Opportunity Peterborough

urban regeneration company

Cultural Gap Analysis for Peterborough City Centre Area Action Plan

Final Report

August 2008

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Contents

Contents

1 Executive Summary

BOP was commissioned to conduct a Cultural Gap Analysis for the City Centre Area Action Plan process. This aims to assess the strengths and weaknesses of Peterborough's cultural 'offer' and to recommend ways in which culture could be embedded within the City Centre AAP.

To do this we conducted a review of the relevant literature, consulted a wide range of local and regional stakeholders and carried out research into the cultural offer of comparable towns and cities and into Peterborough's creative industries. The main finding is that, although Peterborough's cultural offer has a number of strong points, the overall offer is weak for a city of its size. At this time, it is also clear that there is no consensus among the stakeholders on how the offer might be improved over the timeframe of this plan. A number of projects have been proposed, which have attracted varying degrees of support, but there is no unambiguous case for any of them.

Given this, our task was to develop a view of the best way forward for Peterborough's city centre. It builds on the city's current assets and offers a future vision which is, we feel, ambitious but realistic. It should be made clear, however, that this report is not (and was never intended to be) a detailed feasibility study for any of the projects described in this report. We would strongly recommend such work is carried out before any of the proposed schemes is taken forward.

The first challenge to be addressed is Peterborough's lack of a distinct cultural quarter of the kind found in some towns of comparable size. Its cultural assets are already quite dispersed, from the Broadway theatre in the north, to the Museum in the west to the Key theatre on the riverside to the south. We do not believe that trying to stretch this zone further is likely to be successful. Areas such as the South Bank and the station/hospital quarter can be enhanced in imaginative ways, including public art and commercial leisure, but are not the best places to site major new cultural assets. We suggest instead a way of developing more coherence to the existing cultural offer, which in turn has implications for the location of future assets.

The report puts forward the idea of a cultural 'cross' in the city centre. A west-east Heritage axis would stretch from the Museum to the Cathedral, and would build on the city's current strengths. A north-south Arts axis would run from the Broadway to the Key theatres. The two axes would intersect at a rejuvenated Cathedral Square, which would become a focal point for public events and would help revive the night-time economy in the heart of the city.

The north-south axis is less clearly defined at present and would need to be consolidated over time. The Rivergate East/Embankment site offers the best opportunity to do this. A successful project here would 'anchor' the axis and draw people down to the Embankment, from where they might explore the riverside and the South Bank. We would recommend that this is the best location for any new cultural asset that is developed.

The Northern Embankment stands a little apart from the proposed axes. Here, we propose an extended 'Sports Village' as the best option. There are existing facilities – the lido, the swimming pool and the athletics track – which are well-liked but are now in need of upgrading, while Peterborough United FC is likely to move from its London Road stadium in the next few years. One option is for the club to leave the city centre altogether; moving to a new stadium on the Northern Embankment would keep PUFC in the city centre and continue to bring people into the city. Such a stadium could also provide a venue for a small number of large-scale events (such as concerts) each year. Alongside this, refurbishing or re-providing the existing facilities, and perhaps adding an indoor sports venue, say of 2,000 seat capacity, would form the basis of a Sports Village combining a range of high-level and community-oriented facilities in the same area. As such, it would add something distinctive to Peterborough's city centre.

The remainder of this report discusses our research and the recommendations we have drawn from it in greater detail.

2 Introduction

2.1 Development context

Peterborough is entering a Government-backed growth phase that will see the addition of at least 25,000 new homes and 20,000 new jobs to the city by 2021; and that has the potential to establish Peterborough as the regional "capital" of the East of England. Peterborough is also working to position itself as the UK's leading Environment City.

Strengthening Peterborough city centre is vital to achieving these ambitions. The City Centre Area Action Plan (AAP) will set out a 13-year programme of intensification and investment that promises to deliver more city centre homes, including a Carbon Challenge scheme; to boost the performance of the retail, office and leisure sectors; and – in essence – to make the city centre an attractive and popular destination once more.

Culture has an important role to play in realising these goals. Culture is taken in this report to include the arts, creative and media industries, museums, libraries and archives, heritage, architecture and the built environment, and public spaces. It has a close relationship with sport and commercial leisure: all three are drivers of tourism. Culture is often also a component of education, play and youth service provision.

Peterborough city centre's present cultural offer has some highlights, but overall is acknowledged to be weak. This is illustrated by, among other factors:

- The majority of residents travel elsewhere to access cultural provision, according to consultation undertaken to support the Council's 2003 Cultural Strategy
- Projects in Peterborough have managed to attract very little arts and heritage lottery funding to date. No local arts organisation attracts regular Arts Council funding.
- Peterborough is significantly under-provided for sports facilities, according to the City Council's draft Sport and Physical Recreation Strategy for 2009-2021
- In a 2004 survey for English Heritage, Peterborough Cathedral was found to be the least visited cathedral in England

Opportunity Peterborough and Peterborough City Council recognise that the forecast growth of the city provides a strong rationale for encouraging new cultural provision for the benefit of the increasing population, and for boosting city centre tourism.

The AAP's wide-ranging programme of city centre regeneration is an opportune vehicle for embedding culture into the improvement of the city centre. It is aligned with a suite of regional and local policies which support the enhancement of culture in the city centre. Most explicitly, the LDF Core Strategy Preferred Option proposes policies to:

- Make the most of the existing facilities and assets such as the river frontage and the embankment, protecting this for future events and uses such as festivals and concerts
- Aim to promote a regionally / nationally flexible multi-use venue which can host a range of activities and large-scale events, including concerts, sports, arts, theatre events, a sport village / centre of excellence, leisure pool complex etc. to attract many visitors

- Improve the evening and night-time economy, offering a wide range of activities that are socially inclusive and meet the needs of different communities and different ages, and that also take into account community safety

As other cities have found, investing in culture has the potential to boost not only Peterborough's cultural and tourism offer, but also its retail and economic performance.

The City Centre Framework Economic Report stresses that a strengthened cultural offer could draw new visitors into the city centre. It could help to encourage those who work in Peterborough to use the shops and restaurants during the day and to stay after work.

The Peterborough Integrated Growth Study points out that diversity, a rich cultural life, a distinctive local identity and an inspiring public realm are associated with attracting creative industry and knowledge economy workers and entrepreneurs.

Cultural investment also tends to generate more positive publicity and media coverage than other types of investment. Cultural projects have real potential to provide the 'wow' factor in the city centre development – or at least to accelerate awareness of Peterborough as a distinctive and attractive location and as an Environment City.

2.2 Culture in the AAP to date

The Issues and Options report released in March 2008 examines the cultural ambitions that have attracted most attention from city stakeholders in recent years, including those proposed in the Core Strategy. These ambitions are articulated as a manageable number of options.

The Cultural Facilities options focus on the proposals for new or improved performing arts venues; in particular, a multi-use arena including sports events that might be realised as part of a major development providing a new home for Peterborough United FC.

- Option AR1 – Develop a multi-use arena on the Embankment, with Peterborough United FC making use of the facility
- Option AR2 – Develop a multi-use arena on the Embankment, without Peterborough United FC as a user
- Option AR3 – Develop a multi-use arena within the Station Quarter development
- Option CF1 – Promote a multi-use arena as a cultural / performance venue to complement existing facilities within the city centre
- Option CF2 – Strengthen the cultural role of the Northminster area, building on the current attractions of the Broadway Theatre (which could be further improved), the library and cinema, and by creating smaller cultural facilities as part of residential-led schemes
- Option CF3 – Further enhancement of cultural facilities based around further improvements to the Key Theatre, with development of built facilities on the riverside at the Embankment, between the Courts and the Key Theatre
- Option CF4 – Establish a cultural role on the South Bank centred around heritage mill buildings and tram sheds, to include exhibition space and outside performance space as part of an improved public realm in association with other uses.

The Tourism options attempt to identify a spatial focus for tourism in the city centre, based on combinations of existing assets.

- Option TO1 – Focus tourism development on the Embankment and South Bank areas, building on the existing assets of the Key Theatre and the open space.
- Option TO2 – Focus tourism development in the core area of the city centre, building on the assets of the Cathedral, Cathedral Square, Priestgate and Peterborough Museum.
- Option TO3 – Focus tourism development in a core area of the city centre, from the cathedral and Priestgate southwards to the River Nene, focusing on the area around London Road Bridge and Railworld to the west.

Other themes in the Issues and Options report with some relevance to culture, or which are fundamentally linked to the options above, include:

- Peterborough United FC – site options for a new 15,000 seat stadium for the club
- Regional Pool, Athletics Track and Lido – options for retaining or re-providing on the existing Embankment site, or re-providing outside the city centre
- Restaurants, Bars and Cafés – whether to focus new facilities in specific areas or to disperse throughout the city centre
- Connections, Streets and Spaces – various options to enhance connectivity and legibility, and to encourage pedestrian and cycle use
- University – whether to focus on North Embankment, South Bank, Peterborough District Hospital site, or to disperse facilities throughout the city centre
- Green Space – various options for enhancing the Cathedral Precincts, Fengate South, the Embankment and Stanley Recreational Ground
- River Nene – various uses for the riverside areas

The focus on capital investment and major venues is appropriate within a spatial planning document, but it is important to recognise that other aspects of culture could contribute to revitalising the city centre. These aspects - festivals, art in the public realm, film, library services, community sport, and heritage (built, portable and intangible) - receive relatively less attention in the report. The smaller scale facilities that underpin community cultural and sports participation and talent development also need to be supported.

2.3 Public consultation on issues and options

Following an initial round of consultation starting in December 2007, a series of events to consult upon the AAP Issues and Options report were held in Peterborough in March 2008. Few of these consultations identified a definite or wholly undisputed preference for particular options in the AAP. However, a number of useful points emerged.

First, there is public support for improving Peterborough's cultural and tourism offer. The majority of participants feel that cultural facilities and tourism should be dispersed across the city centre. The potential to make greater use of Peterborough's heritage assets, including Peterborough Museum, was also emphasised.

Second, there is public support for improving Peterborough's restaurant, bar and cafe offer. Again, the most popular approach would be to disperse such activities throughout the city centre, although many feel that the river front and Cathedral Square could become key focal points.

Third, there is public support for making more of the city centre river areas. Greater recreational uses, moorings and leisure, along with better pedestrian and cycle links, and an improved public realm are all strongly supported. There is also backing for cultural facilities around the river. However, no clear preference emerged as to the most appropriate form for these facilities to take.

Many participants supported the inclusion of an arena as part of a development on the Embankment, but there were also a number of objections to this scheme. Some participants question the viability of a major new facility. Feedback from Peterborough City Council officers favours the development of a receiving house theatre (options CF2/3) over an arena.

Peterborough United FC's future is controversial. Some participants are strongly in favour of a new football stadium on the Embankment while others would rather it moved out of the city centre altogether or stayed where it is.

There is also strong support for the lido, regional swimming pool and athletics track remaining in the city centre, rather than being displaced by new facilities or relocated elsewhere. This suggests that public support for any development on the Embankment may depend upon existing sports facilities being retained. The need for sensitive design was also highlighted, to ensure that any major new structures on the Embankment do not detract from views of the Cathedral.

The consultation report recommended that the issue of stadium and / or arena based development on the Embankment needed "considerable further design work, consultation and public debate as the Council takes forward the preferred option for the city centre AAP."

2.4 Cultural analysis methodology

Opportunity Peterborough commissioned this Cultural Gap Analysis report from BOP to inform the Consultants Recommended Option report, the next stage of the AAP process.

It is important to note that this report is not a feasibility study. Its recommendations are drawn from the relatively brief analysis and consultation exercise described below. There has been none of the detailed examination of design, delivery and financial viability that should inform decisions on any major project.

The Cultural Gap Analysis recommends what range, scale, land-take, and optimal location (e.g. clustering, mix, critical mass) of cultural offerings could reasonably and viably be proposed within the Consultants Recommended Option report, and gives some indications of the nature of delivery of these offerings and long-term future management (e.g. through public, private, voluntary sectors). The recommendations are informed by:

- A review of the existing literature around the subject
- Examination of major cultural and sporting projects in six comparator cities and towns.

- Face-to-face interviews with ten stakeholders and email questionnaires sent to a total of around 75 organisations (of whom 30 responded) including local authority officers, local cultural organisations and private sector leisure operators, and regional strategic agencies and cultural funders.
- Analysis of secondary business data from the Annual Business Inquiry, to assess the strengths of the creative industries in the Peterborough local authority district

This report also does not attempt to propose a fresh vision for culture in Peterborough or to recommend how current provision might be best managed. That is the role of the forthcoming Peterborough City Council Cultural Strategy. Rather, it suggests a road map for the development of the city centre cultural offer in the context of the long-term regeneration programme specified in the AAP.

3 Analysis of Research

This section of the report reviews the data we have collected in the process of our research. This took three forms: information on the cultural offer of comparable cities; the results of our stakeholder interviews and a subsequent assessment of local strengths and weaknesses; and an analysis of creative industries in Peterborough.

3.1 Lessons from comparators

BOP examined cultural provision in six comparator cities and towns representing a mix of neighbours, competitors and aspirational targets for Peterborough: Northampton, Milton Keynes, Norwich, Leicester, Derby and Exeter. This group was chosen in consultation with Opportunity Peterborough. All except Exeter have slightly larger populations than Peterborough.

The analysis aimed to provide a sense of the range of cultural assets that each comparator place offers, and an idea of how such assets were delivered – which bodies initiated them, the development process, and how they are funded. The focus was on the areas in which Peterborough is contemplating investment, principally theatre, music, visual arts and media, and sports. Built heritage was mostly excluded, as there is little that can be done to create new heritage provision.

