Hastings Borough Council
THE STADE IMPACTS ASSESSMENT

ROGER TYM & PARTNERS
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Final Report
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1 INTRODUCTION

1.1 Hastings is the most deprived district out of the 67 districts in the South East of England. It is also the second most deprived resort town in England, and within the worst 10 percent of all districts in England. The town's strength lies in its natural assets: a sea-coastal town with a strong historical significance. However, dependence on traditional low value tourism, strong competition from other resorts (mostly overseas), and negative media reviews, has resulted in the town experiencing a downward spiral over many years.

1.2 Hastings is now the focus of considerable action and investment designed to bring about meaningful change and an improved quality of life to its communities. Making Hastings an attractive place to visit, live and work once more, bringing Hastings to its former glory in being one of England's most popular destinations, will require some reinventing from its traditional seaside. *The Stade* is a project seeking to contribute towards this.

1.3 For this reason, Roger Tym & Partners (RTP) have been commissioned by Hasting Borough Council (HBC) to assess the impact of the *The Stade* programme for submission to the Commission for Architecture and the Built Environment CABE as part of the Sea Change Large Grants programme. The main purpose is to forecast changes within the study area economy, directly and indirectly, from a major new public space, cultural infrastructure and associated facilities proposed for a unique part of Hastings known as the Stade. Collectively, we refer to these project elements as the "*The Stade*" programme.

1.4 This impact report also considers the likely cultural, community and environmental impact of *The Stade*. The community impact assessment includes an Equalities Assessment.

The Stade

1.5 *The Stade* is a partnership project led by HBC in partnership with a range of stakeholders including East Sussex County Council (ESCC), South East Economic Development Agency (SEEDA), Sea Space (an economic development organisation for Hastings and neighbouring Bexhill set up by SEEDA) and the Jerwood Foundation.

1.6 *The Stade* programme includes the development of a nationally significant art gallery – the Jerwood Art Gallery, an upmarket café, public realm improvements including improved public open space and a Square for cultural events, new community/education facility, upgraded visitor information centre and WCs and revised coach and lorry parking provision.

1.7 The Jerwood Foundation, an entirely private charitable trust established to fund the arts, education and other areas of human endeavour, wishes to build and operate a gallery to house their collection of 20th and 21st century British art alongside temporary exhibitions, both from the Jerwood Visual Arts Programme and other sources. Because the preferred Stade site for the Jerwood Gallery is considerably larger than the footprint of the proposed gallery, the project offered an opportunity to develop a range of other facilities on the Stade as part of a culture-led regeneration of Hastings. Since the Stade is already the site of several annual cultural events, such as the Seafood & Wine Festival, the purpose of the newly refurbished Stade space is to support a wide programme of events and activities that will make it a year-round attraction. Masterplanning for *The Stade* was carried out by HAT Projects and completed in May 2008.

1.8 The design vision for the Stade is to create a flexible, attractive and highly visible new public space for all who live and visit Hastings, with new buildings of high architectural quality and civic presence. The area will be pedestrian focused, designed to be easily accessible by foot from Hastings station and the town centre.

Project Aim & Objectives

1.9 The aim of *The Stade* is the creation of a visitor and resident cultural destination of national significance that contributes to the regeneration of the town. The objectives of the programme are to:

- Create a new public space and cultural facilities that increase pride and a positive local identity, both internally within the community and externally, on a regional and national level
- Create a public “centre on the seafront” which will bring visitors and locals alike together for performances, festivals and a wide range of events, thus encouraging diversity and growth
- Stimulate further investment in current seafront properties by providing a catalyst for higher value business like restaurants, art galleries, hotels and entertainment as well as housing
- Improve the quality of life of residents by providing year-round entry-level employment that is an essential starting point to enable local people to progress to the high value opportunities being created through the Hastings & Bexhill Task Force
- Stimulate cultural activity and raise the aspiration that local young people need, matching the concerted improvements to secondary schools taking place and retention of young people in the area
- Link to developments elsewhere in the South to create a ‘Cultural Coast’
- Use culture alongside Hastings’ new University Centre and college to make the town a centre for those looking for somewhere to study and learn – a centre for cultural industry and life. Encouraging further investment in learning and growth will help to create higher value employment and entrepreneurial activity
- Improve the environment by replacing an unsightly coach and lorry park with a well-designed area for public enjoyment, and improved road safety which will help to enhance and protect Hastings’ heritage and historic environment
- Improve community/education facility, particularly focusing on the young people of the Old Town, and their needs.

Study Area

1.10 *The Stade* focuses on developing an open area currently used as a coach and lorry park where Hastings Old Town meets the fishing beach, home to the largest beach-launched fishing fleet in Europe.

1.11 In assessing the impact we have focused on Hastings district, including Hastings and St. Leonards town centres and wider urban residential area in East Sussex.

1.12 There are many attractions for visitors and locals within the study. These cover a range a facilities, both manmade and natural, including two funicular rail links (one to the top of West Hill where the ruins of a Norman castle are located; one to East Hill which has a Country Park at the top); the natural sea and coastal environment, including The Stade with its fleet of 54 fishing boats and net huts; and entertainment with the White Rock theatre and numerous amusement parks and activities.

The Logic Chain

1.13 There is expectation among *The Stade* partnership that the programme of improvements offered will generate a catalyst for the area through its direct investment in physical assets and employment, import of new and additional visitor spend, and encouraging indirect investment by boosting Hastings appeal through increased cultural offer and an iconic building. Hence, it is seen as a strong catalyst for the regeneration of Hastings and is central to plans and strategies for achieving this. This follows a logic chain of events for achieving regeneration

1.14 Through this study we aim is to estimate how much of an impact *The Stade* will have and also whether the impact offers good value public investment.

The Study Method

Contextual Review

1.15 As part of this study we review relevant strategies to establish the conformity of the proposals with the local, regional and national policy context for economic development. We then review socio-economic statistics and information of direct relevance to *The Stade* work, such as deprivation, employment requirements, to provide a baseline position for monitoring the project and to identify need and how *The Stade* will affect this.

Literature Review and Case Studies

1.16 Since this impact assessment is an ex-ante evaluation of *The Stade* (which is proposed to be finished in 2010), then in the absence of real evidence, we look for evidence of impact from analogous projects by reviewing research on the impact of cultural and public realm investment.

1.17 Our method and approach draws on our experience from previous work and an exploratory method to gather information. This experience, to name a few, includes:

- Contribution of Museums, Libraries and Archives to the Visitor Economy of South East England.
- An economic impact study of the Brighton Centre conference facility and its future development as part of a wider town centre masterplan
- An economic impact appraisal of a seafront scheme in Weymouth, including public realm improvement works to the seafront
- An economic impact review of the Cruise industry on the East Kent economy
- An evaluation of the National Maritime Museum Cornwall and the adjacent Events Square in Falmouth. This study considered the wider economic and regeneration impacts across the town as well as the direct outputs
- An evaluation of the site options for the Imperial War Museum North and the project appraisal and cost benefit analysis
- A Demand Study for the Heartlands arts, open space and visitor attraction project in support of the successful Living Landmarks bid in Camborne

A feasibility study for Phase 2 of the Tate Gallery St Ives

1.18 We have also reviewed evidence relating to community impact from previous projects in Hastings and elsewhere in the UK.

The Surveys

1.19 While it will be possible to quickly estimate the direct impacts of *The Stade* based on its proposed business plan, it is more difficult to gauge and quantify the indirect impacts.

1.20 In order to explore potential impacts of cultural attractions and public realm investments on investors, businesses, residents and visitors in Hastings and the surrounding area, we carried out three separate surveys of these groups. The responses to the surveys are shown Appendix 3.

1.21 The surveys will help to establish information on the potential outputs from the project and to provide a baseline position for monitoring the impact of the project.

Investors

1.22 We sought to interview potential investors who have an interest in the area (including those who have invested or are proposing to invest in the area), however following discussions with various business agencies it soon became apparent that there are few current private sector investors in Hastings, which is partly explains Hastings's low economic performance. However, we were provided contacts for a number of businesses that had recently moved to Hastings, and some local developers that have already invested and local agents representing investors and potential investors. We discussed with these contacts what impact their perceived impact of *The Stade* would be on investor decisions relating to Hastings and any other impacts that the project proposals could have.

1.23 This includes a series of consultations and interviews with local stakeholders dealing with investment in Hastings and local business organisations such as Hastings Borough Council economic development team, SeaSpace,1066 Enterprise (including Chambers of Commerce, Locate East Sussex inward investment agency), and a number of others.

Businesses

1.24 We targeted more than 300 businesses in Hastings, and how they would react to the development. We used use a combination of hand delivery and collection, and mailed questionnaires (with reply paid envelopes).

1.25 This covered the majority of businesses in the immediate area around the Stade and extending into the Old Town, and a selection of businesses from elsewhere in Hastings and St Leonards. The sample of businesses focussed on hotel, retail and bar/restaurants where there is likely to be the greatest influence. But a number of businesses in other sectors (e.g. manufacturing and professional services) were also surveyed in case of less obvious impacts such as those related to placemaking objectives.

1.26 Responses were received from 75 businesses.

Residents and Visitors

1.27 We carried out 209 street interviews with the public in Hastings and in other visitor origin areas. The surveyed responses included:

- 67 local residents that were asked their present habits and use of Hastings town centre and seafront, their perceived use of the programmed facility and how they feel the proposed works will affect their use of the town in the future;
- 36 visitors to Hastings were surveyed about their reasons for visiting Hastings and how they feel the proposed project will affect their use of the town for trips in the future through additional or longer visits; and
- 106 interviews of potential visitors in Tunbridge Wells, Croydon, Greenwich and Canary Wharf, about how *The Stade* could affect their propensity to visit Hastings in the future through new, additional or longer visits.

Economic Impact Estimation

1.28 We draw on the above findings along with the Business Plan for *The Stade*[1] to forecast the measurable economic value of the project to Hastings. The assessment generates a forecast of the future value added from the programme in terms of the revenue, gross value added income and number of local jobs that it will support. The estimate of impact follows a chain events relating to the direct, indirect and inducements offered by Destination Station that are additional to the local economy of Hastings.

1.29 However, the impact is more than this. It is likely to contribute to a package of wider benefits, including boosting investment through better place-making, adding to local aspirations particular in areas where this is low, and cultural and community impacts which are covered next.

Cultural Impact

1.30 The assessment of the likely cultural impact is based on a review of current cultural facilities and activity, combined with the impacts of the planned facilities, projects and events. The forecast cultural impact is a qualitative assessment.

Community Impact

1.31 The forecast community impact is based on a review of the community priorities as set out in the Community Plan, combined with an assessment of the impacts of the planned facilities, projects and events. The likely community impact is a qualitative assessment.

1.32 The Community Impact assessment includes an Equalities Assessment. This considers the potential inequality factors and how they relate to *The Stade*.

Environmental Impact

1.33 The environmental impact considers the direct impacts on the site and its immediate environs, the impacts from operating the buildings and the potential transport environmental impacts.

[1] Roger Tym & Partners (October 2008), *(Draft) The Stade Business Plan*

2 LOCAL PROFILE AND STRATEGIC CONTEXT

Introduction

2.1 Here we review the local profile of Hastings in terms of its residents and the local economy to provide the context for assessing the project economic benefits in Chapter 4. The purpose of this section is two-fold, to help us understand the impact of *The Stade* from an:

- Equity angle: we want to know the extent of local deprivation that would make Hastings a priority, and where there are local deficiencies, to assess the extent to which *The Stade* may have an impact; and
- Efficiency angle: how the economy is performing, and therefore how likely Hastings and the local area may capture the benefits generated by *The Stade*.

2.2 This chapter also review the strategic context covering Hastings and the local area, to set the scene regarding regional and local policy priorities, and how *The Stade* may have fit with these.

Socio-Economic Context

2.3 At its height Hastings & St Leonards ranked with the most fashionable of Victorian resorts and the local economy prospered through the first half of the 20th century. From such heights Hastings' fortunes declined and it is now England's second most deprived resort town after Blackpool and one of the most deprived areas in the South East region. The Index of Multiple Deprivation (IMD) 2007[2] shows that the Borough of Hastings is the 31st most deprived Local Authority out of 374 LAs in England. This position has worsened by seven places since the IMD 2004 moving it from within the 20 percent most deprived in England to within the 10 percent most deprived.

2.4 The extent and level of deprivation in Hastings is the worst of all local authorities in East Sussex. Out of 53 super output areas (SOAs or areas containing approximately 1,500 people), 14 or 26 percent are in the worst 10 percent nationally, and 21 (almost 40 percent) are in the worst 20 percent nationally.

2.5 IMD details by SOA are given in Appendix One. The Appendix shows that IMD scores are poor right across the range of 'domains' but particularly so for income, employment, health deprivation and disability, crime and disorder and the living environment. Scores against education, skills and training and barriers to housing and services show a slightly better picture, however even in these domains there are 14 and 12 respectively SOAs in the 20 percent most deprived in England and nearly all SOAs are in the 50 percent most deprived.

2.6 In addition to the details of deprivation given above, the following issues derived from official statistics show the extent of the social and economic challenges that Hastings faces.

- Local prosperity is low: mean household income in Hastings in 2007 was £29,900 which is a very significant 21% below that of the South East region (£37,600) and also below the figure of £32,900 in East Sussex and £33,700 in Great Britain
- Almost 30% of children in Hastings live in low-income households
- More than one in five older people in Hastings live in low-income households
- Only 64% of homes in Hastings are owner-occupied compared to 69% nationally and 75% in East Sussex. Social housing accounts for 16% of Hastings homes which is considerably higher than the county figure of 12%.

[2] Source: ONS

- Average house prices in Hastings in 2008 were below all comparison areas, averaging £160,000 in the Borough, compared to £235,000 in East Sussex and £270,000 in the South East. However despite these low house prices, property affordability is an issue in Hastings
- The economy has a heavy reliance on the public sector which employs 42% of the working population. This can stifle local enterprise
- There is a relatively high proportion of part time, seasonal employment in low value sectors
- The economic activity rate in Hastings at 65% is considerably below the level for the South East (70.0%)
- Of those not economically active, 7.4% are permanently sick or disabled, more than double the figure for the South East which is 3.4%
- Unemployment[3] in Hastings in December 2007 was 5.9% compared to 4.2% in East Sussex and 4.3% in the South East
- Educational attainment of Hastings schoolchildren is generally poor. At primary level the %age of pupils achieving level 4 and above at Key Stage Two in Hastings is low, particularly for maths, although the situation is improving across all subjects. At secondary level the GCSE results for Hastings (and Rye) pupils are significantly below the regional and national averages, with only 38.6% of pupils gaining grade 5+ A* - C in 2007. This figure was 20% lower than pupils' achievements in East Sussex and nearly 24% less than the South East Region and England. The rate of improvement between 1997 and 2007 is also poor at only 2.1% increase in pupils achieving 5+ Grades A* – C and 0.3% increase for 5+ Grades A* – G, compared with 16.9% and 5.3% respectively for England.
- The crime rate in Hastings is higher than all comparison areas and is particularly bad for offences involving violence against the person where the rate is twice as high. Burglary, vandalism and car crime are also a significant problem
- Hastings has a high teenage pregnancy rate when compared to the regional and national rates. During 2005 there were 107 conceptions at a rate of 61 per 1,000 of the under 18 population, and a 43% increase in the teenage pregnancy rate over the period 2003 -2005
- People in Hastings die younger on average than elsewhere in the South East largely due to high rates of cancer and coronary heart disease. The 2001 Census shows that 17.5% of people of working age had a limiting long-term illness compared to 7.4% in East Sussex and 10.6% in the South East region.

2.7 The descriptions above strongly point towards the need for priority action to deliver a programme of change. This, to some extent, has already started through Sea Space, which is SEEDA's local taskforce that has been investing heavily in Hastings and Bexhill. Improvements are starting to harvest, including new commercial space, more educational places, more enterprise particularly in the cultural sector that we review further below, and a clear strategy for change. Discussions with lead officers at Sea Space suggest that *The Stade* will complement their investments and activities, and should help to deliver some of the necessary changes that are required through attracting higher spending visitors to Hastings, widening cultural education and improving the local area with high quality well designed buildings and public space.

[3] This is the official ILO definition of unemployment, sourced from the Annual Population Survey.

Tourism Context

2.8 Hastings is predominantly a domestic leisure and holiday market; around 93 percent of visitors are British residents. Kent, Greater London, East Sussex and Essex are among the most popular counties of origin. Overseas visits are small in terms of volume but important in terms of value.

2.9 Over the past few years, domestic tourism in Hastings has declined[4]. From 2002 to 2005 domestic overnight trips decreased by 5 percent from 384,000 to 366,000. Tourist expenditure declined by 15 percent, primarily because of a shortening in the length of a staying trip combined with a reduction in the use of serviced accommodation.

2.10 86 percent of tourists are day visitors with only 14 percent staying overnight. According to the Hastings peak period visitor survey, on average, day visitors spend £17.83 per person per trip. This is significantly lower than the national figure of £27.70 per trip. One of the reasons for the prevalence of the day market is that seaside resorts are in general more popular destinations for day trips than large cities and towns.

2.11 Though far more significant in terms of numbers, day trips contribute significantly less to the visitor economy compared to staying trips. Although there are few overnight visitors, their spending is significantly higher (average visitor spend for staying visitors is £162.44) and account for half of all tourism spend in the town. This brings the average visitor spend in Hastings to £38.13. Higher spending staying visitors are attracted by facilities such as high quality arts and culture venues, restaurants and cafes, niche shopping and boutique hotels

2.12 The visitor market in Hastings is seasonal with the busiest period being June to September. During these four months, room occupancy is relatively level showing that visitors are not particularly constrained by the timing of the school holidays. This indicates a strong non-family element within the visitor base. Analysis of visitor postcodes suggests that two thirds of visitors to Hastings are from lower income groups and the remaining third from relatively affluent households.

Cultural Context

2.13 Employment growth in Hastings and Bexhill cultural sector, as defined by the Department for Culture, Media and Sport (DCMS), has been growing at a steady and healthy rate in the period from 1999[5]. This momentum has the potential to drive regeneration of the area, finding a place in the large and growing regional knowledge and creative economy of the South East, and addressing social inclusion, quality of life, and quality of place issues.

2.14 This overall economically positive picture, however, is offset by a number of countervailing factors or weaknesses which need to be addressed in appropriate policy and planning frameworks and settings. These include:

- While overall cultural sector employment increased by 25 percent between 1999 and 2004, this is heavily influenced by the 'demand side' of tourism and consumption-based cultural employment. The 'supply side' of new, innovative and distinctive creative cultural content and product is weak with only 1.3 percent growth in the same period. This is an imbalance which threatens sustainability of the cultural economy and places barriers in the way of entry to the creative knowledge economy and a distinctive re-branding of Hastings and Bexhill.

[4] The Picture of Tourism in Hastings 2005

[5] Hastings & Bexhill Cultural Mapping (May 2006)

- There appear to be only weak connections between the public funded cultural sector and the wider commercially-based activities which, together, make up what has been called the 'cultural ecosystem'. A coordinated strategy on the part of both local and regional agencies is necessary to manage the dynamic and interactive relationship between the subsidised and commercial components of the cultural sector in the form of, for example, cultural tourism initiatives, generation of new content and skills for the digital economy, place-making and place-marketing programmes and a new branding of the area 'beyond 1066'.
- While provisional mapping, both quantitative and qualitative, was undertaken for this report, the local knowledge and evidence base to inform policy and planning for sustainable cultural development in Hastings and Bexhill, remains significantly incomplete. More sustained mapping, research and consultation will be necessary on an ongoing basis to fill in the gaps and 'join the dots' of the whole cultural ecosystem, both public funded and commercial in order to assess the real impacts, both economic and social, of the Hastings and Bexhill cultural sector. This will involve audits – of skills, capacity, infrastructure, potential, and policy – and assessments of the contribution of culture in Hastings and Bexhill to tourism, inward investment, job-generation, social inclusion, entry to the knowledge economy, quality of life and 're-branding'.

2.15 The 2006 Cultural Mapping Exercise[6] suggested three strategic objectives in response to these weaknesses:

- Energising the cultural economy: positioning Hastings and Bexhill: The cultural sector needs to be understood - and resourced – as a special 'ecology' where subsidised and community organisations act as a 'talent pool' for the commercial sector (and vice versa), and as a resource for community capacity building with particular emphasis on developing creative and communications skills for the knowledge economy. Mechanisms need to be established to increase the synergies between commercial and subsidised sectors, especially in regeneration programmes and initiatives.
- Moving from subsidy to investment: entering the creative knowledge economy: There needs to be a policy and planning framework which sees the subsidised cultural sector in terms of investment and incubation strategies rather than the more traditional logic of subsidies. This is particularly important in view of the need for new and innovative cultural content in the digital new media environment. New financing and funding mechanisms need to be established to accommodate this shift in emphasis.
- Achieving policy co-ordination: towards a cultural plan for Hastings and Bexhill: There needs to be more integration between portfolio areas (economic development, planning, education, community and leisure) to develop an integrated, strategic and 'joined up' approach to the area's cultural resource base. This should be developed in both intergovernmental and intra-governmental contexts at local and regional levels. The Hastings and Bexhill Cultural Sector Group provides a basis for this and should give consideration to developing a strategic and integrated cultural plan for the area.

Strategic Fit

2.16 *The Stade* is a very good fit with the ambitions of a wide range of regional and local strategies and policies. The main points from a full review of the strategy and policy context for the project are summarised below.

[6] *Ibid*

Regional Strategies

The South East Regional Economic Strategy

2.17 Hastings lies within the Coastal South East sub region, which despite its environmental assets has seen continued economic and social decline. The RES recognises the need to invest in the potential of areas to lift underperformance by harnessing a range of opportunities including skills progression, innovation and creativity, economic upgrading, and culture and leisure-based growth. The South East RES objectives of particular relevant to *The Stade* are:

- Smart Growth – (job increases likely to be accompanied by minimal adverse environmental consequences) – *The Stade* will provide investment in the potential to lift the prospects of underperforming areas, communities and individuals. It will provide employment space and encouraging new businesses, skills development and inclusion
- Sustainable Prosperity – *The Stade* will enable more people to benefit from sustainable prosperity across the region and reducing polarisation between communities; it will involve the communities of Hastings in the urban renaissance of the town

2.18 The project will help achieve the RES' emphasis on the importance of investing in cultural infrastructure and developing a sustainable visitor economy (for example through encouraging off-peak visitors). The RES cross cutting theme of Culture, Sport and Creative Industries recognises the value of culture and creative industries (such as will be fostered by *The Stade*) as an economic catalyst.

Regional Spatial Strategy – Draft South East of England Plan

2.19 Hastings is designated as one of two regional hubs within the Sussex Coast Sub-region in the RSS. The RSS recognises the importance of cultural activities such as will be achieved by *The Stade* in driving 'smart growth' and how a rich and varied cultural 'landscape' is essential to delivering a competitive information led economy. It identifies how successful cultural policies can help regeneration and urban renaissance and can improve and enrich people's daily lives by promoting health including physical and mental well being. The RSS also stresses that cultural and community/education facility can provide lifelong learning and skills development in an environment that may be more suitable to groups excluded from or less able to access mainstream services.

2.20 *The Stade* fits with, or contributes to the following policies in particular:

- Policy CC9 – Addressing Intra-Regional Disparities which identifies the Sussex Coast as being in need of extensive regeneration
- Policy SCT1 – Core Sub-Regional Strategy which required local authorities and other agencies to pro-actively pursue the sustainable economic growth and regeneration of the Sussex Coast, enhancing its cultural and historic assets and promoting excellence in the design of new development
- Policy SCT2 – Enabling Economic Regeneration by promoting the social and economic regeneration of areas in greatest need including continuing the support given to Hastings / Bexhill
- Policy SCT6 – Co-ordination, leadership and promotion of the sub-region, developing and extending the work already undertaken in the Hastings & Bexhill Five Point Plan (see below) to deliver economic and social regeneration into the longer term and to capitalise on Hastings as a regional hub.

Coastal South East: A Framework for Action March 2008

2.21 SEEDA's Framework for Action supports the economic transformation of the Coastal South East sub-region (as identified in the Regional Economic Strategy) and is structured around three main priorities, all relevant to *The Stade*:

- A creative and inspirational coast, with high quality places in which to live, work, learn and invest
- An inclusive and connected coast with confident and ambitious communities and businesses
- A competitive coast with a strong economy.

2.22 The framework sets out the following action areas relevant to *The Stade* project:

- Coastal sites and new ways of living and working – Potentially key coastal locations could act as demonstration projects which harness economic potential. Over the long term an appropriate mix of high quality development can help to change perceptions of an area, particularly if intervention is planned to enhance existing assets (eg important public spaces like the Stade)
- Building economic competitiveness - In particular in the creative and cultural sector which in the Coastal South East is diverse, growing and important both in its own right and in contributing to quality of life and cohesive living places, and to the visitor economy where there is an opportunity to capitalise on the growing popularity of the coast as a destination for short visits by further development of cultural facilities and events

The Cultural Cornerstone - The South East Cultural Strategy - South East England Cultural Consortium (SEECC) 2001

2.23 The Strategy sees cultural investment and innovation as potentially the main engine of regeneration of urban communities in the South East. The Strategy sets out six challenges for the development of cultural activity in the region; those relevant to Hastings which *The Stade* will help to achieve are:

- The challenge of excellence including actions to achieve enhanced levels of artistic and general cultural performance; an example of high quality building design in regeneration projects; access to excellence for children and others through outreach activity
- The challenge of learning including the acceleration of the opening up of cultural facilities for informal learning such as the Jerwood Gallery
- The challenge of partnership and coherence – it is likely that *The Stade* will provide an example of a high profile, integrated project that will help to achieve the promotion of cultural tourism across the region and will provide more resources for communities to develop their own capacity for participation in cultural life

Tourism ExSEllence – Strategy for Tourism in the South East

2.24 *The Stade* programme of action should support the Regional Tourism Strategy's aim of maximising the benefits that tourism brings to the South East by creating a region which competes with the best, exceeds visitors' expectations, invests in products and service quality, fosters profitable tourism businesses, welcomes visitors and embraces tourism. In particular it will fulfill the key objective of providing an unrivalled experience for the visitor.

Local Strategies

Hastings Local Plan / Hastings Local Development Framework

2.25 Hastings Local Plan includes tourism policies to support tourist attractions and facilities, and specifically improvement of The Stade as a primary tourist destination.

The Local Plan is in the process of being replaced by the Local Development Framework (LDF) which is at the consultation stage. The LDF Core Strategy (currently out to consultation proposes a series of strategic objectives; those that *The Stade* may contribute to include:

- Objective 10: Enable an increased take-up of sports, leisure and cultural activities by residents and visitors through the provision of accessible and affordable facilities and programmes
- Objective 11: Improve the health and well being of the population, reduce crime and contribute to community cohesion by providing community/education facility, promoting 'secure by design' and establishing a network of open and green spaces that are easily reached by residents, and which promote biodiversity
- Objective 12: Enable the delivery of high quality and sustainably designed developments
- Objective 13: Promote, enhance and manage the town's unique cultural heritage, historic buildings and natural landscape; making best use of the town's individual character and environment, to contribute to economic regeneration

Sea Space - The Five Point Plan

2.26 The Five Point Plan is a strategy for achieving regeneration in Hastings and Bexhill through: Urban Renaissance, Business and Enterprise; Excellence in Education; Broadband; and Transport. At the core of the plan is investing in people through education-led regeneration – new provision at UCH and soon the new college at Station Plaza. Continued investment in urban renaissance should also help stimulate civic pride and raise local aspirations.

2.27 Tourism, creative industries (and culture indirectly) are just some of the sectors being supported through Sea Space (financial services, manufacturing, engineering emphasis high added value and quality jobs). Major infrastructure developments such as the Creative Media Centre, Innovation Centre, UCH, Profitnet and the Enterprise Hub are all here to support businesses. The creative sector business group being led by CMC acts as a sounding board for the sector. Networks such as Profitnet is key and CMC is hosting a business creative networking event in November focussing on learning and leads.

2.28 From an inward investment and tourism perspective the need to nurture the 'culture, heritage & leisure' capital that the area has to offer is recognised. The culture & heritage assets provide brand visibility and strengthens destination competitiveness be it for residents, business relocations, tourism or events.

2.29 The recently published destination management strategy and dms+ set out a vision for Hastings and Bexhill to capitalise on their appeal to visitors, potential residents and businesses as good places to live, work and invest and to promote the high quality of life this area has to offer.

