

# Prospective theatre provision in Ashford

A report for Ashford Borough Council

December 2018



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## 1 Executive summary

Fourth Street was asked to examine the case for the provision of a theatre in Ashford borough, and in the town of Ashford in particular.

The following points emerged from our research:

- A. The development of a new theatre in Ashford has the potential to align with the Council's strategic objectives and priorities. It is recognised by the Council that Ashford's cultural infrastructure will need to develop further to reflect its population growth and changing demographic.
- B. Ashford town is the obvious location for a new purpose-built theatre in the borough. It is by far the largest town and is centrally located. Compared with other towns in Kent, Ashford is arguably underprovided in terms of cultural facilities. Ashford is one of the minority of boroughs in Kent without a theatre of at least 400 seats.
- C. Ashford is growing fast, and its population currently has moderate levels of engagement with the arts. Within that, however, theatre is the most popular artform, with tastes tending towards more traditional, mainstream productions.
- D. Ashford borough has some provision at the smaller end of the scale for mixed arts programmes at Revelation in Ashford and the Sinden Theatre in Tenterden. We understand that Ashford School has ambitions to build a 250-seat Performing Arts Centre at some point, which would include a theatre that could be used by the wider community.
- E. Any large-scale theatre (1,000+ seats) would compete directly with Canterbury and Tunbridge Wells – and, of course, London, which is easily accessible from Ashford. A new 1,200-seat theatre is being developed in Tunbridge Wells to replace its existing 1,000-seat venue. It is due to open in 2022.
- F. The 'critical friends' group that has been discussing the future of the arts in Ashford favours a mid-sized venue – of say, 400-700 seats – and this is the size of venue that Ashford Borough Council has said in earlier strategy documents that it aims to work towards. However, this is not without risk. At this size, the venue is likely to be largely a receiving theatre rather than a producing one, and recent Arts Council research suggests that the touring circuit for mid-sized venues is difficult at present, with a shortage of suitable content.
- G. Mid-sized venues also typically have a very mixed programming offer including music, comedy, spoken word and 'event' cinema screenings as well as theatre. That could be problematic for Ashford, where the sustainability of a new venue would thus require it to compete directly with other local organisations like Revelation or the new Picturehouse cinema. A mid-sized venue in Ashford would need to be a multifunctional hub, with other ways to generate footfall and boost income (e.g. conferencing, exhibitions, etc.) (These 'non-cultural' uses would need to be examined in more depth were this the favoured size option.)

- H. In arriving at a recommendation, we have taken account of this market context and considered the potential economic impact of different types of theatre. There is no question that a large theatre of 1,000+ seats – assuming it is professionally run and assertively programmed – would have the largest *direct* economic impact, measurable in new jobs and additional spend in the town centre. But viability would be a challenge, as the market risk would be higher than it would be for a smaller venue. Large theatres are invariably sustained by touring West End transfers, so its programming would do little to differentiate Ashford from other towns that are all offering the same slate of productions. More importantly, a large theatre that serves primarily as a receiving house for national or regional tours would do little – in our view – to support the indigenous arts and cultural scene that is steadily growing stronger and is more distinctively *of* Ashford.
- I. Our preferred option is that, in the short-to-medium term, Ashford concentrate on a 250/300-seat purpose-built theatre. This could be tested through a temporary solution, which would work at that scale. A theatre of this size would also afford the opportunity to nurture and grow the local amateur dramatics scene and strengthen the wider creative ‘ecology’ in the town, with its current mix of small-scale and temporary venues and spaces.
- J. Such a building can still be architecturally striking – there are many examples from elsewhere of new-build theatres of around this size that are architectural and placemaking features for their host communities. With a smaller capacity to fill, it can take more chances with its programming than larger venues, creating a locally distinctive offer: theatres of a similar size sometimes run outdoor event or festival programmes, for instance.
- K. In any event, Fourth Street would advise the Council to liaise with and, if appropriate, coordinate the delivery of any purpose-built theatre with Ashford School, which already has ambitions to deliver a 250-seat theatre for mixed school and community use. While we believe there is ample market demand to justify a purpose-built theatre, having two of a similar scale in the town would expose them both to significant market risk. It may therefore be sensible to explore some form of joint delivery, provided that appropriate terms were negotiated to assure genuine community access.

Finally, it should be noted that these points reflect the current market and demand for theatre in Ashford, and do not take into account the future ambitions and financial commitment of the Council.

## 2 Introduction

Ashford is a fast-growing, mid-sized town in Kent that benefits from a central location in the county and good transport links. It is the largest urban area in the Ashford local authority borough, with a population of almost 75,000 at the 2011 census. The rest of the borough is largely rural, with a mix of small towns and villages.

The Borough Council is keen to ensure that the town's infrastructure is appropriate for such a rapidly expanding and evolving place. The town's cultural infrastructure is an important part of this. Cultural buildings and activities have an intrinsic entertainment value, but can also help animate town centres, attract visitors, contribute to community cohesion and generate economic impact. A successful cultural 'offer' could therefore help Ashford Borough Council achieve several of its wider ambitions for the town.

This study focuses on theatre provision. This has been prompted, in part, by a petition to the Council asking it to consider the case for a new theatre in Ashford, which currently has no permanent purpose-built theatre.

Fourth Street has been commissioned to examine both the need for such a facility, in the context of likely demand from residents and visitors, and the supply of such facilities elsewhere in Kent (and further afield). The report will set out possible options for how theatre provision in Ashford might be improved over a 5-year horizon.

The scope of this work is a broadly 'macro' determination of *need* and *demand* – it is not site-specific and the relative strengths or weaknesses of particular development opportunities have not been considered. We have, however, liaised with consultants undertaking parallel research into the viability of a theatre in the Mecca Bingo Hall building on the High Street. We understand that the prospect of that space satisfying the town's need for a theatre is unlikely.

## 3 Background and policy context

### 3.1 Economic background

Ashford borough has been designated an area for growth (or an equivalent term) by the Government since the 1960s and has seen its population rise considerably over time. At the time of the 1981 census the borough had 86,700 people; the local authority area is now home to around 127,500 people.<sup>1</sup> Of these, 60% are of working age (16-64), slightly lower than both the South East (62%) and national averages (63%).

Among the borough's working-age population, 81% are economically active, the same percentage as for the South East as a whole. (The national average is 78%.) However, unemployment was a little higher than in the South East more generally (4.0% v 3.5% in the year to June 2018).

The occupational structure of Ashford is rather different from the South East's and the country as a whole. Only 37% of employed residents fall into major groups 1-3 (managers and professionals) compared with just over 50% in the South East and 46% nationally. Ashford's workforce is disproportionately found in administrative, secretarial and skilled trades – 28% compared with 20% in the South East and across the country as a whole. In part, this is a reflection of the education levels of Ashford's working-age population. Only 24% have an NVQ4+ qualification (in other words, degree-level qualifications or above) compared with 41% in the South East and 39% nationally.

As these figures might imply, Ashford residents generally earn less than those across the South East more widely, having a gross weekly pay of £575, versus the £615 of the South East. However, earnings by place of work in Ashford are only £544 a week, indicating that the higher gross pay of residents is being achieved by some residents commuting out of the borough to higher-paid jobs.

The total number of employee jobs in Ashford borough was estimated to be 56,000 in 2017. Compared with South Eastern averages, Ashford borough was disproportionately strong in manufacturing, wholesale/retail, and health and social work. It was weak in information and communication, and professional, scientific and technical jobs.

Much of the success in wholesale and retail is fuelled by the borough's transport links. With its access to the M20, the A20, the A28, the HS1 rail link, as well as domestic rail services, the borough (and the town of Ashford in particular) has become a hub for such activity.<sup>2</sup>

The most recent population projections from the ONS,<sup>3</sup> published this year, suggested that Ashford's population will rise by 10.0% between 2016 and 2026. This growth rate is faster than that expected for England (5.9%), the South East (6.4%), Kent (8.2%) or even London (8.8%). Within Kent only Dartford and Swale are predicted to grow faster than Ashford over this time period.