A summary follows; a fuller analysis is included as Appendix B of this report.

3.1.1 Summary of findings

Three of the six comparators – Milton Keynes, Norwich and Northampton – have a high-spec receiving theatre. Derby and Exeter have producing theatres, while Leicester has its new ‘Curve’ development, replacing the Haymarket Theatre.

If the National Bowl in Milton Keynes is excluded as a ‘one-off’ facility, two of the comparators have reasonably large music venues, other than their main theatres. Both Leicester’s De Montfort Hall and Derby’s Assembly Rooms can hold up to 2,000 people.

All of the comparators have a centre for visual art or digital media. Sometimes this is a dedicated contemporary art gallery, such as MKG in Milton Keynes, but often it is a flexible mixed-media venue. These have often been driven by community activity and local demand. Peterborough lacks such a place, other than the gallery space within the Museum.

Four of the six have football stadiums with a capacity of 20,000 or more. Derby, Leicester and Northampton also have at least one other major sports venue, either for rugby or cricket. Peterborough has just one large sports stadium, Peterborough United FC’s ground at London Road, with a capacity of approximately 15,000.

None of the six has a ‘Sports Village’ – a hub of linked sports facilities - although Milton Keynes has built a new football stadium and arena as part of the same development.

The comparator analysis suggests Peterborough's overall cultural offer is weak, particularly in these four areas of cultural activity, falling short of that typically seen elsewhere in similar places. It is also worth noting that Peterborough lacks an unusual high-profile asset on the lines of Leicester's National Space Centre, the Sainsbury art collection in Norwich or Milton Keynes' National Bowl.

The following sections discuss each of the four main cultural forms under consideration in more detail, and are illustrated with an example.

3.1.2 Theatre

Most of the comparators have a main theatre which is a little bigger than Peterborough's Broadway Theatre, which can hold 1,200 people – the largest, Northampton's Derngate, can accommodate 1,500. Unlike the Broadway Theatre, the comparators' main theatres often have full receiving capabilities, including a fly tower. There are a number of producing theatres as well, though these can be smaller – the Royal, also in Northampton, seats around 460 people, for instance. Some of these theatres, such as the Derby Playhouse and the Royal & Derngate, are currently experiencing serious financial difficulties.

Royal & Derngate Theatres, Northampton: *the Royal is a 19th century theatre, a 460 seat producing venue with up to 6 productions a year. The Derngate was built in 1983 at the rear of the Royal. It has 1,200-1,500 capacity depending on product (which can range from opera, dance, musicals and plays to snooker tournaments). It is mostly a receiving theatre. Since 1999, the two have been jointly managed by the Northampton Theatres Trust. The theatres underwent a £15m redevelopment in 2005/06 yielding two auditoriums and Underground, a 'creativity centre' for community and youth projects. The Trust is an Arts Council Regularly Funded Organisation (RFO) receiving £715,000 next year, in recognition of its importance and the quality of its work.*

3.1.3 Music

Music venues are more varied, and in many cases are provided alongside other cultural or sporting programmes within a multi-purpose scheme. Milton Keynes has much the largest venue – the 65,000 capacity National Bowl. Although the demand for live music seems to be growing, dedicated music venues remain comparatively small. For example, the Academy Music Group, one of Britain's leading promoters, has six properties in the 2,000-5,000 capacity range, all in big cities: London (Brixton Academy and Shepherds Bush Empire); Birmingham, Glasgow, Newcastle and Sheffield. The largest venues for music in the comparators hold up to 2,000 people. This seems to suggest Peterborough would not need a dedicated music venue that was any bigger than this.

There are also possibilities for hosting larger concerts and cultural events in multi-purpose arenas. There are few of these in the comparators – the new arena:mk may be the most notable. Such buildings are often anchored by a sports team, usually in basketball or ice hockey. Peterborough has no top-flight basketball team.

Other buildings, such as cathedrals and churches, can also be used for music. Exeter Cathedral, for example, has a regular series of classical and choral concerts by the likes of the London Mozart Players and is an important venue for the Exeter Summer Festival. It can hold up 1,000 people. Peterborough Cathedral and St John's Church both have considerable potential as concert venues – the Cathedral currently hosts 15-16 concerts a year.

Music can also be offered as part of the mix in smaller multi-use venues too, such as the Phoenix Arts Centre in Exeter.

> ***Phoenix Arts Centre, Exeter:*** *this occupies a former university building in the city centre. It programmes dance, theatre, music, film and visual art. It has three exhibition spaces; dance, drama and arts studios. The auditorium is a flexible space with 144-450 capacity. Phoenix Media Centre offers facilities for production of digital media.*

3.1.4 Visual Arts and Media

Many cultural projects are initiated by the activity of independent community-based cultural organisations. This seems to be particularly true of those in the visual arts and media. Examples include the Fishmarket in Northampton and QUAD in Derby.

> ***The Fishmarket, Northampton:*** *an old market hall in the town centre, built in 1930s, closed in 2006. Taken over and renamed by the Northampton Art Collective, an independent, not-for-profit arts organisation which itself was founded in 2003 by local artists. The Fishmarket has two large gallery spaces, retail units, a café, and art studios. Its goal 'is to create a contemporary arts space of national significance'. It is funded by the Council, Arts Council England, and Northampton Enterprise.*

Other projects are driven by demonstrable community demand. Sometimes this can be a replacement for an existing facility. After a fire destroyed the old central library in Norwich, it was replaced by the Forum, a much bigger project which was anchored by the library but which also included the BBC's regional headquarters and public realm improvements. Similarly, the success of Q Arts and Metro cinema has driven the new QUAD project.

> ***QUAD, Derby:*** *currently under construction in Derby city centre at a cost of £10m (£3m from Arts Council England). It will be a centre for art and film with two cinemas, two gallery spaces for contemporary visual art, a digital studio, and a BFI mediatheque. It will become an Arts Council RFO with £380,000 first year funding. QUAD is a partnership between Derby City Council and two established arts organisations: Q Arts was the city's main visual arts gallery, founded in 1998 on that back of Derby Community Arts (DCA), while the Metro cinema was Derby's only independent cinema.*

3.1.5 Sports

All the comparators have professional football teams. Derby and Norwich play in the Championship; Milton Keynes, Leicester, Northampton and Peterborough play in League

One; while Exeter City are currently in League Two. Stadium capacities vary from Sixfields in Northampton, which can hold 7,600 to Leicester's Walkers Stadium and Derby's Pride Park, both of which can hold around 33,000. Leicester and Northampton also have top-flight rugby teams with stadiums holding 17,400 and 13,500 respectively. Derby and Northampton are the main bases for their county's cricket team.

The location of these major sports grounds varies, but there was a tendency for the previous generation of stadiums (built in the last 20 years) to be based outside town centres, often on the outskirts. This allowed stadiums to be built alongside other relatively space-hungry infrastructure such as retail parks, hotels or conference facilities. However this trend may change due to pressure to reduce unnecessary car usage. It is also worth noting that many new stadiums are designed in such a way as to leave space for an increase in capacity should the resident team become more successful.

MK Dons stadium (Stadium: mk): *22,000 seat capacity initially, proposed to increase to 32,000. Opened in 2008 on outskirts of town. Average attendance was 6,000 at previous ground (National Hockey Stadium). Cost £50m (for whole scheme). Adjacent to retail park (inc. IKEA and ASDA), hotel, conference facilities and arena:mk. Project is the result of a collaboration between InterMK, ASDA, IKEA, MK Council and English Partnerships.*

3.1.6 Success criteria

The many individual assets and projects examined in the comparator analysis suggest that successful cultural projects are founded on five criteria.

1. Existing cultural organisations with a strong track record and capable of supporting expansion – to deliver and manage new provision
2. Demonstrable demand among local and visitor audiences – to provide public support for new projects and to provide the income that will sustain them
3. Consensus among stakeholders on the way forward – to yield capital and revenue funds, and political support
4. Opportunities for realisation through city centre development – to secure appropriate sites with good footfall and transport connections, and minimal constraints
5. Supporting community and commercial leisure development – to create critical mass and to encourage crossover of users

These five criteria can be used to guide the development of Peterborough's cultural offer, and to judge prospective cultural projects. Any project that is a good fit with all five criteria will be well placed to contribute to the revitalisation of the city centre. Any project that cannot satisfactorily demonstrate its fit with at least three of the criteria should be subject to rigorous development to address its shortcomings, or possibly should be discarded. The overall mix of uses in any particular locality also needs to be borne in mind.

3.2 Local strengths and weaknesses

BOP's stakeholder consultations found strong agreement on the strengths and weaknesses of Peterborough city centre's current cultural offer. There is modest agreement on aspirations for the city centre, with particular support for developing existing assets and strengths such as heritage, arts venues, city centre sport facilities and the public realm. However, there is no consensus on which new or enhanced major venues, if any, would be most effective, nor where such projects might be sited.

All of these findings are consistent with the findings of EDAW's public consultation on the Issues and Options report. This implies that both exercises successfully identify the main aspirations and concerns relevant to culture within the AAP.

The SWOT analysis summarises the results of the stakeholder and public consultations, augmented by the findings from BOP's analysis of regional and local policies and the Citizens' Panel conducted by Peterborough City Council in 2006.

A full report on BOP's consultations is included as Appendix C of this report.

Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis

Strengths	**Weaknesses**
Heritage offer focused on Cathedral and Museum (both of which plan to enhance their facilities and / or activities) River environs Peterborough festival Key and Broadway Theatres (recently renovated and investigating the possibility of expansion / enhancement respectively) Compact, walkable city centre Ethnic diversity of the local community Existing sports facilities at Embankment Grassroots community activity in arts Thriving local specialist sports club scene Sub-regional centre for sport Local creative industries, especially books and press and audio-visual	Small scale buildings which are ageing and / or not fit for purpose Assets under-utilised and under-valued No receiving theatres or large scale concert venue Lack of variety in cultural offer Lack of animation, some public safety issues Poor quality restaurant, bar and café offer Traffic flows cut off Embankment Shortage of hotels and low visitor numbers Virtually nonexistent city marketing No higher education presence Lack of enthusiasm and take-up of the cultural offer, and general pessimism Lack of a vibrant and sizeable independent local arts sector Low levels of sport participation (less than half of residents do any at all)
Threats	**Opportunities**
Retail development may pull footfall away from historic centre and threaten remaining independent retail Continued cultural competition from near competitors e.g. Norwich, Cambridge, and from London	Planned growth of the city and resulting changed demographic HE provision planned which will diversify cultural demand and bring vibrancy Potential to create a heritage quarter along the axis from Cathedral to Museum Potential for water-based holiday tourism along the river connecting to Fenland along with residential and leisure uses Cluster of environmental businesses Continuing development of Railworld for environmental education Aspiration to become an environmental capital Enhanced sports facilities to hold regional level sports events Outdoor spaces and activities (particularly the Embankment and Cathedral Square, but also Stanley Park)

3.3 The creative industries in Peterborough

BOP has conducted an analysis of *Annual Business Inquiry* data to assess the creative industries in Peterborough. It should be pointed out that this covers the whole local authority district, not just the city centre. It is not a bespoke analysis for Peterborough; instead it uses a standardised set of weightings derived from a research project BOP undertook for a Welsh client, which looked at a number of larger towns and cities. Nevertheless, it does give a useful insight into the creative industries in Peterborough. A fuller discussion of the data is included as Appendix D of this report.

3.3.1 Summary

As a proportion of employment, the creative and heritage sector in Peterborough compares well with those in much larger cities. It is similar to the levels found in Bristol and Cardiff, and is higher than that of Birmingham, for example. Peterborough seems to benefit from its proximity to London and Cambridge, although Cambridge is also a competitor and aims to become the dominant regional location for creative industries.

The data analysed does not indicate where creative industries are located within the Peterborough local authority district, but from BOP's consultations many of them may be located outside the city centre in, for example, peripheral business parks.

The AAP offers an opportunity to boost Peterborough's existing creative and heritage sector with a particular focus on the city centre. This might be achieved by planning suitable workspace into the city centre, ranging from small to medium scale office accommodation to live/work units to specialist production facilities. If the University develops a creative school, it might also contribute by supporting public / private knowledge transfer networks and by offering incubation units for spin-off businesses. The Innovation Centre and proposed Centre for Digital Excellence could also be important in this.

Detailed mapping of Peterborough's current creative industries, consultation on their needs, and an action plan of appropriate activities and capital investment is desirable.

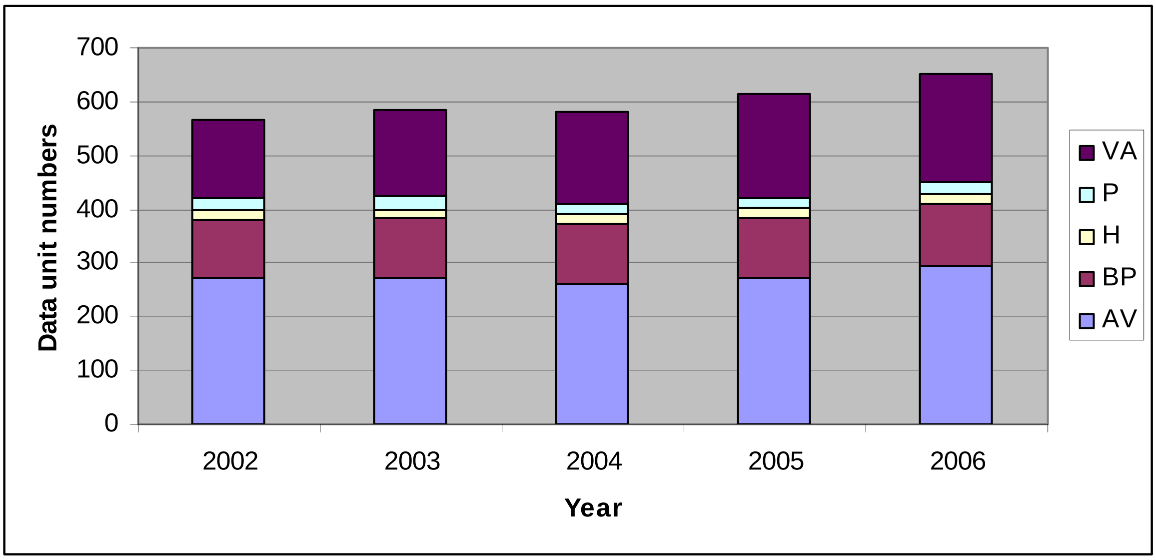
Creative industry workers are frequently associated with city centre living and demand for cultural provision, bars and cafés, and independent retail. Successfully introducing creative industries into the city centre could increase the viability of city centre residential development / conversion, and of enhanced cultural facilities.

