BARKER
LANGHAM

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SLOUGH BOROUGH COUNCIL
NORTH WEST QUADRANT

Draft Situation Analysis Report

1 FOREWORD

There is no doubt that there is huge potential in Slough to create an exceptional cultural hub. Many projects and agendas are aligning to create a fertile context for an innovative project. This document sets out the key contextual information that influences the shaping of a future project. Key to this is the major investment taking place – and the central role of culture within that development, and the opportunity presented by a growing young and diverse population. There are multiple opportunities, but the emergent context points to the opportunity for a progressive approach that delivers across many agendas – wellbeing, learning, higher education, access to careers, and the development of a new cultural anchor for a place that is becoming a 21st century city, with a 21st century economy. What is clear from this work is that the cultural infrastructure of Slough has many positive elements – but there is a need to make a real step change to meet city scale needs, and align the key stakeholders around some important shared outcomes for the future, with culture and learning at the centre of this.

2 INTRODUCTION

This Situation Analysis is the first output in an Options Appraisal and Outline Business Planning exercise being undertaken by Barker Langham on behalf of Slough Borough Council. The purpose of the Outline Business Plan is to assess the potential of a new building in the North West Quadrant (NWQ) of Slough, meant to provide spaces for the arts and leisure, as part of a highly developed masterplan for the town. Furthermore, this analysis looks to ensure that the project fully reflects the future needs of the district, town and population, as well as communicating a new future for arts and culture for Slough.

This is a working research document, intended to frame the current project context, laying the foundation for further stages of work. It comprises six sections. Each section outlines the response to the data, in the form of observations that could form part of the thinking for the evolution of the project and its brief development.

The Strategic Context section gives a brief overview of both the history and the future perspectives of Slough. Because of its socio-economic evolution, Slough presents several opportunities for further cultural developments. It has already started defining a cultural strategy for the town while supporting urban renewals and transportation developments.

The Physical Context and Issues section details the locational setting, immediate surroundings and accessibility of the North West Quadrant, where the new cultural building will be located. It also provides an overview of the more general current development of Slough.

The Market Assessment section examines the demographic and economic characteristics of Slough to map the future opportunities for the new cultural site. It also establishes some of the key benchmarks for the UK cinema, theatre and other creative industries which will form the basis of the key assumptions in the Business Plan.

The Benchmarking & Comparators section of this report analyses existing cultural venues both in Slough and in Berkshire more widely. This informs our estimations on the appropriateness of activities implementation and spaces allocation, and the realistically achievable users and visitors. It also looks at a wider ‘competitive set’ of comparators from the UK and beyond that exemplify approaches to purpose, vision, audience and space which could be employed to ensure the project delivers best / new practice.

The potential Funding Opportunities section examines other projects or levies in Slough which could be complementary sources of funds, as well as wider opportunities from funding agencies and other sectors.

The Appendices include an in-depth analysis of eight best practice examples among mixed-use cultural venues in aspirational terms both in the UK and abroad, providing an opportunity to reflect on the wider vision for a new cultural ‘hub’ in Slough.

2.1 Source documents

This situation analysis synthesises and interrogates data drawn from a number of documents provided by Slough Borough Council and other project partners. These include:

Cultural

- *A Cultural (Arts) Strategy for Slough* by Slough Borough Council
- *Slough Cultural (Arts) Strategy – Revised* by SBG
- *Becoming a Cultural Compact – Project Proposal Form* by Slough Borough Council

NWQ Development

- *Draft Slough Ahead - TVU Vision Statement* by Slough Urban Renewal
- *North West Quadrant - Pre-Stage 0 Indicative Masterplan* by TP Bennett
- *North West Quadrant, Slough - Strategic Development Brief* by MUSE

Regeneration

- *Centre of Slough Update* by Slough Borough Council
- *Slough Employment and Skills and Inclusive Growth Study - Socioeconomic Evidence Baseline* by Hatch Regeneris
- *Slough Campus - Exploratory Research Paper* by Hatch Regeneris
- *Royal Holloway University TCRG* by the Town Centre Regeneration Group
- *Future High Street Funds Application* by Slough Borough Council
- *An assessment of the availability and role of Innovation Spaces in Berkshire, Report to Thames Valley Berkshire Local Enterprise Partnership* by SQW Ltd.

Supporting research exploring wider contexts has drawn on a variety of additional sources.

2.2 Summary of brief

Slough Borough Council are creating a Masterplan for the 9-acre site North West Quadrant (previously the location for Thames Valley University) for a residential/office led mixed use scheme. Slough BC had stated an interest in attracting the Migration Museum (which now has a home) to Slough as well as creating a permanent home for the Slough Museum.

The scope of the extended work is cultural planning – which allows for the consideration of a range of cultural and creative elements: interpretation, museum, incubation, education, performance, cinema etc. The scope include:

- A holistic review of the 'situation' e.g. demographics, economics, current cultural infrastructure, location, story, historic assets / collections, competitors, best / new practice, and comparators etc, should be synthesised into a clear Direction of Travel report.
- To test a range of options by way of scoring them, using weighted criteria (CAPEX, OPEX, fit with vision, experience, impacts, best fit partners etc).
- Deliver an Outline Business Case and Project Brief (space, experience, vision, operation etc), which can be used to advocate the project, also create a prospectus for a market testing.

3 STRATEGIC CONTEXT

3.1 Statement of Significance for Slough

3.1.1 Early history[1]

The name Slough means "soil" and was first recorded in 1195. From the mid-17th century, stagecoaches began to pass through Slough and Salt Hill, which became locations for the second stage to change horses on the journey out from London. The opening of the Great Western Railway in 1838 saw a branch line completed from Slough to Windsor and Eton Central, opposite Windsor Castle, for Queen Victoria's convenience.

3.1.2 Economic and social expansions[2]

In June 1918, the government bought a large area of agricultural land on the west side of Slough and set up an army motor repair depot. It was used to store and repair huge numbers of motor vehicles coming back from the battlefields of the First World War in Flanders. In April 1920, the Government sold the site and its contents to the Slough Trading Co. Ltd. Repair of ex-army vehicles continued until 1925, when the Slough Trading Company Act was passed, allowing the company (renamed Slough Estates Ltd) to establish an industrial estate.

Spectacular growth and employment ensued, with Slough attracting workers from many parts of the UK and abroad. The Estate created a lot of employment and in the 1930s many people from all over the UK, but especially Wales, came to Slough to work in its industries. After the Second World War, Poles and Ukrainians moved to Slough to work and in 1950/51 workers from the West Indies, India and Pakistan came to the town. Londoners also moved to Slough to work in the 1950s.

In the 21st century, Slough has seen major redevelopment of the town centre.

3.1.3 Slough today

Slough has been and still is known as an industrial town, being second only to London as a UK location for global corporate headquarters. The town is a business and innovation hub and boasts major companies such as Masterfoods (formerly known as Mars), Citroen, Ferrari, Yellow Pages and Amazon.

Slough's success in attracting a large workforce is based around its proximity to Heathrow Airport and the good transportation links to London (both accessible within 15 minutes or less). The half-hourly train services running to London Paddington station will soon be complemented by the Crossrail Elizabeth line that will create direct, door-to-door connections between Slough and the West End of London, the City and Essex.

The town is also increasingly becoming a destination for people looking to move outside of the capital, and it is listed in Knight Frank's top 20 UK destinations for London leavers. Slough's attractiveness to residents is highlighted by the number of new residential schemes that are currently being built in the town. Many of these are close to the railway station and town centre, making them ideal for both people working in Slough and those wishing to commute to the capital or internationally.

3.1.4 Slough's community[3]

Because of the intense migratory waves over the decades, Slough presents an extremely diverse population. Slough communities represent 80 different countries and 150 different languages are spoken in the borough, with half of school pupils not having English as a first language. 39% of the residents were born outside of the UK and one third of the population comes from BAME communities.

Slough is both the youngest city in the UK and the city with the largest under-18 population, two figures that will support its ongoing economic growth. However, the young population does not seem prepared appropriately to sustain the expansion of businesses and meet developing workforce requirements. Slough's young population

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[1] http://www.sloughhistoryonline.org.uk/ixbin/hixclient.exe?a=query&p=slough&f=generic_theme.htm&_IXFIRST_=1&_IXMAXHITS_=1&%3dtheme_record_id=sl-sl-generalhistory&s=Vsr_IEqzq89 access February 2020

[2] Ibid.

[3] https://www.thesun.co.uk/money/7569330/slough-voted-best-place-live-work/

suffers from a deficit in higher education that results in the majority of the population achieving below London and UK average qualifications on each NVQ level 1 to 4. However, Slough Borough Council is very active in providing services to young people, including supporting employment and learning, providing housing options, offering mentoring and providing counselling for mental health issues[4].

- Second only to London as a UK location for global corporate headquarters
- Excellent connectivity to Heathrow Airport and London
- Listed in Knight Frank's top 20 UK destinations for London leavers
- Slough is extremely diverse and the youngest city in the UK

3.2 Slough's Cultural Strategy[5]

Slough aims to become a cultural city. In order to achieve this objective, the Council has been developing a Cultural Strategy for the borough with the intention of supporting regeneration, engaging local communities, reducing inequalities, and improving cohesion, wellbeing, skills and employment.

Currently, Slough presents two main gaps that must be addressed in order to become a successful cultural city. Firstly, Slough lacks clear leadership across cultural and art provision. Leadership is a clear and joint vision which is a central element of success, creating a cohesive approach and beneficial strategic synergies. For instance, the various cultural organizations currently active in the borough could take advantage of shared assets, resources, thinking and forward planning. Secondly, Slough continues to present key gaps in its cultural offer. Slough has, however, delivered recent projects responding to the local population's needs. The Curve and the Ice Arena are two examples of new and high quality cultural and leisure spaces.

Slough Borough Council has recently drafted a list of key opportunities to be taken in order to develop a strong cultural strategy. According to the Council, Slough would benefit from the presence of a Cultural (Arts) Trust, which would be set up as a limited company with a charitable arm. As a starting point, the Trust should gather a full understanding of all the cultural assets in Slough together with a map of the work of 'unseen' artists and all existing arts organizations in the borough, so as to ensure a coordinated approach.

The Trust would set up a long-term, cohesive cultural strategy while working closely with all stakeholders. It would also ensure that culture and arts are embedded in all Council projects and strategies and are embraced as well in developers and planners' spatial and economic growth strategies. The Trust would also ensure that Slough is engaged with the government at the highest level and participates in national programs to drive the benefits of arts and culture. The Trust would also take care of funding strategies. It would be able to access funding sources (including borrowing) that the local authority could not, and it would be a vehicle for the Council to transfer assets to. The Trust should also ensure a fair redistribution of any major funding to local artists and arts companies in Slough whilst ensuring that enough money is invested in new activities and place-based projects.

Slough Borough Council is also considering supporting the development of a cultural quarter – with the North West Quadrant being central to that. This could be created by utilising currently empty shops on Slough High Street or other iconic buildings such as the Horlicks building. These spaces could host studios, start-ups, laboratories and much more and therefore could be used to sustain the creative industries while attracting companies working across film, video, television and music.

Slough Borough Council is also wishing to develop a Public Art Strategy to be included within the emerging Public Realm Strategy for the borough. A Public Art Strategy would improve Slough's reputation and sustain the Council's ambition of Slough becoming an attractive cultural city. In order to renew its image, Slough should build a strong communication strategy along with a cultural strategy and should therefore invest in public relations and marketing.

[4] https://slough.gov.uk/young-people/#
[5] Slough Cultural (Arts) Strategy Revised

- Slough aims to become a cultural city to reduce inequalities and improve cohesion, wellbeing, skills and employment
- There are clear gaps in Slough's cultural strategy which mainly are: defined leadership across cultural and art provision; supporting the attraction and retention of creative industries and the connection with local communities and businesses
- The North West Quadrant could develop into the hub of a new cultural quarter stretching from Slough High Street to the iconic Horlicks building and incorporating The Curve

3.3 Spatial Strategy

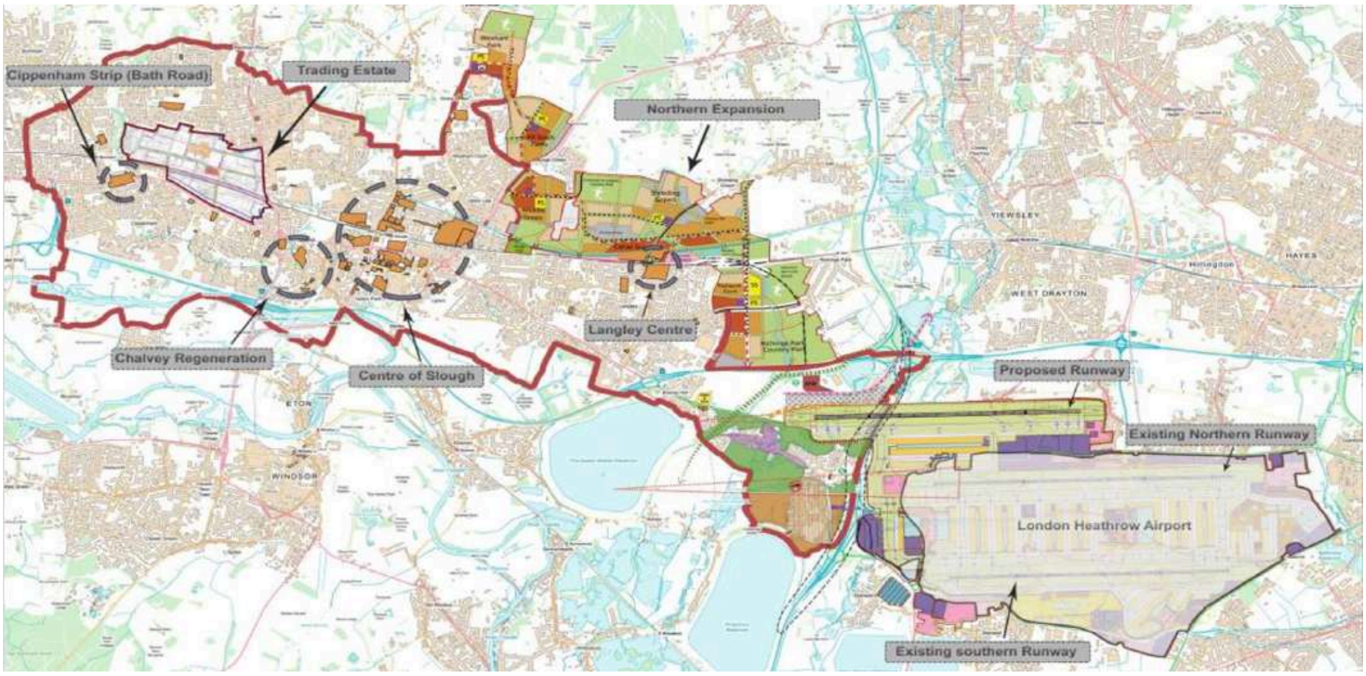
The Council is currently reviewing Slough's Local Plan and preparing a Centre of Slough Development Strategy. The Local Plan review includes development of an emerging preferred Spatial Strategy, as presented to the Planning Committee on 1st November 2017. The overall strategy for the review of the Local Plan is to deliver balanced, cohesive growth which meets local needs as far as possible given all of the constraints to development. In order to achieve this, the Spatial Strategy has the following key elements:

- Delivering major comprehensive redevelopment within the 'centre of Slough'.
- Selecting other key locations for appropriate development.
- Protecting the built and natural environment of Slough including the suburbs.
- Accommodating the proposed third runway at Heathrow and mitigating its impact.
- Promoting the northern expansion of Slough in the form of a 'Garden Suburb'.

The Spatial Strategy includes options for comprehensive redevelopment of the 'centre of Slough' (an area larger than the defined town centre), which retains a core shopping area and central business district in support of the target of providing land for 15,000 new jobs across the borough. More than £3bn of investments are projected for the planned regeneration.

In terms of new homes, the Spatial Strategy seeks to meet housing needs within the borough or as close as possible to where the needs arise within a balanced housing market. In order to achieve this, it is proposed to concentrate high density residential growth in the centre of Slough which is the most accessible location within the Borough. It is also proposed to have a northern expansion of Slough in the form of a 'Garden Suburb' within Green Belt in South Buckinghamshire and to some extent developing in existing urban centres such as Langley. The Northern Expansion will be required due to the limits on the capacity in the centre of Slough and in other existing urban centres - and in order to provide a balanced housing market with a range of properties.

Figure: Overall plan of the Spatial Strategy (2018)



3.3.1 Housing need

The extant Core Strategy covers the 20-year plan period between 2006 and 2026. Core Policy 3 sets out that a minimum of 6,250 new dwellings will be provided in Slough over the plan period, which equates to an average of 313 dwellings per annum. Core Policy 3 states that proposals for new development should not result in the net loss of any existing housing. Slough Borough Council is in the process of preparing a new Local Plan for Slough which covers the 20-year plan period between 2016 and 2036. An Issues and Options document was published in February 2017, which confirms that the objectively assessed housing need for the plan period is 927 dwellings per annum (a total of 18,540 during the 20-plan period). The emerging targets are for the delivery of 20,000 new homes over the plan period in order to ensure this strategic target is achieved and exceeded to allow for additional population increases over the lifetime of the Local Plan.

The spatial distribution of housing within the Core Strategy focuses housing growth within the town centre, where the target is for a minimum of 3,000 dwellings. For major sites in other urban areas, there is a target of 1,350 dwellings.

The Slough Housing Strategy (2017) advises that housing demand is set to increase further with the expansion of Heathrow, the regeneration of the town centre, the introduction of Crossrail offering reduced commuter journey times into central London, and the promise of future fast rail links with Birmingham and the North with HS2. Substantial numbers of new homes are already planned as part of Slough's regeneration, but demand for new housing will also continue to increase due to the growth in employment opportunities and population in the borough. It is important to achieve a balance in the new housing which is provided.

3.3.2 Slough Urban Renewal[6]

Slough Urban Renewal (SUR) is a partnership between Slough Borough Council and Morgan Sindall Investments Limited, which is undertaking a widespread programme of regeneration across the borough. The partnership aims at being a catalyst for change and the regeneration of Slough through commercial development, the building of new homes and enhancement of local amenities. SUR intends to deliver new high-quality and iconic buildings to help improve the image of Slough and its sense of place.

Developments are taking place across Slough, stretching across the full extent of the borough. They include:

- Residential: 1350 residential apartments. The new homes will be for every tenure – affordable, built to rent and for sale.
- Leisure: wet and dry leisure facilities, a new stadium for the town and the refurbishment of the existing Ice Arena.

[6] https://www.slough-thinkingforward.co.uk/developments/

- Hotel and Restaurants: high quality hotel rooms and restaurant facilities both in the town centre and around the revitalised commercial district.
- Office: 200,000sq ft of Grade A commercial office space
- Schools: additional school places within the borough and additional facilities for children

Some of the SUR projects include[7]:

Housing	Community buildings	Leisure	School extensions and new buildings	Commercial
- Milestone, Ledgers Road	- The Curve	- Arbour Park community sports facility	- Claycots, Town Hall site	- Hotels, old library site
- Wexham Green, Wexham Road		- Ice arena	- James Elliman	
- Eschle Court		- New leisure centre, Farnham Road	- St Mary's	
- Upton Road		- Langley Leisure Centre		
- Alpha Street North				

Figure: Development Masterplan

- Slough's Local Plan is under review with the preparation of a Centre of Slough Development Strategy
- Planned construction of 20,000 new residential dwellings increases demand for a cultural offer
- More than £3bn of investments are projected for the planned regeneration.

3.4 Transport Strategy

Slough is situated to the west of London in the Thames Valley, and is one of the most accessible towns in the South East. The borough is 20 miles (32km) west of Charing Cross, central London; 2 miles (3km) north of Windsor; 5 miles (8km) east of Maidenhead; 11 miles (18km) south-east of High Wycombe; 17 miles (27km) north-east of the county town of Reading.

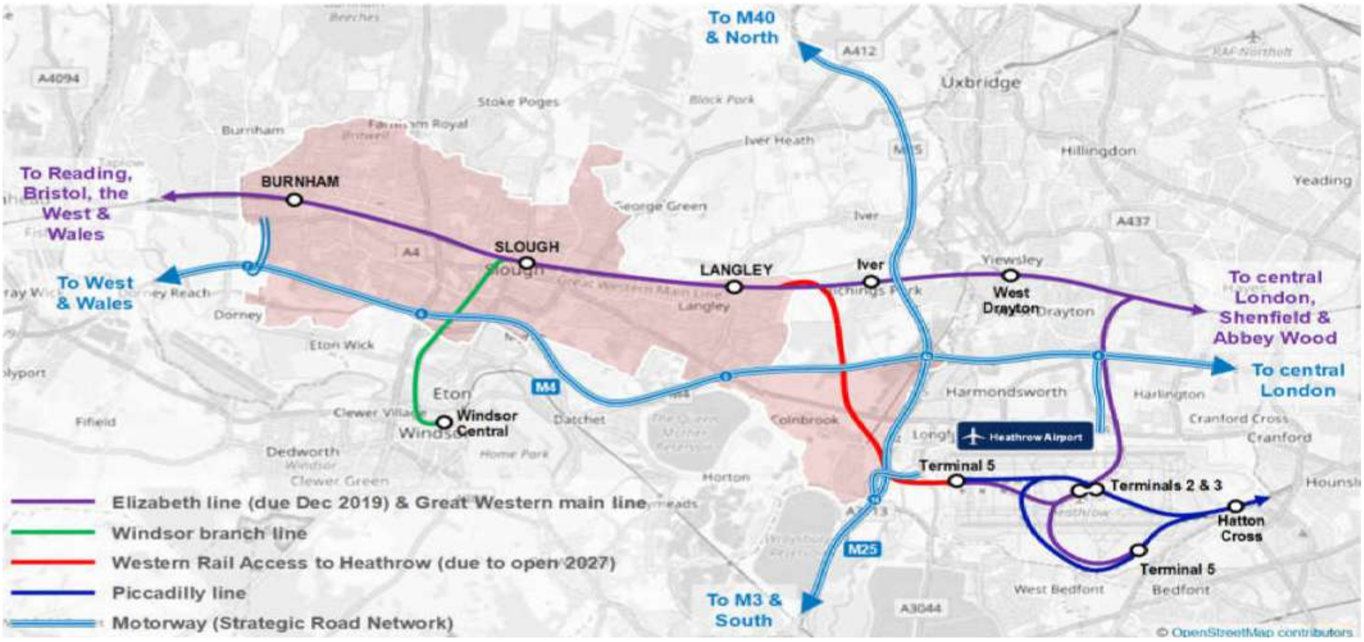
In early 2018, Slough Borough Council's Executive Member for Planning and Transport requested that work commence on a new transport-led vision for the centre of Slough which could guide development and regeneration to 2040 and beyond. As part of the Centre of Slough Development Strategy and the Local Plan, the transport vision seeks to maximise the improvements in strategic connectivity to support and enable redevelopment of the centre of Slough, improving opportunity for those living in the Borough, and making Slough a more attractive place to live, work, rest and stay. The draft Transport Strategy for the borough, prepared in support of the Local Plan Issues and Options Consultation, has been an important consideration in developing the centre of Slough transport vision. Phased delivery of the components of the vision will provide the public

[7] http://www.slough.gov.uk/business/regenerating-slough/slough-urban-renewal.aspx

transport connectivity and capacity critical to ensuring that Slough is able to take full advantage of the anticipated growth in jobs and homes; and to achieve the objectives of the Local Plan including revitalising the centre of Slough as a commercial, leisure and retail centre.