Leading From the Front - Hastings and Bexhill Seafront Strategy May 2005

2.30 This Seafront Strategy is based on a series of principles which seek to promote positive change and regeneration of the seafront by:

- Attracting investment and new employment opportunities
- Advancing economic and social development
- Supporting a unique inviting urban and seafront environment

2.31 The Strategy area sets out six key 'zones of change' where the economic benefits of development could be maximised. One of these zones is The Stade / Rock-a-Nore, which is recognised as having the greatest potential to become the principal quality visitor and heritage destination in Hastings, where a greatly improved environment could be created for visitors and residents alike. The Strategy includes the following specific points for Stade/Rock-a-Nore which *The Stade* may enable:

- Removal of the existing car and coach parking facilities and replacement with a coach drop off area and other public visitor facilities
- Area wide environmental and townscape improvements …. providing stronger connections to the Old Town, Rock-a-Nore beach and the Country Park.

1066 Country Destination Management Strategy - 2005

2.32 The Destination Management Strategy (DMS) for '1066 Country' has a 10-year timeframe and sets out short, medium and long-term actions and recommendations which are aimed at facilitating the transformation of 1066 Country, in particular Hastings and Bexhill-on-Sea, into a 21st century destination which is desirable and vibrant 365 days a year.

2.33 Key objectives relevant to *The Stade* project include:

- Building on the track record of private / public sector partnership working established by the 1066 Country Marketing Partnership. This will require the agreement of an adequately resourced structure to deliver the action plan arising from the strategy
- Establishing 1066 Country as one of the country's year-round, premier short-break destinations based around an expanding core of quality accommodation, attractions and events
- Maximising employment opportunities arising from further development of the visitor economy
- Harnessing available resources for destination management as effectively as possible, and to attract additional support funding wherever feasible
- Developing the visitor economy in individual parts of 1066 Country in a complementary rather than competitive way

A Town That's Good to Live In – Hastings & St Leonard's Cultural Strategy 2003

2.34 This wide ranging Strategy firmly links culture, leisure, sport, health, community safety, tourism and employment. Produced by Hastings Borough Council, it aims to promote and develop the wealth of culture and character in Hastings. *The Stade* could help to fulfill many of the Cultural Strategy's goals, in particular:

- Attracting people and investment to Hastings – by creating a network of high quality open spaces; investing in good urban design and public art; creating facilities to attract more weekend break visitors; promoting more original street art and festivals
- Growing the cultural economy – by looking after existing creative industries and encouraging new creative businesses
- Improving the culture of learning – by building on the strong tradition of self help; supporting cultural projects which encourage young people to take up higher and further education
- Creating real access to culture – by increasing access by everyone to all forms of cultural activity; celebrating the cultural diversity of the town's communities

2.35 The Strategy recognises that in order to boost the local economy, both local and regional agencies wish to develop a knowledge-driven economy in which the emergent cultural and creative offer in the towns will play a key role in stimulating tourism and regeneration more generally. We would expect that *The Stade* will provide a huge boost to the cultural and creative facilities in the town.

Pride of Place - A Sustainable Community Strategy for East Sussex 2008-2026

2.36 This strategy sets out a long term vision for improving people's quality of life and creating strong communities within and across East Sussex. The characteristics of those communities that *The Stade* should help to encourage and support are:

- Vibrant, inclusive and safe: fair, tolerant and cohesive with a thriving culture and low crime
- Healthy: promoting healthy lifestyles, good health and well-being and independence
- Well designed and built: providing high quality places and spaces for people to live, work and spend their leisure time
- Prosperous: a thriving, diverse and sustainable economy
- Fair for everyone: equality of opportunity for all, including new communities, now and in the future

2.37 The county Community Strategy embraces all the local community strategies, including that of Hastings & St Leonards (which is set out below).

Hastings & St Leonard's Community Strategy 2003 - 2013 (updated in 2006)

2.38 The Community Strategy sets out the following vision for the town:

"The renaissance of Hastings through social, economic, cultural and environmental regeneration."

2.39 The key themes running through the Community Strategy are health, learning and skills, housing, regeneration and crime. In particular *The Stade* will help to achieve the following Strategy objectives:

- An economically successful town - by achieving business investment through an urban renaissance that makes the town an even more attractive and exciting place, adding the best of new architecture
- A learning town – by encouraging people of all ages to continue learning, raising their aspirations and inspiring them to extend their achievements
- An inclusive town – by ensuring that the community is fully involved in new developments and that they have equal opportunities to access new services and facilities
- A town that is good to live in – by investing in cultural activity to improve people's quality of life, by ensuring that facilities are fully inclusive through celebrating the diversity of cultures among its ethnic minority communities

Hastings Community Cohesion Action Plan 2006- 2009 - "Going the Extra Mile"

2.40 Hastings Community Cohesion Action Plan sets out the priority actions that need to be addressed to support community cohesion in Hastings. *The Stade* can help to achieve a town that people feel is good to live in by increasing the proportion of households that have access to a high quality public open space that they value, and where arts, sports and play activities are developed to increase the number of people who feel that leisure and cultural activity in Hastings reflects the aspirations of their community and lifestyle whatever their age or cultural background.

Hastings Borough Council- Arts Development Strategy and Action Plan:

2.41 The vitality of the local arts scene is one of the things that give Hastings its unique regional identity, and Hastings Borough Council recognises that it has a key role in ensuring that the Arts in the Borough continues to thrive, for example by developing cultural facilities such as will be provided by *The Stade*. Artists and arts organisations have demonstrated their capacity to help improve the quality of the town's environment, to contribute to the healthy living of its population, and to support economic development and community safety work.

Conclusions

2.42 Hastings is currently the second most deprived seaside town in England after Blackpool, and it faces the major social and economic challenges that are particularly prevalent in coastal resorts around the country. However it is undergoing significant regeneration with the aim of diversifying its economy and allowing the town's communities to benefit from educational, economic and culture opportunities.

2.43 *The Stade* project is an excellent fit with strategies and policies at regional and local level and will help to achieve the ambitions of economic, social, cultural and tourism plans.

2.44 In terms of Hastings as a whole, the gallery and the provision of a new public space for the town would contribute strongly to regeneration, enhancing the local economy and quality of life in a range of ways. The scheme would contribute to raising aspirations in the community and in particular among young people. It would contribute to changing public perceptions of Hastings both internally and externally, creating a stronger sense of local pride and identity.

2.45 The proposals would support the continued development and success of the creative industries in Hastings and help to build a stronger visitor offer based around the creative sector. It would contribute to economic diversification in the town and could also benefit the fishing industry through creating an association with higher-value activities and a sense of place. It would contribute strongly to education within the area at all levels and could build good links with the new college in the town.

3 IMPACTS OF CULTURAL ATTRACTIONS AND PUBLIC REALM

Introduction

3.1 The virtues of cultural attractions and public realm to the economy are well reported. Extensive research has been carried out on this and explanations have been given on how they can influence the performance and assist in the regeneration of local areas.

3.2 Not least, they generate:

- Place marketing – eg, RIBA award winning Jubilee library in Brighton
- Property-led regeneration – eg, Hoxton Square
- Experience economies - which bring tourism & discretionary spend, eg, Convent Garden,
- Social inclusion and local employment - drawing on 'natural skills' and 'learned skills'.

3.3 In this chapter, we look at some of the research into the impacts of cultural attractions and public realm improvements and how this impact has been measured. This includes evidence from other studies and theories of change in relation to their catalytic impacts.

Measuring the Economic Effects of Cultural Products

3.4 Cultural uplift (diffused by products such as galleries, better public realm and education) aims to bring (positive) changes to a particular area by any or a combination of social, economic and environmental improvements. Such positive transformations in a locality where decline in social, economic or environmental has occurred can be termed "regeneration". After a thorough review of literature, three models of cultural/public realm changes and their incorporation or association with regeneration have been identified. This includes:

- *Culture-led regeneration* - this model places culture at the centre of the change process citing it as the catalyst and engine of regeneration. Examples include the building or refurbishment of one or many buildings for public or business use (e.g. Tate Modern in Southwark), repossession of open space (e.g. garden festivals of the 1980s/90s in Ebbw Vale) and introducing a cultural activity which then re-brands a place (e.g. Ulverston Festival Town).
- *Cultural regeneration* - here, cultural activity is 'part of a package'. It is fully integrated along with other economic, social or environmental activities not related to culture, into the strategy of a particular locality. A prime example is the renaissance of Brindley Place in Birmingham.
- Culture and regeneration - although present, culture is not fully integrated into the development strategy in a locality. It is coined as 'small-scaled intervention' or an 'add-on' in this instance, and can sometimes arise at a later stage of the initial regeneration process. Examples include a public art programme for a business park or appointing artists to design street signs and furniture.

3.5 The models above provide a strong framework to determine the role of culture in regeneration. This categorisation often helps to assess the potential impacts to be expected from cultural activities and their importance in the overall development strategy.

3.6 However, measuring the economic effects of cultural change can be a difficult task. For instance, it is difficult to quantify improvements in welfare from improved quality of life or perception associated with such developments. Nevertheless, three different types of economic impacts of a cultural asset can be identified and assessed. Total economic impact is the cumulative effect of the impacts below: [7]

- Firstly, there is a consumption value received by both, users and non-users of the asset. For users, this means calculating expenditure on using the asset (i.e. ticket price for a museum) as well as related expenditure (i.e. travel expenses to get there). For non-users, the value will equate to the derived benefits of improved quality of life in the area.
- Second, there is a short-term impact which can be measured in terms of output, jobs created and income. Further, this includes indirect multiplier effects due to increased spending in the area.
- Third, a long-term (catalytic) impact may exist and can be measured using hedonic analysis. This refers to the rise in economic development and productivity and includes the rise in property prices (i.e. value of a place) in the location of the cultural asset as a result or new investment.

3.7 These are the effects which are analysed in determining the economic impact of the cultural-related activities. The first two of these three effects are easily measured against real projects, and below we review a number of case study cultural attractions to identify the value of their impact to their local area. In Chapter 4 we attempt to forecast these impacts in relation to *The Stade* programme. The third effect – longer term/catalytic effect - is not so easily measured because of less certain causal links between investment in cultural products and wider outcomes. But there is a wealth of research demonstrating the wider economic changes within areas following investment in cultural and public realm products. We discuss these below to help our understanding of the likely wider catalytic economic changes in Hastings following the development of *The Stade*.

Direct, Indirect and Induced Economic Impacts of Cultural Products

3.8 This section presents evidence by drawing on similar projects in order to provide a foundation for forecasting the impact of *The Stade*. Selected cases are presented below to provide an evidence base for culture-related investment.

De La Warr Pavilion, Bexhill[8]

3.9 De La Warr Pavilion (DLWP) was reopened in October 2005 after a £9mn refurbishment programme. It is regarded as an important component to Bexhill's generation to act as a catalyst to foster a new visitor economy and promote the development of a prosperous creative industries sector in the area. DLWP aims to deliver high quality exhibitions, performances and education in the field of contemporary art.

3.10 Establishing itself as a cultural destination, DLWP has managed to attract a range of visitors into the region. Estimates reveal that the visitors and the pavilion have added over £ 11.7mn to the region's economy and generated further economic activity of around £4.5 mn.

3.11 Approximately 576,000 visits to DWLP took place in one year (April 2006 to March 2007) of which 72.7 percent are estimated to have been made by people outside the

[7] Seaman, B. (2003), *Economic Impact of the Arts*, in *A Handbook of Cultural Economics* (Ed. R. Towse), Cheltenham, Elgar

[8] Most of the information reported here is sourced from SAM and the University of Brighton (2007), *Creative Impact - De La Warr Pavillion Economic Impact Evaluation* , for Sea Space

Rother district. Together, these visitors spent over £4mn in Rother, especially in the hospitality and retail sector.

3.12 Through a visitor survey that was carried out, it was found that 74.4 percent of non-Rother resident respondents stated that they had come to Bexhill specifically to visit the DLWP. Of the non-resident visitors in general, 28.6 percent had come from London and outside the South East, a high proportion relative to other major cultural attractions in Sussex. Further, from this total,

3.13 Of the 311,551 non-Rother resident visitors that came to visit Bexhill specifically for DLWP, approximately 15 percent of this figure generated an overnight stay in the Rother district.

3.14 Although the average secondary spend per visitor in the Rother district is around £15, DLWP visitors' (excluding residents of Rother) average secondary spend is estimated to be more than twice that figure at £34.54 The total impact of DLWP visitors based on secondary spend was estimated to be £14.67mn of which over £4mn was retained in the Rother Economy.

3.15 DLWP is responsible for employing 77 staff located in the Bexhill and wider Rother region. It further provides employment opportunities for artists and professionals through its artistic programme.

3.16 In terms of expenditure, over £1.6mn was spent by DLWP in the same one year period (April 2006 to March 2007) of which, £267,000 was retained in Rother's economy.

3.17 Overall, the DLWP has helped create a positive profile for Bexhill and Rother for non-residents and residents. The media coverage of DLWP further enhanced this perspective and helped expand the visitor economy. The pavilion plays an important role in boosting tourism in the area.

3.18 The creative economy itself has greatly benefited from the DLWP. There have been 60 artists who have shown work; 198 artists have benefited from the professional development programmes; 133 designers and makers have benefited from training workshops and seminars; eight new publications have been created; 12 new partnerships have been fostered with major national and international cultural innovators. DLWP further supports learning and skills development in which large number attendees benefit from relevant events.

3.19 On the whole, total contribution to the national economy made by DLWP with multipliers by following its income and expenditure flow amounts to £16.15mn in the year from April 2006 to March 2007. Of this figure, approximately £6.3mn was retained within the Rother Economy.

Tate St. Ives

3.20 Tate St. Ives offers a well known example of a reputable art gallery investing in a resort town, and a useful example to documents in terms of the impacts it has generated to St Ives where it is located.

3.21 In 1993 the Tate St Ives art gallery opened on the sea front overlooking Porthmeor beach. The modern building exhibits modern and contemporary Cornish artwork or artwork associated with Cornwall. The displays are changed regularly and do include work from non-Cornish artists. The gallery facilities include a shop, café and parent and baby room.

3.22 A broad programme of events are run by the gallery, these include music performances, films, talks and discussions, family orientated holiday activities, artistry courses and workshops. Groups of visitors, both of school age and above can take advantage of guided activities and tours, however, school visits can also receive free materials to conduct self-guided tours.

3.23 The original build cost for the Tate St Ives was £3.3mn; this was funded by Cornwall County Council, EU funding and private sector money. The gallery now receives 35 percent of its funding from the Department of Culture, Media and Sport; the remaining 65 percent is raised through admissions, the bookshop, café, commercial sponsorship, trusts and foundations, donations, membership and the Tate St Ives print series.

3.24 Original estimates of 75,000 visitors a year have been exceeded dramatically; on average the gallery now receives 240,000 visitors a year, including some 24,000 of learners. The gallery has a £5.75 entrance charge although members of the local community can take advantage of special dates when they can enter the gallery for free. The gallery's success has been in attracting 78 percent of visits from outside Cornwall and an estimated 15 percent were from overseas.[9] 58 percent percent of visitors said the galley was their main reason for visiting Cornwall on that trip.

3.25 Starting with six permanent staff, there is now more than ten times this number directly employed at the gallery.

3.26 According to research for English Heritage and CABE[10], it was noted that there was some early opposition to the idea of a large gallery, but businesses were quick to see the potential economic benefits that it brought. This includes "…year-round activity and employment, new restaurants and cafes, a growing number of galleries, craft and jewellery shops and rising house prices"[11]. Studies carried out for Cornwall County Council found that 70 per cent of businesses surveyed believed that the gallery had benefitted their trade and 85 per cent felt the gallery had benefited the town. In 1994 Tate St Ives was estimated to be bringing £16mn a year to the Cornish economy. In 2005, this was revised to £20mn.

3.27 Plans to expand and enhance the visitor offer have been developed in order to cope with the problems caused by the unexpectedly large visitor numbers. The partners for this project are Cornwall County Council, Penwith District Council and Tate St Ives. The plans have been drawn up in consultation with the local community; they are however, on hold. This is because the favoured option – to expand onto a car park above the building – would decrease the town's parking capacity by 79 bays. The project partners are awaiting the release of the town's parking strategy, which will indicate whether or not the loss of the parking spaces can be withstood.

Dundee Contemporary Arts Centre

3.28 An evaluation of the recently developed Dundee Arts Centre took place in 2003[12]. The study found a positive economic impact not only on the local area, but stretching beyond Dundee. Key findings included:

- 258 full time equivalent jobs had been generated, as opposed to the initial estimate of 58;
- Boosted the incomes of local craft producers whose products were sold in the shop;
- Analysis showed that the DCA's payroll of £561,507 generated a net impact of an additional £3,620,000 in the Tayside economy – a leverage ratio of almost 6.5 to 1.

Evaluation of the National Maritime Museum Cornwall and Discovery Quay

3.29 The National Maritime Museum, Cornwall (NMMC) and the Discovery Quay project was originated by English Partnerships (EP), which sought to capitalise on the opportunity of reusing a waterfront site near Falmouth Docks. The project aim is set

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[9] English Heritage & CABE, *Shifting sands: design and the changing image of English seaside towns* , 2003

[10] *Ibid*

[11] *Ibid, p29.*

[12] Ruiz, J. (2004), *A Literature Review of the Evidence Base for Culture, the Arts and Sport Policy*, Scottish Executive Education Department

out in the South West Regional Development Agency (SWRDA) Board Paper (June 2002) 'To improve the tourism offer in the town, building on its maritime heritage…it will make a vital contribution to Cornwall's tourism offer with associated benefits to the local economy. The total investment in NMMC and Discovery Quay has been £39.6mn of which approximately £25.1mn was invested in the Museum and £9.7mn on the construction of the marina and associated retail, office and leisure developments.

3.30 The NMMC is a museum conserving and exhibiting a collection of boats, other artefacts and Cornwall's maritime history for the enjoyment of visitors. It employs 38 FTEs in the museum. There were 107,000 visitors to the Museum in 2007-8. It appears that visitor numbers have stabilised at around this level following substantial visitor volumes when the Museum was first opened.

3.31 Findings from an RTP visitor survey of 312 non-Falmouth responders suggest that it is a stronger driver for tourism than anticipated. The survey of visitors to the NMMC found that nearly three-quarters (73 percent) were aware of the NMMC when planning their trip from home, and 57 percent planned to visit the NMMC. The same proportion of visitors to Discovery Quay was aware of the NMMC and 31 percent planned to visit the Museum. In Falmouth town centre, two-thirds of visitors were aware of the NMMC and one in five planned to visit. These figures suggest that tourists are generally aware of the NMMC before taking their trip to Falmouth, which suggests that the NMMC is helping to improve the tourism offer of Falmouth and possibly Cornwall.

3.32 To date more than 300,000 new visitors to Falmouth may be attributable to the NMMC. The vast majority of these new visitors are staying visitors, and nearly all travelled from outside Cornwall, and more than half from outside the South West region.

3.33 Visits to the NMMC generated £6.7mn of net additional income per year to the Falmouth economy, supporting 136 FTE. Since opening in 2003 to 2007, the project is estimated to have generated a net additional visitor spend of £36.8mn (in 2006 prices) in the local area. After allowing for leakage, displacement and deadweight, the visitor spending supported 136 net (direct and indirect) FTE jobs in Falmouth. 17 of these jobs were directly employed at the NMMC, and the remaining 119 jobs would be supported elsewhere in Falmouth.

3.34 It is estimated by South West Observatory[13], using 2003 South West Regional Accounts, that an FTE job in Cornwall and the Isle of Scilly contributes on average £28,700 in gross value added (GVA) output per year. After grossing to 2008 value, it was found that the NMMC and Discovery Quay project contributed a further £7mn to the Falmouth economy in 2008.

3.35 In addition to the direct outputs from the development, there have been a number of positive outcomes that have resulted from the development. The NMMC and Discovery Quay are considered to have helped to stimulate an added vitality within the town centre of Falmouth and its tourism economy and to have contributed to enhancing the tourism offer for Cornwall.

Economic Impact of Museums & Galleries in the South West

3.36 In 2000, the South West Economy Centre assessed the economic impact of museums in the South West economy[14]. Key findings included:

- Approximately 12 percent of registered museums in the UK are found in the SW attracting 8 percent of all UK museum visits (4.8mn in 1998)

[13] See: http://www.southwestid.org.uk/download/4149492c18a30f1d0118a390e8a10001/Sub-reg%20feb08.pdf

[14] South West Economy Centre (2000), *The Economic Contribution of Museums in the South West,* South West Museums Council

- Total income received by the sector during this period was around £29.1mn (excluding the cost of goods for resale). This includes public sector and other grants, with grants amounting to 38 percent of total income.
- Museums purchased goods and services (excluding those for resale) with a total value of around £10.3mn during 1998, around £7.3mn (71 percent) of which accrued to suppliers within the South West.
- Total museum-related tourist spending in the SW was £27.5mn; this spending supported around 680 full time equivalent jobs and contributed approximately £13.5mn to the South West's gross domestic product (GDP).
- Around 1,360 local jobs were directly or indirectly associated with museum operations.

3.37 Although a total of 4,832 people were working in SW museums, 73 percent of them were volunteers. Approximately 1,000 fulltime equivalent *paid* jobs existed, suggesting a volunteer to paid employment of 5 to 1.

Museums in the South East

3.38 RTP recently (2008) undertook a study for the Museums, Archives and Libraries Council South East regarding the contribution of Museums, Archives and Libraries in the region. It aimed to address two key issues:

- How does the sector add to the tourism product? – The extent to which the sector forms part of the core product attracting both domestic and overseas visitors to the UK?
- How much does the sector contribute to the regional and local economy through direct and indirect visitor expenditure?

3.39 Turning to the key economic output, employment, museums in the South East supported 4,090 paid (full time & part time) jobs. The study found that tourist visitors to museums, libraries and archives spend £229,981,260 in the South East's visitor economy. The vast majority of this expenditure is attributed to museum visits (£223,974,525 or 97 percent). Employment directly supported by visitor off-site expenditure amounts to 3,224. Indirect and induced employment is estimated to be 1,369. Overall, total employment brought by 235 museums in the South East is 8,683.

Wider Catalytic Impacts of Cultural Products

3.40 As we noted in the introduction, there are other issues to consider that are immeasurable impacts brought by cultural activities and in particular public realm improvements. For instance, the impact of that the Angel has had on Gateshead Quays is not a conventional cultural development which can be assessed using the measurements in the previous example. It does not directly employ anyone or generate any direct visitor spend. Further, it has no suppliers to whom indirect benefits can accrue. However, its presence has caused the North East, and in particular Gateshead, to become a focal point for new investment.

3.41 In Gateshead a new £46mn art gallery and £70mn music centre was developed. This was further boosted by £100mn in private investment in commercial, residential, leisure and office space generating around it. New developments include a £250mn Baltic Business Park and Knowledge campus estimated to bring 5,000 – 10,000 new jobs.

3.42 The discussion of the impact of the Angel makes an important point about determining the economic impact of a cultural activity/development. Although no direct impact can be traced to the Angel, the 'real' economic effects must be considered in order to fully assess the impact of initial cultural development. Therefore, one must look beyond the project under consideration to determine its overall economic impact.

3.43 After extensive qualitative and quantitative research, national and international, ECOTEC[15] conclude that "Investment in the public realm generates 'economic benefit streams' that translate into 'economic impact' through a number of mechanisms:

- Attracting investment
- Increasing land and property values
- Attracting visitors
- Increasing tourism
- Improving productivity
- Enhancing image."

3.44 This conclusion simplifies the mechanisms by which good urban design adds the following economic values, as demonstrated in *The Value of Urban Design*[16]:

- Producing high returns on investments (good rental returns and enhanced capital values)
- Placing developments above local competition at little cost
- Helping to deliver more lettable area (higher densities)
- Reducing management, maintenance, energy and security costs
- Contributing to more contented and productive workforces
- Supporting the 'life giving' mixed-use elements in developments
- Differentiating places and raising their prestige
- Opening up investment opportunities, raising confidence in development opportunities and attracting grant monies.

3.45 The following paragraphs give illustrations of how the above 'mechanisms' translate into economic benefits.

Attracting Investment

3.46 High quality public realm is fundamental in encouraging people to spend time in a town centre; a well populated, active town centre is, in turn, essential to its economic and social regeneration. Broadly, the more active a town centre is, the higher economic activity is likely to be.[17] The more pleasant and vibrant an urban area is, the more appealing it will be to investors, who are more likely to thrive in such an environment.

3.47 Birmingham wanted to attract major service industry companies, and succeeded in doing so by investing in creating good public spaces in the form of a web of new streets and squares which are a pleasant to be[18].

3.48 In Sheffield the £130mn 'Heart of the City' mixed-use development project included the refurbishment of the Grade I listed town hall and the public space around it. New gardens and two further public squares, St Paul's Place and the Millennium Square have been created, as well as the cultural heart of the City which comprises the Peace Garden, the Millennium Gallery, and the new Winter Gardens. This public realm investment, as part of the mixed-use development project, has assisted in encouraging

[15] *Ibid*
[16] CABE and DETR (2001) *The Value of Urban Design*
[17] CABE and DCMS (2006) *Better Public Building*
[18] CABE (2006), *The Value Handbook - Getting the Most from Your Buildings and Spaces*

private commercial investment in the form of a new hotel, luxury apartments and 85,000 square metres of retail space[19].

3.49 Heritage-led public realm improvements in St Anne's on Sea, Lancashire, have led to a new confidence in this coastal town, which has led to a drop in retail unit vacancy rates from 25 percent to 4 percent. The environmental regeneration has led to the creation of 50 jobs; six new business start-ups; 63 jobs safeguarded and the improvement of 5,000 m^2 of commercial space. The public sector investment totalled £4mn and the subsequent private sector investment reached as much as £20mn[20].

3.50 The Jubilee Street Library investment in a degenerated area of Brighton has built a strong momentum for further investment in adjacent and neighbouring blocks through catalytic impacts. According to a report in early 2005 by Hill-Smith Associates, the initial investment in the redeveloped library of £1.6mn would prompt further upgrading in the immediate area worth an estimated £4.2mn over the next five years. This is a leverage ratio of 2.6 of the original public sector investment. On top of this is the increased revenue generated through visitor spending and multiplier effects, which the original assessment suggested would total some £17-20mn per year. With more than three years passed, the development of the immediate area to the new library has shown significant momentum and improvement, and the expectation is that the private sector investment will have exceeded the original assessment by some way. Effectively a new hub of activity has grown, developing a vibrant new quarter and community in Brighton.

Increasing Land and Property Values

3.51 The exchange value of land and property is measured by the price that the market dictates through its readiness or reluctance to pay. The price a market is willing to pay is influenced by many factors[21]. The influence that good design in the public realm has on market price is particularly difficult to measure.

3.52 Sheffield's 'Heart of the City' project demonstrates the link between improvement to public realm and increases in property value. The first commercial office building at the new St Paul's Place was pre-let at a record rental level for the city.

3.53 *Does Money Grow on Trees*[22] also highlights the importance of public green spaces and parks in increasing the commercial value of property. ECOTEC[23] reviewed several pieces of national and international evidence and concluded that good quality natural environment can increase land values by approximately 17 percent and property prices by a 15 percent average.

3.54 Research in the United States of America indicates a staggering 220 percent increase in the rental values of buildings adjacent to the refurbished Bryant Park in the heavily urbanised environment of New York[24].

Attracting Visitors

3.55 The experience people have of public space influences their desire to stay or visit a place for any length of time. This is exemplified by the public realm works in Coventry, where increased pedestrianisation, a new civic square, clearer signage and better placement of street furniture have increased visits to the city centre by 25 percent on

[19] *Ibid*

[20] English Heritage & Urban Practitioners (2007) *An Asset and a Challenge; Heritage and Regeneration in Coastal Towns in England*

[21] *Ibid*

[22] CABE (2005), *Does Money Grow on Trees*

[23] ECOTEC (2007) *Economic Impact of Public Realm*, for East Midlands Development Agency

[24] Thomas, H. Poughkeepsie, Dutchess County Planning Department, USA (1991), *The Economic Benefits of Land Conservation*, cited in CABE (2005) *Does Money Grow on Trees*,.

Saturdays. The more pleasant a place is, the more likely people are going to be to want to visit[25].

3.56 Public realm improvements to Plymouth's Armada Way have created a more understandable city centre that promotes safe and easy access for pedestrians. This more pleasant streetscape, and a new public square, which has encouraged markets, has attracted increased numbers of visitors to the city centre[26].

3.57 Improvements to Leicester city centre's public realm have included contemporary signage, lighting, street furniture and a pedestrianisation scheme. These enhancements, along with the John Lewis store they attracted, have encouraged more people to visit and spend time in the city centre, which has, in turn, encouraged the establishment of a café culture, and an increase in footfall and trade[27].

