Swindon Cultural Quarter

Toward a vision and business case for realisation

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Swindon Borough Council

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Swindon Cultural Quarter

Toward a vision and business case for realisation

Summary

July 2020

Swindon is a place of profound change. By 2026, the town and its region intends to be world renowned for innovation, entrepreneurialism and a great quality of life. Its population, growing rapidly, will be young and diverse.

At the same time, it is a town of rich heritage and present contrasts. Heritage, innovation and diversity meet in the town's cultural life, which is rich and productive, with many people enjoying the arts and heritage, many participating in and producing culture of their own.

Over recent years, Swindon Borough Council has recognised that the spaces and places in which this cultural life happen need dramatic renewal and improvement if the town is to realise its ambitions. Investments of the 1960s such as the Wyvern Theatre are reaching the end of their useful life and new cultural forms and new audiences need new facilities in which to thrive.

This study builds on a series of stages of development and intends to accelerate and to enable the realisation of an ambitious new vision for culture at the heart of the renewal of Swindon town centre, to be realised by a wide and powerful partnership, enabled by the Council over the next ten years. At its conclusion, the Cultural Quarter project is ready to move decisively to development and delivery.

This report identifies a vision for a new cultural heart to the town based on four main building block projects:

- A new Wyvern Theatre, at a scale and quality befitting the town's role at the heart of a thriving region
- A new dance centre of national reach and renown, training and engaging the regions' dancers of the future
- A new home for media, digital and arts production and consumption, reflecting the innovation that characterises Swindon, and bringing new activities such as independent cinema
- New facilities to showcase and celebrate the town's fine, nationally significant collection of art, the work of its contemporary artists, and its heritage.

- The report shows how these new facilities respond to demonstrable demand, need and ambition in the community and beyond,
- It describes an options appraisal that defines a blueprint for realisation, and a preferred site in Kimmerfields which will energise the transformation of the town centre.
- It points the way to long term viability and sustainability, and the delivery of an economic impact of more than £35m a year and 1,200 jobs for the town and region.
- It shows how this ambitious vision can be delivered through a partnership approach that brings together the town, the sector and diverse stakeholders to define, develop and sustain a Creative Quarter for all the people of Swindon – of internationally recognised scale and quality.

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1 Introduction

1.1 The background

Swindon Council's vision states that by 2030, Swindon will have all of the positive characteristics of a British city with one of the UK's most successful economies; a low carbon environment with compelling cultural, retail and leisure opportunities and an excellent infrastructure. Swindon will be physically transformed with existing heritage and landmarks complemented by new ones that people who live, work and visit here will recognise and admire.

The 2013 masterplan articulates a vision for a new cultural hub through the redevelopment of surface car parks, the Wyvern Theatre complex and adjacent buildings into a mix of bespoke buildings to provide Swindon with a cultural offer of regional significance.

There is an opportunity to create a cultural offer of regional significance. Swindon has both a rich heritage and an established arts and cultural offer. This offer is diverse and is currently provided at a number of locations. However, many have limited visibility and some facilities housing historic or cultural items and activities are difficult to access and in need of investment, meaning that now is the time to consider a co-ordinated strategy for how heritage, arts and culture are accessed in the future.

Existing cultural assets such as the renowned museum and art collection do not provide the facilities needed to showcase Swindon's collections whilst the Wyvern Theatre is nearing the end of its operational life and will require, at minimum, significant investment in the short term. This sits alongside the need to diversify the demographics in the town centre, to increase footfall and the level of spending in the town centre in the daytime and evening.

The objectives for the project leading to this outline business case were:

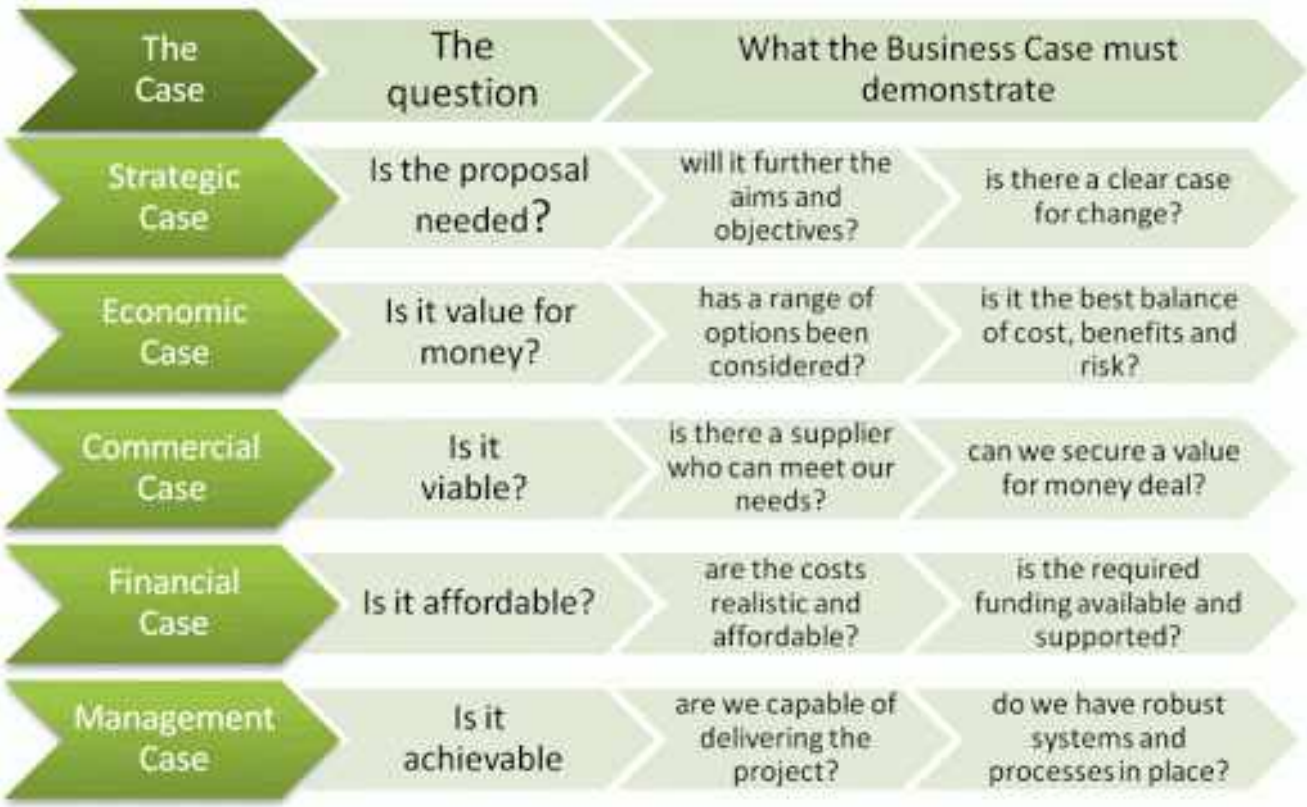
1. Refurbish or replace the Wyvern Theatre with a new, fit for purpose theatre
2. Provide a suitable home for Swindon's museum and art collection
3. Provide ancillary spaces as part of the Cultural Hub to support existing cultural organisations
4. Integrate existing cultural assets
5. Create mixed use development to increase footfall during the day, evening and weekends
6. Attract a new demographic – making the arts accessible to a range of users
7. An overall reduction in the level of revenue commitment from Council into cultural facilities.

The study has been carried out by a team of specialists expert in cultural and heritage provision, regeneration and town planning:

- DCA led the study and developed the core of the five case analysis set out in this business case.
- DCA coordinated and carried out consultation and engagement with stakeholders and arts/heritage groups.
- Levitt Bernstein Architects developed options and tested implications for the realisation of emerging proposed facilities on town centre sites.
- Charcoalblue theatre designers supported the development of the preferred model for theatre provision to replace the Wyvern Theatre.
- Focus Consultants provided cost estimates for the various options and preferred plans.

The study followed this process:

- The team carried out an extensive market appraisal to test the potential demand for a wide range of cultural provision, and consulted existing organisations and operators about their experience of operating in this market.
- Against this market context, the team discussed with existing organisations, their plans and direction, current frustrations and principal opportunities.
- The design members of the team carried out detailed appraisals of the existing buildings, and in particular of the Wyvern Theatre, and of the urban context for potential future provision.
- At an interim stage, the team developed, and discussed with the client and Advisory Group, a potential suite of new cultural 'building bocks' responding to market potential and opportunity, with particular focus on provision for a diverse audience and community.
- These building blocks were then used to explore two distinct location/spatial opportunities – the originally envisaged site at Princes Street, with the existing Wyvern, Former Town Hall and Library at its core and a new opportunity to develop facilities as part of the regeneration of the Kimmerfields site.
- Options were developed for both sites, and explored with the Council's masterplan team for the Kimmerfields site.
- Analysis of the relative strengths, opportunities and weaknesses of the two sites led to a preferred solution of development at Kimmerfields, though with a viable and attractive back up opportunity at the Princes Street site, were this not to progress.
- In the latter stage of the study, further detail of the potential developments in the preferred Kimmerfields location was undertaken, capital cost and revenue implications were developed and economic impact and return estimated.
- The study ended with discussion of ways forward toward the realisation of the preferred option.



The latter part of the work undertaken has taken place largely against the background of COVID-19 restrictions but work has continued via available platforms. In the earlier stages of the commission, a significant amount of consultation was undertaken, including a large consultation session with many civic, arts and heritage stakeholders, regular Advisory Group meetings and one to one consultations with individuals and organisations. In the latter part of the commission, individual and Advisory Group consultations have continued to help to shape and support emerging thinking. The Council and team have been able to develop plans for engagement and consultation following the study in order to build on community ownership of the project and its inclusivity.

As the study was commissioned as an outline business case under the Treasury Green Book project evaluation model, this report is set out in the structure of the five cases:

2. The strategic case

In order to determine whether there was a strategic case for change, we focused throughout the study on the following question and response:

- Is the project needed?
    - The scale and nature of the market for culture
    - The current position in cultural development in the town
    - What people told us about needs and opportunities
    - What the strategic context tells us about the case for investment.

The intention of the team during the study was to develop out of this evidence a series of propositions responding to strategic and market considerations, educated by the input of consultees, for testing in the options appraisal and development stage of the work.

2.1 The scale and nature of the market

Any new development of cultural facilities in Swindon must be located in, and tested against the realities of the market. Although the strategic case for change, focusing on social and economic outcomes for the town and on the contribution of its cultural infrastructure to broader regeneration goals, is important, the long term viability of any and all new provision will depend on demand and business opportunity.

This is particularly true of paid – admission provision – i.e. most theatre, dance, music, spoken word, other performance and cinema exhibition.

This, together with the availability of rich data for performance/entertainment provision means that throughout the following analysis, paid-admission provision is explored in more detail than free attendance of participation, but with the overall intention to test whether there is an overall market capacity for culture.

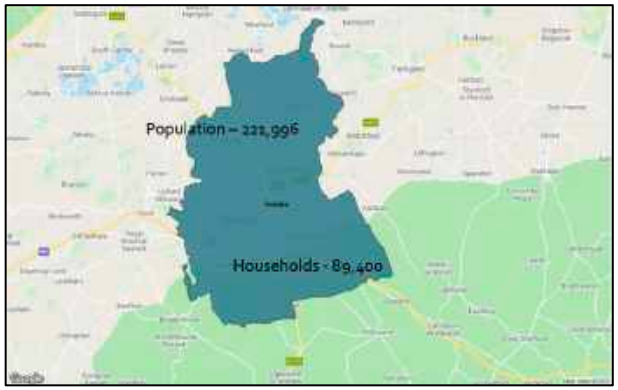
In this section we describe the broad market context and then discuss this in relation to current provision and the perceptions of those who operate and enjoy that provision, before returning to the wider strategic context.

2.1.1 The catchment areas

We commissioned specialist research into the characteristics and potential of the market for existing and any proposed new provision. The full analysis is set out in Appendix 1, and summarised here.

The overall Swindon Borough Council area population analysis and catchment analysis (postcode based) was produced using Audience Spectrum, census, TGI, Mosaic and EIMD (English Indices of Deprivation 2015) data.

We had the advantage, in understanding how this catchment actually behaves, of having rich data on actual demand for the largest of the current venues, the Wyvern Theatre, kindly shared with us for our analysis by HQ Theatres, the operator. An attenders analysis for the Wyvern was therefore produced using postcode data provided from Audience View by the HQ team.



The local authority area

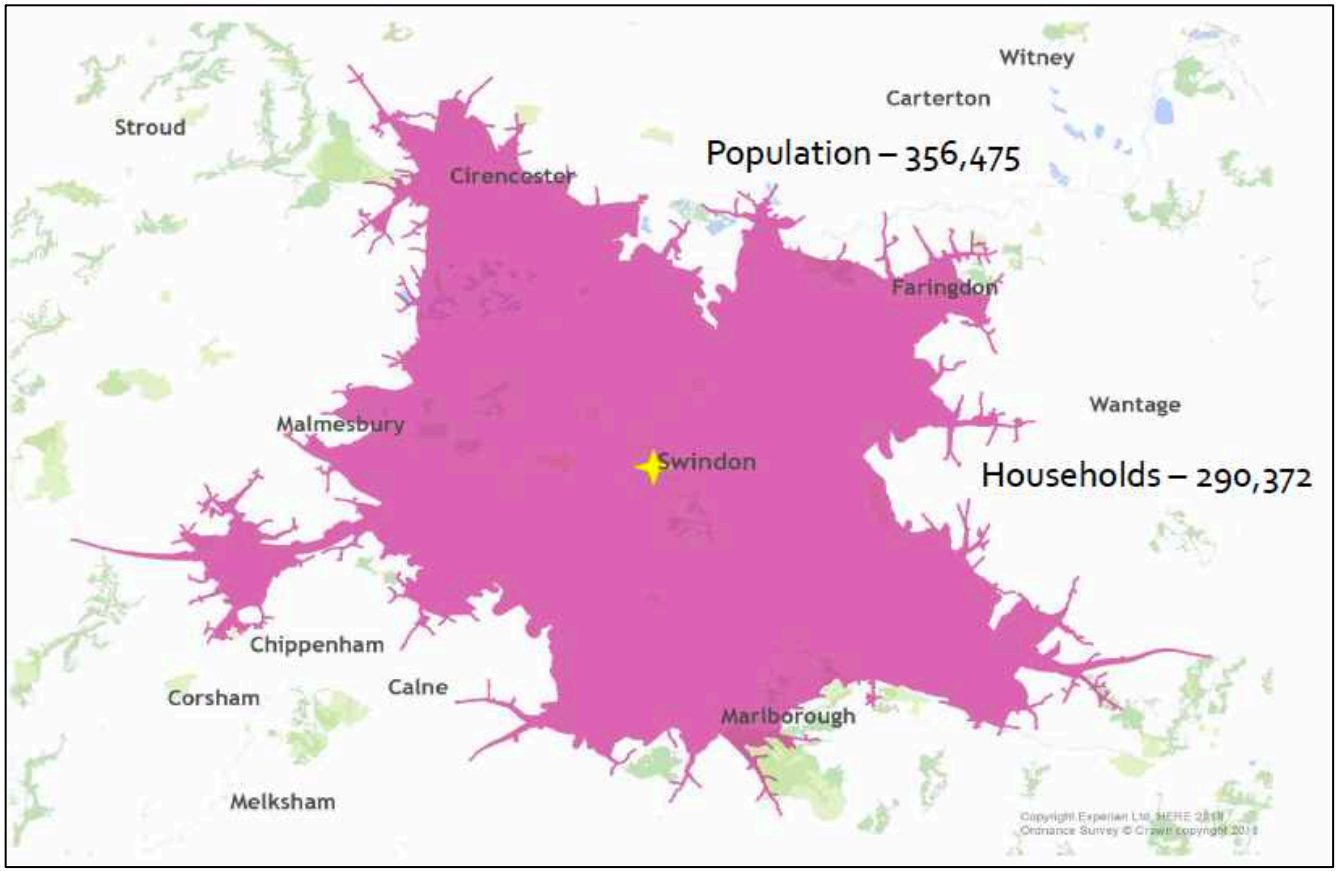
The Swindon Local Authority catchment includes 221,996 people and 89,400 households (see map in Appendix 1). 22% of households are living with high levels of deprivation and 23% are living with the lowest levels of deprivation.

However, this snapshot masks a significant underlying change. Over the last 25 years, the population has grown by 25% - twice the UK national average – and is forecast to grow by a further 22% by 2036, so that in fifteen years' time – just as major cultural infrastructure being planned now will be operating at its peak, the population is forecast to be more than 265,000, and on some policy-based estimates, more than 275,000.

This is partly a reflection of significant economic advantages. The town has one of the most attractive house price to earnings ratios of the region, and space and plans for housing growth. However, it is also an effect of economic transformation, as Swindon increasingly becomes a location of choice by virtue of its position on the M4 corridor and proximity to London and Heathrow, for corporate headquarters and for innovation-focused businesses.