The transport vision seeks to deal with the problems of congestion through a significant reduction in traffic volumes in parts of the centre of Slough. This would bring benefits in terms of local air quality, road safety and the quality of the urban realm. Improved journey times for buses and more space for pedestrians and cyclists would also result.

Figure: Strategic connectivity improvements



The Transport Vision includes the key following developments[8]:

3.4.1 Crossrail - Elizabeth Line

The works on the Elizabeth line are a part of the Crossrail programme and include 9 new stations – Paddington, Bond Street, Tottenham Court Road, Farringdon, Liverpool Street, Whitechapel, Canary Wharf, Custom House and Woolwich. The Elizabeth line upgrade will also include full services from Reading and Heathrow in the west to Abbey Wood and Shenfield in the east.

The opening of a station in Slough as part of the Elizabeth line will offer faster, more frequent journeys, and more capacity, including direct services to central London, with journey times to Bond Street expected to be 31 minutes, 38 minutes to Liverpool St and 46 minutes to Canary Wharf. Four trains an hour in both directions will serve Slough station and two additional trains an hour will call at Slough station at peak times.[9]

Unfortunately, the works have been severely delayed for about one year and the new line in its central section (stations in London) is planned to be opened in 2021. Shortly after this first opening, the works of the full services across the line will commence.[10]

3.4.2 Western Rail Link

The Western Rail Link to Heathrow (WRLtH) is a new direct rail link between Reading, Slough and Heathrow via Maidenhead and Twyford alternately. The short 5.5km rail link will leave the Great Western Mainline between Langley and Iver before entering a new tunnel to join the existing rail line at Heathrow Terminal 5.
The council is working closely with Thames Valley Berkshire Local Enterprise Partnership (TVB LEP) and industry partners, through the WRLtH Stakeholder Steering Group, to promote the scheme and support the delivery of the rail link, which will be operational by early 2024.

[8] http://www.slough.gov.uk/moderngov/documents/s55135/Appendix%20A%20-%20Transport%20Vision%20Supplementary.pdf
[9] http://www.crossrail.co.uk/route/western-section/slough-station
[10] http://www.crossrail.co.uk/news/articles/update-on-progress-to-complete-the-elizabeth-line-1

The new Western Rail Link will bring several benefits:

- Reduce rail journey times between Reading and Heathrow by delivering a new, faster, frequent, more reliable direct train service to Heathrow with four trains per hour in each direction. All trains would call at Reading and Slough and alternate trains at Twyford and Maidenhead. Journey times could be as short as 26 minutes from Reading and 6 to 7 minutes from Slough
- Significantly improve rail connectivity to Heathrow from the Thames Valley, South Coast, South West, South Wales and West Midlands
- Provide an alternative form of transport for passengers and the large number of people who work at the airport who are currently travelling by road
- Ease congestion on roads, including the M4, M3 and M25 resulting in lower CO2 emissions equivalent to approximately 30 million road miles per year
- Generate economic growth and new jobs across the Thames Valley and surrounding areas

The new Western Rail Link is an opportunity to further boost the strategic position of Slough. Slough station has a significant level of usage and is ranked 88 among 2,566 stations in Great Britain. The station registered 5,640,278 entries and exits and 1,732,888 interchanges between 2018 and 2019.[11]

Figure: Western Rail Link to Heathrow

3.4.3 Other services

Major changes to the Strategic Road Network and local road network in Slough are also planned. These include:

3.4.3.1 Extension of the Slough Mass Rapid Transit (SMaRT) scheme[12]

The SMaRT scheme aims at delivering a dedicated bus lane and enhanced bus services along the A4 corridor between Junction 5, Slough town centre and Slough Trading Estate to the west. This runs roughly parallel to the route of the M4 and provides commuters with increased opportunity to switch from cars to public transport along this important east-west corridor. Phase 2 of the SMaRT scheme will continue SMaRT from Junction 5 to Heathrow to provide a fast, attractive public transport link between Slough and the airport.

3.4.3.2 Smart Motorway Scheme[13]

The M4 is a vital and strategic route between London, the west of England and Wales. The M4 forms a vital part of our road network, linking London to Wales. As well as London, other Urban areas in the region, including Reading, Maidenhead, Windsor, Slough and Hayes rely on it as well as other transport hubs and tourist attractions, for example Heathrow Airport. The M4 connects people, communities and businesses, carrying on average 130,000 vehicles per day, and is prone to congestion.

[11] https://dataportal.orr.gov.uk/statistics/usage/estimates-of-station-usage/
[12] Local Impact Report for Slough Borough Council (2015)
[13] http://assets.highwaysengland.co.uk/roads/road-projects/m4-junctions-3-12-managed-motorway/M4+J3-12+Upgrade+to+smart+motorway+-+Summer+2019+newsletter-compressed.pdf

Highways England is improving the M4 between junction 3 at Hayes and junction 12 at Theale by upgrading it to a smart motorway. The project aims at providing 32 miles of new smart motorway by Spring 2022. Once completed, this will relieve congestion and is intended to improve safety and resilience on the M4. This should take pressure off the A4 through Slough, which is the official diversionary route when there are incidents on the M4.

Figure: Smart Motorway Scheme Map[14]

Smart motorways are a technology-driven approach to the use of motorways. Some of the key features include:

- Speed limits: speed limits will be clearly displayed on overhead gantries and roadside signs to smooth traffic flows
- Signs: signs will be used to inform drivers of conditions on the network and when variable speed limits are in place
- Hard shoulder: the hard shoulder is an extra lane that can be used as a traffic lane when needed. On the M4, the hard shoulder will be permanently converted into a traffic lane so that all lanes will be running
- Emergency areas: there will be highly visible emergency areas at approximately 2.5km intervals
- Emergency telephone: there will be an emergency telephone in each emergency area that will connect people to Highways England's Regional Control Centres and will pinpoint the current location

The development of smart motorways is mainly aimed at increasing capacity and relieving congestion. About 200 miles of motorway in Britain have been already converted to 'smart running', where the hard shoulder is used as an extra lane when motorists are instructed by electronic signs on overhead gantries. However, many motorists report feeling unsafe, with far more breakdowns ending up with cars trapped in live lanes of fast-moving traffic. The AA motoring organisation, which has led calls to scrap or alter smart motorways, issued a poll showing just 9% of drivers felt relaxed or safe when using them[15].

Britain's network of smart motorways – where drivers can use the hard shoulder – is being urgently reviewed by the government. It was discovered that, after being converted into a smart motorway, the M25 London ring road alone reported 20 times more near-misses: in a five year period before one section of the M25 was converted into a smart motorway there were just 72 near-misses, while in the five years after conversion there were 1,485 dangerous incidents[16].

14 http://www.slough.gov.uk/downloads/Smart-motorway-presentation.pdf
15 https://www.theguardian.com/politics/2020/jan/26/uks-smart-motorways-to-be-reviewed-after-increase-in-near-misses
16 https://www.theguardian.com/politics/2020/jan/26/uks-smart-motorways-to-be-reviewed-after-increase-in-near-misses

Therefore, a national rollout of smart motorways has been put on hold by the Transport Secretary. Nonetheless, while work will stop on several schemes that were due to finish this year, sections of smart motorway that are already in use – including on the M1, M4, M6 and M62 – will remain open. Therefore, the development of the road networks for Slough will not be disrupted[17].

3.4.3.3 Windsor Branch Line Services

The Slough-Windsor branch railway is an important link between the two towns and provides essential connections with First Great Western Main Line services to London and Reading. Slough Borough Council notes that widening works on the railway bridge are programmed to take 27 months but is uncertain about the impact on rail services on the branch line and on Network Rail's plans for electrification.

- Slough is one of the most accessible towns in the South East.
- Work has commenced on a new transport-led vision for the centre of Slough to 2040 and beyond with the aim to
- maximise the improvements in strategic connectivity to support and enable redevelopment of the centre of Slough
- improve opportunity for those living in the Borough
- make Slough a more attractive place to live, work, rest and stay
- The opening of the Elizabeth line will offer faster, more frequent journeys and more capacity, including direct services to central London
- Western Rail Link to Heathrow (WRLtH) is a new direct rail link between Reading, Slough and Heathrow
- Improvement will be proposed to public transport and create more space for pedestrians and cyclists

3.5 Analysis & Conclusion

Slough Borough Council has already started to define foundational strategies to boost the town's development. Cultural strategy, urban renewal and transport plans all point to enhance Slough's growth. The town also has a strong corporate representation that is projected to increase further.

Considering the above strategies and projections, Slough is transforming into a small city. However, there are still big needs around skills gaps and the ability to address young people, which seems to be one of the defining issues alongside cultural diversity.

[17] https://www.theguardian.com/politics/2020/jan/30/rollout-of-smart-motorways-put-on-hold-amid-safety-concerns

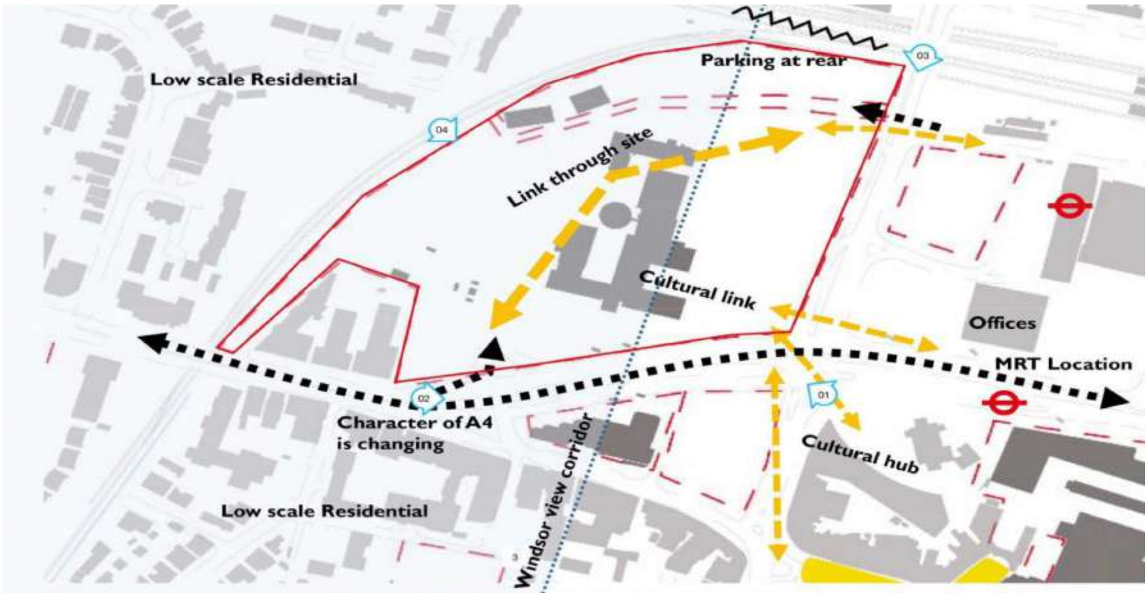
4 PHYSICAL CONTEXT AND ISSUES

4.1 North West Quadrant Development

4.1.1 The site[18]

The North West Quadrant site is a 9 ‐ acre brownfield which sits to the west of the busy intersection between the Bath Road / A4 and William Street. This forms a noisy buffer to the south and east, however to the north and west the Windsor and Eton Rail link and leafy embankments bound the site. High-speed trains pass further to the north. The site's proximity to the centre of the town means there is excellent potential to form new connections through the site and from the south east corner and to the station via Brunel Way (200 metres distance from Slough rail station). The Quadrant is near other relevant and populated sites such as The Curve (the new cultural community venue of the town) and the new Moxy Hotel (a Marriot Brand hotel) on the opposite side of Wellington Street. The site has the potential to expand by incorporating land to the north currently owned by Network Rail. This land includes a Depot, requiring low loader access from the east under the road bridge. The ground level of the site is approximately 3.5m lower than the NWQ site.

Figure: NWQ location and accessibility



The site is currently relatively open in character, not overshadowed, and contains former education buildings in various states of disrepair. In its south west corner is the Keypoint office building, which forms a frontage to the Bath Road for redevelopment of the site to connect with. The western part of the NWQ site forms a backdrop to Windsor Castle as viewed from The Long Walk, which requires sensitive design along the skyline.

The site comprises three land parcels, all of which are owned and controlled by Slough Borough Council. The main site is known as the Thames Valley University (TVU) site, formally a university campus which was acquired, with the assistance of SUR, in 2017. The Council already owned the freehold of the two other sites, one of which is vacant (although the Council is currently using it for temporary car parking as a meanwhile use) and the other is occupied under a short ‐ term lease by the Grove Academy, a primary school. The Council has recently completed the demolition of the old vacant university buildings.

4.1.2 The regeneration[19]

The NWQ regeneration project falls under the Slough Urban Renewal (SUR) Partnership. A special joint venture partnership, known as North West Quadrant LLP (NWQ LLP), has been created under the SUR umbrella to deliver the project. The regeneration opportunity presents an estimated Gross Development Value of £650 million.
The main objectives for the North West Quadrant are as follows:

[18] Appendix 1 - Indicative Master Plan Options Study - TP Bennett
[19] Slough Urban Renewal - Slough Ahead, TVU Vision Statement

- To regenerate a key brownfield site in the heart of Slough, to create an aspirational, sustainable and high‐quality mixed‐use extension to the town centre that will stand the test of time for generations to come
- To be a commercially viable development project that meets the partners' required returns on investment and delivers SBC's minimum land values
- To contribute a significant amount of affordable housing, helping to meet the needs of the local community. The target is to deliver policy compliant (35%) affordable housing
- To be a catalyst for Slough's Transport Vision, including facilitating the proposed Mass Rapid Transport route
- To help facilitate the future development of the adjacent Network Rail site.

According to the key objectives, the vision for the NWQ site proposes to deliver[20]:

- Residential accommodation: a total of 1,371 residents will be split between 75% (1,035) private residents - for sale or to rent - and 25% (336) affordable residents.
- Two office buildings: the construction of the 337,900 ft2 office space will be divided into three different phases (phase 1: 108,000 ft2 + phase 2: 152,900 ft2 + phase 3: 117,000 ft2)
- A vibrant retail and leisure space
- A major new cultural building for a potential museum and education: a total 150,000 ft2 including 100,000 ft2 for Arts Centre / Museum space and 50,000 ft2 for education space (subject to cultural strategy). The cultural and education space are Community Facilities and therefore will be funded separately
- Commercial parking spaces
- Residential parking spaces

4.1.2.1 Residential

1. Private rented sector (PRS) / build to rent (BTR)

The PRS remains undersupplied across the country, resulting in investors increasingly looking at well connected, regional locations offering more affordable accommodation for those needing to look beyond London. The opening of Crossrail in 2019, combined with a high-quality design, extensive public realm and retail / leisure amenities within SUR will be attractive to both occupiers and investors. This, combined with a lack of institutionally managed PRS in the area, will result in a premium rent being achieved on the development.

Existing rents in Slough range from £775 - £1,450 pcm. Because the growth of private renters in Slough has continued to outperform the region and people working in Slough have been receiving higher than average salaries, there is a gap in the market for a high quality, institutionally managed product. Therefore, the new open market rents are anticipated to be achieved across the site from £900 - £1,600 pcm in the first phase. Rental growth (c. 3% per annum since 2006) combined with place-making, local amenities and public realm will help grow rents throughout future phases.

Discounted Market Rent (DMR) may be considered by the Council in lieu of affordable housing. Rents for the DMR are likely to be capped at 80% of Market Rent (before the premium for the PRS has been applied). This will be beneficial to the scheme, enabling the development to attract a wider range of occupiers at different price points. Based on the current master plan of the site, approximately 264 PRS units and a further 206 DMR units will be provided across four blocks in Phase 1.

Given the proximity of the site to the station, a lower provision of car parking will be required in respect of the PRS and DMR (0.47 and 0.24 respectively).

[20] North West Quadrant, Slough, Strategic Development Brief - 3 January 2020

2. Private for sale

Purchasers are gradually being priced out of London boroughs and consequently looking for properties in well-connected regional hubs. The combination of faster travel times to London's West End via Crossrail and numerous leisure / retail amenities within the development itself will help market Slough as a preferable option to other commuter towns within the M25.

Because the current supply of new build stock within the area is limited, TVU represents the only central development site at scale offering a high quality, mixed-use development that will act as a gateway to the town. This will enable TVU to achieve a premium over existing stock and continue to act as a catalyst for growth in Slough.

Research by Glassdoor, one of the world's biggest job search sites, found that Slough offers the best combination of affordability and employment opportunity in the UK. The provision of commercial uses within the TVU development will build on the success of Slough as an employment hub and create a vibrant place where people choose to live, work and play.

Phase 1 of TVU is currently anticipated to include 714 units, arranged across six blocks. Savills advice is based on 244 units across two blocks (D & E) as private for sale apartments. These individual blocks benefit from overlooking the public square and unrestricted views to the north and are screened from the railway tracks and road by other tenure blocks. This arrangement and phasing also offers an ideal lot size for the majority of housebuilders / developers (providing c. 2 years supply) and limits the impact of works on the public realm and basement parking for the commercial element of the scheme.

There are a limited number of new build schemes in Slough. Achieved values vary significantly across sites, with the majority achieving £440 - £600psf. Those at the upper end tend to be PD schemes, offering much smaller units than new build developments. Given the close proximity to the station, the new TVU buildings' values will be likely to achieve a considerable premium above the local embedded market. The current master plan foresees a blended average of £540 per sq ft to be achieved on the first phase based on the current proposed mix and size of units.

4.1.2.2 Offices

Table: Thames Valley office overview

Office space	over 8.7million sq ft of which 52% is Grade A space
Office market	3 distinct areas: The Station Quarter - Town Centre - Bath Road
Office space leased in 2016	1,604,753 sq ft
Office space leased in Q1 2017	425,352 sq ft
Total supply of new office space under construction	1.1 million ft2
Vacancy rate is 7.7%	7.7%

Table: Slough Office Overview

Current office supply	933,000 ft2
Take Up 2016	119,503 ft2
Highest achieved rent (Porter Building)	£34 per ft2
Highest quoting rent	£36 per ft2

Slough's improving position is both underlined by the tone of quoting rents and evidenced by significant increases in rents achieved. The latest letting to Fiserv at The Porter Building was achieved at £34.00 per sq ft, some 20% above the previous rental high for the town. The current levels of Grade A product in Slough will help to drive rents higher in a town that has been characterised by a lack of Grade A space over the past 5 years. Quoting rents for the new office space being delivered ranges between £33.00 - £36.50 per sq ft.

4.1.2.3 Retail and leisure spaces

The NWQ development includes the provision of commercial units at the ground floor level of the buildings for a total of 34,600 ft2. The primary objective is to provide residents and office workers with a high-quality and attractive public realm.

Potential tenants might include the following uses:

- Crèche: 5,000 - 6,000 sq ft with 2,500 sq ft of dedicated outside space. They will also require an easily accessible drop off area for parents and a limited amount of staff car parking
- Gym: 5,000 – 8,000 sq ft. Slough has surprisingly few gyms given the size of the town. In any event, given the scale of this development and its proximity to the station, there will be demand from the small, more community-focused operators
- Delicatessen: the quality of any offer will correlate to other uses and the relative affluence of the residents. This type of use might be as little as 500 sq ft or as much as 5,000 sq ft
- Café
- Restaurants
- Bars
- Micro-brewery
- Leisure spaces
- PCT and medical facilities

- Excellent location in close proximity to High Street, rail and bus station and The Curve
- NWQ will be a catalyst for Slough's Transport Vision, including facilitating the proposed Mass Rapid Transport route and overcoming challenges with Wellington Street being a major barrier to a safe and pleasant walk
- The regeneration opportunity presents an estimated Gross Development Value of £650 million
- The plan includes a major new cultural building totalling 150,000 ft2 for an arts centre / museum space and education space
- The new cultural centre can help improve public space in the development

4.2 Analysis & Conclusion

In the light of a holistic analysis of Slough urban regeneration, the North-West Quadrant is an excellent site to build a new multi-functional cultural centre.

The building would highly benefit from the Quadrant's proximity to Slough high street, new hotels, and the rail and bus station while also being embedded in the new developing transportation network. As a result, the building will be very accessible, permeable and will be able to integrate with the rest of the town. At the same time, it would work as an anchor for the quadrant and the town.