Increasing Tourism

3.58 Investment in the public realm is important to coastal towns that often rely on a visitor economy. However, as the *Shifting Sands – Design and the Changing Image of English Seaside Towns (English Heritage & CABE, 2003)* states, the regeneration of towns must be for 'living communities', as places where people want to live are places that people will want to visit.

3.59 Tower Gardens in Skegness was formerly the seaside resort's Pleasure Garden. It had fallen into a state of dilapidation which had led to poor accessibility and health and safety issues. The restoration of this public space has created a toddlers' play area, an adventure play area/fitness trail, lake, floral beds, toilets and retail units. The subsequent events programme for the park attracted 13,820 attendees to 81 events in summer 2006. The park and events provide a space and activities that are free for local residents to use, but also form an important part of Skegness' tourism offer[28].

3.60 Hastings is a seaside town that relied heavily on tourism, and was hit hard by the decline of seaside tourism in the 1970s leading to multiple deprivation in parts of the town. A heritage-led regeneration scheme has included improvements to the public realm, in particular to the Trinity Triangle, which is the retail core of the town centre. These improvements have encouraged a café culture and the beginnings of a restaurant economy. It has been recognised that such high quality, cultural improvements are needed in Hastings, in order to attract a broader range of visitors who are likely to provide the higher spend that is needed by the local economy[29].

Improving Productivity

3.61 Quality of environment has an impact on quality of life, which in turn impacts on the productivity of the workforce. This has been observed at Castle Wharf in Nottingham where a mixed-use development with a good proportion of public realm improvements, created an environment that was pleasant and attractive for workers. Two businesses located at Castle Wharf surveyed their workforce and found that health and satisfaction had increased; absenteeism and staff turnover had decreased and productivity was higher[30].

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[25] DCMS & CABE, (2006), *Better Public Building*

[26] ECOTEC (2007), *op cit*

[27] *Ibid*

[28] *Ibid*

[29] English Heritage & Urban Practitioners (2007), *An Asset and a Challenge; Heritage and Regeneration in Coastal Towns in England*

[30] ECOTEC (2007), *op cit*

Enhancing Image

3.62 The location of a business contributes to its image or corporate branding; a high quality location will assist in creating a high quality image and therefore will attract higher value industries. The condition of the public realm influences the perception that both local communities and visitors have of towns.

3.63 Bournemouth's town centre was regenerated to give the public a safe and comfortable environment at what was once a busy traffic and pedestrian junction. Traffic was removed from the centre by a relief road and a 13,500m^2 square has been augmented with public art and a café/camera obscura. This has not only created a safe passage for pedestrians through the town centre, but has provided a place where people are likely to stop and spend time. The project has kick-started further regeneration and changed Bournemouth's image from family seaside resort to a fashionable centre for young people. This is to such an extent that the university, art college and language schools in Bournemouth and Poole have experienced an 'influx' of students[31].

Social and Environmental Benefits

3.64 As already stated, high quality public realm has positive social and environmental benefits. *The Value of Urban Design (CABE & DETR, 2001)* shows that good urban design adds social and environmental value by:

- Creating well connected, inclusive and accessible new places
- Delivering mixed-use environments with a broad range of facilities and amenities available to all
- Enhancing the sense of safety and security within and beyond developments
- Returning inaccessible or run down areas and amenities to beneficial public use
- Boosting civic pride and enhancing civic image
- Creating more energy efficient and less polluting development

3.65 The social value of the public realm is related to how high quality spaces can encourage people to interact in a co-operative, supportive and mutual manner[32]. Places that are well-designed foster a sense of safety, security and pride of place in the local community.

3.66 Improvements to the public realm were undertaken in Stroud specifically to promote safe, secure public spaces in a town which had previously suffered from high levels of crime and anti-social behaviour. The improvements included the redevelopment of the town square, signposting and permanent public art, good quality street lighting and a new skate park. The quantitative results are demonstrated by the fact that annual burglary figures have been halved and shop theft has decreased by a quarter.

3.67 Less tangible, but no less important, results are seen in the strong inclusive community feel that has been brought to the town – young people are still seen congregating in the town centre on weekend evenings, however they are no longer a nuisance. The benefits of this project go beyond the social to the economic, as Stroud has seen an increase in the number of residential units and business investments in the town centre. This in turn, reinforces the safety of the town by increasing activity and therefore natural surveillance[33].

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[31] English Heritage & CABE (2003), *Shifting Sands - Design and the Changing Image of English Seaside Towns*

[32] CABE (2006), *op cit*

[33] ODPM (2004), *Safer Places - The Planning System and Crime Prevention*

3.68 High quality public realm which values the historic environment and provides modern design strengthens local distinctiveness and so adds cultural value to a place[34]. Cultural value benefits the local community by providing a sense of place and a pride in the place.

3.69 A good sense of civic pride, created by the feeling of identity with a place, decreases crime and vandalism and increases the opportunities to develop a thriving community united by and committed to the place in which they live. The distinctive local atmosphere that can be created by a distinctive environment and a thriving local community will be attractive to investors, visitors and tourists alike.

3.70 INHERIT was an INTERREG IIIC project whose aim was to understand the underlying processes that underpin successful heritage regeneration. A case study within the project of a World Heritage Site in Ubeda, Andalucia, demonstrates how heritage led regeneration of public space can lead to social and economic gains. A comprehensive plan of improvements to a degraded public space included the regeneration of 23 squares, streets and public areas. Quality design, materials and modernisation of infrastructure led to an improved public realm which encouraged wider regeneration through the restoration of 68 houses leading to the city centre, and the creation of 32 new businesses. The city centre population increased by 3 percent and the quality of life and social interaction has been enhanced. The English Heritage *'Conservation Principles' (2007)* state, the historic environment" is a social and economic asset and a resource for learning and enjoyment".

3.71 Government guidance, PPS1,[35] states "*the condition of our surroundings has a direct impact on the quality of life and the conservation and improvement of the natural and built environment brings social and economic benefit for local communities*." The Statement makes it clear that the high quality design is important in the creation of sustainable public space.

3.72 Green spaces in particular have social and environmental benefits which increase a community's quality of life. This is achieved through providing health and ecological benefits, such as making somewhere available to take exercise and support local biodiversity[36]. When the community is involved in improving or maintaining green spaces or public realm in general, it creates a sense of community cohesion and empowerment, which has been shown to assist in developing schemes that are suitable and sustainable in the long-term[37].

Conclusions

3.73 The cultural sector and changes in public realm have been analysed over time in a variety of regions and for a number of sub-categories to determine its economic impact in a locality. The evidence suggests that their development and operation produce very positive impacts.

3.74 The impacts of cultural attractions and public realm translate from visitor spending into employment, direct, indirect and induced. The effects may potentially ripple on to the local economy, in terms of increased output and improved quality of life. This, however, depends upon the type of culture-related activity being put forward along with the local context in which it is being applied and the response of the residents (and visitors) and local businesses in terms of capacity and capability for capturing benefits.

3.75 The very nature of cultural and public realm improvements means that it they form an asset for not only businesses but the people that inhabit it. Therefore, the social and

[34] CABE (2006), *op cit*

[35] ODPM (2005), *Planning Policy Statement 1 - Delivering Sustainable Development*

[36] DTLR (2002), *Green Spaces, Better Places*

[37] ODPM (2002), *Living Places: Cleaner, Safer, Greener*

environmental benefits are interconnected with the economic benefits. These will include building an identity/brand that instils confidence in a place. These are not so easy to measure or they have long term effects yet to be measured. But following a logic chain process, it can be expected that the higher the quality of improvements, the higher the quality of life the communities that inhabit it will have. This positive experience of space encourages civic pride, which in turn is attractive to investors; which are known as catalytic impacts.

3.76 In the next chapter we draw on this information in forecasting the economic impact of *The Stade* programme, followed by later chapters looking at the potential for cultural, community and environmental impacts.

4 ECONOMIC IMPACT OF *THE STADE*

Introduction

4.1 In this section we set out a quantitative model of the potential impact that *The Stade* may have in terms of revenue generation (i.e. local spending), additional jobs that are likely to be filled by Hasting's residents, and the level of gross value added or GVA to the Hastings economy (i.e. salaries plus profit earned locally).

4.2 We forecast the annual stable year impact based on the following:

- Capital spending on constructing the Gallery and associated public realm improvements;
- Direct project revenue and local jobs;
- Indirect project spending through local purchases on goods and services;
- Induced spending from additional visits to the Stade;
- Induced spending in the local economy from second round multiplier effects; and
- Additionality of economic impact, allowing for deadweight, displacement and leakage of impact from the Hastings economy.

4.3 Owing to the absence of a real project, a number of assumptions from the business plan and other sources have been used to forecast this quantified impact. These are set out in Appendix 2.

4.4 Later in this chapter we also look at the influence that *The Stade* may have on achieving some of the more immeasurable catalytic benefits, and the perceptions of local businesses and local stakeholders.

Gross Direct Impact

4.5 The direct impact of *The Stade* relates to the revenue used to support the individual elements of the programme, and the jobs that this revenue supports. In this we include the initial spending in constructing the *The Stade* projects. In total, the forecast direct impact is nearly £2mn in annual revenue that will support some 30 local jobs. The summary of direct impacts is given in Table 4.1 which is then followed by further explanations on how these impacts were derived.

Table 4.1 Summary of Direct Impact

	Revenue	Local Jobs
The Stade (construction)	£863,800	4.4
Jerwood Gallery	£553,350	15.3
Jerwood Gallery Cafe	£90,000	2.1
Stade Square (events management)	£78,413	1.0
Stade Café	£303,499	7.1
Community/education facility	£20,178	0.5
Total	**£1,909,240**	**30.4**

Source: RTP

Construction

4.6 Direct outputs from *The Stade* proposals include construction jobs from building the Jerwood Gallery, Stade café, community/education facility, WCs, Stade Square and other public realm improvements.

4.7 Total capital costs (including fees) for *The Stade* works in Hastings are estimated at £8.638mn. Based on turnover per employee data for construction[38] and HM Treasury guidance suggesting that 1 permanent job = 10 construction years, then this supports 4.4 additional jobs.

Jerwood Gallery

4.8 Jerwood's direct impact is the revenue from visitors and spending on labour by the Gallery. Revenue will be raised through entrance fees.

4.9 We estimate this using the Jerwood Gallery Business Plan assumption that the local residents' entrance fee will be £2 and non-resident visitors pay £5. The Business Plan has an indicative forecast for 150,000 gallery visits per annum and an assumption that 15 percent of these visits will be school-aged children. Based on evidence from the Tate Gallery St. Ives, we assume that 78 percent of visitors will be non-local (this is only marginally more than the share of visits to the De La Warr Pavillion (73%) where resident visitors are more likely because there is no entrance charge). After discounting for the number of school-aged children visits, the annual revenue generated by the gallery is estimated to be some £553,000. A further £90,000 of revenue is expected from the operation of a (30 cover) café within the gallery (operated as a franchise).

4.10 We are advised by Jerwood that they will employ six permanent staff. In addition, there will be temporary and casual employment for busy periods in the gallery, plus employment in the café within the gallery. Based on the revenue generation figures and sales per employee ratios for museums and libraries, we have assumed that the number of casual and temporary staff plus café staff could be another 12 permanent jobs. Together we anticipate that there will be a total addition of 18 jobs within the gallery and its café.

The Stade Improvements - Public Events

Stade Event Management

4.11 The new open space will be adopted by Hastings Borough Council (HBC) and will form part of the larger HBC maintenance contract. New equipment will be required including stalls for markets and a stage for events, and their purchase is included in the capital budget for the project.

4.12 Management of *The Stade* Square is anticipated by HBC to require only one additional job time plus working costs. We estimate the latter by applying an industry standard turnover per employee for management of real estate activity[39]. This gives a total annual revenue budget of £78,400 for running the Stade Event Management (including employment costs).

Stade Maintenance

4.13 The new toilet block will be of similar provision to that being demolished. The working assumption is that the increased maintenance and cleaning responsibility for the square will be balanced by the reduced maintenance cost for the new toilets, generating no additional investment or employment.

Stade Café/Restaurant

4.14 *The Stade* proposals include a (185 sq m) quality café/restaurant, which based on standard employment densities for restaurants has the capacity to support seven jobs. It is expected that the new building will have 50 covers inside with a further 60 on an outside terrace that are likely to be used for part of the year (we assume one full

[38] This uses RPI grossed up 2008 figures based on 2006 Sales per Employee by Sector information from UK PLC, *A Financial Analysis of Corporate Britain*, 2005, Hampton, The Prospect Shop

[39] *Ibid*

season). Public consultation for *The Stade* suggests that there is demand for good quality, affordable dishes with an emphasis on local produce, particularly local fish. The cafe should offer year-round 'quality, casual dining' rather than the emphasis on fast food / fish and chips which is prevalent in the town.

4.15 It is expected that the café will generate a turnover of approximately £300,000 pa, based on the seven jobs multiplied by a turnover per restaurant employee. This is equivalent to £2,760 per cover (or £6,000 if only the inside covers are counted).

Tourist Information Centre

4.16 Included in the café operation will be the provision of visitor information as a satellite operation to the main Tourist Information Centre (TIC) in Hastings town hall. The current TIC at the Stade will be demolished as part of the project.

4.17 The TIC will be a replacement centre and is not expected to incur any additional expenditure to the existing facility. Therefore the net impact is considered to be nil.

Community/Education Facility

4.18 The additional community/education facility will be part of the adjacent East Hastings Sea Angling Association (EHSAA), and is likely to produce community regeneration benefits rather than economic impact, and is not expected to generate any additional call on resources. However, we are informed that capital investment is needed to secure the EHSAA's long term viability, and by enabling improvements to accommodate better community/education facility, this could help secure six jobs at the EHSAA. However, there is no suggestion the EHSAA is in imminent danger of closure and so we ignore this from the economic impact estimate.

Gross Indirect Supply Chain Impact

4.19 Indirect impacts come in the form of local supply chain purchases related to the projects within *The Stade*. This is a first order effect resulting from the gallery and café operators, etc, purchasing goods and services from suppliers. A summary of the estimated indirect supply chain impacts are given in Table 4.2.

Table 4.2 Summary of Indirect Supplier Impact

	Spend	Local Jobs
Jerwood Gallery	£250,000	1.8
Jerwood Gallery Cafe	£35,000	0.3
Stade Square (events management)	£64,373	0.5
Stade Café	£164,692	1.2
Community/education facility	£11,728	0.1
Total	**£525,793**	**3.8**

Source: RTP

Jerwood Gallery

4.20 We are informed by Jerwood that their annual expenditure on goods and services at the Gallery may be around £250,000 pa. They have also commented that the gallery is to benefit the local economy and therefore they will aim to procure locally.

4.21 There will also be a café within the gallery and this may produce an expenditure on goods and services of about £35,000[40].

4.22 Using an average turnover per employee data[41] (unweighted) across a number of goods and service sectors, we estimate that this spend could support two local jobs.

[40] Estimation based on the likely number of covers.

The Stade Improvements - Public Events

4.23 After deducting employee costs (i.e. salaries plus a factor for on-costs) from the revenue spending for public events, the remaining sum is treated as spend on goods and services from managing events at the Stade. This is estimated to sum to £65,000 pa, and would be equivalent to 0.5 of a local job.

Stade Café/Restaurant

4.24 We follow the same approach to estimate local supply chain spend for the café/restaurant. However, we deduct a further 20 percent from the café/restaurant revenue to reflect retained profit because (unlike the Jerwood Gallery and Stade Public events) this operation is to be commercially operated. The forecast spend in operating the café/restaurant is valued at some £165,000, which supports 0.4 of a job.

Community/Education Facility

4.25 Following similar approaches above, we estimate that the community/education facility generates a minor additional local spend of £11,700, making only a small contribution towards a job.

Gross Induced Visitor Spend Impact

4.26 A further impact of *The Stade* relates to spending elsewhere in the local economy by non-resident visitors. This is referred to as induced spending, and for our assumption relates to visitors to the Gallery and public events at Stade Square. A summary is provided in Table 4.3.

Table 4.3 Summary of Indirect Supplier Impact

	Spend	Local Jobs
Jerwood Gallery visitors	£5,190,793	51.3
Stade Square visitors	£2,633,746	26.0
Total	**£7,824,539**	**77.4**

Source: RTP

Jerwood Gallery

4.27 As noted in paragraph 4.8, there are estimated to be some 127,500 non-school age visitors to the Gallery; 79 percent (99,500) of whom are expected to be non-resident visitors.

4.28 The TSE Tourism Economic Impact Model (2006) estimated that the average visitor to Hastings spends £38.13 in the local economy (see paragraph 2.11). However, the actual spend of visitors should be higher if the proposition that cultural tourists spend more, as evidenced in the De La Warr Pavillion (DLWP) EIA[42] study, is correct.

4.29 Survey results taken from a large sample of visitors to the DLWP (some 1,900 responses) found the average spend in Rother district was £34.54, which was twice the average spend (£15) across all types of visitors in the district. It is also noticeable that the DLWP visitor average spend is nearly as high as that identified for all visitors to Hastings, despite DLWP having no entrance charge and Rother having a much smaller service economy in which to capture visitor spend.

4.30 To allow for the higher spend of cultural visitors, we add 50 percent to current visitor spend, which is less than half the differential between DLWP visitors and other visitors

[41] UK PLC (2006), *op cit*

[42] SAM (2006), *op cit*

to Rother district. After grossing up to 2008 prices[43] and deducting the £5 Jerwood Gallery entrance charge (this is already counted in the direct impact), we multiply the average spend by the number of non-resident visitors. This totals £5.2mn in local spend. Using an (unweighted) average sales per employee for sectors most likely to capture the visitor spend (i.e. retail, hospitality and tourism sectors)[44], we estimate 51 local jobs could be supported.

The Stade Improvements - Public Events

4.31 A similar process was carried out for visitors to the Stade for public events. In estimating the number of likely visitors, we use the Business Plan estimates that there should be nine major events/festivals at the Stade each year that are considered likely to attract significant numbers of visitors from outside Hastings. The visitor numbers attending these nine events are expected to total some 180,000 visits (averaging 20,000 per event) within a stable year, following a period of establishing the programme and events over time.

4.32 We assume that 45 percent of these visitors will come from outside Hastings (this is the share achieved by the Hastings Sea Food & Wine Festival[45]), and that 85 percent will be non-school age (same assumption used in the Jerwood Gallery). This estimates that Stade Square attracts nearly 70,000 non-school age visitors from outside Hastings.

4.33 If we multiply the non-resident visitor numbers by the average visitor spend (grossed up to 2008) identified by TSE (2006)[46], then the achieved spend in the local economy is some £2.6mn pa. This supports 26 local jobs.

Gross Multiplier Impact

4.34 Lastly we account for further rounds of spending in the local supply chain that is stimulated by the initial spend from *The Stade* and its visitors. This is termed the multiplier effect. For example, following Jerwood Gallery purchasing of marketing posters from a local printer, the print shop owner uses this revenue to pay for local supplies, some of which will include payment for labour time (wages), which in turn provides an employee with money to purchase a haircut, and so on.

4.35 Many studies have attempted to calculate multiplier levels in local areas, which will vary according to the characteristics of the locality and the depth of its economic base. Stephen Wanhill's[47] study of different multiplier techniques (he reviewed seven studies) found that income multipliers for UK cities and towns ranged between 1.19 to 1.40, with a mean multiplier value of 1.28. A recent impact study on the Hastings to Bexhill Link Road used a local (covering Bexhill and Hastings) multiplier of 1.3.

4.36 Since the Destination Programme's impact is tourism related, we have decided to apply a tourism multiplier used for Hastings by Tourism South East,[48] which is based on the reputable Cambridge Model.[49] This suggests that the local multiplier is some 38 percent. Similarly the De La Warr Pavilion economic impact study, which followed guidance from English Partnerships, uses the same for Rother district. This then

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[43] Using annual Retail Price Index growth.

[44] UK Plc (2006), *op cit*

[45] Hastings BC's survey of visitors to the Sea Food & Wine Festival in 2007.

[46] Tourism South East (2006), *Op cit*,

[47] Stephen Wanhill (1994), *The Measurement of Tourist Income Multipliers*, Tourism Management, 15(4), pp281-283

[48] Tourism South East (2006), *Op cit*, Tables 1.17 and Table 131.

[49] This is a standard computer-based spreadsheet model which uses macro-economic and local information on tourism activities within a given area, including multipliers derived from business surveys (Source: Tourism South East).

seems to be an appropriate multiplier to use in estimating second round spending from businesses and workers supported by *The Stade*.

4.37 On this basis, we estimate the induced multiplier impact is some £3.2mn, and using an (un-weighted) average turnover per employee ratio[50] for all sectors, this supports 23 jobs in Hastings.

Total Gross Impact

4.38 The total gross impact is shown in Table 4.4. In total, *The Stade* generates some £13.4 million in revenue and spend, which supports some 134 jobs.

Table 4.4 Estimated Gross Impact

	Spend	Local Jobs
Direct (programme spend)	£1,909,240	30
Indirect (spend on supplier chain)	£525,793	4
Induced (visitor spend)	£7,824,539	77
Multiplier (second round)	£3,173,126	23
Total Gross Impact	**£13,432,698**	**134**

Source: RTP

Additionality of Impact (net impact)

4.39 In estimating the net economic impact, we comply with the HM Treasury Green Book[51] in identifying the 'additionality' of the project, i.e. the impact that the programme achieves after making allowances for "what would have happened anyway". The Treasury Green Book states that additionality must be calculated with consideration of 'deadweight', 'displacement' and 'leakage' effects. These are explained below.

4.40 In assessing local impact of *The Stade* we need to consider how much of the gross spending and how many of the jobs are additional to Hastings. We estimate this by discounting from the gross estimates (shown in Table 4.4) any deadweight, displacement and leakage from the local economy.

Deadweight

4.41 Deadweight' refers to outcomes which would have occurred without *The Stade* programme. Without *The Stade*, we would assume a continuation of the existing uses on the Stade, including the existing café (Tom's Cabin), TIC and toilet facilities and coach park and lorry on the Stade. All these will be replaced with new facilities. We deal with these in turn:

- The TIC and toilet facilities on the Stade will be replaced with new facilities, which generates no let loss or gain in local resources, and therefore we ignore these.
- The loss of revenue and jobs at the existing café (Tom's Cabin) should be discounted from the revenue, spend and jobs at the new Stade Café/Restaurant. We therefore need to estimate what the gross loss of impact from the existing café will be. According to Valuation Office Agency (VoA) records, Tom's Cabin has a net floorspace of 69 sq m, which based on standard employment densities (13 sq m per job) and turnover per restaurant employee (£42,700), plus assumed local spending on suppliers, we anticipate that the gross displaced loss from the café and further multiplier effects sum to £142,000 pa. This would support nearly three local jobs.

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[50] UK PLC, *Op cit.*

[51] HM Treasury: The Green Book - Appraisal and Evaluation in Central Government, January 2003

- The Stade also provides capacity for up to 42 coaches and lorries on a 24 hour basis that will not be replaced, at least not within this location. The Council are discussing options for relocating the parking bays elsewhere in Hastings so that there will be no let loss of capacity. The Stade will still provide approximately eight coach drop-off and pick-up points to keep footfall in the Stade area. Therefore the only loss is in terms of relocating drivers sitting in their vehicle from the Stade area. This may have some loss of economic impact should the spending by coach and lorry drivers be displaced outside the district (although parking is expected to remain in the district so there will be no loss). Assuming an average spend per visiting driver of £10 per visit (covering the cost of a meal and a few minor consumables such as newspaper, drinks, etc) and assuming that each space is taken everyday, then this spend (plus further multiplier) is £153,000 per year of lost revenue to local businesses. Some, if not all of this spend is expected to remain within Hastings following relocation within the town, so we assume only 50 percent net loss, i.e. £76,500.[52]

Displacement

4.42 'Displacement' measures the extent to which the proportion of revenues/spend and jobs resulting from *The Stade* programme are accounted for by reducing revenue/spend and jobs elsewhere in Hastings. We have identified the following potential areas of displacement within our gross estimate of economic impact:

- Resident entrance fees are included in the direct impact. Because this spending is likely to have been spent in Hastings without the Gallery, we need to discount this.
- Some non-resident visitors to the Gallery would have already been visiting Hastings and spending in the local economy. We have assumed that this accounts for 44 percent of all non-resident visitors to the gallery, which is derived from the Hastings potential visitor survey results (see Appendix 4) findings that 82 percent of potential visitors would be likely/very likely to visit an art gallery in Hastings and 56 percent of these would make a specific trip to do so (this response accounted for 45 percent of all responses). This is lower than the findings from the impact report surveys for the De La Warr Pavillion and Tate St.Ives (see Chapter 3) which found, respectively, 75 and 79 percent of visitors were in the area primarily because of the attraction. The figure may also underestimate the net impact since we have not allowed for additional visitor time spent in Hastings because of the Gallery.
- Some non-resident visitors to the Stade Events would have already been visiting Hastings and spending in the local economy. We have assumed that this accounts for 55 percent of all non-resident visitors to Stade public events based on the same results from a recent survey of visitors to the Hastings Sea Food & Wine Festival.
- The non-resident and net additional number of visitors to Jerwood Gallery that also spend in the Jerwood Café needs to be discounted because this is part of the average visitor spend figure, which potentially results in double-counting. We therefore take out the Jerwood Café revenue and further multiplier impacts from the gross impact.
- Stade Café/Restaurant customers (which will include residents and non gallery/pubic event visitors) spend may result in reduced spending in other Hastings businesses. We already partly allow for this through deducting the full loss of Tom's Cabin in the above deadweight, and we assume a further 50% displacement on the remaining impact of the Stade Café/Restaurant.

[52] There may be a minor welfare loss to drivers and some passengers that will no longer have an option to park and wait in one of Hastings's most prestigious locations on the sea-front, with the views this affords. However, this pales into insignificance when compared with the far greater number of visitors and locals that will benefit from this location and its views once the Stade improvements are complete.

Leakage

4.43 'Leakage' effect is the proportion of outputs that benefit those outside of the target area that the project objectives intend to benefit. To fully understand the impact on Hastings we need to discount any loss of impact through leaks in the economy. We have identified the following potential areas of leakage within our gross estimate of economic impact:

- Not all business spend will be spent within Hastings. The Hastings business survey carried out for this study found that the average local supply chain purchases account for some 54 percent of total business expenditure (excl: labour costs). Therefore, on this basis, 46 percent of the indirect supplier spend related to *The Stade* can be assumed to leave the economy.
- According to the Hastings business survey (see Appendix 4 Business Survey Q13.), local businesses employ 85 percent of their staff from Hastings. Since we are interested in knowing how many jobs are provided in Hastings, we do not consider this now, but look at this later.

Total Net Impact

4.44 The additionality of impact, after discounting for deadweight, displacement and leakage effects above, are shown in Table 4.5. Based on the quantified evidence above and summarised below, we estimate that *The Stade*, in a stable year, will generate some £9.2mn in local revenue, which supports around 112 local jobs.

Table 4.5 Estimated Net (additional) Impact

		Proportion	**Spend (£mn)**	**Jobs**
Gross Impact			**£13.433**	**157**
Deadweight	Tom's Cabin Café closure	100%	-£0.142	-3
	Coach/lorry driver spend	50%	-£0.106	-1
Displacement	Gallery entrance fees paid by Hastings residents	22%	-£0.198	-4
	Gallery non-resident visitors visiting Hastings for other reasons	44%	-£2.767	-29
	Event non-resident visitors visiting Hastings for other reasons	27%	-£0.443	-4
	Jerwood Café customer spend	100%	-£0.124	-1
	Stade Café/Restaurant customer spend	50%	-£0.138	-1
Leakage	Business spend outside Hastings	46%	-£0.334	-2
Net Additional Impact			**£9.181**	**112**

Source: RTP

Local Gross Value Added (GVA)

4.45 To estimate the real added value to the economy from these net impacts, we estimate local GVA and the number of local jobs filled by Hastings's residents. These are summarised in Loosely speaking, GVA reflects profits, salaries and investment in an area, and is the net value of revenue after allowing for supply inputs. Based on the 2006 UK Blue Book accounts, each service sector job generates some £33,300 in gross value added (GVA) output per year nationally. After grossing up to 2008 values, in today's values we forecast that *The Stade* will increase Hastings's GVA value by a further £3.2mn per year.

4.46 According to the Hastings business survey (see Appendix 4 Business Survey Q13.), local businesses employ 85 percent of their staff from Hastings. On this basis, if *The Stade* supports 112 additional jobs, then we would expect that 95 of these jobs to be filled by local residents. Given the levels of local deprivation, as identified in Chapter 2, we would expect that the high take-up of these jobs by Hasting's residents is particularly important.