<sup>1</sup> All the data that follows in this sub-section is drawn from Nomis's Labour Market Profile for Ashford borough, accessed 25 Oct 2018, unless otherwise stated.

<sup>2</sup> Shared Intelligence (2010) *Ashford Strategic Economic Framework*

<sup>3</sup> Office for National Statistics (2018) *2016-Based Subnational Population Projections*

### 3.2 Policy and strategy context

Ashford Borough Council has an Arts Strategy, dating from 2010. This was a response to an arts ‘manifesto’, *Grow the Arts*, put forward by local artists. The Strategy’s Vision was that “by 2021, the arts in Ashford is seen as thriving and well connected. Where communities are involved, enthused and proud to be part of our cultural life.”

The Strategy had three ambitions to enable the Borough Council to achieve this. They were to:

- provide spaces to enrich the local arts scene, develop civic pride and arts appreciation.
- be seen as an arts destination with a strong connected local arts scene.
- have a creative buzz, where the arts are valued and recognised as being part of everyday life.

The Strategy foreshadows what has since become Revelation at St Mary’s Church, but also acknowledged the calls for a larger arts venue in Ashford. However, it argues that “it [a large arts venue] will only be possible through the opportunity that growth provides. It is preferred that we look to mend and extend the buildings and spaces that we’ve got to provide medium scale flexible spaces dedicated for performance and visual arts.” One of the five-year goals of the Strategy was therefore to try to secure investment to provide a medium-sized arts space for the borough.

Ashford borough’s Sustainable Community Strategy (2008-18) has as one of its themes, Enjoying Life, and recognises that Ashford has a “thriving cultural life”. It goes on to note that it is important to ensure “adequate additional facilities are provided and that all parts of the community have good access to them”. It states that “It will also be necessary to ‘raise our sights’ and secure new facilities, particularly arts and cultural facilities that can respond to the aspirations of the growing community.”

The section then makes three ‘responses’ on behalf of the Ashford Partnership. The second of these is shown below:

*In particular, we will put additional effort into building up arts and cultural opportunities, developing arts programmes, building audiences and demonstrating the need for new facilities. We aim to provide a new arts/cultural venue in the town centre in the short term. We will work towards the provision of a major new sub regional cultural venue that will transform Ashford’s cultural offer*

Both the Arts Strategy and the Sustainable Communities Strategy predate the austerity measures that have constrained local government funding. A more recent set of insights was provided in 2016, when Ashford Borough Council commissioned a report to provide a perspective on arts and cultural industries in the borough, to inform the Local Plan.<sup>4</sup> Fifteen arts and creative industries stakeholders were interviewed as part of the research, leading to the following key findings:

- There appears to be a high level of regular amateur arts activity taking place in the Borough, although this needs benchmarking to be sure of its relative significance.

<sup>4</sup> James Kennell Associates (2016) *Arts & Cultural Industries Strategy Report*

- Some respondents identified a lack of local capacity for hosting, promoting, and working with professional arts organisations.
- A lack of available space for rehearsal and performance in the town was consistently identified.
- Many organisations felt that their work was not sufficiently promoted as part of the life of the Borough.
- Many organisations felt that the council did not adequately support arts activity.
- Some organisations identified the need for greater ambitions for arts and culture in the Borough in terms of facilities and projects.
- A multi-purpose arts facility in the town centre was universally recommended.
- Local parking and transport links were identified as a brake on arts development.
- Poor signage and local promotion were identified as problems for arts development.

The findings of the report suggest that the improvements made to the borough’s cultural offer since the launch of the Arts and Sustainable Communities Strategies – notably, the opening of Revelation in Ashford – have not fully met the perceived demand for space and profile for the arts in the town.

Ashford’s cultural offer is also shaped by its County Council. Kent has a cultural strategy covering 2017-27.<sup>5</sup> The strategy sets an ambition to see “more people engaging with, experiencing and being inspired by, excellent arts”. It also draws attention to the economic value of culture, describing it as “a key driver for the prosperity of the county”. However, the strategy recognises that the increased growth of the local population means that, although the county has some “emerging companies alongside comparatively small and geographically dispersed creative clusters” it will need to build on these “to establish greater critical mass”.

The strategy then sets out a series of ambitions. Those with relevance for Ashford include:

- Enhance and invest in the cultural infrastructure where there is proven potential for growth.
- Support and nurture creative, cultural and heritage professionals to deliver excellence through production, commissioning and programming.
- Pursue investment opportunities to enable cross-sector collaboration and risk taking.
- Support new formats and mediums for cultural production and experiences.
- Embed culture and the creative economy firmly within Kent planning frameworks, ensuring that cultural provision and inspiring design is at the heart of all new developments and integral to the growth of strong, resilient and successful communities.
- Expand Kent’s cultural tourism offer, to grow the visitor economy further through enhanced connectivity and innovation.

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<sup>5</sup> Kent County Council (undated) *Inspirational Creativity: Transforming Lives Every Day: Our cultural ambition for Kent* (Cultural Strategy for Kent 2017-27)

### 3.3 Theatre in England

A 2014 report for Arts Council England<sup>6</sup> examined the state of the theatre sector in England. Although much of its detailed financial analysis focuses only on theatres that are national portfolio organisations (NPOs), it made a large number of other observations, some of which are summarised here. While these are national trends, they may have some implications for Ashford.

The report noted that consultees thought that the theatre sector had become more ‘marketised’ (i.e. less able to depend on public subsidy) in recent years. This was believed to favour large, urban, and well-funded organisations in particular. The report found that among NPOs, large organisations (51+ permanent staff) generated 78% of all earned income, compared with 21% for medium-sized organisations (10-50 staff) and 1% for small ones (under 10 staff), despite the ‘small’ group accounting for 25% of the sample. Earned income also grew by the greatest amount across large NPOs, with a similar pattern existing for contributed income.

London dominates the sector in terms of output, accounting for 47% of all performances (in 2014), 43% of venues, and just over 50% of all attendances, reflecting its wide appeal: 43% of London ticket sales were to people who live outside the capital (either international tourists or residents of other parts of the UK). Outside London, the report found that attendance was concentrated in major urban areas, as well as affluent smaller cities and towns. Drama and musicals dominate in terms of genre. Older audience groups still dominate audience-going, but younger audiences are growing fastest.

Proximity to venues (along with overall population size) matters. It “appears to explain some of the divergences in theatre attendance. In most regions, there is a rough alignment: the regions that have the highest shares of venues (e.g. London and the South East), also have the highest share of attendances.”

The move to marketisation and other trends (such as a number of large capital projects) is leading to the emergence of a ‘super-venue’ touring circuit for large-scale productions – locations that can host the biggest shows and have high occupation rates. Touring has nonetheless become more challenging at all scales and for mid-size venues it has become particularly problematic:

*“The perception is that most middle-scale touring is squeezed between, on the one hand, the spectacular productions available at the large scale, and the intimacy offered by the studio on the other.”*

Small-scale touring is often non-commercial and based on “strong and often innovative collaboration”, such as the ‘house’ network developed by Farnham Maltings in the South East and East of England.

The sector is increasingly interested in audience development work, which tends to start at a grassroots level and grow over time. The ACE report notes: “theatres’ increasing focus on their local communities and social functions, and of theatres achieving a cultural purpose within a broader set of civic responsibilities.”