The proximity of the North-West Quadrant to The Curve represents a very strong opportunity. The area where the new cultural building will be situated could be seen as an 'extension' of The Curve (and the High Street) and therefore bring the possibility of a complementary next phase that elevates the cultural offer while enabling the creation of a cultural quarter.

5 MARKET ASSESSMENT

Baseline socio-economic conditions have been assessed by an analysis of a wide range of indicators. The data used throughout this assessment has been mostly taken from the last NOMIS report released in 2018[21]. Such a report provides comprehensive data at local, district, regional and national levels so as to enable a comparison across special scales.

5.1 Demographic analysis

5.1.1 Latest Year Population Update

Table: Total Population

	Slough	South-East	London	Great Britain
All people	149,100	9,133,600	8,908,100	64,553,900
Males	75,300	4,500,300	4,448,900	31,864,000
Females	73,800	4,633,300	4,459,200	32,689,900

5.1.2 Age distribution

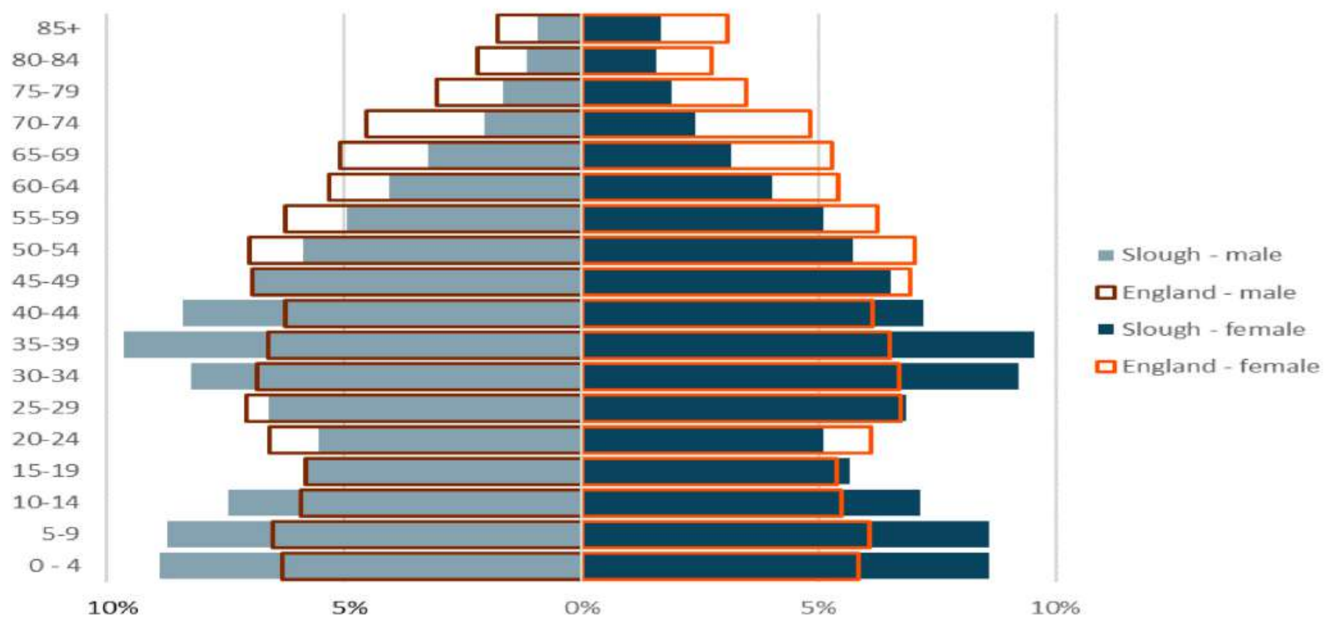
Slough is the UK town with the youngest population, with an average age of 33.9 and only one in 10 people aged 65 and over. Slough's young population mainly derives from the town having the highest birth rates of all UK cities - 16.6 births for every 1,000 residents, compared to the British average of 11.8 - and from the young migrant populations[22].

The detailed demographic profile of Slough's residential population shows variations in the age structure compared to national levels:

Slough has a higher proportion of children under the age of 14

- Slough has proportionately fewer older people across all five-year age groups (both male and female)
- The population pyramid shows that the distribution of males and females in Slough's population roughly aligns with the national picture, relative to the different age groups.

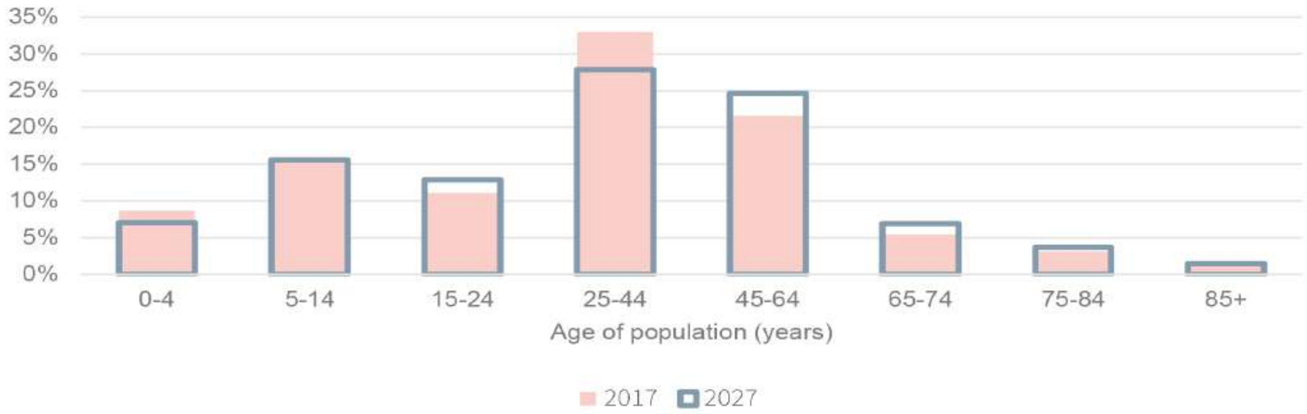
Figure: Population Structure in Slough by Age, 2017



[21] https://www.nomisweb.co.uk/reports/lmp/la/1946157286/report.aspx?#ps
[22] https://www.bbc.co.uk/news/uk-43316697

The proportion of the population who were of working age (between 16 and 64 years) in Slough in 2018 was 63.8%. This was lower than the average for London (67.5%) but higher than the average for Great Britain (62.7%). The demographic change expectation in Slough is unique to the area. While the ageing population is forecast to grow in line with national trends, there will also be higher than average growth in the young population.

Figure: Population Projections in Slough by Age 2017-2027 (Hatch Regeneris, 2019)



5.1.3 Population trends over time

The population of Slough has increased 48% during the period 1981 to 2018, displaying a significantly higher increasing trend compared to London, which experienced a 31% rise over the same period, as well as compared to Great Britain, which had population growth of 18%.

Table: Population Trends Over the Last 30 Years

Years	Slough	South-East	London	Great Britain
1981	100,700	7,243,100	6,805,000	54,814,500
1985	102,800	7,413,700	6,767,000	54,988,600
1990	106,100	7,598,100	6,798,800	55,641,900
1995	112,900	7,763,000	6,913,100	56,375,700
2000	119,700	7,990,600	7,236,700	57,203,100
2005	122,900	8,202,900	7,519,000	58,685,500
2010	137,800	8,577,800	8,061,500	60,954,600
2015	146,000	8,949,400	8,666,900	63,258,400
2018	149,100	9,133,600	8,908,100	64,553,900

5.1.4 Population projection

The population of Slough in 2030 is expected to be 157,400. This is an increase of 5,500 people (3.6% increase) over the current 2020 population estimate of 151,900 people. By 2040, the population of Slough is projected to increase to 161,400 residents. This would be an increase of 9,500 people from the 2020 population, equating to a 6.3% increase over the 20-year period.

The population increase in Slough by 2040 showcase a lower increasing trend than the projected population especially in London, due to a negative migration net trend. By 2040, the population of London will increase by 12.6% from the 2020 population. The population of England is projected to increase by 8.8% over the same period.

Table: Population Trend Projection Over the Next 25 Years

Years	Slough	South-East	London	England
2020	151,900	9,274,900	9,142,000	56,704,700
2025	155,300	9,553,100	9,484,600	58,224,900
2030	157,400	9,796,100	9,767,600	59,548,800
2035	159,200	10,004,700	10,036,700	60,691,400
2040	161,400	10,197,400	10,295,800	61,743,700

5.1.5 Diversity

Slough is also one of the most ethnically diverse local authorities in the country, with a large proportion of its citizens born outside of the UK and with its communities representing 80 different countries. According to the 2011 Census 39% of Slough's population were non-UK born[23]. One third of the 149,100 population comes from BAME communities. 50% of pupils in Slough schools do not have English as a first language.

Table: Population structure by ethnic group in 2011

	Slough	South East	England
White	45.7%	80.0%	85.0%
White British	34.5%	85.2%	79.8%
White Irish	1.1%	0.9%	1.0%
Gypsy or Irish Traveller	0.2%	0.2%	0.1%
Other White	9.9%	4.4%	4.6%
Mixed Race	3.4%	3.0%	2.0%
White and Black Caribbean	1.2%	0.5%	0.8%
White and Black African	0.4%	0.3%	0.3%
White and Asian	1.0%	0.7%	0.6%
Other mixed	0.8%	0.5%	0.5%
Asian	39.7%	13.0%	8.0%
Pakistani	17.7%	1.1%	2.1%
Indian	15.6%	1.8%	2.6%
Bangladeshi	0.4%	0.3%	0.8%
Chinese	0.6%	0.6%	0.7%
Other Asian	5.4%	1.4%	1.5%
Black	8.6%	4.0%	4.0%
African	5.4%	1.0%	1.8%
Caribbean	2.2%	0.4%	1.1%
Other Black	1.0%	0.2%	0.5%
Other Ethnic Groups	2.7%	1.0%	1.0%
Arab	2.0%	0.2%	0.4%
Other	0.7%	0.4%	0.6%

In terms of religion, Slough is one of the most diverse areas in the UK. 10.6% of its residents are Sikhs, the single highest concentration of this faith group in the country. Slough also has the seventh highest concentration of Muslims (23.3%) and the tenth highest concentration of Hindus (6.2%) in the country.

Migration Patterns

In 2018, the internal migration inflow (people moving into Slough from elsewhere in Great Britain) was 6,400, whilst the internal migration outflow (people moving out of Slough to elsewhere in Great Britain) was 7,600.

[23] https://migrationobservatory.ox.ac.uk/resources/briefings/south-east-census-profile/

Table: Projection Components of Change (2018)

	Slough	South-East	London	England
Population	149,900	9,152,700	8,965,600	55,997,700
Natural Change	1,600	20,800	79,400	173,100
Births	2,400	101,600	128,800	661,300
Deaths	-800	-80,800	-49,400	-488,200
All Migration Net	-500	41,400	16,400	193,000
Internal Migration In	6,400	232,300	194,800	0,0
Internal Migration Out	-7,600	-210,400	-265,200	0,0
International Migration In	1,800	67,000	186,900	497,500
International Migration Out	-1,000	-44,800	-100,500	-296,500
Cross-border Migration In	200	14,100	14,100	99,600
Cross-border Migration Out	-300	-16,900	-13,600	-107,600
Other	0	300	200	3,000

5.1.6 Education[24]

The following tables show the level of performance of schools in Slough per level of education in comparison with the national levels of performance. Slough scores high levels both in primary and secondary education, however student performance decreases at A level, where scores are lower than national standards.

Table: Primary Performance 2019

Location	Number of pupils at the end of key stage 2	% of pupils meeting expected standard	% of pupils achieving at a higher standard	Average score in reading	Average score in maths
Slough	2,361	69%	14%	105	107
England - state-funded schools	664,774	65%	11%	104	105

Table: Secondary Performance 2019

Location	Number of pupils at end of key stage 4	Progress 8 score & description	Entering EBacc	Staying in education or entering employment (2017 leavers)	Grade 5 or above in English & maths GCSEs	Attainment 8 score	EBacc average point score
Slough	1,855	Above average 0.29	47.4%	96% (1,578 of 1,648 pupils)	56.9%	53.3%	5
England - state-funded schools	542,831	-0.03	40.0%	94% (495,433 of 528,139 pupils)	43.0%	46.0%	4

Table: 16 to 18 performance 2019

Location	Number of students with an A level exam entry	Achieving AAB or highest in at least 2 facilitating subjects	Grade and points for a student's best 3 A level
Slough	247.994	14.1%	C+ 32.89
England - state-funded schools	283.532	16.5%	C+ 33.96

24 https://www.compare-school-performance.service.gov.uk/schools-by-type?step=default&table=schools&region=871&la-name=slough&geographic=la&for=primary

Overall, Slough's population presents low levels in terms of qualification / attainment. This probably is derived from the lack of university programs offered in the town.

Table: Qualifications (Jan 2018-Dec 2018)

	Slough (%)	South East (%)	London (%)	Great Britain (%)
NVQ4 And Above	41.9	42.2	53.1	39.3
NVQ3 And Above	55.5	61.8	66.3	57.8
NVQ2 And Above	70.2	78.9	78.0	74.9
NVQ1 And Above	78.4	89.2	84.8	85.4
Other Qualifications	13.9	5.2	8.5	6.8
No Qualifications	7.7	5.6	6.6	7.8

Source: ONS annual population survey

Notes: For an explanation of the qualification levels see the definitions section.

Numbers and % are for those of aged 16-64

% is a proportion of resident population of area aged 16-64

5.1.7 Deprivation

The Index of Multiple Deprivation (IMD) 2019 combines information from the seven domains to produce an overall relative measure of deprivation. The domains are combined using the following weights: Income Deprivation (22.5%), Employment Deprivation (22.5%), Education, Skills and Training Deprivation (13.5%), Health Deprivation and Disability (13.5%), Crime (9.3%), Barriers to Housing and Services (9.3%), Living Environment Deprivation (9.3%). The weights have been derived from consideration of the academic literature on poverty and deprivation, as well as consideration of the levels of robustness of the indicators.[25]

Overall, Slough Borough Council is the most deprived of the six boroughs in Berkshire with levels of deprivation akin to those of some London boroughs. Slough has an IMD rank of 79 (out of 326 local authorities nationally) and therefore the highest levels of deprivation in the Thames Valley LEP area. The borough also falls within the top 25% most deprived local authorities in England.

An analysis of the factors which determine deprivation shows that:

- Slough has the highest rank scores in: Crime (16th), Income Deprivation Affecting Older People (27th), and Barriers to Housing and Services (38th). For instance, in 2016 there were 4,136 violent crimes in Slough, the second highest figure since 2010. One of the key reasons for such a rise is the increase of domestic-related crimes. In 2016 there were 4,895 domestic abuse incidents in Slough, 1,686 of which were crimes[26].
- Slough has the lowest rank score in: Health (142nd), Employment (164th), and Education Skills and Training (138th). However, Slough has the highest decile for education deprivation (138th) in the Thames Valley LEP area and falls within the top half of local authorities nationally.

Nonetheless, Slough's deprivation level, currently 79th, has seen a relative improvement over the past decade. In 2015, Slough was ranked 78th out of the 326 local authorities nationally (where a ranking of 1 is the most deprived), while in 2010 it was ranked 69th.[27]

[25] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/835115/IoD2019_Statistical_Release.pdf

[26] http://www.slough.gov.uk/downloads/Demographics.pdf

[27] http://www.slough.gov.uk/council/joint-strategic-needs-assessment/deprivation.aspx

- Slough is the UK town with the youngest population, with an average age of 33.9, due to the town having the highest birth rates of all UK cities and its young migrant populations
- One of the most ethnically diverse local authorities in the country
- Slough's primary and secondary school students outperform the England average
- Slough's population presents low levels of qualifications. This probably derives in part from the lack of university programs offered in the town
- The borough falls within the top 25% most deprived local authorities in England, scoring highly in Crime, Income Deprivation and Barriers to Housing and Services.
- Relative improvement in the deprivation level is apparent in each of the last two measurements

5.2 Business analysis

5.2.1 UK Competitiveness Index 2019 (UKCI)[28]

The UKCI provides a benchmarking of the competitiveness of the UK's localities, and it has been designed to be an integrated measure of competitiveness focusing on both the development and sustainability of businesses and the economic welfare of individuals. The 3-Factor model for measuring competitiveness consists of a linear framework for analysing competitiveness based on: (1) input; (2) output; and (3) outcome factors. An index is calculated with a UK average base of 100 with a score for each particular locality. The score for each locality can then be a ranked order list of all localities. Localities in London are the top nine most competitive places in Britain and only London and South East of England achieve competitiveness levels above the UK average. Thames Valley Berkshire is ranked second out of 44 English Local Enterprise Partnerships. Slough is ranked 17 out of the 67 localities in the South East and 39 out of the total 379 localities in the UK.

5.2.2 Employment and unemployment rates

Slough has a good rate of employment with percentages similar to London and national levels but well below those for the South East. Females in Slough are relatively less employed than males and there is a bigger difference between males and females unemployed compared to London and the UK.

Table: Employment and unemployment (October 2018 - September 2019)

	Slough, (%)	South East, (%)	London, (%)	Great Britain, (%)
All People				
Economically Active†	77.6	81.9	78.1	78.9
In Employment†	73.3	79.3	74.4	75.7
Employees†	62.7	66.9	61.0	64.7
Self Employed†	10.4	12.1	13.1	10.8
Unemployed (Model-Based)§	4.5	3.1	4.6	3.9
Males				
Economically Active†	82.8	85.8	84.4	83.5
In Employment†	78.9	83.0	80.3	79.9
Employees†	62.9	67.6	62.7	65.4
Self Employed†	15.7	15.2	17.3	14.3
Unemployed§	4.7	3.1	4.8	4.1
Females				
Economically Active†	72.1	78.1	71.7	74.4
In Employment†	67.6	75.6	68.5	71.5
Employees†	62.5	66.2	59.3	63.9
Self Employed†	4.8	9.1	8.9	7.3
Unemployed§	6.2	3.1	4.4	3.8

[28] R Huggins, P Thompson, D Prokop, UK Competitiveness Index 2019

Source: ONS annual population survey

† - % are for those aged 16-64

§ - % is a proportion of economically active

5.2.3 Job density

In 2018, across Slough there were 98,000 jobs, equating to a job density of 1.03 (the density is the ratio of total jobs to population aged between 16 and 64 years). The local job density is slightly higher than the average for London (1.02) and notably higher than the average for Great Britain as a whole (0.86).

Table: Job density (2018)

	Slough (Jobs)	Slough (Density)	South East (Density)	London (Density)	Great Britain (Density)
Jobs Density	98,000	1.03	0.88	1.02	0.86

Notes: The density figures represent the ratio of total jobs to population aged 16-64.

Total jobs includes employees, self-employed, government-supported trainees and HM Forces

5.2.4 Breakdown by occupation

The Standard Occupational Classification 2010 (SOC) is a classification system adopted by the Office for National Statistics (ONS) and other institutions to classify jobs in terms of skill level, with 'Managers and Senior Officials' (or Class 1) representing the most skilled occupations and 'Elementary Occupations' (Class 9) representing the least skilled occupations.

The table shows that in Slough the highest proportion of the population (43.9%) is employed in the highest skilled occupations (group 1-3) while other major groups (groups 4-5, groups 6-7, groups 8-9) have a similar proportion of the population employed (around 18.7%).

This follows a trend both in London and in England of having a higher proportion of people employed in the higher skilled occupations (groups 1-3). In London, the proportion of the workforce employed in higher skilled occupations is 58.7%, which is higher than the England figure of 47.4%.

However, the proportion of the population employed in the lowest skilled occupations in Slough (around 18.7%) is higher than that in London (around 12.8%) and in England (around 16.4%). Therefore, the residents of Slough are more widely employed in less skilled occupations than those of the South East, London and Great Britain.

Table: Employment by occupation (October 2018 - September 2019)

	Slough (Numbers)	Slough (%)	South East (%)	London (%)	Great Britain (%)
Soc 2010 Major Group 1-3	31,800	43.9	52.1	58.7	47.4
1 Managers, Directors and Senior Officials	6,500	8.9	12.8	13.3	11.3
2 Professional Occupations	13,700	18.9	23.0	26.4	21.2
3 Associate Professional & Technical	11,600	16.0	16.1	18.7	14.8
Soc 2010 Major Group 4-5	13,400	18.6	19.2	15.8	19.9
4 Administrative & Secretarial	6,400	8.9	10.1	8.9	9.7
5 Skilled Trades Occupations	7,000	9.7	9.0	6.8	10.0
Soc 2010 Major Group 6-7	13,600	18.7	15.2	12.8	16.3
6 Caring, Leisure and Other Service Occupations	8,200	11.3	8.5	7.1	9.0
7 Sales and Customer Service Occupations	5,300	7.4	6.7	5.7	7.3

Soc 2010 Major Group 8-9	13,600	18.8	13.4	12.7	16.4
8 Process Plant & Machine Operatives	5,400	7.4	4.7	4.5	6.2
9 Elementary Occupations	8,200	11.4	8.7	8.1	10.2

Notes: Numbers and % are for those of 16+
% is a proportion of all persons in employment

5.2.5 Job breakdown by sector

Within Slough, the following sectors are particularly important for the local economy in terms of employment: Wholesale and Retail Trade (17.9% employed in this sector), Transportation and Storage (14.3% employed in this sector), Administrative and Support Service Activities (14.3% employed in this sector). A detailed job breakdown by sector is provided in the table.