4.47 Table 4.6

4.48 Loosely speaking, GVA reflects profits, salaries and investment in an area, and is the net value of revenue after allowing for supply inputs. Based on the 2006 UK Blue Book accounts, each service sector job generates some £33,300 in gross value added (GVA) output per year nationally. After grossing up to 2008 values[53], in today's values we forecast that *The Stade* will increase Hastings's GVA value by a further £3.2mn per year.

4.49 According to the Hastings business survey (see Appendix 4 Business Survey Q13.), local businesses employ 85 percent of their staff from Hastings. On this basis, if *The Stade* supports 112 additional jobs, then we would expect that 95 of these jobs to be filled by local residents. Given the levels of local deprivation, as identified in Chapter 2, we would expect that the high take-up of these jobs by Hasting's residents is particularly important.

Table 4.6 Summary Economic Impact for Hastings

	Revenue (£mn)	**Local Jobs**
Gross Impact	£13.4	157
Net Additional Impact	£9.2	112
GVA	£3.2	
Hastings's Residents in Jobs		**95**

Source: RTP

Catalytic Impacts

4.50 It was noted in Chapter 3 that cultural activities and improvements in public realm can have longer term immeasurable impacts, which are sometimes known as catalytic impacts. This refers to the rise in economic development and productivity and is reflected by increases in property prices (i.e. value of a place) in the location of the cultural asset.

4.51 It is not possible to directly estimate what the catalytic impact associated with *The Stade* programme will be. But to give an indication we rely on the evidence from the ECOTEC[54] study for CABE (see Chapter 3) which found that good quality natural environment can increase property prices by a 15 percent. Although *The Stade* programme is not a natural environment in the conventional sense, its aim is to make better use of Hastings's natural assets by generating high quality building design, an attractive streetscape setting and improved cultural offer on the seafront.

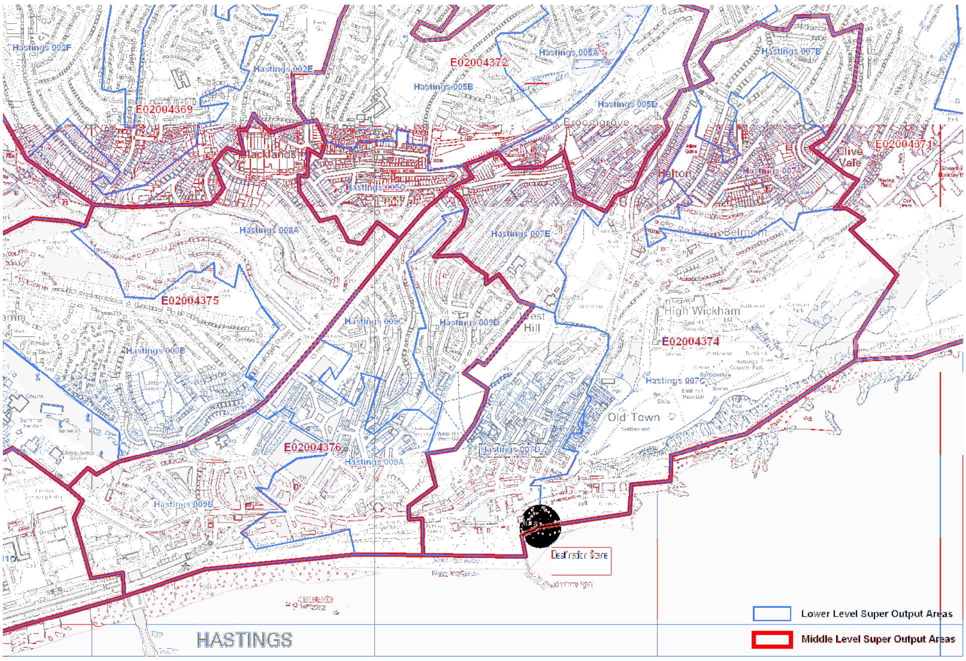
4.52 As a way of gauging the impact of this catalytic uplift proposition, we estimate the change in local retail rental prices and the increases in Exchequer returns (in the form of business rates) from raising the rateable values of all commercial buildings in the super output area (SOA) covering the Stade[55] (shown by E02004347 in the map below).

[53] We use a 2.5 percent annual growth rate over two years.

[54]ECOTEC (2007) *Economic Impact of Public Realm*, for East Midlands Development Agency

[55] SOA is the smallest statistical area for deriving floorspace stock figures. Although this SOA includes parts of Hastings some distance from the Stade, a google earth search shows that nearly all the commercial space in this area is located in the old town area very close to the Stade.

Figure 4.1 Super Output Area Covering and Surrounding *The Stade*



Source: RTP

4.53 In-town retail rents for Hastings in 2007 averaged £1,184 per sq m.[56] Multiplying this by the stock of retail floorspace[57] in the SOA for the area surrounding the Stade, we estimate that the current retail property rental value is some £16,576mn pa. A 15 percent increase would therefore generate an additional £2.49mn in annual rents. This is equivalent to an average rental investment of £6,900 per retail businesses within the local area.

4.54 Another way of estimating catalytic impact are through the uplift in Exchequer values. As shown in Table 4.7, in 2007 the rateable value for all commercial space (including offices, industrial and retail) within this SOA was £1.551mn per year. With 15 percent uplift, an additional £232,650 pa could be collected through business rates as a result of *The Stade*.

[56] Colliers International (2007), *In Town Retail Market Reports*

[57] CLG (2008), *Commercial and Industrial Floorspace Statistics 2007*

Table 4.7 Improved Rateable Value of Property from Catalytic Impact

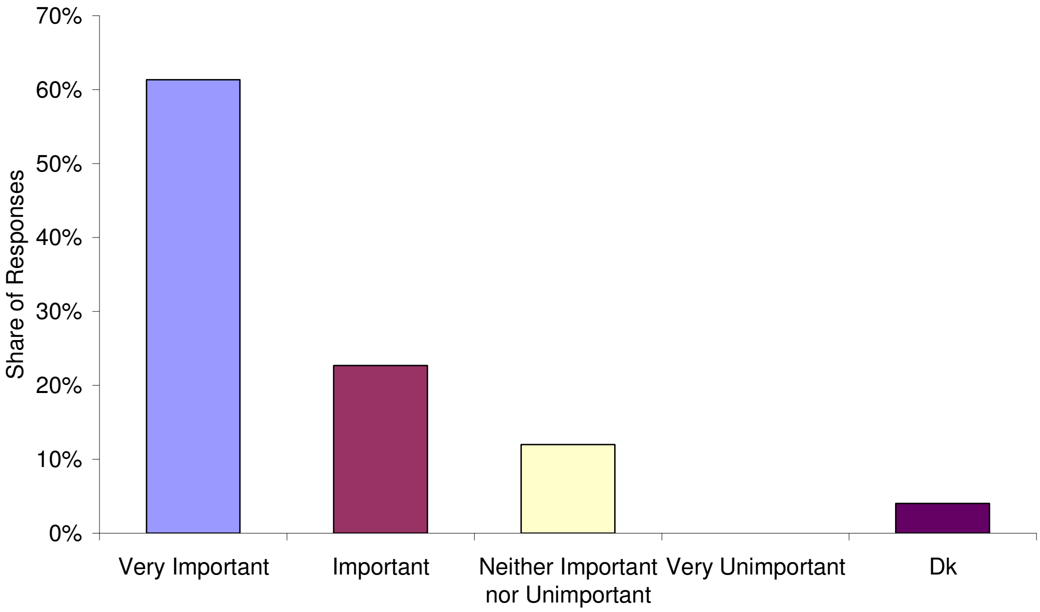
	Current - April, 2007 (£)	With 15 percent increase	Net Change
Retail Premises	£1,133,000	£1,302,950	£169,950
Offices	£90,000	£103,500	£13,500
Factories	£124,000	£142,600	£18,600
Warehouses	£96,000	£110,400	£14,400
Other Bulk Premises	£108,000	£124,200	£16,200
Total	£1,551,000	£1,783,650	£232,650

Source: RTP; CLG[58]; Ecotec[59]

Perception of Local Businesses

4.55 The business survey received responses from a range of businesses (see Appendix 4) located in Hastings Old Town and Town Centre. Of the 75 business responses, some 61 percent felt that tourism facilities (like the Jerwood Art Gallery) are very important to their business (see Figure 4.2).

Figure 4.2 Business Survey Responses to the Perceived Impact of Tourism Facilities on their Business



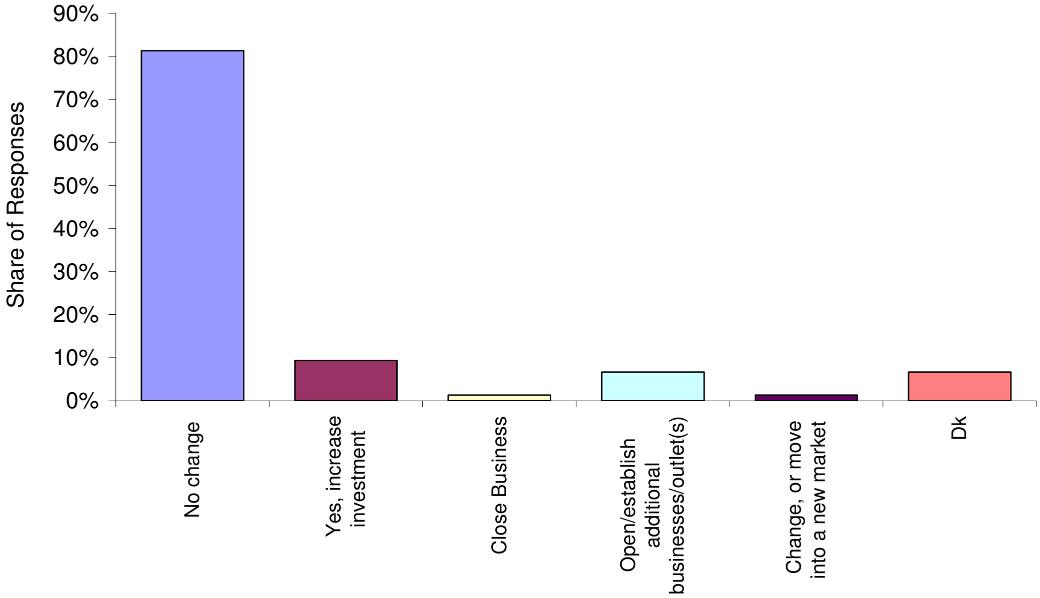
Source: RTP Hastings Business Survey

4.56 This anticipated growth in investment is supported by the findings from the Hastings Business Survey (see Figure 4.3) found that nine percent of all businesses surveyed would be prepared to increase investment in their business as a result of *The Stade*. Eight percent of businesses said that would open/establish an additional business or change/move into a new market. One pub business that we spoke with stated that "the Jerwood art gallery will change the way we run this business. In particular, we will offer different and more up-market food options".

[58] CLG (2008), *op cit*

[59] Ecotec (2001), *op cit*

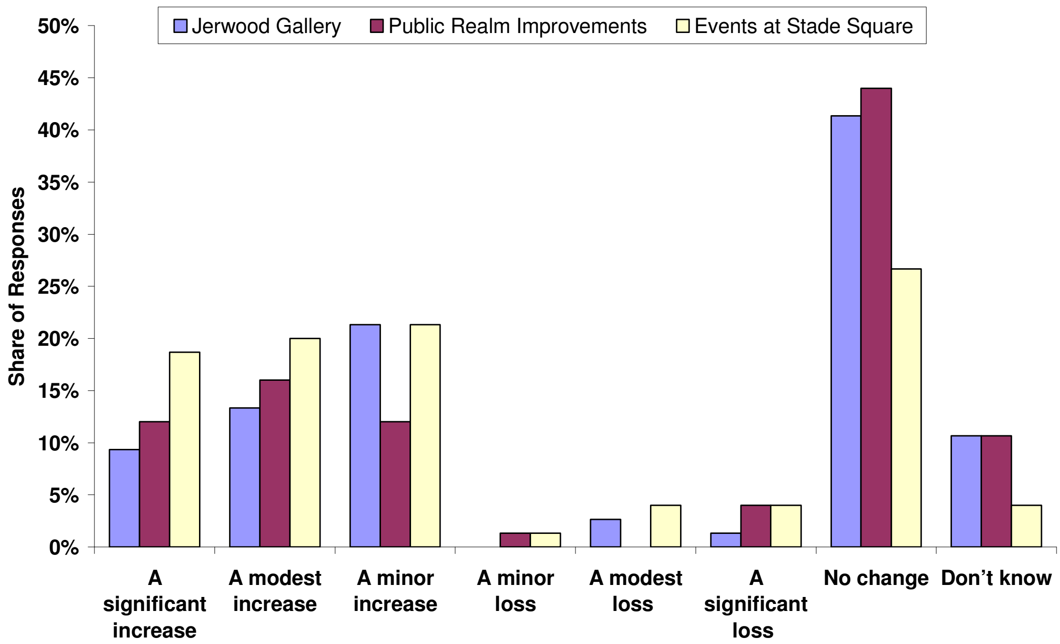
Figure 4.3 Business Survey Responses to the Perceived Impact of *The Stade* on their Business



Source: RTP Hastings Business Survey

4.57 The same proportion of businesses felt that the Jerwood Gallery would significantly increase their business trade, and as shown in Figure 4.4, improved public realm and events at the Stade were perceived to have an even more significant impact.

Figure 4.4 Local Business Perception of *The Stade* Impact on their Business



Source: RTP Hastings Business Survey

Perception of Local Stakeholders

4.58 Discussions with a number of local investors and commercial agents, inward investment and local business organisations all perceived that *The Stade* will have a positive potential for catalytic impacts. Generally it was felt that investors have been bypassing Hastings because of its poor image, low education levels and low cultural offerings (with the exception to the 1066 branding). Consequently, Hastings has not been a major investment market or a place of choice for higher skilled workers and higher spending visitors. Also the reliance on seasonal tourism was a problem, which has reduced the sustainability of local businesses.

4.59 It was also acknowledge that Hastings does offer good opportunities for cheap property, and this is said to have attracted many lifestyle businesses that are now located here. The disadvantage of these businesses is that they are not growing and therefore they are not able to sustain high levels of much needed employment.

4.60 All the consultees felt that there was potential within Hastings to improve the overall appearance and value of the area, and that a new Jerwood Gallery and Stade improvements could be a strong catalyst. The media attention that *The Stade* would attract was considered to be particularly important on changing the image of Hastings among potential investors.

4.61 The perception of one local independent business adviser was particularly strong in the following extract on the catalytic value expected from *The Stade*:

"The opportunity to make a sustainable living wholly or substantially within the town for local arts practitioners does not exist due to the current visitor profile and lack of cultural tourism - an issue that the Jerwood proposal would go a long way to rectifying… placing of a nationally recognised cultural attraction that would bring visitors to Hastings throughout the year would bring a huge positive impact on the long-term sustainability of these businesses and assist in retaining the unique character of Old Town. As can be seen from the much smaller redevelopment of the Marina Pavilion in St Leonards recently, local existing businesses have refurbished and reinvested into their enterprises, while many new businesses have and continue to be attracted into the surrounding area."

4.62 This quote neatly summarises the general views held by the various business interest groups and stakeholders that we spoke to through this study.

Development Momentum

4.63 A significant amount of funding has been pumped into Hastings to support future growth and regeneration. Much has come through the joined up approach set out in achieving the Five Point Plan (see chapter 3) for regenerating the area, which has acted as a catalyst for attracting public funding including Government support of £38m and a SEEDA contribution of £30m, £112m from the Learning and Skills Council, £7m from HEFCE/University of Brighton, £9m from ERDF, £15.1m from English Partnerships and £9m from Network Rail, £21.7m from the local authorities and £21m from the Primary Care Trust. East Sussex County Council is leading on the delivery of the £89m Hastings & Bexhill Link Road.

4.64 This funding is starting to lever in private sector investment, for example, the recent completion of the Creative Media Centre, which is a 14,000 sq ft prestigious managed business space for local media start-ups, which with 38 tenants has become a hub for business support and development. Other recent developments include University Centre Hastings, with expansion plans for 2,000 additional students, Laguna Place commercial development, Priory Meadows retail centre, and along the seafront with Marina Pavilion entertainment and conference facility. Consequently development momentum has been growing.

4.65 But the existing development schemes are focussed on physical and social aspects of place-making but with little cultural impact. It is therefore important that *The Stade* supports this growth in activity, and the expectation of stakeholders is that its real added value is not in the direct/indirect jobs and investment, but through delivering cultural change (which we cover further in detail in the next chapter). It is the cultural improvement, where most stakeholders feel that *The Stade* will add real (catalytic) value.

4.66 As we saw in Chapter 3, cultural offerings will help raise an area's profile and improve its image to investors, businesses, workers and residents. Therefore *The Stade* is seen to be important by complementing and building on the existing development momentum that is already happening through physical and community regeneration.

Conclusions

Measurable Economic Impact

4.67 The forecast direct impact of *The Stade* is nearly £2mn in annual revenue that will support some 30 local jobs. In addition, there is an indirect impact of £11.5mn in revenue from supply purchases, the spending generated by visitors to *The Stade* and further multiplier effects, which indirectly supports 104 jobs.

4.68 After allowing for deadweight, displacement and leakage, in a stable year the additionality offered by *The Stade* programme to the Hastings economy is forecast to be some £9.5mn in revenue, supporting an additional 112 local jobs with 95 filled by Hastings residents and adding some £3.2mn in gross value added to the Hastings economy.

Catalytic Impacts

4.69 It is widely acknowledged among local investors and stakeholders that there will be positive catalytic impacts from *The Stade*. This supports the evidence reported in the previous chapter.

4.70 The capacity within existing businesses to capture benefits from the programme is strong, with some local businesses perceiving the impact on them to be significant. While it is not possible to fully estimate the impact of catalytic changes, based on evidence from elsewhere we have provided an indicative estimate of £2.5mn being added to the value of retail premises in the area surrounding the Stade, plus £232,000 in increased tax receipts from all commercial businesses surrounding the Stade,

4.71 The expectation among stakeholders is that *The Stade* will add most value and catalytic benefits by improving Hastings's cultural offer, which in turn will complement the existing development momentum. We look more closely at its cultural impacts next.

5 CULTURAL IMPACT OF *THE STADE*

Introduction

5.1 This section of the Impact report considers the cultural impact that will be generated by *The Stade*. The section reviews the current cultural provision and activity. It then sets out the cultural activity that is planned to take place around the new facilities and the cultural impacts.

5.2 Culture is defined by the Department for Media, Culture and Sport as including sports and recreation, countryside activities, parks and open spaces, museums, libraries, archives, theatre, arts and crafts, music, historic buildings and landscapes. Although this definition is useful for recognising the broader components of culture, we have focussed on the aspects related to *The Stade*, which are visual arts and performance. Tourism and recreation as an activity are included within the Economic Impact sections of this report although some of the facilities dependent on tourism and recreation are considered in this section.

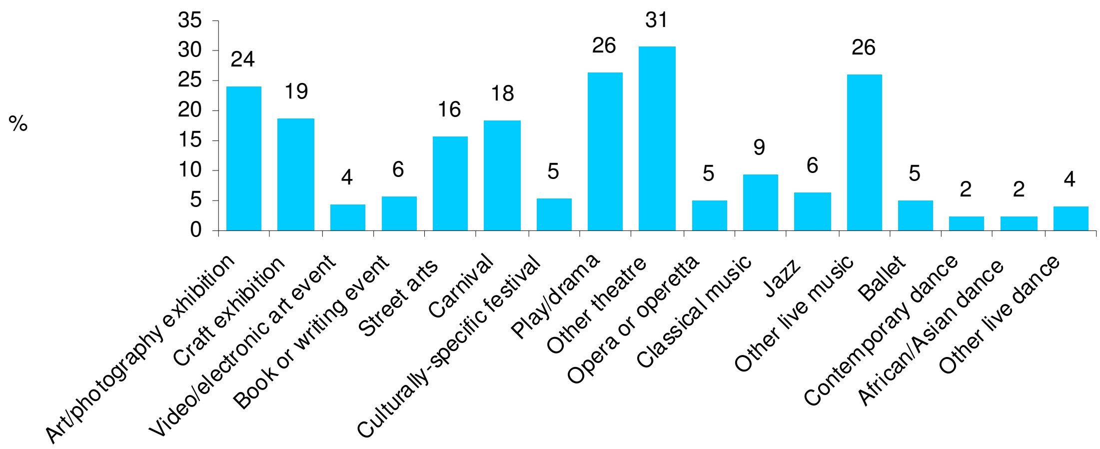
5.3 The cultural impact assessment of *The Stade* is a qualitative analysis, informed by consultation with arts and cultural stakeholders and guided by the plans for the capital build and revenue projects and events.

Cultural Participation

5.4 In the South East, 73 percent of adults attended an arts event and 58 percent participated in an arts activity at least once over the previous 12 months. 48 percent of adults both attended and participated and 17 percent did neither. Compared to the national average, the South East arts attendance and participation is higher.

5.5 The events that were most attended were theatrical, music and arts/photography exhibitions, as shown in Figure 5.1.

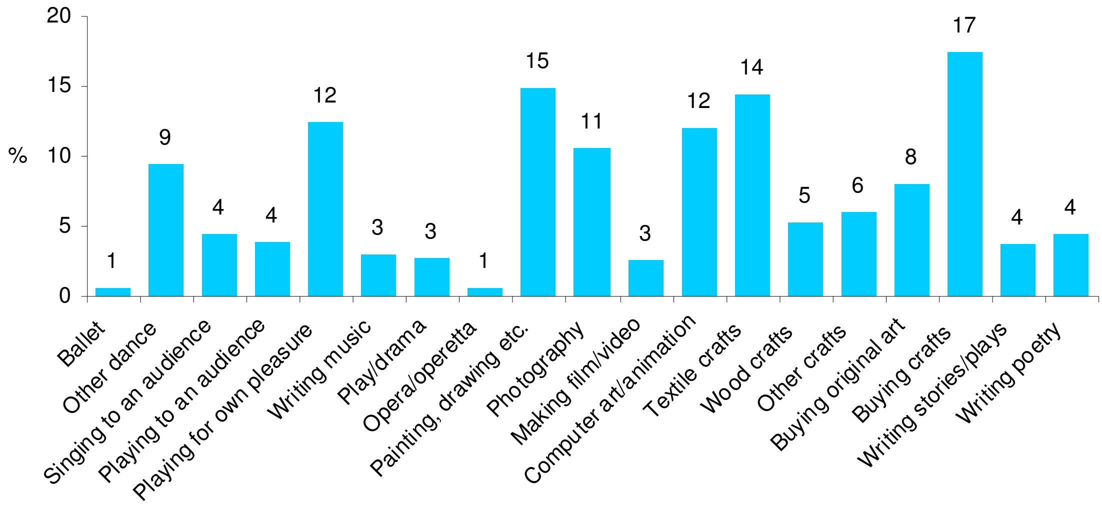
Figure 5.1 Arts Attendance in the South East, by type of event



Source: Informing Change, 2007, Arts Council England

5.6 The events with the most participation were craft, painting, computer art and playing an instrument, which are shown in Figure 5.2

Figure 5.2 Arts Participation in the South East, by type of activity



Source: Informing Change, 2007, Arts Council England

5.7 No comparable data is available for arts attendance or participation in Hastings.

Hastings Culture

5.8 The Cultural Strategy[60] sets out some of the background to Hastings and provides an insight into the events and people who have contributed to the culture of the town:

"The town has a rich history and has constantly re-invented itself. Famously associated with the Battle of Hastings and the Norman Conquest, its history is bound up with the sea. It prospered as a Norman port in the eleventh and twelfth centuries and formed part of the Cinque Ports, an alliance of Kent and Sussex ports to defend the area against the French. Regenerated itself in the sixteenth century as a major ship builder supplying ships to fight the Armada re-invented itself again in the early nineteenth century as a Victorian seaside resort and today retains Europe's largest beach-based fishing fleet. The town has always striven for equality, welcomed innovation and used its creativity as a way to bring about change - even when that has been controversial. Hastings had, for example, particularly active suffragettes, who used carefully crafted posters to encourage women to register for the vote. It boasts several famous 'adopted' notable figures including John Logie Baird inventor of the television, who conducted early experiments in the town; Grey Owl, the world's first environmentalist; the socialist author Robert Tressell; Catherine Cookson who lived in the town for many years and Dr Elizabeth Blackwell, Britain's first woman doctor."

5.9 To this list can be added figures such as the controversial Chapman Brothers, who went to school in Hastings before going on to become part of the Young British Artists movement, as well as the annual 40,000 language students staying in the town each year, bringing a cosmopolitan influence.

5.10 Part of the culture is reflected by the festivals in Hastings, such as Jack in the Green, Coastal Currents, Walk the Fish, Seafood & Wine and Shot by the Beach.

5.11 Discussion elsewhere in this document has detailed the particular problems facing Hastings in terms of deprivation, low productivity sectors and slower than average economic growth. This is linked to relatively poor educational attainment rates and

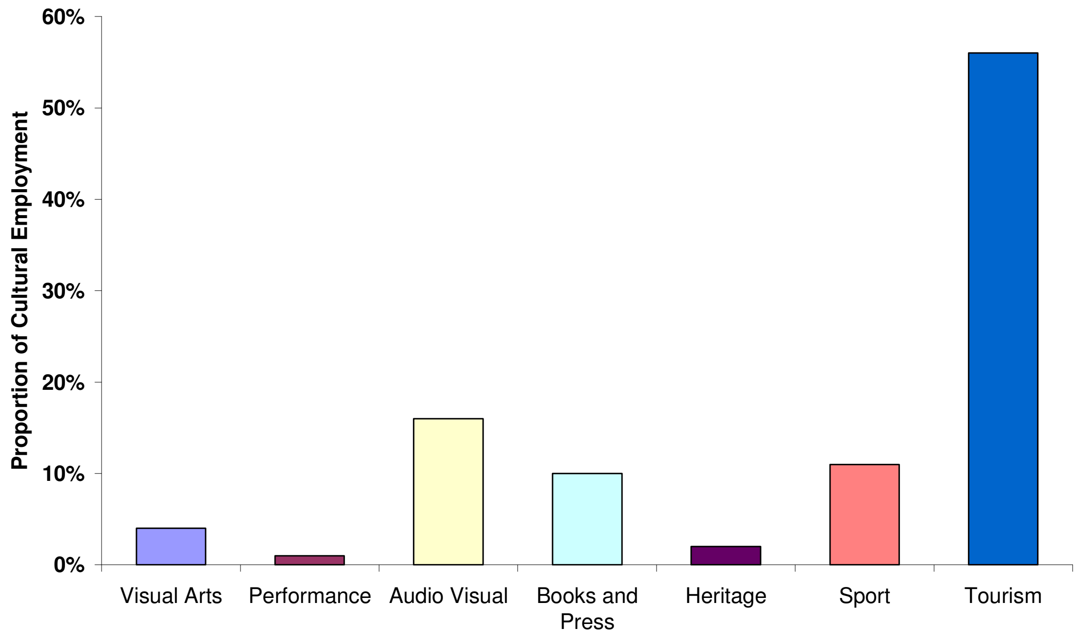
[60] Hastings and St Leonards Cultural Strategy: A town that's good to live in, 2002, Hastings Borough Council

high unemployment[61]. These problems have come about as the town slowly restructures its economy away from a reliance on traditional UK main holiday visitors towards a more diverse visitor offer and a broader economic base. Despite the problems faced by Hastings, the town has a very good natural and built environment, with relatively affordable housing, providing a set of opportunities which have attracted lifestyle businesses, including artists and others in the creative sector.

The Cultural and Creative Sector in Hastings

5.12 The wider cultural sector[62] in Hastings and Bexhill employed 6,800 people in 2004; a 25 percent growth since 1999. There were 1,495 cultural workplaces (see Figure 5.3), a 9 percent growth since 1999. Tourism is the largest component by some margin, followed by audio visual, sport and books and press.

Figure 5.3 Hastings and Rother Cultural Sector Employment by Sub-sector 2004



Source: ABI 2004, NOMIS, as reported in Hastings and Bexhill Cultural Mapping, 2006, Hastings and Bexhill Cultural Sector Group

5.13 Within the wider cultural industry, there has been growth in the sub-sectors concerned with distribution and consumption (e.g. venues etc.) and those concerned with production and reproduction (e.g. publishing). However, there has been little growth in the sub-sectors concerned with content origination[63].

5.14 While these figures provide a useful reference point, the method of collecting them (the Annual Business Inquiry) does not handle all of the cultural sector components well. For example it uses a sampling basis for companies with fewer than 50 employees, the Standard Industrial Classifications used do not adequately capture design or craft, and the ABI does not capture self-employed people - and the cultural sector is likely to have a strong proportion of self-employed workers[64].