<sup>6</sup> BOP Consulting and Graham Devlin Associates (2016) *Analysis of Theatre in England*, Arts Council England

### 3.3.1 Frequency of arts attendance

Levels of arts attendance have remained broadly steady at the national level for more than a decade, according to the DCMS's Taking Part Survey. Within this, around a fifth of the adult population of England attended a play/drama (21.4%) or a musical (19.9%) in 2016/17. These were the second and third most attended artforms, behind 'other live music events'. However, attendance at such shows is relatively infrequent. The survey found, for example, that 60% of adults who had been to a play/drama in the last 12 months had done so just once or twice in the year, with the same being true for 74% for those who had been to a musical. As might be expected, the figure was even higher for pantomimes, where 84% of attendees went only once in the year.<sup>7</sup>

Data from the box-office data company, Spektrix confirms this trend. Its benchmarking of its UK and Ireland clients (a mix of arts centres, presenting, producing and community venues) suggests that 77% of those who booked in 2016 only attended their chosen venue once, while 12% did so twice and 11% three times or more.<sup>8</sup>

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<sup>7</sup> DCMS (2018) *Taking Part focus on: Arts*

<sup>8</sup> Spektrix (2018) *Spektrix Benchmark Report 2017*

## 4 Market analysis

This section looks more closely at the market context in Ashford.

### 4.1 Demand

This first section of the analysis explores the potential demand for a theatre in Ashford town.

It is the largest town in the borough and has never had a permanent theatre large enough for professional productions. However, it should be noted that the borough does have a theatre space, in Tenterden. The 231-seat Sinden Theatre is owned by Homewood School but is used by the local community as well.

Ashford's excellent transport links means that a sizeable proportion of Kent's population lives within 30 minutes' drive of Ashford town centre – around 455,000 people. This is almost four times the population of Ashford borough itself. The drivetime area stretches from Maidstone in the north-west, south as far as Romney Marsh and Folkestone and east to Canterbury and Dover.<sup>9</sup>

Figure 1: 30-minute drivetime from Ashford High Street



<sup>9</sup> Fourth Street also looked at sixty-minute drivetimes from Ashford town centre. This takes in an even larger catchment area, covering almost all of Kent, along with parts of East Sussex and south and east London. In all, 2.55m people live within an hour's drivetime of the town centre. Given, however, that cultural venues of the size under discussion here tend to attract the bulk of their audience from within a 15-20 minute radius, and that the demographics of London's population are very different from those of Kent, this report has chosen to focus on the 30 minute drivetime analysis.

Prospective theatre provision in Ashford

This market catchment is reasonably prosperous, with proportionately more people in the higher income bands than the national average, apart from in the two highest income bands (£100,000+). However, the largest single household income band in the Ashford drivetime area is a more modest £20,000-£29,999.

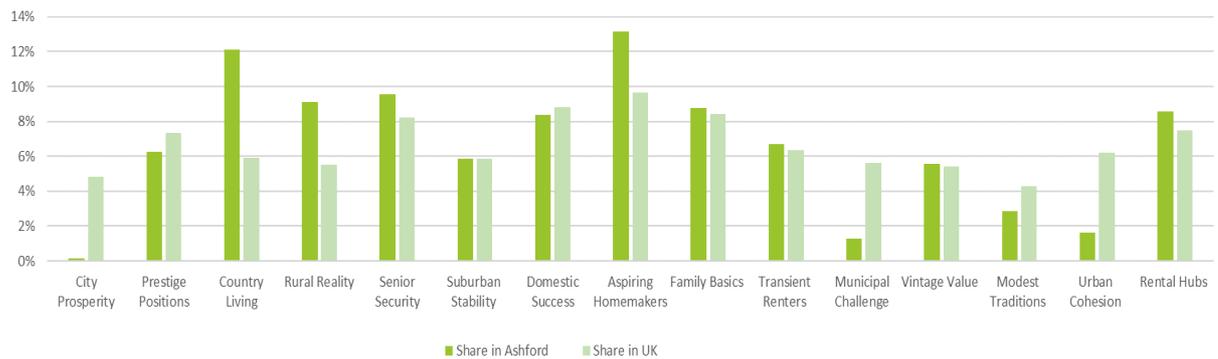
**Figure 2: Share of population by income band for Ashford drivetime area and UK**



Source: Experian 30-minute drivetime analysis

In terms of market segmentation, the catchment includes representatives from all of the Mosaic UK categories, but the most significant are: Aspiring Homemakers; Country Living; Senior Security; and Rural Reality. These are ‘overrepresented’ in the Ashford drivetime area, compared with the national average.

**Figure 3: Share of population falling into each Mosaic category, Ashford and UK**



Source: Experian 30-minute drivetime analysis

The consumer profiles associated with these four categories are described in the Annex.

### 4.1.1 Audience Agency analysis

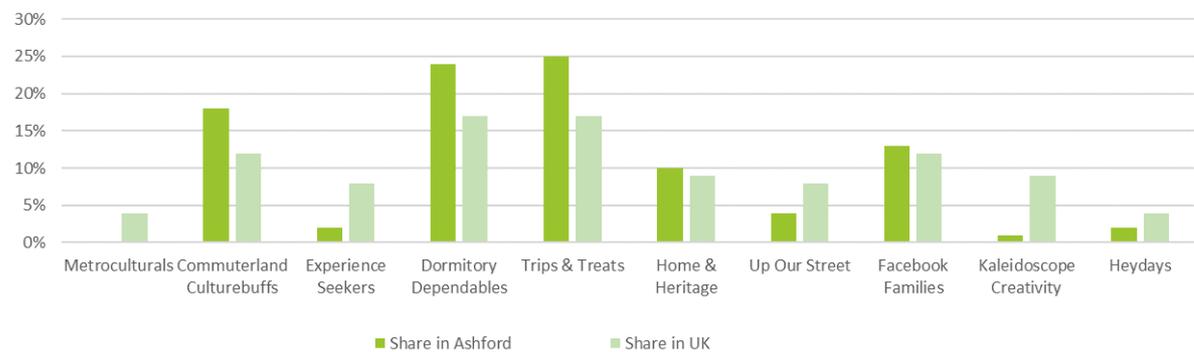
A second source of insight into demand comes from the Audience Agency. It too has an audience segmentation tool, Audience Spectrum, which focuses on the cultural tastes of various segments of the

population. This is derived from a number of sources, including Experian data, the 2011 Census and the DCMS's Taking Part Survey.

On the Audience Agency 2014 Area Profile for Ashford (for 30 minutes drivetime)<sup>10</sup> the Ashford area had concentrations of Trips and Treats, Dormitory Dependables and Commuterland Culturebuffs that are well above the national average, and two groups, Home and Heritage and Facebook Families, that are slightly more common in Ashford than nationally.

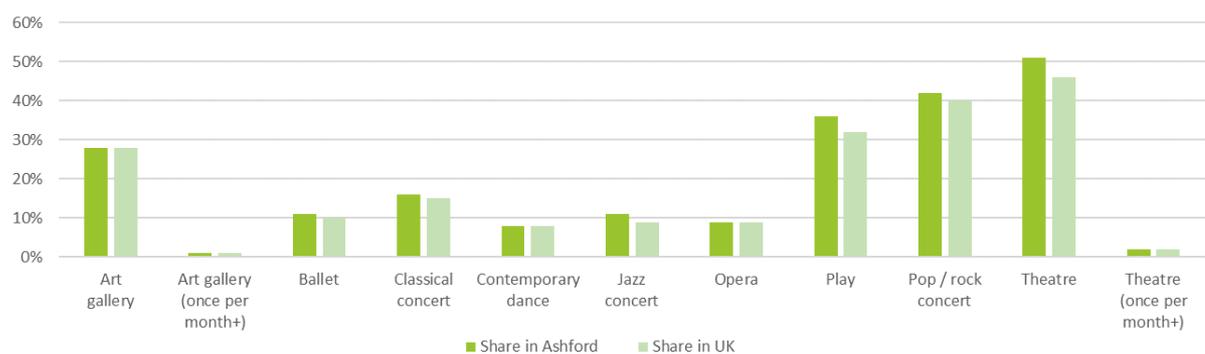
Of these, Commuterland Culturebuffs – the third largest group in Ashford – have high levels of engagement with the arts, while the others have moderate/low levels of arts engagement. All five generally have fairly traditional, mainstream tastes. The Audience Agency category with the highest level of arts engagement, Metroculturals, are entirely absent from Ashford.