Table: Job breakdown by sector (2018)

	Slough (numbers)	Slough (%)	South East (%)	London (%)	Great Britain (%)
Total Employee Jobs	84,000	-	-	-	-
Full-Time	63,000	75.0	66.3	73.5	67.6
Part-Time	21,000	25.0	33.7	26.5	32.4
Employee Jobs by Industry					
B : Mining and Quarrying	10	0.0	0.0	0.1	0.2
C : Manufacturing	5,000	6.0	6.4	2.2	8.1
D : Electricity, Gas, Steam and Air Conditioning Supply	500	0.6	0.4	0.4	0.5
E : Water Supply; Sewerage, Waste Management and Remediation Activities	2,250	2.7	0.8	0.3	0.7
F : Construction	2,500	3.0	5.1	3.6	4.7
G : Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	15,000	17.9	16.4	12.0	15.2
H : Transportation and Storage	12,000	14.3	4.7	4.1	4.8
I : Accommodation and Food Service Activities	3,500	4.2	7.4	8.4	7.6
J : Information and Communication	6,000	7.1	5.7	7.9	4.2
K : Financial and Insurance Activities	900	1.1	2.9	7.0	3.5
L : Real Estate Activities	700	0.8	1.4	2.7	1.7
M : Professional, Scientific and Technical Activities	8,000	9.5	9.0	13.7	8.7
N : Administrative and Support Service Activities	12,000	14.3	8.9	10.9	9.1
O : Public Administration and Defence; Compulsory Social Security	1,250	1.5	3.2	4.3	4.3
P : Education	5,000	6.0	10.0	7.4	8.9
Q : Human Health and Social Work Activities	8,000	9.5	12.8	10.3	13.2
R : Arts, Entertainment and Recreation	500	0.6	2.7	2.5	2.5
S : Other Service Activities	1,250	1.5	2.1	2.3	2.0

Notes: % is a proportion of total employee jobs excluding farm-based agriculture
Employee jobs excludes self-employed, government-supported trainees and HM Forces
Data excludes farm-based agriculture

5.2.6 Economic performance

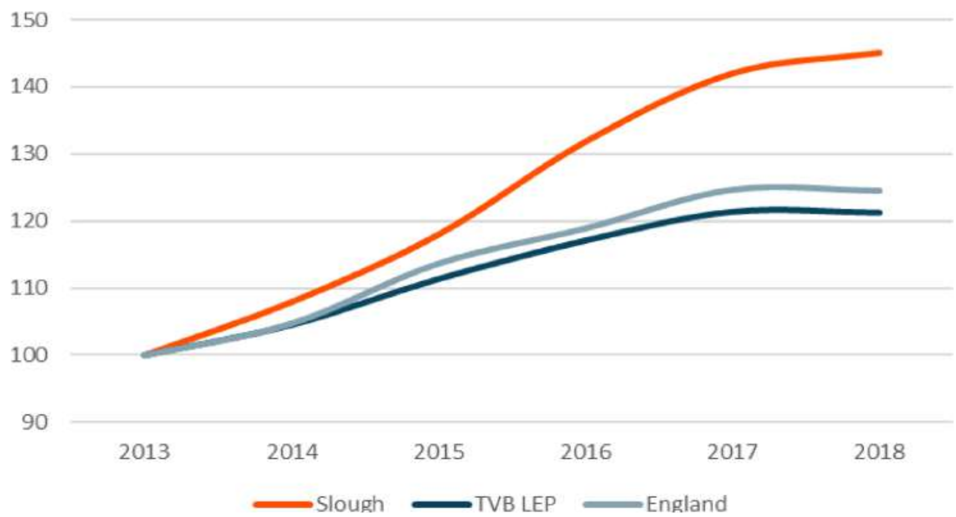
Gross Value Added (GVA) represents the value of goods and services produced in the economy. It is an indicative measure of economic output in a local area and can be benchmarked to show comparisons in economic growth and productivity.

Slough is one of the most productive areas in the UK. Analysis of GVA per Full Time Equivalent (FTE) provides a useful snapshot of an area's productivity performance. According to 'Slough Employment and Skills Study Report' by Hatch Regeneris released in August 2019, in 2017 Slough's GVA per full-time worker was £94,600, which is significantly higher than the TVB LEP (£87,900) and England (£72,100) averages. Despite this, Slough's GVA reduced by 5% between 2012 and 2017, compared with GVA growth in the sub-region (4%) and nationally (8%). This presents a trend that will be addressed by regeneration activities.

Table: GVA per FTE and GVA growth 2015-2017 (Hatch Regeneris, 2019)

Since 2013, change in Slough's business structure has been driven by growth in the number of small and medium-size enterprises (SMEs) in the borough (i.e. an increase of 1,905 businesses). By contrast, the data shows that there has been a small decline (of five businesses) in the number of large businesses over the same period. This is similar to the overall trend seen nationally, where change in the business base is primarily driven by the growth in the number of SMEs trading locally.

Figure: Change in number of businesses 2013-2018



Over the past four years (2015-2018) an average of 1,159 new businesses have started in Slough. In 2018 72.8 new business start-ups were registered per 10,000 residents.

Table: UK Business Counts 2019

	Slough (Numbers)	Slough (%)	South East (Numbers)	South East (%)
Enterprises				
Micro (0 To 9)	5,735	89.9	374,190	90.2
Small (10 To 49)	450	7.1	33,185	8.0
Medium (50 To 249)	155	2.4	6,030	1.5
Large (250+)	40	0.6	1,580	0.4
Total	6,380	-	414,980	-
Local Units			0	
Micro (0 To 9)	6,260	85.2	408,920	85.6
Small (10 To 49)	785	10.7	55,705	11.7
Medium (50 To 249)	255	3.5	11,370	2.4
Large (250+)	45	0.6	1,650	0.3
Total	7,345	-	477,650	-

5.2.7 Travel to work patterns

Because of its geographical proximity and transport links to London, Slough has strong economic connections with the city. According to 'Slough Employment and Skills Study Report' by Hatch Regeneris released in August 2019, over 12,400 people travel into London from Slough to work each day and 9,250 travel to Slough from London to work each day. Just over half of these flows are between London boroughs Hillingdon and Hounslow, with a combined 7,600 people travelling to these boroughs from Slough each day and 5,200 people coming into Slough to work from these boroughs.

5.2.8 Earnings

The average gross weekly pay for full-time workers in Slough in 2019 was £613.9, which is lower than the London average of £699.20, but higher than the Great Britain average of £587.00. There is a greater disparity between male and female pay in Slough compared to the disparity at a regional and national level. In Slough, women earn on average £179.60 less per week than their male counterparts, compared to £91.50 less in London and £103.10 less across Great Britain as a whole.

- Slough is ranked 17 out of the 67 localities in the South East and 39 out of the total 379 localities in the UK in the UK Competitiveness Index 2019.
- The population of Slough has a somewhat lower employment rate than London and the UK, especially among women, despite a high job density of 1.03 (the density is the ratio of total jobs to population aged between 16 and 64 years)
- Although the highest proportion of the population (43.9%) is employed in the highest skilled occupations (group 1-3), Slough has an overall high proportion employed in lower skilled occupations
- Slough has an unusually high proportion employed in the sectors of Wholesale and Retail Trade, Transportation and Storage, and Administrative and Support Service Activities.
- Noticeable is the relatively low proportion employed in the sectors of Arts, Entertainment and Recreation and Education respectively
- Slough is one of the most productive areas in the UK with a Gross Value Added per Full Time Equivalent of £94,600, which is significantly higher than the Thames Valley Berkshire LEP and England averages
- The average gross weekly pay for full-time workers in Slough in 2019 was £613.9, which is lower than the London average but higher than the Great Britain average
- The pay gap between male and female pay is significantly higher in Slough than in London or the UK

5.3 Sector Analysis

5.3.1 UK Cinema Industry

5.3.1.1 Revenue sources

In 2018, the gross income achieved by UK box office sales exceeded £1.282 billion. Although this was an increase of only 0.2% from 2017, when sales reached £1,279 million, since 2009 there has been an upward trend in UK box office earnings - the overall gross income in 2018 was 35.8% higher than in 2009.[29]

Average ticket prices, calculated by dividing the UK-only box office gross income for the year by total UK admissions, went down from £7.49 in 2017 to £7.21 in 2018, representing a decrease of 3.7%. This is the first time the average ticket price has fallen since 2001. The UK Cinema Association, which represents the interests of the majority of UK cinema operators, partially attributed this drop to 'tactical discounting', which is seen in areas with strong local competition among exhibitors, as well as the impact of nationwide discount schemes such as Meerkat Movies, Cineworld Unlimited and Odeon Limitless.[30]

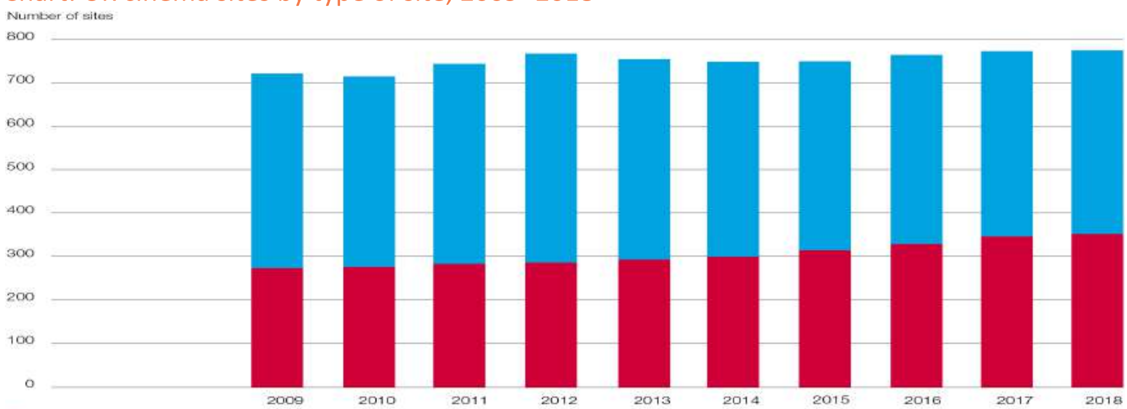
Exhibitors' revenues from refreshment sales were £549 million in 2018, a 2% increase from 2017's £537 million. The average spend on refreshments per individual visit decreased from £3.15 in 2017 to £3.10[31].

Event cinema, alternative content or non-feature film programming has become a regular feature in the UK over recent years following the shift to digital projection. The roll-out of a digital screen base has widened the range of content available on the big screen, allowed for greater interactivity between the screen and the audience, and potentially improved the use of auditorium capacity during typically quiet periods. In 2018, 125 individual events, the majority of which were live, were screened (at least once) in the year, down from 134 in 2017. However, these events generated a total box office of £42 million compared with £34.5 million in 2017. Opera had the greatest number of releases in 2018 with screenings of 30 different productions (24% of all events), while screenings of theatre performances generated the highest earnings (£14 million), a 32% share of the total box office.[32]

5.3.1.2 Cinema sites and screens[33]

In 2018, there were 775 cinemas in the UK and 45.5% of these were multiplex sites. With the proportion of multiplex sites increasing by 7.5 percentage points between 2009 and 2018, there is a clear trend in the industry showing the demise of traditional and mixed-use venues used for film screenings only part of the time. The number of these sites has steadily decreased from a higher point of 481 in 2012 to 422 in 2018.

Chart: UK cinema sites by type of site, 2009- 2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Multiplex	275	278	285	288	295	301	316	331	348	353
Traditional and mixed use	448	438	460	481	461	449	435	435	426	422
Total sites	723	716	745	769	756	750	751	766	774	775
% multiplex sites	38.0	38.8	38.3	37.5	39.0	40.1	42.1	43.2	45.0	45.5

Source: Dodona Research, BFI
Notes:
Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.
Mixed use cinemas are used for screenings only part of the time.

29 BFI Statistical Yearbook 2019 (Film at the Cinema)
30 BFI Statistical Yearbook 2019 (Distribution and Exhibition)
31 Ibid.
32 Ibid.
33 BFI Statistical Yearbook 2019 (Distribution and Exhibition)

Following the same trend as multiplex sites, the overall number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) has risen every year since 2009. In 2018, the total number of screens stood at 4,340, a rise of 19% over the 10-year period. This growth is primarily due to an increase in multiplex provision. Over this period, the UK gained 649 multiplex screens and 40 traditional or mixed-use screens, while the share of multiplex screens increased from 75% to 78%. In 2018, there were 3,384 multiplex screens and 956 traditional or mixed-use screens.

In 2018, 97.5% of all screens in the UK were located in urban or suburban locations. There were increases in the numbers of screens in all locations during the year compared with 2017, with the exception of suburban and rural areas, where numbers remained the same. The largest increase numerically was seen in town and city centre cinemas, where there were 55 new screens, an increase in provision of 3% compared with 2017, whilst there were 17 new out of town screens (a 1% increase).

Table: Screens by location, 2017-2018

Location	2017	2018	% change 2017-18	Average no of screens per site
Town/ city centre	2,057	2,112	2.7	4.4
Out of town	1,457	1,474	1.2	10.2
Edge of centre	613	617	0.7	8.7
Suburban	29	29	-	1.9
Rural	108	108	-	1.6
Total	4,264	4,340	1.8	5.6

5.3.1.3 Screen density and admissions per person[34]

Screen density is a standard measure for assessing levels of cinema provision. This can be used as a gauge of whether a particular location has above or below average cinema provision – and therefore whether geographically defined audiences have relatively good or poor access to cinema.

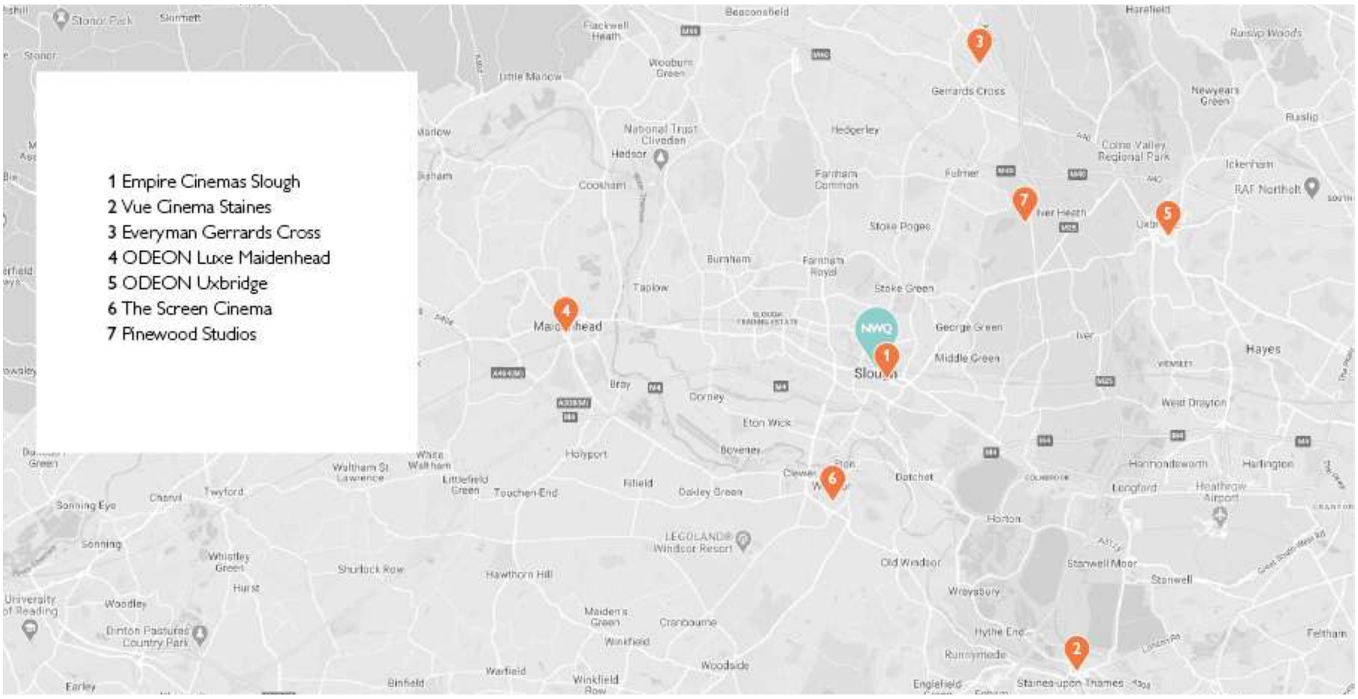
The table below provides a summary of the number of screens by region and by population. The regional boundaries are based on television advertising regions used by the Incorporated Society of British Advertisers (ISBA), while populations are based on official 2018 population figures from ONS. In 2018, there were 6.5 screens per 100,000 population across the UK, while the figure for the South and South East was 5.2.

Table: Screens and population by ISBA TV regions, 2018 (ranked by screens per 100,000 people)

ISBA TV region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (000)	Admissions (million)	Admissions per screen	Admissions per person
London	7	956	22	165	13,440	40	41,841	3
South and South East	5	391	9	80	7,464	22	55,499	3
Total UK	7	4,340	100	775	65,535	177	40,783	3

[34] BFI Statistical Yearbook 2019 (Distribution and Exhibition)

Figure and table: Regional Cinema Competitors



Cinema within 15 km from Slough	No of Screens/Seats	Screen sizes	Ticket price	Description
Odeon Lux Maidenhead	8/619	Screen 1/118 seats Screen 2/110 seats Screen 3/63 seats Screen 4/56 seats Screen 5/87 seats Screen 6/76 seats Screen 7/41 seats Screen 8/78 seats	2D Adult £9.25-£12.25 Bolshoi Ballet Live Adult £18.75 Online booking fee £0.75	It is a luxury cinema with high-quality comfort seats design. It can be rented for private screenings, conferences and other private events.
The Screen Cinema in The Old Court Artspace	1/132	132	2D Adult £10	The Screen Cinema sits in the Old Court in Windsor - the court is a vibrant arts centre with an event programme that features an eclectic mix of live music, drama, comedy, film and a bar. It is the first Digital Cinema in Windsor.
Odeon Uxbridge	9/1,182	Screen 1/270 seats Screen 2/285 seats Screen 3/226 seats Screen 4/226 seats Screen 5/128 seats Screen 6/155 seats Screen 7/213 seats Screen 8/155 seats Screen 9/224 seats	2D Adult £10.75-£13.75 IMAX Adult £18.25 NT Live Adult £23.25 Online booking fee £0.75	The cinema presents high-quality screens including high-resolution 3D screens and 1 IMAX screen. It can be rented for private screenings, conferences and other private events.
Everyman Gerrards Cross	3/255	Screen 1/126 seats Screen 2/87 seats Screen 3/42 seats	2D Adult £12.30-15.40 ROH Live Adult £21.00 Booking fee £1.90	A 3-screen boutique cinema with the theme comparable to that of a relaxed bar.
Vue Cinema Staines	10/1,742	Screen 1/117 seats Screen 2/142 seats Screen 3/143 seats Screen 4/119 seats Screen 5/215 seats Screen 6/215 seats Screen 7/136 seats Screen 8/127 seats	Adult Standard £6.74/ Reclining £11.74 Bolshoi Ballet Live Adult Standard £18.24/ Reclining seat £23.24 Booking fee £0.75	The multiplex is operated by one of the world's leading cinema operators. Screening a mix of blockbusters and event cinema including opera and theatre and live streaming of sport events and concerts.

		Screen 9/254 seats Screen 10/274 seats		
Pinewood Studios/ Weekends only	1/108	108	Adult £13.50-14.50	Private cinemas only operated on weekends. Only pre booked tickets are available.
Empire Cinemas	10/1,642	Screen 1/140 seats Screen 2/130 seats Screen 3/160 seats Screen 4/354 seats Screen 5/467 seats Screen 6/160 seats Screen 7/92 seats Screen 8/144 seats Screen 9/83 seats Screen 10/72 seats	2D Adult £8.75 NT Live Adult £17.50 Booking fee £0.70	The Empire Cinema is located in the Queensmere Shopping Centre in Slough

5.3.1.4 Slough cinema market

By applying statistics for screen density and admission on a regional / local level, it is possible to construct a snapshot of cinema provision and cinema-going in the region, which can provide an indication of the number of cinema screens that is viable in a given location. Slough is in the South East of England region (as defined by Incorporated Society of British Advertisers). Below are the key stats taken into account when considering the viability of new screens in Slough, as presented in the BFI's Statistical Yearbook 2019:

- Average admission per person in the UK in 2019 was 2.6
- South and South East of England's number of admissions per person in 2019 was 2.9, above the UK average

Research by the Independent Cinema Office in 2016 presented the following criteria for the successful operation of cinemas:

- As a single screen operation, the screen would need to achieve in the range of 40–50,000 admissions annually
- In a two-screen operation, each screen would need to achieve 35-40,000 annual admissions
- In a 3-5 screen operation, with mixed screen sizes, each screen would need to achieve no less than 30-35,000 admissions per year
- In a multiplex operation, each screen would need to achieve no less than 25-30,000 admissions per year

Loyal audiences are an important base to sustain a cinema, generating ticket revenue as well as ancillary sales. When planning for a new cinema development, a catchment area that the new site will serve and from which it can expect to draw audiences has to be established. The most common way of defining a cinema's catchment population is a drive-time boundary (driving regions based on driving time or driving distance). The boundary considers the type and quality of road links as well as distance. Barker Langham has used different data sets to establish a potential catchment area for NWQ as summarised below:

- Slough population
- Ten minutes' drivetime from NWQ
- A four-mile driving distance from NWQ

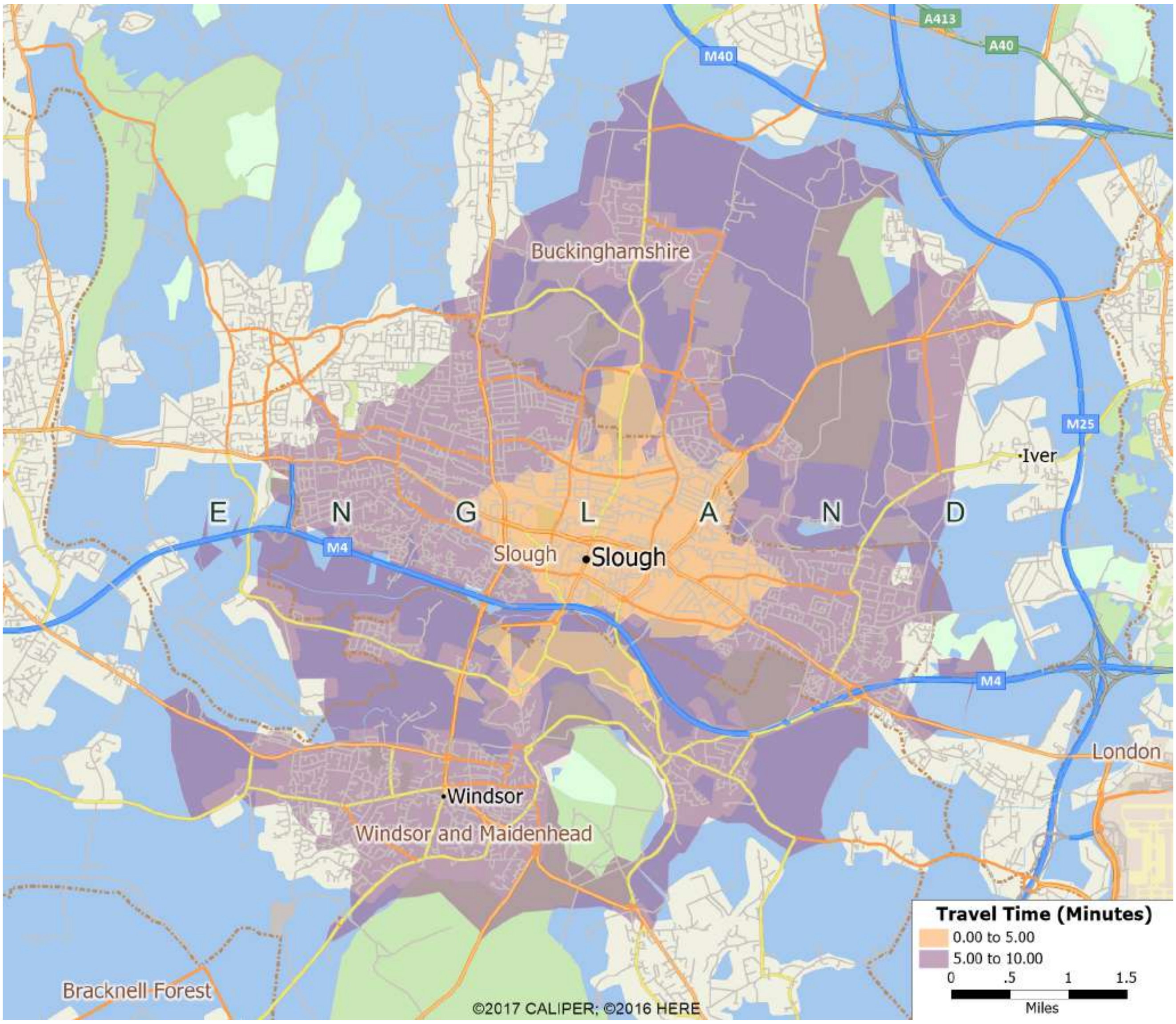
Slough population

The population of Slough was 149,100 in 2018 according to NOMIS. The South and South East of England's average cinema visits per person in 2018 was 2.9. Multiplying Slough's population with the average cinema visits per person produces an estimated annual admission of 432,390. The estimated annual admission from the local population would be sufficient to sustain a multiplex cinema according to the ICO criteria.

