity for pre-show or interval drinks.	
Cost	£25.6m (2008 values), £17m from Canterbury City Council, £4.2m from fundraising campaign	

Kings Place, London		
	2 concert halls, 415 seating 2 galleries Commercial office space ➢ Drama ➢ Music/Concert ➢ Children's Show ➢ Musical ➢ Stand-up Comedy ➢ Opera ➢ Dance Visits from NT, RSC, Glyndebourne Touring Opera, Matthew Bourne's New Adventures and the Philharmonia Orchestra	
Facilities	Waterfront restaurant, café and bar Kings Place has two major spaces designed specifically for the display of visual arts, Pangolin London and Kings Place Gallery. Both galleries required state-of-the-art environmental specification (i.e. temperature control, lighting) as well as the flexibility in load bearing and display systems to facilitate regularly changing displays and touring exhibitions. All seven levels above ground floor at Kings Place are commercial office space. Each floor is designed so that companies occupying the offices can bring together as many people as they can on one level, with the aim to promoting staff interaction in a more creative environment. Kings Place has exceptionally large floor areas, with good access to external and internal vistas and natural light.	
Hall 1		With 415 fixed seating capacity (302 stalls plus 113 balcony), Hall One is Kings Place's main auditorium and is suitable for concerts, talks, screenings, recording & broadcasting. Hall One is both classic and elegant as a music room and can provide the 21st century live music experience which often involves visual and sound effects. The equipment for this is all hidden away in an attic above the hall, but can then be discretely dropped into position when needed through traps in the ceiling. The seats in the hall were sourced from Italy and were fully tested in an acoustics laboratory. The design was then developed as a result of the tests to make sure the seats absorbed the right amount of sound.
Hall 2		Hall Two has a 250 standing, 200 theatre - and 84 cabaret-style capacity. It is used for rehearsal, education, small performances and for the resident orchestras to experiment and develop new compositions. As a result, the hall had to be a very flexible design, not just physically, but acoustically. The architectural form is visually simple but has panels and materials which scatter and absorb just enough of the sound to provide a very neutral acoustic, suitable for the anticipated broad variety of events.

Acoustics	The Kings Place building is positioned right next to King's Cross, a major transport hub. This meant the challenge of keeping out noise from trains and traffic. For music playing, quiet is incredibly important since it allows the players and audience to hear all the detail of the music and the last note fading into nothing. All of the music spaces are buried in the basement of the building, away from the street noise. The recital hall itself is supported on rubber pads, leaving it floating within the building, to completely protect it from unwanted noise. As a building full of music making, Arup Acoustics also had to design the rehearsal and practice rooms so that the amplified jazz band in one room did not disturb the lute ensemble in the next room. This was achieved by constructing each music space as a separate box within the main building and using specific materials including timber panels and doors which are exceptionally heavy and at least 50mm thick solid wood. Visitors in the foyer can see into the rooms through large deeply glazed windows.
Cost	The entire development cost c.£100m. The arts venues were subsequently gifted by property developer Peter Millican to the Kings Place foundation on a 99yr lease for a peppercorn rent.