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[61] Detailed in a number of documents e.g. Making Waves, a Regeneration Strategy for Hastings and Bexhill, 2002, Hastings Regeneration Partnership

[62] As defined by DCMS – visual arts, performance, audio visual, books and press, heritage, sport and tourism

[63] Hastings and Bexhill Cultural Mapping, 2006, Hastings and Bexhill Cultural Sector Group

[64] Labour Force Survey as noted in the Hastings and Bexhill Cultural Mapping, 2006, Hastings and Bexhill Cultural Sector Group

Cultural Priorities

5.15 The Arts Council agenda[65] has six priorities:

- Taking part in the arts – encouraging more people to take part in the arts; increasing attendance by 3 percent and participation by 2 percent by black and minority ethnic (BME), disabled and economically disadvantaged groups
- Children and young people – using arts to reduce youth offending and create pathways to education, training and employment through creativity; and continue the benefits of the Creative Partnerships programme
- The creative economy – supporting professional development for artists, access to business support and finance; and develop the business and leadership skills of leading ethnic figures
- Vibrant communities – embed culture into the development of sustainable communities; and cultural provision in places experiencing housing-led growth that have been poorly served
- Internationalism – reinforcing England's cultural world leader role, supporting Capital of Culture programme, London 2012
- Celebrating diversity – disability and BME equality and arts take up and employment

5.16 Many of the priorities for the development of culture in Hastings relate to the opportunities to tackle the problems summarised earlier in this section, rather than a systematic 'lack of culture' in the town. The Arts Development Strategy and Action Plan for Hastings[66] states that artists and arts organisations have demonstrated their capacity to help improve the quality of the town's environment, to contribute to the healthy living of its population and to support economic development and community safety work. The eight Priority Themes 2005-2010 are:

- **Young people** – reflecting Hastings' relatively young population and the importance of increasing opportunities for young people to participate in the cultural life of the town
- **Education, art and professional development** – supporting long-term development and capacity building in the local arts sector through facilitating opportunities for artists to engage in education, training & professional development. This addresses the 'wastage' of talented individuals who leave the cultural sector because of the difficulties of access to markets
- **Public art** – playing a central role in ensuring distinctive and high quality local environments and public spaces
- **Infrastructure** – improving the quality, availability and long-term sustainability of spaces for making and showing work in Hastings
- **Festivals and programming** – using arts festivals and community-focussed events to continue re-image the town and develop the local cultural economy
- **Arts and health** – using the arts to improve people's quality of life and to support healthy living objectives
- **Marketing & advocacy** – supporting the local and regional profile of the arts in Hastings
- **Internal systems** – improving the service to the local arts community

[65] Our Agenda for the Arts 2006-8, 2006, Arts Council England

[66] Hastings Borough Council 2005

5.17 The separate strategy for developing public art in Hastings[67] has the following objectives:

- Advocate for the role of public art
- Implement public art as part of regeneration initiatives
- Partnership working
- Inclusion of public art in development schemes, including Percent for art
- Guidance for public art commissions
- Public art tendering opportunities for local artists

Current Provision

5.18 The main cultural facilities in Hastings include three key museums – Fishermen's Museum, Hastings Museum & Art Gallery and the Hastings Old Town Hall Museum – as well as two quite different theatres and a set of commercial visitor attractions, including the Flamingo Family Park on the Stade[68]. The built and natural environment is part of the cultural provision in Hastings, particularly Pelham Beach and the Stade as well as the wider urban fabric in the Old Town and elsewhere in Hastings and St Leonards. The mix of cultural provision reflects the broad range of users living in Hastings and visiting from elsewhere.

5.19 St Marys in the Castle was operating as an arts centre but is now operated by a faith group, with little artistic programming.

5.20 The De La Warr Pavilion in Bexhill, five miles to the east, is a modernist gallery for architecture and contemporary art. Following a renovation in 2005, the Pavilion has:

- One of the largest contemporary art galleries in South East England
- An auditorium seating up to 1,000 people
- A large, new studio space
- Roof and ground floor terraces, including a bandstand
- A café, bar and restaurant with outdoor terraces
- A shop specialising in books and merchandise on arts and culture
- Indoor and outdoor spaces

5.21 The Pavilion hosts a series of exhibitions as well as educational activities.

5.22 In addition to the cultural provision listed above, Hastings has a series of private and community based cultural facilities. These include:

- The exhibition spaces managed by Hastings Arts Forum in St Leonards
- F-ish, which is working with Sea Space to use redundant buildings as exhibition spaces
- I-Candy
- The Old Gallery
- Black Lark Gallery
- The Leigh Gallery

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[67] Pride of Place - Public Art in Hastings, 2005, Hastings Borough Council

[68] Further detail can be found in the appendix to this document

5.23 As well as providing facilities for residents and visitors, these galleries also provide one of the routes to market for the artists exhibiting their work.

Current Activity

5.24 The main cultural activities in Hastings include four important annual festivals – the Seafood and Wine Festival, which takes place on the Stade, the Coastal Currents Arts Festival (which includes theatre, street arts, live arts performances and the Open Studios programme) Jack in the Green and the Hastings Bonfire Procession and Fireworks. Around these four festivals are a variety of other cultural events[69].

Baseline

5.25 There is currently no established participation and attendance baseline for cultural activity in Hastings. It is recommended that research work is undertaken to establish levels of arts participation and attendance amongst residents and visitors before *The Stade* is developed in order to establish a baseline. This should identify the attendance and participation rates amongst groups identified as a priority - BME, disabled and economically disadvantaged groups, children and young people – as well as overall rates. This work should be repeated after opening and from time to time.

5.26 It is recommended that any such work should be undertaken in partnership with other cultural providers in Hastings and Bexhill, and the information used for mutual benefit as well as providing monitoring for *The Stade*.

The Stade

5.27 The cultural impact of *The Stade* will stem from the development of the project, people attending the high quality visual arts provision and other arts events, and participating in arts events. There will also be cultural impacts relating to the fishing community.

Project Development

5.28 The development of the project will be guided by a lead artist on the design team, to be commissioned in partnership with the Jerwood Foundation. This is to ensure that art is *embedded within* the project as well as *accommodated by* the project. The lead artist will be part of the consultation with the community to ensure that there is a creative approach to the development of the capital project. The project development will also see the start of a rolling programme of artist curators/animateurs for cultural projects and events on *The Stade*, supported by a design phase awareness budget and an arts commissioning budget [70].

5.29 The impact of this aspect of the project is to infuse the energy of the project development with art and creativity, and allow the wider community an active role within this process. This will build local ownership and engagement with the gallery and other aspects of the project and is likely to increase participation in the permanent and temporary exhibitions and events. The process should also enhance the physical design and creatively encourage access by all user groups.

5.30 This process meets the Arts Council and Borough Council strategic objectives relating to participation, children and young people, and vibrant communities.

[69] Further detail can be found in the appendix to this document

[70] This may take the form of projects such as the Folkestone Triennial, which featured 22 public works by major artists in 2008, subject to funding support

The Jerwood Gallery

5.31 The Jerwood Gallery will contain the Jerwood collection as well as a temporary exhibition gallery that will exhibit the Jerwood Visual Arts Programme as well as other exhibitions.

Jerwood Collection

5.32 The collection presents a spread of 20th and 21st century British fine art and is continually expanding. It is a collection with a unique personality rather than a 'definitive survey' of British art and this is part of its appeal. It ranges from well-known names such as Augustus John, David Bomberg, Stanley Spencer, LS Lowry, Terry Frost, Prunella Clough and Maggi Hambling to artists that may not be familiar names to a general audience but are recognised as important figures from these periods. It is particularly strong on St Ives group artists from the 1950s but has a wealth of interesting and unusual pieces from many artists, and includes several outstanding works by former winners of the Jerwood Painting Prize. It is certainly one of the most significant collections of its kind that is not currently on show to the public in this country.

5.33 In some ways the collection sits between the collections of Kettles Yard in Cambridge, Pallant House in Chichester and Tate St Ives in that it has the quirkiness, individuality and unexpected delights of Kettles' Yard, the historical spread of Pallant House (but not so definitive and without the concentration of 1960s pop art) and the strengths in Newlyn School and St Ives group artists who are of course so well-represented at the Tate there. There is also the benefit of an active purchasing policy which seeks to both fill some of the gaps in the 20th century collection and expand the range of more recent and contemporary works. The building seeks to create a setting for the collection that allows its particular character to sing out rather than a bland 'textbook' approach to defining British art. In this way the Foundation hopes to create a gallery that feels as unique and original as the collection itself and which will itself be part of the attraction. The sculpture courtyard may display a rotating selection of works from the Jerwood Sculpture Collection (housed at Ragley in Warwickshire) which includes pieces from many significant sculptors including Anthony Gormley, Elizabeth Frink, Michael Ayrton and Peter Randall Page, special commissions or temporary installations.

5.34 The collection represents an extremely high quality range of art that is not currently available in Hastings and the gallery will be an opportunity to see many works of art that are unusual and/or important pieces. It will provide access to a good comprehensive survey of the modern British artists and will be of specific interest to cultural tourists, art students and academic audiences. The combination of the setting and the collection will be an important part of the experience. Works from the collection are frequently requested as loans to other galleries.

5.35 The Jerwood Foundation has indicated that it would make the education space within the Gallery available to other groups who wished to run activities based there or using the gallery as a resource. These might range from talks and Q&A sessions with artists, to life drawing classes, children's workshops, student seminars, etc. It will be equipped with AV and projection equipment and also designed for messy uses[71]. Information packs for schools will also be produced and pre-booked schools visits welcomed. Depending on demand there may be the opportunity to designate one morning or afternoon a week specifically for young children and to close the gallery to other visitors.

5.36 Part of the cultural impact from the Jerwood collection will be the engagement with high quality art by residents and visitors. The permanence of the exhibition will allow residents the opportunity for repeated appreciation of works and the chance to gain an

[71] A larger creative space will be provided as part of the community/education facility also forming part of this project. This will ensure that larger groups – such as whole classes – can be accommodated

understanding of what they represent. This can provide reference points for critical assessment of other cultural activity. The significance of the Jerwood permanent collection will be a key factor[72]. The emphasis on education will have an impact on the children visiting the gallery as part of group visits. Overall it is anticipated that visual arts attendance will rise as part of the impact of the permanent collection.

5.37 The cultural impact will also be an enhancement of community pride and a contemporary sense of identity to complement 1066. This will include the fishing fleet and its working beach that will accommodate the new project as well as the wider population of Hastings and St Leonards.

5.38 The display of the nationally important permanent collect will further the Arts Council objective of reinforcing England's role as a cultural world leader, supporting London 2012. It will also further the Borough Council's objective of new arts infrastructure and supporting the local and regional profile of the arts in Hastings.

Temporary Exhibitions

5.39 The Jerwood Visual Arts Programme shows mostly feature work by emerging and younger artists as well as some work by more established names on the contemporary art scene. The emphasis on quality means that many of the artists featured are 'rising stars' and the Jerwood prizes in the visual arts, which make up a large proportion of the Jerwood Visual Arts Programme, are seen as a place to spot potential stars of the future across art forms. They are consistently well-attended by an extremely wide range of audiences and particularly by young and emerging artists, students and art collectors and dealers. They also show work by some more established artists with whom Jerwood has a relationship, e.g. a recent exhibition showed work by Anthony Gormley alongside works by lesser-known emerging artists.

5.40 As the Jerwood Visual Arts Programme focuses mostly on showcasing the best emerging talent from across the country, the shows tend to have a good 'buzz' about them and are well-reviewed. Some are quite experimental, for example a new programme is looking at digital and media arts such as animation and video. The Jerwood Visual Arts Programme shows span a full range of art forms from photography, painting and drawing to applied arts (e.g. ceramics, jewellery, glass) and sculpture as well as the new moving image award scheme.

5.41 The Jerwood Gallery will also show four to six temporary exhibitions a year, each involving at least 10 artists, with the programme to be developed in due course. This is likely to contain high quality work by Hastings artists.

5.42 The Jerwood Foundation views the arts as within a wide definition of education and particularly focuses on supporting young artists at the formative stages of their careers through their grant-giving. Jerwood does not currently run a facility similar to the proposed gallery so there can be no exact parallel made between what is currently programmed and what may be run at the new gallery. Nevertheless, at the Jerwood Space all the exhibitions are accompanied by a full programme of talks, debates, etc aimed at both general and more specialist audiences (most exhibitions have at least three and up to seven or so evening/lunchtime talks), and school and student groups are welcomed. A similar set of activities is intended for the gallery on the Stade.

5.43 The cultural impact of the Jerwood Visual Arts programme and other contemporary exhibitions will be the challenge of some of the work and the opportunity to see the early careers of future established artists. The changing exhibitions will bring renewed interest and perpetuate the cultural impact. Overall it is anticipated that visual arts attendance will rise as part of the impact of the temporary exhibitions.

[72] Experience at the De La Warr Pavilion has shown how people will build up trust with the gallery and its contents over time – the proportion of total visitors who visited the gallery grew from around 25% in 2005 to 45% in 2007

5.44 It is likely that ready access to the permanent and temporary exhibitions in the Jerwood Gallery will provide further impetus to the development of careers in the creative sector in Hastings. Part of the cultural impact will be the role *The Stade* may play as a focus for networking amongst the creative sector and through raising the profile of the arts community in the town.

5.45 Part of the impact of events and exhibitions in the Gallery will be to raise the profile of the South Coast as an arts destination.

Other Jerwood Impacts

5.46 The involvement of the Jerwood Foundation presents the opportunity to lever in the involvement of other arts organisations and programmes, as a result of the Foundations established reputation. This will bring benefits such as:

- The opportunity to lever in advice and other assistance to artists in Hastings from arts networks and high profile artists. This might include Jerwood partners such as Artangel. Jerwood's role could include acting as a broker to ensure quality and assist with arts funding
- A higher local profile for the open call for entry Jerwood prizes, with the local presence raising awareness and enthusiasm within Hastings artists
- The increased potential to have Jerwood Foundation revenue funding for Hastings arts projects, complementing the operation of the gallery
- Arts advice to Hastings Borough Council, e.g. assisting with effective artist commissioning

Events

5.47 Initial planning for a programme of events on the square and in the community/education facility includes a wide range of cultural participation events. There is a commitment by Hastings Borough Council to deliver a programme of events with partners, and new funding has been committed to underpin this programme. The key aspects of this programme are:

- A variety of new cultural events and programme projects have been proposed, capitalising on the opportunities offered by the development of the Jerwood Gallery, the square and the community/education facility. These include festivals, theatre and installations. Part of *The Stade* is a commissioned art project, proposing to include the Jerwood Gallery in the development of new artworks. The cultural events also include a major street arts project. The new cultural projects are the result of long term dialogue between cultural organisations in Hastings and Hastings Borough Council
- Many of projects proposed are community-based cultural events. These included a set of festivals celebrating the role of different parts of the community, representing additional activity around traditional festivals and newer events. The projects seek to use *The Stade* as an opportunity to enhance or extend existing work rather than displace it from elsewhere in the town. These projects involve younger people, people with disabilities and older people. The larger of these projects include outreach work to develop skills and capacity across Hastings, and use this to build links to the Stade
- The fishing community is a central part of the Stade and the working fishing beach was critical in securing the Jerwood Foundation's interest in Hastings. There are ten proposed fishing culture projects celebrating the culture shaping the project location, with impacts which range from increasing the value of the catch landed to training and building links between the fishing community, other residents and visitors to Hastings

5.48 The planned cultural impact from these projects is:

- A programme of cultural activity accessible to a wide cross section of the resident population and visitors
- Recognition of the creativity within the wider population and using it to deliver community benefits
- A celebration of the role of the fishing community within the Stade and the rest of Hastings
- The lifting of the quality of the cultural sector in Hastings
- Building the profile of Hastings as a place to see and purchase art
- Building cultural links between the Stade and the wider population of Hastings through outreach, including communities otherwise at risk of being excluded from *The Stade* benefits

5.49 Overall it is anticipated that visual and performing arts attendance and participation will rise as part of the impact of the projects and events planned as part of *The Stade*.

5.50 In addition the continued activity of developing a programme of events has ensured that culture remains on the agenda of regeneration organisations as part of a dynamic process.

5.51 The events generated by *The Stade* will support the Arts Council's and the Borough Council's objectives of encouraging attendance and participation, including by BME, disabled and economically disadvantaged groups. The events and projects will also met the objective of using arts to benefit young people, support the creative sector, build vibrant communities, healthy living, build the image of Hastings through arts, and celebrate diversity.

Feedback from the Hastings' Resident and Visitor Surveys

5.52 The results form the Hastings residents and visitors survey provide an insight to the profile of the users of Hastings' town centre and old town.[73]

5.53 Overall satisfaction with Hastings town centre and old town as a place to visit for both residents and non-residents was considered to be okay to very good. Existing visitors to Hastings (74 percent) were more likely than local residents (53 percent) to say that Hastings town centre and old town were good or very good places to visit. However, no more than 5 percent of all visitors (including local residents) felt Hastings as place to visit to be poor.

5.54 This differs to the 21 percent of Hastings's residents and visitors that felt the seafront along the Old Town and The Stade was unattractive or very unattractive. Importantly, the appearance of the seafront influenced 54 percent of visitors' and 31 percent of residents' choice in visiting Hastings town centre/old town.

5.55 Half the residents we interviewed were visiting the town centre/old town primarily for shopping. Visitors were more likely to be visiting for a range of purposes, including the beach and relaxing/walking around or shopping (each accounting for 26 percent of responses) and visiting friends (17 percent). Culture/entertainment attractions were a primary attraction for only 2 percent of residents and 4 percent of existing visitors.

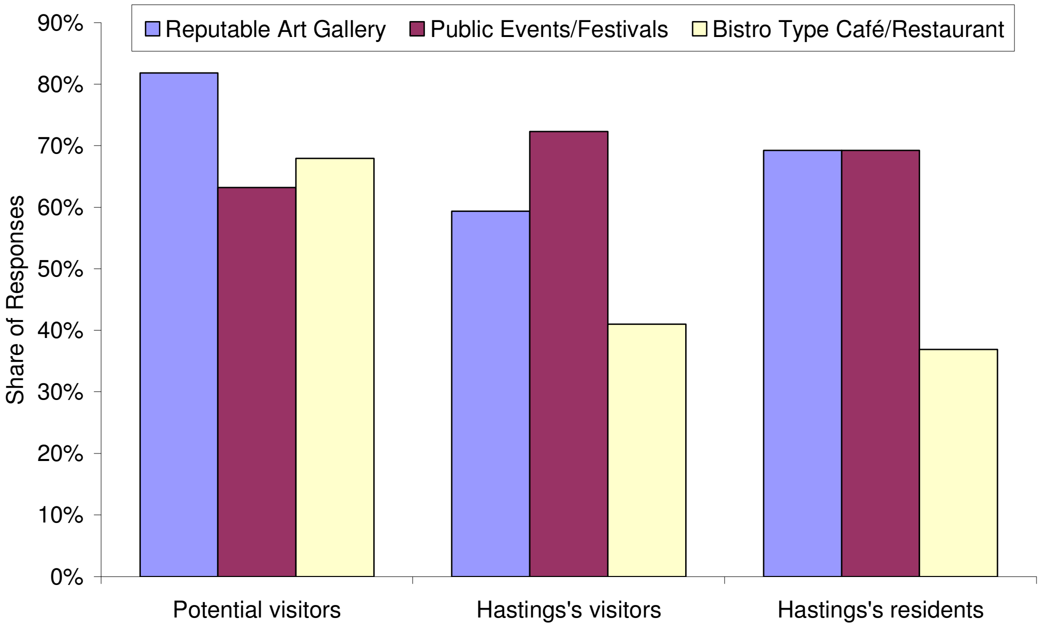
5.56 Unsurprisingly, 86 percent of residents were not visiting Hastings town centre/old town with the intention of visiting any attraction. This low influence from existing visitor attractions also featured among non-resident visitors, with only a third planning to visit

[73] Owing to the number of responses, these survey results should not be considered statistically significant; they do however provide for a useful and respectable insight into resident and visitor behaviour for the purpose of describing in this study.

attractions, and 36 percent of these considered shops or the town centre to be that attraction.

5.57 The impact that *The Stade* programme may have on residents, existing visitors and potential visitors (these are those interviewed outside Hastings) choosing to visit attractions/facilities in Hastings is shown in Figure 5.4. The surveys show that the art gallery was more popular among potential visitors than existing visitors and residents. This share was more than 60 percent among all three groups. In addition, the proposal for public events were popular, with 60 percent among all three groups being willing to attend such events. The proposed Bistro/Café was also popular among potential visitors (67 percent) but less so among existing visitors (41 percent) and residents (37 percent).

Figure 5.4 Share of Respondents that Would Attend the Following Facilities on The Stade in Hastings



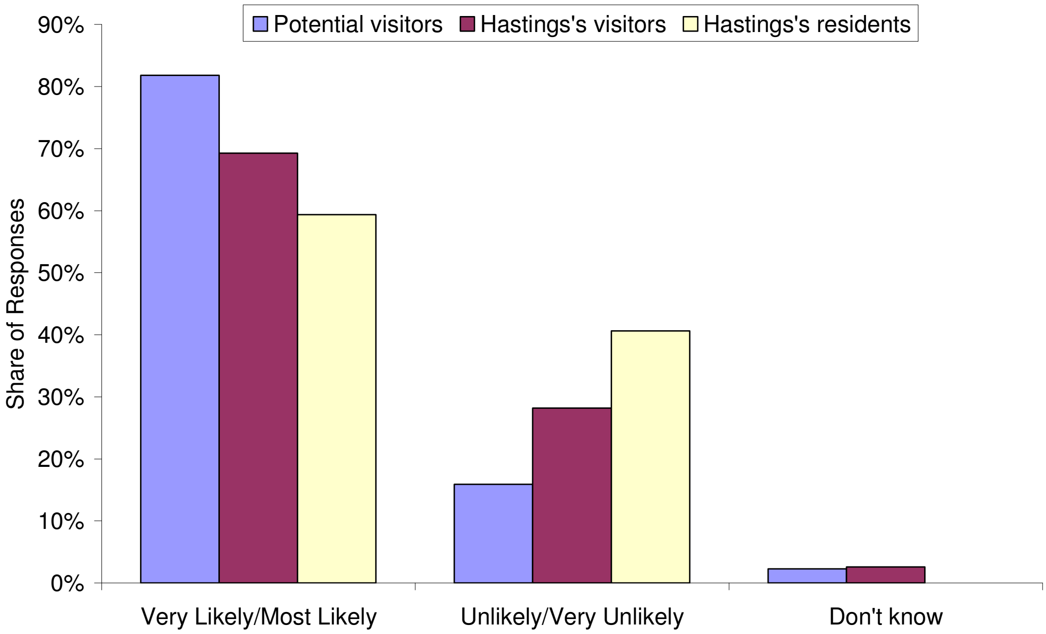
Source: RTP

5.58 During their last visit to attractions outside Hastings, cultural attraction (museum/gallery, theatres and heritage or stately homes) were the choice of 18 percent of Hastings's residents and 17 percent of Hastings's visitors that were surveyed. This preference is significantly lower than that found for potential visitors, with 36 percent having visited a cultural attraction. In addition, some 28 percent of Hastings's residents and visitors were regular visitors to galleries and exhibitions, which compares to 42 percent of potential visitors that were surveyed.

5.59 When we asked about how they would respond to a high quality public art gallery in Hastings with free entrance[74] the surveyed responses shown in Figure 5.5 suggest that the Art Gallery would be more appealing to our survey of potential visitors (82 percent) compared with existing visitors (60 percent) and local residents (69 percent).

[74] It was only after the survey had been completed (but before the survey results were known) that the intention for a free gallery changed to an entrance fee charge. Despite this, the results are still useful in helping to gauge the preferences of visitors.

Figure 5.5 Likelihood of Visiting High Quality Public Art Gallery in Hastings by Respondent Type



Source: RTP

5.60 Interestingly, 82 percent of potential visitors said they would visit a reputable art gallery in Hastings, and nearly half of these potential visitors, which is 41 percent of all responses, said that they would make a specific visit for this. This compares to only 58 percent that said that they were interested in visiting Hastings. These results suggest that the Jerwood Art Gallery could be a significant draw for new visitors.

5.61 The average potential visitors that gave a figure (non-answered and don't know responses were excluded), said that they would pay nearly £5 to visit a reputable art gallery in Hastings. Figure 5.6 shows that this is 20 percent to 40 percent more than the values given by Hastings's visitors and residents responses.

Figure 5.6 How Much Visitors Would Pay to Visit a Reputable Art Gallery in Hastings

Source: RTP

Conclusions

5.62 Hastings has a rich historic and contemporary culture, which is reflected in the built environment and the festivals, such as Jack in the Green, Coastal Currents, Walk the Fish, Seafood & Wine and Shot by the Beach. The cultural sector has grown, with 6,800 people employed in 2004. However much of the activity and growth has been in the sub-sectors concerned with distribution and production rather than content origination.

5.63 The key cultural facilities in Hastings are the Fishermen's Museum, Hastings Museum & Art Gallery and the Hastings Old Town Hall Museum – as well as two quite different theatres and a set of commercial visitor attractions, including the Flamingo Family Park on the Stade. The built and natural environment is an important part of the cultural provision in Hastings, particularly Pelham Beach and the Stade as well as the wider urban fabric in the Old Town and elsewhere in Hastings and St Leonards. The nearby De La Warr Pavilion at Bexhill provides visual and performing arts. The key cultural activities are the Seafood and Wine Festival, which takes place on the Stade, the Coastal Currents Arts Festival, Jack in the Green and the Hastings Bonfire Procession and Fireworks. Around these four festivals are a variety of other cultural events.

5.64 Many of the priorities for the development of culture in Hastings relate to the opportunities to tackle the problems faced. Experience in Hastings and elsewhere has demonstrated artists and arts organisations have capacity to help improve the quality of the town's environment, to contribute to the healthy living of its population and to support economic development and community safety work.

5.65 The overarching strategic priorities for the development of the arts are increasing participation (particularly by BME, disabled and economically disadvantaged groups), using the arts to benefit young people, supporting the creative economy, embedding culture into sustainable communities and reinforcing England's cultural leader role and celebrating diversity. Specific Hastings arts objectives include participation by young people, professional development, public art, arts infrastructure, festivals, arts and heath, and building the arts image of Hastings. Taken as a whole, the gallery, its exhibitions and the events and projects proposed for *The Stade* meet all of these objectives.

5.66 An important part of the cultural impact is through the process of developing the project. The inclusion of an artist on the design team, involving artist/curators in project development and ongoing programme (and the supporting awareness and commissioning budgets) will ensure that there are cultural benefits from the outset, with art embedded in the project.

5.67 The exhibition of the nationally significant Jerwood collection in Hastings will allow the engagement with high quality art by residents and visitors. The collection will encourage the development of community pride and a contemporary sense of identity. The temporary exhibitions in the gallery will provide visitors with challenging pieces and the opportunity to see emerging artists at the beginning of their careers. Part of the cultural impact will be through raising the profile of the arts community in Hastings and the role of *The Stade* as a focus for networking.

5.68 Other benefits from the involvement of the Jerwood Foundation stem from its reputation and the potent to lever in the involvement of other arts organisations and programmes. The impacts will include brokering advice and assistance to artists in Hastings from arts networks and high profile artists from partners such as Artangel, a higher local response for the open call for entry Jerwood prizes, the increased potential to have Jerwood Foundation revenue funding for Hastings projects, and arts advice to Hastings Borough Council.

5.69 The events proposed to take place around *The Stade* are an important part of the planned impacts:

- A programme of cultural activity accessible to a wide cross section of the resident population and visitors
- Recognition of the creativity within the wider population and using it to deliver community benefits
- A celebration of the role of the fishing community within the Stade and the rest of Hastings
- The lifting of the quality of the cultural sector in Hastings
- Building the profile of Hastings as a place to see and purchase art
- Building cultural links between the Stade and the wider population of Hastings through outreach, including communities otherwise at risk of being excluded from *The Stade* benefits

5.70 While the capital build project will produce many cultural impacts, the associated programme of revenue projects will be necessary to ensure the wider spectrum of impacts, especially the community cultural impacts and fishing community cultural impacts.

5.71 The events generated by *The Stade* will support many of the Arts Council's and the Borough Council's cultural objectives. This will include an increase visual and performing arts attendance and participation in Hastings.

6 COMMUNITY IMPACT OF *THE STADE*

Introduction

6.1 This section considers the potential community impact of *The Stade*. This section uses the review and discussion around the community impacts to undertake an equalities assessment.