3.3.2 Data results

BOP looked at five broad categories, or 'domains', within the creative and heritage sector. Four of these – Audio-visual (AV), Books & Press (BP), Performance (P) and Visual Art & Design (VA) – are taken to be the creative industries, as defined by the DCMS's Data Evidence Toolkit. The fifth domain, Heritage (H), was added to bring museums, libraries and historic buildings into the analysis.

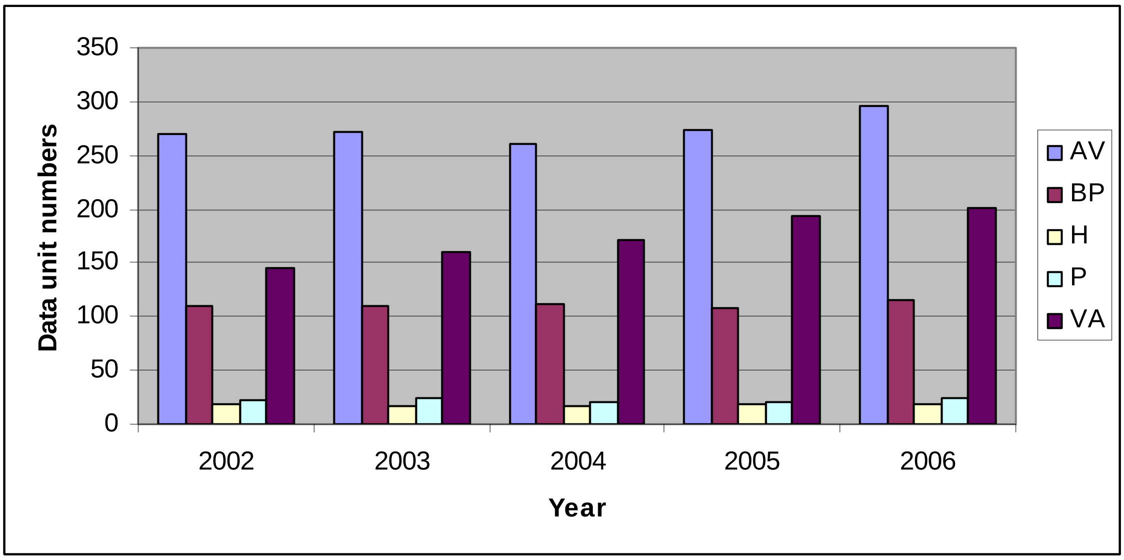
The *Annual Business Inquiry* data is divided into Standard Industrial Classification (SIC) codes. Some of these codes include 'non-creative' activity as well, so some form of weighting is required. For the purposes of this work, a standard weighting devised for an earlier project was used. Figure 1 shows the number of creative and heritage businesses and organisations in Peterborough local authority district.

Figure 1: Numbers of creative businesses in Peterborough, 2002-06



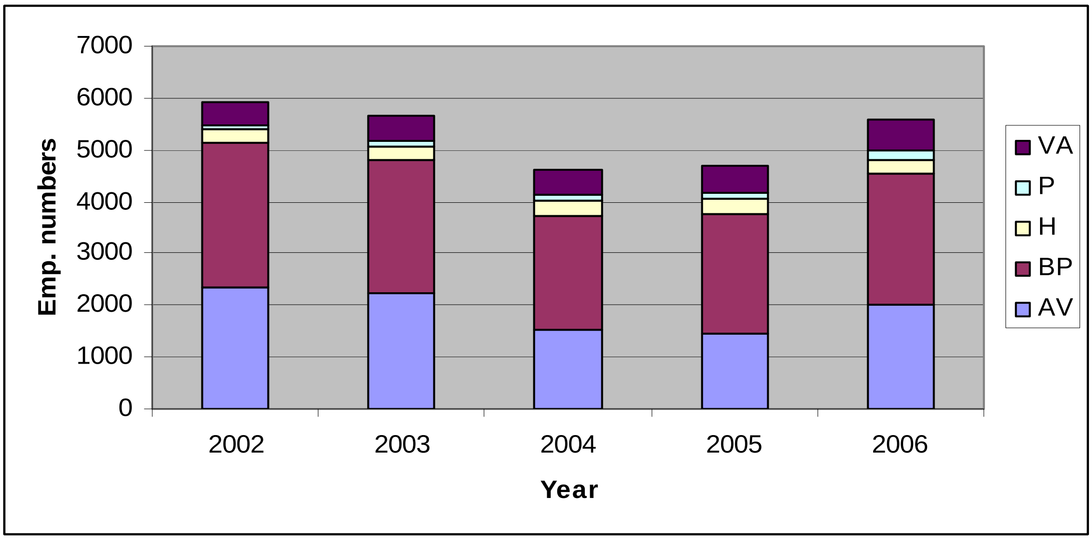
The number of creative businesses in Peterborough has risen slowly but steadily over the last five years. Around half of this growth has come in the Visual Arts & Design domain. Among the other domains, Audio-Visual has seen some growth too, while the other three have changed little. These trends are shown more clearly in figure 2.

Figure 2: Numbers of businesses by cultural domain, 2002-06



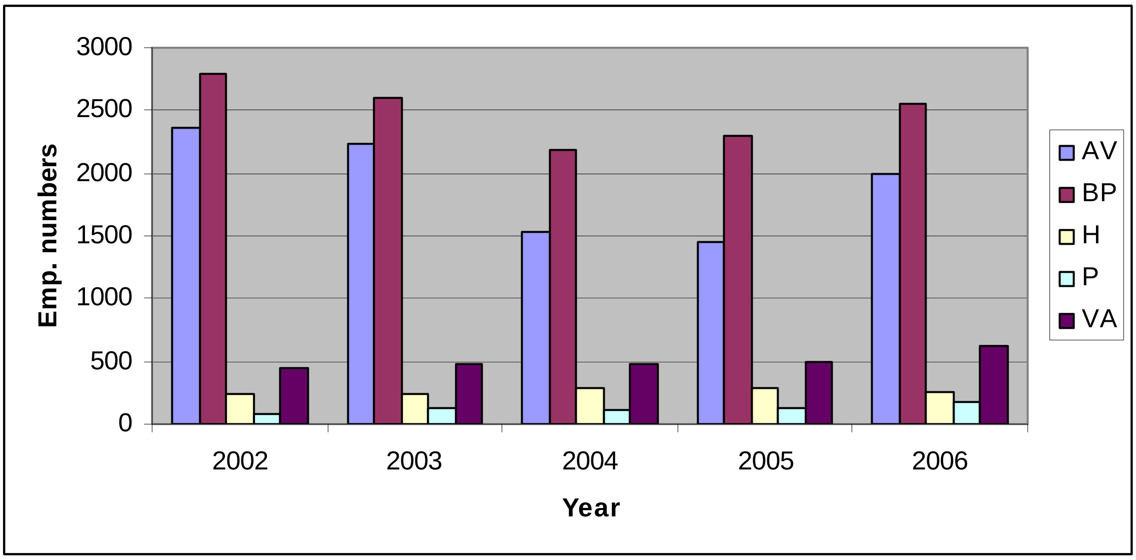
Employment patterns, however, look rather different (see fig. 3). Employment levels dip in 2003 and 2004 before starting to recover in 2005 and 2006. Books & Press is the largest employer by domain, followed by Audio-Visual.

Figure 3: Creative industry employment in Peterborough, 2002-06



Over the five years, as figure 4 shows, Audio-Visual jobs have fallen from around 2,400 to 2,000, although the level has fluctuated considerably. Books & Press have also declined somewhat overall, from 2,800 to 2,500, though numbers have recovered from their 2004 low. The other three domains – Heritage, Performance, and Visual Arts & Design – have seen some growth, but are still much smaller.

Figure 4: Creative industry employment by domain, 2002-06



Average business size varies considerably. The largest firms (in 2006) are found in the Books & Press domain, with an average of 22.1 employees, while Heritage organisations, which are mostly in the public sector, average 14.2. Audio-Visual and Performance companies are broadly similar in size at 6.8 and 7.1 respectively. The smallest firms are found in Visual Arts & Design, at 3.1 people.

4 Key issues

An analysis of the success criteria, Peterborough's current cultural SWOT, and the spatial development opportunities and timetable specified within the AAP suggest there are four key issues that need to be addressed within the AAP.

4.1 Intelligent cultural growth

As in the comparator cities and towns, Peterborough's future cultural offer needs to evolve from existing cultural provision and activity. The significant strengths uncovered by this report are a logical primary focus for development. Many of the current local weaknesses are already being addressed in some way or can progress through working in partnership with the stronger parts of the local cultural sector. However, fixing these weaknesses quickly is unlikely, so they set limits on what is attainable in the near future.

The challenge for the AAP is to propose an 'intelligent' programme of cultural growth that responds to the phased development of specific areas of the city centre and which recognises the capacity of each part of the local cultural sector at each stage. There needs to be a substantial amount of flexibility within this programme to allow for delays to or acceleration of major development schemes. Regular dialogue should be held with the many cultural stakeholders that will implement some element of the AAP to review progress and to ensure that the AAP remains up to date.

The focus of each phase of development might be, in brief:

Short Term (by 2012)

- deliver projects based on cultural strengths (e.g. Museum, Cathedral) while building consensus and capacity within weaker parts of the local cultural sector (e.g. arts – priorities to be agreed in discussion with Arts Council East). Two further drivers are the relocation of Peterborough United FC and the South Bank / University development.

Medium Term (by 2016)

- Medium term (by 2016) – deliver projects designed to address cultural weaknesses and which emerge from capacity building exercises and the Perceptions Peterborough event. Provide a cultural element – particularly public art – within major schemes in the Station Quarter, North Westgate and the Commercial Core.

Medium Term (by 2016)

- Long term (by 2021) – realise aspirational projects that are the culmination of building of consensus, funding and audiences over the short and medium terms, and / or which require the freeing up of appropriate sites such as Rivergate East.

By 2021 Peterborough should see greatly increased participation in culture by its residents, greater numbers of visitors to the city centre, and a greater diversity of daytime and evening uses. This does not mean that every part of the city centre will contain a cultural element – in fact, development needs to be carefully focused to impose greater form on the currently dispersed cultural facilities, as discussed in section 4.4.

4.2 The Heart of the City Centre and the night-time economy

The success of a city centre is often measured by the success of the area at its heart. In Peterborough's case this is Cathedral Square and the streets running from it, including Long Causeway, Bridge Street and Cowgate. If this area flourishes during both the day and night it will benefit the wider city centre and improve the city's marketability to visitors. To make this happen, a range of active uses will have to be encouraged along and around these streets. Culture in its widest sense has a significant part to play in this.

Retail has been Peterborough's daytime 'anchor' for many years, and will continue to be so. However, it has long been recognised that the city centre is often 'dead' in the evening, and many people do not feel safe there. The careful introduction of more varied and higher-quality cultural, leisure and residential uses would help to turn this around and boost the night-time economy more generally. Bringing more life into the city centre at night should make it in turn more appealing and welcoming to visit.

Cathedral Square is the strategic hub of the city centre. It is a place where people should be encouraged to linger and be entertained, but is also a crossroads through which they should be able to pass safely from one quarter of the city to another. It has potential as a space for events, but with improved restaurants and cafes it could also generate more of a continental feel. However, Cathedral Square would also be enhanced by appropriate improvements being made to the surrounding streets. They need to be active areas in their own right, but these streets are also the links to facilities such as the Broadway and Key theatres and need to include visual clues, both to aid the flow of pedestrians and cyclists around the city centre and to join the centre together as a coherent whole.

4.3 Embankment and Rivergate East opportunities

The Embankment is understandably valued as a green space with river frontage and the location for the city centre's primary sports facilities. It has the potential to become a major 'park' for the revitalised city centre as well as offering enhanced cultural, leisure and play facilities. Rivergate East offers several potential brownfield sites at a prominent location at the terminus of Bridge Street, close to the Key Theatre and the Embankment itself.

The prominence and sensitivity of the Embankment means that any development will need to gain widespread stakeholder and public support – particularly any major facilities that would occupy all of or exceed the adjacent brownfield sites (Rivergate East but also the Wirrina) and that might affect sports provision and Cathedral views. Noise is also inevitably going to be an issue, and necessitates careful design.

The major projects currently proposed for the Embankment or Rivergate East are briefly assessed in Appendix E of this report. In BOP's view, none of these projects can yet demonstrate widespread support or a clear-cut case based on the five success criteria suggested by the analysis of comparator towns and cities. A comprehensive appraisal of the projects is advisable in the near future. Such an appraisal should be accompanied with appropriately detailed analysis of design, delivery and financial viability for each option. It should consider any fresh proposals generated by the Perceptions Peterborough event, and should incorporate a meaningful public consultation exercise.