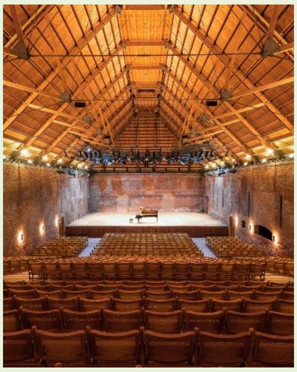
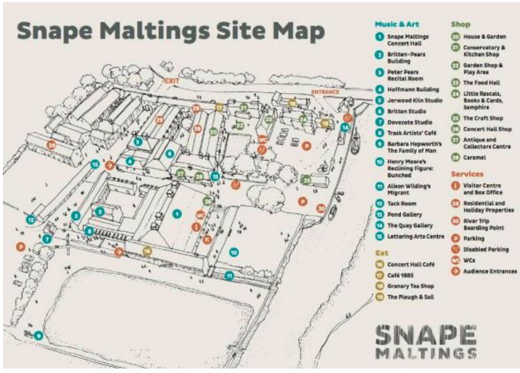
Storyhouse, Chester		
		It includes two theatres (800 seat and 150 seat), a cinema, library, restaurant and two bars. ➢ Drama ➢ Music/Concert ➢ Musical ➢ Opera
Stage 1	The larger theatre is an 800-seat "proscenium arch" stage. With state-of-the-art facilities, its auditorium spreads across three tiers: stalls, circle and gallery. This same theatre converts into a 500-seat "thrust" stage. In this format, the auditorium spreads across two tiers – circle and gallery – with new pit seating putting the audience right in amongst the action.	
Stage 2	On top of the building sits the Studio theatre. This 150-seat "black-box" theatre is a flexible, fully-equipped performance, rehearsal or workshop space. The Studio is designed to be full of work local creative companies, individuals and organisations make. The Studio sits next to a glass-fronted bar with panoramic views across the city.	
Library		The library spreads right through the building, with family-friendly library activity happening across all Storyhouse's spaces. Extensive book-stock covers the walls throughout the old Odeon and a new children's area offers opportunities for wet-play, arts and crafts activity and storytelling. New study areas offer opportunities for studying, learning and research.
Cost	Storyhouse is Chester's new £37 million cultural centre, £32.5m from Cheshire West and Chester council, £3m capital funding grant from ACE, £600,000 from MBNA, £1m from trust and foundations	

The Dome, Grand Central Hall, Liverpool		
		Reopened in 2011 after major refurbishment 1,200 seat venue ➢ Drama ➢ Music/Concert ➢ Stand-up Comedy ➢ Variety Nights
Facilities	The Dome offers theatre-style seating on two levels with 500 fixed circle seats and an option of 700 standing or 500 seating downstairs in the stalls. It has a huge working pipe organ, installed in 1907, which acts as a backdrop behind the main stage. There is a hi-tech lighting and sound system, two bars, catering facilities and an in-house promotions and production team.	
Cost	Owners Jenny Davies and Sean Finnerty, total cost unknown but £45K from crowdfunding website	

Tregonwell Hall, BIC, Bournemouth		
		Reopened in 2011 after major refurbishment 1,100 seat venue Tregonwell Hall Bar provides and extra 80m2 for up to 100 delegates Exhibitions Conferences
Facilities	Sound proof partition walling can separate the 'under balcony' space, providing greater flexibility and additional breakout area as required. A range of high class facilities including quality sound and lighting systems, projection, booths for simultaneous interpretation, an infra-red hearing system, WIFI and RF television distribution outlets are available. More specifically, a Bose PA system surrounds the proscenium arch controlled by a Yamaha LS9 Mixer. The system is mainly designed for speech, making it very suitable for conference presentations. Audio feeds can be routed to control rooms in other halls. Stage lighting is a basic generic lighting rig consisting of CP62 Parcans and a selection of fresnels and profiles. The system is designed to give a basic wash on stage. An ETC Congo Junior Desk controls 66 dimmers. There are two motorised front lighting trusses for easy rigging and de-rigging of equipment. House lights are controlled by DMX. Metal halide floodlighting is also available for exhibitions.	
Cost	BIC – £22m expansion and redevelopment in 2003; co-funded by the South West Regional Development Agency	

Wales Millennium Centre, Cardiff		
		Reopened in 2011 after major refurbishment 1,900 seat lyric theatre 253 seat studio ➢ Musicals ➢ Opera ➢ Dance ➢ Stand-up Comedy ➢ Children's Shows ➢ Circus
Facilities	Bar, restaurant and café	
Construction	The construction of the centre formed part of the of the Cardiff Bay regeneration programme undertaken by Cardiff Bay Development Corporation. The brief was to regenerate and link Cardiff city centre with the waterfront. Separating the design of the structure from the design of the acoustic and architectural enclosures, the team embarked on what was to be a unique building programme, allowing construction from the inside out. This innovative approach allowed for refinements in architectural and acoustic design to take place whilst allowing work on the structural frame to start and indeed finish on time.	
Funding	£124.2m, £31.7m Lottery funding, £37m National Assembly for Wales, £10.4m by Arts Council Wales, £10m donation by Donald Gordon, £13.5m loan from HSBC, remaining funding from sponsorship deal with Principally Building Society	