Community Priorities

6.2 The community priorities have been identified through the Community Strategy[75], which was generated through a large consultation exercise in 2002. The key themes running through the Community Strategy are health, learning and skills, housing, regeneration and crime. There are 21 Community Strategy Targets:

1) Take the five most deprived wards out of the worst 10 percent nationally by 2013
2) Increase the percentage of local people satisfied with their neighbourhood as a place to live to 85 percent by 2013
3) Halve the gap between child poverty rates for Hastings and for East Sussex as a whole (measured as the proportion of children aged under 16 living in households dependent on means-tested benefits)
4) Increase the proportion of young people who think the town is a good place for them to live in. Identify 15 to 20 clear, measurable targets to improve young people's lives
5) Halve the gap between overall crime rates per 1000 for Hastings & St Leonards and the average for England & Wales
6) Increase the percentage of residents who feel safe walking alone in their local neighbourhood at night
7) Reduce average unemployment in the town to the East Sussex level by 2013
8) Increase average weekly earnings to national levels by 2013
9) Increase the percentage of 15 year-olds achieving 5 or more GCSEs at grades A* - C or equivalent from 40 percent in 2001 to 55 percent in 2013
10) Increase the number of residents who feel people from different backgrounds live harmoniously in the town
11) Ensure that residents of each ward have ready access to a community/education facility throughout the year
12) Ensure that 80 percent of residents have a neighbourhood forum or similar body so they can influence services and take decisions affecting their local area by 2013
13) Reduce death rates from circulatory disease (coronary heart disease and stroke) and cancer in people under 75, by at least 40 percent and 20 percent respectively by 2013
14) Reduce the under 18 conception rate by 50 percent by 2013
15) Reduce drug related deaths by 10 percent by 2005 and 20 percent by 2013
16) Build 3300 new homes by 2013
17) Remove the gap between our town and the national average for unfit homes

[75] Hastings and St Leonards Community Strategy 2003-2013, 2003 (and updated 2006), Hastings Borough Council

18) Eradicate the use of Bed & Breakfast accommodation for all homeless households, except in emergency (measured as nonemergency households placed in B&B as a percentage of all households placed in temporary accommodation)
19) Increase the total number of bus passenger journeys by 20 percent compared with 2001 levels
20) Give 90 percent of households access to open space such as parks, Local Nature Reserves, public gardens and play areas or the beach, within 300mn of their homes by 2013
21) Increase the amount of household waste recycled and composted to 30 percent by 2013

Attending and Participating in the Arts

6.3 Attendance in the arts is strongly linked to education and social status, with the higher an individual's level of education and social status, the more likely they are to have high levels of arts attendance[76].

6.4 Within this overall involvement, women are more likely to attend than men, older people are more likely to attend than younger people, white people are more likely to attend than Black or Asian people, Londoners are more likely to attend than those living elsewhere, people without children are more likely to attend than those without and people in good health are more likely to attend than those with poor health[77].

- While some barriers to attendance may be practical, some relate to concept of identity, which combines self-perception, social peers and lifestyle
- The majority of adults who are involved with the arts both attend and participate78 - 77 percent of the population in England either attended or participated, 43 percent did both
- People with a limiting disability are less likely to attend or participate in arts events79

6.5 These facts suggest that without some intervention, new arts facilities and projects may perpetuate these preferences and provide few benefits to those who are less wealthy, have lower educational attainment, Black and Asian people, people with children and people with a disability or poor health.

Potential Community Impacts

6.6 Previous cultural projects Hastings[80] have demonstrated a set of social impacts, illustrating the range and scale of benefits from the arts. Further details of these projects can be found in the appendices to this document. Project impacts have included:

- Improved community identity and cohesion, though establishing a role for people to shape activities that have an impact on their neighbourhoods, and working with different groups in doing so
- Establishing and extending social networks

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[76] From indifference to enthusiasm: patterns of arts attendance in England, 2008, Arts Council England
[77] From indifference to enthusiasm, ibid
[78] Informing Change, 2007, Arts Council England
[79] Informing Change, ibid
[80] Vital Currents - The Arts, Social Inclusion and Community Regeneration, ibid; and The Casebook - programmes, projects and partnerships, Creative Partnerships, Hastings and East Sussex

- Better access to cultural activity by a cross section of the community, including those excluded from many of society's activities
- Celebrating and using creativity
- Environmental renewal
- Professional development of the local artistic community and support to the local cultural economy
- Enhanced local cultural identity and contribution to the re-imaging of Hastings
- Enhanced individuals' creative and team building skills, improved social contacts and engaged young people in community activities
- Therapeutic benefits for people affected by serious illness
- Established the role of street arts in helping to regenerate the town centre and assist in reducing crime
- Developed links between the youth service and local arts organisations through demonstrating the value of arts-based youth work
- Engaged disadvantaged young people in structured learning
- Improved contacts and social networks amongst adult asylum seekers
- Broadened local resources for engaging young people and providing an effective vehicle for social and issue-based training
- Incentivised school attendance
- Improved self confidence in children and group co-operation
- Improved children's speaking and listening skills, and a greater responsibility for learning

Other Examples

6.7 Examples of the benefits from cultural activity from elsewhere in the UK include[81]:

- Participatory arts organisations encouraging a variety of people to learn together and take action in their communities
- Collaboration between arts organisations and cross-sector partners, such as arts and health organisations supporting health promotion and contributing to therapeutic processes and improved clinical environments
- Amateur /voluntary arts organisations engaging large numbers of people to enrich cultural life, encourage active citizenship and develop individual talents
- Arts projects reducing the rates of teenage pregnancy and sexually transmitted infection
- Arts projects developing community pride, increasing road safety, developing community capacity and improving nutrition and exercise

6.8 The local and other examples demonstrate how arts and culture can contribute to effective community regeneration work as part of targeted interventions, through helping individuals and communities redefine themselves[82]. Active involvement in arts offers individuals a route for personal expression, personal growth and the development of new practical and creative skills. Taking part in collective creative work is an effective way of building social networks and understanding across communities.

[81] Fusion, 2006, Arts Council England

[82] Vital Currents - The Arts, Social Inclusion and Community Regeneration, 2005, Hastings Borough Council

The Stade Community Activity

6.9 The community impact of *The Stade* will stem from the development of the project, and participating and attendance in arts events.

6.10 *The Stade* will include a wide range of events and projects on the square and in the community/education facility. There is a commitment by Hastings Borough Council to deliver a programme of events with partners, and new funding has been committed to underpin this programme. The cultural impact of these events has already been discussed in this report and the key community aspects of this programme are:

- The development of the project will be guided through community involvement, involving an artist on the design team. This will allow a community voice in the design
- Many of projects proposed were community and community-based cultural events. These included a set of festivals celebrating the role of different parts of the community, representing additional activity around traditional festivals and newer events. The projects seek to use *The Stade* as an opportunity to enhance or extend existing work rather than displace it from elsewhere in the town. These projects involve younger people, people with disabilities and older people. The larger of these projects include outreach work to develop skills and capacity across Hastings, and use this to build links to the Stade. In this way, *The Stade* will be the catalyst for a series of new projects addressing community cohesion, community safety, educational attainment and health
- The fishing community is a central part of the Stade and the working fishing beach was critical in securing the Jerwood Foundation's interest in Hastings. There are ten fishing projects with impacts on the fishing community. These celebrate the culture shaping the project location, with impacts which range from increasing the value of the catch landed to training and building links between the fishing community, other residents and visitors to Hastings

6.11 In addition, the Jerwood Gallery will also build up a range of outreach activities at the gallery, with dedicated staff resources. These will focus on arts activity and will provide community benefits – with a particular with an education emphasis for children and young people, and for practising artists. This area of work is already apparent at the Jerwood Sculture Collection at Ragley, which has developed curriculum modules as part of its educational outreach.

6.12 There will be a positive impact on community pride through the successful delivery of a high profile project. The history of failed projects on this site makes this aspect particularly important. *The Stade* will also have an impact on community pride through helping to generate a contemporary image of Hastings as a place to live.

6.13 The economic impacts from the project discussed elsewhere in this report will provide a set of community benefits through increased prosperity and investment.

6.14 Part of the community impact will stem from the provision of accessible community/education facility to meet identified demand. The square will also provide a quality outdoor public space for informal community use as well as events.

Assessment of Community Impacts

6.15 The table below uses the discussion about the likely impacts from *The Stade* to consider how they will address the community priorities set out in the Community Strategy. This assessment is heavily dependent upon the successful implementation of a programme of *The Stade* outreach projects as well as the capital project.

The Stade Community Impacts

Community Priority	Impact of *The Stade*
1) Take the five most deprived wards out of the worst 10% nationally by 2013	Economic impact will contribute to prosperity across Hastings
2) Increase the percentage of local people satisfied with their neighbourhood as a place to live to 85% by 2013	Improvement to Stade environment will increase Old Town resident satisfaction. Successful delivery of the project and of associated programme will increase Hastings and St Leonards satisfaction.
3) Halve the gap between child poverty rates for Hastings and for East Sussex as a whole (measured as the proportion of children aged under 16 living in households dependent on means-tested benefits)	No direct impacts
4) Increase the proportion of young people who think the town is a good place for them to live in. Identify 15 to 20 clear, measurable targets to improve young people's lives	Successful delivery of the project and of associated programme will improve the view of the town by young people.
5) Halve the gap between overall crime rates per 1000 for Hastings & St Leonards and the average for England & Wales	May be indirect impacts from the associated programme of events, particularly if they include people at risk of offending
6) Increase the percentage of residents who feel safe walking alone in their local neighbourhood at night	May be indirect impacts from the associated programme of events, particularly if they include people at risk of offending
7) Reduce average unemployment in the town to the East Sussex level by 2013	Economic impact will contribute to employment across Hastings. Likely economic benefits to the creative sector will increase employment.
8) Increase average weekly earnings to national levels by 2013	Economic impact will contribute to the value of employment across Hastings. Likely economic benefits to the creative sector will increase the value of employment.
9) Increase the percentage of 15 year-olds achieving 5 or more GCSEs at grades A* - C or equivalent from 40% in 2001 to 55% in 2013	Should be indirect impacts from the associated programme of events, particularly arts education projects and their impact upon achievement across the curriculum
10) Increase the number of residents who feel people from different backgrounds live harmoniously in the town	Should be indirect impacts from the associated programme of events, particularly arts projects targeted towards increasing understanding and communication between different parts of society in Hastings and St Leonards.
11) Ensure that residents of each ward have ready access to a community/education facility throughout the year	Accessible community/education facility as part of *The Stade* will contribute towards this objective
12) Ensure that 80% of residents have a neighbourhood forum or similar body so they can influence services and take decisions affecting their local area by 2013	No direct impacts although the further development of the project will include arts-led community consultation and will use this to shape *The Stade*

Community Priority	Impact of *The Stade*
13) Reduce death rates from circulatory disease (coronary heart disease and stroke) and cancer in people under 75, by at least 40% and 20% respectively by 2013	Arts and health projects as part of the associated programme will contribute towards this objective
14) Reduce the under 18 conception rate by 50% by 2013	Arts and health projects as part of the associated programme will contribute towards this objective
15) Reduce drug related deaths by 10% by 2005 and 20% by 2013	Arts and health projects as part of the associated programme will contribute towards this objective
16) Build 3300 new homes by 2013	No direct impacts although changed perception of Hastings will contribute towards private sector investment and delivery of new homes
17) Remove the gap between our town and the national average for unfit homes	No direct impact
18) Eradicate the use of Bed & Breakfast accommodation for all homeless households, except in emergency (measured as nonemergency households placed in B&B as a percentage of all households placed in temporary accommodation)	No direct impact
19) Increase the total number of bus passenger journeys by 20% compared with 2001 levels	Emphasis on sustainable transport for Jerwood visitors will contribute towards this objective
20) Give 90% of households access to open space such as parks, Local Nature Reserves, public gardens and play areas or the beach, within 300mn of their homes by 2013	*The Stade* square will contribute towards this objective
21) Increase the amount of household waste recycled and composted to 30% by 2013	No direct impact

Source: Community Strategy 2003 and RTP

Equalities Assessment

6.16 Equalities Impact Assessments are used to assess the impact of a programme or project upon the range of people in an area, through a systematic approach. The reason behind this type of assessment is to understand whether there is a disproportionate impact upon a particular group of people. These types of assessment are often used to improve policies, programmes and projects, to ensure they promote equality and do not discriminate.

6.17 The steps to take for an Equality Impact Assessment are:

- Identify the purpose and aims of the project
- Review information already available in relation to equalities
- Make an assessment of the impacts on different communities
- Consider whether there is anything to be done to mitigate against or remove adverse impacts (or promote further equality, social inclusion or community cohesion)
- Consult those affected, for their views
- Decide whether to go ahead with the project
- Monitor and review

6.18 Factors which can relate to inequality are[83]:

- Age
- Disability
- Faith
- Gender
- Race
- Sexuality

Project Purpose and Aims

6.19 The aim of *The Stade* is the creation of a visitor and resident cultural destination of national significance that contributes to the regeneration of the town. The project will stimulate new artistic and cultural activity in this key historic town on the south coast, reinforcing Hastings' sense of identity and building local community pride. *The Stade* will have a significant physical and economic impact and will help address high levels of worklessness, low aspiration and improve social cohesion with a culture-led regeneration programme that transforms Hastings' visitor and cultural economy.

Equalities Information

- Age - Hastings' age profile is very similar to the rest of the South East and England
- Disability - there is a higher proportion of people with a disability or limiting long-term illness in Hastings than the average for the rest of the South East or England.
- Faith - There are fewer Christians, Hindus, Jews, Muslims and Sikhs in Hastings than the average for the rest of the South East or England, and more people with no religion
- Race - Hastings has a less diverse population than the average for the rest of the South East and England
- Sexuality - There are more same sex couples in Hastings than the average for the rest of the South East and England

6.20 In addition, Hastings has a much higher proportion of conceptions under the age of 18 than the average for the rest of the South East and England, as well as more violent crimes per head of population. Fewer pupils in Hastings gain five GCSEs A-C than the average for the rest of East Sussex, the South East and England. Further detail about the statistics relating to all of these inequality factors can be found in the appendix to this report.

6.21 The discussion earlier in this section has highlighted that arts attendance and participation is typically more affluent, educated older white people in good health. In terms of the factors that reduce the likelihood of attendance and participation in the arts, the higher proportion of people with disabilities, lower educational attainment and young mothers in Hastings suggest that there will need to be measures to address the inequality of their access to *The Stade*.

Mitigating Actions

6.22 The range of projects and events discussed above and elsewhere in this document provide a set of mitigating actions that will reduce inequalities of access, by targeting specific groups in Hastings. The discussion has noted projects that plan to involve younger people, people with disabilities and older people through outreach work. There may be a case for reviewing the scope of these projects to determine whether additional work should be commissioned to address inequalities outside these groups.

[83] Based on the most common inequality factors from a review of range of Equalities Assessments

6.23 As well as the specific targeted projects, the range of events that are also proposed for the Stade may address some of these equalities by broadening the attractiveness of attendance or participation. It will be necessary to undertake further research in due course to determine whether events are able to address inequalities.

6.24 In addition, measures to reduce costs for local people or groups of local people will also serve as an encouragement to attend and participate. This will need to be considered when admission/ticket prices are set for those events that seek to raise revenue in this way.

Consultation

6.25 The development of *The Stade* will include consultation involving the artist on the design team and this should provide further information on some of these issues. In addition, the plans to develop a strategic framework of events will need to explicitly consider inequalities when deciding where the priorities should fall.

Conclusions

6.26 Previous cultural projects locally and from elsewhere have demonstrated a set of social impacts. These have included improved community identity and cohesion, extended social networks and access to cultural activity by people excluded from many of society's activities. Other impacts include therapeutic benefits for people affected by serious illness, reducing the rates of teenage pregnancy and sexually transmitted infection, crime reduction and social networks amongst adult asylum seekers. Benefits for children and young people include improved self confidence and group co-operation, providing an effective vehicle for social and issue-based training, and better school attendance.

6.27 *The Stade* will be the catalyst for a series of new projects addressing community cohesion, community safety, educational attainment and health. These impacts will be through a wide range of events and projects on the square and in the community/education facility. The key community impacts of this programme are through community involvement in the project development through the artist on the design team and through a new set of festivals celebrating the role of different parts of the community. These projects involve younger people, people with disabilities and older people, with some projects including outreach work to develop skills and capacity across Hastings, and use this to build links to the Stade. There are ten fishing projects with direct impacts on the fishing community.

6.28 *The Stade* projects address the issue of arts attendance being strongly linked to education and social status, with the higher an individual's level of education and social status, the more likely they are to have high levels of arts attendance. Without some intervention, new arts facilities and projects may perpetuate these preferences and provide few benefits to those who are less wealthy, have lower educational attainment, Black and Asian people, people with children and people with a disability or poor health.

6.29 In addition, the Jerwood Gallery will also build up a range of outreach activities which will also provide,educationally-focussed community benefits.

6.30 Other community impacts will stem from:

- Enhanced community pride through the successful delivery of a high profile project.
- Providing residents with a contemporary image of Hastings as a place to live
- Generating prosperity though economic benefits
- Provision of accessible community/education facility to meet identified demand and quality outdoor public space for informal community use as well as events on the square

6.31 *The Stade* directly or indirectly addresses 15 of the 21 community priority targets identified in the Community Strategy.

6.32 The initial equalities assessment undertaken as part of this community impact section has indicated that:

- Some of the groups likely to suffer inequality in access to arts projects such as *The Stade* are over-represented in Hastings
- There is a case for reviewing the range of projects and events that may be catalysed by *The Stade* in order to ensure that the range of inequalities is addressed
- There is also a case for undertaking further research amongst attendees and participants in events and projects in due course to test whether inequalities are being addressed
- Broad measures to encourage attendance and participation such as reduced costs for local people or groups of people should be considered
- The proposed strategic framework of *The Stade* events and projects should explicitly consider some of the inequality issues raised

7 ENVIRONMENTAL IMPACT OF *THE STADE*

Introduction

7.1 This section of the impact report looks at three environmental aspects of *The Stade*:

1) Site impact
2) Buildings impact
3) Transport impact

7.2 The discussion below considers each of these three impacts.

Site Impact

Context

7.3 The site is located between Hastings Old Town and the Stade working fishing beach. This area is distinctive and unique, with its heritage-protected net-huts and Europe's largest working fishing beach. There are traditional seaside attractions, and access via the cliff railway to miles of protected coastal Country Park. The Old Town has a combination of half-timbered Tudor houses and boutiques, galleries, restaurants and venues.

7.4 The site is prominent, situated where the A259 turns onto the seafront and visible to those on foot and in vehicles travelling along the seafront from the west or approaching Hastings on the Bourne/Old London Road.

The Site

7.5 The site is currently a coach and lorry park, with a run-down toilet block/information centre and a snack bar.

The Stade

Coach parking at the Stade

7.6 The site will be used to accommodate a new art gallery, public square and café. The adjacent East Hastings Angling Club building (just to the west of the main site) will be remodelled to provide accessible community/education facility.

***The Stade* Masterplan Preferred Option**

7.7 The Seafront Strategy[84] identifies the site as a "zone of change" where a greatly improved environment could be created for visitors and residents alike. The strategy includes the following specific points:

"removal of the existing car and coach parking facilities and replacement with a coach drop off area and other public visitor facilities and edge of town long term coach parking"

"area wide environmental and townscape improvements …… provide stronger connections to the Old Town, Rock-a-Nore beach and the Country Park"

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[84] Hastings and Bexhill Seafront Strategy, 2005, Sea Space, Tourism South East, Hastings Borough Council and Rother District Council

7.8 The proposed development is planned to be high quality:

"The design vision for the Stade is to create a flexible and beautiful new public space for all who live in and visit Hastings, with new buildings of high architectural quality and civic presence. It should be a place where everyone feels welcome to relax, enjoy the beach views, play, meet friends and attend events."

"The design options aim to bring the Stade site back into year-round use, with robust landscaping that reflects the beach location and links the beach back into the Old Town."

"Materials should be long-lasting and high quality, and the design should aim to be elegant and characterful, as well as long-lasting and low maintenance. Making the new space feel welcoming at all times of day and night is a key priority. The new public spaces should be well-lit and should maximise the passive surveillance of the area by injecting new activity that creates an active and vibrant public realm."

7.9 The Jerwood Foundation is particularly keen to ensure the architectural excellence of its gallery and the other parts of the scheme. Previous schemes with capital funding support from the Jerwood Foundation include the RIBA award winning Young Vic and Royal Court Theatres.

7.10 The reshaping of the Stade by the proposed scheme would meet the seafront strategic objectives. The environment will be greatly improved by replacing the unsightly coach and lorry park with a high quality new public space and public buildings.

Buildings Impact

7.11 The design for the gallery is being developed in advance of the other elements of the site, with the inclusion of ground source heat pumps, solar thermal, rainwater harvesting and a variety of other innovative sustainability measures being considered.

7.12 Galleries are traditionally high energy use buildings and this gallery is aiming to reduce the CO_2 load of the building by about 18 tonnes from 45 to 27 tonnes per annum (i.e. saving around 40%). These savings are the result of the very high building fabric energy performance compared to a conventional building, which will optimise the impact of sustainable energy measures discussed above.

7.13 The design of the other buildings on the site (café, toilets and community/education facility) will be developed in due course and it is expected that they will follow the masterplan guidelines regarding resource use.

7.14 The key aspects of the proposed environmental strategy for the Stade[85] are:

- The Building Fabric should be designed to surpass the minimum requirements set out in the Building Regulations Approved Document Part L2a
- The buildings will be sited to minimise the need for artificial lighting and reduce electrical energy consumption. Optimising north and south elevation glazing will enable high levels of daylight with a degree of solar control
- The design will include water saving strategies, such as low flush toilets and non-concussive spray taps. The building roof footprint presents an opportunity for collection of rainwater for flushing of WCs
- The design will utilise efficient services and controls, including high frequency and high efficiency lamps for light fittings, daylight linked and absence detection lighting controls, optimised and compensated heating controls, high efficiency condensing boilers, variable speed control on pumps and fans, etc.

[85] Stade Masterplan, 2008, Hat Projects

7.15 While there is considerably more design detail to be developed for *The Stade*, it is clear that reducing the environmental impact of the all of the buildings is important, and that the gallery will be a flagship sustainable building.

Transport Impact

7.16 The local transport objectives are[86]:

- **Improve access to services by providing greater travel choices and influencing land use decisions.** This includes rebalancing preferred choice of transport towards non-car modes and promoting and improving facilities for walking, cycling and public transport, so that these modes are safe and attractive options. It also includes ensuring development is appropriately and sustainably located
- **Manage demand and reduce the need to travel by private car**, which will contribute to the aim of widening social inclusion by improving access to work, learning, health and shops
- **Improve road safety and reduce fear of crime in communities**
- **Reduce congestion and improve the efficiency of the transport network**
- **Protect, promote and enhance the Environment**
- **Better maintenance and management of the transport network**

7.17 Although the site will be well used by people visiting the gallery, square, café and community/education facility, there will be no parking on site except for two gallery staff spaces and disabled parking near the community/education facility. Disabled parking will also continue to be provided nearby on Rock-a-Nore Road. Visitors will access *The Stade* by bus or on foot – the railway station is approximately 15 minutes walk away offering services to London, Ashford and Eastbourne/Lewes and beyond, and the town centre is approximately 10 minutes walk away. *The Stade* is accessible by bicycle, particularly from the cycle route running east-west along the sea front and cycle parking wil be provided on the site.

7.18 Part of the reason for the choice of the Stade for the Jerwood Gallery was its attractiveness as a town centre location that could be easily accessed by non-car transport.

7.19 We are aware that the majority of visitors in the South East use their cars to access destinations – 78% of staying visitors arrived by car in 2006[87]. As discussed elsewhere in this document, it is likely that *The Stade* will generate new visitors and as a result, there will be some new car-borne visitors. We believe that the mode of transport chosen by visitors will depend upon a variety of factors, including their origin – those within easy reach of the railway service from London are likely to use the train while it may be more attractive to use the car from some other locations in the South East. The pattern of visitor origin will depend on the way marketing is targeted. Visitors who are obliged to use cars to access *The Stade* will continue to be able to use Rock-A-Nore Road car park, which has 450 spaces as well as other nearby car parks.

7.20 One of the transport impacts from *The Stade* will be the improvement of the junction between the A359 and Rock-a-Nore Road. This will particularly improve pedestrian safety as well as reducing traffic congestion through greater efficiency and improving traffic safety.

7.21 *The Stade* fits local transport objective 1 (appropriately and sustainably located) and objective 2 (reducing the need to travel by car).

[86] Local Transport Plan 2006-11, East Sussex County Council

[87] Facts of Tourism 2006, Tourism South East

Conclusions

7.22 *The Stade* will deliver environmental benefits by replacing a low value unattractive use of a prominent site in Hastings with a high quality, attractive location. The planned development delivers the strategic land use objectives for this site.

7.23 There is a clear intent to minimise the energy use and CO_2 emissions from the operation of the buildings on the Stade. The gallery plans, which are being developed in advance of the other buildings, indicate at least a 40 percent CO_2 saving compared to comparable galleries.

7.24 The site was chosen because of its easily accessible town centre location. There are a number of non-car methods of accessing the Stade, including walking links to the railway. As discussed elsewhere in this document, it is likely that *The Stade* will generate new visitors and as a result, there will be some new car-borne visitors.

8 CONCLUSIONS

Local Context

8.1 Hastings is one of the most deprived districts in the England, ranking most deprived in the South East Region, and second most deprived resort across the country. More alarmingly, Hastings's comparative position has worsened in recent years. Strategies have formed to meet the deep rooted challenges of poor economic performance in Hastings, coupled with proposals for improving quality of life for it residents.

8.2 *The Stade* is a programme that is seeking to enable this improvements, with a strong focus on the direct and indirect benefits it can achieve from new investment in the Old Town Seafront area of Hastings. The programme of activity includes a new Art Gallery run by the Jerwood Foundation and associated improvements to the public realm and local tourism facilities on the Stade. As part of the public realm improvements, there are plans to increase the number of public events and festivals with a strong focus on cultural offerings.

8.3 While Hastings is unlikely to be a hot bed of activity, it does have potential to build on its strengths, including its world renowned heritage, beautiful natural environment and a growing movement for change, focusing on improvements in education attainment, business enterprise, and burgeoning creative and cultural business sector.

Economic Impacts

8.4 Drawing on findings from *The Stade* Business Plan[88], evidence of cultural and public realm project impacts, visitor, resident and business survey responses and a number of assumptions using respected guidance, we have generated an informed forecast of the measurable economic value of *The Stade* to the Hastings economy.

8.5 The findings suggest that *The Stade*, once fully developed and operating at full capacity, offers the potential for nearly £2mn in direct annual revenue and some 30 local jobs. In addition, a further £11.7mn in revenue will be derived indirectly from supply purchases, the spending generated by visitors to *The Stade* and second round multiplier effects.

8.6 After allowing for deadweight, displacement and leakage, it is estimated that in a stable year, the additionality offered by *The Stade* programme to the Hastings economy is worth annually some £9.5mn in additional revenue to the local economy of Hastings, adding nearly £3.2mn in gross value added and supporting an additional 112 local jobs, including 95 Hastings residents in jobs.

8.7 This measured impact alone suggests that the £8.5 mn of development investment for *The Stade* could be paid back to Hastings within three years of full stable year operation. And given the relative deprivation and high impact of worklessness in Hastings, should Hastings's residents fill the expected 99 additional jobs then with the exception of a few (more) deprived areas, the impact is all the more greater than the same jobs elsewhere, including all other parts of the South East region.

8.8 In addition, a number of catalytic benefits to the economy are also expected, including boosting investment through:

- Enhancing image
- Attracting investment
- Producing high returns on investments
- Increasing land and property values

[88] Roger Tym & Partners (October 2008), *(Draft) The Stade Business Plan*

- Improving productivity
- Helping to deliver more lettable area (higher densities)
- Differentiating places and raising their prestige
- Opening up investment opportunities, raising confidence in development opportunities

8.9 While these catalytic benefits are difficult to measure, there is strong support and recognition among local business groups, investors and stakeholders that the *The Stade* programme will contribute to this package of wider benefit. In particular, *The Stade* is seen to be a significant contributor for achieving long term impacts through better place-making and adding to local aspirations.

Development Momentum

8.10 Hastings has been moving forward in recent years. There is momentum built up with developments at University Centre Hastings, Laguna Place, Priory Meadows, and others. But it is necessary to maintain this momentum. Developers and investors follow a positive market. In doing so, *The Stade* should be seen as part of the overall regeneration, particularly along the seafront, along with the Pelham Crescent, Marina Pavilion and the De La Warr Pavilion in Bexhill. Whilst each of these developments brings significant benefits in its own right the synergistic impact of all three is greater than the sum of the component parts

Cultural Impacts

8.11 *The Stade* will clearly produce a set of cultural impacts. Many of these will stem from the exhibition of the nationally significant Jerwood collection in Hastings, which will allow the engagement with high quality art by residents and visitors. The temporary exhibitions in the gallery will provide visitors with challenging pieces and the opportunity to see emerging artists at the beginning of their careers. The inclusion of elite art within the project is important in terms of leadership, profile and setting quality standards. It is also important in terms of the wider catalytic impacts.