Ten minutes' drivetime from NWQ

In order to assess audience potential for most cultural activities, a standard method is to measure a catchment area using a 30-minute drive time, which, outside of conurbations, equates to a radius of 7-10 miles. For this assessment, smaller catchment areas of ten minutes' drive time and a four-mile driving distance from NWQ have been used. Both catchment areas exclude any cinema complex with more than one screen outside Slough.

Image: Catchment area based on ten minutes' drive time

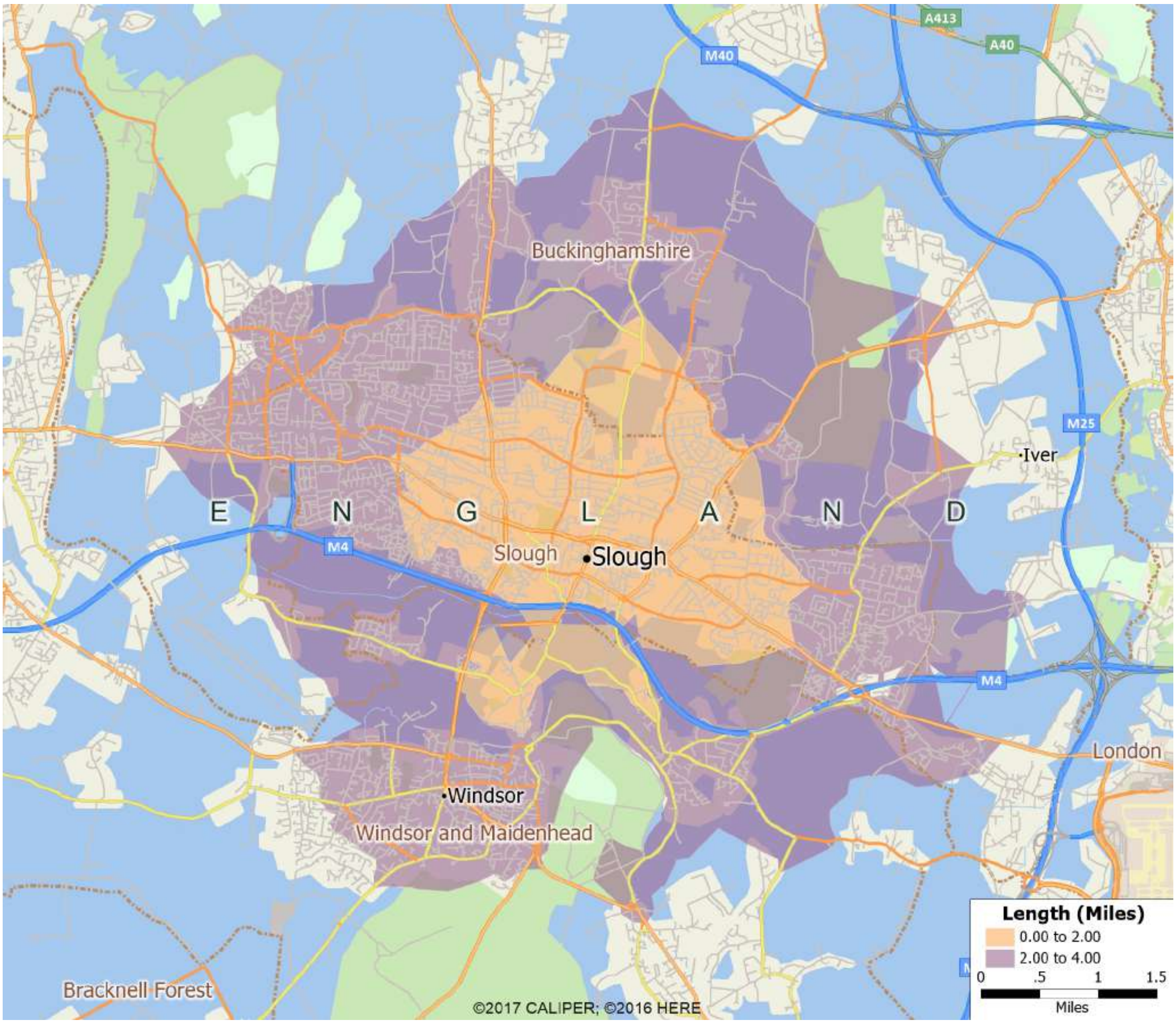


The catchment population based on ten minutes' drive time from NWQ is 190,371. Multiplying this catchment population with the South and South East of England cinema visits per person in 2018 produces an estimated annual admission of 552,076, which would be sufficient to sustain a multiplex cinema according to the ICO criteria.

A four-mile driving distance from NWQ

The catchment population based on a four-mile driving distance is 171,479. Multiplying this catchment population with the South and South East of England cinema visits per person in 2018 produces an estimated annual admission of 497,289, which would be sufficient to sustain a multiplex cinema according to the ICO criteria.

Image: Catchment area based on a four mile driving distance



Conclusion of methodologies

The average of the above different methodologies to estimate a potential cinema audience for Slough generates c.493,918 cinema visits per year as outlined in the table below.

	Catchment population	Annual visits
Slough Population	149,100	432,390
10 minutes' drive time	190,371	552,076
Four-mile drive radius	171,479	497,289
Average		493,918

- UK box office sales continue to increase and overall gross income has increased by 35.8% since 2009
- The average ticket price, calculated by dividing the box office gross income by admissions, is £7.21
- The average spend on refreshments per individual visit is £3.15
- A catchment area calculation indicates that the potential annual cinema audience in Slough is c. 500,000.
- There is only one cinema competitor in Slough, the ten screen multiplex Empire Cinemas
- There is sufficient cinema audience in Slough to support a single or multiple screen cinema at NWQ, even if Empire Cinemas is retained after the Queensmere regeneration

5.3.2 UK Theatre industry

In 2018, the UK theatre industry registered positive trends in attendance, number of performances and total revenues. Theatres reported an attendance of 18,806,659, which showed a slight increase of 0.3% from 2017; also the total number of performances (44,237) had increased 0.2% from 2017. Accordingly, the gross revenues increased 8.4% from 2017 (£509,567,967 in 2018) and the average ticket price increased 8.0% from 2017 (£27.10 in 2018)[35].

Figure: Overall figures of UK theatre industry

	Number of productions	Number of performances	Total tickets sold	Total box office income	%age capacity achieved
2013	4,933	40,889	17,615,460	£396,912,018	59.0%
2014	5,280	43,952	19,084,886	£455,317,021	59.0%
2015	5,237	43,308	19,189,156	£455,253,946	59.0%
2016	5,496	42,638	19,020,277	£469,991,837	61.0%
2017	5,349	44,135	18,744,075	£470,260,893	59.0%
2018		44,237	1,191,199	£509,567,967	61.0%
Change 2013-18		3,348	62,584	£112,655,949	2.0%
Change 2017-18		102		£39,307,075	1.2%

The vast majority of the cumulative increased income (£35.0 million) was achieved by principally presenting theatres with a capacity of over 1,000 (89% of overall growth in income). Members reported growth in cumulative sales and revenues for all venue types except concert halls (with a 2% drop in audience numbers) and auditoria of principally producing theatres with capacity over 160 (with a 9% drop in audience numbers and 3% drop in income).

The average price paid rose by just over £2 in 2018 to £27.10. This is a real term increase of 5% when inflation (CPI) is accounted for. Only principally presenting theatres with a capacity of over 1,000 saw increases in yield at this level. For two venue types (auditoria of principally presenting theatres with a capacity between 500-1,000 and auditoria of principally presenting theatres with a capacity between 200 and 500) did average yield grow at less than inflation.

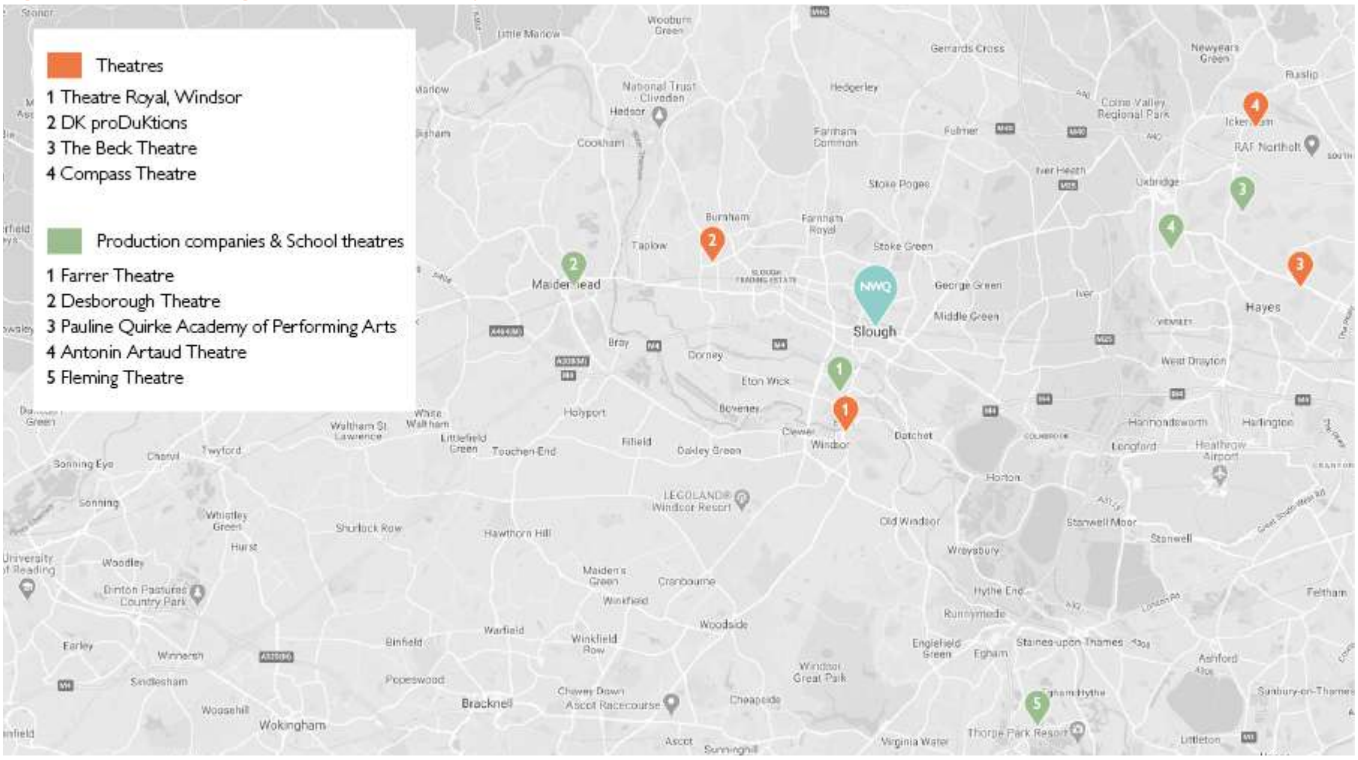
Although there were more performances in 2018, in total there were fewer seats available than in 2017 and on average theatres were 2% more full. The main auditoria of larger producing theatres were fuller than any other type of venue (66%) but the auditoria of principally presenting theatres with a capacity between 200 and 500 were on average less than half full (48%).

[35] UK Theatre 2019 - SALES DATA HEADLINES 2018

Table: UK Theatre 2018 attendances and revenue by venue type (with percentage comparisons to 2017):

Venue type	Attendance	% increase/decrease from 2017	Revenue	% increase/decrease from 2017
Main auditoria of larger producing theatres	1,910,930	+0.8%	£47,227,161	+4.8%
Principally presenting theatres with capacity of over 1000	9,351,676	+2.8%	£302,805,026	+13.1%
Concert halls	1,695,522	-2.0%	£46,836,672	+4.4%
Principally presenting theatres with capacity of 500 – 1000	2,874,216	+0.3%	£61,248,831	+1.2%
Auditoria of principally producing theatres with capacity of over 160	1,747,367	-9.4%	£33,821,256	-2.9%
Principally presenting theatres with capacity of 200 – 500	599,807	+1.0%	£8,583,046	+3.0%

Figure and table: Regional Theatre Competitors



Theatres	Capacity	Price	Description
Theatre Royal, Windsor	633	Panto £18.50-41.50 Musical £17.50-36.00 Children Theatre £17.50-30.00	Both produces and presents a programme of drama, theatre and panto.
Desborough Theatre			The theatre is located in the Town Hall and hosts plays, pantomimes and shows throughout the year. The Royal Borough of Windsor & Maidenhead allocated £2m in 2019 for refurbishment.
The Beck Theatre	600	Panto £26.00-29.50 Music £29.00 NT Live £14.50 Cinema £7.00 Comedy £24.00	The Beck Theatre is a 600-seater venue in the London Borough of Hillingdon operated by HQ Theatres.

Compass Theatre	158		London Borough of Hillingdon owned theatre providing a range of activities for the whole community.

Production companies & School theatres	Seats	Description
DK proDuKtions		Producing quality, professional theatre productions and events including musicals, pantomimes and theatre performances.
Pauline Quirke Academy of Performing Arts		Weekend performing arts school, with classes for kids and young adults in Comedy & Drama, Musical Theatre (singing & dancing) and Film & Television.
Farrer Theatre	401	Flexible auditorium that is part of Eton College.
Antonin Arnaud Theatre		Dedicated space for theatre and creative arts students at Brunel University London
Fleming Theatre	300	The Fleming Theatre hosts school productions

- In 2018, the UK theatre industry has registered a positive trend in attendance, number of performances and total revenues
- Growth occurred in all principally presenting theatres.
- Smaller principally theatres experienced a huge drop in attendance and revenue

5.3.3 Innovation Space Market[36]

Innovation Spaces are not always easy to distinguish from other forms of provision. SQW's definition of Innovation Spaces is:

'Spaces which provide entrepreneurs and businesses with accommodation on flexible terms and access to supporting administrative, business and innovation support services and networks.'

Berkshire had a higher number of business births than 'deaths' each year between 2012 and 2017. But business survival rate varies greatly in Berkshire with a survival rate above 45% in West Berkshire, Windsor and Maidenhead and Wokingham but only 41.5% in Slough.

Thames Valley Berkshire LEP also has a healthy track record of firms involved in innovation (Product and Service innovation 22% and Process innovation 17%). Added together Thames Valley Berkshire perform in line with surrounding regions.

Consultations regarding innovation space indicates that:

- Demand is for both flexible and affordable innovation space.
- Strongest demand comes from small, established business (2-10 employees) and not from one-person start-ups.
- Whilst the supply of managed offices space and co-working spaces is sufficient these could be more integrated with support organisations.
- A majority of the consultees believe that innovations space help to create vibrant town centres by increase in mix of work, retail and leisure offers.

An overview of current supply indicates that a majority of the offers is commercial co-working spaces in town-centres that, in general, isn't actively facilitating or animating an innovation process, whilst only a few Specialist Innovation spaces exists. A Specialist Innovation space is defined by innovation being its primary rationale/objective. Out of the 32 identified Innovation spaces 16 are located in Reading and only five in Slough of which no-one was classified as Specialist Innovation Space.

[36] An assessment of the availability and role of Innovation Spaces in Berkshire, Report to Thames Valley Berkshire Local Enterprise Partnership by SQW, June 2019

The Specialist Innovation spaces are more active in offering business support, incubator facilities and networking opportunities and tends to be part of a university campus and not only offer flexible office space. Consultees highlighted the success of Thames Valley Science Park in forging links between academia and business and a key success factor for Bracknell Enterprise is its location in the town centre with good communication links. The consultees described the commercial co-working spaces as not providing sufficient business support and failing to spark collaboration between firms.

SQW conclude "that there is not currently a lack of provision of Innovation Spaces in Berkshire per se, but that there may be a mismatch of supply and demand, and an over-supply of the wrong type of space. This is resulting in a certain level of unmet demand for innovation space in the region."

There are some key learnings raised by SQW:

- Take steps to ensure that business support/growth advisors are visible in all co-working spaces.
- Put in place affordable "Innovation Spaces" within the main town centres.
- Facilitate more joint ventures between the private and public sector, recognising that local authorities have a key role to play in tailoring products to meet local needs.
- Unlock local authority and other public sector owned space for the provision of Innovation Spaces.
- Develop the role and range of Anchor Institutions, i.e. a university of international company.
- Consider the development of sector-specific Innovation Spaces.

- Slough has a high rate of business births, but business survival rate is lower than in the rest of Thames Valley Berkshire LEP region.
- There is a high supply of commercial co-working spaces but a shortage of Specialist Innovation spaces.
- Innovation spaces benefit:
    - Of being in a town centre.
    - Of joint ventures between the private and public sector.
    - From facilitating more joint ventures between the private and public sector.
    - From a key anchor institution, i.e. academia or commercial.
    - From developing sector-specific spaces.

5.3.4 eSports industry

5.3.4.1 Introduction

Within the cultural hub for Slough's North West Quadrant development, there is the potential to incorporate eSports facilities into multiuse space as part of a rich, forward-looking and agile offer – given the emergent digital nature of the economy. This section explores the current and emerging value of and demand for eSports in global and UK contexts, in order to outline the scope for this option.

5.3.4.2 What are eSports?

eSports is competitive video gaming, in which amateur or professional gamers participate in organised leagues or tournaments, often with live or online spectators. eSports can be team-based or pit individual gamers against one another; the format depends on the game in question. Leagues and tournaments operate nationally, regionally and globally, sometimes divided by game title and sometimes combining multiple games.

Popular game types for eSports are multiplayer online battle arena (MOBA) games and fist-person shooters[37]. The former are team games in which the objective is to destroy the opposing team's base or similar. First-person shooters, also often team games, feature weapons-based combat shown from a first-person perspective. Other eSports include card games, strategy games, fighting games and sports games (based on traditional sports such as

[37] "What Are Esports? | A Beginner's Guide". 2017. *The Telegraph*. https://www.telegraph.co.uk/gaming/guides/esports-beginners-guide/.

football). The latter are developing interesting links between traditional and eSports, which are discussed below[38].

The bulk of eSports spectating takes place online. Popular online platforms vary by region, but YouTube and Twitch (owned by Amazon) are key streaming sites in the UK and US. eSports have made inroads onto television, with ESPN showing some tournaments. In the UK, British eSports organiser Gfinity partnered with both BT Sports and digital-only platform BBC Three in 2017; both platforms showed Gfinity's Elite Series Tournaments on Fridays. In 2019, Sky Sports UK began broadcasting the ePremier League, an eSports version of football's Premier League played through the FIFA game series[39].

While online streaming is the most popular way to watch eSports, live crowds can attend events on all scales and at all levels. The largest events, including world championships, take place over multiple days and even in multiple cities; they are often held in major arenas and can draw crowds in the tens of thousands.