Warwick Arts Centre, Coventry		
		Reopened in 2009 after a 10 month refurbishment costing £6.9m 1,200 seat music and conference venue run by Warwick Conferences ➢ Drama ➢ Music/Concerts ➢ Opera ➢ Dance ➢ Stand-up Comedy ➢ Children's Shows
Facilities	To ensure that Warwick Conferences could continue to offer its clients a world-class auditorium and concert hall venue fit for the 21st century, the extension and redevelopment project (devised by Architects Design Partnership) has added a host of new features and improvements. Among the enhancements are an improved main entrance, which contrasts with the solidity of the locally-sourced red sandstone of the building – inspired by local landmarks Kenilworth Castle and Sir Basil Spence's Coventry Cathedral. New seating, which is not only more comfortable but offers improved sightlines, combined with improved acoustics (designed by arts specialists and acoustic experts Acoustic Dimensions) and a new beech floor, that seamlessly links with the new beech stage, are also among the changes. In addition to a new rehearsal room and dressing rooms for performers, the new main stage on which they will perform now incorporates four motorised elevators, which can be used to set the level stage apart from the auditorium floor up to a height of 1,400mm. However, perhaps the most dramatic of all the improvements is the open roof space, which is equipped with special new lighting that can create a range of effects that emphasise the scale of the landmark venue.	
Cost	Funding of the redevelopment project was raised in part by The University of Warwick, through the assistance of a number of major trusts and foundations – which contributed around £5.65 million. The remaining £1.25 million of the £6.9 million project came from a public fundraising campaign launched by the singer Lesley Garrett.	

<table>
<tr><th colspan="3">Snape Maltings, Suffolk</th></tr>
<tr><td></td><td></td><td>832 seat venue opened in 1967
Primarily used for concerts, the concert hall is host to Aldeburgh Festival of Music and Arts as well as the Snape Proms
➢ Drama
➢ Music/Concerts
➢ Opera
➢ Dance
➢ Stand-up Comedy
➢ Children’s Shows</td></tr>
<tr><td>Facilities</td><td>

The "Creative Campus" at Snape Maltings has four performance venues (from 70 to 830 capacity) and over 20 rehearsal and public spaces</td><td>These include:
The Hoffman Building – two spaces suitable for performances, various rehearsal rooms, office space and social area.
The Britten Studio (340 seat) designed to have an excellent and flexible acoustic with a high level of sound insulation for recording, ideal for orchestral rehearsals.
The Jerwood Kiln Studio (80 seat). Flexible configuration, is an ideal space for smaller groups to rehearse, and is equipped for video and electro-acoustic installations. The Studio retains the double-height roof and much of the existing fabric of the original kiln structure
The Britten-Pears Building – houses the Peter Pears Recital Room (112 seat theatre style), Holst Library and rehearsal rooms.</td></tr>
<tr><td>Cost</td><td colspan="2">In 2006 Alderburgh Music purchased the lease of Snape Maltings Concert Hall and invested £14m in new studios and rehearsal spaces which came into use in 2009.</td></tr>
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Saffron Hall, Saffron Walden		
		740 seat concert hall with retractable seating, built on the ground of Saffron Walden Country High School The venue houses the independently run Saffron Screen ➢ Drama ➢ Music/Concerts ➢ Dance ➢ Opera Resident Orchestra: Britten Sinfonia Other Artists: London Philharmonic Orchestra, Maxim Vengerox, Penguin Café, Nicola Benedetti, Courtney Pine and the Sixteen
Facilities	Café and bar facilities and parking for 400 cars.	
Flexibility	Either side of the stage area are curtains and panels which can be moved into position to make a theatre stage	
Acoustics	The entire Hall is wood-lined, and although nominally rectangular, it's not a shoebox. It is more square than the longer hall designs that are more common for new halls, and many of the sides and corners – around the back of the stage and the back of the auditorium, are offset to give a more rounded feel. The acoustic gives the orchestral sound just the right amount of space, a resonance with an enriching but never distracting warmth. The primary virtue is how natural the hall allows the orchestra to sound. It isn't one of those venues that draws attention to itself with a signature sound; the performers always come first. The Moving wooden ceiling panels allow the acoustics to be adjusted to suit a particular event – drama, choral or orchestral - a total of 15 separate acoustic states can be supported.	
Cost	The £10m venue is believed to be the largest private direct donation to a British state school where 90% of this was a gift from an anonymous local donor with a passion for music through local charity, The Yellow Car Charitable Trust	