8.12 The importance of collection will encourage the development of community pride and a contemporary sense of identity. Part of the cultural impact will be through raising the profile of the arts community in Hastings. An important part of the cultural impact is through the process of developing the project. The inclusion of an artist on the design team to guide the design and consultation processes will ensure that there are cultural benefits from the outset, with art embedded in the project.

8.13 Other benefits from the involvement of the Jerwood Foundation stem from its reputation and the potent to lever in the involvement of other arts organisations and programmes. Although unquantifiable at this stage, the potential from this additional leverage is substantial and will need continued commitment and discussion to capitalise on this opportunity.

8.14 The cultural impacts also stem from harnessing the creativity of local people. Although the quality of the artistic output may vary, the bottom-up approach from community participation in the arts brings its own set of cultural benefits and the events proposed to take place around *The Stade* are a vital part of this process.

8.15 The events generated by *The Stade* will support many of the Arts Council's and the Borough Council's cultural objectives relating to attendance and participation overall and amongst priority groups in Hastings - BME, disabled and economically disadvantaged groups, using the arts to benefit young people etc.

Community Impacts

8.16 There will be a strong set of community benefits from *The Stade*, most of which will derive from the projects associated with the capital build. It is planned that the projects to be run by the Jerwood Gallery, Hastings Borough Council and other partners will specifically address community cohesion, community safety, educational attainment and health. The key community impacts of this programme start through community involvement in the project development with the artist on the design team. Other benefits include enhanced community pride, a contemporary image of Hastings as a place to live and provision of accessible community/education facility to meet identified demand and provision of quality outdoor public space for informal community use as well as events.

8.17 The range of planned projects involve younger people, people with disabilities and older people, with some projects including outreach work to develop skills and capacity across Hastings, and use this to build links to the Stade. The range of planned projects includes some projects with direct benefits to the fishing community.

8.18 *The Stade* projects address the issue of arts attendance being strongly linked to education and social status, with the higher an individual's level of education and social status, the more likely they are to have high levels of arts attendance. Many if the planned projects encourage the involvement of the groups least likely to benefit.

8.19 *The Stade* directly or indirectly addresses 15 of the 21 community priority targets identified in the Community Strategy.

Environmental Impacts

8.20 There will be environmental benefits through transforming the Stade into a high quality, attractive location. As well as the benefits within the site, this will produce environmental benefits to the surrounding area. Although galleries are traditionally high energy use buildings, the design work thus far demonstrates that the Jerwood Gallery will have a much smaller environmental footprint than comparable facilities.

8.21 There are also environmental benefits to be gained from the easily accessible town centre location; although we conclude that there will be some environmental impact from new car-borne visitors.

APPENDIX 1

Index of Deprivation 2007 at SOA Level

IMD Indicators 2007

(red)	Bottom 20% in England
(green)	Top 20% in England

Super Output Area	Equivalent Ward	Overall IMD	Income Score	Employment Score	Health Deprivation and Disability Score	Education Skills and Training Score	Barriers to Housing and Services Score	Crime and Disorder Score	Living Environment Score
E01020969	Ashdown	49%	55%	49%	32%	49%	37%	48%	52%
E01020970	Ashdown	72%	84%	81%	68%	77%	7%	70%	90%
E01020971	Ashdown	29%	30%	20%	25%	20%	34%	77%	63%
E01020972	Baird	1%	1%	1%	3%	2%	21%	13%	35%
E01020973	Baird	35%	31%	44%	38%	25%	19%	37%	57%
E01020974	Baird	41%	49%	36%	30%	40%	37%	23%	73%
E01020975	Braybrooke	23%	29%	26%	22%	48%	16%	17%	11%
E01020976	Braybrooke	31%	38%	31%	33%	56%	16%	16%	33%
E01020977	Braybrooke	19%	22%	19%	19%	23%	42%	29%	7%
E01020978	Castle	8%	14%	9%	18%	19%	33%	2%	3%
E01020979	Castle	5%	16%	3%	8%	19%	26%	1%	6%
E01020980	Castle	11%	16%	8%	10%	26%	38%	11%	9%
E01020981	Castle	23%	22%	21%	23%	35%	50%	20%	16%
E01020982	Central St Leonards	4%	9%	2%	3%	21%	30%	17%	3%
E01020983	Central St Leonards	2%	4%	2%	3%	12%	33%	4%	13%
E01020984	Central St Leonards	4%	12%	2%	6%	23%	30%	3%	2%
E01020985	Central St Leonards	10%	18%	5%	11%	36%	28%	12%	3%
E01020986	Conquest	63%	75%	61%	63%	51%	12%	76%	78%
E01020987	Conquest	69%	68%	81%	46%	48%	36%	67%	81%
E01020988	Conquest	63%	73%	53%	49%	43%	40%	63%	82%
E01020989	Gensing	3%	12%	1%	2%	22%	25%	6%	4%
E01020990	Gensing	14%	13%	14%	14%	30%	45%	43%	2%
E01020991	Gensing	31%	41%	27%	15%	55%	28%	43%	25%
E01020992	Gensing	8%	7%	6%	8%	31%	30%	11%	10%
E01020993	Hollington	10%	7%	9%	12%	7%	42%	24%	39%
E01020994	Hollington	14%	11%	20%	15%	3%	28%	47%	71%
E01020995	Hollington	9%	8%	10%	8%	3%	37%	27%	92%
E01020996	Hollington	24%	21%	33%	25%	20%	8%	27%	84%
E01020997	Maze Hill	30%	28%	32%	30%	23%	17%	45%	67%
E01020998	Maze Hill	16%	24%	9%	9%	61%	31%	28%	9%
E01020999	Maze Hill	65%	72%	66%	46%	52%	42%	59%	59%
E01021000	Old Hastings	47%	45%	56%	43%	50%	52%	49%	17%
E01021001	Old Hastings	48%	51%	51%	38%	51%	50%	42%	26%
E01021002	Old Hastings	26%	42%	35%	34%	35%	22%	3%	22%
E01021003	Old Hastings	16%	21%	16%	17%	49%	40%	3%	10%
E01021004	Ore	34%	42%	45%	33%	29%	40%	11%	29%
E01021005	Ore	8%	6%	7%	8%	6%	38%	27%	40%
E01021006	Ore	35%	31%	43%	45%	40%	26%	34%	23%
E01021007	St Helens	61%	72%	60%	45%	64%	13%	68%	83%

E01021008	St Helens	45%	46%	52%	45%	46%	15%	63%	33%
E01021009	St Helens	58%	66%	61%	51%	48%	18%	76%	55%
E01021010	Silverhill	60%	72%	60%	52%	45%	53%	55%	32%
E01021011	Silverhill	37%	41%	38%	36%	35%	51%	45%	16%
E01021012	Silverhill	26%	31%	20%	24%	49%	40%	15%	18%
E01021013	Tressell	33%	35%	40%	34%	23%	55%	21%	29%
E01021014	Tressell	15%	13%	16%	19%	18%	46%	27%	8%
E01021015	Tressell	1%	1%	3%	3%	4%	16%	10%	29%
E01021016	West St Leonards	23%	28%	21%	21%	28%	19%	31%	20%
E01021017	West St Leonards	36%	47%	43%	35%	28%	22%	29%	32%
E01021018	West St Leonards	52%	55%	62%	43%	50%	26%	35%	55%
E01021019	Wishing Tree	6%	8%	2%	5%	11%	44%	41%	23%
E01021020	Wishing Tree	22%	20%	20%	19%	17%	25%	40%	53%
E01021021	Wishing Tree	44%	44%	42%	35%	51%	32%	38%	58%

Source: DCLG, 2007

APPENDIX 2

Assumptions and Values Used in Estimating Economic Impact

Assumtions

Variable	Value	Source
***The Stade* (construction)**		
The Stade revenue	£8,638,000	Advised by HBC
Contruction revenue per employee	£198,035	UK PLC (2006): Construction Sales per Employee (grossed up from 2006 to 2008)
Permanent job years	10	Standard recommended in English Partnerships *Employment Densities Guidance (2001)*
Jerwood Gallery		
PT:FT jobs ratio	2.5	Standard recommended for Retail/leisure/restaurants in English Partnerships *Employment Densities Guidance (2001)*
Gallery permanent jobs	6	Advised by Jerwood
Gallery revenue per employee	£59,210	UK PLC (2006): Libraries and Museums Sales per Employee (grossed up from 2006 to 2008)
Gallery job annual earnings	£14,040	ASHE (2006): annual gross earnings for South East Recreational, cultural and sporting activities jobs
Job earnings on-costs	125%	Assume 25% for NI, pension, etc
Gallery supplier spend	£250,000	Advised by Jerwood
Supplier revenue per employee	£139,180	UK PLC (2006): Sales per Employee unweighted average across Food, Printing, Property, Retail, Business Service and Hospitality sectors (grossed up from 2006 to 2008)
Gallery entrance fee for non-resident adult visitors	£5.00	Advised by Jerwood
Gallery entrance fee for resident adult visitors	£2.00	Advised by Jerwood
Non-Gallery spend per visitor	£57.20	50% increase on TSE estimate for visitor spend (minus entrance fee to Jerwood)
Gallery visits	150,000	Advised by Jerwood
Proportion of non-school visits	85%	Advised by Jerwood
No. of non-school visits to Gallery	127,500	
Proportion of non-resident visits	78%	Informed by visitor surveys for Tate St.Ives (78%) and De La Warr Pavillion (73% but this is a free facility - hence more local people likely)
No. of non-resident non-school visits to Gallery	99,450	
No. of resident visits to Gallery	28,050	
Main purpose of visit to Hastings is Gallery	56%	Informed by RTP potential visitor surveys that estimates 56% of potential visitors said they attend galleries regulaly, would visit one in Hastings and would make a specific trip to do so.
No. of net additional non-resident non-school visits to Gallery	55,692	
Visitor spend revenue per employee	£101,157	UK PLC (2006): Sales per Employee unweighted average across Retail and Hospitality/Tourism sectors (grossed up from 2006 to 2008)
Jerwood Gallery Cafe		
Jerwood Cafe no. of covers	30	Advised by Jerwood
Jerwood Cafe revenue per cover	£3,000	Informed by recent café lets/sales in Hastings (see table below)

Jerwood Cafe revenue per employee	£42,654	UK PLC (2006): Restaurants Sales per Employee (grossed up from 2006 to 2008)
Job earnings on-costs	125%	Assume 25% for NI, pension, etc
Jerwood Cafe supplier spend	£35,000	Based on info from Jerwood
Supplier revenue per employee	£139,180	UK PLC (2006): Sales per Employee unweighted average across Food, Printing, Property, Retail, Business Service and Hospitality sectors (grossed up from 2006 to 2008)
Stade Square (events management)		
Stade Square (events management) jobs	1.0	Advised by HBC
Stade Square (events management) revenue per employee	£78,413	UK PLC (2006): Management of Real Estate Sales per Employee (grossed up from 2006 to 2008)
Supplier revenue per employee	£139,180	UK PLC (2006): Sales per Employee unweighted average across Food, Printing, Property, Retail, Business Service and Hospitality sectors (grossed up from 2006 to 2008)
Stade Square Events spend per visitor	£38.13	TSE (2006) *EIA of Tourism in Hastings* (grossed up from 2006 to 2008)
Public Events on Stade Square visits	180,000	Info from discussion with local organisations
Proportion of adult visits	85%	Advised by Jerwood
No. of non-school visits to Event	153,000	RTP assumption
Proportion of non-resident visits	45%	Informed by Seafood & Wine Festival Evaluation
No. of non-resident non-school visits to Event	69,073	RTP assumption
Main purpose of visit to Hastings is Event	73%	Same proportion to the De La Warr Pavillion which like the Stade Events is a free facility
No. of net additional non-resident non-school visits to Event	50,423	RTP assumption
Visitor spend revenue per employee	£101,157	UK PLC (2006): Sales per Employee unweighted average across Retail and Hospitality/Tourism sectors (grossed up from 2006 to 2008)
Stade Café/Restaurant		
Stade Café/Restaurant Jobs	7.1	Flsp fig (185 sq m internal + 1/4 outside (only used part of yr) / EP emp density for restaurant (13 sq m) / PT:FT emp
Stade Cafe revenue per employee	£42,654	UK PLC (2006): Restaurants Sales per Employee (grossed up from 2006 to 2008)
Café job annual earnings	10,977.2	ASHE (2006): annual gross earnings for South East Hotels and Restaurants
Revenue spend after profit	80%	Assuming 20% for profit
Supplier revenue per employee	£139,180	UK PLC (2006): Sales per Employee unweighted average across Food, Printing, Property, Retail, Business Service and Hospitality sectors (grossed up from 2006 to 2008)
Community/Education Facility		
Community/education facility jobs	0.5	Info from East Hastings Angling Club
Community/education facility revenue per employee	£40,356	UK PLC (2006): Health and Social Care Sales per employee (grossed up from 2006 to 2008)
Supplier revenue per employee	£139,180	UK PLC (2006): Sales per Employee unweighted average across Food, Printing, Property, Retail, Business Service and Hospitality sectors (grossed up from 2006 to 2008)

Community/education facility job annual earnings	£16,900	ASHE (2006): annual gross earnings for South East Other Community, Social and Personal Service Activities jobs
Generic Assumptions		
Multiplier (second round effect)	38%	Government guidance, TSE Tourism EIA and Brighton Centre EIA
Tom's Cabin revenue per employee (displacement)	£34,702	UK PLC (2006): Restaurants Sales per Employee
Proportion of business spend in Hastings	54%	Q14 responses in Hastings Business Survey
Proportion of jobs taken by Hastings residents	85%	Q13 responses in Hastings Business Survey
GVA per employee	£33,307	UK Blue Book (2006): GVA in all service sectors / jobs in all service sectors (grossed up from 2006 to 2008)

Research into Cafes and Restaurants on the market in Hastings (18 Sept 08)

Type	Asking Price	Seats (no.)	Sales (£k)	Gross Profit (£k)	Rent pa (£k)	Lease length (yrs)	T/O per cover (£k)
Chinese Restaurant	79k	76	115k	83k	20k	15	1.5k
Chinese Restaurant	60k	60	?	?	20k	?	
Daytime café	25	?	73k	?	8.4k	15	
Daytime café	50k	28	75k	48k	10k	?	2.7k
Daytime café	30k	?	52k	65%	8k	?	
Restaurant (seasonal)	115	82	82 (32 wks)	54k	12k	20	1.0k
Fish & Chips Restaurant	100k	90	250k	?	32k	15	2.8k
Café / Bistro	288k	?	64k	65%	F/H		

Source: http://uk.businessesforsale.com/uk/Business-Region/UK/England/South-East/East-Sussex/business-for-sale-in-Hastings.aspx

APPENDIX 3

Hastings' Residents/Visitors, Potential Visitor and Business Survey Results

Hastings Residents and Visitor Survey Results

1. Do you live, work or study in Hastings?

	Responses	Share
	No.	%
Yes	65	63%
No	39	38%
Total	104	100%

2. What town, county or

	Responses	Share
	No.	%
Battle	3	8%
Tunbridge Wells	2	5%
Other East Sussex	5	13%
Other South East	11	28%
London	10	26%
Other UK	7	18%
Overseas	1	3%
Total	39	100%

3. How long is your visit to Hastings?

	Responses	Share of Responses	
	No.	All	All exc: DK
0-3 hours	5	13%	14%
4-9 hours	14	36%	39%
1 day	8	21%	22%
2-7 days	6	15%	17%
7+ days	3	8%	8%
DK	3	8%	
Total Responses	39	100%	
Total Responses (exc: DK)	36		100%

4. Not including this trip, approximately how many times have you visited Hastings in the last 5 years?

	Responses	Share of Responses	
	No.	All	All exc: DK
None	4	10%	14%
1-5 Times	11	28%	38%
6-10 Times	3	8%	10%
11-20 Times	5	13%	17%
20+	6	15%	21%
DK	10	26%	
Total Responses	39	100%	
Total Responses (exc: DK)	29		100%

5. How often do you visit Hastings town centre or old town?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
First time	0	0%	0%	4	10%	67%
1-3 times/month	6	10%	11%	1	3%	17%
1-3 Times/week	34	58%	60%	1	3%	17%
4-7 Times/week	23	39%	40%	0	0%	0%
DK	2	3%		33	85%	
Total Responses	59	110%		39	100%	
Total Responses (exc: DK)	57		111%	6		100%

6. What is your experience of Hastings town centre and old town as a place to visit?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Very Good	10	15%	23%	13	33%	33%
Good	13	20%	30%	16	41%	41%
Okay	18	28%	42%	9	23%	23%
Poor	2	3%	5%	1	3%	3%
Very Poor	0	0%	0%	0	0%	0%
DK	22	34%		0	0%	
Total Responses	65	100%		39	100%	
Total Responses (exc: DK)	43		100%	39		100%

7.What is the main purpose of your visit to Hastings (old town/town centre) today?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Shopping	32	49%	51%	6	15%	26%
Eating	5	8%	8%	3	8%	13%
Culture/entertainment	1	2%	2%	1	3%	4%
Beach	0	0%	0%	6	15%	26%
Walk around/relax	15	23%	24%	6	15%	26%
Visiting friends or family	5	8%	8%	4	10%	17%
Business	9	14%	14%	3	8%	13%
Other	7	11%	11%	1	3%	4%
DK	2	3%		16	41%	
Total Responses	76	117%		46	118%	
Total Responders	65			39		
Total Responders (exc: DK)	63		117%	23		130%

8. Have you, or are you intending to, visit any attractions in Hastings during this trip?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Yes	9	14%	14%	13	33%	35%
No	54	83%	86%	24	62%	65%
DK	2	3%		2	5%	
Total Responses	65	100%		39	100%	
Total Responses (exc: DK)	63		100%	37		100%

8b. If Yes, which one?

	Local Residents	Proportion	Visitors	Proportion
Beach	1	11%	0	0%
Castle	2	22%	3	27%
Caves	0	0%	1	9%
Cliffs	1	11%	0	0%
Fairground/Rides	2	22%	1	9%
Festival	0	0%	1	9%
Underwater World/Sea life	2	22%	1	9%
Town Centre/shops (old/new)	1	11%	4	36%
Mini Golf	0	0%	1	9%
Other	2	22%	0	0%
Total Responses	11	122%	12	109%
Total Responders	9		11	

9. What was the last attraction that you visited outside of your hometown, outside Hastings, and not during visits to family or friends or on business trips?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Museum/gallery	1	2%	3%	2	5%	11%
Heritage or stately homes/gardens	4	6%	12%	0	0%	0%
London West End	5	8%	15%	2	5%	11%
Theatre	1	2%	3%	1	3%	6%
Theme park or zoo	4	6%	12%	2	5%	11%
Amusements/funfair	2	3%	6%	1	3%	6%
Other	16	25%	48%	10	26%	56%
DK	32	49%		21	54%	
Total	65	100%		39	100%	
Total Responses (exc: DK)	33		100%	18		100%

10. Do you regularly visit art galleries/exhibitions?

	Local Residents	Proportion	Visitors	Proportion
Yes	18	28%	11	28%
No	47	72%	28	72%
Total	65	100%	39	100%

11. Are any of these located in Hastings?

	Local Residents	Proportion	Visitors	Proportion
Yes	14	78%	2	18%
No	4	22%	9	82%
Total	18	100%	11	100%

12. There is a proposal to build a new public gallery of modern art at The Stade with free entrance. How likely are you to…

	Very Likely			Most Likely			Unlikely			Very Unlikely			Don't Know		
	Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK
Visit it? (visitors)	14	36%	37%	13	33%	34%	2	6%	7%	9	22%	22%	1	3%	
(resident)	23	36%	36%	15	24%	24%	5	8%	8%	21	32%	32%	0	0%	
Total	37	36%	36%	28	27%	28%	8	7%	8%	29	28%	29%	2	2%	
Visit more than once? (visitors)	5	12%	14%	6	16%	18%	12	32%	36%	11	27%	31%	5	13%	
(resident)	8	13%	18%	12	19%	26%	7	10%	15%	18	29%	41%	19	30%	
Total	13	12%	16%	18	17%	23%	19	19%	24%	30	29%	37%	24	23%	
For Non-residents only															
Make a specific visit to Hastings to visit it?	1	3%	4%	6	15%	23%	11	28%	43%	8	20%	30%	13	33%	
Stay longer in Hastings to visit it?	1	3%	3%	6	15%	18%	7	19%	23%	19	48%	56%	6	15%	
Make this an overnight visit?	0	0%	0%	2	5%	7%	3	7%	10%	22	57%	82%	12	31%	

13. To enter such a gallery, how much would you be willing to pay or give as a donation?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
None	3	5%	9%	1	3%	4%
£.01-5	24	37%	75%	25	64%	89%
£6-10	5	8%	16%	1	3%	4%
£10+	0	0%	0%	1	3%	4%
DK	33	51%		11	28%	
Total Responses	65	100%		39	100%	
Total Responses (exc: DK)	32		100%	28		100%

14. How do you rate the general appearance of the seafront along the Old Town and The Stade?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Very Attractive	4	6%	7%	3	8%	8%
Attractive	37	57%	61%	24	62%	63%
Neither Attractive of Unattractive	7	11%	11%	3	8%	8%
Unattractive	10	15%	16%	3	8%	8%
Very Unattractive	3	5%	5%	5	13%	13%
DK	4	6%		1	3%	
Total	65	100%		39	100%	
Total Responses (exc: DK)	61		100%	38		100%

15. Does the appearance of the seafront influence how often you visit Hastings?

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Yes	19	29%	31%	21	54%	54%
No	43	66%	69%	18	46%	46%
DK	3	5%		0	0%	
Total	65	100%		39	100%	
Total Responses (exc: DK)	62		100%	39		100%

16. Would a Bistro type café/restaurant on the seafront in the Old Town/Stade area increase the number

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Yes	24	37%	42%	16	41%	43%
No	33	51%	58%	21	54%	57%
DK	8	12%		2	5%	
Total	65	100%		39	100%	
Total Responses (exc: DK)	57		100%	37		100%

17. Would additional public events on the seafront in the Old town (ie, The Stade) increase the number of visits you would make to this area?

	Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Yes	47	72%	77%	27	69%	75%
No	14	22%	23%	9	23%	25%
DK	4	6%		3	8%	
Total	65	100%		39	100%	
Total Responses (exc: DK)	61		100%	36		100%

18. What type of public festival/events would you like see in Hastings

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Music Fest. modern & classical	14	22%	29%	8	21%	24%
Art Fest. (St./outdoor art)	6	9%	13%	0	0%	0%
Cultural Events	0	0%	0%	4	10%	12%
Family & Children Events	6	9%	13%	5	13%	15%
Historical Events	0	0%	0%	1	3%	3%
Air Shows	1	2%	2%	1	3%	3%
Food & Beer Fest.	1	2%	2%	2	5%	6%
Carnivals	5	8%	10%	2	5%	6%
Sport Events	3	5%	6%	0	0%	0%
Markets (Farmers, Arts&Craft)	1	2%	2%	0	0%	0%
Other	12	18%	25%	17	44%	50%
As it is / None / DK	17	26%		5	13%	
Total Responses	49	102%		40	103%	
Total Responders	65			39		
Total Responders (exc: DK)	48		102%	34		118%

Potential Visitor Survey Results

1. Where do you live?

Tunbridge Wells	27
Croydon	5
Canary Wharf/Greenwich	11
Other London	31
South East	27
Other UK	2
Overseas	3
Total Responses	106

2. Have you ever visited Hastings?

Visited	67	63%
Never Visited	39	37%
Total	106	100%

3. What is your experience of Hastings as a place to visit?

	Responses	Share of Responses	
	No.	All	All exc: DK
Very Good	3	4%	5%
Good	21	31%	36%
Okay	18	27%	31%
Poor	12	18%	21%
Very Poor	4	6%	7%
Dk	9	13%	
Total Responses	67	100%	
Total Responses (exc: DK)	58		100%

4. Approximately how many times have you visited Hastings in the last 5 years?

None	57	54%
1-5 Times	36	34%
6-10 Times	6	6%
11-20 Times	2	2%
20+	5	5%
Total Responses	106	100%

5. What was the main purpose of your visit(s) to Hastings?

	Responses	Share of Responses	
	No.	All	All exc: DK
Beach	17	25%	26%
Business	3	4%	5%
Culture/entertainment	7	10%	11%
Eating	5	7%	8%
Shopping	8	12%	12%
Visit friends/family	11	16%	17%
Walk around/relax	29	43%	45%
Other	19	28%	29%
Dk	2	3%	
Responses	101	151%	
Number of Responders	67	100%	
Total Responders (exc: DK)	65		152%

6. Are you intending to visit Hastings in the future

	Responses	Share of Responses	
	No.	All	All exc: DK
Will Visit	41	39%	48%
Won't Visit	45	42%	52%
Dk	20	19%	
Total	106	100%	
Total Responses (exc: DK)	86		100%

7. Have you, or are you intending to, visit any attractions in Hastings

	Responses	Share of Responses	
	No.	All	All exc: DK
Yes	21	20%	38%
No	35	33%	63%
Dk	50	47%	
Total	106	100%	
Total Responses (exc: DK)	56		100%

7.B If yes, which?

	Responses	Share of Responses	
	No.	All	All exc: DK
Beach	4	19%	24%
Seafront	4	19%	24%
Caves	4	19%	24%
Minigolf	2	10%	12%
Battle 1066	2	10%	12%
Cliffs	1	5%	6%
Theatre	1	5%	6%
Sea Life Centre	1	5%	6%
Old Town	1	5%	6%
Other	2	10%	12%
Dk	4	19%	
Total Responses	26	124%	
Total Responders	21		
Total Responders (exc: DK)	17		129%

8. What was the last attraction that you visited outside of Hastings and your hometown?

	Responses	Share of Responses	
	No.	All	All exc: DK
Museum/gallery	10	9%	10%
Heritage or stately homes/gardens	24	23%	23%
London West End	10	9%	10%
Theatre	3	3%	3%
Cinema	10	9%	10%
Theme park or zoo	9	8%	9%
Amusements/funfair	2	2%	2%
Other	35	33%	34%
Dk	3	3%	
Total	106	100%	
Total Responses (exc: DK)	103		100%

9. Do you regularly (e.g., 2/3 x

Yes	44	42%
No	62	58%
Total	106	100%

10. Are any of these located in Hastings

Yes	2	5%
No	42	95%
Total	44	100%

11. There are plans for a high quality public art gallery in Hastings with free entrance. How likely are you to

	Very Likely			Most Likely			Unlikely			Very Unlikely			Dk		
	Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK
Visit it?	11	25%	26%	25	57%	58%	4	9%	9%	3	7%	7%	1	2%	
Visit more than once?	2	5%	11%	16	36%	84%	1	2%	5%	0	0%	0%	25	57%	
Make a specific visit to Hastings to visit it?	3	7%	10%	17	39%	55%	6	14%	19%	5	11%	16%	13	30%	
Stay longer in Hastings to visit it?	1	2%	3%	15	34%	47%	9	20%	28%	7	16%	22%	12	27%	
Make this an overnight visit?	1	2%	3%	2	5%	6%	7	16%	20%	25	57%	71%	9	20%	

12. Normally, how much would you pay or give as a donation to visit a reputable art gallery?

	Responses	Share of Responses	
	No.	All	All exc: DK
None**	16	15%	19%
£.01-5	49	46%	58%
£6-10	16	15%	19%
£10+	4	4%	5%
Dk	21	20%	
Total Responses	106	100%	
Total Responses (exc: DK)	85		100%

13. Would a good quality Bistro type café/restaurant on the seafront increase the number of visits or the likelihood of you visiting Hastings?

	Responses	Share of Responses	
	No.	All	All exc: DK
Yes	72	68%	71%
No	29	27%	29%
Dk	5	5%	
Total	106	100%	
Total Responses (exc: DK)	101		100%

14. Would a variety of regular public events on the seafront increase the number of visits or the likelihood of you visiting Hastings?