Key growth sectors; automotive and aerospace, digital, pharmaceuticals, low carbon and financial and professional services are driving a rapid transformation of the character of the town's economy. This creates both significant new and different demand for culture as part of the quality of life the town offers, and challenges of inclusivity so that all Swindon's citizens, existing and new, benefit from the opportunities that change brings.

The regional connectivity of the town that underpins its economic performance is also reflected in access to a wider regional market for culture. In addition to the Local Authority boundary, we commissioned data on the 30 and 60 minute drivetimes, based on the current location of the Wyvern Theatre, in order to better understand this wider market.



30 minute drivetime

This drivetime includes 356,475 people and 290,372 households. The Local Authority coverage of this population is: 1% Cotswold, 5% Wiltshire, 8% West Berkshire and 70% Swindon. (see Appendix 1 for full postcode analysis).

Within this drivetime the population is 92% white and the age profile is similar to the GB average: 30% are aged up to 24; 53% are aged between 25 and 64; and 17% are over 65. There is also a similar number of households without dependent children (57%) and, at 91%, the population has higher levels of employment than the GB average. There are slightly higher than average levels of cultural attendance than the GB average.

The highest proportion of this population fall into the Audience Spectrum segments of Trips & Treats (23% compared to the GB average of 15%) and Dormitory Dependables (24% compared to the GB average of 15%).

Trips & Treats are families who are culturally active but busy with a wide range of leisure interests. They have a preference for mainstream arts and culture (musicals, family drama).

Dormitory Dependables regularly engage with and attend arts and culture events and form a significant proportion of cultural attenders.

Their preference is for traditional mainstream arts and heritage activities. They are also keen cinema goers.

The Mosaic profile of this drivetime indicates that 17% of households are described as Aspiring Homemakers, 11% Country Living and 10% Domestic Success.

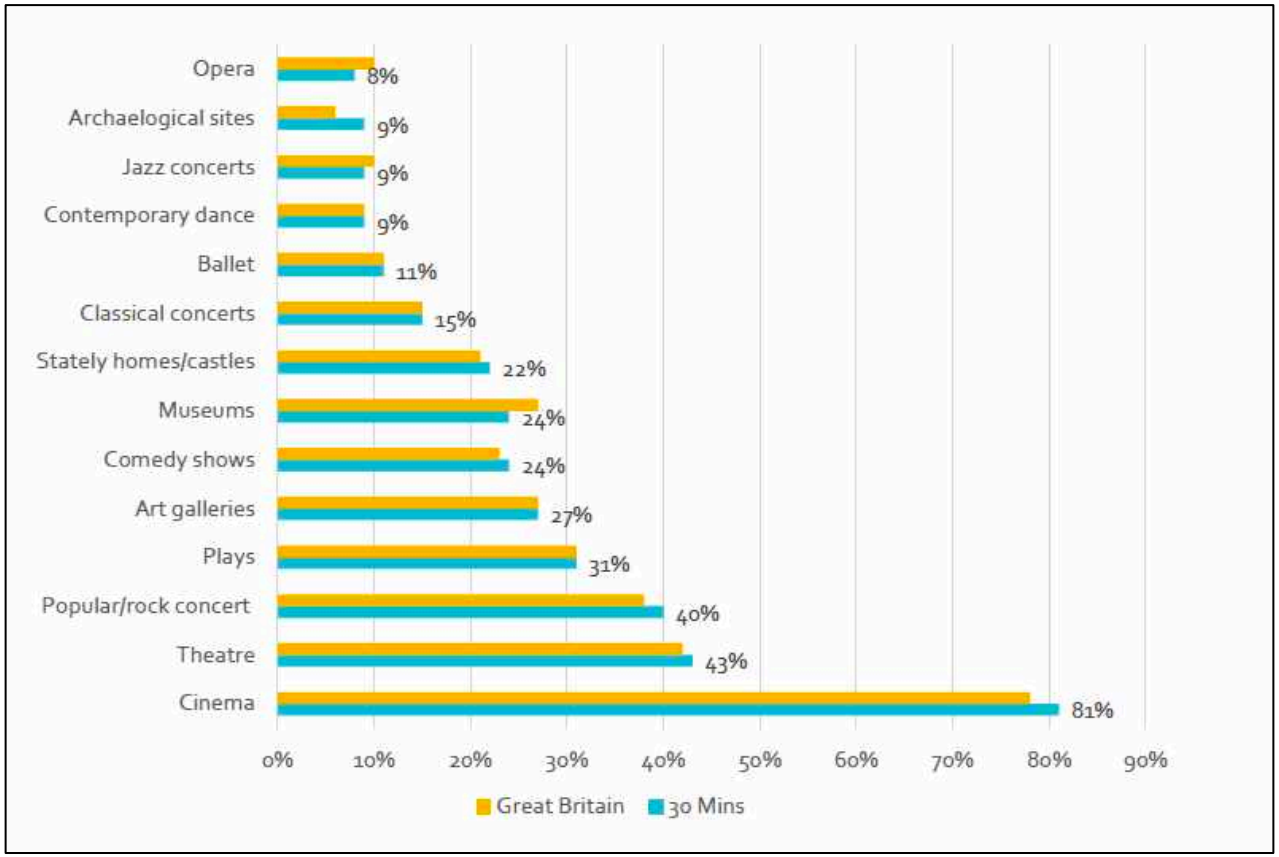
The former group is overrepresented compared to the GB average although Country Living is more reflective of the regional population.

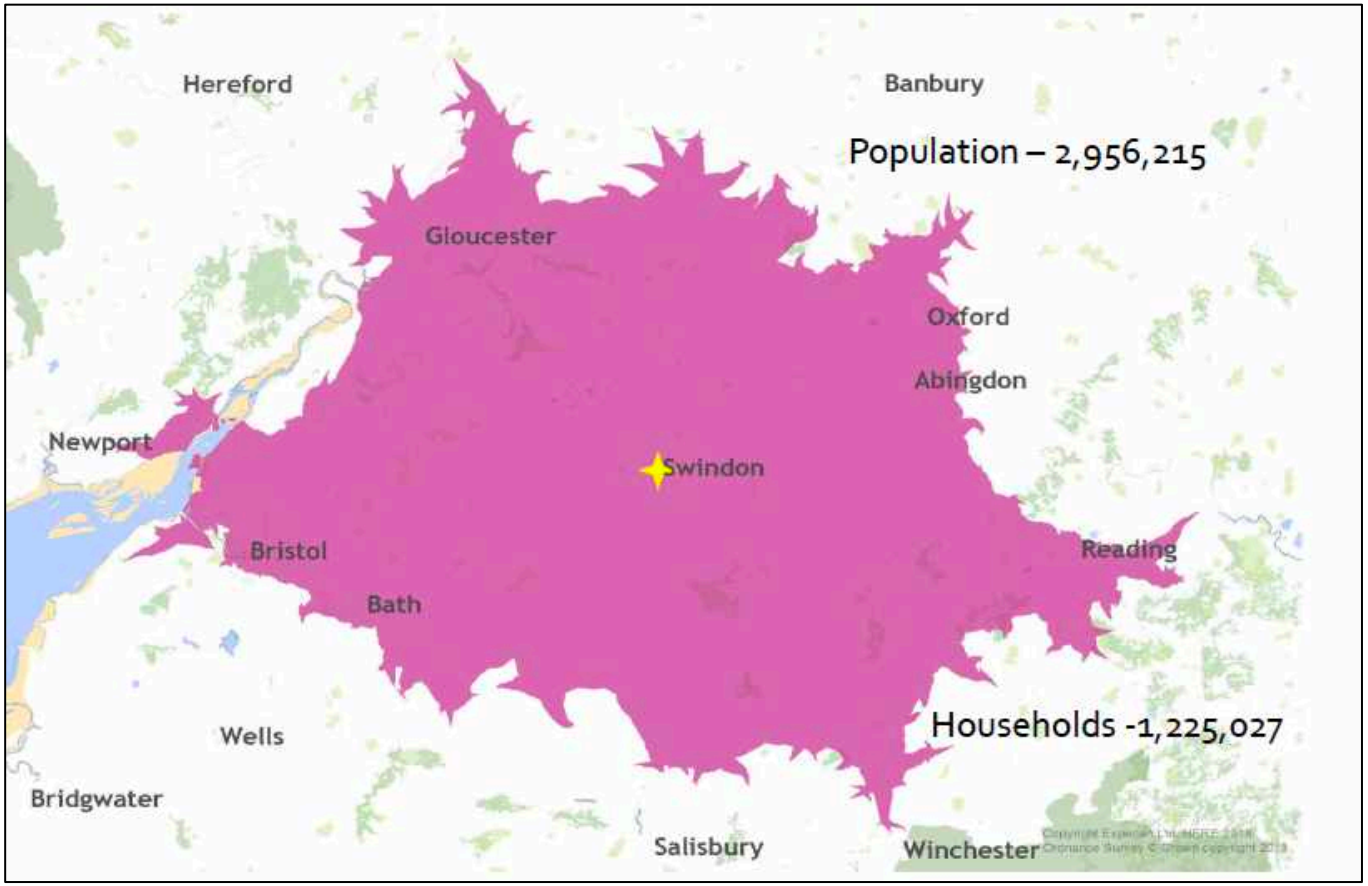
Aspiring Homemakers are younger households who have recently set up home in private suburbs. They are mostly in full time employment.

Country Living are well off homeowners living in spacious detached homes, mostly owned by themselves. The population is divided between those still working and retired with incomes from occupational pensions. Car ownership is high.

Domestic Success are high earning families who live affluent lifestyles with busy lives revolving around children and successful careers.

In this catchment, there is a slightly higher propensity to consume culture than the national average – with the strongest indications in willingness to attend popular music, theatre and cinema – and less strong performances in museum attendance and opera where propensity is slightly below the national average.



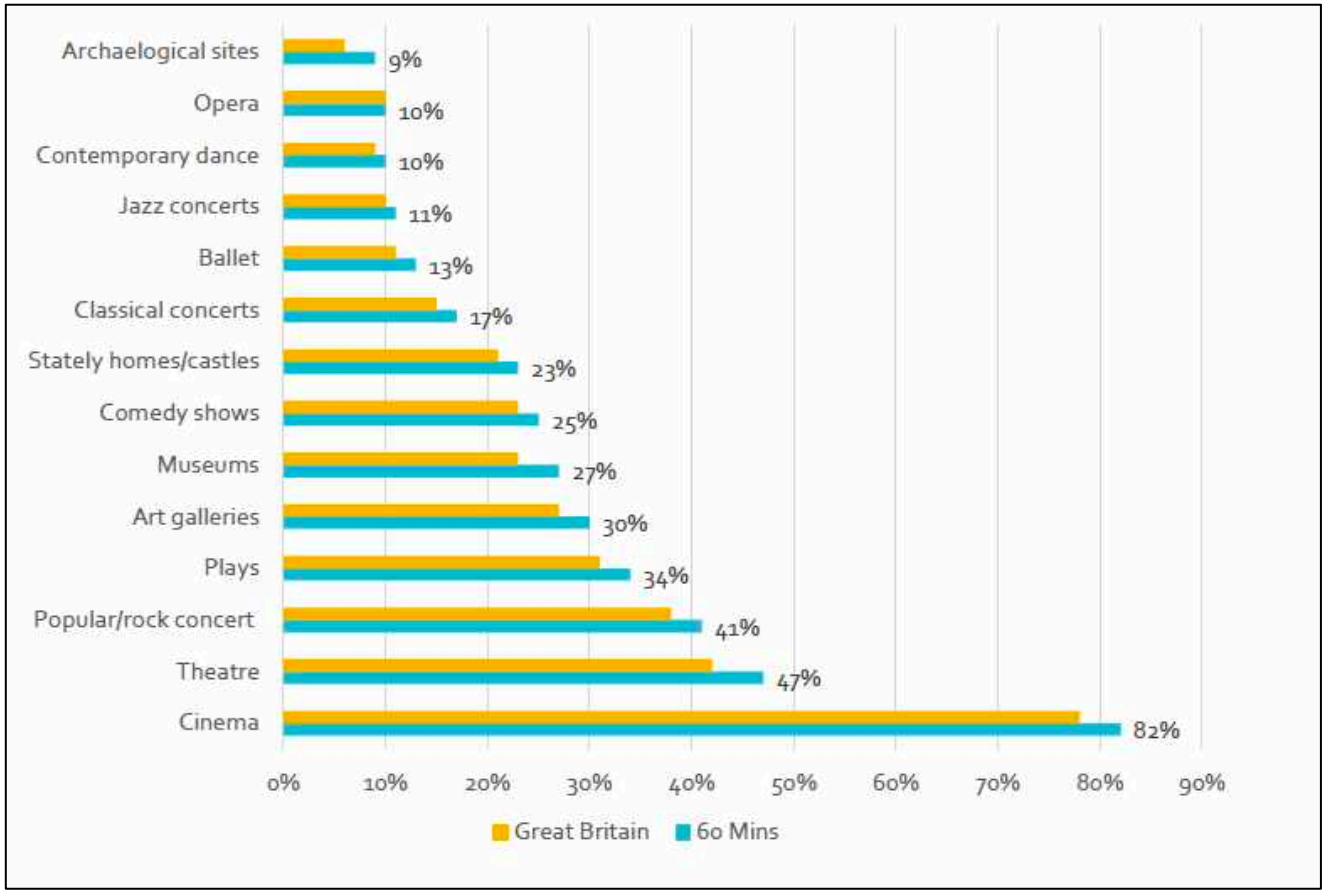


60 minute drivetime

Swindon's connectedness really shows in the extent (and population) of its accessible regional hinterland. As the map opposite indicates, the 60 minute drivetime extends from Newport in the west to Reading in the east along the M4 and GWR corridor. The drivetime includes 2,956,215 people and coverage extends to the following percentages of local authority areas in addition to Swindon:

83% Vale of White Horse,
61% Cotswold,
59% Cheltenham,
51% West Berkshire,
50% Wiltshire,
40% Oxford,
37% West Oxfordshire,
33% South Gloucester,
25% Gloucester,
18% Stroud,
9% Tewksbury & Bath & North Somerset,
2% Basingstoke & Deane & Test Valley
1% South Oxfordshire, Bristol & Cherwell.

Within this drivetime the population is 91% white and the age profile is similar to the GB average: 31% are aged up to 24; 53% are aged between 25 and 64; and 16% are over 65. There are a similar number of households without dependent children as the GB average (58%) and, at 90%, the population has higher levels of employment than the GB average.



As with the 30 minute drivetime the highest proportion of this population fall into the Audience Spectrum segments of Trips & Treats (19% compared to the GB average of 15%) and Dormitory Dependables (21% compared to the GB average of 15%).

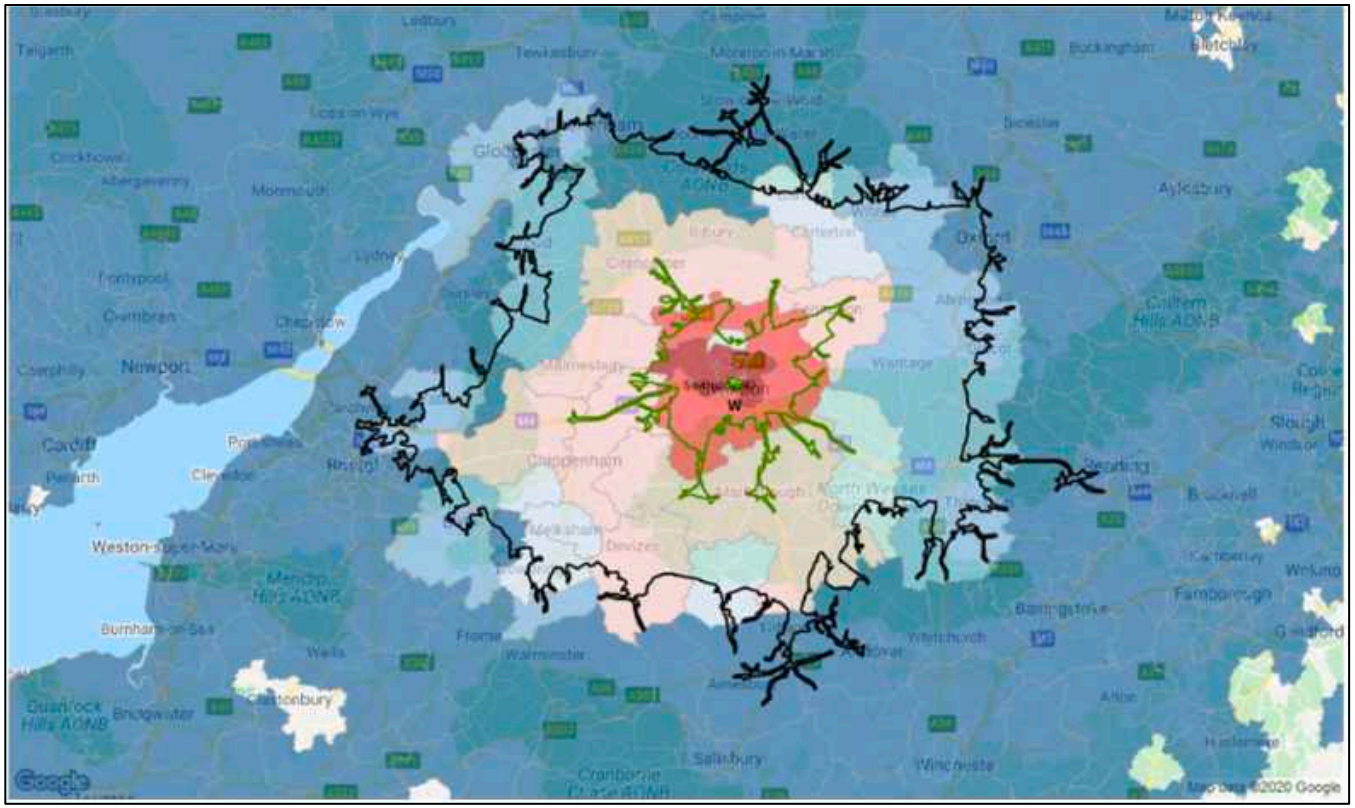
The most prominent Mosaic groups are Aspiring Homemakers (14%) , Rental Hubs (13%)and Domestic Success (12%). Rental Hubs are predominantly young, single people in their 20s and 30s who live in urban locations and rent from private landlords.