5.3.4.3 Value and demand

Global

As a global industry, eSports' revenues are expected to have exceeded $1billion in 2019[40]. eSports has been forecast to be worth around $1.5billion in 2020, or $1.7billion by 2021[41]. In 2017, sponsorship was the primary income stream for eSports, representing 38% of revenue. This was followed by advertising (22%), media rights (14%), and ticket sales (9%). Goldman Sachs forecast that by 2022, media rights will have taken over from sponsorship as the largest revenue source (40% and 35% respectively)[42].

In 2018, eSports was expected to generate $345million in revenue in North America. This would have put it significantly below US major league sports in terms of revenue, as would projected income figures for the early 2020s; the National Football League (NFL) and Major League Baseball (MLB) each brought in over $10billion in 2017[43]. This comparison, however, is perhaps not a fair reflection of eSports' full value and potential, as major league sports are supported by organised national leagues and this infrastructure is not yet established for eSports[44].

Perhaps a more enlightening comparison between eSports and traditional sports is the prize pools at major events. The 2018 Dota 2 International (the world championship for this MOBA game) offered a total prize pool of $25.5million. This was more than motor racing's Daytona 500 2018 ($15.5million) and golf's US Open 2018 ($12millon). In turn, the 2017 world championship for League of Legends (another MOBA game) offered $4.9million in prize money, more than the 2018 Tour de France ($2.7million) and the 2018 Kentucky Derby ($2million). The prize money for the Dota 2 International was largely sourced from gamers buying in-game items[45].

This reflects the vast and growing audience for eSports events, largely comprising online viewers. Based on a 2018 NewZoo survey, Goldman Sachs estimated the global eSports audience at 167million[46]. In 2017, 355billion minutes of eSports were watched on Twitch, up 22% year on year[47].

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[38] "A League They Can Own: Why Pro Footballers Are Signing Up Star Video Gamers". 2019. *The Guardian*. https://www.theguardian.com/games/2019/jan/29/esports-virtual-football-champions-league-pro-footballers-sign-star-video-gamers.
[39] "Let's Play! The European eSports Market". *Deloitte Insights*: https://documents.deloitte.com/insights/LetsPlay, p.22
[40] "Global Esports Revenue Reaches More Than $1 Billion As Audience Figures Exceed 433 Million". 2019. *Forbes.Com*. https://www.forbes.com/sites/jamesayles/2019/12/03/global-esports-revenue-reaches-more-than-1-billion-as-audience-figures-exceed-433-million/#6670f1521329.
[41] "What Are Esports? | A Beginner's Guide". 2017; "A League They Can Own: Why Pro Footballers Are Signing Up Star Video Gamers" 2019; "The Massive Popularity of Esports, In Charts". 2018. *Washington Post*. https://www.washingtonpost.com/business/2018/08/27/massive-popularity-esports-charts/.
[42] "Goldman Sachs - Esports Joins The Big Leagues". Date unknown. *Goldman Sachs*. https://www.goldmansachs.com/insights/pages/infographics/e-sports/index.html?cid=sch-pd-bing-esportshub-searchad-201810-----&mkwid=9b1dvEvt.; "The Massive Popularity of Esports, In Charts". 2018.
[43] "The Massive Popularity of Esports, In Charts". 2018.
[44] Ibid.
[45] Ibid.
[46] "Goldman Sachs - Esports Joins The Big Leagues". Date unknown.
[47] Ibid.

Some large eSports events have attracted audiences of over 100million. The 2017 League of Legends Championship, for example, drew 106.2million viewers, around the same as the 2018 Super Bowl. The 2018 Dota 2 International attracted 15million. For comparison, the 2018 Kentucky Derby had a viewership of 15million; Wimbledon 2018 had 9.44million; Daytona 500 2018 had 9.3 million; the 2018 US Open had 9.1million; and the 2017 Tour de France had 7.3[48].

China, where the popularity of eSports is growing rapidly, provides much of this audience – 98% of those who watched the 2017 League of Legends Championship did so from within China49. According to a 2017 YouGov report, over 45% of Chinese adults with online access have watched eSports50. However, this should not be seen to undermine the wider global popularity of eSports, which in 2019 was reported to have a larger audience than the MLB without counting its following in China[51].

UK

According to 2017 research by YouGov, 35% of UK adults are aware of eSports – representing 18.3million people. Among 18-24 year olds, that percentage rose to 64%. Those who had watched eSports represented 7% of the UK population, accounting for 3.6million people, while 8% of UK adults were interested in doing so, equivalent to 4.4million people. Almost 3 in 5 (57%) of those who had watched eSports were interested in doing so again, and 22% watched at least monthly, rising to 26% among 18-24 year olds[52]. This data suggests there is a significant and dedicated audience for eSports establishing itself in the UK.

Evidence suggests this audience is growing – research from Kantar showed a rise in the number of adults in Britain watching eSports and other competitive gaming events from 815,000 in 2017 to 1.2million in 2019[53]. A 2017 report from global measurement company Nielsen showed that 34% of UK eSports fans had started following eSports within the last year; 55% had started 1-3 years ago; and just 11% had been following for four or more years. The Nielsen study also found that 14% of UK eSports fans had attended a live eSports event in the past year[54].

5.3.4.4 Live eSports venues

eSports events take place on a wide range of scales and in a wide range of venues worldwide. Major, international live eSports events occupy major stadia, often for multiple days. The 2017 League of Legends World Championships 2017 was held in the Beijing National Stadium (also known as the Birds Nest). The 2019 Fortnite World Cup sold out New York's Billie Jean King National Tennis Centre for three days, as 200 finalists from 34 countries competed for a total prize pot of $30million[55].

The UK has only one dedicated eSports facility: the 600-capacity Gfinity Arena, located within Fulham Broadway's Vue Cinema[56]. Gfinity is among the UK's largest eSports tournament organisers, alongside others including ESL and Multiplay[57]. The Gfinity Arena was the venue for the 2019 Formula One eSports series final, which saw ten

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48 "The Massive Popularity of Esports, In Charts". 2018.
49 "The Massive Popularity of Esports, In Charts". 2018.
50 "New Reports Explore the Size Of UK Esports - British Esports Association". 2019. *British Esports Association*. https://britishesports.org/news/new-reports-explore-the-size-of-uk-esports/.
51 "Global Esports Popularity Give Gamer Companies Reason To Be Bullish". 2019. *Forbes.Com*. https://www.forbes.com/sites/kenrapoza/2019/05/29/global-esports-popularity-give-gamer-companies-reason-to-be-bullish/#50816d71bde6.
52 YouGov. 2017. "Just A Game? Understanding The Existing And Future Esports Market In The UK."
53 "1.2M Adults In Britain Watch Esports, According To New Research By Kantar - Esports News UK". 2019. Esports News UK. https://esports-news.co.uk/2019/11/09/over-1m-adults-in-britain-watch-esports-kantar/.
54 Nielsen. 2019. "eSports playbook for brands". https://www.nielsen.com/wp-content/uploads/sites/3/2019/04/nielsen-esports-playbook-1.pdfv
55 "Fortnite World Cup: The $30M Tournament Shows Esports' Future Is Already Here". 2019. The Guardian. https://www.theguardian.com/sport/2019/jul/30/fortnite-world-cup-esports.
56 "What Are Esports? | A Beginner's Guide". 2017.; "eSports comes alive at the Gfinity Arena". 2019. Gfinity PLC. https://www.gfinityplc.com/news/esports-comes-alive-at-the-gfinity-arena/
57 "Spectating eSports: where to begin". 2019. British Esports Association. https://britishesports.org/news/spectating-esports-where-to-begin/

teams (all associated with official Formula One teams) racing for prize money of $500,000[58]. Other UK eSports venues are generally adapted or multiuse spaces in venues of other kinds; for example, Metronome, a cultural venue in Nottingham, hosts eSports events in its flexible, 400-capacity auditorium. The UK grassroots eSports scene centres around gaming centres, bars and cafés.

5.3.4.5 Traditional sports crossover

The growing engagement of traditional sports bodies and clubs with eSports is a compelling demonstration of eSports' growing significance and is enhancing eSports' cultural capital. Major sporting leagues are collaborating with games companies to create official eSports versions of themselves. The ePremier League is now in its second season[59] and 2019 saw the inaugural Uefa eChampions League; both contests are played through EA Sports' FIFA football game franchise[60]. The USA's NFL and National Basketball Association (NBA) have also worked with partners to form their own e-leagues. There is a trend towards sports stars investing in eSports. Premier League footballers Mesut Özil and Christian Fuchs both have their own FIFA teams, for example, and three-time NBA champion Rick Fox (of the Los Angeles Lakers) owns Echo Fox, which 'fields' teams in a variety of eSports[61].

Football's engagement with FIFA reflects the popularity and potential of sports games as eSports. The 2017 YouGov study found sports games were the most popular type of game people were interested in watching. FIFA was both the most watched game and the game people were most interested in watching[62]. There is some evidence suggesting cross-pollination between traditional sports and eSports in terms of audiences. The 2017 Nielsen study found the traditional sports in which eSports fans were most interested (soccer, football, basketball, boxing and motorsport) were generally those with successful videogame equivalents. Levels of interest in traditional sport among UK eSports fans were relatively high: 59% were interested in football, 42% in boxing and 36% in motorsport[63].

5.3.4.6 Conclusion

eSports is a valuable and expanding global industry, with significant scope for growth and development. Its current value derives from a huge worldwide audience which, in some respects, rivals those of traditional sports. The bulk of this audience engages with eSports through online streaming, although major live events can draw crowds in the tens of thousands and eSports are making inroads into more traditional media channels. Increasing crossover and collaboration with traditional sports is enhancing the cultural capital of eSports; this effect can be seen clearly in the UK, particularly through links between Premier League football and FIFA eSport.

In the UK, a significant and engaged eSports audience is emerging and growing. There is great potential for large-scale growth of this market going forward. This existing and expanding demand, coupled with a relative shortage of high-quality eSports venues in the UK, makes a case for the inclusion of eSports facilities in Slough's North West Quadrant development, as part of a flexible, varied and agile offer. This would attune with the project's aims of successful youth engagement and maximising Slough's potential as a global centre of digital innovation.

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58 "FI eSports season crosses line before top gamers steer out of virtual world". 2019. The Guardian. https://www.theguardian.com/sport/2019/dec/03/f1-esports-season-jarno-opmeer-renault
59 "Let's Play! The European eSports Market". Deloitte Insights
60 "A League They Can Own: Why Pro Footballers Are Signing Up Star Video Gamers". 2019.
61 Ibid.; "What Are Esports? | A Beginner's Guide". 2017.
62 YouGov. 2017.
63 Nielsen. 2019.

- eSports is competitive video gaming, in which gamers participate in organised leagues or tournaments, often with live or online spectators.
- Popular game types for eSports are multiplayer online battle arena (MOBA) games and first-person shooters
- eSports has been forecast to be worth around $1.5 billion in 2020 globally
- Based on a 2018 NewZoo survey, Goldman Sachs estimated the global eSports audience at 167 million
- The UK has only one dedicated eSports facility: the 600-capacity Gfinity Arena, located within Fulham Broadway's Vue Cinema
- This existing and expanding demand, coupled with a relative shortage of high-quality eSports venues in the UK, makes a case for the inclusion of eSports facilities in NWQ

5.3.5 Digital Art

Digital art is defined as an artistic creation produced using digital technology. Traditionally, art was considered to be painting, drawing or sculpture physically produced by the hand of the artist. The traditional definition of art has expanded beyond paintings and drawings to encompass different forms of artistic production that include digital and computer-generated designs.[64]

Media art is the modern term for works of art that are produced using non-traditional methods such as technology, which were not available in the past. Today, media art describes the output of works that are being produced because of advances in digital technology. Computer graphics, animation, virtual art and interactive art are all considered to be in the class of art now referred to as new media art. Digital technology is defining and expanding the traditional definitions of art. It is the intersection of technology and art that creates this unique form and both disciplines (technology / engineering and the creative industries) must be supported.[65]

Colleges and universities have adopted new majors in various forms of art, including new media and contemporary art. Digital art is fast becoming considered a reputable form of art that is a growing part of society. It is derived from the concept of traditional art forms, but with the components of new technology. Postgraduate courses in digital arts are offered by the University of Kent, Liverpool John Moores University, Queen Mary University of London and the University of East London, among others.

In 2014, the Barbican Gallery in London housed Digital Revolution, an exhibition presenting how digital technology is transforming the arts. Galleries across London and the world are slowly starting to embrace this 'new' exploratory art form – which actually has been around since the 1950s. Today, digital art is a form that evolves in application at an exponential rate – from today's GIF art shared on social media through to curated audio-visual art and electronic music. There is a pressing need for a new and focussed space to support digital art pioneers, to showcase their work, to incubate and develop new forms of art and to lead the dialogue around these forms of expression. The UK's leading institutions in the development of digital art are the Institute of Contemporary Art (London), Serpentine Gallery (London), the Victoria & Albert Museum (London) and the Foundation for Art and Creative Technology (Liverpool).

The rise of new technologies will be a key factor in driving change through enabling interdisciplinary collaborations between musicians, artists, performers and technologists, which would result in the creation of more participatory, multi-dimensional experiences for audiences. Research shows an exponential growth in the size of the AR and VR market from 700 million euros in 2015 to 15 billion euros in 2020, which generates new opportunities in in-house content creation[66]. Virtual galleries and immersive performances can be some of the new means of engaging diverse audiences across dispersed geographies. Harnessing digital technologies in the production of artistic content would also help arts and cultural organisations to better target Millennials who are

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[64] Victoria Blackburn, What is Digital Art? https://www.wisegeek.com/what-is-digital-art.htm accessed 201210
[65] Ibid.
[66] Experimental Culture, A horizon scan commissioned by Arts Council England, March 2018, Nesta

“arguably more likely to expect novelty, choice and personalisation from cultural experiences” as a fully digitally-immersed generation.[67]

- Digital Art is an artistic creation produced using digital technology.
- Colleges and universities have adopted new majors in various forms of art, including new media and contemporary art.
- There is a pressing need for a new and focussed space to support digital art pioneers, to showcase their work, to incubate and develop new forms of art.
- Research shows an exponential growth in the size of the AR and VR market from 700 million euros in 2015 to 15 billion euros in 2020.
- Virtual galleries and immersive performances can be some of the new means of engaging diverse audiences.
- Harnessing digital technologies in the production of artistic content would also help arts and cultural organisations to better target Millennials.

5.4 European Cultural and Creative Cities Monitor[68]

The second edition of the Cultural and Creative Cities Monitor measures and assesses the performance of 190 ‘Cultural and Creative Cities' in Europe vis-à-vis their peers, using both quantitative and qualitative data.

The quantitative information is captured in 29 indicators relevant to nine dimensions, and reflecting three major facets of cities' cultural, social and economic vitality. The 29 individual indicators were selected following an extensive literature review and several rounds of expert consultations:

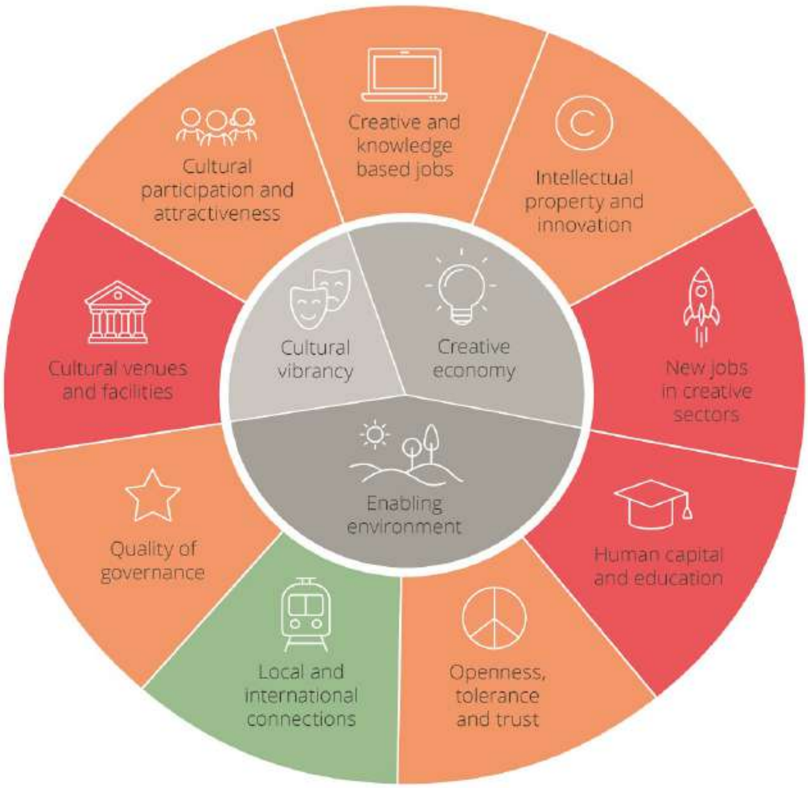
- Cultural Vibrancy (40% weight): it measures a city's cultural ‘ pulse' in terms of cultural infrastructure and participation in culture
- Creative Economy (40% weight): it captures the extent to which the cultural and creative sectors contribute to a city's economy in terms of employment, job creation and innovation
- Enabling Environment (20% weight): it identifies the tangible and intangible assets that help cities attract creative talent and stimulate cultural engagement

[67] Ibid.
[68] Second edition of the Cultural and Creative Cities Monitor https://ec.europa.eu/commission/presscorner/detail/en/qanda_19_6005

Figure: Cultural and Creative Cities Monitor's conceptual framework and indicators

The Cultural and Creative Cities Monitor is the first agreed framework aimed at building a common evidence base on the cultural and creative performance of European cities, with a view to supporting policymakers in identifying strengths, assessing the impact of policy actions, and learning from peers. It also clarifies the importance of culture and creativity for improving resilience and socio-economic performance in cities, and it inspires new research about the role of culture and creativity in cities.

Barker Langham has used the Cultural and Creative Cities Monitor framework in order to assess Slough's current situation and evaluate the areas in which the town scores good performances (green areas) and the services that the town is currently providing only partially (orange areas) or are essential to address (red areas).



5.5 Health and Wellbeing

The World Health Organization (WHO) defines Health as 'a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity.'[69] Therefore, local governments should provide efficient and effective healthcare supports as well as develop policies to ameliorate the life-style of people in order to enable prevention.

5.5.1 Universal Personalised Care

In more recent years, the NHS has started developing programmes in order to support a shift towards a more personalised approach to health and care. NHS has recognised the power of individuals as the best integrators of their own care while having local health and care organisations working together more closely.

The NHS published a Personalised Care document[70] presenting the delivery plan. The document introduces a comprehensive model comprising six, evidence-based standard components, intended to improve health and wellbeing outcomes and quality of care, whilst also enhancing value for money.

The six components are:

- Shared decision making
- Personalised care and support planning
- Enabling choice, including legal rights to choice
- Social prescribing and community-based support
- Supported self-management
- Personal health budgets and integrated personal budgets

5.5.1.1 Social Prescribing

Social prescribing, sometimes referred to as community referral, is a means of enabling GPs, nurses and other primary care professionals to refer people to a range of local, non-clinical services.[71]

Social prescribing aims at:

- addressing people's needs in a holistic way as it recognises that people's health is determined primarily by a range of social, economic and environmental factors
- addressing barriers to engagement and enabling people to play an active part in their care
- supporting individuals to take greater control of their own health and lives
- promoting health and wellbeing and reducing health inequalities in a community setting, using non-clinical methods
- building on the local community assets in developing and delivering the service or activity

Social prescribing is designed to support people with a wide range of social, emotional or practical needs and schemes can involve a variety of activities many of which are focussed on improving mental health and physical well-being. Activities are typically provided by voluntary and community sector organisations. Examples include volunteering, arts activities, group learning, gardening, befriending, cookery, healthy eating advice and a range of sports.

A framework has been developed in order to enable social prescribing connector schemes across the country to capture core impact data, create a consistent evidence base, support the business case and build a national picture on the impact of social prescribing. According to the framework, the outcomes of social prescribing cover the following three key areas:[72]

Impact on the person:

How a person's wellbeing has improved, whether they are less lonely, whether they feel more in control and have a better quality of life

[69] https://www.who.int/about/who-we-are/constitution
[70] Universal Personalised Care: Implementing the Comprehensive Model https://www.england.nhs.uk/wp-content/uploads/2019/01/universal-personalised-care.pdf
[71] https://www.kingsfund.org.uk/publications/social-prescribing
[72] https://www.england.nhs.uk/wp-content/uploads/2019/01/social-prescribing-community-based-support-summary-guide.pdf

Impact on community groups:

An evidence summary published by the University of Westminster suggests that where a person has support through social prescribing, their GP consultations reduce by an average of 28% and A&E attendances by 24%. NHS England and partners want to test this, by supporting local social prescribing schemes and CCGs to develop data sharing agreements around impact on the health and care system.

Impact on the health and care system:

NHS England and partners will support local areas to introduce a regular 'confidence' survey of local community groups, to identify development needs, test whether groups are fully involved and supported to receive appropriate social prescribing referrals.

To complement the outcomes outlined in the framework and encourage a consistent approach, all social prescribing connector schemes need to measure the following outputs:[73]

- number of people referred into social prescribing connector schemes, number of people taking up referrals and number of people rejecting a referral
- characteristics of people referred: age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation
- referral criteria such as Long Term Conditions or in receipt of social care packages.
- referral process and pathway – who refers into the scheme
- number of community groups referred to
- nature of community groups referred to – what kind of support they provide
- number of personalised support plans co-produced with people receiving support
- number of link workers
- number of volunteers
- average amount of time spent with each person
- total investment in the social prescribing connector scheme (input measure)

5.5.2 Healthy Cities

Although healthcare is the primary driver of health and well-being, social and environmental factors play a considerable role too. Globally, around 23% of deaths in 2012 were attributed to the physical environment including air and noise pollution, housing, transport and other factors.[74] Today, more than half of the world's population live in cities and by 2050, this proportion is expected to grow to two-thirds.[75] Therefore, local and national governments should introduce policies so as to ensure the urban planning does provide an environment that can prevent health issues among residents.