**Figure 4: Audience Spectrum segmentation: share of population in Ashford and the UK**



Source: Audience Agency area profile

**Figure 5: Percentage of adults attending artform in the last 12 months, Ashford and UK**



Source: Audience Agency area profile

Audience Spectrum suggests (see Figure 5) that the drivetime area's pattern of cultural consumption is similar to the England averages for most artforms. However, the local population is already somewhat

<sup>10</sup> Audience Spectrum draws on a number of sources, including 2011 census data. Thus, although this evidence is four years old, it is unlikely to have changed significantly in the meantime. This Fourth Street report includes separate, more up-to-date figures from some of the other components of Audience Spectrum, such as Experian data and the DCMS Taking Part survey, where possible.

more likely than average to attend concerts, plays and live theatre. Those market segments are likely to grow in line with Ashford’s population growth, especially if it continues to attract culturally active professionals migrating out of London.

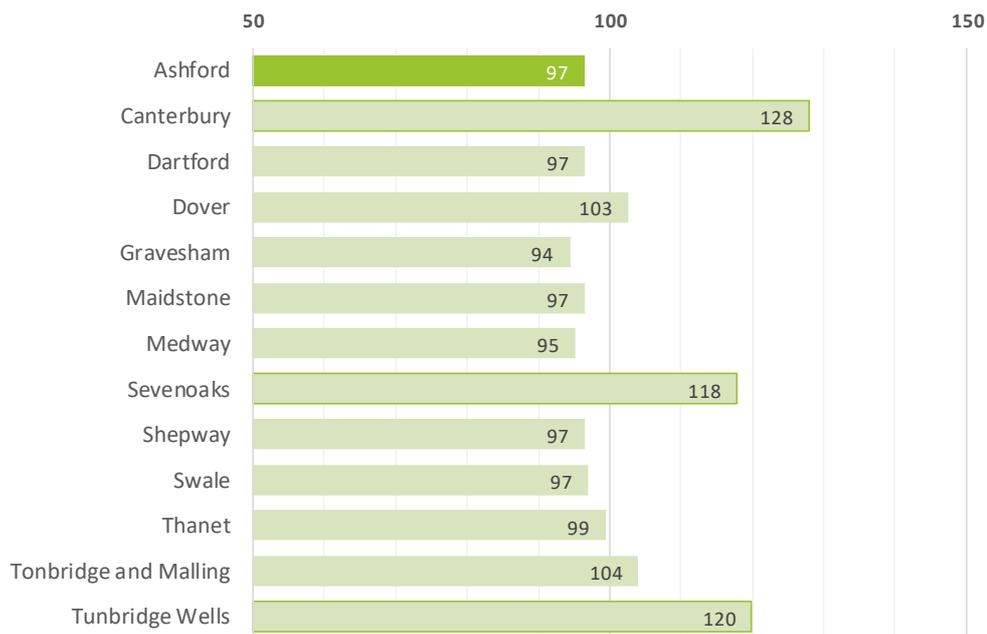
#### 4.1.2 Active Lives survey

The DCMS’s Active Lives survey provides another source of evidence on cultural engagement. It uses a somewhat different methodology from the DCMS’s other survey on this subject, Taking Part, but it is sufficiently large that it is able to present information at local authority level, and therefore allows comparisons to be made across Kent. It measures (among other things) overall arts attendance and the frequency of such visits, though not attendance rates at individual artforms.

According to the Active Lives survey, some 50% of adults living in Ashford Borough attend an arts event at least once a year. As shown below in Figure 6, this is marginally below the UK average, but consistent with most other local authority areas in Kent. Residents of Canterbury, Sevenoaks and Tunbridge Wells show a much higher propensity to attend arts events, which is in part likely to be a reflection of the richness of the offer in those towns.

**Figure 6: Attendance at Arts Events by Borough in Kent<sup>11</sup>**

(Index, UK average = 100)



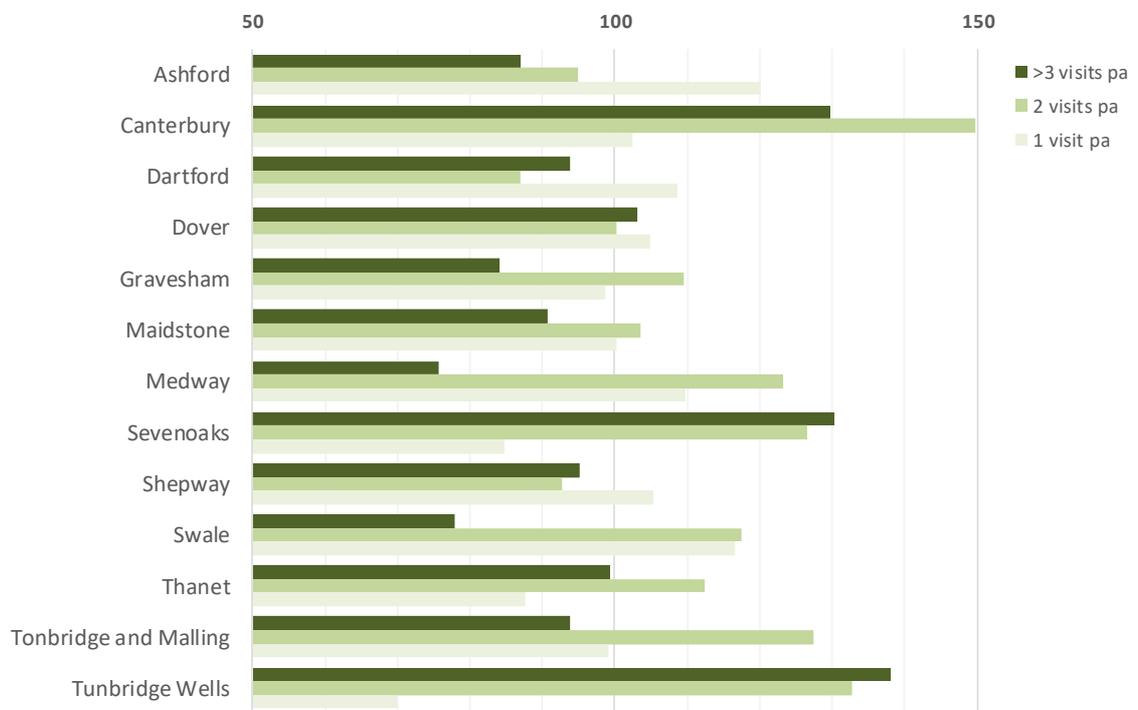
Source: DCMS Active Lives survey

<sup>11</sup> Note that in 2018 (after the data in Figures 6 and 7 was collected) Shepway district changed its name to Folkestone & Hythe district.

Although the propensity of Ashford residents to attend arts events is broadly similar to most of the rest of Kent, it is interesting to note that among those residents that do attend arts events, the frequency of attendance is markedly lower than in the rest of the county. To the extent that people in Gravesham, Maidstone, Thanet or Medway participate in the arts, for example, they are more likely than the national average to attend two or more events per annum, whereas in Ashford they are much less likely to do so (Figure 7). This could be indicative of a lack of opportunity to attend arts events in Ashford and might therefore signal a latent demand for more provision of arts events and facilities.

**Figure 7: Frequency of Attendance at Arts Events by Borough in Kent**

(Index, UK average = 100)



Source: DCMS Active Lives survey

## 4.2 Supply – Ashford borough’s arts and culture ‘ecology’

### 4.2.1 Current and planned venues/companies in Ashford

With these points in mind, the next section discusses Ashford’s current (and planned) cultural offer – in other words, the ‘supply’ of culture available to residents. It begins with the ‘professional’ offer before turning to amateur activity.