Cultural attendance levels in this catchment are significantly higher than the GB average overall. Propensity to attend is at least at national levels in all cultural sub sectors used in the data set, and above national levels in all bar one.

There are strong propensities in both theatre and plays – with particular strength in theatre audiences.

Broadly contemporary sub-sectors (contemporary dance, popular/rock music) perform very strongly, but so do more often 'classical' forms such as ballet and classical concerts and the heritage sub sectors (museums and stately homes) perform more strongly than at the more local level.

There is a particularly strong propensity to attend cinema.



Postcode	Location	Count	%
SN3	Covingham, South Marston	18,432	16%
SN25	Bluston St Andrew, Haydon Wick, Moredon	13,902	12%
SN5	Lydiard, Purton	11,928	10%
SN2	Gorse Hill, Penhill, Upper Stratton	11,848	10%
SN4	Royal Wooton Bassett, Wanborough, Overtown	9,549	8%
SN1	Swindon, New Town, Old Town	8,811	8%
SN6	Cricklade, Highworth, Latton	5,355	5%
GL7	Badminton, Blakeney, Cheltenham, Chipping Camden	3,545	3%
SN15	Bradenstoke, Dauntsey	2,978	3%
SN8	Marlborough	2,906	3%

2.2 Current audiences

Using three years of box office data provided by the Wyvern an analysis of current audiences was undertaken to better understand the audience based catchments and their profile.

Of course, as noted above, the audience for the Wyvern cannot be read as a straightforward cipher for all and any other cultural facility, but it does give us a picture based on actual data for cultural product.

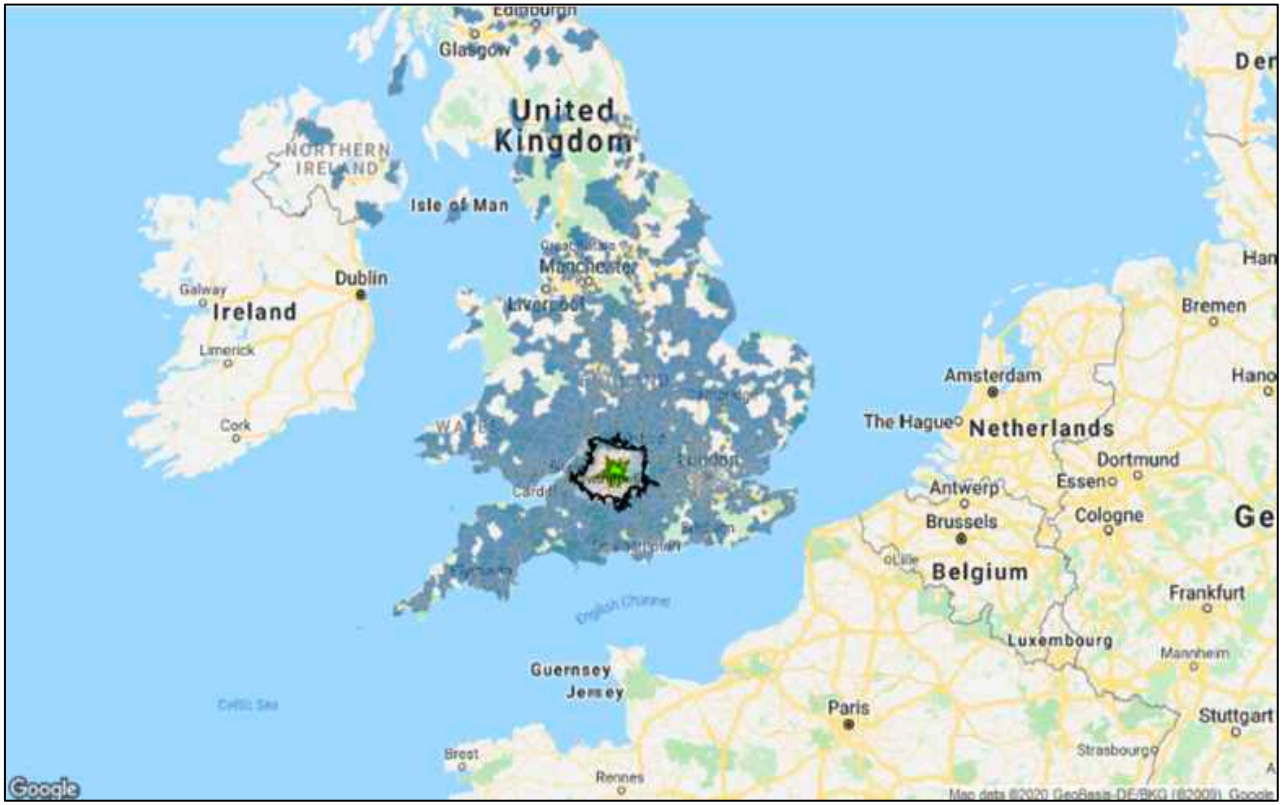
We were able to analyse more than 114,000 booker records with known postcodes from the Wyvern box office system; 64% of these were from within 30 minutes and 90% from within 60 minutes, as shown in the map opposite, where the green line is the 30 minute drivetime and the black line the 60 minute.

The majority of households attending come from within the SN postcode area and there is high penetration locally. 78% come from within the top 10 postcodes in the table opposite.

However, this pattern in fact shows the reach of the theatre and its regional audience. Although 90% of bookers come from within the 60 minute catchment (26% from between 30 and 60 minutes from the theatre), as we have seen this catchment is geographically extensive, and we would expect, in many theatres, to find smaller percentages of non-local audience. The theatre performs strongly across a wide catchment.

It is instructive to see the breadth of appeal of the theatre beyond these local and regional catchments, as shown in the map below (blue dots represent areas where booking originated).

As we come on to the economic potential of the quarter, and particularly the theatre, we will see how extended and expanded provision can drive, or contribute to, visits to the town which have significant visitor economy value:



In terms of the interests of audiences, an analysis of bookers by artform shows the following (where the 'base' is the number of records for each artform):

Artform	Base	Within 30 mins	Within 60 mins
Children/Family	6,625	59%	89%
Classical Music	1,603	66%	94%
Comedy	14,817	58%	88%
Dance	7,655	61%	89%
Film	1,014	58%	91%
Learning & Participation	25,044	75%	91%
Live Music	24,962	63%	96%
Musicals	3,448	59%	86%
Panto	12,866	62%	92%
Plays	10,128	63%	92%
Other Artform	7,136	59%	87%

The commitment of the theatre under HQ Theatres' management to learning and participation is notable, and although we would expect to see these attendances coming from the local area – in fact a sizeable number of people travel distances to participate as well as to enjoy shows.

2.3 Potential audiences

Using audience propensity data as well as catchment analysis, the potential audience available to drive attendance levels can be modelled. First in the 30 minute catchment population:

Artform	% Attendance Levels	Potential Audience
Dance	9%	32,083
Ballet	11%	39,212
Classical Music	15%	53,471
Comedy	24%	85,554
Plays	31%	110,507
Pop/Rock	40%	142,590
Theatre	43%	153,284

And using the 60 minute catchment population, very significant potential can be identified:

Artform	% Attendance Levels	Potential Audience
Dance	10%	295,621
Ballet	13%	384,308
Classical Music	17%	502,556
Comedy	25%	739,054
Plays	34%	1,005,113
Pop/Rock	41%	1,212,048
Theatre	46%	1,359,215

Of course, not all potential audiences will be converted to attend in any one year or period, but the scale of the potential catchment is significant.

2.4 Comparators and Competitors

One of the important factors influencing how far potential audience in a catchment can be converted to actual attendance, is the existence of, and relationship to competitors.

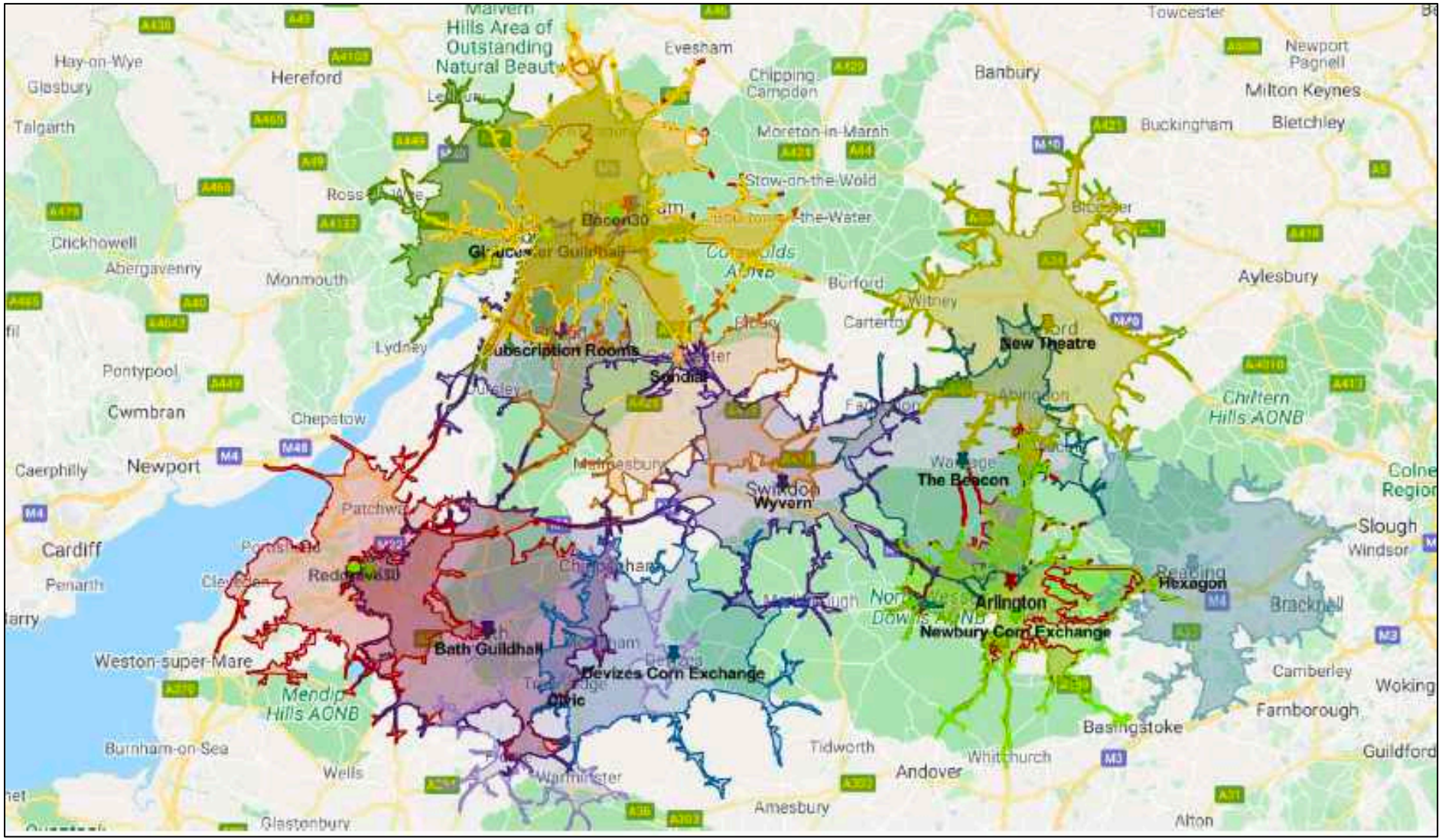
Within the Swindon catchments there are a number of venues which could be considered competitors and to understand the competitive context for the Wyvern, as well as the operating conditions of the marketplace, a competitor analysis was undertaken. This explored venues, their size/capacity and catchments (assuming a 30 minute drivetime for each venue).

The venues in the analysis are as follows:

- Corn Exchange, Newbury
- Arlington Arts Centre, Donnington
- Sundial Theatre, Cirencester
- New Theatre, Oxford
- Oxford Playhouse, Oxford
- The Beacon, Wantage
- Corn Exchange, Devizes
- The Civic, Trowbridge
- Guildhall, Bath
- Theatre Royal, Bath
- Hexagon, Reading
- Subscription Rooms, Stroud
- Guildhall, Cirencester
- Parabola Arts Centre, Cheltenham
- Everyman Theatre, Cheltenham
- Bacon Theatre, Cheltenham
- The Old Vic, Bristol
- Redgrave Theatre, Bristol

The full analysis can be found in Appendix 2.

The map overleaf shows the 30 minute drivetime catchment of each of these potential competitor venues.



Some catchment overlap is evident, but, what is most noticeable is how the Swindon catchment (purple in the middle of the map) sits at the centre of a ring of provision almost all of it well beyond the town and its immediate surrounds.

Looking at this pattern alongside the 60 minute drivetime map on page 11, we can see how the potential major competitors – the larger venues in Bristol, Bath, Oxford, Reading and Cheltenham lie on on/outside the 60 minute isochrome.

As we will go on to argue, in the larger cities, the venues will tend to specialise more (for instance being producing theatres) and compete for the entertainment audience less – so that the degree of real competition is still less.

In fact, the Wyvern shares significant catchment with only six of the sample venues, these are: Sundial, Cirencester; Beacon, Wantage; Corn Exchange, Devizes; Arlington, Donnington; New Theatre, Oxford; and Playhouse, Oxford.

The Oxford venues have distinct programming missions and we do not feel their existence really constrains growth in the provision of product and audiences in Swindon, and the remaining proximate venues are smaller and with much less commercial power than the Wyvern.

2.5 Summarising evidence of demand

What do these various analyses tell us about the potential market for renewed and potentially extended cultural provision in Swindon?
This data and analysis shows that there is significant market potential for the development of extended and new provision in Swindon:

- The town has a substantial population now and a growth trajectory that will support still larger provision over the next 15 or so years and beyond.
- The demographic character of the population supports a mixed provision, in which there will be significant demand for cultural consumption but also for participation to drive inclusivity and help to address deprivation.
- Continued growth in high tech work across the target growth sectors will demand a digitally literate and creative workforce and also support new provision in production and the work of artists and creative producers.
- The evident success of the Wyvern under HQ Theatres' management reflects substantial demand for entertainment and theatrical programming – with current programmes limited by auditorium capacity rather than demand.
- The Wyvern has a significant regional catchment, and although many customers come from Swindon, quite high proportions travel from the 60 minute drivetime and beyond.
- This is a reflection of the town's geographic position and relation to other provision – drivetime maps show that the town sits at the centre of a very substantial sub-regional population under-served by larger scale performing arts venues dedicated to changing and inclusive programmes of entertainment and serious programming.
- Such potential competition as exists is either right at the edges of the 60 minute catchment, is specialist and focused on particular work (e.g. producing theatre), or is much smaller than the market opportunity suggests could be supported in the sub-region.

- The scale and propensity to consume culture of this catchment provides very substantial 'headroom' for growth in audiences if provision could be extended to take advantage of potential demand.
- Over-subscription is common among a great deal of the provision in the town, with significant demand for participation and training opportunities, frustrated by capacity, among existing organisations such as Swindon Dance and Create.
- This analysis in respect of the performing arts is echoed in the potential demand for visual art exhibition and heritage provision, evidenced both by the success of Steam and other existing provision and by the analysis of need and demand gathered in support of the previous museum and art gallery proposals.
- There are significant gaps in provision which one would expect to have been filled given the market analysis – for instance in independent cinema exhibition, and in contemporary visual art provision – both for artist practice and exhibition.