According to the World Health Organization, core indicators of a city health profile are:[76]

- Slum housing improvements that benefit health: as assessed by well-defined measures for safe, resilient, and climate-adapted structures that also have access to clean energy and basic utilities
- Urban air quality in terms of particulate pollution: with respect to WHO air quality guidelines
- Healthy, efficient transport: in terms of safety and use of sustainable modes, including walking, cycling, and public transport
- Food security and quality: accessibility and affordability of fresh food markets; reduced concentration of fast-food outlets
- Urban violence: in terms of intentional homicides

73 Ibid
74 https://www.rics.org/uk/news-insight/research/insights/cities-health-and-well-being/
75 https://www.who.int/news-room/commentaries/detail/health-must-be-the-number-one-priority-for-urban-planners
76 https://www.who.int/hia/green_economy/indicators_cities.pdf

5.6 Cultural Assets in Slough

5.6.1 The Curve

The Curve is Slough's iconic culture and library space. It is the first major project delivered by Slough Urban Renewal (SUR). Construction of The Curve began in January 2014 and it opened to the public in September 2016. As the name suggests, the structure is a steel-framed curved rectangle in shape and plan. Each of the building's elevations feature either cantilevers or sloping and curving façades, with the main north side presenting the most striking aspect with a long, sweeping, predominantly glazed elevation looking on to the adjacent listed St Ethelbert's Church.[77]

Table: Building overview

General info	Measures
Total Levels	3
Length	89.7 m
Height	15.5 m
Width	34 m at its maximum
	16.5 m at its narrowest
Overall floor space	4,500 m2
Total investment	£22 million

Table: Tickets prices

Activities	Tickets price
Family activities	Free and charged: £2 - £10
Workshops	£3 - £5
Entertainment	£5 - £15

The building houses: a library, a gallery, Slough Museum learning pods, a performance venue, community learning spaces, computer suites, exhibition space and the Register Office (including a purpose-built wedding room)[78].

- The library: in the first week of operations, more than 7,000 books were issued compared with 11,000 for the previous month as a whole. In the first year of opening, the library saw a 59% increase in library membership and a 42% increase in children's borrowing. Although a variety of events are held in the library space, according to the 'Slough Cultural (Arts) Strategy survey' released in 2019, just over 55% of respondents said they had attended an event in the library in the last year. When asking about attendance at other types of events outside of libraries the majority of respondents went outside of Slough to participate.
- The Venue: a multi-use space that can be adapted for small-scale theatre use and film screenings. It is also used regularly for conferences, town hall style meetings and as the council chamber. The Venue is often used by comedians who hire the space to perform gigs.
- The Gallery: the gallery curates bi-monthly exhibitions of local artists. This enables many local artists to exhibit a body of work, many for the first time, in a prestigious town centre location, providing visibility and a level of promotion of their work. This includes celebration exhibitions of A level and GCSE students' final exam pieces, working with secondary schools across Slough.
- Slough Museum: an independent, accredited museum and registered charity, with a unique collection of more than 6,000 objects and 5,000 photographs which tell the fascinating history of Slough. The Museum opened in 1986 and for more than 25 years has been committed to collecting, documenting, and preserving Slough's local heritage and ensuring Slough's rich history is made accessible to all. Its mission is to inspire, engage and educate through imaginative and inclusive programming and displays exploring and celebrating Slough's past, present and future. It has displays in The Curve – but no permanent home.

[77] https://www.steelconstruction.info/The_Curve,_Slough
[78] Slough Cultural (Arts) Strategy Revised

Table: Room capacity per facility

Facilities	Room capacity
	240 - Lecture hall style
	180 - With seating bank
	150 - No seating
The Venue	100 - Round tables (need to be hired in)
	15 – As meeting room
The Gallery	30 – No furniture
The Green Room	15
The Venue & Green Room (package)	This is The Venue and Green Room capacity combined
	24 – Classroom style
Meeting Room 1 (Second Floor)	30 – Open space
	24 – Classroom style
Meeting Room 2 (Second Floor)	40 – Open space
Meeting Room 3 (IT Suite – First Floor)	24
Meeting Room 4 (Ground Floor)	4

However, the Curve presents some issues:

- The building does not offer appropriate café and bar provision for patrons and this, together with the lay-out of the front of house areas, can pose a challenge to creating a sense of a 'visit to a theatre'
- There is no flexibility for The Curve to provide in-kind rehearsal or incubation space to support local artists and companies to develop. When local artistic companies and communities wish to hire the Venue they perceive the costs as prohibitive. Although hire charges for Council buildings have not risen in 3 years and community hire rates are available, small third sector companies find it difficult to find the money to hire the venue for rehearsals and workshops
- The Corporate Landlord Model recharges the Libraries and Culture Service for the use of the Venue which is an additional cost to the service before it can strike a financial deal with promoters, making it extremely unlikely that the service will break even or make a profit with such a small capacity venue, resulting in most artistic programming requiring a subsidy from the service

5.6.2 HOME Slough

HOME Slough is a consortium of arts and community organisations creating more opportunities for people from Slough's diverse community to experience and embrace the arts in their everyday lives. The aim is to revitalise the arts in Slough, providing new and innovative opportunities for people to both experience and express creativity. The consortium comprises Slough Borough Council, the Clinical Commissioning Group, SEGRO, Slough Council for Voluntary Service (Slough CVS) and Arts Council England (ACE). It is funded by ACE and Slough Borough Council. Slough CVS is the accountable body.

HOME Slough is part of the Creative People and Places programme, initiated and funded by Arts Council England through the National Lottery. Creative People and Places is about more people taking the lead in choosing, creating and taking part in art experiences in the places where they live. There are 21 independent projects, each located in an area where people have traditionally had fewer opportunities to get involved with the arts. Creative People and Places projects have reached over 1.2 million people, 90% of who do not regularly engage in the arts.[79]

HOME Slough's mission is to increase the range and quality of the arts in Slough and get more people to experience them as well as to create their own events. It aims to support Slough's cultural regeneration while building partnerships with national and international organizations.[80]

The programme has three strands to it that are inter-connected, and as an action research project each strand tests different ways in which the project will engage with the community. The three strands are[81]:

[79] https://homeslough.org.uk/about/
[80] Ibid.
[81] Slough Cultural (Arts) Strategy Revised

5.6.2.1 Home on the high street
HOME on the High Street is located in the former Top Shop near the Queensmere Observatory Shopping Centre. It provides a space for community groups to host creative events, for artists to make work, and to programme participatory professional work to reach new audiences. HOME on the High Street is not an arts centre but rather a catalyst for arts activity. HOME on the High Street has reached 15,000 people with 1,500 sessions (workshops, performances etc.) offered and 50,000 volunteer hours given.

In the first quarter of 2019, over 1,200 people came to the shop as audience members or to participate in creative activities and over 7,000 volunteer hours were given. Creative highlights included Ready, Steady, Lift Off, a children's show by A Line Arts that saw children and their families building space suits, and a visit by the Royal Opera House with their pop-up version of La Traviata. Artists utilising the space in 2019 included Rifco Theatre Company, Selina Thompson and Beats & Elements.

5.6.2.2 Festivals development
Highlights of the programme for the first three years included HOME Slough's Streets Alive Festivals, hosted each summer and winter in the centre of Slough. For the next three years, Home Slough will work with community-led outdoor festivals across the town to increase their capacity to programme high quality outdoor work, and it will produce a large-scale outdoor Winter Festival event in the town centre. This key event aims to bring communities together from across the town to participate in and enjoy a spectacle that re-energises the High Street.

5.6.2.3 Home foundations
HOME Foundations will reach residents and artists across the town through a number of initiatives. These include: co-commissions (HOME Build); offering small bursaries to increase creative activity at a hyper-local level (HOME Grown); supporting the skills development of the Cultural sector (HOME Start-up); and networking the creative community (Slough Arts Forum, led by Resource Productions).

5.6.3 Adelphi Theatre[82]
The Adelphi Cinema opened as an Independent cinema in 1930. The venue housed 2,014 seats, a dance hall with spring floor, a stage for live shows, a theatre organ installed on the stage, a café and a free car park.

The Adelphi Theatre was taken over by the Southan Morris Cinemas circuit on 29th May 1933, who quickly passed it onto the Union Cinemas circuit later in 1933. In 1937, Union Cinemas was taken over by Associated British Cinemas (ABC), which operated it until 1953 when Granada Theatre acquired the lease and later bought the site for £250,000.

Live performances at the Adelphi read like a history of popular 20th-century entertainment, including The Beatles, the Rolling Stones, Roy Orbison and Little Richard. The stage facilities in the cinema saw local societies also performing there. The Adelphi Theatre closed on 21st January 1973 and was converted into a Granada Bingo Club which opened on 18th May 1973. From May 1991 it was operated as a Gala Bingo Club and in 2018 it became a Buzz Bingo Club.

5.6.4 Empire Cinemas
Empire Cinemas is situated in the Queensmere Shopping Centre in Slough. It includes 10 screens with 1,642 total seats, with seating capacity in the screens ranging from 83 up to 467. A single ticket ranges in price from £6.75 to £8.75 according to the following breakdown:

82 http://www.sloughhistoryonline.org.uk/ixbin/hixclient.exe?a=query&p=slough&f=generic_objectrecord.htm&_IXFIRST_=1&_IXMAXHITS_=1&%3Dcms_con_core_identifier=sl-sl-rhs_u1_06adelphicinema40b-i-00-000.tif&t=sl-sl-beatlemania&s=T3HuBjrdjnC

Table: Ticket prices breakdown

Group	Prices Off-Peak	Prices Peak	Saverday
	(all Monday - excluding bank and public holidays - + Wednesdays until 5pm + Thursday until 5pm)	(all day Friday, Saturday, Sunday + all day bank and public holidays + Wednesday and Thursday after 5 pm)	(all day Tuesday)
Adult	£ 8.25	£ 8.75	£ 4.50
Concession (students, senior over 60, children under 14)	£ 6.75	£ 7.00	£ 4.50
Family (4 people with a minimum of 2 children)	£ 27.00	£ 28.00	£ 4.50

Ticket prices can be upgraded by £1.50 for 3D screenings and of £1.00 for 3D glasses[83].

The cinema has seen many different chains operate the site. It was built for the Maybox Group, opening on 3rd November 1987 as the Maybox Movie Centre, then became the Gallery when it was operated by Cineplex Odeon. Later operators were Virgin, UGC and Cineworld. At its peak, the site was one of the busiest cinemas in the UK with well over 1,000,000 admissions per year, but due to increasing competition and lack of investment these have steadily been eroded[84].

5.6.5 Creative Academy[85]

Creative Academy is a non-profit organization partnership between Slough Borough Council and The University of West London managed by the Slough Borough Council. Located at The Old Orchard Community Centre, it provides dance degrees and dance training. This course has been developed through funding from the European Commission and Slough Borough Council and launched in 2003. The Creative Academy has successfully positioned its course as an affordable alternative to University and Vocational School dance training. It has strong links with industry and currently has 95% of graduates in employment or going onto higher education.

Classes/degrees	Prices
	free
	£5 -10 per class
Classes	£45 per term
1-year diploma	£6,250 per year
BA degree	£6,200 per year
Master's degree	£7,800 per year

5.6.6 Rifco Theatre[86]

Artistic Director, Pravesh Kumar founded Rifco Theatre Company in 2000 in Slough. Rifco develops and produces new plays and musicals, touring nationally to some of the UK's most prestigious regional theatres. A vital part of Rifco's process of creating new work is through listening and working alongside British Asian communities. Rifco has four main areas of work:

5.6.6.1 Rifco Theatre Company – mid-scale, main stage productions

Rifco Theatre Company develops, produces and tours full-length plays and musicals for mid-scale venues. These high quality and entertaining productions tour to a UK-wide network of theatres.

[83] https://www.empirecinemas.co.uk/cinema_info/empire_slough/t23/
[84] http://cinematreasures.org/theaters
[85] http://www.creativeacademy.org/about/
[86] https://www.rifcotheatre.com/about-us/the-company

5.6.6.2 Rifco Studio – small-scale, studio theatres

Rifco Studio offers the opportunity for commissioning new writing and for developing artists to present work at venues across the UK. The productions are shorter, with fewer cast members and minimal stage setting, but with the same quality, vibrancy and contemporary storytelling that audiences have come to expect from Rifco.

5.6.6.3 Rifco Digital – online content

However, since 2011, Rifco has been a Resident Company at Watford Palace Theatre as Slough lacks suitable theatre facilities.

5.6.7 Other Cultural Sites and Centres[87]

Name	Description
1. Slough Library service	- The Libraries and Culture service works closely with HOME Slough, Slough's Cultural Education Partnership, Slough Museum and Slough Music Service
	- An established charity that has been running for over 80 years
2. Slough CVS	- Supports and develops the voluntary sector in Slough
	- Part of Slough Borough Council's Education and Children's Services and funded by Arts Council England (65%) and traded services (35%)
3. Slough music service	- The network brings together organisations which deliver music education in Slough with those who use the services, from schools, teachers and students to members of the community who benefit from the power of music
	- A social enterprise: a non-profit organisation using arts, culture and heritage to engage, inspire and empower
	- Has a geographical focus on Slough and its immediate surroundings: Berkshire, Buckinghamshire and London
4. Creative Junction	- Works with and for children, young people, families and communities
5. Resource Productions	- Mission: enable social change through art and film, increase diversity in the film market
	- A charity that helps further the education and training of children and young people at risk of being excluded from school
6. Swipe Music	- Provides music lessons, rehearsal spaces, free recording spaces
7. Beat Routes	- Provides music workshops for young people
	- Design, produce and deliver programs on art, study, computer-based graphics, photography
8. Art Beyond Belief	- Mission: get people thinking and talking about their own and others' perspectives on personal issues – for example in mental health, domestic violence and support for people with dementia
9. Art your heart out	- Delivers art and craft activities at community centres and library venues across Slough for children aged 12 and under
10. The Arts Excite	- Helps disadvantaged young people to gain a career in the creative industries
11. Slough Philharmonic Society	- Chorus and orchestra
	- No suitable performance space
	- Charity
	- Mission: end gang violence between Asian young people
12. Aik Soath	- Promotes peace and human rights
13. Artsmark	- Supports schools to develop and implement artistic programs in the education curriculum
	- Creates opportunities for children and young people to have access to creative experiences
14. Artswork	- Collaborates with schools, youth communities and cultural organizations

[87] Slough Cultural (Arts) Strategy Revised

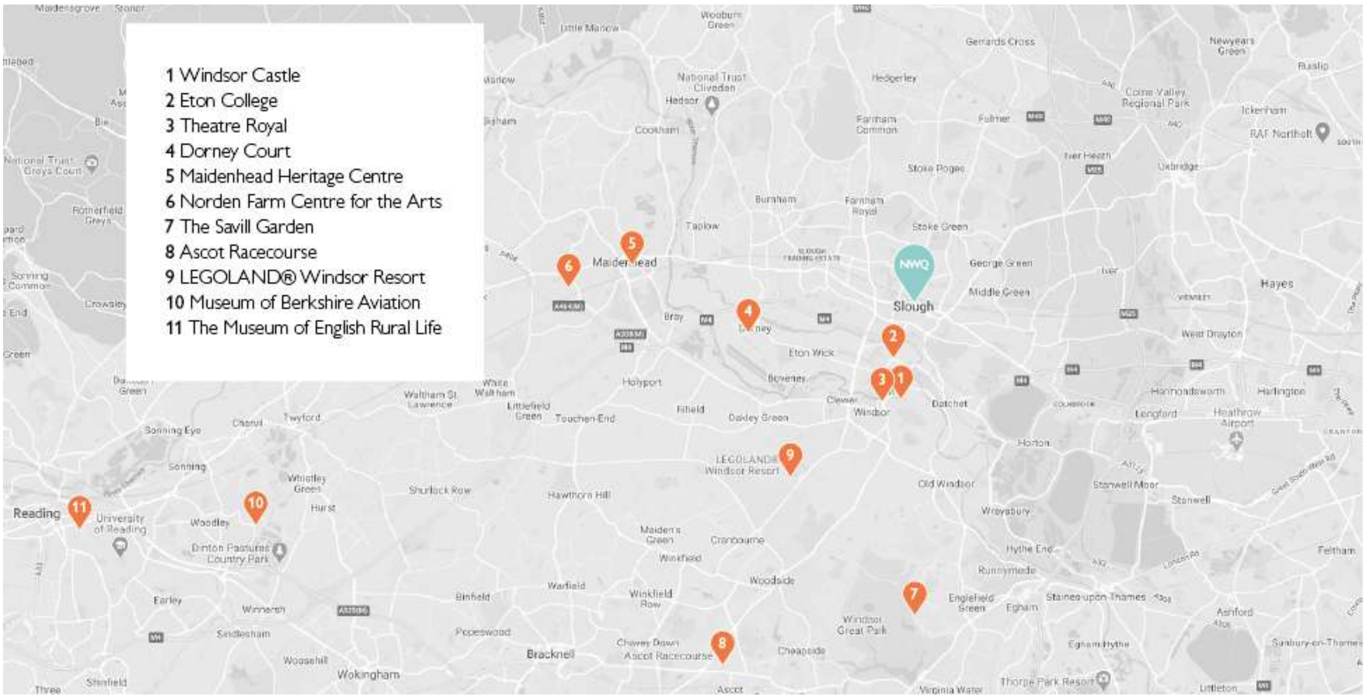
15. Slough Aspire	- Enables young people in and out of education to engage with working professionals and raise their career aspirations
16. Langley Academy	- Promotes Museum Learning
	- St.Mary's Church Centre
17. Arts classes at Langley	- An art centre providing fine art training to local residents

- Slough's cultural facilities are currently limited – key elements being The Curve, a library with a 250-seat performance venue, and Empire Cinema a multiplex cinema
- Key missing elements are: art house cinema, traditional theatre, performance venue/theatre with 500 seats, studios and experimental spaces, active workspace, outdoor cultural activity space
- Despite the lack of cultural assets, Slough has a huge amount of successful cultural organisations both on grassroots and national level
- Grassroot genres are: music, DJ, dance , community arts , etc.

5.7 Cultural Assets in the wider Berkshire

Name	Location	Description	Annual Visitation
Windsor Castle and Frogmore House	Windsor SL4 1NJ	A royal residence for the British royal family originally built in the 11th century CE	1,652,000 in 2018/2019
Eton College	Windsor, Berkshire, SL4 6DW	One of the most prestigious schools in the world, established in the 1440s by King Henry VI	N/A
Theatre Royal Windsor	Thames Street, Windsor, Berkshire, SL4 1PS	A historic Edwardian theatre operating all year round with both classic and modern theatrical works	N/A
Dorney Court	Court Lane, Dorney, Windsor, Berkshire, SL4 6QP	A historic manor house built in the 15th century with a collection of treasures and family portraits	N/A
Maidenhead Heritage Centre	18 Park St, Maidenhead SL6 1SL	A local heritage centre and museum presenting the history of Maidenhead from the Roman period to the present.	N/A
Norden Farm Centre for the Arts	Altwood Rd, Maidenhead SL6 4PF	A theatre and entertainment venue with films, exhibitions, performances, comedy, concerts, shows and art workshops	130,000 annually
The Savill Garden	Wick Ln, Englefield Green, Egham TW20 0UJ	A historic formal garden with ornamental gardens and exotic woodland, it also contains galleries and cafes	N/A
Ascot Racecourse	Ascot, Berkshire, SL5 7JX	Royal Ascot racing takes place throughout the year, with some unique theme days offering summer parties, festivals and fireworks	Almost 600,000 visitors per year
The LEGOLAND, Windsor Resort	Winkfield Road, Windsor, Berkshire, SL4 4AY	A family theme park	2,320,000 in 2018
The Museum of Berkshire Aviation	Mohawk Way, Woodley, READING, Berks, RG5 4UE	Located at the historic site of Woodley airfield, once the centre of a thriving aircraft industry, the museum presents aviation history	N/A

Museum of English Rural Life	University of Reading, Redlands Road, Reading, BERKSHIRE, RG1 5EX	The museum is dedicated to the farming, food, craft, rural life and countryside issues of England.		48,328 for the year 2017 - 2018



5.8 MICE comparators (private hire in Slough/Berkshire)

Name	Location	Total Number of Event Rooms	Range of Size of Rooms (sqm)	Range of Maximum Capacity (person)	Pricing	Hires
Venue @ The Curve	Inside the Curve, SL1 1XY	1		280(180 tiered seats and 100 free standing seats)	£50 per hour for registered community; £59 per hour for private and semi-commercial hire; £80 per hour for commercial hire In-house catering supplier with extra charge for food and beverage	
Gallery @The Curve	Inside the Curve, SL1 1XY	1		50	£15 per hour for registered community; £17.25 per hour for private and semi-commercial hire; £22.50 per hour for commercial hire In-house catering supplier with extra charge for food and beverage	
Meeting rooms @ The Curve	Inside the Curve, SL1 1XY	4		30-60	£7.50 - 20 per hour for registered community; £8.63 - 23 per hour for private and semi-commercial hire; £11.25 - 30 per hour for commercial hire In-house catering supplier with extra	

					charge for food and beverage	
				Wedding halls:300 - 450 each	Wedding packages:	Venue hire only:
				Meeting rooms: 40 each	Premium package: venue hire, drink reception, served meal, soft drinks, table decor, entertainment package, car parking, honeymoon suite room:	Half Day Venue Hire
					£49.00 per guest for a minimum of 400 Adult Guests £54.00 per guest for a minimum of 300 Adult Guests.	Weekday Hire (Mon-Thurs) £5,500 Friday: £6,500 Saturday/Sunday: £8,000
					Excellence package: venue hire, served meal, soft drinks:	
					£37.00 for a minimum of 400 or more guests £40.00 for a minimum of 300 guests.	Restaurant hire:
Baylis House Hotel & Conference Centre	STOKE POGES LANE, SLOUGH, SL1 3PB	3 wedding halls and 3 meeting rooms			Classic package: venue hire, buffet meal:	buffet meal and soft drinks:
					£35.00 for minimum of 100 guests £33.00 for minimum of 150 or more guests	£28.00 for minimum of 40 Guests
						Corporate hire:
						Day rate:
						venue hire, three tea breaks, buffet lunch, notepads and pens, screen, flipchart and marker:
						20 - 79 persons: £47;80 - 149 persons: £44;150 - 250 persons: £40.
						Overnight rate: plus served table dinner, breakfast and en suite rooms:
						from £160
Copthorne Hotel Slough-Windsor	Cippenham Lane Slough Berkshire, United Kingdom SL1 2YE	10	15 - 305.9 sqm	6-350	Day rate: From £38.30 per person	
					Overnight rate: from £152.35 per person	
Haveli Conference & Banqueting	277 High St Slough Berkshire SL1 1BN	1		500	3 course meal, unlimited soft drinks, venue hire, buffet service, onsite parking, dance floor, decoration: from £25 per person	
The Pinewood Hotel	Wexham Park Lane, George Green, Slough Berkshire SL3 6AP	3		250	Basic wedding package: from £2,500 for 60 adult guests, extra guests - £40 per person;	
					Premium package: from £72 per guest	
					Meeting room:	Funeral or christening reception:
Wexham Park Golf Centre	Wexham St, Wexham, Slough, Berkshire SL3 6ND	1		100	Room hire fee: half day £150, full day £225 including projector, flipchart, screen, paper and pencils.	room hire: £150

					£9.95 per person for three services of tea and snacks.	finger buffet from £10 - 12 per person
					Room hire and F&B:	
					£30 per person for room hire, services of tea and buffet lunch, minimum 10 delegates.	Wedding packages:
						from £3,995 on 65 guests, extra guest £10 per head
Amber Lakes Lodge	Welley Road, Staines, United Kingdom, TW19 5EP	1		500	from £9,000 daily	
Stoke Place Hotel	Stoke Green, Slough, United Kingdom, SL2 4HT	5		8 - 200	Wedding packages:	
					20 - 40 guests: £150 per person including room hire;	
					minimum 80 guests: from £110 - 130 per person including room hire	

- There are several venues for meetings, conferences and weddings in Slough
- There is a lack of large capacity venues for 500-700 attendees
- Locally a need for quality new venues – the current offer is very traditional

5.9 Analysis & Conclusion

Slough's current cultural assets are not able to meet all the needs of the local communities. Although the latest cultural building, The Curve, has enhanced the range and availability of spaces, the town still lacks key facilities.