**Figure 8: Key Venues and Companies in Ashford**

<p>Revelation Ashford (St Mary's Church)</p>	<p>A music and arts venue in the town's historic St Mary's Church. (The church is still used for religious services too.)</p> <p>Established in 2011 with ABC support and managed by the St Mary's Arts Trust. Its main space can hold up to 350 people, and its current programming consists of comedy and music – both up-and-coming acts and tribute bands. It won 'Cultural Venue of the Year' at the Kent Creative Awards 2017. The venue receives some ongoing revenue funding from ABC.</p> <p>As a church-based venue there are some restrictions on the type of show it can host. Comedians who swear, for example, are not booked at the venue. There is also a perception it does not work well for theatre, especially more intimate performances, for which a studio theatre space might be better. Revelation's office and administration facilities are also felt to be poor.</p> <p>Revelation's audience is mostly local. In 2014, Kent supplied 90% of the audience, with Ashford town accounting for 43%.</p>	
<p>Jasmin Vardimon Company</p>	<p>A contemporary dance company founded in London in 1997. It is highly regarded, touring nationally and internationally, and became an Arts Council England Regularly Funded Organisation (now known as a National Portfolio Organisation) in 2004.</p> <p>ABC persuaded the Company to re-locate its production base to Ashford in 2012, and it now operates from its Production Space at the Stour Leisure Centre.</p> <p>It does not publicly perform in Ashford. The primary venue in Kent that it seems to use for performances is the Gulbenkian Arts Centre in Canterbury.</p>	
<p>Sinden Theatre, Tenterden</p>	<p>A 231-seat venue located in the grounds of Homewood School (an academy school) in Tenterden. It opened in 2004. As well as regular school productions, it also hosts commercial productions, especially of stand-up comedy, music and drama.</p> <p>Examples of acts performing this year include The Fureys, Roy Orbison and Buddy Holly tribute acts, and Ann Widdecombe. The theatre is also used more widely by its community: it takes private bookings from local stage schools and drama groups as well as being available for corporate or conference hire. It runs a pantomime for three nights in late December.</p>	
<p>Ashford Arts Centre</p>	<p>KATFM (Kent Arts, Theatre, Film and Music) is a not-for-profit company that manages rehearsal and performance spaces for micro-businesses in the creative sector in Ashford town centre. Its building, the Ashford Arts Centre (in Park St), aims to use entertainment to promote literacy, inclusion and diversity while providing jobs, work experience and training, especially in the performing arts. Established in 2015, the Arts Centre allows its members to learn a range of skills and join clubs to organise live events and film projects</p>	

**Figure 9: Planned Venues in Ashford**

<p>Ashford School at East Hill</p>	<p>The planned (ten-year) expansion of Ashford School (an independent school) on East Hill is intended to create a number of additional facilities.</p> <p>One of these is a proposed Performing Arts and Design Centre in a redeveloped Pledges Mill, on a central site in the town. According to its website, the development would provide “a signature building with state-of-the-art facilities and space for the school to grow. The Centre will contain a 250-seat professionally equipped theatre, gallery, reception area and exhibition space. The Centre will be used for 52-weeks a year and would be open for use by the local community in Ashford.”</p> <p>At this point, it is unclear if or when the Centre will be realised, or the degree of access community groups will have.</p>	
<p>Picturehouse Cinema / Elwick Place</p>	<p>A new six-screen Picturehouse cinema is due to open in Ashford town centre by the end of this year, as part of the Elwick Place development.</p> <p>If its programming is typical of other Picturehouses, it will show a mix of independent and arthouse films and ‘event’ cinema, such as performances broadcast from the National Theatre or the Royal Opera House. According to its website, the Elwick Place scheme will also include “attractive new public space for events and gatherings”.</p>	
<p>Coachworks / Dover Place Scheme</p>	<p>The Dover Place site (the former home of the Ashford Youth Theatre) is being redeveloped as the Coachworks. It is ultimately intended that the site will become part of the Commercial Quarter in around five years’ time, but in the interim, a mixed-use campus called The Coachworks is being developed on a ‘meanwhile’ basis, with co-working space, a flexible indoor/outdoor event space and a food and drink offer. The Borough Council has indicated that the event space might be used for theatre performances, cinema and live sport screenings.</p>	

### 4.2.2 Amateur activity in Ashford

While Ashford town does not have a professional theatre, it and the villages around it do have some amateur theatre groups; indeed, the critical friends group believe such activity is relatively strong in the Ashford area. Examples include the Ashford Theatre Society, an amateur society that performs at the Christ Church Community Hall on Beaver Road, and children’s groups such as Stagecoach Theatre Arts, based at the North School in Essella Road, and Theatretrain Ashford, which meets at the Centrepiece Church on Bank St.

One of the most notable groups was the Ashford Youth Theatre, which despite its name involved people across the age ranges and had been active for many years. The Youth Theatre used to be based at Dover Place but has had no permanent home since development began there. Its materials and equipment are currently in storage, and the Theatre does not stage productions at present.

### 4.3 Review of other venues in Kent

Ashford borough cannot be viewed in isolation, however, especially in view of its good transport links. This next section therefore considers the offer in other boroughs in Kent.

### 4.3.1 County-wide supply of cultural space

The table below shows the population of the borough (and one unitary) councils in Kent, along with the largest theatre in each, the year in which the venue opened, and the town in which it is based. Ashford's population places it near the middle in Kent by size: smaller than Medway (the unitary), Maidstone, Canterbury and Thanet (among others), but bigger than Dartford, Gravesham or Tunbridge Wells.

**Figure 10: Theatres in Kent**

Local Authority	Population 2017 (mid-year estimate)	Location	Capacity of largest theatre	Opened
Medway	277,600	Chatham	965	2000
Maidstone	167,700	Maidstone	400	1955
Canterbury	164,100	Canterbury	1,200	1984
Swale	146,700	Faversham	98	1992
Thanet	141,300	Margate	1,400	1911
Tonbridge & Malling	128,900	Tonbridge	380	2000
Ashford	127,500	Tenterden	231	2004
Sevenoaks	119,400	Sevenoaks	448	1936
Tunbridge Wells	118,100	Tunbridge Wells	1,000	1939
Dover	115,800	Dover	280	2001
Shepway	111,400	Folkestone	900	1924
Dartford	107,500	Dartford	956	1983
Gravesham	106,100	Gravesend	800	1968

As the list shows, there are several large theatres in Kent. Some of them reflect their history as seaside destinations: the Winter Gardens in Margate was built in 1911, while the Leas Cliff Hall in Folkestone dates back to 1924. (The oldest venue is Margate's Theatre Royal, first built in 1787.)

There are, however, a number of (relatively) modern large theatres in Kent. In Canterbury, for example, the Marlowe theatre opened on its present site in 1984 while the Orchard Theatre in Dartford opened a year earlier. Since the 965-seat Central Theatre opened in 2000 in Chatham, no new large theatre seems to have been built in Kent, though some existing ones have been substantially refurbished.

There are, however, plans for a major new theatre in Tunbridge Wells to replace the Assembly Hall theatre, as part of a wider redevelopment (including new civic offices) known as Calverley Square. This is due to be a 1,200-seat venue, opening in 2022. The project's website explicitly mentions the Marlowe theatre in Canterbury as a model, and says it wants to host 'West End-style' shows. Given Tunbridge Wells' location on the west side of Ashford borough (while Canterbury lies on the east side) this suggests that the large-scale theatre offer in the area will get more competitive.

Some of the large theatres have more than one auditorium, though the second hall may be a cinema screen rather than a theatre space. A number of Kent towns also have more than one theatre. Canterbury has two auditoriums in the Marlowe theatre, a further new site called the Marlowe Kit in the city's former heritage museum, and the Gulbenkian Arts Centre at the university (itself with two auditoriums). Margate has the Winter Gardens, the Theatre Royal and the 60-seat Tom Thumb Theatre.

If the largest towns are considered (rather than the boroughs) then six of the ten largest towns in Kent<sup>12</sup> have a theatre with at least 800 seats. Gillingham and Rochester do not have large theatres but are close to other towns in Medway that do. However, the largest town of all in Kent, Maidstone, has a main theatre with a capacity of just 400 seats.