2.6 Consultations

As part of our work we engaged with as many people as possible from Swindon's arts and cultural sector, and from the civic and learning and training sectors, in order to shape the conceptual approach for the Cultural Quarter and to map out the context into which it would fit.

This rich input adds significant detail to the data analysis of potential market demand set out above. If that analysis shows that there is significant existing and potential market capacity for new ventures in cultural provision in the town, our consultation helps us understand what 'need' such new provision might meet. We initially met with the Advisory Group to explain our approach, and had an informal walkabout in the town centre. Following this, we held a Stakeholder Workshop at the end of January 2020, which was attended by a wider group of creative practitioners, interested parties in the civic and cultural life of the town, and stakeholders in its regeneration.

We also carried out a series of one-to-one interviews with key local influencers in the cultural sector, from artists to arts organisations and cultural consumers. Just before our interviews started in earnest, the lockdown caused by COVID-19 was imposed, and our activity moved to telephone and Zoom calls. The themes that arose from these different phases of engagement are summarised below.

Strong creative pulse, splintered activity

The creative pulse of Swindon is strong – a whole range of activities are happening, but not in a cohesive manner, and there is no one place that people can go to find out 'What's On' in Swindon. Could the project tackle this?

> *"There is a vibrancy here that people don't often speak about – for some reason the people of Swindon tend to focus on the negatives"* *Luke Marquez, Shoebox Theatre*

The Centre lets us down – what can be done?

There was a significant negativity around a lack of 'permeability', the lack of a safe and inclusive night time economy, both as a challenge to life in the town and in the observation that big recruiters are losing out because Swindon is not seen as a desirable location on account of the weakness of the town centre.

The creative community's response to this was to ask for more cultural activities to be located on, and dotted through, the routes people take, to enliven the streets and to introduce cultural and creative activity through a range of venues, rather than through the development of one overarching new cultural building.

> *"Anything to bring it (the Town) alive! The railways and heritage area are great, but… there is a sense of lethargy, and those who did have fire in their bellies, are jaded!"*
> *Toni Dickinson, Artist, No Added Sugar*

> *"Use outdoor space – band stands, or a covered stage space, for festivals, arts organisations, perhaps a space for buskers – they are very marginalised. Give them a platform – to take pride in their work"* *Jon Sterckx, Tabla Player, Percussionist & Tutor, SAPAC*

Location, Location, Location!

A big part of the discussion was around where a Cultural Quarter might best be focused. Is the current location of the Wyvern correct? What will future Swindon be like, once other developments come on stream?

Wrapped into this conversation was the conceptual, sociological and physical sense of the distinction between the old and new towns.

Generally people were keen to see these two locations bridged or aligned in some way, and for the town centre itself to feel more permeable and navigable, and generally more successful. In general, however, consultees were pragmatic about the issue of location – there was a general sense that, whilst not all provision necessarily had to be in the same small area, the key priority was to develop an identifiable, clear and accessible town centre focus, in which culture might well be integrated with other uses, the better to create a critical mass and bring audiences and town centre users most broadly together.

Swindon arts and culture scene: a history of ownership and territory

Many people commented that a culture shift is needed within the arts organisations and networks to enable the local cultural economy to thrive and the need for a shake-up was raised multiple times. The current financial climate was deemed a potential influencing factor, and a lack of visibility of, and communication between, groups. One practitioner mentioned that they had lost out on funding due to not being aware that another group was pitching a similar idea. Better communication is needed and the sector needs to be brought together to function as a collective entity, rather than in pockets.

Establishing a strategic approach

Many people are aware of the various programmes being explored and developed in the town, which will have an impact upon, or be informed by, the way in which the Cultural Quarter develops. These include the Heritage Action Zone, Nationwide Towns Fund, linking with the Learning Town team, Health and Wellbeing team, Adult Learning, Swindon & Wiltshire Local Enterprise Partnership and many more. Respondents pointed to the potential for the development of the quarter to reflect and advance the Cultural Strategy for Swindon:

> *"The Cultural Quarter work needs to take a strategic view – what is the cultural strategy for Swindon? How do we help social cohesion and wider objectives around education?" Sally Burnett, Commissioner, Routes to Employment at Swindon Borough Council*

Cultivate an appetite for culture: broaden horizons, raise aspirations

> *"The Cultural Quarter is a great initiative, however we need to get the public excited. We need to prove that they need, want and are excited about it." Indu Sharma, SAPAC*

When assessing the quality of cultural activity or consumption in Swindon, many of the creative practitioners we spoke to were keen to broaden local people's horizons, and to offer something beyond entertainment and 'mainstream' arts and cultural activity. Within the context of lockdown, respondents raised how people were consuming culture – watching television programmes, films or online theatre. This presents an opportunity to encourage this openness to the new, once COVID-19 and its effects are more controlled, and people begin again to go out of the home to participate and enjoy culture. One practitioner pointed out that audiences would typically flock to things they already know, rather than try something new: the challenge is how to educate and entertain, but also to introduce new, different and perhaps challenging creative work to local people.

"There's no point putting a big new space in Swindon if what we're making doesn't raise aspirations for what Swindon can make, and see, and do. The trick is to raise the arts ecology of Swindon and retain people." Laura Jasper, Prime Theatre

How does Swindon's cultural offer help us to raise self-esteem, people's sense of achievement and over all improve people's lives through enriched positive activities – culture in its widest sense?" Sally Burnett, Commissioner, Routes to Employment at Swindon Borough Council

Engage, recruit and celebrate Swindon's diverse population

There are some excellent local groups working with BAME communities, and they are keen to be explicitly involved in the dialogue and resulting activity around the Cultural Quarter. More needs to be done to bring diversity in arts and culture to the fore nationally, and locally here in Swindon.

"As I cast my mind back to the event in January, I remember scanning the room and noticing that there was only one non-white person present. This is a glaring mis-match with the population of Swindon. There is a large Hindu population here, we have the largest Goan population outside of Goa!" Leon Flower, Swindon Library Development & Innovation Manager

In response to this, we need to make a concerted effort to identify and engage with a more representative group of people. SAPAC and those who attend their classes is a good place to start; faith leaders and BAME community leaders were mentioned in the workshop, as were The Harbour Project. In conversations with individual practitioners, offers of links and connections have been made which the Cultural Quarter project can follow up on.

"My experience of getting Tabla classes off the ground with various South Indian, North Indian and other communities is that they keep themselves to themselves – be they Muslim, Hindu or Sikh. They can be hard to engage. A creative hub encouraging everyone to be part of one community rather than keeping in little groups would be fantastic. How do we cross over into other sub-communities? It needs to be by us, for us" Jon Sterckx, Tabla Player, World Music Percussionist & Tutor, SAPAC

A welcoming, accessible environment

Many commented that the environment in which the Cultural Quarter is located needed to be welcoming, and accessible to all walks of life and people of all backgrounds: it should not feel 'exclusive.' To illustrate, the managing team of the Olive Tree Café described creating a space that is welcoming, particularly to those who are vulnerable and may be experiencing mental health challenges. A simple sign stating that this is a 'friendly space' can make a big difference, and from this small move, more deliberate moves can be made through the architectural and landscaping interventions. People described café culture, a space to meet and eat, somewhere just to 'be' and appreciate the surroundings, and the importance of bringing greenery and perhaps water features into the town centre.

Flexible spaces varying in size, more outdoor activity

With regard to the detail design of the Cultural Quarter, the needs of various groups definitely aligned, with smaller studio spaces requested, alongside a smaller venue to show 'scratch' performances and work-in-progress. Flexibility is key, and more outdoor events and activities would be welcome.

> *"It would be great to see a studio space similar to Bristol Old Vic – somewhere that can show smaller, contemporary plays. There's always something on at Rondo Theatre in Bath … look at the Birmingham Rep – more of an Arts Centre, with open workshops where you can sit and observe… something like that would be ideal for Swindon" Laura Jasper, Prime Theatre*

"We need a medium-sized theatre, 250 – 300 seats with a nice frontage, somewhere for food and drinks. Such a place would be in much demand." Indu Sharma, SAPAC

"Swindon doesn't have a versatile studio space that would seat 100-200 people. We make small-scale work that goes into schools across the region but we can't showcase these at home at present. Equally, we can't programme the work of emerging artists because such a space does not exist at present." Mark Powell, Prime Theatre

A decent sized space for performances

"We desire that Council provides a space and facility such as lecture/performance hall that all cultures in Swindon can use for promoting cultural activities, plays, theatre, etc; along with the necessary support service for these activities." Prasad Bhave, Local Swindonian

With good acoustics, somewhere with rooms for dance and instrumental classes at reasonable prices is needed. Practitioners also mentioned that the price of hiring newer spaces, (e.g. The Deanery or New College Swindon), are prohibitively expensive for smaller companies.

"The Wyvern is too small – even in the mid-range or mid-scale to programme any touring shows, in order to really make an impact." Luke Marquez, Shoebox Theatre

Space for cross pollination

Within the Quarter, people expressed a desire for spaces where different disciplines can cross, see work in progress, and initiate collaborations. Jon Sterckx explains:

"If Tabla students, dance and other disciplines could see one another practicing, there would be potential for collaboration and cross-over, forming a creative hub – made up of different activities, within sight of one another – everything in the mix together."

A space to relax, eat or drink and socialise

"It will need a place to drink, relax and feel like you're having an evening out" Indu Sharma, SAPAC

"a building with a museum, art gallery, theatre, somewhere for music performances, all relatively close together – with elegant public space. A place people feel comfortable to visit. There would be cafés, restaurants, pubs – that generate enough business that they don't have to close at 5.30pm." Dick Millard, Choral Society/Olive Tree Café

Reaching People

A comprehensive directory of creative practitioners, with updates and ways of connecting needs to be established, grown and supported by all parties. Creative Swindon Network and Switch on to Swindon show that there is a willingness: more needs to be done.

"It is difficult to get the word out. Reaching people is part of the problem – especially when I am travelling in from outside of the area." Jon Sterckx, Tabla Player, World Music Percussionist & Tutor, SAPAC

"A consultation was carried out in 2019, gathering 3-400 responses. The main reason why people don't engage in the arts in Swindon is because they don't know what's on offer." Leon Flower, Swindon Library

Engaging Young People and future audiences

"How do we reach into colleges and schools on this? To make it seem relevant to them – that the cultural activity in Swindon can belong to them. It's about belonging." Sally Burnett, Swindon Borough Council

"Flexibility is very important in Swindon – it has been identified by Arts Council England as a 'cold spot' for arts and culture: there are limited opportunities for young creative practitioners to do what they need to do to reach the next level." Anna Coombes, Tangle Theatre

"The sorts of things that would appeal to our cohorts would be something along the lines of the facilities you can find in Lambeth – UK Youth has a facility where a whole variety of activities take place – recording studios, dance studios, homework spaces, rehearsal, music rooms." Nick Capstick, CEO White Horse Federation

"Young families are the future-not us! Engage younger people from different areas of town, on lower incomes. Involve schools and colleges." Comments from Community Workshop, January 2020

"If you want people to invest long-term in culture in Swindon, this requires people to invest significant amounts of time and effort in a sustained way. Youth, culture and community are diverse. You are asking them to take a punt, when a lot of things have folded – this is a task. Literally – a culture change." Nick Capstick, CEO White Horse Federation

What these consultations tell us

Throughout the consultation sessions – the larger group event, consultations with individuals and organisations and with stakeholder and strategic organisations, there was a very strong and focused, express desire to see progress made:

- There is clearly a very lively, developed and popular cultural life in the town extending across all artforms and heritage.
- There is express demand for new and additional facilities. Many groups are frustrated by limitations imposed by facilities that are too small, or not of adequate quality.
- There is an interesting balance in the town between desire to see, hear and experience programmes and the strong desire to participate and to make creative work.
- There is a strong commitment to inclusivity and engagement.
- Although there is no single view on where new facilities should be, there is a strong sense that the town centre needs transformation.
- There is clear need for renewal and for new facilities to meet a range of interests and activities at the heart of the regeneration of the town.

Leicester

Leicester's St George's Cultural Quarter comprises a mix of high profile listed buildings as well as bold, iconic new ones. Work to regenerate the area began in 2001 with culturally-led capital developments initiated by Leicester City Council that supported the wider creative environment through investment in public realm works.

The Quarter is transforming the former textile and shoe hub into thriving area for creatives, artists, designers and craftspeople. At the heart of the Quarter is the Curve Theatre. Other buildings within the Quarter are the Makers' Yard, the Leicester Creative Business Depot (LCB) and Phoenix Square. The Makers' Yard is located in the oldest surviving hosiery factor in the East Midlands and houses 10 studios for artists and designer-makers within the listed building. The LCB also offers 55 managed workspaces together with exhibition facilities, a café/bar and meeting and conference rooms. Phoenix Square is Leicester's centre for independent cinema, art and digital culture and houses three cinema screens, 22 workspaces, offices and café/bar.

There are also a growing number of arts venues and festival activity in and around the Cultural Quarter, including a gallery and studio complex, bars and restaurants and residents.

The Cultural Quarter was a partnership between public and private investment and it is now planned to build on the strengths of what has been achieved by developing and enhancing the area further to provide more high quality workspaces and places to live, continuing to support the arts venues and encouraging sustained growth of creative industries.

2.7 Learning from others

Cultural Quarters have been a popular point of discussion and planning in town and city development in the UK since the 1980s, and there are interesting examples throughout the UK that can help us to understand what works well, what challenges Swindon might face and how cultural quarter development might help the town achieve strategic goals.

The examples on this and subsequent pages show the diversity of approaches that loosely connect under the 'cultural quarter' or 'creative quarter' banner – some are capital intensive spatial strategies achieved through the development of clusters of cultural buildings, others delineate as quarters, sets of existing buildings across town centres. Others again are more focused on policies and strategies than necessarily on built projects.

As we framed and analysed the options for the Swindon development, the principal lessons we took from these examples, and from many others around the UK, included that:

- The cultural quarter concept has proven value as a driver for urban regeneration schemes – often levering significant public private partnership investment and galvanising transformation programmes.
- Many of the examples illustrate a 'cultural quarter ecology' in which cultural consumption (seeing and enjoying things)

Southampton

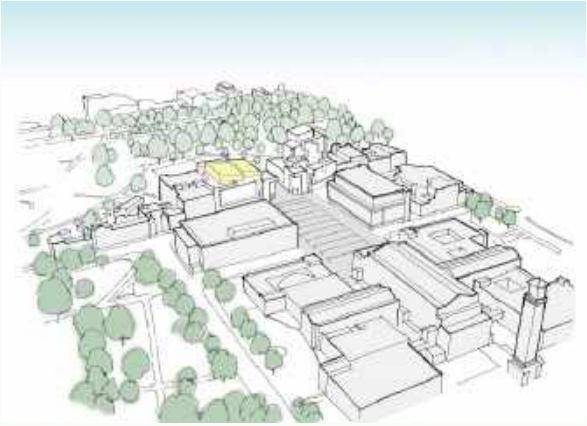
Southampton is a thriving and growing city with a diverse and growing population but with parts of deprivation. The City Council's Arts and Heritage Strategic Vision 'Towards a City of Culture', drafted in 2007, defined a role for culture and an aspiration to become an international city of culture in the region by 2026. The City of Southampton Strategy also sets out a 20 year vision for the city that places people and culture at its heart. The Strategy defined proposed cultural clusters within the city including the 'Northern Above Bar' area as the emerging cultural quarter. The City Council envisaged it as a distinctive place supporting the creative sector, providing a focal point for cultural activity and a place to nurture, develop and celebrate the city's creativity and innovation.

Guildhall Square, refurbished in November 2010, was part of this development and is now well known as the cultural quarter of the City. It is the hub of live music venues, museums, galleries, bars, cafes and restaurants and has developed over the last five years to become a vibrant and enriched arts space. The Square itself also plays host to many events, installations and exhibitions.

In 2018 the Cultural Quarter became home to the £30m 'Studio 144' arts complex housing the Nuffield Theatre Southampton (NST), the John Hansard Gallery and filmmakers, City Eye. NST offers a 450 seat main house, studio theatre, screening facilities, rehearsal and workshop spaces together with a café bar. The Cultural Development Trust brought together various partners – the Department of Media, Sport and Culture, the Arts Council and Southampton City Council - to build and develop Studio 144 over 10 years.

Councillors have acknowledged that Southampton is fast becoming the cultural destination in the region with Studio 144 an important landmark. It has helped grow the local economy by creating hundreds of new jobs, attracting tens of thousands of visitors and generating millions of pounds. City Eye and the John Hansard Gallery are also examples of how the arts can help address social and community needs in the city.