Of the current projects, there is probably most momentum behind the proposal to develop a stadium for Peterborough United FC that could also support cultural events. The existing sports facilities are valued by residents and could relatively simply be enhanced and managed as a Sports Village. Depending on the level of specification deemed viable, the Sports Village might incorporate a new 2,000 seat arena focused on sports but also supporting cultural and business uses, and a Polyclinic.

Whatever development goes ahead – or even if none does – the green space of the Embankment and its riverside are major assets that merit greater stewardship and use. This might be encouraged through for example enhanced plantings and paths, open air exhibitions and performances, moorings, regattas, A3 units including more floating restaurants, nature and heritage interpretation boards, art installations and play facilities.

4.4 Shaping the cultural offer

Peterborough's dispersed cultural facilities are the antithesis of the tightly defined 'cultural quarter' that towns and smaller cities often seek to develop.

The AAP's recommendations for the public realm and development of commercial leisure can do much to impose greater form and legibility. However, limits will remain on what might be defined as the "core" city centre where there are high levels of footfall and cultural facilities can expect to benefit from passing trade. City centre footfall is typically driven by retail during daytime and by A3 and commercial leisure uses during evenings (although cultural facilities and other uses do help to pull in visitors and diversify usage).

Existing cultural facilities beyond the 'core' city centre, such as Railworld, Nene Valley Railway and the Embankment sports facilities, will largely continue to operate as destinations attracting pre-planned visits rather than passing trade. The AAP might seek to improve navigation to these facilities – and to new ones on the Embankment and Rivergate East – and make the journey to them part of the experience.

Retail-led developments in the Station Quarter, North Westgate (including a cinema), and Commercial Core will increase visits to the city centre but have the potential to pull the city's centre of gravity northwest and away from existing cultural facilities. Public art and heritage interpretation can be used to encourage pedestrian flows from these areas to the historic city centre and to existing cultural facilities. Film programming links and reciprocal marketing could be encouraged between the new cinema, the John Clare Theatre in the Central Library, and any open air screenings in Cathedral Square or the Embankment.

The South Bank development area is a little beyond the 'core' city centre. In BOP's view it is not a viable location for major cultural provision or significant visitor flows. However, University and creative industry workspace uses would complement residential units and create an attractive development mix. It may be possible to build artistic links between these and the Key theatre. Commercial leisure may also have a role to play in connecting the South Bank to the Arts axis.

A reasonable degree of animation on the South Bank could be encouraged by:

- Linking North and South riverbanks through equitable distribution of A3 uses and moorings, and by creating heritage, nature and art circuits that are linked to the principal pedestrian axes in the core city centre and which cross the river (the proposed new footbridge will be important to achieving this)
- Providing signage and interpretation of the historic tram sheds and mill, aimed at attracting a modest number of dedicated heritage visitors
- Providing signage and interpretation around the new Energy Centre and Carbon Challenge development, aimed at attracting a modest number of dedicated environmental and architectural visitors
- Encouraging occasional exhibitions, conferences, performances and showcasing events linked to the University and to the creative industry workspaces

5 Recommendations

5.1 Vision

This report's vision is to develop a cultural 'cross' at the heart of the city centre via a west/east Heritage axis and a north/south Arts axis, overlaying and enhancing the public realm strategy's proposed 'stone' and 'green' axes.

The intersection of the cross will be the enlarged Cathedral Square, a vibrant new event space for the city centre. The axes and Cathedral Square will bring cultural activities into the public realm through exhibitions, heritage interpretation, temporary and permanent art installations, performances and screenings. Trails linked to the axes will draw visitors to and from outlying cultural facilities such as Railworld and Nene Valley Railway.

Retail-led new development at the Station Quarter, North Westgate and Commercial Core will be balanced by the enhancement of the Embankment as a riverside leisure destination. The Northern Embankment will provide a modern football stadium for Peterborough United FC linked to a Sports Village featuring improved regional sports facilities and a new Polyclinic. In the long term, a major new cultural facility might be sited at Rivergate East, at one terminus of the Arts axis and near to the Key Theatre.

A3 uses will be encouraged to cluster around cultural facilities in order to create critical mass. Independent retail might be focused on Priestgate, Church Street, and Cathedral Square. Creative industry workspace will be focused on the attractive but otherwise difficult to adapt historic buildings in the core city centre and on the South Bank, and will be linked to the University, Innovation Centre and the proposed Centre for Digital Excellence.

By 2012 (Short term / ST) the Heritage Axis will link the enhanced Museum and Cathedral via a revitalised Priestgate and Church Street, and Cathedral Square. The new Stadium and Sports Village will be complete, as will the development of Railworld – all of which will be linked to the historic city centre by enhanced pedestrian routes.

By 2016 (Medium term / MT) the Arts Axis will be created running from the Broadway Theatre via Central Library and Cathedral Square, and giving way to trails leading to the Key Theatre, Embankment and South Bank. Development at the South Bank will be complete and will add modest cultural uses and riverside recreation. Inviting routes to the historic city centre will draw visitors through the retail schemes at Station Quarter, North Westgate and the Commercial Core, and will connect new hotels.

By 2021 (Long term / LT) the Arts Axis will be consolidated by a major new cultural facility at Rivergate East. The commercial leisure offer will have matured in all parts of the city centre, and the public realm cultural programme will be an established part of the city centre experience.

5.2 C&T1 multi-use arena

Recommendations:

- Programme major arena-type cultural events (likely to be primarily music) within the new stadium for Peterborough United FC on the Embankment (ST)
- Programme cultural events (again, likely to be primarily music) at the 2,000 seat arena within the Sports Village, if this facility is deemed viable (ST to MT)
- Prepare the Rivergate East site for a major new cultural facility – need, function and form to be decided through the Perceptions Peterborough event, an appropriately detailed options appraisal, and ongoing consultation with potential funders and stakeholders, as well as with Peterborough residents (LT)

Rationale: According to detailed research by KPMG, the city would have to capital fund the majority of the cost of any multi-use arena, and would probably have to revenue fund, at least while audiences were established and / or if the preferred station site was not available. The football stadium may monopolise available capital funds in the short term. However, the design of the stadium could allow it to be used by arena-type music acts for negligible additional capital cost.

The cost / benefit of including a new build 2,000 seat arena needs careful consideration. It would enhance the sports provision offered by the Sports Village but would also significantly increase the capital and revenue subsidy required. It would not add significantly to the concert / music offer in the city centre, and might risk cannibalising existing audiences for music at the Broadway. Much depends on the ability to come to an agreement with an appropriate anchor tenant sports team(s).

There is an aspiration for an additional major new cultural facility in Peterborough. This is best viewed as a long term project due to the need to establish consensus on its form, to fundraise, and to build audiences. Peterborough City Council is one potential developer but would need to form a coalition, possibly including higher education. Given the right concept, there is major potential to source capital and revenue funding from outside the city. The Rivergate East site is an ideal potential location due its size, relative lack of development constraints and position at the principal southern terminus of the Arts Axis. The major projects currently proposed for the Embankment or Rivergate East are briefly assessed in Appendix E of this report.

5.3 C&T2 cultural facilities

Recommendations:

- Complete Key Theatre renovation (works underway) and Museum Art Gallery renovation (feasibility underway) and establish / build audiences (ST)
- Complete feasibility work on Centre for Digital Excellence (ST)
- Commit to the MLA Library Tariff or similar policy to secure appropriate investment in the Central Library during the city centre's growth (ST)
- Encourage greater cultural and early evening use of the existing Central Library via film, performances and exhibitions (ST)

- Build consensus among local and regional stakeholders on the future arts offer via the Perceptions Peterborough event (ST)
- With Arts Council East, build capacity in the local arts sector and encourage regionally significant arts organisations to create work in and for Peterborough (ST to MT)
- Develop an Arts axis running from the Broadway Theatre via Central Library and Cathedral Square, giving way to trails leading to the Key Theatre, Embankment and South Bank. Link the axis to the west/east Heritage axis and outlying heritage & tourism facilities (MT)
- Animate the Arts axis and Cathedral Square with temporary and permanent art installations, performances and screenings (MT)
- Embed arts into the design of public spaces within retail-led schemes at Station Quarter, North Westgate, and Commercial Core, aiming to create distinctive new developments and to encourage pedestrian flows from these areas to the historic city centre and to existing cultural facilities (MT)
- Encourage film programming links and reciprocal marketing between any new cinema at North Westgate, the John Clare Theatre in the Central Library, and possible open air screenings in Cathedral Square or the Embankment (MT)

Rationale: The Key Theatre and Museum & Art Gallery renovation projects are already underway and should enhance the offer and usage of these valued existing assets.

There is a perceived weakness in the local arts sector and a lack of consensus over major arts projects. Arts Council East is keen to engage with Peterborough to help address this, and sees the Perceptions Peterborough summit as a first step towards identifying and prioritising parts of the arts sector for support.

The public realm and the environment (and both together on the Arts axis/'green' axis) offer two powerful themes for capacity building with the arts sector. They are an opportunity for the sector to make a highly visible contribution to the city's development.

5.4 C&T3 restaurants, bars and cafés

Recommendations:

- Encourage appropriate A3 uses to cluster around cultural facilities – e.g. Museum / daytime visits / cafés and lunch restaurants; Broadway Theatre / evening visits / bars and evening restaurants; Cathedral Square / both (ST to MT)
- Provide A3 uses on riverside via development at Rivergate East, around the Key Theatre and the South Bank (ST to LT)
- Encourage restaurants and bars to become cultural venues by offering evening entertainment and exhibition spaces (ST to LT)

Rationale: Encouraging restaurants, bars and cafés to cluster around cultural facilities will help to achieve critical mass at each node of the cultural 'cross', and will generate reciprocal crossover of users.

This does not mean discouraging A3 uses in other parts of the city – indeed, patterns of private sector investment should be monitored and the AAP be revised if necessary.

5.5 C&T4 tourism

Recommendations:

- Support the Museum renovation project and enhancement of tourism and cultural uses of the Cathedral and St John the Baptist Church including concerts, performances, exhibitions and art installations (ST)
- Create an inviting west/east Heritage axis running along Priestgate, Church Street and intermediary streets, linking the Museum and Cathedral and offering interpretation of the historic city centre (ST)
- Set up a Townscape Heritage Initiative or similar programme to incentivise landlords and occupiers to refurbish historic buildings along the Heritage axis (ST)
- Support plans for development of Railworld and ensure clear and inviting pedestrian routes between it and the historic city centre, and the Nene Valley Railway (ST)
- Provide A3 uses on riverside via development at Rivergate, around Key Theatre and South Bank and enhance riverside active and casual recreation (ST to LT)
- Link North and South riverbanks through equitable distribution of A3 units and moorings and by creating heritage, nature and art circuits that cross the river (ST to LT)
- Provide signage and interpretation of the historic tram sheds and mill, aimed at attracting a modest number of dedicated heritage visitors to the South Bank (ST)
- Providing signage and interpretation around the new Energy Centre and Carbon Challenge development, aimed at attracting a modest number of dedicated environmental and architectural visitors (MT)
- In the short term target increased day visits based on heritage and river recreation, then weekend breaks once arts provision and hotels are enhanced. (ST to LT)

Rationale: The Cathedral, Museum and historic city centre buildings are universally valued and the Museum and Cathedral are already planning projects to enhance their tourism and cultural offer. Similarly, the River Nene is recognised as an underused asset with potential to support a variety of recreation uses.

The Heritage Attractions Group brings together city centre operators along with non-city centre operators such as Flag Fen and is planning a more coherent heritage tourism offer. It offers a building block for delivering increased day visits in the short term. However, Peterborough city centre starts from a low base in terms of tourism marketing and hotel provision, and is probably some years away from making the transition to being a standalone weekend break destination (although there may be opportunities to attract day visits from those on weekend breaks elsewhere in the area).

The historic buildings and new environmental developments on the South Bank will attract dedicated visitors but are too far away from the core city centre to expect substantial footfall, or to make it viable to create full time attractions there.

5.6 SL1 Peterborough United FC

Recommendation:

- Provide a new football stadium (capacity to be confirmed – probably 15-20,000) on the Embankment, occupied by Peterborough United FC (ST)

Rationale: Peterborough United FC is likely to move from its current city centre site in the next few years. The club is one of the highest profile assets the city has, and has advanced plans for development on the Embankment.

Moving the stadium to the outskirts is likely to adversely affect the ambition to reduce car usage in Peterborough, and would remove a source of visits to the city centre.

The stadium is a good thematic fit with the existing sports facilities sited on the Embankment. However the site is sensitive and careful design and consultation is needed to minimise issues around Cathedral views, loss of green space, noise and visitor flows. The financial viability of the project also needs detailed investigation.

5.7 SL2 sports facilities

Recommendations:

- Refurbish and, where necessary, re-provide swimming pool, Lido and athletics facilities on the Embankment as part of a Sports Village with a Polyclinic (ST)
- Investigate the cost / benefit of including a new 2,000 seat arena focused on sport but with cultural and business uses as part of the Sports Village (ST to MT)
- Commit to Sport England standards for releasing developer contributions for sports provision via new development (ST to LT)

Rationale: There is public demand for retaining existing sports facilities on the Embankment. Several city stakeholders feel that the city centre is the best location for sports facilities if they are to engage all sections of the community. Further consultation is needed, ranging from National Sports Governing Bodies to regional and local clubs.