Sometimes, these venues are part of a wider investment in arts, culture and heritage by the local authority. In Canterbury, for example, there has also been a major refurbishment of The Beane museum and library, and the authority led east Kent's bid for UK City of Culture in 2017, in which Ashford was involved. Tunbridge Wells also seems to be increasing its focus on culture, arguing that it "needs to reassert its position as a major cultural and leisure destination, making the most of its past, but also looking forward."

### 4.3.2 Venues in East Sussex

The majority of Ashford borough's people live in the town of Ashford itself. As the map in Figure 1 shows, the 30-minute drivetime area from the centre of Ashford (the High Street) is contained within Kent. However, for people in the south-west of the borough, parts of East Sussex may be relatively accessible. The following table therefore sets out the size and location of the main theatres there.

**Figure 11: Theatres in East Sussex**

Venue name	Location	Capacity of main stage
Royal Hippodrome Theatre	Eastbourne	559
Congress Theatre	Eastbourne	1,680
Devonshire Park Theatre	Eastbourne	857
Winter Garden (Floral Hall)	Eastbourne	900
Lewes Little Theatre	Lewes	154
Milligan Theatre	Rye	337
White Rock Theatre	Hastings	1,066
Stables Theatre	Hastings	131

The Congress Theatre and the Winter Garden in Eastbourne are both currently undergoing extensive refurbishment as part of the wider Devonshire Park Project, a major regeneration project in Eastbourne.

<sup>12</sup> The ten in order of size are Maidstone, Gillingham, Dartford, Chatham, Ashford, Rochester, Margate, Royal Tunbridge Wells, Gravesend and Canterbury, based on Census 2011 figures.

## 5 How could a venue be developed and sustained?

### 5.1 Challenges and opportunities

Ashford has some of the elements you would look for in a town considering a new theatre. It is sizeable and has a culturally engaged population for whom theatre is the most popular artform, despite the town's lack of a dedicated venue (which may be depressing overall engagement levels).

The town and borough's populations are growing and are reasonably prosperous by national standards. Ashford also has several active community theatre groups.

However, many of its people can easily access the cultural offer of London, which offers a depth and variety of experiences that Ashford cannot match. Ashford also faces competition from Canterbury and Tunbridge Wells. Canterbury has the most developed cultural offer locally (on top of its notable heritage attractions) and its catchment area overlaps significantly with Ashford's. The 'overlap' covers an affluent part of Ashford borough from where much of the prospective audience for a theatre in Ashford town might otherwise be expected to come.

#### 5.1.1 Management and funding

Any theatre offer above a certain size is likely to need some degree of public funding, either in the construction phase or in ongoing revenue funding. Often the latter is more of a challenge; one important lesson from the last 20 years of investment across the UK's arts and cultural sector is the relative ease with which capital funding can often be secured, compared with the ongoing revenue requirements needed to sustain the longer-term operation and successful programming of a facility.

There are a number of privately-owned theatres in Kent, but they are mostly small, often with fewer than 120 seats, such as the Medway Little Theatre, the Oast theatre in Sevenoaks or the Arden theatre in Faversham. Their repertoire is largely focused on community/amateur productions.

Other small venues are sometimes housed and supported by another institution, such as a school, as is the case with the Mick Jagger Centre in Dartford, or the E.M. Forster Theatre in Tonbridge. Among the larger theatres in the county only a few have commercial private-sector managers – ATG runs the Leas Cliff Hall in Folkestone, for example, while Parkwood Theatres operates the Hazlitt in Maidstone. The majority have some form of local authority support, sometimes through a charitable trust.

The level of revenue support required will vary according to the size of the facility, the nature of its programming, and its success in finding an audience. This section of the report therefore looks at some of the questions that might arise for Ashford Borough Council, drawing on the summary of the thinking of the critical friends group.

The group pointed out there are broadly two types of theatre – 'producing' theatres and 'receiving' theatres. The former, with their own companies and creating their own works, are almost always more expensive to run and tend to do so by relying in part on Arts Council funding as National Portfolio Organisations.

If a producing theatre is to succeed it will have to build strong ‘audience loyalty’ – people making repeat visits to see locally produced plays by ‘their’ company. ‘Receiving’ theatres rely more on ‘product loyalty’ – i.e. the audience tends to choose what to see show-by-show. Very few ‘receiving’ theatres get National Portfolio Organisation status.

Some well-established theatres do occasionally move from being receiving houses to producing houses. The critical friends group mentioned Bath’s Theatre Royal as an example, and it was thought that the Marlowe in Canterbury has similar aspirations. However, the general trend – driven in part by funding constraints from both the Arts Council and local authorities – has been for producing theatres to become receiving ones.

### 5.1.2 Artform mix

The evidence from across Kent is that theatres provide a mix of artforms, irrespective of the size of the venue. In addition to theatre, musicals and pantomimes, the mix typically includes music, comedy and film, but can also include dance and talks/lectures. The existing mix of facilities in Ashford may complicate matters for a new theatre in the town; a new venue would need to tread carefully in terms of its artform mix to avoid adversely impacting on Revelation, in particular. (Revelation’s range of activity – especially music and comedy – draws an audience from across the borough.)

The imminent opening of a new six-screen Picturehouse cinema in the town centre also provides another potential sensitivity. Picturehouse’s repertoire typically includes the kind of arthouse films and ‘event’ cinema that might otherwise be shown at an arts centre’s cinema, such as those found in other Kent towns.

### 5.1.3 Other uses

If a new theatre decided to steer clear of certain cultural activity in deference to existing venues, it could look for other ways of generating income to support its programming. These might include conference facilities or adaptable, multi-functional spaces for hire by businesses and the community. Such a building might evolve into being more of a creative hub, with theatre being part of the mix rather than the dominant activity.

A useful model for this approach might be The Apex in Bury St Edmunds, with a capacity of c.400, which has intentionally focused on music and spoken word events, to avoid competing with Bury’s Theatre Royal. To offset the loss of any potential theatre income, Apex does substantial conference and meeting trade and generates footfall through its bar and café, with art exhibitions and community events held in an expansive foyer.

## 5.2 Four possible options

The report now reviews four possible options of different sizes for a theatre in Ashford. For each of them we have identified a theatre of the relevant size in a town in the South East or East of England to act as an indicative benchmark.

### 5.2.1 Large theatre (1,000+ seats):

**Kent examples:** The Marlowe (Canterbury), the Winter Gardens (Margate), the Assembly Hall (Tunbridge Wells)

**Reasons for:**

- This is the part of the theatre market that seems to be doing best in terms of audiences. Being of such a size means a theatre can host West End-style productions without compromising production quality too much.
- Venues like this are big enough to be on national touring circuits and would raise Ashford's profile in cultural terms.
- Also big enough to allow for short runs of up to a week rather than single-night shows – more cost-efficient. It would be of interest to specialist operators
- Local tastes in theatre run to the mainstream – an audience such venues often serve well.
- A large venue would have the greatest direct economic impact on the town (in terms of box office and secondary spend, employment and supply chain benefits), helping to boost its night-time economy and to animate the town centre more generally.

**Reasons against:**

- Building such a theatre would incur substantial capital cost (perhaps £20-£30m) and may require a large Arts Council/ HLF grant to be achievable. It is worth noting that it is unlikely that Arts Council England will support a new venue development if it were in direct competition with any other ACE-funded facility or organisation within its catchment. (The Gulbenkian Arts Centre in Canterbury is an Arts Council NPO.)
- Requires many customers: Annual attendance of c.350,000 – 400,000 is needed to break even and would require the theatre to concentrate overwhelmingly on commercial touring productions.
- Few new theatres of this scale are being built currently, unless they are a replacement for an existing large facility, as in Tunbridge Wells. Nor does the current demographic suggest that the borough would necessarily be capable of sustaining a facility of such size. This would imply the need for significant revenue support from the local authority.
- Programming at such venues tends to be focused on touring productions of West End style shows – driven in large part by the need to sell seats in such a large venue. The programming can therefore lack distinctiveness, delivering a very similar schedule of shows to other large regional theatres. Changing this, by developing a 'producing' theatre capacity to originate shows in-house, can be much more expensive in terms of ongoing revenue support. Even a receiving theatre of this size is likely to require ongoing revenue subsidy from the local authority, usually of the order of £300,000-£600,000 a year.