	Responses	Share of Responses	
	No.	All	All exc: DK
Yes	67	63%	72%
No	26	25%	28%
Dk	13	12%	
Total	106	100%	
Total Responses (exc: DK)	93		100%

Business Survey Results

1. How important are the tourism facilities (attractions, events) in Hastings to your business?

	Responses	Share of Responses	
	No.	All	All exc: DK
Very Important	46	61%	64%
Important	17	23%	24%
Neither Important nor Unimportant	9	12%	13%
Very Unimportant	0	0%	0%
Dk	3	4%	
Total Responses	75	100%	
Total Responses (exc: DK)	72		100%

2. How important are the following customers to your business

	Local Residents			Visitors		
	Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK
Very Important	66	88%	89%	51	68%	69%
Important	8	11%	11%	13	17%	18%
Neither Important nor Unimportant	0	0%	0%	6	8%	8%
Unimportant	0	0%	0%	4	5%	5%
Dk	1	1%		1	1%	
Total Responses	75	100%		75	100%	
Total Responses (exc: DK)	74		100%	74		100%

3. How would you describe the income status of your main customers/clients?

	Responses	Share of Responses	
	No.	All	All exc: DK
Predominately low income	13	17%	18%
Predominately middle income	17	23%	24%
Predominately high income	3	4%	4%
A mix of income types	39	52%	54%
Don't know	3	4%	
Total Responses	75	100%	
Total Responses (exc: DK)	72		100%

4. Do you consider that a free, high quality, public art gallery located on The Stade would generate…

	Responses	Share of Responses	
	No.	All	All exc: DK
A significant increase in your business?	7	9%	10%
A modest increase in your business?	10	13%	15%
A minor increase in your business?	16	21%	24%
A minor loss in your business?	0	0%	0%
A modest loss in your business?	2	3%	3%
A significant loss in your business?	1	1%	1%
No change in your business?	31	41%	46%
Don't know	8	11%	
Total Responses	75	100%	
Total Responses (exc: DK)	67		100%

5. Do you consider that street improvements (eg, path widening, landscaping) along the seafront between The Stade and Pelham Place/Breeds Place roundabout would generate….

	Responses	Share of Responses	
	No.	All	All exc: DK
A significant increase in your business?	9	12%	13%
A modest increase in your business?	12	16%	18%
A minor increase in your business?	9	12%	13%
A minor loss in your business?	1	1%	1%
A modest loss in your business?		0%	0%
A significant loss in your business?	3	4%	4%
No change in your business?	33	44%	49%
Don't know	8	11%	
Total Responses	75	100%	
Total Responses (exc: DK)	67		100%

6. Do you consider that a year-round programme of weekend and occasional evening events on The Stade in Hastings would generate …

	Responses	Share of Responses	
	No.	All	All exc: DK
A significant increase in your business?	14	19%	19%
A modest increase in your business?	15	20%	21%
A minor increase in your business?	16	21%	22%
A minor loss in your business?	1	1%	1%
A modest loss in your business?	3	4%	4%
A significant loss in your business?	3	4%	4%
No change in your business?	20	27%	28%
Don't know	3	4%	
Total Responses	75	100%	
Total Responses (exc: DK)	72		100%

7. What type of public events or festivals would you like to see in Hastings that would improve your business?

**Open ended

8. Please rate changes in your business activity during the following events and festival held in Hastings?

	Jack-in-the-Green weekend			Old Town Carnival			Hastings Week			Bonfire celebration			Half marathon			Sea Food &Wine Festival			Coastal Currents Festival		
	Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK
Extremely Positive	18	24%	26%	13	17%	20%	6	8%	9%	13	17%	20%	9	12%	15%	13	17%	21%	7	9%	12%
Significantly Positive	12	16%	18%	10	13%	15%	18	24%	28%	6	8%	9%	3	4%	5%	5	7%	8%	2	3%	3%
Minor Positive	13	17%	19%	16	21%	24%	17	23%	26%	15	20%	23%	9	12%	15%	10	13%	16%	13	17%	22%
Minor Negative	2	3%	3%	2	3%	3%	3	4%	5%	5	7%	8%	8	11%	13%	4	5%	6%	5	7%	8%
Significantly Negative	4	5%	6%	5	7%	8%	3	4%	5%	4	5%	6%	3	4%	5%	3	4%	5%	1	1%	2%
Extremely Negative	3	4%	4%	2	3%	3%	1	1%	2%	1	1%	2%	1	1%	2%	2	3%	3%	2	3%	3%
No effect	16	21%	24%	18	24%	27%	17	23%	26%	21	28%	32%	29	39%	47%	25	33%	40%	29	39%	49%
Dk	7	9%		9	12%		10	13%		10	13%		13	17%		13	17%		16	21%	
Total	75	100%		75	100%		75	100%		75	100%		75	100%		75	100%		75	100%	
Total Responses (exc: DK)	68		100%	66		100%	65		100%	65		100%	62		100%	62		100%	59		100%

9. For the event with the greatest benefit, please rate how this benefits you on a scale of 1 (no impact) to 5 (significant impact).

	More Customers			Higher spending customers			lore leads, enquiries or follow-up busines			Improved overall image of the town		
	Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses		Responses	Share of Responses	
	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK	No.	All	All exc: DK
5	20	27%	38%	6	8%	13%	7	9%	16%	19	25%	40%
4	8	11%	15%	6	8%	13%	8	11%	18%	10	13%	21%
3	8	11%	15%	11	15%	24%	6	8%	14%	7	9%	15%
2	6	8%	12%	7	9%	15%	10	13%	23%	5	7%	11%
1	10	13%	19%	16	21%	35%	13	17%	30%	6	8%	13%
Dk	23	31%		29	39%		31	41%		28	37%	
Total	75	100%		75	100%		75	100%		75	100%	
Total Responses (exc: DK)	52		100%	46		100%	44		100%	47		100%

10. Please tick the approximate increase in turnover resulting from this event

	Responses	Share of Responses	
	No.	All	All exc: DK
1-5%	10	13%	27%
5-10%	3	4%	8%
10-15%	8	11%	22%
15-20%	4	5%	11%
20-25%	2	3%	5%
25-50%	5	7%	14%
50%+	5	7%	14%
Dk	38	51%	
Total	75	100%	
Total Responses (exc: DK)	37		100%

11. Would any of the above changes to The Stade area (ie, new gallery, bistro, events/festivals, street improvements) encourage you to make changes to your business premises or operations?

	Responses	Share of Responders	
	No.	All	All exc: DK
No change	61	81%	87%
Yes, increase investment	7	9%	10%
Yes, decrease investment	0	0%	0%
Relocate within Hastings	0	0%	0%
Relocate outside Hastings	0	0%	0%
Close Business	1	1%	1%
Open/establish additional businesses/outlet(s)	5	7%	7%
Change, or move into a new market	1	1%	1%
Other	0	0%	0%
Dk	5	7%	
Total Responses	80	107%	
Total Responders	75		
Total Responders (exc: Dk)	70		107%

12. Including owners/directors, how many staff does your business employ in Hastings?

	Full-time	Part-time	Total
Permanent	283	143	426
Temporary	46	894	940

13. Roughly what number or percentage of your workforce (inc. owners/directors) live in…

	All reponses	Exc: Dk
Hastings & St. Leonards	80%	85%
Bexhill/Rother	8%	8%
Elsewhere	7%	7%
Dk	5%	

14. Roughly what proportion of your business expenditure (exc. labour costs) is spent in…

	All reponses	Exc: Dk
Hastings & St. Leonards	50%	54%
Bexhill/Rother	7%	7%
Elsewhere	36%	39%
Dk	7%	

15. Approximately, what proportion of your business is from tourism?

Average Percent	35%

16. Which of the following best describes your activity?

	Responses are	of Responses
	No.	All
Other retail	35	47%
Business/Finance	13	17%
Visitor Attraction	7	9%
Café/Restaurant	6	8%
Hotels/B&B	6	8%
Pub/Bar	6	8%
Distribution	2	3%
Total	75	100%

17. Which of these best describes your business?

	Responses	Share of Responses	
	No.	All	All exc: DK
Self-employed	18	24%	25%
National or international chain	14	19%	20%
Locally based limited company	32	43%	45%
Charity or social enterprise	2	3%	3%
Other (please specify)	5	7%	7%
Dk	4	5%	
Total	75	100%	
Total Responses (exc: DK)	71		100%

APPENDIX 4

Cultural Facilities in Hastings

Cultural Facilities in Hastings

Type	Name	Location	Adult Admission	Description
Adventure	Clambers	White Rock Gardens	£6.00	Childrens play & adventure golf course
Animal	Hastings Blue Reef Aquarium	Rock a Nore Road	£7.50	Aquarium with over 40 living displays
Art Centre	St Mary in the Castle	Pelham Crescent	n/a	Arts centre with theatre space with semi-circular seating for 500 people, a large cinema screen, a meeting room and art gallery. Now operated by a faith group, with little current arts activity.
Cinema	Electric Palace Cinema	Old Town	£5.50	70 seat independent cinema, home of the annual 'Shot by the Sea' Film Festival
Guided walk	Old Town Ghost Walk	Old Town	£4.00	Regular guided walks through the Old Town
Museum	Fishermen's Museum	Stade	Free	Former Church now run as a museum by the Fisherman's Protection Society and Old Hastings Preservation Society. Contains vessels, models, photos, paintings, nets, ropes and fishing artefacts. Still used for christenings and baptisms, with a carol concert every Christmas
Museum	Flower Makers Museum	Old Town	£1.00	A leading supplier of flower and plant props for film and television, with a museum
Museum	Hastings Museum and Art Gallery	Bohemia Road	Free	Displays relating to local themes and the culture of other lands
Museum	Hastings Castle	West Hill	£3.75	Castle
Museum	Hastings Embroidery	Town Hall	Free	Victorian tapestry - to protect it from deterioration, the embroidery is in storage but the first panel (the Battle of Hastings) and the final panel (the invention of television) can be seen
Museum	Old Town Hall Museum	Old Town	Free	Walk back in time through the history of Hastings Old Town
Other	Cliff Railways	East Hill and West Hill	£1.80	Two furnicular railways, West Hill provides access to Hastings Country Park, the Castle and Smugglers Adventure
Other	The Amsterdam	Bulverhythe	n/a	Dutch East Indiaman grounded off St Leonards in a violent storm in 1749. The black timbers of this sunken ship can be seen at low tides at the far western end of St Leonards
Other	Flamingo Family Fun Park	Stade	Per ride	Family rides including a rollercoaster, dodgems and boating lake. There is also a range of rides for smaller children. There is an amusement arcade adjacent to the park with over 300 modern machines
Public space	Stream and Marine Court	St Leonards	n/a	Stream' is a lighting installation created by local artist Esther Rolinson and Marine Court is a sea-front ocean liner shaped art-deco building completed in 1937.

Type	Name	Location	Adult Admission	Description
Public space	Burton St Leonards trail	St Leonards	n/a	Unique example of a Regency new town with many buildings still standing from 1828
Public space	Blue Plaques Trail	Hastings & St Leonards	n/a	Four areas - Old Town, Hastings, St Leonards and West St Leonards
Public space	Pelham Beach	Old Town	n/a	500 metre stretch of wind-sculpted shingle dunes and fine low tide sand
Public space	Hastings Country Park	Hastings	Free	267 hectares of ancient woodland, heathland and grassland together with 5 kilometres of cliffs and coastline
Public space	Alexandra Park	Hastings/St Leonards	Free	This 109 acre park is a grade 2 designated site. The Lower Park has a Boating Lake, War Memorial, Bowls Green, Information Point, toilets, café, events areas, Bandstand and Adventure Playground
Public space	The Stade	Old Town	Free	The shingle beach from which the fishing fleet has launched for 1,000 years. Home to Europe's largest beach-launched fishing fleet and the historic 'Net Huts'.
Sport	Hastings Adventure Golf	Marine Parade	£5.00	The home of UK miniature Golf - three 18-hole courses
Theatre	White Rock Theatre	White Rock	c.£10-£20	Premier arts venue on Hastings seafront theatre, comedy and dance shows and a capacity of 1,066 seats in its auditorium
Theatre	Stables Theatre	Old Town	c.£10-£14	Auditiorium of 126 seats, fully accessible; plus art gallery. Ten amateur productions pa plus new art exhibition each month. Run by volunteers.
Visitor Centre	Shipwreck and Coastal Heritage Centre	Rock a Nore Road	Free	Telling the story of the maritime Hastings area - encouraging people to explore the 'maritime park' shore at low tide.
Visitor Centre	Smugglers Adventure	St Clements Caves	£6.75	Caverns used to exhibit Hastings' history of smugglers, bootleggers and warring gangs. They became a tourist attraction in Victorian times
Visitor Centre	Lifeboat Station	Stade	Free	The Lifeboat Station is home to an all-weather lifeboat, inshore lifeboat and a visitor centre

Source: http://www.visithastings.com/hastings/attractions/default.aspx, other www and personal contact

Cultural Events in Hastings

Type	Title	Dates	Location	Notes
Arts festival	Coastal Currents	Friday 29 August 2008 - 21 September 2008	Hastings	Theatre, street arts, live arts performances and Open Studios
Arts festival	Grease is the Word; Eat@ the Park Cafe	Saturday 30 August 2008	Alexandra Park	Open air music & cinema
Arts festival	Late and Live Street Arts	Thursday 04 September 2008	Priory Meadow and Hastings Town Centre	Street art event
Charity arts event	Fashion Fushion	Saturday 30 August 2008		Fashion Show in aid of St Michael's hospice and Sara Lee Trust. Various stalls, live bands, food stalls, raffle
Cinema	Gay and Lesbian Film Season	Wednesday 03 September 2008 - 14 September 2008	Electric Palace	Film season
Festival	Hastings Bonfire Procession and Fireworks	Saturday 18 October 2008	Hastings seafront and town centre	Part of Hastings week
Festival	Hastings Day	Tuesday 14 October 2008	Hastings	Part of Hastings week - relates to 1066
Festival	Hastings Gun Carriage Tournament	Saturday 27 September 2008	The Oval, Bohemia Road, Hastings	Annual event
Festival	Hastings Old Town Carnival Week	Saturday 01 August 2009 - 09 August 2009	Old Town	Events and carnival parade
Festival	Jack in the Green Festival	Friday 01 May 2009 - 04 May 2009	Old Town	Traditional May Festival
Festival	The National Town Criers' Championship	Saturday 18 October 2008	Priory Meadow Shopping Centre	Part of Hastings week
Field studies	Introduction to Foreshore and Nautical Archaeology - Nautical Archaeology Society	Sunday 31 August 2008	Shipwreck and Coastal Heritage Centre	A one-day course studying the nautical past
Film	Shot by the Sea	“5th July to August 1st 2008	Electric Palace, beach and other venues	
History	Pieces of the Past Lectures: 'Moments Musicaux'	Monday 01 September 2008	Hastings Museum & Art Gallery	Local history lecture
Local produce festival	The Third Hastings Seafood and Wine Festival	Saturday 20 September 2008 - 21 September 2008	Stade and elsewhere	Showcasing local produce
Music	La Boheme - Ellen Kent Opera International	Wednesday 08 October 2008	White Rock Theatre, Hastings	
Music	Town Hall Takeover!	Saturday 13 September 2008	Town Hall, Hastings Town Centre	Local bands
Sports	World Crazy Golf	Saturday 25 October 2008 - 26	Seafront	

Type	Title	Dates	Location	Notes
	Championships 2008	October 2008		
Theatre	A Midsummer Nights Dream	Saturday 13 September 2008 - 20 September 2008	St Leonards Gardens	Open air theatre event
Theatre	An Evening of Clairvoyance with Tony Stockwell	Friday 26 September 2008	White Rock Theatre, Hastings	
Theatre	Fair Maid of the South East	Thursday 04 September 2008 - 05 September 2009	Hastings Castle	Open air theatre event
Theatre	Great Expectations	Wednesday 03 September 2008 - 06 September 2008	Stables Theatre	
Theatre	Roy Chubby Brown	Wednesday 01 October 2008	White Rock Theatre, Hastings	

Source: http://www.visithastings.com/hastings/attractions/default.aspx, other www and personal contact

APPENDIX 5

Cultural Projects Community Impacts

This appendix reviews evidence of community benefits from cultural projects in Hastings and elsewhere.

Vital Currents - Review of Cultural Projects

A review of cultural projects was undertaken by Hastings Borough Council in 2005[89]. This is summarised below.

Coastal Currents

Coastal Currents is an annual four-week contemporary arts festival with an estimated 46,000 visitors (2004). The festival acts as an umbrella for individual commissions, projects and events, and helps nurture local individuals and organisations. The festival has included a film festival *Shot by the Sea*, the *Street Arts Festival*, the *Open Studios Programme* and the *Do It* youth arts programme. The Festival has:

- Improved residents' quality of life
- Enhanced local cultural identity and contributed to the re-imaging of Hastings
- Contributed to community cohesion
- Provided a context for work to support the professional development of the local artistic community and supported the local cultural economy

Creating People-friendly Places

Creating People-friendly Places was an artist's residency project in 2000 that helped the community to consider how it might transform their public spaces, recognising that even subtle interventions might make a big impact on people's lives. Following consultation with residents and traders, artists, children and teachers re-animated Kings Road in St Leonards, and artists created a mural celebrating the 19th century residents independence from the local council. The project has:

- Supported environmental renewal and helped re-establish a positive identity for two areas
- Demonstrated the impact of community collective action
- Established a focus for local events
- Led to the appointment of Hastings' first public art officer
- Nurtured and focussed individuals' creative energies
- Enhanced understanding of the potential for public art to transform places
- Improved social contacts

Big Bruvva Backwards

Big Bruvva Backwards was a 2004 community theatre project that explored the experiences of homeless people in Hastings, using two local community theatre groups. The project:

- Improved the understanding of the needs of homeless people and promoted constructive problem solving amongst homeless people
- Encouraged access to cultural activity in the town centre

[89] Vital Currents - The Arts, Social Inclusion and Community Regeneration, 2005, Hastings Borough Council

- Encouraged the development of social networks and individuals' trust, self-esteem and confidence
- Encouraged local people in local community activities

Headland

Headland was a series of events to reinvigorate Hastings traditions around the town's history and sea-faring identity through local artists and the community, and including the College, fishermen, Coast Guard and local community groups. Many of the participants were from the town's most deprived wards. Over three nights the project drew an audience of over 750 people and one of the legacies is the current *Walking the Fish* festival. The project:

- Supported community cohesion
- Enhanced local cultural identity and contributed to the re-imaging of Hastings
- Supported the local arts sector and increased access to the arts
- Helped establish two new community arts groups
- Enhanced individuals' creative and team building skills, improved social contacts and engaged young people in community activities

Print and Sculpture Project

The Print and Sculpture Project used established artists to work with staff and stroke recovery patients at the Egerton Rehabilitation Unit. The project activities were devised to contribute to the therapy programmes and the project produced public art which remains in the Rehabilitation Unit. The project:

- Extended Rehabilitation Unit staff skills and morale
- Enhanced the Rehabilitation Unit environment and formed the basis for a longer-term patient arts programme
- Improved patient hand-eye co-ordination and healing, as well as patient morale

Torfield School Project

The Torfield School Project was Hastings-based artist-led organisation working with autistic pupils, who had complex needs and a sensitivity to their surroundings. The project allowed the children to modify their environments, and has resulted in a legacy of further work. The project:

- Enhanced the creative teaching skills and the School's educational approaches
- Developed children's skills and demonstrated this to parents and carers

Sticky

The project commissioned an established theatre company to bring a large scale performance piece involving many hundreds of feet of sticky tape to Hastings as part of the 2002 Coastal Currents festival. The performance attracted 5,000 people and the project:

- Was a milestone event in transforming the image of Hastings and developing residents expectations
- Established the role of street arts in helping to regenerate the town centre and assist in reducing crime and
- Developed individuals' creative skills, team working, confidence and aspirations

Stream

Stream is a sea-front public art lighting project in St Leonards that involved the local community through the work of several Hastings-based artists. Stream has:

- Provided a significant environmental improvement
- Proved an effective regeneration consultation mechanism and contributed to the image of Hastings
- Contributed to social cohesion by developing local networks and led to positive thinking about the local environment

Rhythmix

Rhythmix was a 2003 project involving community music groups, with an emphasis on reaching disadvantaged young people. The project used creative music and dance to develop social skills. Rhythmix has:

- Contributed to young people's social cohesion
- Developed links between the youth service and local arts organisations through demonstrating the value of arts-based youth work
- Developed individuals creative and technical skills, and contributed to personal growth, self-confidence and team-working skills
- Engaged disadvantaged young people in structured learning

Seafront Banners

The 2000 Seafront Banners project used a local arts group working with hundreds of Hastings children to create banners on the seafront. The process involved refugees and asylum seekers in Hastings. The project:

- Improved the environment and local pride
- Increased community cohesion and cross-cultural understanding
- Developed individuals creative skills, self-confidence and social skills
- Improved contacts and social networks amongst adult asylum seekers

Creative Dance Project

The 2004 Creative Dance Project used a community dance programme to engage young people from disadvantaged communities in Hastings, many of whom were considered hard to reach or at risk of dropping out of education. The project:

- Broadened local resources for engaging young people and was an effective vehicle for social and issue-based training
- Incentivised individual's school attendance
- Supported practical and creative skills as well as improving self-esteem, communication and team working skills

Creative Commentaries

Creative Partnerships Hastings and East Sussex undertook a review of the impact of a series of projects, some of which are briefly summarised below[90]. The focus of these projects is creativity in education, responding to the key education issues affecting Hastings and demonstrating how culture can be part of the mechanism for addressing these issues.

Learning in the rain

- Improved self confidence in children and group co-operation

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[90] The Casebook - programmes, projects and partnership, Creative Partnerships Hastings and East Sussex

Drama for learning

- Improved children's speaking and listening skills, and a greater responsibility for learning

Scientific investigations

- Impact on pupil's speaking and listening skills

Capturing imaginations

- Improvement in behaviour

Picture that emotion

- Enhanced willingness to engage with others

Children take charge

- Independent confident working by children

Digging deeper

- Engagement in science an better literacy skills
- Collaborative and independent working

Inspiring confident learners

- Student motivation and engagement, including students at risk of exclusion

Giving voice

- Improvement of staff-student relationships and morale in Hillcrest School

Other Examples

Other examples of community impacts have been documented through the Arts Council's Fusion Programme[91]. This programme examined how LSPs can work with the arts to deliver their objectives and noted how arts organisations and artists contribute to social and economic goals:

- Participatory arts organisations encouraging a variety of people to learn together and take action in their communities
- Collaboration between arts organisations and cross-sector partners, such as arts and health organisations supporting health promotion and contributing to therapeutic processes and improved clinical environments
- Amateur /voluntary arts organisations engaging large numbers of people to enrich cultural life, encourage active citizenship and develop individual talents

The examples included a project to reduce the rates of teenage pregnancy and sexually transmitted infection in Blackpool, developing community pride in Burnley, increasing road safety in Cumbria, developing community capacity in Ellesmere Port and improving nutrition and exercise in Preston

[91] Fusion, 2006, Arts Council England

APPENDIX 6

Equalities Baseline Statistics

The table below set out the baseline statistics for the equalities assessment.

Under 18 Conceptions

Under 18 Conceptions

Rates per 1000	Hastings	South East	England
January 2005 to December 2005	60.8	34.1	41.3

Source: ONS 2008

Ethnicity

Ethnic Group	Hastings	South East	England
All Persons	86,100	8,237,800	50,762,900
White	94%	93%	89%
White: British	90%	88%	84%
White: Irish	1%	1%	1%
White: Other White	3%	4%	3%
Mixed	2%	1%	2%
Mixed: White and Black Caribbean	0%	0%	1%
Mixed: White and Black African	0%	0%	0%
Mixed: White and Asian	1%	0%	0%
Mixed: Other Mixed	0%	0%	0%
Asian or Asian British	2%	3%	5%
Asian or Asian British: Indian	1%	2%	2%
Asian or Asian British: Pakistani	0%	1%	2%
Asian or Asian British: Bangladeshi	0%	0%	1%
Asian or Asian British: Other Asian	0%	0%	1%
Black or Black British	2%	1%	3%
Black or Black British: Caribbean	1%	1%	1%
Black or Black British: African	1%	1%	1%
Black or Black British: Other Black	0%	0%	0%
Chinese or Other Ethnic Group	1%	1%	1%
Chinese or Other Ethnic Group: Chinese	0%	1%	1%
Chinese or Other Ethnic Group: Other Ethnic Group	1%	1%	1%

Source: ONS 2008

Age profile

Age	Percentage of population within age group		
	Hastings	South East	England
Aged under 1 year	1%	1%	1%
Aged 1 - 4 years	4%	5%	5%
Aged 5 - 9 years	6%	6%	6%
Aged 10 - 14 years	7%	6%	6%
Aged 15 - 19 years	7%	7%	7%
Aged 20 - 24 years	6%	6%	7%
Aged 25 - 29 years	5%	6%	6%
Aged 30 - 34 years	6%	6%	7%
Aged 35 - 39 years	7%	8%	8%
Aged 40 - 44 years	8%	8%	8%
Aged 45 - 49 years	7%	7%	7%
Aged 50 - 54 years	6%	6%	6%
Aged 55 - 59 years	7%	7%	6%
Aged 60 - 64 years	6%	5%	5%
Aged 65 - 69 years	4%	4%	4%
Aged 70 - 74 years	4%	4%	4%
Aged 75 - 79 years	3%	3%	3%
Aged 80 - 84 years	3%	3%	2%
Aged 85 and over	3%	2%	2%

Source: ONS 2008

Crime

Notifiable offence	Crime offence rate as a proportion of the population		
	Hastings	South East	England
Violence Against the Person	4%	2%	2%
Wounding or Other Act Endangering Life	0%	0%	0%
Other Wounding	1%	1%	1%
Harassment Including Penalty Notices for Disorder	1%	0%	0%
Common Assault	1%	0%	0%
Robbery	0%	0%	0%
Theft from the Person	0%	0%	0%
Criminal Damage Including Arson	3%	2%	2%
Burglary in a Dwelling	1%	0%	1%
Burglary Other than a Dwelling	1%	1%	1%
Theft of a Motor Vehicle	0%	0%	0%
Theft from a Motor Vehicle	1%	1%	1%

Source: Nomis 2008 - Notifiable Offences Recorded by the Police, 2006/2007

Faith

Religion	Percentage of population within each religious group		
	Hastings	South East	England
People stating religion as: Christian	67.39%	72.78%	71.74%
People stating religion as: Buddhist	0.32%	0.28%	0.28%
People stating religion as: Hindu	0.27%	0.56%	1.11%
People stating religion as: Jewish	0.13%	0.24%	0.52%
People stating religion as: Muslim	0.75%	1.36%	3.1%
People stating religion as: Sikh	0.04%	0.47%	0.67%
People stating religion as: Other religions	0.47%	0.36%	0.29%
People stating religion as: No religion	21.36%	16.5%	14.59%
People stating religion as: Religion not stated	9.28%	7.46%	7.69%

Source: ONS - Census 2001

Limiting Long Standing Illness

	Hastings	South East	England
All people - Limiting long term illness*	16,698	1,157,619	8,369,174
All people - Limiting long term illness as a percentage of the population	20%	15%	17%

Source: Source: ONS - Census 2001 * Limiting Long Standing Illness (LLSI): An illness, disability or infirmity that is longstanding (has troubled someone over a period of time or is likely to) and limits their activities in any way. The Census does not assess LLSI in exactly the same way as the GHS, FRS or HSE as it does not pose a two-part question. Instead, it poses the question: 'Do you have any long-term illness, health problem or disability which limits your daily activities or the work you can do? Include problems which are due to old age. (Yes/No)'.

Educational attainment

Key Stage 2 results: Percentage of Pupils achieving Level 4 or above

	English			Maths			Science		
	1997	2007	% points difference	1997	2007	% points difference	1997	2007	% points difference
Hasting and Rye	50	75	25	50	68	18	58	84	26
East Sussex	63	80	17	61	76	15	67	88	21
South East	66	81	15	63	77	14	70	88	18
England	63	80	17	62	77	15	68	88	20

Source: Department for Children, Schools and Families - Statistics

GCSE and equivalent results, percentage of pupils gaining

	Achieving 5+ A* - C			Achieving 5+ A* - G			Any passes		
	1997	2007	% points difference	1997	2007	% points difference	1997	2007	% points difference
Hasting and Rye	36.5	38.6	2.1	84.2	84.5	0.3	89.8	96.8	7
East Sussex	45.5	58.1	12.6	89.3	90.8	1.5	93.5	97.8	4.3
South East	47.7	62	14.3	89.8	92.7	2.9	94.1	98.2	4.1
England	45.1	62.0	16.9	86.4	91.7	5.3	92.3	98.9	6.6

Source: Department for Children, Schools and Families - Statistics

Household formulation - couples

Household formulation - couples

People aged 16 and over living in households:	Hastings	South East	England
Living in a same-sex couple	0.47%	0.33%	0.32%
Living in a couple: Married or re-married	79.02%	83.69%	83.38%
Living in a couple: Cohabiting	20.51%	15.98%	16.29%

Source: Source: ONS - Census 2001.