The refurbished or re-provided facilities (as necessitated by the stadium development) could become more than the sum of their parts through integrated management as a Sports Village. The health focus would be supported by including a new Polyclinic.

A 2,000 seat arena would enhance the provision offered by the Sports Village but the cost and benefit need careful consideration as the arena would significantly increase the capital and revenue subsidy required. Much depends on the ability to come to an agreement with a suitable anchor tenant sports team(s) and / or private sector operator.

Financing city centre sports facilities would be assisted by committing to Sport England standards for developer contributions from residential and mixed development, and focusing these contributions if possible on Embankment and Stanley Park facilities. Sports governing bodies might also be involved in supporting funding bids and providing advice.

5.8 Supporting policies

There are a number of policies which would support the main cultural proposals.

- EHC1 streets and spaces – enlarge Cathedral Square to incorporate the historic Guildhall and St John the Baptist Church by removing the Corn Exchange building; design for maximum flexibility as an event venue including anchor points, power points and ability to partially enclose for private or ticketed events
- EHC2 pedestrian connections – provide clear and inviting pedestrian routes between cultural facilities. Include permanent heritage interpretation on Heritage axis, and support temporary and permanent arts installations along Arts axis (ST to MT)
- EHC4 Green Spaces – enhance green space on the Embankment and Stanley Park including provision for outdoor cultural and sporting uses; seek to incorporate a green element to the Arts / green Axis (ST to MT)
- EHC5 River Nene – enhance riverside recreation possibly including moorings, heritage and nature interpretation, art installations and play facilities; link North and South riverbanks through equitable distribution of A3 uses and moorings, and by creating heritage, nature and art circuits that cross the river (ST to LT)
- C&T5 hotels – provide clear and inviting pedestrian routes between hotels at Station Quarter, North Embankment and Rivergate and tourism attractions (MT)
- EE1 business space – develop high spec creative workspace in the historic city centre, and more affordable creative workspace and 'messier' production facilities using heritage buildings on the South Bank, proximal to the University (MT)
- RET1 retail – encourage independent retail and A3 uses along Priestgate, Church Street and Bridge Street, to balance chain retail at North Westgate, the Commercial Core, and Rivergate (MT to LT)

6 Appendix A: Policy and evidence sources

The Impact of Population Change in Peterborough 2001-2021, Peterborough Regional Economic Partnership

A better life: the role of culture in the sustainable development of the East of England, Living East, 2006

Arts Strategy (un-adopted draft), Peterborough City Council, 2005

Cambridgeshire Sports Facilities Strategy 2008 to 2021, Sport England, 2008

Peterborough City Centre Framework Economic Report, DTZ / Pieda Consulting, 2003

Peterborough City Centre AAP Evidence Baseline Report, EDAW, 2008

Peterborough City Centre AAP Issues and Options Report, EDAW, 2008

Cultural Strategy, Peterborough City Council, 2003

Cultural Strategy (un-adopted draft), Peterborough City Council, 2008

David Lock City Centre Masterplan, Peterborough City Council, 2005

East of England Plan, East of England Regional Assembly, 2004

Economic Impact of Tourism in Peterborough 2006, East of England Tourism, 2007

Feasibility study for a mixed-use/separate arena and casino facilities in Peterborough, KPMG, 2005

Growing the Right Way: A Bigger and Better Peterborough – Our community strategy, Greater Peterborough Partnership, 2004

Heritage Strategy (un-adopted draft), Peterborough City Council, 2008

Integrated Growth Study Main Report and appendices, Ove Arup for Opportunity Peterborough 2007/8

LDF Core Strategy (as currently available), Peterborough City Council, 2008

Libraries Strategy, Peterborough City Council, 2008

Neighbourhood Investment Plan: Strategic Context 2008

Open Space Strategy, Atkins for Peterborough City Council, 2006

Sustainable Community Strategy, Peterborough City Council, 2008

Peterborough City Centre Business Plan, Peterborough City Centre, 2007

Peterborough City Centre Retail Study, Drivers Jonas for Peterborough City Council, 2006

Peterborough Museum renovation documents

Public Arts Strategy (un-adopted draft), Peterborough City Council

Public Realm Strategy, LDA Design for Opportunity Peterborough, 2008

Regional Economic Strategy (draft submitted to Government), East of England Development Agency, 2008

Sport and Physical Recreation Strategy (un-adopted draft), Peterborough City Council, 2008

7 Appendix B: Comparator towns and cities

7.1 Peterborough

Approx. 85 miles from London. Urban area had a population of 136,000 in the 2001 census. Wider local authority district was home to 156,000.

Broadway theatre – capacity up to 1,200 but not a true receiving theatre due to stage limitations. Does host concerts (and films) e.g. Boy George, Jason Donovan. Opened 1937 as a cinema, 2001 reopened as a theatre, includes a restaurant.

Key Theatre – Auditorium holds 379. Built 1973, mix of community and touring shows, also one-off concerts. Recently refurbished with additional facilities.

Peterborough Museum and Gallery – Archaeology, social history, John Clare collection. Built 1816, museum since 1931. Run by Peterborough City Council since 1968. Free admission, c.85,000 visitors.

John Clare Theatre, including Peterborough Arts Cinema (inside Central Library), capacity 146.

Peterborough Cathedral – 60,000 visitors a year. Currently hosts 15-16 concerts a year (non-religious).

London Road Stadium – home to Peterborough United FC. Capacity 15,460, built in 1913, further development is planned. Average attendance around 5,000.

The Cresset (outside the city centre) – multipurpose theatre, exhibition, community and conference venue. Opened in 1978, funded by Peterborough Development Corporation, registered charity with a commercial trading company, capacity 850 for conferences.

Peterborough Arena (Planet Ice) 1,500 capacity – mix of seats and standing. Home to Peterborough Phantoms ice hockey team.

Railworld Sustainable transport and railway visitor centre. Approx. 3,500 visitors a year.

Peterborough currently has no university.

7.2 Milton Keynes

Approx. 45 miles north-west of London. Population of urban area in 2001 census of 184,500. Local authority district has 207,000 people. Major cultural assets include:

Milton Keynes Theatre: Opened Oct ’99. Cost £30m. £20.1m came from National Lottery, rest from English Partnerships (£7.5m) and local fundraising (£2.5m). Receiving theatre. Ambassadors Theatre Group awarded management contract in 1998. 1,400 capacity. Seen as one of the most successful theatres of its type outside London.

MK G (Milton Keynes gallery): Arts Council Regularly Funded Organisation (RFO) - £380,000 next year. Contemporary art – shows 6 to 8 exhibitions a year. Next door to MK Theatre, and built as part of same project. Up to 300m^2 of exhibition space available, but spaces are flexible. Run by MK Theatre and Gallery Company. Current revenue funding 44% ACE South East, 18% MK Council, 12% English Partnerships, 6% from MK Theatre and Gallery company, 20% from corporate and donations. Attendance free, c40,000 a year.

The Stables: RFO – £87,000 next year. On edge of town. Live music venue founded in 1969 by Cleo Laine and John Dankworth. Non-pop venue – jazz, folk, world music etc. 'New' Stables built in 2000 at a cost of £4.4m. £2.7m came from Lottery, the balance from fundraising. It has a 398 seat main venue, and a smaller second stage. Run by Wavendon Allmusic Plan, a private company/charitable trust. Annual turnover of £1.3m of which 80% is earned income.

National Bowl: 65,000 capacity – no seating. Bought by English Partnerships in 2000 (from Sony/Pace). Run by partnership between Live Nation (US-based live content and venue operator) and Gaming International (UK gaming and leisure group).

MK Dons stadium (Stadium: mk): 22,000 seat capacity initially, proposed to increase to 32,000. Opened in 2008 on outskirts of town. Average attendance was 6,000 at previous ground (National Hockey Stadium). Cost of whole scheme £50m. Adjacent to retail park (inc. IKEA and ASDA), hotel, conference facilities and arena:mk (see below). Project is the result of a collaboration between InterMK, ASDA, IKEA, MK Council and English Partnerships.

Arena:mk 4,500 seat capacity multipurpose arena. Will be main home to Milton Keynes Lions (basketball team), opens in 2008, attached to MK Dons stadium.

National Hockey stadium – opened in 1990. Has 9,000 capacity with conference facilities for 450. Long-term future in doubt given development of Olympic hockey stadium in London.

Planet Ice – home of MK Lightning (ice hockey team), capacity 2,200 seats, built 1991 as Bladerunner Arena, bought by Planet Ice group in 1998, arena to be redeveloped.

Xscape complex – indoor skiing and snowboarding, indoor skydiving, rockclimbing, multiplex cinema (Cineworld), shops, bars, restaurants, opened 2000, 6m visitors a year, cost £29m.

The Point – (Odeon multiplex cinema and live music venue), opened 1985 as UK's first multiplex cinema, went through different owners, holds 1679 people in 10 screens, also used for conferences.

Milton Keynes Museum: local social history museum – charges for entry, 18,000 visitors a year. Run by Milton Keynes Museum Trust.

Open University Walton Hall in Milton Keynes is the administrative centre for the Open University, and the base for a small number of postgraduate students. The Open University is Britain's distance-learning university, with 150,000 undergraduates and 30,000 postgraduates.

7.3 Northampton

Approx. 67 miles north of London. Population in 2001 census of approx. 190,000. Local authority district has approx. 200,000. Major cultural assets include:

Royal & Derngate theatres RFO – £715,000 next year. Run by charitable trust (product of a merger between two theatre trusts). Royal is a 460 seat producing venue; up to 6 productions a year. Derngate is bigger: 1,200-1,500 capacity depending on product, and mostly a receiving theatre. Recent beneficiary of a £15m redevelopment. Two auditoriums and Underground, a 'creativity centre' – community and youth projects.

Northampton Museum and Art Gallery: local history, art (and shoes). Admission free, 110,000 visitors in 2006/07, funded with help from the Heritage Lottery Fund, The Pilgrim Trust and Northampton Borough Council

Abington Park Museum: Social and military history. Admission free, 54,000 visitors.

The Deco Recently restored art deco cinema (English Heritage) now has a 900 seat auditorium – can be used for social, corporate and theatrical events.

The Fishmarket – Old market hall, built in 1930s, closed in 2006. Taken over and renamed by the Northampton Art Collective, an independent, not-for-profit arts organisation which itself was founded in 2003 by local artists. The Fishmarket has two large gallery spaces, retail, café, art studios. Gets funding from Northampton Borough Council, ACE, Northampton Enterprise.

Northampton Roadmender – (music venue) – original closed down, but has since re-opened, capacity 950-1200.

Sixfields stadium – Home of Northampton Town League One football club. Built in 1994, on edge of town, cost £6m, capacity of 7,600 seats, includes a hotel. Could be extended to 15,000 seats. Average attendance is around 5,600.

Franklin's Gardens – Northampton Saints rugby, Rebuilt in 2000 at a cost of £6m, capacity of 13,500. Also includes a multifunctional conference centre. Has 1,200 car parking spaces.

Northamptonshire CCC – County Ground, capacity 6,500, home to Northants CCC, also Northamptonshire exhibition centre and indoor cricket

Northampton University – established in 2005; has 10,000 students on two campuses in town.

7.4 Norwich

Urban area has popn. of 195,000 due to suburban sprawl but local authority district has just 122,000 (census 2001). Major cultural assets include:

Theatre Royal – Has a 250-year history. Currently a 1,300 seat art deco 'receiving' theatre. Underwent a £10m refit in 2007. Run by Theatre Royal Trust, a charitable trust.

The Forum (includes Millennium Library, BBC East Regional HQ, a public square and other leisure facilities). Decision was taken to create a broader community facility to replace burnt-down library. One of nine Landmark Millennium buildings in country. Opened in 2001. Building costs funded by Millennium Commission, Norfolk County Council, Norwich City Council and the business community. Run by Forum Trust. Busiest public library in the country for several years running.

Norwich Castle museum and art gallery: regional museum includes art, archaeology, natural history; charges for admission; 146,000 visitors last year. Branch of Norfolk Museums and Archaeology Service.

Norwich Arts Centre RFO – £120,000 a year. Small, independently-run venue with charitable status. Offers broad range of performing and media arts, especially photography and new digital, but is also a music venue. Started by local enthusiasts in 1976, moved to current location in 1980. Redeveloped with capital grant from National Lottery in 1999.

Sainsbury Centre for Visual Arts, University of East Anglia. Modern art and decorative/fine art from Asia, Africa etc. Housed in Norman Foster building. Admission free, 60,000 visitors a year, run by UEA, opened 1978.

Norwich City FC, Carrow Road. 26,200 capacity, opened 1935 but considerably redeveloped from 1980s onwards. Average attendance 24,500 in Championship

Norwich Cathedral - 550,000 visitors a year, was the first to have a refectory and an audio-visual facility

University of East Anglia – founded in 1963. Nearly 15,000 students (including more than 3,000 postgrads). Campus based two miles outside city centre.

Norwich School of Art and Design – specialist college with 1,100 students in Norwich. Will become the Norwich University College of the Arts in September 2008.

7.5 Derby

The urban area had a population of 230,000 in 2001; the local authority district had a population. of 234,000. Major cultural assets include:

The Assembly Rooms – opened in 1977, Derby's largest arts and entertainment complex with two multipurpose auditoria: the Great Hall (standing capacity of 2,000 and a maximum seated capacity of 1,742) and the Darwin Suite (500 standing).

Derby Playhouse – opened in 1975 after years of planning and fundraising. Producing theatre with capacity of 535 in main auditorium, with a studio holding 90, now threatened with closure after withdrawal of grants. Derby City Council has received RFO of £740,000 for continuation of live drama in the city – some of this will go to Playhouse productions.