**Figure 12 Indicative benchmark: large theatre**

Theatre Royal, Norwich	
	
<b>Capacity</b>	1,308 seat main theatre, also runs 300-seat Norwich Playhouse
<b>Programme</b>	Theatre, pantomime, concerts, community/ amateur groups
<b>Total Income</b>	£16.5m (year to 2 April 2017)
<b>Number of staff</b>	193
<b>Attendance</b>	398,600 (76% of seat capacity)
<b>Annual subsidy and sponsorship</b>	£110,000

Source: Theatre Royal accounts to 2 Apr 2017

### 5.2.2 Medium-large (550-800 seats)

**Kent examples:** The Woodville (Gravesend), Stag Community Arts Centre, Sevenoaks (across three auditoriums)

**Reasons for:**

- Ashford Borough Council has a longstanding commitment (in, for example, the Arts Strategy and the Sustainable Community Strategy) to establish a medium-sized cultural venue of sub-regional significance in the town.
- The majority of larger Kent towns have such a facility (or bigger).
- There would be scope for such a space to be hired out for large conferences or corporate hire. This is the sort of size of audience that hotels are not usually set up to cater for.
- Potential anchor for mixed-use town centre or retail development
- Good size for current music and spoken word markets

**Reasons against:**

- Such a theatre’s core performance base is likely to be touring productions. The evidence suggests the mid-size touring theatre market is difficult at the moment, with a shortage of suitable product. This would again imply a need for ongoing revenue subsidy to sustain the facility.
- Too small for national operators, but potentially too large for any local arts organisation to manage and programme – there is no obvious organisation to do this in Ashford.

Prospective theatre provision in Ashford

- Build costs are likely to be significant (perhaps £10-20m), too much for a section 106 agreement to cover on its own. The theatre build would also have to resolve whether or not to build a fly tower.
- Such venues are often sustained by pantomimes, which subsidise the rest of the year’s productions. There is plenty of competition within Kent in this field.

**Figure 13 Indicative benchmark: medium/large theatre**

Yvonne Arnaud Theatre, Guildford	
	
<b>Capacity</b>	566 seat main theatre, small studio theatre
<b>Programme</b>	Theatre, a pantomime, orchestral concerts, community/ amateur groups, film festival
<b>Total Income</b>	£3,889,000 (to 5 Apr 2017)
<b>Number of staff</b>	36
<b>Attendance</b>	112,000 (though with a 15-week ‘dark’ period for interior refurbishment – 114,000 in previous year)
<b>Annual subsidy from Guildford Borough Council</b>	£310,000
<b>Other</b>	Director’s report in 2017 accounts: “The pressure to try to programme work of an encouraging standard naturally continues but against the climate of increasing production costs and shrinking availability.”

Source: Yvonne Arnaud theatre accounts to 5 April 2017

### 5.2.3 Medium-small (300-550 seats)

**Kent examples:** Theatre Royal Margate, Gulbenkian Arts Centre (Canterbury), the Hazlitt theatre, Maidstone

**Reasons for:**

- The majority of Kent boroughs are able to support at least one theatre of this size – indeed, all the boroughs in Kent with a larger population than Ashford apart from Swale do so.
- Such a venue in Ashford would have a somewhat larger capacity than Revelation, and thus should be able to offer a different mix of music and comedy to go alongside any theatre offer.

Prospective theatre provision in Ashford

- The build of such a theatre might be affordable under a section 106 agreement. The Mercury Theatre in Colchester (a 499-seat venue) is currently being rebuilt at a cost of £8.7m, of which £4m will come from the Arts Council and £1m each from Colchester Borough Council and Essex County Council, with the balance raised from other sources.

**Reasons against:**

- As with the medium-large theatre, there would be a challenge in finding suitable touring product.
- Smaller economic impact
- Likely to require some level of public subsidy, even at smaller scale

**Figure 14 Indicative benchmark: medium/small theatre**



Source: Corn Exchange Newbury accounts to 31 Mar 2017

**5.2.4 Small (up to 300 seats)**

**Kent examples:** E.M. Forster Theatre (Tonbridge), The Space (Sevenoaks)

**Reasons for:**

- Such a facility could have community uses as well as professional theatre ones, and so could help with cultural engagement and with animation of the town centre (if that is where it was to be based). There will be a section of the population who are interested in theatre but who are for various reasons unable or unwilling to travel much distance from the town to see a production.

Prospective theatre provision in Ashford

- It would be cheaper to build than other options and is likely to need less ongoing revenue funding than larger theatres. There are examples from elsewhere of small theatres being built to very high standards and to striking architectural designs.
- There may be scope for partnerships with local organisations, such as a local school.
- It is a good size for an incremental growth strategy – testing the level of demand over time.
- Can help build a cultural ‘ecology’ locally through partnership work with other organisations creating a more distinctive Ashford ‘offer’

**Reasons against:**

- This scale of project might be thought un-ambitious for a town of Ashford’s size. It will serve a largely local audience and offer a mix of small-scale theatre and other artforms, so is unlikely to raise Ashford’s cultural profile outside the town significantly.
- It risks treading on the market share of other venues, especially Revelation and the Sinden theatre.
- May require some public subsidy in the absence of a cinema offer.

**Figure 15 Indicative benchmark: small theatre**

Trinity Theatre and Arts Centre, Tunbridge Wells	
<b>Capacity</b>	Based in a converted church, a 291 seat venue with gallery space and studio rooms
<b>Programme</b>	Theatre, music, films, visual arts, children’s theatre
<b>Total Income</b>	£922,000 (year to 31 Mar 2017)
<b>Number of staff</b>	28
<b>Attendance</b>	46,500
<b>Annual grant from Tunbridge Wells Borough Council</b>	£45,000 in year, reducing to £40,000 for 2018/19, no guarantees it will continue after that
<b>Other comments</b>	Audience declined by 18% on previous year, due to weaker live screening product availability. The bar and café company also had a difficult year related to this decline in evening audiences (as well as staffing issues)

Source: Trinity theatre accounts to 31 Mar 2017

## 6 Thoughts on options

The four options outlined in the previous sections all have their strengths and weaknesses, and the Borough Council might see merit in any of the four. The preferred option is partly dependent on the scale of financial support that the Council and its partners (e.g. Kent County Council, Arts Council England) are able and willing to provide.

Beyond that key financial issue, however, the following factors should be considered:

- Development, market and operational risk
- Economic impact in its broadest sense (i.e. direct impact measurable in net additional spend and jobs created; reputational effects; and contribution to the local arts and cultural ecology)

Taking these factors into account and mindful of the market context described throughout this report, our considered recommendation would be for the development of a 250/300-seat theatre in the town centre. This would focus primarily on theatre and music, taking care to avoid overlapping too much with Revelation's programming. It would also generally avoid cinema, so as not to compete with the new Picturehouse. The theatre would mix small-scale visiting productions and acts with community and amateur activities. To offset any commercial limitations from its lower capacity, the site should include space to generate other revenue streams such as a café, conferencing facilities or retail.

This would help Ashford to grow demand for theatre and build an audience base capable of supporting a larger venue at some point in the future. It is not so large, however, that its sustainability depends on a level of programming that necessarily cannibalises business from other local venues.

When that greater level of latent demand can be demonstrated – particularly in the context of a producing, as well as receiving, theatre – Ashford would be in a much stronger position to argue for support from other organisations like Arts Council England. A useful model is Bishop's Stortford, where an initial 250-seat theatre is currently being relocated and expanded into a 500-seat anchor for a larger arts centre.