The Cultural Quarter is also home to the Civic Centre housing the offices of Southampton City Council, the SeaCity Museum, the Guildhall, the Southampton Art Gallery and the City Library.



Peterborough

Peterborough's Culture Strategy 2015 – 2020 encompasses arts, heritage, libraries and public space for cultural activity. It identifies priorities for the City Council and cultural partners and advocates continued support and investment.

The vision is to bring local, regional, national and international interest in, and acclaim for, the city's cultural offer based on the variety and quality of the experiences it offers. It's priorities are:

- To further increase participation in and enjoyment of cultural activities and celebrate diversity
- To attract, develop, promote and retain talent, including developing the local creative economy; and
- To create places and spaces for culture – using public spaces and green open spaces to ensure there are places to go and things to do.

The aims are to raise the profile of culture and increase participation within the city and raise the profile of the city through culture and increase visitor numbers.

Although the most obvious lesson of the Peterborough strategy is its bringing together of entertainment, participation and talent development, 0ne of the objectives is to develop the Key Theatre into a cultural hub and Councillors are keen to develop Peterborough as a city of culture host. This is planned to grow to include further capital projects as a cornerstone of town centre regeneration over time.

is integrated with venues for participation and joining in, and with facilities (such as those in Leicester's LCB Depot) for artists, creative companies and cultural production generally.

- This idea of the development of an ecosystem within a quarter is important in its appeal to different audiences, but also in its potential to drive different economic impacts – and not just visitor spend metrics flowing from the major consumption venues. By providing production facilities, training facilities and artists' studios and similar facilities, quarters can engage young people, provide a supply and talent chain for larger venues and producers and ensure a distinctive, locally made, identity for the quarter.
- Alongside arts and creative provision, heritage can be a powerful draw – for instance in quarters such as Lincoln where the Cathedral and Museum are the cornerstones of a quarter that links buildings of all periods in a section of the city centre.
- As the Peterborough example opposite identifies, this 'balanced portfolio' of arts and heritage, and especially of consumption, participation (and talent development) and production can be set in policy.
- And as Peterborough's vision reminds us, and Swindon consultees emphasised, the public realm, and the relationship of cultural buildings to neighbouring development is very important – both as a space for activity

Doncaster

Doncaster's Civic and Cultural Quarter is revitalising the Waterdale area of the town. Once complete it will cover about 25% of the town centre in this area which had declined in recent years with buildings from the 1960s in poor condition. The Quarter will reconnect the area to the town centre and give it a clear identity. It is one of a series of regeneration programmes across the town centre and an important part of the Urban Masterplan, whose vision includes developing the Cultural Quarter.

Some developments within the Quarter have already been completed:

- Sir Nigel Gresley Square, which opened in 2012, forms the centrepiece of the Civic and Cultural Quarter and shapes a new identity for the area. The Square is used for large events and festivals.
- A new five storey office complex housing the Civic Offices and a new Council Chamber overlooking the Square.
- Cast, Doncaster's theatre, which opened in 2013, and offers performing arts, visits from renowned companies and new work from emerging artists. There is also a café bar within the building.
- Car parking and housing has also been completed.

Large schemes are currently underway including:

- A new central library and museum, which began in 2018 and is due to be completed later this year. The building will house the Kings Own Yorkshire Light Infantry archives, an education space, micro business start-up space and conference and training facilities.
- A new six screen cinema and five restaurant development next door to Cast and framing the Square. This is also due to open this year. The Council has worked with the cinema operator, Savoy in relation to the cinema.

in itself, and as means of driving substantial footfall for the cultural offer.

- On a slightly cautionary note, the recent experience of COVID-19 might point to some lessons for quarter development. The sad demise of the operating company for the main Nuffield Theatre space in the Southampton 'Studio 144' development as a consequence of COVID-19 closure does illustrate that cultural building provision is not inured to risk any more than is any other business. The integration of multiple cultural activities and multiple operators into single integrated building developments may exacerbate risk – complicating the implications of the failure of one element of the provision in a way which might well be more manageable where different activities and different operators are largely operating discrete or separable buildings.

2.8 Meeting strategic imperatives

The national examples of cultural quarter practice above illustrate the way in which these developments are clearly led out of larger strategic regeneration, economic and cultural planning imperatives:

- Quarters focus investment on particular locations in towns and cities – with the potential of this concentration being to amplify rather than to dissipate the effects and effectiveness of investment
- As quarters typically incorporate and support significant retail (food and drink and other) provision, concentrating visitor and participant numbers in this way helps drive secondary spending and indirect and induced economic value from investment
- By carefully juxtaposing different cultural forms (for instance the theatre and independent cinema offers of the Leicester quarter) there is significant potential to encourage audience crossover – and with it the inclusivity benefits of audiences for one activity exploring other offers that they might not normally see as 'for them'
- By developing sets of discrete but clustered provision, focusing on different cultural forms, different activities (consumption, participation, production) and different audiences, quarters have the potential to lever powerful partnerships of quite diverse investors from across the private/commercial and public sectors
- Quarters are a very powerful tool for placemaking – by organising different types of activity in a set of different buildings in quarter, and within animated and programmed public space, a distinct narrative and story can be developed about the place
- And in consequence, substantial, distinctive and eyecatching statements can be made nationally and internationally about the renewal of towns and cities, their ambitions and their character.

In Swindon, the strategic context demands that the quarter successfully address a wide range of strategic imperatives, but in specific terms, the most important are likely to be the Strategic Economic Plan published by Swindon and Wiltshire LEP:

- The development of a cultural quarter in Swindon has the potential to meet four of the five strategic objectives set in the plan, to drive placemaking and the cultural and visitor offer (with consequent reputational change); addressing the need for skills and talent (and to engage and support young people); driving business development and the digital through the direct growth of enterprise and jobs in the creative sector and through dramatic changes in perceived quality of life supporting inward investment and talent attraction/retention.

The Council's own key strategies include key objectives directly impacted by the quarter in the revitalisation of the town centre, the establishment of Swindon as a key regional leisure destination (see the 60 minute drivetime analysis of opportunity on page 14 of this report), the emphasis on training and talent development, with higher paid and better quality jobs and importance of a strong and positive external profile.

These powerful potential addresses to local and regional strategy are complemented by the potential to meet national strategies for towns (including the recent Towns Fund and High Street strategies developed by Government) and for culture, with the Arts Council's new strategy for the period 2020-2030 'Let's Create' with its emphasis on the balanced portfolio of enjoyment of culture and (particularly) participation and production.

The ACE strategy sets out in its three principal outcomes:

1. **Creative People**: Everyone can develop and express creativity throughout their life.
2. **Cultural Communities**: Villages, towns and cities thrive through a collaborative approach to culture.
3. **A creative and cultural country**: England's cultural sector is innovative, collaborative and international.

It seems to us that the cultural quarter has potential to drive progress in the region toward these outcomes:

- Through the cultural revival and mobilisation of one of the region's principal towns
- Harnessing the collaborative power of a full partnership of the Council and Swindon's excellent and renowned ACE national partnership organisations
- Driving innovation and collaboration through a balanced portfolio approach that delivers in particular in respect of the engagement and empowerment of young people – inspiring them through great things to do, see and hear; empowering them through training and engagement opportunities; and harnessing and retaining their talent through space and showcases for cultural production and enterprise.

At this stage of the project, the key deliverable of the study is that we have identified a level of demand and market capacity, evidence of existing performance to instil confidence in growth, express need and ambition, and a powerful strategic case for investment.

This gives us the basis and framework to develop and test options and propositions for realisation.

3. The economic case

The economic case for investment seeks to show how options for the project have and can be developed and assessed, and out of these options to show why a particular project solution is preferred.

3.1 Analysis of options

In the case of the Swindon project, there are several dimensions to these options appraisals:

- What should the project seek to prioritise and achieve?
- What options are there for its constituent parts?
- Where might it be best developed to maximise value and outcomes?

Throughout the study, we have developed these options for formal appraisal and tested them against the framework of the strategic case, above, and with the Council and its stakeholder partners via the Project Advisory Group and in consultation.

3.2 Developing a project definition

In light of the strategic case established in section 2, we can begin to define the potential building blocks of provision of cultural infrastructure for Swindon that might form part of the development of a cultural quarter at the heart of the ongoing regeneration of the town centre and growth of cultural life in the town over coming decades.

The building blocks are intended to be an expression of need, demand and potential which can be overlaid on options for different sites and arrangements of sites as explored later in the economic case.

The scopes for the building block projects below are based on current provision, consultation and market appraisal and the rationale for their make up is a response to this analysis.

3.2.1 Rationale for development

The starting point for the development of cultural provision and quarters is, with sound logic, to look at facilities for cultural consumption. These are often:

- The largest building blocks in spatial planning terms.
- The key and largest investments.
- The drivers of very large footfall, direct and indirect economic impacts.
- High profile and transformational with immediate impact.

The most obvious, but not only, opportunity to grow cultural consumption in a new quarter is the replacement for the current Wyvern Theatre – a pressing challenge given the structural and condition issues with (as well as the limitations of) the current 1960s building.

However, a particularly interesting aspect of the research we have conducted, and the consultations we have carried out, in Swindon has been the existence of a vibrant and highly ambitious version of the three-legged stool of provision that towns and cities seek to develop as a balanced portfolio of cultural development:

- **Consumption** – driven most especially by the Wyvern, there is clearly a substantial market for consumption of performance and entertainment at scale and with evident current and potential future growth.

  Both market appraisal and competition analysis support the potential for significant supply of product and demand from audiences, significantly out-stripping what can be achieved in the limited capacity of the Wyvern as it is now.

  There are also other consumption forms in art, heritage, cinema, dance and literature with potential in Swindon.

- **Participation** – driving the participation of all people, but particularly young people, in cultural activity is a key policy goal of the cultural system – developing the artists and audiences of the future and potentially transforming the economic lives and well-being of large numbers of people in communities.

  Swindon is particularly strong in this respect, with a series of mature and highly effective organisations in a range of artforms, including (but not limited to) Swindon Dance, Prime, Create and Reach.

  The fact that Swindon has a significant number of Arts Council England National Portfolio Organisations is both in part a reason for this richness of provision but also an acknowledgement of it.

  Participation facilities are important elements of the mix of cultural quarters, diversifying the reach of the quarter, driving economic outcomes, particularly long term talent development and broader educational and vocational outputs, and driving day and year round cultural and economic use in quarters.

- **Production** – vibrant cultural places balance consumption and participation with production for maximum economic effect.

  Swindon clearly already has a production sector, both in higher end creative industries businesses and the digital and in a diverse artist/creative community – and studio provision in the current cultural quarter area, including that provided by Artspace. However, young people clearly do feel that many leave to

pursue opportunities elsewhere and do not necessarily find opportunities to draw them back.

Given the overall impetus Swindon has in innovation, technology and digital growth, we would expect there to be an imperative to invest in and develop the innovative cluster of creative/cultural businesses and talent that exists in the town.

Embedding cultural production facilities in towns/cities and cultural quarters leads to better retained economic value in local economies than pure consumption, supports the identification of creative talent and its retention/recovery locally (when otherwise many talented young people will leave and not come back), drives more balanced supply and demand economies, develops self-sustaining supply chains and networks, improves town/city competitiveness and provides the varied benefits of developing, retaining and supporting a significant population of artists and creatives for education, social cohesion and wellbeing and civic identity and pride.

We therefore recommend that the town aims to develop a cultural quarter that includes infrastructure meeting all three activities – consumption, participation and production. These will potentially play out over a series of buildings, with each building potentially contributing to one, two or three of the activities.

At this stage, however, we think that there is a strong case to see the provision organised in three main blocks, with potential for a fourth, or for distribution of this fourth set of functions across the other cultural, or potentially non-cultural buildings.

3.2.2 Renewing the Wyvern Theatre

The principal cultural consumption building in the potential brief for a cultural quarter is the Wyvern Theatre.

The Wyvern is a substantial medium scale regional receiving theatre and entertainment venue, driving significant attendance numbers through largely single night or very short run programmes in theatre, musical theatre, music, dance, comedy and other spoken word programmes.

The present building is poorly fitted to future provision in terms of condition/obsolescence and in its restricted capacity and format (625 seats, fixed format).

There is clear market potential for a larger provision c1,200 seats, retaining full theatrical flying and with a more flexible main stalls area to enable standing audiences and banquet and other formats.

If the theatre is being made anew, this would clearly be the preferred and recommended option. This larger theatre would enable both much increased economic and cultural impact, but also improved operating economics.

If the current theatre was being retained and remodeled, there might be options at lesser scale which could be tested to balance capital cost savings with lost income against the preferred model, but as a new build proposition on a site other than the current footprint, we would recommend the 1,200 scale replacement.

A more detailed specification/precedent for this option is set out in Appendix 3.

The new theatre must be a distinctive and clearly identifiable theatre. The audience journey from home to theatre seat is very important to theatres, and arrival at the theatre building is a key part of this journey. Theatres that share entrances with, for instance, shopping centres, libraries, civic hubs and other building types have often struggled to command the presence and identity that they need to trade strongly. Taking into account also its scale, the theatre probably cannot therefore be integrated with other property types. However there is significant potential to place theatres in order to drive the economic benefits of their significant footfall (a major theatre at this scale might easily drive 600,000 footfalls annually), by positioning the theatre on a square with food and beverage offers, hotel accommodation, etc.

3.2.3 A new regional/national dance centre

Swindon Dance is an established and highly respected dance participation and training provider. From its current premises in the former Town Hall, the organisation, which is an Arts Council England National Partner Organisation, provides participation opportunities for many young people, older people and people with different needs. Its main work is in dance training and it works with substantial numbers at all levels from early years to pre-degree foundation and on to teacher training and CPD for professional dancers. It manages regional provision of various sorts at sites elsewhere in the South West.

Swindon Dance does present work for public consumption – both regular performances by its many participation and training groups, and monthly professional touring dance shows. Production is supported by professional support and mentoring and through the provision of studio space to dance companies to produce and rehearse work – though this is currently strictly limited by shortage of space.

The current Swindon Dance facility in the former Town Hall building, whilst it was clearly an ingenious and creative reuse of this heritage building 40+ years ago, is clearly not going to meet need and ambition going forward. It is overcrowded and has extremely poor accessibility. No single dance studio is of the professional benchmark dimensions, there are too few studios for current activity and growth is frustrated. Shortage of space means that professional/production support facilities standard to dance centres such as physiotherapy and dance injury therapy are not available. Investment in new dance facilities for Swindon would be highly strategically appropriate:

- It is an existing area of strength with regional and some national profile.
- Swindon Dance is severely frustrated in its growth and progression through the tiers of ACE support by lack of accessibility and space.
- There is evident unmet demand and potential to grow the regional, national/ international role and reputation of the town in the dance sector.
- Dance is particularly effective at connecting with young people and families, both as a participative activity and as an option for careers, this fits Swindon's demographic and brand as a place to live and work in the future.
- Participative dance is highly strategically geared to wellbeing (physical and mental) and healthy living priorities.
- Dance is highly susceptible to capital funding from cultural funding and from charitable foundations and others.
- Taken together with a new Wyvern, a nearby dance house would establish a critical mass of performing arts facilities of quality and range.

In order to model the potential scale and footprint of a dance house development, we would suggest as a basis Dance City in Newcastle, which we have used as a basis for option testing at this stage.

The detailed specification of a new dance house for Swindon would need to be developed with Swindon Dance and others in the sector, but this is a good starting point with roughly the right number of studios.

Dance buildings of this nature are relatively easy to develop and design – there are several really good precedents and they are essentially simple collections of rectangular volumes. In positional terms, they benefit significantly from public transport proximity (bus and train) and live happily together with shops, cafes and restaurants. It is perfectly possible to create a significant amount of accommodation off ground floor to insert street frontage uses at ground floor as most users will know where they are going – but ideally inserted street frontage uses will avoid the least healthy food and drink offers. Many participants will be children, families and young people, including many young women and significant numbers of disabled people, so safety, accessibility and visibility are important in placing dance facilities in developments.

3.2.4 Artist/Media production facility

Again in keeping with the focus of Swindon's growth and brand on innovation, as a national HQ destination for agencies such as UKRI and for a long list of corporate and R&D functions, there is a strong logic to focusing cultural production in the digital, moving image and film/broadcast sectors.

Although there is a range of innovation and tech workplaces in the town, including the Workshed initiative, there is an opportunity to place this at the heart of the town centre and complement the cultural quarter in all strands, consumption, participation and production.

These buildings, combining workspace for creative businesses, training and production studios in a range of disciplines from video through music and digital content, coworking and hangout space, and at the consumption end independent cinema and social spaces, are strong drivers in many UK cities and larger towns – for instance at Watershed in Bristol, Broadway in Nottingham, Home in Manchester, Fact in Liverpool, Chapter in Cardiff and in smaller places such as Galeri in Caernarfon. They drive day round activity and especially night time economy, attract and engage with young people in both consumption and training and development, drive the retention and return of talent to be based in towns and, if configured correctly, are economically viable in operation.