QUAD – being built. Partnership between Derby City Council, Q Arts, Metro cinema. Cost £10m (£3m from ACE). Centre for art and film. Two cinemas, two gallery spaces for cont. visual art, digital studio, BFI mediatheque. Will get an RFO of £380,000 in first year.

Derby Dance. Gets RFO of £220,000. Deda Theatre with 134 seats, two dance studios, meeting room facilities and a café bar, the Cube

Robert Ludlam Theatre, 270 seat venue at Performing Arts college.

The Guildhall Theatre – converted to a theatre in 1971, capacity of 242 seats,

Derby County FC, Pride Park 33,600 seat stadium, opened 1997. Just outside of city centre. Championship side, with average attendance of 25,900.

Derbyshire CCC, County ground, Derby, capacity 9,500,

Derby Cathedral – 50,000 visitors a year

University of Derby – Established in 1992**.** 25,000 students (7,000 of them FE students) on two campuses, the main one in Derby, the second in Buxton.

7.6 Leicester

City's urban area (i.e. including suburbs) has population of 441,000 in 2001; local authority district has 280,000. Major cultural assets include:

De Montfort Hall – music and performance venue, built in 1913, up to 2,000 seat capacity. Programmes include classical, jazz, ballet, opera and West End musicals.

Leicester City Gallery – RFO – gets £130,000 a year. Contemporary art gallery with three exhibition spaces. Hosts 12 exhibitions a year, gets approx. 40,000 visitors a year, opened 1989

New Walk Museum and Art Gallery – Natural history, art, ancient Egyptian. Free admission, 135,000 visitors a year. Branch of Leicester City Arts and Museum Service, built in 1836, DCMS £145,000 in 2007

National Space Centre – UK's largest attraction dedicated to space science and exploration. Includes planetarium, rocket tower, interactive galleries. Paid admission, 250,000 visitors a year, opened 2001, cost £52m, sponsored by the Millennium Commission, Leicester City Council, the University of Leicester, East Midlands Development Agency and BT.

Phoenix Arts Centre – independent and world cinema, live music, some theatre

Digital Media Centre – being built as a replacement for the Phoenix. Will be 'a creative hub for new technology in the areas of film, entertainment, art, enterprise, research and education'. Will include three cinema screens, a digital exhibition space (the Cube) and digital production facilities. Will cost £21.5m, £7m coming from Leicester city council, the rest from its public and private partners (including De Montfort University).

Leicester Print Workshop - RFO - £25,000 a year, active course programme, artist studios, offers educational programmes and organises gallery exhibitions,

Leicester Theatre Trust (Curve) – used to be Leicester Haymarket, two auditoria (750 / 350 seats), opens 2008, funded by Leicester City Council, Arts Council England, The

National Lottery, East Midlands Development Agency, Leicestershire Economic Partnership and the European Union (ERDF), cost £60m

Leicester Guildhall – built in 1390, formerly a town hall and library, a museum since 1926, also performance venue, free admission

Y Theatre – small theatre at YMCA, music and comedy.

Walkers Stadium – 32,500 seats, opened 2002, cost £35m, home of Leicester City FC. 15-20 minutes walk from city centre. League One side, average attendance of 23,200.

Leicester Tigers RFC – Welford Road. 17,400 capacity (with proposals to raise it to 30,000). Dates from 1930s, on edge of city centre.

Leicester Cathedral - 50,000 visitors a year.

University of Leicester – Established in 1957. Has 18,000 students in total, 6,000 of them on distance-learning courses.

De Montfort University – Founded in 1992 (was Leicester Polytechnic before then). Currently has 20,500 students on two campuses in Leicester.

7.7 Exeter

The urban area had a population of 107,000, the local authority area had 111,000 (in 2001). Major cultural assets include:

Northcott Theatre (on Univ. campus) – has own repertory company. Founded in 1967 in response to local pressure and activity following the closure of the Theatre Royal some years earlier. Has recently undergone a £2.1m major refurbishment. Stakeholders are ACE SW, Devon County Council, Exeter City Council and the University of Exeter.

Phoenix Arts Centre. Former university building. Programmes dance, theatre, music, film, visual art. Three exhibition spaces; dance, drama and arts studios. Auditorium 144-450 capacity. Phoenix Media Centre offers facilites for production of digital media.

Royal Albert Memorial Museum and Art Gallery – currently closed for refurbishment. Includes archaeology, art, world cultures etc. – had 240,000 visitors in 2006 (free admission).

Westpoint Arena – 7,500 capacity. ‘South west’s leading venue for exhibitions, concerts, shows and fairs’, outside facilities include three open air arenas.

Barnfield Theatre – Building converted from Barnfield Hall in 1972. Thetare is run by a charitable trust, used by Exeter Little Theatre Company and other amateur and professional companies.

The Corn Exchange – 500 capacity hall, used for music gigs.

St James’ Park – home ground of Exeter City FC, capacity 9,036 (3,806 seated) Ground some distance from city centre. Team plays in Conference/League Two – average attendance 3,600.

Exeter Cathedral – built 11th ct, 450,000 visitors a year. Has a capacity of 1,000, venue for e.g. Royal Philharmonic Orchestra.

University of Exeter – established in 1955. Has 14,000 students at campuses in Exeter and Cornwall.

7.8 Sports Villages

BOP has not been able to find examples of Sports Villages in the six comparators, so we have included details of projects in Portsmouth and Leigh (Greater Manchester), together with the Guildford Spectrum leisure complex.

7.8.1 Mountbatten Sports Centre, Portsmouth: Sport only

Current facilities include:

- multi-activity indoor facilities, including main sports hall, 5-a-side courts, badminton, netball, squash and volleyball
- 400 metre, 8 lane all weather athletics track
- 535 metre cycle velodrome
- all weather pitch and two outdoor hard courts
- café bar and functions room with bar - ideal for conferences, meetings and weddings
- crèche (Mon, Wed and Fri 10am-12noon / Tues and Thurs 10-11am)
- free parking with up to 250 spaces
- Expressions Fitness gym with over 3600 sq ft and air conditioning
- massage room and sports injury clinic
- sauna, steam room and sunbeds

Parkwood Community Leisure manage and operate the Mountbatten Centre as part of a 25 year contract in partnership with Broadwater Leisure, who are responsible for the £20m redevelopment project of the centre. Portsmouth City Council has secured some funding from Sport England for the redevelopment.

It will create a new 50-metre swimming pool to the south of the Mountbatten Centre's main building, on an existing car park. 85% of the new eight-lane pool will be available for community use. The pool will be divided by a moveable boom into two community pools – one with a moveable floor so it can have different depths, including one suitable for children or other learners. There will also be a 12.5m separate teaching pool.

7.8.2 Leigh Sports Centre: Sport and Housing and HE

This planned development will provide:

- 25m pool for galas up to regional standard, spectator seating for 180

- sports hall 8x badminton courts, 2x basketball/netball courts, 900 spectators
- health and fitness centre, 65 work stations
- aerobic studio
- floodlit grass and artificial pitches

To open Jan 08: Indoor Sports Centre (£6.4m)

Overall project cost: £83m funded by Greenbank Partnership (developers), Wigan Council, Wigan Leisure and Culture Trust

Future facilities will include childcare / health provision / integral transport / housing / 10,000 seater arena and stadium / FE

7.8.3 Guildford Spectrum leisure complex

Facilities include:

- Olympic-sized ice rink, with over 2,000 seat capacity. Home to Guildford Flames ice hockey team.
- 32 lane tenpin bowling alley
- Four swimming pools including an eight lane, 25m competition pool.
- 1,300 m^2 sports arena, with up to 1,500 seats. Has space for ten badminton courts, two five-a-side football pitches, two basketball courts, or two volleyball courts. Home to Guildford Heat basketball team.
- Eight lane, 400m athletics track with seating for 800. Used by local athletics club.
- Outdoor football pitch, used by Guildford City FC
- Three squash courts

The sports complex opened in 1993 and cost £28m to build.

8 Appendix C: Consultations

BOP consulted stakeholders in all the major cultural sectors, conducting face-to-face interviews, and sending email questionnaires to a total of around 75 organisations covering local authority officers, arts organisations, public and private sector, heritage organisations, cultural support and funding organisations, local, regional and national. In all, 30 e-mail responses were received, one of whom preferred to remain anonymous, together with an email response to an interview request (from Rinaldo Fasulo), and ten face-to-face and one phone interview were conducted. This represents around half of those contacted, a good response rate.

8.1 List of consultees

Interviews

The Bishop of Peterborough

Rev Ian Houghton, Peterborough City Centre Chaplain

Gillian Barclay, Peterborough Museum and Art Gallery

Angus Meichan and Jon Marsden, Sports Strategy, Peterborough City Council

Neil Levine, Peterborough City Council Arts Services Manager and Key Theatre

Dave King, Manager, Broadway Theatre

Belinda Bryan, Arts Council England, East

Adrian Chapman, Strategic Growth and Development, Peterborough City Council

Kevin Tighe, Environment and Community Services, Peterborough City Council

Email responses

East of England Showground

Peterborough United Football Club

Space4 Gallery

Peterborough Sculpture Trust

Nene Valley Living magazine

Vital Communities

Barker Storey Matthew, chartered surveyors

Peterborough City Council Tourism

Heritage Lottery Fund

Cross Keys Homes

Peterborough Festival

Railworld

Sport England

Becky Hooper, PR, Cathedral

Peterborough Music Making

The Cresset

Peterborough City Council Libraries and Customer Services

New Link (two responses)

Nene Valley Railway

Greenwoods Solicitors

Oaka Group (Brewery Tap, Charters and East restaurants)

Perkins Engines

English Heritage, East of England

Age Concern

Peterborough City Council, Historic Environment Manager, Culture and Recreation

Fenland Archaeological Trust

Peterborough Council for Voluntary Service and Volunteer Council

Peterborough City Council, International Links Officer

Phone interviews

Railworld

Rinaldo Fasulo, owner, Broadway Theatre, short email returned

8.2 Perceived strengths

Consultees universally valued the heritage offer as the greatest current strength with the most immediate potential for development. It is seen as an asset presently largely undervalued in the city, under-utilised and insufficiently marketed. At its core lies the Cathedral and its environs and the museum.

The river and its surroundings were also universally valued. It is seen as a valued green space, with potential partially fulfilled for holding public events and festivals, an undeveloped tourist attraction, and an informal leisure space for residents. Overall, the city is seen as providing good quality public spaces with the potential to provide much needed animation of the city centre, particularly the Embankment, Cathedral Square and the wide tree lined boulevards of Long Causeway and Bridge Street. The festival itself is seen as a valuable cultural addition, encouraging community cohesion, pride and identity, and enabling audience development for future cultural offerings. The diversity of the city is considered an asset by some consultees, again under-utilised.

The two theatres, the Key and the Broadway, were frequently mentioned as current assets, although with recognition that poor current technical specifications limited their programming.

A common perception reported was of high levels of grassroots community activity in the city, both in arts and sports. However the low level of applications to Arts Council England Grants for the Arts implies that either this is not the case, or the groups involved lack the capacity or connections to bid for additional funds. Encouragingly, Peterborough Regional College is an active cultural partner in several projects as is the new Voyager School. Levels of current local activity are valued by Arts Council England as a valuable starting point for building capacity.

A number of sports facilities currently sited together in the city centre on the Embankment. Several of these are coming to the end of their useful lives and need refurbishment, upgrade or removal elsewhere. There are strong social arguments and much support for retaining them in the centre where they can be easily accessed by residents of the more deprived surrounding inner wards, where participation and health rates are low.

The current presence of Peterborough United Football Club within the city centre is not generally valued by consultees as an asset.

8.3 Perceived weaknesses

There is universal agreement that the city’s cultural life is housed in small scale aging buildings not fit for purpose: neither theatre is capable of receiving full touring productions and there is a lack of venues for live music, both very small scale, both popular and classical, and large scale, apart from occasional outdoor concerts on the Embankment.

A lack of venues is one factor leading to a lack of variety in the city’s cultural offer, which is perceived as mainstream, and in terms of nightlife, focused primarily on young adults. A second associated factor is the city’s current demographic structure, although plans for rapid growth may change this.

All consultees found the city centre lacked animation in the day and particularly early evening, although parts were animated by the type of late-night activity that made some feel unsafe. There are no spaces to linger, no impromptu street entertainment, and a lack of café culture. Existing bars, cafés and restaurants are low or mid-market chain offerings.

Pedestrian flows are hampered by Bourges Boulevard, the gyratory at Rivergate and, less importantly the railway, cutting off the assets of the Embankment and Key Theatre, and by inadequate signage.

Several interviewees noted that residents fail to participate because of what the Arts Council have identified nationally as the ‘it’s not for me’ syndrome. Many of those who might be the most enthusiastic consumers of culture both live outside the city and use surrounding cities for culture and leisure.

Most arts, heritage and cultural organisations reported a long-standing lack of unified, or indeed any, external marketing of the city, making the Cathedral for example, the least visited cathedral in England.

There is great enthusiasm for the planned arrival of higher education provision for its potential to animate the city, provide reasons to stay, and to force the delivery of a wider cultural and leisure offer.

8.4 Conclusions

There is strong consensus as outlined above on the strengths and weaknesses of Peterborough’s current cultural offer. There is some consensus on aspirations for the city, based upon developing the assets already identified (heritage, venues, sport and the public realm). These findings correlate strongly with the findings of public and stakeholder consultations conducted for the Issues and Options report. However, there is no consensus on which large-scale cultural initiatives, if any, would most effective, nor where such a project might be sited.

