

Executive summary

Overview

AEA Consulting was commissioned by Gloucester Cultural Trust in November 2018 to evaluate the case for a performing arts venue, a potential need identified in the ten-year *Gloucester Cultural Vision and Strategy 2016-2026*. Our task was to review whether the audiences currently exist to sustain a venue and whether there is a potential supply of programming suitable for those audiences. The central concept we were asked to explore was of a performance venue of around 1,000 seats that might also be suitable for – and therefore financially supported by – complementary use as a conference venue.

Our conclusion, which is supported both by the evidence in the body of this report and by Britain's broader experience of successful and unsuccessful capital projects in the cultural sector, is that the 'pre-conditions' for a successful venue need first to be fostered; and that the fostering of those pre-conditions will give greater definition to – and enhanced prospects for – a successful facility: a well-articulated mission; clear leadership behind the project; active, regular and engaged audience for the arts; strong partnerships on the regional and national level and clear funding strategy in addition to identifiable sources of capital and revenue funding. We have made recommendations on fostering those pre-conditions, all congruent with the *Cultural Vision and Strategy* including investment in existing assets, and in particular the Guildhall.

Context

We are in a period of rapid change in the cultural sector – in the ways in which art is created, in the channels through which it is distributed, and in the context in which it is enjoyed. Demographics, technology, the way we use our leisure time are all affecting the physical context in which we are engaging with the arts. Trends in cultural production and participation in the UK and elsewhere, for example, show a strong leaning towards innovative and creative use of non-traditional spaces to present, produce, and enjoy the arts. This is encouraging more diverse forms of artistic expression and contributes to preserving the city's heritage assets, and utilisation of otherwise empty property ('meanwhile' or 'found' spaces are often adapted for arts or cultural use). Gloucester can pursue a number of opportunities on these fronts as it prepared the ground for a new, permanent facility.

The analysis of the recently built or expanded regional arts centres in England reveals the wide range of capital costs involved – from £0.5 million for the redevelopment of a smaller historic building, to £5.3 million for the refurbishment of a 40-year old arts centre; to £61 million for a newly built large-scale theatre of 1,100 capacity. Perhaps more importantly, the operating budgets for a broadly analogous cohort of regional arts centres range from £1 to £12 million a year. (For further detail on the arts centres case studies, see Section 3.)

The sources of funding for capital projects are changing, with the public sector in retreat after the formidable wave of investment from the national lottery bodies and European Structural funds. Private philanthropy is increasingly significant, and developers are seeing the benefit in using culture as a definitional aspect of mixed-use developments. These opportunities also need time to identify and foster. A clear consensus about a programmatic need – or desire; supporting audiences; and a coalition of civic, business and cultural champions – are needed to secure that support.

Summary of analysis

1. Arts and culture sector growth is embedded helpfully in Gloucester's master planning and city strategies, pointing to the increasing role of culture in the city's economic and social development;
2. The current provision of physical infrastructure dedicated to the performing arts is limited but expanding; and
3. There is a limited but growing number of performing arts organisations, festivals, and events in and around Gloucester.

However...

4. Arts participation in the city is low: investing in audience development is essential to encourage cultural participation. The low participation is demonstrated by the attendance data (low attendance levels at current venues); the audience's inclination to seek entertainment elsewhere (as stated in recent public consultations and the stakeholder consultation completed as part this analysis); and the demographic data pointing to limited levels of disposable income available to the local residents (especially in more deprived areas of the city).
5. There is no clear consensus yet among the stakeholders consulted, or the public, on the immediate need for a new performing arts venue in Gloucester or its specifics;
6. There is no easily identifiable prospect of capital funding.

Meanwhile, there is clear evidence of...

7. Demand for 'soft' live events infrastructure and accommodation for artists and visitors to support current producers and presenters;
8. A need to develop and retain talent to fill the skills gap in cultural management and leadership and artistic production;
9. A desire for a signature cultural hub for the city in the long term, with a focus on creative learning, live performance, accessibility, and flexibility.
10. Some promising commercial potential in a new venue.

These findings (fully explored in Section 2 of this report) suggest it is premature to embark on developing a new cultural venue for Gloucester but that the demand and capacity for a dedicated new arts venue in Gloucester can be grown.

Next steps

The **recommended steps** (outlined in Section 4) towards building professional capacity and demand for the arts in the city that would instigate the demand for expanding the cultural infrastructure and, ultimately, the development of a new cultural venue, is to:

- Implement audience development initiatives to build arts and cultural participation in Gloucester;
- Leverage existing and new partnerships for capacity building, professional development, cultural leadership, and to maximise existing resources;
- Improve the Guildhall's professional and physical standard;
- Increase utilisation and efficiency of existing and vacant spaces;



- Focus efforts on young people as both cultural producers and consumers;
- Revisit the case for a professionally-operated multidisciplinary arts centre once the factors predetermining the demand are in place: Gloucester's existing venues reach their capacity, there is a thriving and sustainable arts sector in the city with sizeable audience base, and there is a significant evidence behind the demand – both from the audiences and producers/promoters – for expanded cultural infrastructure. We have suggested specific milestone metrics corresponding with recommendations in this report in 4.39 of Section 4.