Market appraisal and industry consultation suggest to us that there should be a straightforward market to build on and extend the limited independent film provision currently available at the Arts Centre through the Film Society, providing three independent screens in a mini-plex, operating full time, day and evening as film exhibition venues but also capable of hosting industry events and screenings, spoken word and other events such as the literature festival and supported by an excellent food and drink cluster. We would suggest that planning begin with cinema capacities of 130, 80 and 60.

Building on the profile and resources of Create (another ACE NPO), and our wider market appraisal, this independent cinema offer could be embedded in/combined with a cultural/ creative and digital hub. Although there are existing spaces such as Workshed, for fledgling operations and individuals, experience elsewhere has emphasised the importance of providing supported, alternative, easy in /easy out and informal space at the heart of the town/city and close to other central functions and transport links. Such a space, clustered around the independent cinema and food and beverage offer could provide:

- Shared/dedicated space for creative businesses.
- Hang out and flexible 'lounge' space.
- Meeting and training rooms.
- Small scale production studios.
- Editing and post production rooms.

This development would also present options to provide managed space to accommodate artists' studios at a variety of scales, from a probable minimum, if studios are to be provided, of 15 studios.

Clustering them with this use and management and building economics would be the most effective way of responding to demand for artists' studios at the core of the town centre/cultural quarter, though there may well be a continuing role throughout the town centre, and elsewhere in the town more generally, for diverse studio provision of the sort developed and managed by Artspace as well as others.

Finally, across the provision of this and the replacement for the Wyvern, there would be opportunities to accommodate performance workspace and a small performance studio. At present companies such as Prime based in the Wyvern use its upper studio, but in terms of their interest in film as well as live performance and in their own demographic and production/consumption model, this performance studio and rehearsal/ production/company base might be better located with the media centre functions.

In summary, a development such as this would be scalable, and would be stackable – all functions, including cinema screens, can be located at upper floors, though successful centres need a 'landing point' at ground floor with minimum foyers, welcome/ticketing and appropriate food and beverage offers.

In scale, we would expect an assembly of spaces along the lines of:

- Cinemas – three at sizes as above – probable area total c500sqm + tech and circulation.
- Production/enterprise/working space and offices – c1,000sqm.
- Front/back of house and technical – c750sqm.
- Food and beverage to suit overall development but no less than 80 covers and associated back of house in associated café bar.

3.2.5 Museum, art gallery functions

In many ways, these functions are the most flexible in terms of the extent, nature and location. There are several potentially very exciting ways of envisaging development of new provision as successor to the current Apsley House.

Firstly, we don't think that there is a necessary link between museum and art display functions. These are currently co-located as they have been historically in many towns and cities in the UK, but the two collections are quite different and will always be challenging to link thematically or in audience development terms. The main benefit of the current co-location is that the two can be supported by a single staff team and in that there are some common requirements (for storage of collections for instance).

It would be relatively straightforward to separate the two collections, but if this were to be pursued, logically at least one of them, and probably both, would have to be linked with some other provision if there is not to be a fracturing and inefficiency of multiple sites, teams and costs.

Alternatively, as has been attempted previously, there is the widest range of possible models for the development of a new building and offer with the museum and art collections and activities combined.

The art collection is the most significant of the two collections – with its focus on the very high quality Twentieth Century collection both bequeathed to the town and since developed through collecting.

This collection is also currently the subject of very interesting work to enable it to be loaned to all kinds of locations in the Borough, the better to be seen and enjoyed, under the "Art on Tour" project.

The collection has real quality and there is a real national interest/market for art of the period on which it focuses. At minimum, one could see a role for a nicely configured 'Gallery of Twentieth Century British Art' working in this semi-specialist visitor market.

This will not, however, drive very significant visit numbers or economics, and may feel rather 'quiet' and out of place in a bustling new town centre environment (unless, perhaps, it was the content driver for the programming of a 'pavilion' in a public square/space).

The most logical extended and more significant and viable role building on the collection would be to bring the art collection together with a reinvigorated and regionally ambitious programme of touring and changing exhibitions of contemporary and recent art historical shows, in which a series of (potentially modest in scale)

galleries in a single building enabled changing showing of the collection alongside and intertwined with temporary shows covering the same period as the collection, and of contemporary work (toured in, produced or co-produced or by way of e.g. artists' residencies), as with Towner in Eastbourne opposite.

This could be in a new cultural quarter, or could be offset from the quarter given the weight of focus of the provision above on performing arts and media content. It would be an excellent extension of the 'Art on Tour' programme – drawing audiences back to a central set of exhibition provision and extending the partnerships with 'Art on Tour' host organisations to the programming and animation of the central provision.

In a new cultural quarter, a contribution to range, diversity of atmosphere and audience could be contributed by either:

- This integrated art function, or
- One or both of a dedicated 'pavilion' show of the collection and/or the contemporary art production/ presentation/participation function integrated into one of the other facilities described above – most probably the Artist/media production facility.

This would leave separate the local museum function currently housed alongside the gallery at Apsley House.

The collection is probably best described as 'good ordinary'. It tells some of the stories of Swindon through time, but it is not a complete narrative – not least because of the importance of the railway era, which story is told at Steam.

The Museum is justifiably held in affection by local people and is a resource for inter-generational sharing of stories, including with new generations of people coming to live in the modern Swindon as it grows. It is, however, modest in scale and mixed in terms of heritage significance. There are, as with so many small museums in the UK, objects which have little or nothing to do with Swindon.

As a stand-alone, the Museum collection probably does not have the scale, significance or 'draw' to be a realistic and efficient proposition. Nor, however, does any re-provision of it need really to be part of the cultural quarter. There are a number of classic responses that have developed over time in the UK and one of them may be the right way forward for this modest collection:

- Integrate local collection, alongside local history, with the library. There is a prima facie opportunity in Swindon's Central Library which has generous space and potential to extend at upper floors on the currently little used roof terrace that opens from 1st floor.
- Use the collection to bring to life a historic property undergoing renewal – often done in the UK as part of Heritage Fund supported projects and often not in town centres.
- Move the collection to a larger specialist museum – for instance Steam. This would be a risky strategy given the importance of brand distinctiveness for Steam in its own marketing and complicated by the fact that the Steam offer is charged admission.

In terms of built provision in any new town centre development, then, there are options to be explored for integration of some or all of these functions in buildings serving more than one purpose (though for both art and heritage offers visibility will be important – e.g. in pavilions or at ground level to street) or in dedicated separate buildings if this improves the overall planning and animation of cultural aspects of the plan.

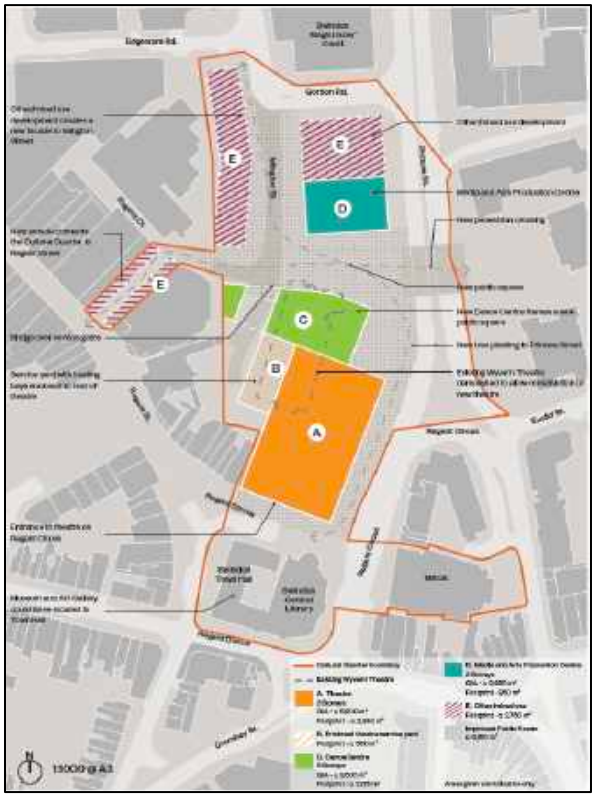
In the latter case, the precise scale of the provision is essentially negotiable – but as a starting point might be based on 1.5 to 2 times the area of the current Apsley House provision – either as a combined museum/gallery offer in which the gallery provision is prioritised, or in a dedicated gallery/art offer with the museum function provided elsewhere per the options above.

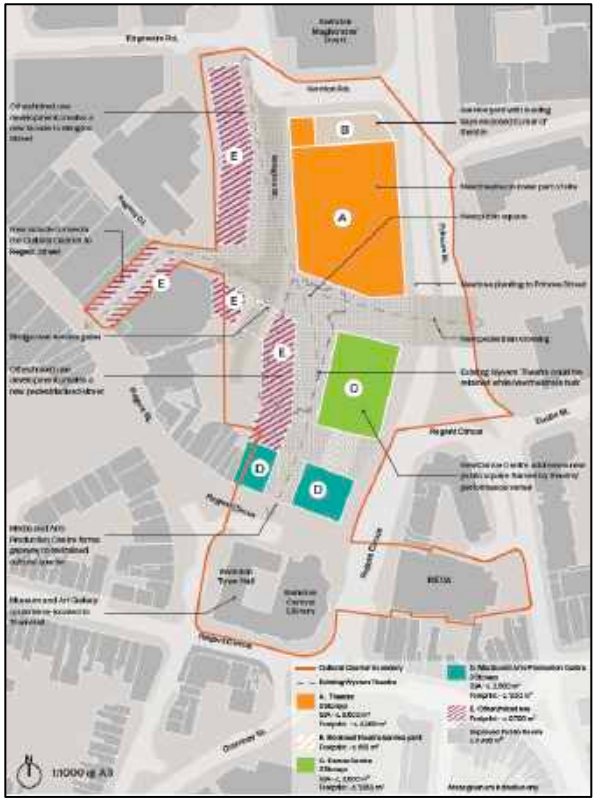
3.3 Site options

During the study, we also had the opportunity to consider how this blueprint for the building blocks of the cultural quarter might be located in the town centre.

Two options for location were fully investigated during the study:

- The initially identified potential location at the current Wyvern Theatre and surrounding site off Princes Street.
- An alternative option in which the cultural facilities would be integrated into the regeneration of the Kimmerfields site between the railway station and retail core.





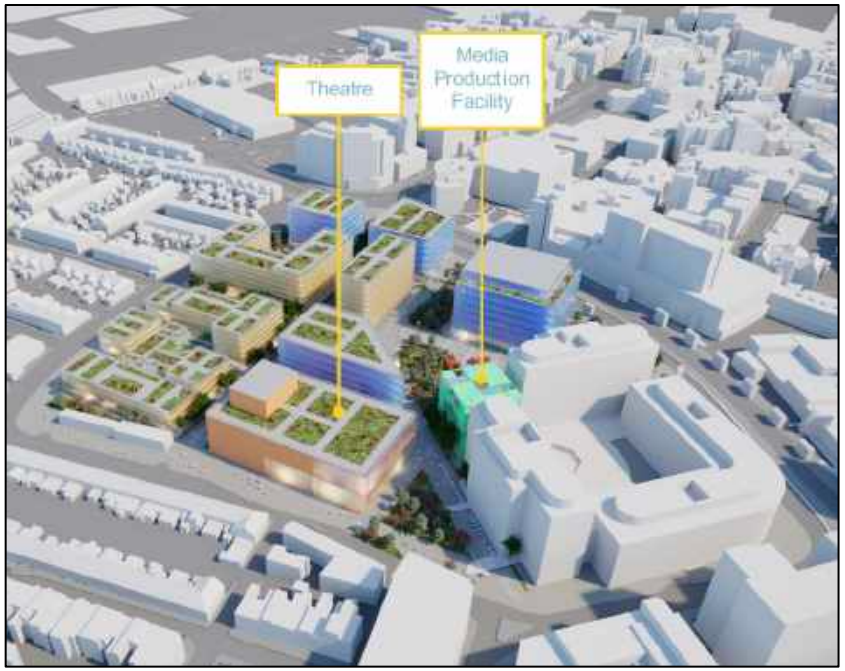
3.3.1 Princes Street

In the case of the Princes Street site, we carried out a full analysis of the urban framework, potential approaches to remaking the area and location of the cultural quarter building blocks. This is attached in Appendix 4.

Future urban form and links to other parts of the town centre, but also practical issues of phasing of developments. Currently, part of the site, the existing lower car park site below the Wyvern Theatre, is earmarked as a temporary bus station during the clearance of the Kimmerfields site (where the current bus station will be closed and demolished).

Although there are several options for the organisation of the Princes Street site, the essential strategic choice is between the option on the left of this page, in which the upper site of the current Wyvern is redeveloped to provide a new Wyvern Theatre, as specified earlier in this section, and extending across the current footprint and to the south to front onto the current Town Hall square. Other building block projects and potentially complementary residential or office development would largely occupy the lower car park site.

The alternative, to the right and lower of the two diagrams, enables the Wyvern to continue to trade until the new theatre is complete, and avoids the potential requirement to provide a temporary theatre for some years in the interim.



The smaller blocks of the other buildings may well make a better compement to the scale of the former Town Hall square, and on balance we believe that this strategy is likely to be the preferred solution at any development of this Princes Street site.

3.3.2 Kimmerfields

The Kimmerfields site has significant development benefits, much of it already cleared and ready for construction, with significant sums raised and/or invested in the costs of infrastructure and masterplan development.

Working with the Council's consultant team, we were able to visualise how the key building blocks of the cultural quarter, and in particular the theatre, could be integrated into the Kimmerfields plan – as shown here. In discussion with the project team, client group and project Advisory Group, there was broad agreement that there were significant advantages to the Kimmerfields option:

- The sheme is already well advanced in planning terms – progress may be more rapid than on the Princes Street site
- There is an opportunity to develop a significant critical mass of activity, adjacent to the railway station and close by the retail core, generating very significant footfall and underpinning viability of the cultural offer.

- There are interesting potential routes to realisation of the smaller building block facilities of the quarter as part of multi-purpose buildings within the Kimmerfields masterplan – and accordingly of a range of interesting public/private development partnerships.

As we saw in the case studies of cultural quarters around the UK, the Swindon options do reflect different types of quarter development more generally. Quarters tend either to be integral to the regeneration of core areas of town centres (as with Kimmerfields) or to be an approach to regeneration of a discrete, off-centre, zone of the town or city – sometimes as a way of addressing underuse or shifts in gravity (for instance in the Waterdale area of Doncaster – at one end of the existing town centre), which is the situation we find at Princes Street.

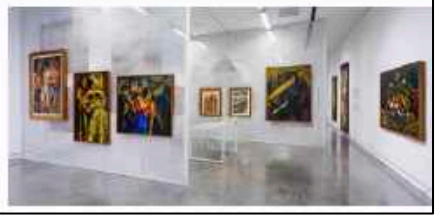
The consultant team takes the view that either Kimmerfields of Princes Street could be made to work. However, while there are some advantages of revivifying the Princes Street/Town Hall square end of the town centre through culture, we do have a certain nervousness that it may be difficult to resist the gradual withdrawal of high-volume footfall that this end of town has suffered in recent years.

The Regents Circus development saw significant investment in this zone, but even prior to COVID-19, the development was showing signs of struggling to deliver the critical mass of use needed to sustain it, with the closure of the supermarket and some of the restaurants. While a cultural quarter adjacent would likely strengthen the leisure offer and footfall at this end of the town and in turn for the Regents Circus development, caution may be needed to be sure that investment here can turn round the trend of recent years away from high-volume and high-value uses in the area.

3.4 Preferred option and value

At the conclusion of the options appraisals for the stage, we therefore have a clear consensus around the direction of the project – focusing on a scheme of ambitious scale, but which is driven by evidenced need, demand and potentially delivers excellent value for money:

- A building block approach delivering needed and strategically important facilities, supporting consumption, participation and production.
- Clarity over the development of largely separate building block projects, so as to best support appropriate commercial and partnership arrangements in each case – but with potential for shared location with other developments.
- A preferred location in Kimmerfields which can return significant value, directly from the facilities but also as an accelerator of focused town centre commercial development.

Wyvern Theatre Consumption	Clear market potential for a larger provision c1,200 seats, retaining full theatrical flying and with a more flexible main stalls area to enable standing audiences and banquet and other formats.	
Artist/Media Production facility Production/Consumption	These buildings, combining workspace for creative businesses, training and production studios in a range of disciplines from video through music and digital content, coworking and at the consumption end independent cinema and social spaces, are strong drivers in many UK cities and larger towns.	
Dance /performance centre Participation/Production	The current Swindon Dance building is not going to meet need and ambition going forward. It is overcrowded and has extremely poor accessibility. Investment in new dance facilities for Swindon would be highly strategically appropriate.	
Museum and Art provision Consumption/Participation	Aimed at providing appropriate and higher profile settings for the celebration of the art collection and contemporary art activity, and providing the appropriate setting for the local 'town' museum collections and heritage activities.	