This model would establish a venue of a broadly similar size to that of the mixed school/community theatres in Kent: the E.M. Forster theatre in Tonbridge, the Space in Sevenoaks, and indeed the Sinden theatre in Tenterden. Other examples of theatres of this approximate size include the Tower theatre in Folkestone and the Trinity theatre in Tunbridge Wells.

Given the ongoing pressure on local authority spending, there may be a case for building such a venue on a temporary or limited-lifespan basis. The National Theatre in London, for example, built a 225-seat temporary theatre (initially known as The Shed) while one of its main stages was closed. The theatre remained open for five years. Others include the Theatre on the Fly, at Chichester, which was open for one summer to mark the 50th anniversary of the Chichester Festival Theatre, while on a much larger scale, the RSC built the Courtyard Theatre in Stratford as a temporary replacement while its main theatre was closed for a major refurbishment. Recent advances in design and technology mean that temporary spaces do not necessarily mean compromising on acoustic quality or sightlines: the Garsington estate in Buckinghamshire is home to a 600-seat capacity temporary opera house in its grounds.

## 7 Annex

### 7.1 Largest Experian categories in the 30-minute drivetime area

#### Aspiring Homemakers

Aspiring Homemakers make up 13.1% of the Ashford drivetime area's population. They are "younger households settling down in housing priced within their means."

Key Features of this group:

- Younger households
- Full-time employment
- Private suburbs
- Affordable housing costs
- Starter salaries
- Buy and sell on eBay

#### Country Living

Country Living makes up 12.0% of the Ashford drivetime area's population. They are "Well-off owners in rural locations enjoying the benefits of country life."

Key Features of this group:

- Rural locations
- Well-off homeowners
- Attractive detached homes
- Higher self-employment
- High car ownership
- High use of Internet

#### Senior Security

Senior Security makes up 9.5% of the Ashford drivetime area's population. They are "Elderly people with assets who are enjoying a comfortable retirement."

Key Features of this group:

- Elderly singles and couples
- Homeowners
- Comfortable homes
- Additional pensions above state
- Don't like new technology

- Low mileage drivers

### Rural Reality

Rural Reality makes up 9.1% of the Ashford drive-time area's population. They are "Householders living in relatively inexpensive homes in village communities"

Rural Reality people live in rural communities and generally own their relatively low cost homes. Their moderate incomes come mostly from employment with local firms or from running their own small business.

## 7.2 Audience Spectrum categories<sup>13</sup>

### Trips and Treats

Mainstream arts and popular culture influenced by children, family and friends

- While this group may not view arts and culture as a passion, they are reasonably culturally active, despite being particularly busy with a wide range of leisure interests
- Tend to be comfortably off and living in the heart of suburbia
- Children range in ages, and include young people still living at home
- With a strong preference for mainstream arts and popular culture like musicals and familiar drama, mixed in with days out to museums and heritage sites
- This group are led by their children's interests and strongly influenced by friends and family

With above average attendance at museums, galleries and particularly heritage sites, cultural engagement of some sort is part of their lives. Given that access to provision can be relatively low, considering where some of this group lives, they are more active than might be expected with some making planned efforts to attend.

Live music, musicals, film, pantomime, circus, carnival, plays/drama, museums, galleries and street arts feature most highly in their choices. Around half have attended museums, galleries or heritage sites in the last 12 months. This suggests that family outings, including for special occasions, are reasonably frequent.

### Dormitory Dependables

Suburban and small towns interest in heritage activities and mainstream arts

- A significant proportion of arts audiences are made up of this dependably regular if not frequently engaging group
- Most live in suburban or small towns and show a preference for heritage activities alongside popular and more traditional mainstream arts

<sup>13</sup> These descriptions of categories are taken from the Audience Agency's website.

- Many are thriving, well off mature couples or busy older families
- Lifestage coupled with more limited access to an extensive cultural offer mean that culture is more an occasional treat or family or social outing than an integral part of their lifestyle
- There are significant numbers of households from this group spread across every English region, with the biggest concentrations found in the South East and the North West.

**Interests:**

Living in suburban and rural areas their access to a broad range of arts offerings is not as extensive as it might be, and this along with their busy lifestyles, may contribute to their infrequent engagement. Sometimes when they do attend they have to make time and travel, so arts and culture may tend to be more of a special treat than part and parcel of their everyday social lives.

They do not think of themselves as particularly arty people, but enjoy attending to be entertained and to socialise and relax with friends.

Whilst open to a broad range of arts and cultural activities, they have a marked inclination towards popular and mainstream offerings, with more than half taking in events annually. Their disposition towards contemporary and classical events is not quite as strong, but those artforms are still attended roughly in line with or slightly above the national average.

**Commuterland Culturebuffs**

Affluent and professional consumers of culture

- Affluent and settled group with many working in higher managerial and professional occupations
- Keen consumers of culture, with broad tastes but a leaning towards heritage and more classical or traditional offerings
- Often mature families or retirees, living largely in leafy provincial suburban or greenbelt comfort
- A group willing to travel and pay for premium experiences, their habits perhaps influenced by commuting
- Motivations are multiple, ranging from social and self-improvement, to the pursuit of learning opportunities for older children
- Tend to be frequent attenders and potential donors
- Located in provincial suburban and greenbelt locations, often within commuting distance of urban centres across the country. Especially prevalent in the South East but less so in London.

**Interests:**

Attending arts and cultural events form an integral part of their social and family lives. They have amassed experiences of a wide range of artistic offerings, have a broad cultural frame of reference and are knowledgeable about the arts. They can afford to pay for high quality artistic events which provide them with opportunities to spend time with their families, socialise with friends and peers, and provide learning or self-improvement opportunities for themselves and their children.

Although voracious consumers of all artforms they tend to prefer classical offerings. Many are open to contemporary programme choices, but there are a large proportion who are risk averse to trying anything new.

They rank second only to Metroculturals in the engagement ladder for every artform genre, except for culturally specific events, where their engagement is still above average, but lower than all other artforms.

Plays/drama and art exhibitions are the most commonly attended events, along with musicals and live music.

They represent the keenest audiences for opera, ballet and classical music, and are audiences for some of the less widely attended artforms such as contemporary dance and jazz.

### Home and Heritage

Rural areas and small town, day-time activities and historical events

- A more mature group that is generally conservative in their tastes
- Large proportion are National Trust members
- Classical music and amateur dramatics are comparatively popular
- While this is not a highly engaged group – partly because they are largely to be found in rural areas and small towns – they do engage with local cultural activity
- Likely to look for activities to match their needs and interests, such as accessible day-time activities or content exploring historical events
- Living outside of major towns and cities and in rural areas across the UK with the lowest proportion found in London.

They have clear preferences for familiar, mainstream programme offers and a leaning towards classical content across a range of artforms. They are most likely to make a visit to a heritage site with 47% making 3-4 visits in the last 12 months and are slightly more likely than average to go to the theatre. Like most segments, they are broadly positive about arts and culture, do see themselves as arts-attenders and value the arts in general. Limited access locally and a reluctance to travel, especially in the evening, probably mitigates against more active engagement.

### Facebook Families

Younger suburban and semi-urban, live music, eating out and pantomime

- A younger, cash-strapped group living in suburban and semi-urban areas of high unemployment
- Least likely to think themselves as arty, arts and culture generally play a very small role in the lives
- Less than a third believe that the arts is important
- Often go out as a family: cinema, live music, eating out and pantomime being most popular

- Living in city suburbs and on the edges of towns throughout the UK, but more predominant in the Midlands and across the North.

Despite low overall engagement, they are occasionally doing some activities which meet the needs of their families and within their budgets and locality. Guaranteed family enjoyment and fun will take precedence over consciously engaging with the arts, museums or heritage.

Most likely to be interested and engage in the popular and mainstream, they are also more likely than the average to see work that is culturally specific. Their choices are particularly family-oriented such as cinema, pantomime, live music, musicals, carnival, circus and plays/drama. Occasionally, maybe once or twice a year, a museum could be an easier option, or a trip to a local heritage site, if it is free.

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