The Royal and Derngate Theatre, Northampton		
		The Royal Theatre, 583 seats The Derngate, 1,200 seat multipurpose space ➢ Drama ➢ Stand-up Comedy ➢ Opera ➢ Children's Shows ➢ Music/Concert ➢ Dance ➢ Musicals
Facilities	It also has an underground space used for community and family focused work. The venue houses a youth theatre and hosts various different types of performances. It has won a number of awards including being shortlisted for the 2016 Regional Theatre of the Year Award. There is a double purchase counterweight set for flying and acoustic ceiling reflectors as well as state of the art lighting techniques which allow the colour of the interior to be changed	
Flexibility	The venue has 3 main formats: ➢ Concert (For seated Classical / Pop / Rock concerts) ➢ Lyric (Theatre style with proscenium arch) ➢ Standing (Litedeck stage – 12m Wide x 9.7m Deep x 1m High) Note: There is a reduced capacity version of the Lyric format which has the upper circle draped off using custom supplied standard black serge cloth. This format can be used to create a more intimate space and reduces the seating capacity by around 305 seats (exact number is dependent on seat holds applied). This format prevents use of follow-spots due to their position at the rear of the upper circle. Rows A to D have to be removed to be able to use the orchestra pit.	
Cost	The Royal Theatre and the Derngate Theatre were originally two entities that became a combined organisation run by the Northampton Theatres Trust in 1999. In 2005, both theatres closed for an 18-month redevelopment. The total cost, £14.5 million, was received from various outlets, including £1.6m from the Heritage Lottery Fund, £2.6m from the East Midlands Development Agency and Northampton Partnernship and almost £1m from partnership funding by the theatres' development team. The redevelopment merged and totally refurbished both venues. Moreover, it has now developed a charity to provide not-for-profit management services whilst also establishing another charity to operate the Corby Cube theatre in Corby	

Gordon Craig Theatre, Stevenage		
		501 Seat Theatre 1,200 Seat concert hall ➢ Drama ➢ Stand-up Comedy ➢ Pantomime ➢ Children's Shows ➢ Music/Concert ➢ Dance ➢ Musicals In house production since 2011, producing large scale musicals and plays every year
Facilities	Being situated in a Leisure centre, it is a huge rectangular building with flat roof, covered with very large cream tiles. Relief is provided by thin blue and yellow horizontal bands round the building and by two grey towers each a third of the way down, one the theatre fly tower and the other containing the ventilation system for the building. The theatre has a proscenium arch, flat floor, thrust stage and a black harlequin cascade dance floor. Further to this the Orchestral pit accommodates a maximum of 20 musicians. The theatre is also notable for the popular and playable 1932 Christie Theatre Organ. The exterior is not out of place in its surroundings and has good access from the road and railway station; a walkway passes through the building at second-floor level, providing access, which proves a masterful marketing design, since through the internal glass walls, the art gallery/exhibition space, which is most inviting, can be viewed from above. The foyers and refreshment areas are fitted throughout with quality theatre carpet. It is a modern, fully-equipped touring house with fourteen dressing rooms and a Bistro, and has an intimate atmosphere; it is also used for cinema, as well as offering venue hire.	
Flexibility	The complex comprises a large gymnasium, totally adaptable, which with retractable and loose seating can be transformed into a 1200-seat concert hall, rehearsal rooms and performance areas, bars, a restaurant, and ancillary rooms for conferencing	