4. Affordability, viability and delivery

At this stage of the project, the technical analysis of viability, affordability and detailed delivery; usually organised under the commercial, financial and management cases; is in relatively early form and we have taken them together on one analysis in this section to show indicatively how the scheme might be assembled, resourced and realised, and its potential economic value given the structure and scale of the business that we anticipate could be generated.

4.1 The preferred option – structure

As discussed in the preceding sections, the research and analysis stages and options appraisal in the study have led to a preferred option based on the development of four building block projects, as summarised and illustrated by precedent here.

Across the four building block projects there are different degrees of preparedness and definition, and a wide range of options for phasing their implementation. A key advantage of developing separate building blocks rather than seeking to collocate all these functions in one over-arching cultural centre building is the ability to take discrete, appropriate and effective routes to realisation in each of the facilities:

- Each project can be developed with the specific sector or commercial partners most appropriate to its operation – so that the four projects, whilst supported and coordinated by the Borough Council fully engage partners in the campaign, funding and development of management options for their operation.
- Each can be subject to the most appropriate financing or funding mechanism, so that commercial investment, regeneration investment, grant funding and charitable contributions can be directed to clearly eligible projects with clear outcomes for each investor.
- Operating responsibility and business relationships can be developed for each of the projects appropriate to their economic basis and with an overall broad coalition for the success of the quarter as a whole.
- In each case, stakeholders and end users can have a clear voice in the development of the facility and in its ongoing direction, so that arts organisations, artists, young people, communities and friends of cultural and heritage activity can be empowered and recognised as key partners in each specific project.

4.2 Stages of development

This approach to project structure recognises that each of the projects is at a slightly different stage of development:

- The Wyvern Theatre replacement is urgent and central to the vision of the new cultural quarter, and its economic and regeneration value. Its specification can already be developed clearly given current operations, market analysis and the existence of excellent industry intelligence and partnership around the project table.

  It also needs to be moved forward swiftly as its locational and site requirements are exacting and with limited flexibility – so its position at the heart of the masterplan for the Kimmerfields (or Princes Street) site must be defined and tested so as not to hold up other development or compromise its realisation.

  Whilst the project will be expensive because of its scale, its potential for economic return and viable operation is high. We would expect the current net operating cost of the Wyvern Theatre to be removed and net income to be generated by the new larger capacity, trading facilities and quality of audience experience.

- The Dance Centre can be defined by the working practice, and requirements of Swindon Dance and by reference to the network of regional dance centres across the UK developed in the last twenty years (including Dance City in Newcastle referred to above as a comparator).

  Given the strategic value of dance to funders in the UK, and the support of various charitable foundations and individuals for the artform, we would expect that a funding package could be assembled to move toward realisation.

  However, the form of partnership and operating economics will require further development, so the business model may well be the focus of development in the next stages.

- The Media/Arts Production Centre is a relatively new concept to the mix of proposed facilities in Swindon and further discussion and modelling will be required to specify both its facilities and the partnership and management model for its operation.

  Elements of its potential provision (for instance artists' and enterprise studios/working space) are essentially scalable in that there will be substantial and renewing demand, and will be limited more by the interplay of initial capital cost and potential revenue return (studios and enterprise space is often demand elastic but price sensitive and inelastic in these buildings) and this will require further investigation.

  Realisation and operation may well be financed by a wide range of mixed commercial and third sector investor/operators, so as well as further definition of facilities and scale, significant thought will need to be given to the operating and management model, the investment and return framework and the nature of potential public private partnership.

  This having been said, both the dance and media/arts propositions are essentially simple building types with defined characters and technical requirements and can be driven from concept to completion very quickly if these feasibility processes can be completed and there is an imperative to swift realisation.

- Finally, the building block based on the museum and the art collection/exhibition functions presents interesting opportunities as part of the wider regeneration effort as well as an integral part of the quarter development, and others consequent upon the definition of the other building blocks.

Whilst major new build heritage-based projects are less likely to be readily financed as the funding system prioritises risk of loss of heritage buildings, there will be exciting opportunities to reflect and build on the 'Art on Tour' work that the Council has initiated as COVID-19 restrictions evolve and, hopefully, lessen.

4.3 Viability and value

This further development of the feasibility of each of the building block projects will significantly advance understanding of the viability of each project in terms of capital cost and finance and revenue viability in use.

At this stage, however, to enable strategic decision making, we have developed outline specification for, building areas and types for, and consequently costs for the series of projects. These are summarised in the table below, but it should be noted that at this stage:

- Costs are based on a Kimmerfields solution with public realm and site infrastructure provided by others. A Princes Street solution may incur additional cost in temporary provision (e.g. c£3m for a temporary theatre) and for public realm costs.
- Whilst based on specifications, benchmarked against similar projects and allowing sums for fit out costs, all costs are only indicative at this stage, and may change on development
- In the case of, e.g., Museum and Art Gallery costs, there is significant scope for change depending on the solution.
- Contingency appropriate for the stage is allowed. Due to uncertainty of programme, costs are at current prices.
- No costs of land, remediation, major utilities supply, VAT or other one off costs are allowed.
- Cashflow is indicative in line with current forecast programme

Swindon Cultural Quarter Development stage fees			Cashflow indicator based on assumed delivery programme								
			2020/21	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**	**2026/27**	**2027/28**	**Check**
Gross cost	**Fees as % of cost**	**Stage as % of total**	170,000	676,880	1,787,859	6,980,522	11,564,978	19,532,536	19,019,275	18,916,623	78,648,674
Cost ex fees	**15%**		0	0	0	3,695,652	10,760,870	17,992,754	17,992,754	17,992,754	68,434,783
Analysis of Fees											
RIBA 1	12.0%	2.5%	170,000	35,304							205,304
RIBA 2	15.0%	12.5%		641,576	641,576						1,283,152
RIBA 3 (planning)	15.0%	20.0%			684,348	1,368,696					2,053,043
RIBA 4 (FBC)	15.0%	25.0%			256,630	1,710,870	598,804				2,566,304
RIBA 5 to completion	15.0%	40.0%			205,304	205,304	205,304	1,539,783	1,026,522	923,870	4,106,087
											-
Total		100%	170,000	676,880	1,787,859	3,284,870	804,109	1,539,783	1,026,522	923,870	10,213,891
Fee percent check											

Key to the affordability of the project will be the funding and financing structure across the four building block facilities.

The period of the study has been challenging in this respect, as potential funders and investors have been necessarily preoccupied with managing the COVID-19 response.

Most funding systems for cultural projects and for capital infrastructure have been placed on hold and although we expect new schemes to be announced from late 2020 and 2021, funders have not been in a position to be certain what the scale and direction of these schemes will be, nor to make commitment other than in general terms to the emerging cultural quarter project.

Nonetheless, we do expect that there will be a period ahead of investment in projects that will drive economic recovery.

We can also begin to see how this imperative to invest for economic recovery and regeneration may be accompanied by specific trends arising from the response to COVID-19 and which may well strengthen the case for investment in projects such as this one:

We expect that investment will be available for schemes that:

- Drive economic recovery swiftly and sustainably through the immediate future

- Give particular support to town centres through the challenges to retail and economic activity that COVID-19 has exacerbated
- Support jobs and entertainment opportunities closer to populations, to minimise longer distance commuting and travelling
- Achieve community resilience and wellbeing outcomes in towns such as Swindon so as to contribute to a more resilient community
- Develops new cultural (and community) infrastructure designed to be more resilient to the challenges of virus/pandemic and other threats, so for instance we would anticipate significant design improvements to a new Wyvern Theatre to enable more resilient responses to change and challenge than has proved possible in the country's existing stock of venues.

Given this, we can map the quarter projects against the general direction of strategy and investment of the key potential funders, and we can begin to assess the opportunities and scale of commercial and loan-based investment that will be supported by the commercial returns of the quarter buildings.

An initial appraisal of the way in which the four projects map across this funding and financing landscape is shown in the table here.

Building block	Investment potential
Theatre	• Cultural grant and charitable funding limited, due to commercial provision • Economic development/regeneration funding potential good – due to scale • Corporate sponsorship and naming rights – significant potential • Potential for revenue improvement and commercial partnering • Council will need to take a leading role throughout
Dance/performance centre	• Cultural grant/charitable funding – key strategic sector enjoys excellent support • Economic development – potential on basis of skills and talent development • Corporate/commercial support and partnering more limited • Council will need to take enabling and strategic role
Artist/media production centre	• Cultural grant/charitable funding – eligible sector enjoys some support • Economic development – significant potential on basis of skills and impacts • Commercial partnering and developer partnerships eminently possible • Council will need to take enabling and strategic role
Museum and art provision	• Potential for cultural grant/charitable funding, but significantly focused on heritage buildings rather than new build • Some potential for economic development and corporate support • Council will need to maintain support and leadership role

Although costs are estimated on the previous page, the potential for grant is therefore uncertain, and the detailed financial return in partnership arrangements or trading will need to be worked up in the next stage of the project as partnership and commercial discussions are put in hand. It has not been possible to forecast accurate BCRs at this stage, but we expect positive investment cases to be forthcoming on cash benefits, wider regeneration outcomes and funding development in the next stage of work.

In conclusion, initial mapping of potential actual commitments gives confidence that, whilst there remains significant uncertainty as to the eventual financing mix, there are likely to be deliverable financing strategies and investment cases for the building blocks.

These costs and funding/financing strategies, will be seen in relation to the benefits and value for money of the potential scheme. Throughout this report, we have seen how the project can deliver significant strategic benefits both to the Council, the sector and to strategic partners in regeneration and culture:

- Driving and helping to sustain a vibrant town centre which brings together commercial, civic and cultural uses and audiences to create a distinctive, resilient and vibrant centre in which citizens have a pronounced sense of ownership and engagement.
- Transforming perceptions and supporting the drive to develop Swindon's visitor economy – as shown by the already significant proportion of Wyvern Theatre attenders coming from the wider region and beyond.
- Delivering significant social outcomes in opportunity for local people, talent development and retention, wellbeing and active lifestyles.

The measurable economic impact of the development of the four building block projects will be substantial – as the initial Economic Impact Appraisal calculations on this and the following page show, potentially generating direct and indirect economic activity of £35m per annum and over 1,200 jobs, after allowing for deadweight, displacement, leakage and optimism bias:

Swindon Cultural Quarter

Economic Impact of visit numbers by point of origin - New Wyvern Theatre

			Local (30 minute drivetime) visitors to Arts Centre			Day visitors from wider catchments			Overnight stay visitors			Performer and crew spending			Sub Total all visits	Adjustments				Total
Type of Visitor	current visitor numbers per annum (FOOTFALL - ALL USES)	forecast visitor numbers per annum	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Total Spend all visits	Less 10% Allowance for deadweight	Less 10% Allowance for displacement	Less 35% Leakage (theatre) & 15% indirect	Less 15% Allowance for optimism bias	Total net effect
Direct flows	250,000	475,000	332,500	£ 18.53	6,160,845	95,000	£ 23.42	2,224,584	47,500	£ 35.13	1,668,438	4,910	£ 4.89	24,000	10,077,867	9,070,081	8,163,073	5,305,997	4,510,098	4,510,098
Indirect flows from off site expenditure			332,500	£ 14.82	4,928,676	95,000	£ 18.73	1,779,667	47,500	£ 99.33	4,718,333	4,910	£ 38.88	190,933	11,617,609	10,455,848	9,410,263	7,998,724	6,798,915	6,798,915
Induced effects in the rest of the economy					3,326,856			1,201,275			1,916,031			64,480	6,508,643	5,857,779	5,272,001	4,481,201	3,809,021	3,809,021
Total			332,500		14,416,377	95,000		5,205,526	47,500		8,302,803	4,910		279,413	28,204,120	25,383,708	22,845,337	17,785,922	15,118,034	15,118,034
Procurement and production															6,500,000	5,850,000	5,265,000	4,475,250	3,803,963	3,803,963
Procurement/ production indirect etc															3,250,000	2,925,000	2,632,500	2,237,625	1,901,981	1,901,981
Total															37,954,120	34,158,708	30,742,837	24,498,797	20,823,977	20,823,977

Swindon Cultural Quarter

Economic Impact of visit numbers by point of origin - Media/Arts facility

			Local (30 minute drivetime) visitors to Arts Centre			Day visitors from wider catchments			Overnight stay visitors			Performer and crew spending			Sub Total all visits	Adjustments				Total
Type of Visitor	current visitor numbers per annum	forecast visitor numbers per annum	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Total Spend all visits	Less 10% Allowance for deadweight	Less 25% Allowance for displacement	Less 35% Leakage (direct) & 15% indirect	Less 15% Allowance for optimism bias	Total net effect
Direct flows	-	178,600	151,810	£ 11.12	1,687,719	17,860	£ 14.05	250,933	8,930	£ 21.08	188,200	720	£ 2.93	2,111	2,128,964	1,916,067	1,437,051	934,083	793,970	793,970
Indirect flows from off site expenditure			151,810	£ 8.89	1,350,176	17,860	£ 11.24	200,746	8,930	£ 99.33	887,047	720	£ 33.26	23,950	2,461,918	2,215,726	1,661,795	1,412,526	1,200,647	1,200,647
Induced effects in the rest of the economy					911,369			135,504			322,574			7,818	1,377,265	1,239,538	929,654	790,206	671,675	671,675
Total			151,810		3,949,264	17,860		587,183	8,930		1,397,820	720		33,879	5,968,147	5,371,332	4,028,499	3,136,814	2,666,292	2,666,292
Procurement and production															3,900,000	3,510,000	3,159,000	2,685,150	2,282,378	2,282,378
Procurement/ production indirect etc															1,950,000	1,755,000	1,579,500	1,342,575	1,141,189	1,141,189
Total															11,818,147	10,636,332	8,766,999	7,164,539	6,089,858	6,089,858

Swindon Cultural Quarter

Economic Impact of visit numbers by point of origin - Dance centre

			Local (30 minute drivetime) visitors to Arts Centre			Day visitors from wider catchments			Overnight stay visitors			Performer/tutor/crew spending			Sub Total all visits	Adjustments				Total
Type of Visitor	current visitor numbers per annum	forecast visitor numbers per annum	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Total Spend all visits	Less 10% Allowance for deadweight	Less 5% Allowance for displacement	Less 15% Leakage	Less 15% Allowance for optimism bias	Total net effect
Direct flows	-	93,125	79,156	£ 4.00	316,802	9,313	£ 5.00	46,588	4,656	£ 7.50	34,941	3,120	£ 2.93	9,150	407,481	366,733	348,397	296,137	251,717	251,717
Indirect flows from off site expenditure			79,156	£ 3.20	253,441	9,313	£ 4.00	37,271	4,656	£ 99.33	462,521	3,120	£ 18.56	57,897	811,130	730,017	693,516	589,489	501,065	501,065
Induced effects in the rest of the economy					171,073			25,158			149,239			20,114	365,583	329,025	312,574	265,688	225,835	225,835
Total			79,156		741,316	9,313		109,017	4,656		646,701	3,120		87,161	1,584,195					978,616
Procurement and production															2,600,000	2,340,000	2,106,000	1,790,100	1,521,585	1,521,585
Procurement/ production indirect etc															1,300,000	1,170,000	1,053,000	895,050	760,793	760,793
Total															5,484,195	3,510,000	3,159,000	2,685,150	2,282,378	3,260,994

Swindon Cultural Quarter

Economic Impact of visit numbers by point of origin - Gallery/museum

			Local (30 minute drivetime) visitors to Arts Centre			Day visitors from wider catchments			Overnight stay visitors			Performer/tutor/crew spending			Sub Total all visits	Adjustments				Total
Type of Visitor	current visitor numbers per annum	forecast visitor numbers per annum	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Number	spends per visit (direct, indirect and induced effect)	Total spend/effect £	Total Spend all visits	Less 10% Allowance for deadweight	Less 5% Allowance for displacement	Less 25% Leakage	Less 15% Allowance for optimism bias	Total net effect
Direct flows	-	90,000	54,000	£ 6.67	360,201	18,000	£ 8.34	150,084	18,000	£ 12.51	225,126	1,200	£ 2.93	3,519	738,929	665,037	631,785	473,839	402,763	402,763
Indirect flows from off site expenditure			54,000	£ 8.89	480,268	18,000	£ 11.24	202,320	18,000	£ 99.33	1,788,000	1,200	£ 99.33	119,200	2,589,788	2,330,809	2,214,269	1,660,702	1,411,596	1,411,596
Induced effects in the rest of the economy					252,141			105,721			603,938			36,816	998,615	898,754	853,816	640,362	544,308	544,308
Total			54,000		1,092,610	18,000		458,125	18,000		2,617,063	1,200		159,535	4,327,333					2,358,667
Procurement and production															2,080,000	1,872,000	1,684,800	1,432,080	1,217,268	1,217,268
Procurement/ production indirect etc															1,040,000	936,000	842,400	716,040	608,634	608,634
Total															7,447,333	2,808,000	2,527,200	2,148,120	1,825,902	4,184,569
Total - all activity															62,703,794	51,113,040	45,196,036	36,496,606	31,022,115	34,359,398

Finally, the development of the cultural quarter potentially delivers excellent value for money when seen in the context of the ongoing liabilities and challenges that the Council and sector face given the extent and state of current infrastructure.