9 Appendix D: ABI analysis

9.1 Data analysis

9.1.1 Summary

Peterborough has significant strength in the creative industries. Books and Press is the largest employer but Audio-Visual is also strong. As a proportion of employment, the creative sector in Peterborough compares well with those for much larger cities. It is similar to the levels found in Bristol and Cardiff, and higher than that in Birmingham for example. Business numbers have grown over the last five years, but employment has declined somewhat. Both these trends are in line with patterns BOP is seeing elsewhere in its research.

9.1.2 ABI data

The data for this report has been obtained from the Office for National Statistics' *Annual Business Inquiry (ABI).*

The ABI is an annual survey of approximately 78,000 businesses representative of all sectors in the UK. It does not include the self-employed. The sample captures all large businesses (those with 200 or more employees) together with a random stratified sample of businesses from the smaller size bands. It is also designed to be regionally representative. The findings are reported in two datasets. ABI 1 is released in December each year and covers numbers of businesses and employees. The latest dataset issued is for 2006. The ONS has warned of discontinuities in the 2006 ABI data caused by initial preparations for the introduction of the Business Register Employment Survey in 2009. These discontinuities are expected to depress the figures produced by between 0.6 per cent and 1.3 per cent compared with 2005. The ABI only includes VAT or PAYE registered businesses and, as a result, it may miss a proportion of freelancers, sole traders and very small companies.

ABI 2 is released in the summer of each year and covers financial data for the sample, including turnover and contribution to gross value added.

This study was carried out using a variation on the DCMS's Data Evidence Toolkit (DET). The DET was used to assess employment and business numbers in creative industries, based on Annual Business Inquiry workplace analysis data from the Office for National Statistics (ONS), obtained from Nomis[1]. The DET defines the creative industries in terms of 43 Standard Industrial Classification (SIC) codes (at 4-digit level). However, 19 of these SIC codes include both creative and non-creative industrial activity. In order to accurately calculate the size of the creative industries, it is therefore necessary to devise weightings to apply to these 19 codes.

[1] www.nomisweb.co.uk

To calculate these weightings, we use a second data source – Experian's National Business Database (NBD). The NBD is a commercially licensed database containing 4.2m records from a range of sources including Yellow Pages, Thomson and Companies House. Business records are classified according to SIC codes, but also by other classification frameworks that allow a more detailed, finer-grained analysis. By cross-referring between these different classifications, it is possible to calculate the proportions of 'creative' and 'non-creative' businesses represented by each SIC code in a particular geographic area.

In the Welsh commission we were also asked to look at public-sector cultural organisations. To do this, we included four further SIC codes, representing museums, libraries, heritage assets, and parks and gardens. Again, Experian data was used to devise weightings for these where appropriate.

This approach was adopted on the grounds that it provides one of the most accurate methods of mapping the creative industries. It can also be repeated each year as new ABI data is released, using the weightings calculated in step 1. However, there is no perfect method of measuring the size of the creative industries, and it is necessary to highlight some 'health warnings' about the data presented in this report.

First, the Experian NBD dataset is not a complete record of all relevant businesses in an area. Some business records are suppressed if the companies have asked to be removed from the NBD, as is their right under data protection laws (NBD data is more commonly used for marketing). Levels of suppression are generally even across all creative sub-sectors, so there is little risk of distortion in weightings. Note also that the Experian data used to calculate the weightings was issued in spring 2008, but that these weightings were applied to ABI data from 2002 to 2006.

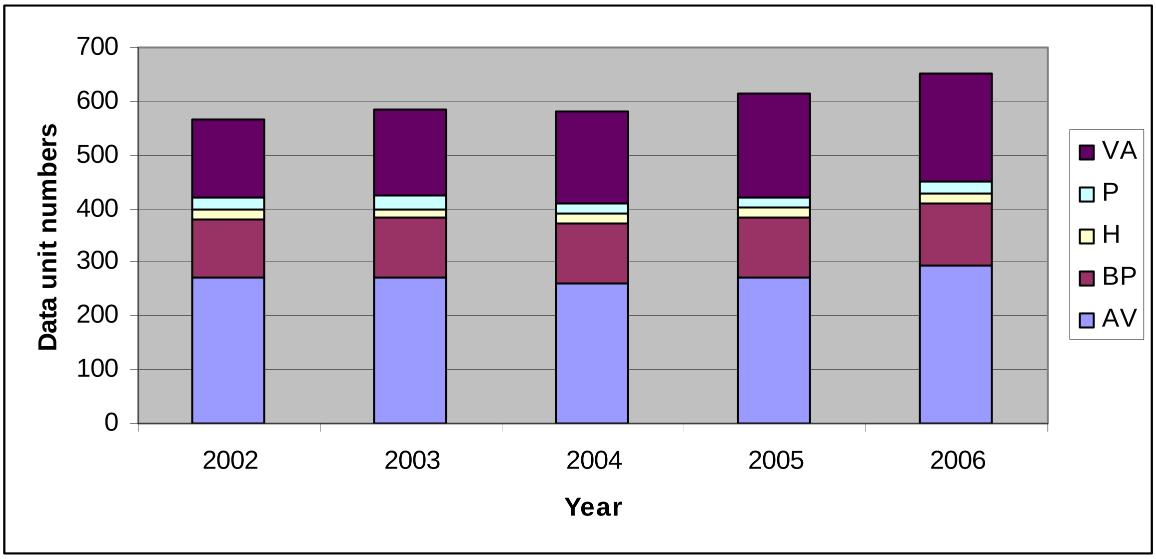
Second, the ABI is based on a survey of businesses which are registered for PAYE or VAT. This excludes the smallest companies with low revenues, and means that sole traders and micro-businesses are under-represented in the analysis. Since the large majority of firms in the creative industries sector are small, this may create distortions.

Third, ABI data is extrapolated from a national survey, and the margin of potential error increases as the area of focus becomes narrower (e.g. in terms of geography or industrial sub-sectors). It is most accurate at national and regional level, but becomes less so when examining smaller geographic areas.

For similar reasons, the DET does not measure the 13 sub-sectors identified in the DCMS Creative Industries Mapping Documents individually, but combines them into four broad 'domains'.

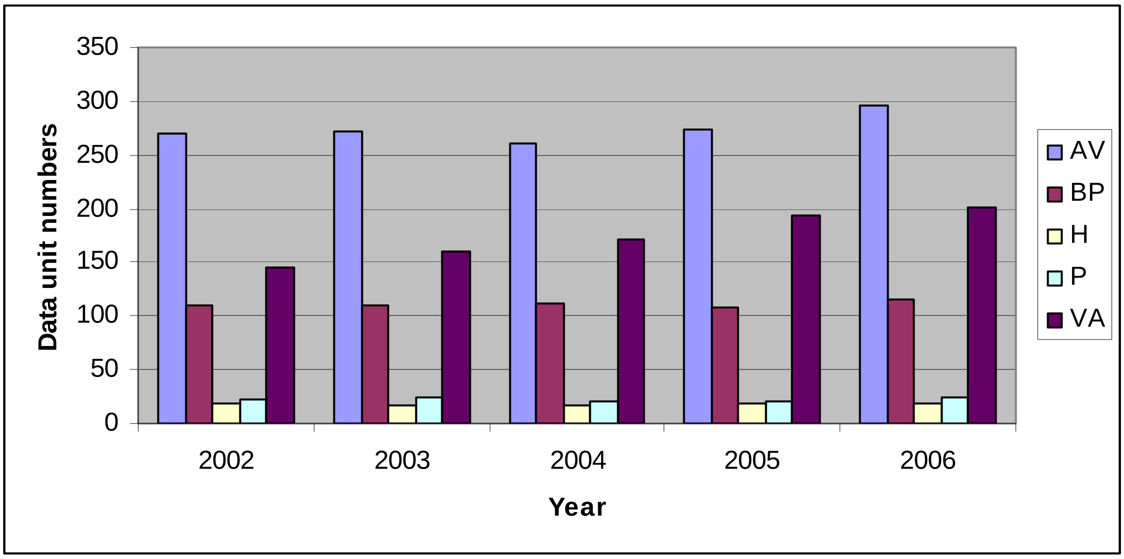
9.1.3 Data results

Figure 1: Business unit numbers in Peterborough, 2002-06



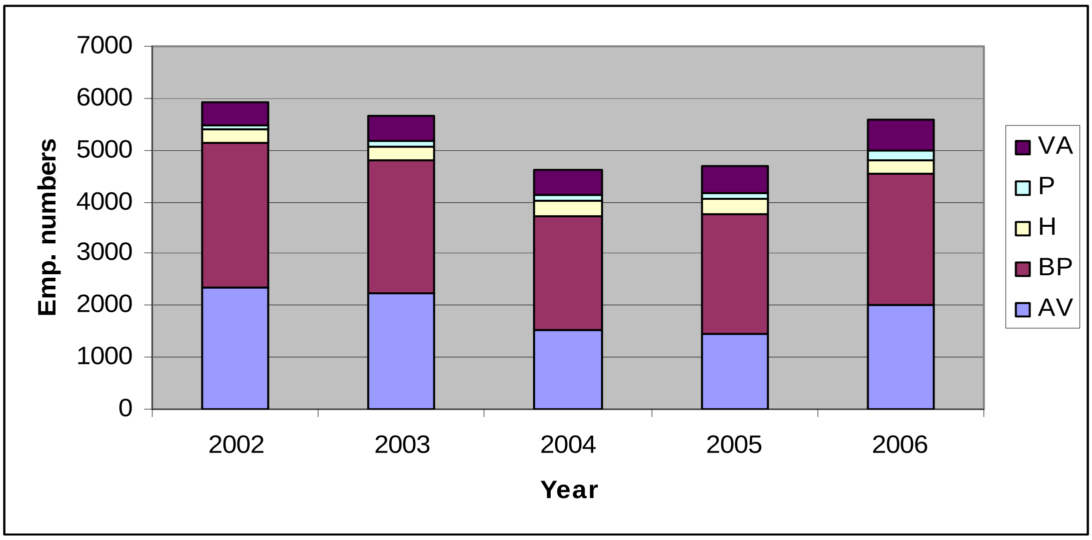
The number of creative businesses in Peterborough has risen slowly but steadily over the last five years from 2002 to 2006 from 550 to 650 (in accordance with National Statistics' guidelines, figures have been rounded). Around half of this growth has come in the Visual Arts and Design domain. Among the other domains, Audio-visual has seen some growth too, while the other three have changed little. These trends are shown more clearly in figure 2.

Figure 2: Business units by cultural domain, 2002-06



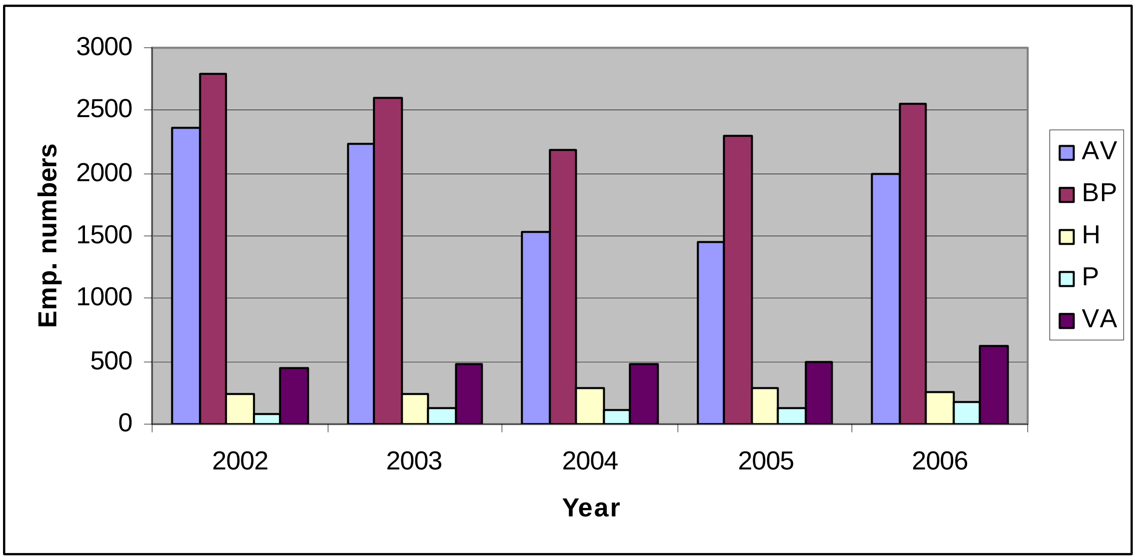
Employment patterns in the creative and heritage sector look rather different (see fig. 3). Employment levels dip in 2003 and 2004 before recovering in 2005 and 2006. Books & Press is the largest employer by domain, followed by Audio-visual.

Figure 3: Creative and heritage employment in Peterborough, 2002-06



Over the five years, as figure 4 shows, Audio-visual jobs have fallen from around 2,400 to 2,000. Books & Press have also declined somewhat, from 2,800 to 2,500 (again, these figures have been rounded). This is in line with national trends. The other three domains – Heritage, Performance, and Visual Arts and Design – have seen some growth, but are still much smaller.