Cambridge Corn Exchange		
		1,849 seat theatre ➢ Music/Concert ➢ Stand-up Comedy ➢ Children's Shows ➢ Dance ➢ Musicals
Facilities	6 dressing rooms of various sizes and facilities. There is however no flying facility as it is a listed building. The venue has ample storage space, with their Steinway grand piano stored behind the stage in a sealed room with controlled temperature. There is also a chair store - the passage through to backstage is often piled high with flight cases, instrument cases, stacked seating and crowd-control barriers.	
Kings Room	The Kings room, which was formerly the caretaker's apartment when the building was first built, is now a function room, often used for pre-concert talks and for meetings. This room is available for hire and is the ideal venue for small, intimate meetings, training sessions and presentations. The room seats up to 30 people theatre-style or alternatively is the ideal room for 'round-the-table' discussions. The space is also ideal for over-head presentations or flip-chart discussions (all necessary equipment provided). The room is situated directly above the main entrance of the venue and overlooks the main public area (The Schering Room).	
Flexibility	The stage is adjustable and has three possible sizes, with each segment raised and lowered hydraulically	

Birmingham Symphony Hall		
		2,262 seat auditorium ➢ Stand-up Comedy ➢ Music/Concert ➢ Dance ➢ Musicals ➢ Home to City of Birmingham Symphony Orchestra
Facilities	A bespoke balustrade system using the latest LED technology has been specially developed to bring cabaret-style events and conferences to life. The foyers are spread over several levels and can be hired out for drinks receptions, networking areas and buffet points. There are also facilities for production offices, speaker rooms and dressing rooms Backstage facilities for performers at Symphony Hall were an integral part of the design and briefly comprise: ➢ A climate-controlled Piano Store housing a selection of grand pianos from which pianists may choose their preferred instrument. ➢ An Artists' Bar at stage level where performers can relax before a performance ➢ A fully-accessible individual dressing room at stage level with an adapted en suite bathroom suitable for disabled performers. ➢ Six individual dressing rooms on the level above the stage, all with en suite facilities, sofas and armchairs. One of these rooms is the personal dressing room of the Principal Conductor of the CBSO, the others are used by performers as required. Four orchestra rooms capable of accommodating up to 120 musicians total. ➢ Two offices for the use of orchestra managers or tour managers, situated on the level above the stage. ➢ Four large communal dressing rooms on the level below the stage accommodating 120 people in total.	
Flexibility	The venue boasts great flexibility, with the use of several spaces and an innovative stage (The Next Stage). The stage can be extended using over 300 stage decks to create a floating tiered floor over the entire stalls seating area of the Symphony Hall. This provides 600sqm of floor area, allowing the hall to be used for a vast array of private events. Another option is to sink the stalls below the ground to form an orchestral pit. The wooden bank of staging on the platform (the 'risers') can also be moved off stage to create a large flat stage suitable for dance, pop concerts or conference presentations.	

Acoustics	The “shoebox” shaped hall was designed for acoustic excellence and the architecture was built around the acoustic design. An acoustic test demonstrated that if a pin was dropped on stage, the sound could be heard from anywhere in the Hall. Acoustic adjustments within the auditorium are made by physical means and no electronics are employed. One design innovation is the reverberation chamber – a 12,700 cubic metre void which is equivalent to about 50% of the volume of the Hall itself. It envelops the platform end of Hall in a U shape and links with additional chambers that run along the sides of the Hall at high level. A series of huge, concrete doors each weighing one tonne, open from the Hall and can be adjusted to create the required degree of ‘echo’. The visually striking acoustic canopy suspended above the stage is fully variable in height; it can be lowered to about 10 metres above the platform effectively creating a smaller space to focus the sound of a small number of players. Conversely, for a symphony orchestra, an expansive sound is achieved by raising the canopy to the roof, often used with the reverberation chamber. For events using amplification, a series of acoustic panels situated around the Hall are utilised in conjunction with a huge curtain of tightly woven fabric which is hung from ceiling to floor at the rear of the platform. These absorb much of the sound energy, reducing the reverberation so that amplified music and speech can be heard more clearly. On certain upper wall areas there are power-operated acoustic banners which can be lowered. On other lower wall areas there are manually operated acoustically absorbent panels against the walls.
Costs	Completed at a cost of £30 million, the hall's interior was modelled upon the Musikverein in Vienna and the Concertgebouw in Amsterdam. It was evident that such an ambitious project could not be financed solely by Birmingham City Council and there was little chance of central government funding. However, Birmingham had been designated an area for development which opened the door to European funding. The International Convention Centre was developed at a cost of £180 million including a grant of £50 million from the European Community. Plans for a £10m extension as part of the Government’s Midlands Engine Strategy