The most obvious aspect of this is the Wyvern Theatre and its state of advanced physical decay. Structural challenges to the podium on which it relies and of the Theatre itself mean that the Council has previously been advised that it has only a relatively short life-in-use remaining.

The Theatre also has a functioning but less than ideal level of accessibility for patrons with particular mobility needs or disabilities., necessitating arrival at different entrances and intensive staff support to get patrons to their seats.

Interventions to preserve the existing Theatre, reservice it and enable it to continue to meet current role would cost in the order of £19.9m for a refurbishment with no extension of capacity or trading potential, or more than £28m if we were to include insertion of a new balcony to increase capacity to c900, the effective maximum. Both would necessitate a closure of something approaching four years, and as discussed above, temporary theatre provision adjacent during this period would be likely to cost an additional £3m.

Neither option would generate the scale of potential economic impact or operating revenue improvement that the development of a new Wyvern makes possible.

There are also significant challenges of both condition and accessibility to Swindon Dance's occupation of the former town hall. As noted earlier in the report, few of the spaces in the building meet standards for contemporary dance, access is seriously challenging and environmental conditions and support facilities are far from those really required for such an extensive programme of training, professional development and participation. Whilst this use continues, it seriously limits Swindon Dance's growth and progress and at some point in the foreseeable future, pressures and challenges will become acute and require some resolution.

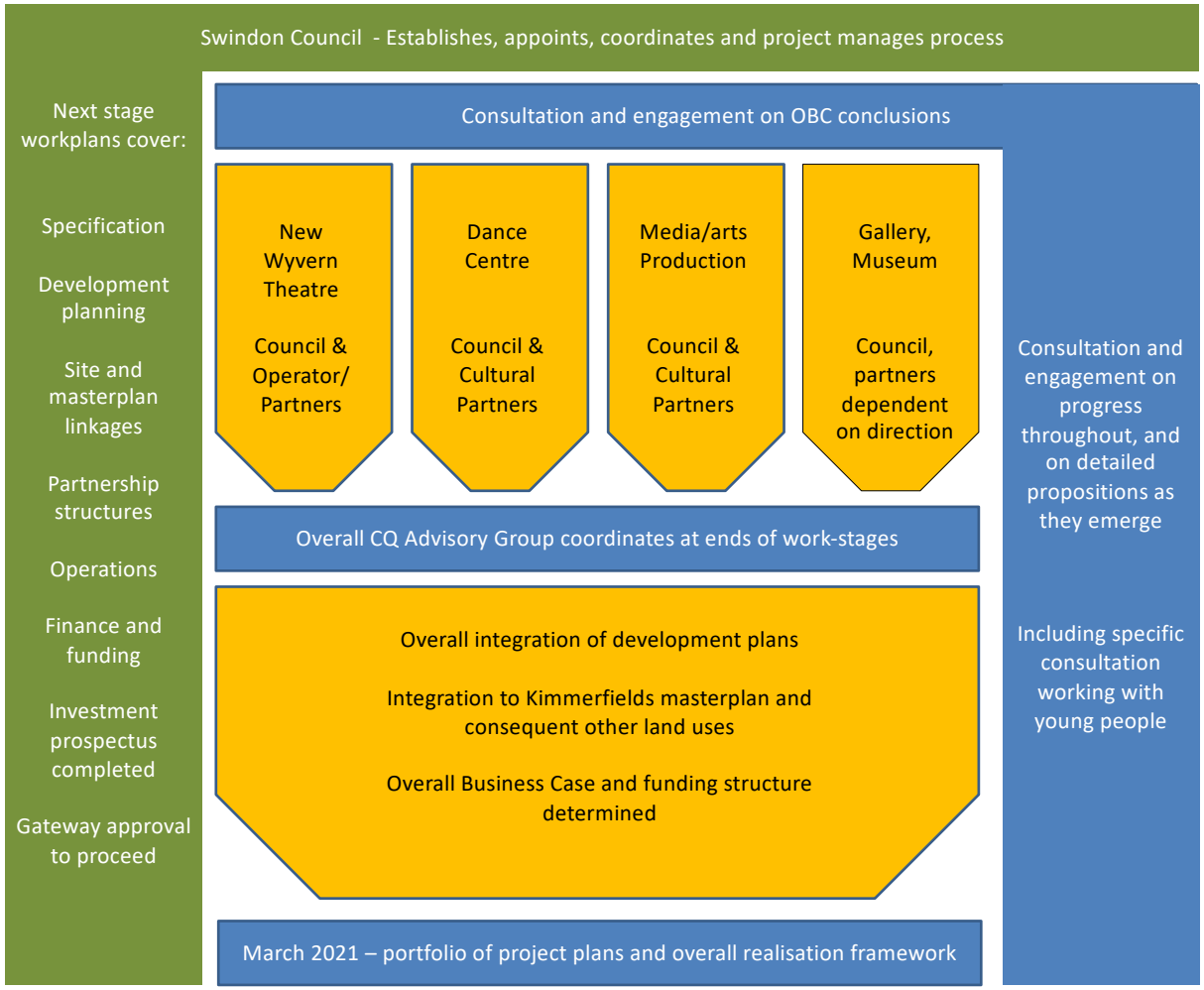
The Council has also resolved to find a solution to the challenges of its Apsley House location for the current Museum and Art Gallery. The site is 'off the beaten track' and severely limits the potential of the art collection in particular to attract out of town audiences and significant numbers of visitors. The building is inaccessible to many and there are significant challenges of condition and security for important collections. We tested and costed potential remedy to these failings and identified projects for Apsley House of values up to £7.3m were it to be retained, restored and made to work effectively.

Throughout the current built facilities, therefore, there are serious challenges to meet which will mean that, were the quarter not to be progressed, very significant investment will be required to simply keep current cultural activity going in an increasingly challenged future.

Likewise in revenue terms, there is an increasing imperative to develop more sustainable and resilient business models for the main elements of cultural provision. As public subsidy comes under greater pressure and the exigencies of response to COVID-19 make the economics of operating theatres and cultural facilities tougher, the Cultural Quarter project offers an opportunity to:

- Take advantage of the demonstrated market potential through increased capacity and trading potential
- Generate new incomes from space for growth, and from new activities such as independent cinema
- Design facilities that are more flexible and resilient in the face of challenges such as COVID-19, to avert future financial threat
- Overall to enable the reduction of Council subsidy in line with future pressure on public finance.

We can make a very strong commercial, financial and value for money case, therefore, on grounds of both positive economic impact and future viability and resilience.



4.4 The management case – delivery

As we set out in the strategic rationale for a development of discrete building block projects, one of the key advantages of this preferred option is that it significantly improves the management case for the delivery of the project.

Through this portfolio approach, we can see the development and delivery of the overall project in a series of deliverable projects which are not contingent on one another, and which can be driven by appropriate partnerships across the town and sector.

This offers a practical and achievable response to the management case challenge, where a single project of the scale and complexity that would be required to deliver on all fronts would be highly challenging to swiftly progress.

In practical terms, this approach of progressing the individual projects within a clear and coordinated single framework also helps define a manageable and pragmatic approach to advance projects toward delivery.

This might best be undertaken through the planning and commissioning of a single feasibility study workstage which would advance the more detailed understanding of the siting, design parameters, end use, partnership structure, economics, cost, funding and deliverability of the four building block projects, as shown opposite.

Among the projects, it should be recognised that different stages of detail may have been reached by the end of the feasibility stage, in respect of specificity of location and financing, but it should be intended that the purpose, scope, specification, scale and structure of post-completion operation will be clear for all four projects by the stage end.

In part this will necessitate the appointment of a consultant team comprising a lead consultant coordinating the workplan and directing the team, together with detailed input on partnerships, operation, economics and funding; a consultation specialist; an architect/urban planner; theatre designer and quantity surveyor/project management advisor.

However, the structure also presents opportunities to define roles and begin to form enduring partnerships between the Council and the specific partners who will help develop and deliver, and in some cases operate, the projects.

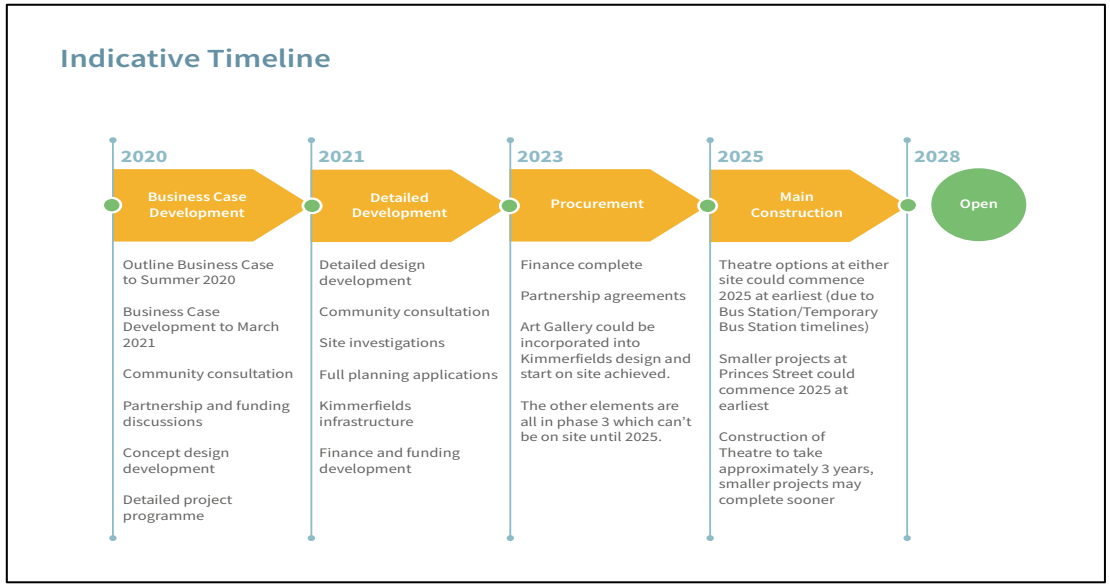
In all cases, the Council will need to provide leadership, coordination, project management resource and potentially enable funding partnerships through its own contribution and commitment; but in each case, a principal responsibility for owning and driving the project should be shared with relevant partners and in consequence the quarter project overall be a shared endeavour across the sector, town and strategic partners regionally and nationally.

4.5 Potential programme

On this basis, it seems likely that rapid progress can be achieved, such that:

- The current stage of work is completed and this report agreed during late summer 2020
- The team and resources for the next feasibility stage of work are put in place throughout August 2020
- Specialist working groups for the four project strands are identified and tasked, commencing work from September 2020
- Consultation and engagement programmes recommence, September 2020
- The parallel studies for the four projects are carried out September 2020 to January 2021
- Coordination and consolidation into overall realisation framework for realisation is achieved by March 2021
- An Investment Prospectus is delivered by end March 2021, building on the partnership and discussions with potential investors during the winter, ready to seek commitments and commissioning of the projects through 2021.

On this basis, and taking into account the opportunities and constraints on the sites, the following overall timetable should be achievable:



4.6 Potential effect of COVID-19

We are regularly in contact and discussion with clients and fellow consultants across the industry on the implications of the pandemic for both current operations and realisation of plans for renewed/new infrastructure. In respect of the Swindon project, we make a number of points and then summarise the implications as we see them for the progression of this project, and the mitigation we would expect to need to be in place to manage the additional risks arising.

In general, our assumptions are based on a set of assumptions that COVID-19 and possibly other successor viruses will be with us permanently and management and mitigation will be a permanent requirement. To some extent we expect to see permanent change to some of the economic models and patterns of production and consumption in the industry.

We do however expect that in the medium term, a 'sustainable' societal response to the virus risk will be developed and life will move over time toward at least a 'new normal'. Short term spikes or even a second wave will be disastrous for the sector in the short term, but should not derail permanently this identification of and implementation of a COVID-aware system that allows operation and economic viability to be recommenced.

- The immediate impacts of COVID-19 and the response to it have been severe for the cultural sector. Although relatively few operators have so far ceased trading permanently, the sector has been hit hard in terms of financial and organisational resilience.
- Although restrictions have eased at the time of writing, few theatres are yet re-opened for a combination of safety and broader economic factors.
- The impact has been felt throughout the supply chain and in audience demand. Currently, producers are moving toward recommencement of production, with new cultural product probably beginning to come to market from spring 2021 in most cases. We subscribe to the comprehensive national monitoring (survey) of audience perceptions of risk being operated by Indigo consultants. This tells us that whilst audience perceptions vary across cultural forms, e.g. theatre audiences are most nervousness about resumption, audiences for outdoor attractions less so, and gallery/museum goers somewhere in between, there is currently significant caution in the minds of audiences about resumption of previous patterns of gathering.
- Resumption of business has followed this varied pattern across the sector. Many outdoor and a small number of indoor attractions are now reopened and trading has generally been brisk over the last month. Audiences are showing that they value cultural opportunities reopening and that they believe COVID-19 risks can be managed in these environments. Over the last weeks, we have begun to see indoor museums and galleries reopening and here too there seems to be a generally manageable level of risk perception and good audience interest.
- Cinema has faced a frustrating couple of months. As a sector we expected cinemas to reopen quite early, and a few have. The economics of cinema exhibition are such that for the exhibitor, screenings with only a handful of customers are still essentially viable, so mitigation measures around capacity, etc., are survivable. However, we think we underestimated the impact of a 'speed bump' by which the distributors of product would hold major films back so as not to see their impact dissipated on release to a constrained market. This has in turn led to the exhibitors being reluctant to open with poor product. The beneficiaries are mainly small independent cinemas showing repertoire product. Audiences seem keen to return and to perceive risks as manageable. We anticipate that the speed bump will be a temporary effect, but that we may see slow returns to full operation extending into early 2021.

- Theatres and concert halls are worst affected, partly because of a perception of risk of spread from performance (singing in particular is facing a tough position) but also because the production pipeline is lengthy and until a significant number of producers can bring casts and crews together again to make new work or re-rehearse repertoire, and work out how to manage them on the road, operators will not have an economic basis for reopening. Amateur work faces similar challenges. Our current view is that we will see the largest number of re-openings from spring into summer 2021, but with a fuller commercial restart really not getting fully underway until the autumn season 2021.
- In terms of sector infrastructure, encouraging work is going on. Research prepared by the Environmental and Modelling Group (EMG) that reports to SAGE, and based on detailed academic work, recently (SAGE 16th July) considered guidance that not only argues that many theatres are in fact reasonably safe environments by virtue of their ventilation and filtration systems, but also identifies clearly the mitigation required to enable re-openings. Interestingly this work and design work being developed to ready the sector for the virus-future, identifies the key areas of risk not being the auditorium but in foyers, cafes, lavatories and circulation. Generally, the older the theatre the less generous these spaces and the less effective the ventilation and filtration that can be achieved.
- Our current view is that the imperative to substantially renew, or replace, aging theatres and concert halls will be redoubled by COVID-19. In the case of the Wyvern, we know that there are severe limits on cost effective and sensible remodelling in the asbestos and structural challenges and the way the theatre no longer fits the urban form. If anything, COVID-19 will urgently increase the imperative to replace with an environmentally controlled theatre with greater generosity of space in both auditorium and public areas, better connected to outdoor space and with rigorous attention to modern detail of systems to control and cleanse the environment.

For the realisation of the Swindon project we would expect that:

- COVID-19 and wider virus threat implications for building design should be identified and briefed as part of RIBA 1 and then at each subsequent design stage in line with emerging industry intelligence, guidance and regulation.
- Similarly all business and economic modelling of the individual offers should be tested in light of likely future operating conditions and the general market context of culture, leisure and town centres in the post COVID 'normal'.
- In general, though, we would expect the imperative to replace aging and environmentally/economically challenged buildings to be redoubled and the case for investment to be strengthened against the do-nothing option.
- The Council and its professional teams should put in place explicit checks and reviews at each decision gateway in respect of the degree to which the schemes are responding to emerging and progressing intelligence, challenge and guidance. Schemes should be held at gateways if it cannot be clearly identified that the scheme is addressing these, or if the guidance or forecasts against which the schemes need to be tested are not available or are contested.

Appendices

Appendix 1 Market research report
Appendix 2 Competition analysis
Appendix 3 Theatre specification
Appendix 4 Prices Street site options appraisal