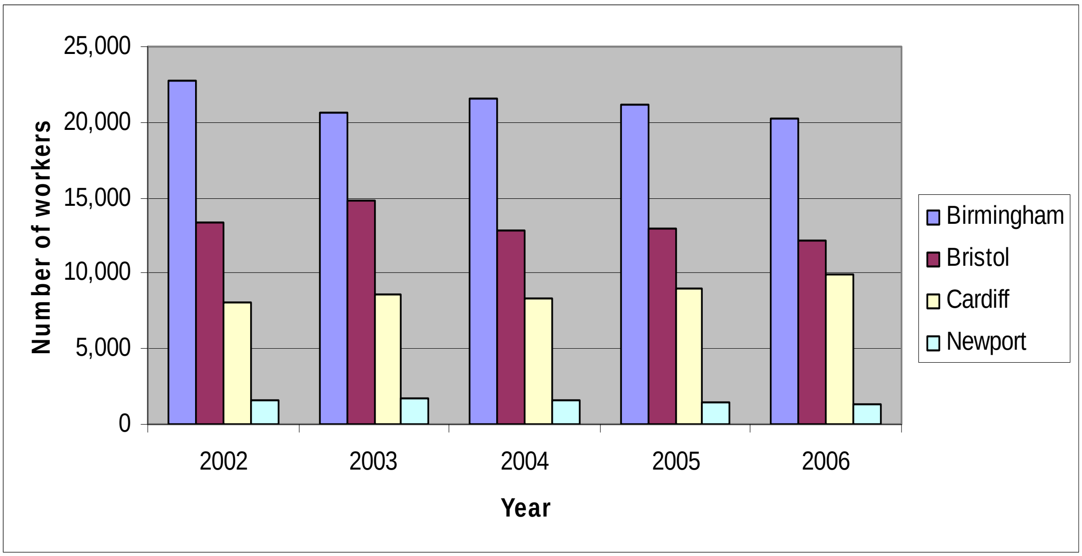
Figure 4: Creative and heritage employment by domain, 2002-06



Average business size varies considerably. The largest firms are found in the Books & Press domain, with an average of 22.1 employees, while Heritage organisations, which are mostly in the public sector average 14.2. Audio-Visual & design and Performance companies are broadly similar in size – 6.8 and 7.1 respectively. The smallest firms are found in Visual Arts & design, at 3.1 people.

BOP's research in other places has often found that employment levels have fallen over the last five years, so the trend seen in Peterborough – a dip followed by a partial recovery – is actually better than in some other cases. For example, the results of an analysis of four urban areas conducted for a Welsh client (using the same methodology) show that creative employment is declining in Birmingham, Bristol and Newport, with only Cardiff bucking the trend.

Figure 5: Creative employment in four major cities and towns, 2002-06



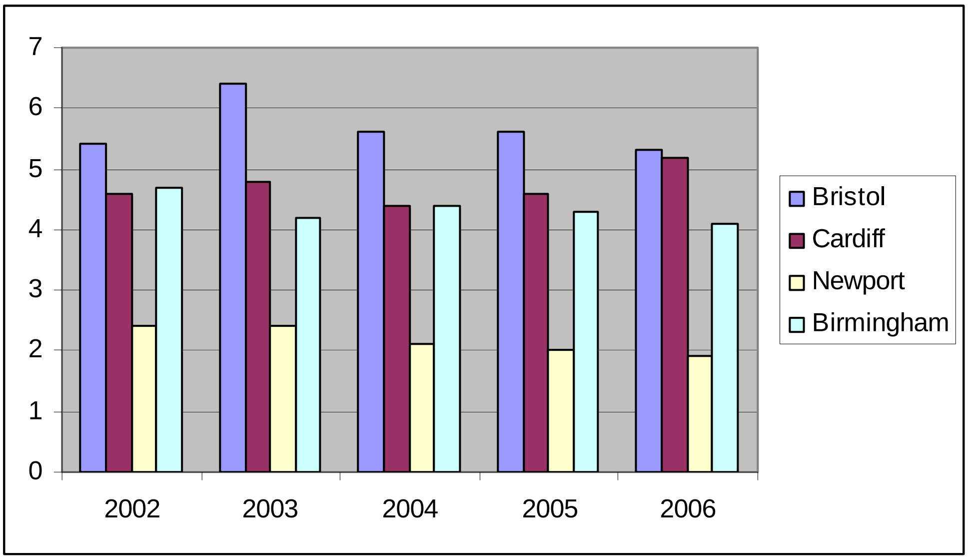
The differences between business and employment numbers as a percentage of all businesses and employment also show different patterns. Creative and heritage business units account for a tenth of all Peterborough's companies, a share that has edged upwards over the years from 2002 to 2006. Creative employment's share dipped significantly in 2004 and has only partially recovered. Total employment in Peterborough grew strongly in 2006, which reduced the relative impact of the rise in creative jobs.

Figure 6: Creative businesses share of total business numbers and employment in Peterborough

Year	Creative business units as % of total	Creative employment as % of total
2002	9.8%	6.7%
2003	9.8%	6.1%
2004	9.7%	5.0%
2005	10.0%	5.0%
2006	10.3%	5.7%

Again, though, these are good figures by comparison with other research results. Figure 7 illustrates the rates found in the four urban areas. Peterborough's rate is comparable with those of Bristol and Cardiff in 2006 and better than Birmingham's and Newport's. Peterborough clearly has significant strengths in creative industries.

Figure 7: Creative employment share of total employment, four major cites and towns



10 Appendix E: Options for the Embankment and Rivergate East

This is an initial assessment of proposals for the Embankment (including the adjacent Wirrina site) and Rivergate East, using the following criteria:

1. Capacity – are there existing organisations with a strong track record and capable of delivering and managing the new provision?
2. Demand – is there demonstrable demand among local and visitor audiences, to provide public support and to provide the income that will sustain the provision?
3. Backing – is there consensus among stakeholders on the way forwards and commitment to provide the necessary capital and revenue funds?
4. Site – is there an appropriate site with good footfall and transport connections, and minimal constraints?
5. Critical mass – is there potential for supporting community and commercial leisure provision to create critical mass?

The assessment concludes that:

- There is probably most momentum behind the proposal to develop a new stadium for Peterborough United FC on the Northern Embankment
- The lido, pool and athletics facility should be retained and enhanced, and might be beneficially re-launched as a Sports Village integrating a Polyclinic
- It is worth exploring the cost / benefit of building a new 2,000 seat arena focused on sports but with cultural and business use, within the Sports Village
- In the long term Rivergate East would be the best location for a further major cultural facility

However, none of the above proposals – or the other proposals examined – can yet demonstrate a clear-cut case; and none have yet gained the widespread stakeholder and public support that is necessary to deliver major projects – particularly on the sensitive Embankment site.

A comprehensive appraisal of options for development on the Embankment and Rivergate East is advisable in the near future. Such an appraisal should be accompanied with appropriately detailed analysis of design, delivery and financial viability for each project. It should consider any fresh proposals generated by the Perceptions Peterborough visioning event, and it should incorporate a meaningful public consultation exercise. It should also bear in mind the overall mix of uses around the site.

All figures included below are outline estimates based on comparators and research and documentation received from Opportunity Peterborough during the preparation of this report.

10.1 1,500-1,800 seat receiving house theatre

Cost: depends on capacity and whether it would be an extension of an existing facility or new build. Would require perhaps £20m capital subsidy for an extension and at least £30m for a new build, and up to £500k annual revenue subsidy (some of which might be met through the existing £300k revenue commitment to the Key Theatre).

Landtake: circa 0.5ha plus parking.

Usage: evenings; year round; sub regional catchment; 200 shows per year at 75% capacity = 270,000 visits per year (assuming 1,800 capacity).

Assessment: Peterborough City Council is the most likely developer and capital and revenue funder for a receiving theatre but there is not yet agreement within the Council on the project. Arts Council England is unlikely to become involved although engaging a large commercial operator such as Ambassadors Theatre Group could yield some financial efficiencies and offer access to higher quality product than Peterborough currently receives. However, demand for a larger auditorium is as yet unproven. The Broadway and Key Theatres both receive product and are consolidating their programmes following refurbishment and new ownership respectively. This offers an opportunity to build performing arts audiences in the city; conversely, there is a risk of a new standalone facility cannibalising audiences from the existing theatres. The received product at a new theatre would put Peterborough on a level with (and in competition with) neighbouring towns and cities rather than providing something truly distinct.

Preliminary verdict: seems speculative at present, but worth considering in future if the existing theatres can be used to successfully build audiences. It would be difficult to expand either the Broadway or the Key to the proposed capacity, so a new build would seem more feasible physically, but would be more expensive.

10.2 10,000 seat multi-use arena

Cost: depends on how generic / iconic the architecture is. At least £50m capital subsidy, and likely to require a revenue subsidy at first while audiences are built.

Landtake: 2ha plus parking.

Usage: daytime (business, conferences) and evening (pop music); year round; regional catchment; 80 events per year with average attendance of 4,500 = 360,000 visits per year.

Assessment: Peterborough City Council is the most likely developer and capital funder although there is not yet agreement among city stakeholders. In 2005 commercial operators indicated interest in discussing management of the facility. The pop concerts would put Peterborough on a level with neighbouring towns and cities rather than providing something distinct and unique – however they could generate a reasonable amount of publicity (e.g. "Pop Idol star coming to Peterborough"). At an estimated 80 events per year the Arena would not animate (or congest) the Embankment area on a daily basis. There is limited space for the supporting commercial leisure facilities typically associated with arenas, e.g. multiplex cinema or bowling. Transport modelling is needed: KPMG research suggested the Station Quarter would be the best city centre location.

Preliminary verdict: seems expensive relative to its impact on footfall to Embankment, and compared with other ways of bringing major pop acts to the city, i.e. concerts at the football stadium or outdoor events.

10.3 15,000-20,000 seat football stadium

Cost: at least £15-20m capital subsidy and broadly revenue neutral operation with Peterborough United FC as the main tenant.

Landtake: circa 3ha plus parking.

Usage: Saturdays during season (football), daytime / evening (pop concerts), some daytime (conferences); year round; regional catchment; 30 football matches plus ten concerts per year at 70% capacity = 560,000 visits per year (assuming 20,000 capacity).

Assessment: There is some support in the Council for PCC being a funding and development partner in this project, perhaps alongside other developers. Peterborough United FC is an obvious anchor tenant and is keen to move ahead quickly. There are indications that the public is split between those strongly in favour and those strongly against. The football club is not filling its present ground and would need to build up its user base. The pop concerts would put Peterborough slightly ahead of neighbouring towns and cities, and could generate a reasonable amount of publicity (e.g. “Pop Idol star coming to Peterborough”). At an estimated 40 events per year the arena would not animate (or congest) the Embankment area on a daily basis. There is potential for critical mass with the existing sports facilities, and to encourage the football club’s work with the community. There is limited space for supporting commercial leisure facilities. Transport modelling is needed.

Preliminary verdict: viable due to Council and Peterborough United FC support, although its design, operational model, and transport implications need skilful development – and it needs to gain full public support.

10.4 Sports Village

Cost: could range from modest refurbishment of existing facilities (perhaps £10m capital subsidy) to major overhaul including new build multi-use 2,000 seat arena (up to £50m capital subsidy for whole site). Major revenue subsidy required, much of which could be met through the revenue commitment to existing facilities.

Landtake: as existing possibly plus 0.5ha plus additional parking for arena.

Usage: daytime (sports facilities), daytime /evening (arena); year round; sub regional catchment; usage as present plus arena usage

Assessment: Peterborough City Council is the most likely developer and funder but there is not yet agreement among city stakeholders on the proposal. Sport England may provide some funding and a commercial operator might be interested in managing the facility for a fee. Demand for the existing facilities is proven, and their retention and enhancement has public support. There is potential to create critical mass through co-location with the football stadium, a new Polyclinic and possibly play facilities. The Sports Village would not generate significant publicity outside the sub-region.

The cost / benefit of including a new build 2,000 seat arena needs careful consideration. It would enhance the sports provision offered by the Sports Village but would also significantly increase the capital and revenue subsidy required. It would not add significantly to the concert / music offer in the city centre, and might risk cannibalising existing audiences for music at the Broadway. Much depends on the ability to come to an agreement with an appropriate anchor tenant sports team(s).

Verdict: a refurbishment-based scheme is viable as a means of enhancing valued sports facilities, although requires capital funding. Inclusion of a 2,000 seat arena needs careful cost / benefit consideration and negotiation with potential operators and tenants.

10.5 Major tourist/leisure attraction

Concept: this idea has not been proposed by city stakeholders but is included as food for thought as a potential long term aspiration for Rivergate East. It would be a major attraction based around leisure visits but with a serious message at its heart, and with the capability of supporting formal education and research. The operational model might be the National Space Centre at Leicester – although the environment is suggested as a more appropriate theme for any such facility in Peterborough.

Cost: circa £50m capital subsidy and up to £500,000 annual revenue subsidy required.

Landtake: circa 3ha plus parking.

Usage: daytime / evenings (note the Eden Project's successful concert series); year round; potentially national catchment; 250,000 visits per year.

Assessment: Peterborough City Council is one potential developer but would need to form a coalition, possibly including higher education. Given the right concept, there is major potential to source capital and revenue funding from outside the city. Demand would have to be built gradually, although a truly compelling theme and iconic design could generate significant publicity and have an instant impact on the profile of the city.

10.6 Major public artwork

Concept: this idea has not been proposed by city stakeholders but again is included as food for thought. It would be a potential icon for the city centre along the lines of the Angel of the North, or the current competition for a landmark at Ebbsfleet in the Thames Gateway.

Cost: £1m to £2m capital subsidy and no revenue subsidy.

Landtake: under 0.5ha.

Usage: visits year round from residents and visitors to the city centre.

Assessment: Peterborough City Council is the obvious developer but would need to assemble a suitably qualified advisory panel to oversee a competition (or alternatively, a direct commission). The artwork would be the centrepiece of the city centre public art programme and the riverside leisure experience. A truly iconic design would generate significant publicity and have an instant impact on the profile of the city.