7 Exeter Sites' Assessments

Odeon Cinema, Sidwell Street

- The Odeon is the oldest cinema operating in Exeter
- The site is privately owned
- Located on Sidwell St, the Odeon was opened in 1937 and narrowly avoided serious WW2 bomb damage despite neighbouring buildings being demolished
- Today, it has four cinema screens and ancillary facilities
- The completion of the Princesshay phase 2 is anticipated to have a significant impact on the Odeon's trading performance
- At this stage, the future of the Odeon site remains uncertain
- With its location at the north-eastern end of Sidwell street, the site is physically disjointed from the main city centre, and this will remain the case even after the completion of Princesshay phase 2
- However, the relocated bus station will be closer to the Odeon site, meaning it is well served by this means of public transport

Recommendation: Discount option based on a combination of *location* (not central), *regeneration impact* (considered to have less immediate impact than other sites) and *ownership* (private)

Former BHS Store, Fore Street

- British Homes Stores (commonly known as BHS) was sold in 2015 and entered administration in 2016.
- Having fallen into the hands of the receiver, the store has subsequently been acquired and a planning application has been granted and the works are now underway.

Recommendation: Given the sale of the site and its development plans, this site should no longer be considered.

Mecca Bingo, North Street

- Original designed and built (1930s) as the 1,449 seat Gaumont Cinema
- Following the demise of cinema and ceiling repairs resulting from bomb damage, Mecca Leisure (formally Rank) have operated bingo from the venue since 1963
- Situated on north street, it is located adjacent to a large multi-story car park and close to the central retail and leisure amenities
- The building is Grade II listed, principally relating to its internal features and frontage
- Mecca leisure is understood to have implemented a sale and leaseback with the lease coming to an end in 2021
- The future of the site remains uncertain

Recommendation: Discount option based on a combination of *building listing* (limiting design and programme flexibility) and *ownership* (private). However, the car park to its rear (Mary Arches Street) has also been identified as a potential site (noted below) and therefore, consideration has also been given to whether collectively, the two sites might offer greater potential. If the two sites could be married together, then this would warrant further assessment at a later stage.

Barnfield Theatre, Barnfield Road

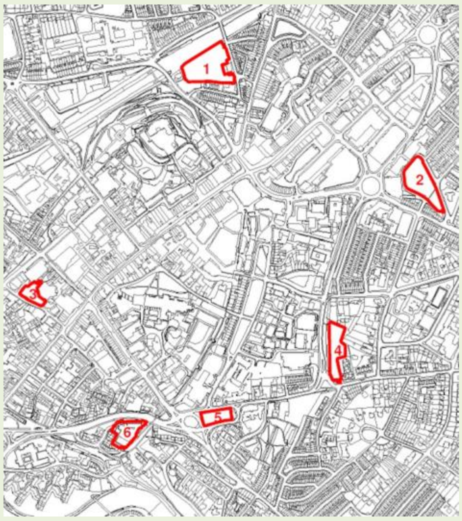
- The original Barnfield Hall (built in the late 19^{th} century) was converted into a theatre by the Exeter Library Society in 1972
- Located near to the city centre on Barnfield Road, Southernhay
- Building is owned by Exeter City Council and leased to Barnfield Theatre Limited
- The auditorium has a capacity of 289
- Its programme focuses on amateur theatre
- The Clifford room (seated capacity of 80), located on the ground floor, offers a flexible space and is used as a studio theatre, rehearsal and teaching space, meetings and conferences
- £200,000 was invested in the auditorium in 2007 and a redecoration of the bar and foyer was competed in 2015
- The trust has an ambition to overhaul the venue and increase its capacity to 600 seated and 1,000 standing

Recommendation: Discount option on the basis of size (too small to host a 1,000+ seated venue)

Corn Exchange, Fore Street	
➢ The Corn Exchange is a 1960s multi-purpose venue located on the corner of Fore Street and Market Street ➢ The immediate area around the venue has a 'independent' retail character (and near to the Bike Shed theatre) but is known for its evening pub and night-time drinking culture ➢ The venue has a maximum capacity of 500, governed by fire exits rather than available space (which could reach 800) – in theatre format, the venue has 236 raked seats and 264 flat seats. ➢ The raked seating unit is retractable so the main auditorium is flexible and can be converted to host various event formats e.g. seating, standing only, cabaret – either using the main stage or a temporary side stage, dance venue with perimeter seating and a central dance floor etc. ➢ It has a traditional proscenium arch stage ➢ Its current programme includes a mix of musicals, drama, comedy, music and dance events ➢ There is a large bar area adjoining the main auditorium as well as two meeting rooms, three dressing rooms, a kitchen (although rarely used to its full capacity) and office accommodation ➢ The building itself and its interiors are relatively tired but satisfy its current programme ➢ Backstage facilities are adequate but present some limitations for larger productions ➢ A change in levels between the entrance and auditorium are overcome by stairs, passenger and goods lifts ➢ The venue is owned and operated by Exeter City Council ➢ The building includes a number of retail units and a car park, generating an income of c.£300,000 pa	
Recommendation: Considered to be the preferred option, assuming a redevelopment of the site, based on a combination of *ownership* (Exeter City Council), *regeneration impact* (contribution to Fore Street area and night time economy), *location* (central and complementary nearby offer) and *site* (limited apparent constraints)	

Various Car Parks

- Exeter City Council owns six car parks: *Howell Road, Triangle, Mary Arches Street, Magdalen Road, Magdalen Street and Cathedral & Quay.*
- *Howell Road (1)*: Despite being a large site and located near to Central Station, it is peripheral to the city centre's retail and leisure heart and would therefore operate in greater isolation and is considered to have less regenerative potential than other sites.
- *Triangle (2):* Despite being a large site and located near to Central Station, it is peripheral to the city centre's retail and leisure heart (and being behind Jury's Inn it will remain physically separate even after the completion of Princesshay phase 2). It would therefore operate in greater isolation and is considered to have less regenerative potential than other sites.
- *Mary Arches Street (3)*: located just north (say, 150m) of Fore Street and therefore could have a positive regenerative impact in this area. Site lies at the rear of the Mecca Bingo so in theory could be physical connected and present a single development opportunity - but there is no certainty of this given the private ownership of the Mecca site. While the car park site alone is approximately equal in size to the Corn Exchange site, it has a number of physical constraints including its irregular shape and access arrangements, and potential archaeological interest. The site could however benefit from the adjacent multi-storey car park.
- *Magdalen Road (4), Magdalen Street* (5) and *Cathedral & Quay (6)*: all of these sites are located on the periphery of the city centre retail and leisure heart and physically separated by main roads. While this may reduce their regenerative impact, their connection to the road network means they are likely to have good access. Level changes across the *Cathedral & Quay* site could be both a hindrance or a benefit and its location could help to forge better links between the city centre and waterfront (being adjacent to the existing pedestrian bridge). At this stage it is assumed that the car park (c.400 spaces) would be retained requiring a new venue to be built over it and therefore requiring significant structural intervention.



Recommendation:

Discount *Howell Road, Triangle and, Magdalen Road and Magdalen Street based on a combination of their location (periphery of city centre), regenerative impact (physical separation from city centre heart).*

Discount *Mary Arches Street* as a single isolated site but if linked to Mecca Bingo this could present a more compelling opportunity.

Consider *Cathedral & Quay* as a fallback or alternative option to the Corn Exchange (based on a combination of its access and regenerative impact – being located between the city centre and waterfront). However, its location is considered less preferable to the Corn Exchange (peripheral to city centre retail and leisure).