For instance, in Slough there is a very strong music and dance industry with a large youth attendance, however the town has big gaps in high quality rehearsal spaces (e.g. studios and recording spaces) and large performance spaces. Besides, there are not any experimental spaces, galleries and high-quality workspaces for the development of young people or for the support of local talents in arts and creativity.

On the basis of the current gaps, it seems reasonable that the new cultural building will include rehearsal and performing spaces and some cinema capacity as it is assumed that cinema will be provided as part of the Queensmere Shopping Centre regeneration.

6 FUNDING OPPORTUNITIES

6.1 Local infrastructure levies

There are currently two main levies linked to development in England and Wales. These are The Community Infrastructure Levy (CIL) and Section 106 agreements (S106). The key difference between the two levies is primarily the scale on which they aim to deliver infrastructure: CIL is intended to be collected by local authorities to be spent on key strategic infrastructure projects that deliver benefits across an area; whereas, S106 agreements are intended to make development proposals acceptable through the mitigation of specific conditions on a development.[88]

In September 2019, the Ministry of Housing, Communities and Local Government (MHCLG) amended the Community Infrastructure Levy (CIL) Regulations bringing changes for both the CIL and the s106.

6.1.1 Community Infrastructure Levy[89]

The CIL is a fixed charge levied on new development to fund infrastructure. CIL is not intended to pay for the whole cost of infrastructure for an area but it should rather provide a reasonable proportion of capital contributions towards it, where there is an identified need for funding of infrastructure items. Therefore, the expectation is that CIL will be used alongside a variety of funding models required to support the delivery of new infrastructure.

In areas where CIL operates, the levy may be payable on development which creates new or additional internal area, where the gross internal area of new build is 100 square metres or more (the charging schedules and rates section explains how this is calculated). This limit does not apply to new houses or flats and a charge can be levied on a single house or flat of any size.

The levy is not to be paid in the case of:

- development of less than 100 square metres, unless this consists of one or more dwellings and does not meet the self-build criteria below, in which case the levy is payable (see regulation 42 on minor development exemptions)
- buildings into which people do not normally go
- buildings into which people go only intermittently for the purpose of inspecting or maintaining fixed plant or machinery
- structures which are not buildings, such as pylons and wind turbines
- specified types of development which local authorities have decided should be subject to a ‘zero’ rate and specified as such in their charging schedules

The following can be subject to an exemption or relief where the relevant criteria are met, and the correct process is followed:

- residential annexes and extensions where an exemption has been applied for and obtained
- ‘self-build’ houses and flats, which are built by ‘self-builders’, where an exemption has been applied for and obtained
- social housing that meets the relief criteria set out in regulation 49 or 49A (as amended by the 2014 Regulations) and where an exemption has been applied for and obtained
- charitable development that meets the relief criteria set out in regulations 43 to 48 and where an exemption has been applied for and obtained

The CIL is calculated per square metre. The calculation involves multiplying the CIL charging rate by the net chargeable floor area (based on Gross Internal Area), and factoring in an index figure to allow for changes in building costs over time.

[88] Slough Borough Council CIL Advice (2019)
[89] https://www.gov.uk/guidance/community-infrastructure-levy

The adoption of the CIL has increased in recent years. In 2014, 52 local authorities adopted the CIL, while in 2019 this increased to 169 out of 343 total local authorities in England. All the Councils which are adjacent to Slough borough have now either adopted the CIL or produced a Preliminary Draft Charging Schedule (the first consultation stage under the previous Regulations).

6.1.2 Section 106[90]

S106 (Section 106) is the common name of 'planning obligations' or can alternatively be called 'developer contributions' when considered alongside highways contributions and the Community Infrastructure Levy. S106 comprises legal obligations entered into to mitigate the impacts of an unacceptable development proposal and to make it acceptable in planning terms. Planning obligations may only constitute a reason for granting planning permission if they meet requirements to make the development acceptable in planning terms. Therefore, they must be:

- necessary to make the development acceptable in planning terms
- directly related to the development
- fairly and reasonably related in scale and kind to the development

Developers always have to comply with any conditions attached to their planning permission; however, conditions should be kept to a minimum and only imposed where they are necessary, relevant, enforceable, precise and reasonable. Nonetheless, planning obligations should be used where it is not possible to address unacceptable impacts through a planning condition.

Developers may also contribute towards infrastructure by way of the Community Infrastructure Levy. Where the Community Infrastructure Levy is in place for an area, charging authorities should work proactively with developers to ensure they are clear about the authorities' infrastructure needs.

Authorities can choose to pool funding from different routes to fund the same infrastructure. Restrictions on the 'pooling' of Section 106 planning obligations to fund infrastructure are removed. Previously, local authorities were allowed to pool no more than five developer contributions to fund a single infrastructure project; the amendment of the regulations has removed any upper limit on the number of developer contributions that can be pooled.

6.1.3 Infrastructure levies in Slough[91]

Although the CIL is the government's preferred way of funding local infrastructure, Slough Borough Council has not introduced a CIL as it is not currently viable while it finds a S106 approach more suited to the needs of the town.

The strategic development sites in Slough present three key features:

- Slough is a relatively small administrative area. There is little room for expansion of the town to meet forecast needs without such development falling into neighbouring authority areas. This has been considered for future residential development of Slough by the Council. Because of the heavily built up nature of the borough, the development of future houses will require significant urban renewal, and town centre regeneration / brownfield development tends to be a less viable and more challenging development to deliver
- That the vast majority of the sites include residential uses. However, residential uses are envisaged to come forward with a wide range of other mixed uses and many of these other uses are unlikely to be viable (for example leisure, employment, community and infrastructure)
- There are no greenfield sites. Greenfield sites are those sites which have a low or no existing use value. The sites in Slough are very likely to be brownfield sites, which means that they have higher existing use values (for instance the sites include a former hospital, gas works, bus depot, fire station and post office sites / uses). These value factors negatively impact on scheme viability

According to Slough Borough Council, it would be very challenging to set an effective and fair CIL rate in Slough given the locational aspects of the borough and the variety of brownfield key sites coming forward. In some cases, the presence of a CIL could make a scheme unviable. Instead, an S106 Agreement approach in Slough

[90] https://www.gov.uk/guidance/planning-obligations
[91] Slough Borough Council CIL Advice (2019)

would provide more flexibility in terms of allowing site specific negotiations which help to ensure sites remain viable, whilst still being acceptable in planning terms. Furthermore, a CIL would be likely to have an adverse effect on the supply of affordable housing via the planning system, while retention of Section 106 planning obligations has hopefully contributed to the supply of new housing[92].

6.2 Business Improvement District

A BID (Business Improvement District) is a business-led and business-funded body formed to improve a defined commercial area through the charge of a levy on all business rate payers in addition to the business rates bill.

This levy is used to develop projects which will benefit businesses in the local area. There is no limit on what projects or services can be provided through a Business Improvement District. The only requirement is that it should be something that is in addition to services provided by local authorities. Improvements may include, but are not limited to, extra safety / security, cleansing and environmental measures.

Since 2005, over 300 BIDs have been formed in the UK. In her report to the government on the state of Britain's high streets, Mary Portas identified BIDs as key players in the transformation of those places where they operate. The key benefits of BIDs include:

- A BID can only be formed after extensive consultation and a ballot of businesses
- BID levy money is ring-fenced for use only in the BID area
- Businesses decide and direct what they want for the area
- A BID manager is appointed to engage and promote business needs, including event management
- Co-ordination to attract visitors to the area
- Business cost reduction, reduced crime and increased footfall
- Help in dealing with the Local Council, the police and other public bodies
- Increased footfall and improvements in staff retention
- Promotion and branding of the area to attract new customers
- Facilitated networking opportunities with the area and neighbouring businesses

6.2.1 Slough BID

A BID will be implemented in Slough starting from April 2020. Key themes such as working to prevent crime and anti-social behaviour; marketing and improving the reputation of Slough and the town centre through advertising and promotion of events and schemes; and providing additional support to local traders can only be beneficial to businesses in Slough and to Slough as a whole.

[92] Slough Housing Delivery Action Plan 2019

Figure: Slough BID Boundary

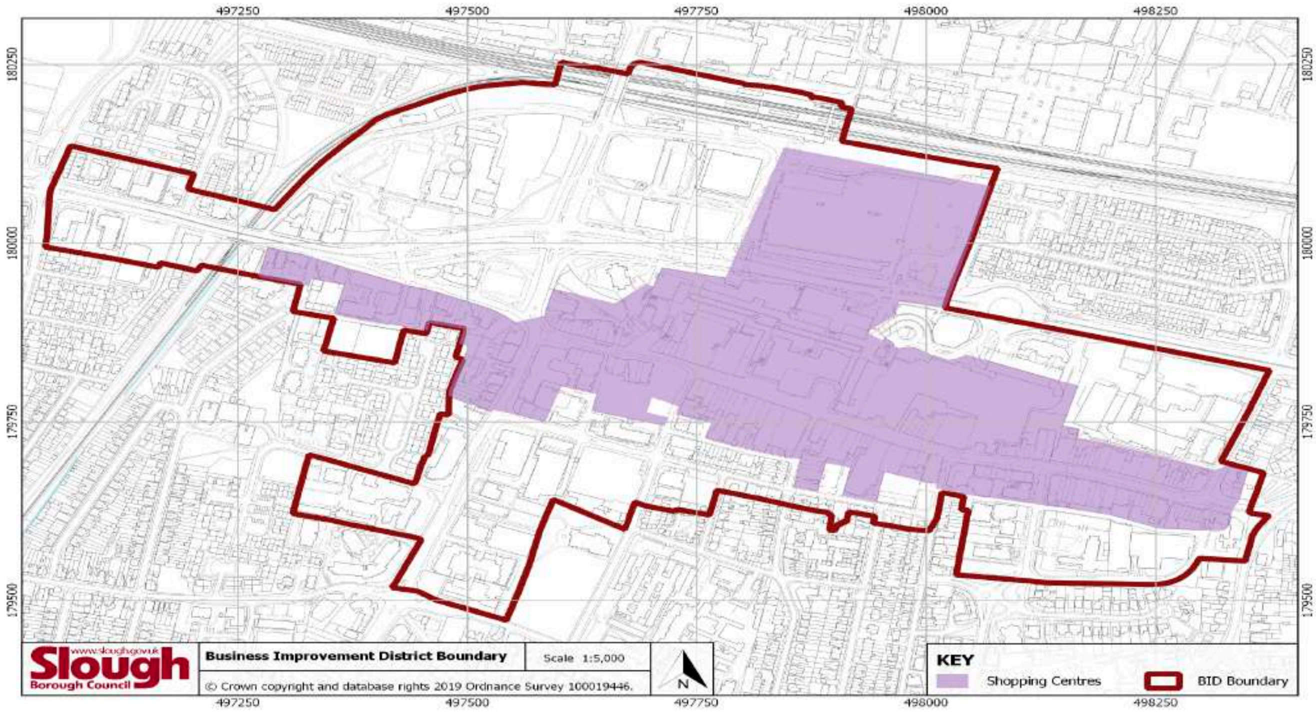


Table: Plan of projects to be delivered (Slough BID Business Plan, 2019)

Project	Description	Scope	Budget per year
Safe and Secure	- encourage the update and expansion of the Pubwatch Radio Scheme	- tackle crime and anti-social behaviour	£160,000
	- implement 'banned from one, banned from all' principle for those perpetrating crime and anti-social behaviour	- reduce shoplifting and cybercrime	
	- fund a full-time 'Town Team' to enforce restrictions on drinking in the town centre and other non-criminal offences	- make Slough town centre feel a welcoming and safe environment	
	- extensive CCTV coverage		
	- build relationship across all levels of policing		
Environment	- support additional street cleaning in Slough town centre, aspiring to a principle of "everything clean, everything working", additional to Council provision	- creating a clean, safe and welcoming environment	£92,000
	- act as facilitator for businesses to ensure authorities dealing with specific services according to their needs (i.e. waste removal)		
	- financially support changes in the town centre (i.e. increase street lighting)		
	- enhance signs approaching Slough and in the town centre		
Marketing and Events	- use branding principles across all channels to create a consistent positive message to customer and investors	- ameliorate Slough reputation	£96,000

	- building a new fully	- showing Slough as a vibrant, diverse and modern environment	
	mobile-responsive, customer-facing website		
	that includes an events calendar, business		
	listings and “brochureware”		
	- establish social media channels to support and promote the town while sharing business news, events and offers		
	- advertising budget to promote events and other town assets		
	- organise and support a range of events in the town centre to bring customers		
Business support	- support businesses to aim for higher standards and introduce business excellence awards to celebrate success	- strengthen the business community through networking and training opportunities	£36,000
	- To help businesses reduce their running costs, Slough BID will trial a joint procurement scheme for utilities and other services		
	- trial the introduction of a customer loyalty scheme across the town centre, with the aim of increasing customer dwell time, spend, and return visits		
	- work with Slough Borough Council and others to develop data collection about footfall and movement of customers in the BID area and use the data for planning, promotion, and performance monitoring		
Representation	- build close relationships with other stakeholders in the town (i.e. Slough Borough Council, Thames Valley Police and the Thames Valley Chamber of Commerce) to be represented on decisions about the town centre	- provide an active voice for the business community of Slough Town Centre	No specific budget, as the project will run through all of the BIDs work

6.2.1.1 Levy Rules

The levy rate to be paid by each property or hereditament is to be calculated as 1.25% of its rateable value on 1st April each year. Tenants of shopping centres or businesses that otherwise pay a management fee for service charges will pay a discounted levy of 0.75% of the rateable value.

All properties or hereditaments with a rateable value of £10,000 or more will be eligible for payment of the levy. The BID levy for properties with a rateable value greater than £1 million, will be capped at a levy of £15,000. Where one levy payer is responsible for more than one property or hereditament, where the aggregate levy of those properties totals more than £15,000, the levy payer will be eligible to apply to the BID Board for the same cap to be applied.

A guaranteed cap of £30,000 is likely to be applied to the liability for empty properties at the Queensmere Observatory Shopping Centre, which will be demolished by the end of the first 5-year term of the BID.

Properties or hereditaments with a rateable value below the threshold can opt to pay voluntarily the minimum amount of £125 per year (plus VAT) to become a voluntary member of the BID and receive the same benefits as ordinary levy payers, with the exception of being able to vote in the BID ballot or becoming BID board directors.

The number of properties or hereditaments liable for the levy is approximately 442. This figure may change during the BID term with change of use, building or demolition. The total levy expected to be invoiced will be £410,000 per year. BIDs can expect to collect 95% of the invoiced amount, so we will budget on levy income of £389,000 per year.

Based on the Rating List for the BID area, most businesses will pay less than £10 per week and many will pay much less. The BID levy for most businesses in Slough would be 1.25%, raising a levy income of more than £400,000 annually over 5 years. BIDs can then attract additional funding from other sources. The chart indicates how much this will cost to businesses at the maximum 1.25% levy.

Table: BID's cost to businesses

Rateable Value	Pounds per year	Pounds per week	Pound per day
£10,000	£125	£2.40	£0.34
£20,000	£250	£4.80	£0.68
£50,000	£625	£12.02	£17.00
£100,000	£1,250	£24.03	£3.43
£1 million	£12,500	£240.38	£34.34
Cap	£15,000	£288.46	£41.20

6.2.1.2 Levy Collection

The levy will be charged annually in advance for each chargeable period. Charging periods will align with the rules used by Slough Borough Council for business rates. Collection of the BID levy carries the same enforcement weight as collection of nondomestic rates. The levy will be collected on behalf of the BID by Slough Borough Council, which will charge the BID £35 per hereditament of the levy for collection and to manage legal proceedings in the event of non-payment.

Exemptions, relief or discounts prescribed in the Non-Domestic Rating (Collection and Enforcement) (Local Lists) Regulations 1989 made under the Local Government Finance Act 1988, will not apply. Those responsible for unoccupied and part occupied rateable properties, and BID levy payers who are charities or non-profit making organisations, will be liable for the full BID levy. Charities in receipt of 100% relief can apply to the Slough BID Board for an exemption.

6.2.1.3 Budgets

Slough BID is budgeting for an expected levy income of £389,000 per year. It also expects to leverage additional expenditure of £40,000 (about 10% of the levy) per year, giving a total of £429,000 per year, £2,145,000 over the five-year term of the BID. The plan is to carry a contingency fund of £35,000 through the five-year term.

6.2.2 Tourism BIDs

Another alternative to a tourism levy would be a Tourism BID[93]. A BID has recently been approved by local businesses in Slough. BIDs raise a modest levy on local business rates to spend on initiatives to improve the business environment of a local area such as public realm improvements or promotional campaigns.

Tourist BIDs, or T-BIDs as they are known in the US, are a version of a standard BID. Rather than being geographically specific they cover a larger 'visitor economy' across a whole town, city or region, and are devoted to promoting the area to visitors. T-BIDs were first piloted in West Hollywood in 1992 and there are now more than 60 in California alone.

[93] See Centre for London, 'An alternative to a tourism tax'– A T-BID. Ben Rogers, 4th June 2013,

In 2014, the UK's first T-BID was established when six Highland Council wards voted to establish the Loch Ness and Inverness Tourism BID. In July 2016, the proposal to establish a TBID in Torbay was approved after a majority of eligible tourism businesses voted in favour of its creation.

There remains a risk that a T-BID would be opposed by segments of the industry who could view it as a tourism levy by 'stealth'. Moreover, its coverage may be more partial than that of a tax or levy as it could be difficult to apply to smaller non-serviced accommodation providers.

6.3 Other levies

6.3.1 Tourism levy[94]

Slough's location near Heathrow attracts global businesses and their workers. The inbound tourism sector already makes an important contribution to Slough's economy as expenditure by foreign tourists provides an injection of income into the economy, and this in turn creates jobs and economic output. Many European and global cities impose tourism taxes or levies; Paris imposes a tax per person per night of between €0.65 to €4.40 depending on the class of accommodation. Berlin charges five per cent of the accommodation cost. Lisbon charges a flat €1 per person per night. However, these taxes are offset to varying degrees by lower rates of VAT on hotel accommodation, whilst the standard rate of 20 per cent is charged in the UK.

When introducing a tax or levy of any form, due consideration needs to be given to the potential effects on behaviour that may follow as a result. At the margin, a tourism levy on hotel accommodation would be expected to increase prices and reduce demand and thus negatively impact the attractiveness for foreign companies to relocate to Slough.

The potential for a tourism tax in the United Kingdom was raised in the 2007 Lyons Inquiry into Local Government. Lyons recommended that while a blanket tourism tax for the UK was not appropriate, the government should consider legislating to allow some local authorities to introduce a tourism tax where appropriate. This was not considered by the then Labour government. The introduction of a tourism levy needs to be approved by the government.

Revenues raised could be used to support the cultural sector and for education and training purposes.

6.3.2 Cultural Levy

Local culture and arts could be boosted by the implementation of a Cultural Levy. Slough Borough Council could negotiate a percentage of annual business rates to invest into culture, as it would be counted as a local priority as much as others that are agreed with the Berkshire authorities. Slough had an increase on its business rate collection of £1.4 million in 2018/19 and an increase is expected in the next 10 years; this increasing resource could extend to cover culture. For instance, Luton Culture Trust receives an annual amount from the business rates at Luton Airport – for the year ended 31st March 2018, this amounted to £2,754,000 of unrestricted funds. Slough may be in a position to establish a similar arrangement with Heathrow Airport.

6.3.3 Future High Street Fund[95]

High streets lie at the heart of our communities and local economies, creating jobs, nurturing small businesses and injecting billions of pounds into our economy. But the way we shop and the way that communities use their high streets is changing: we're shopping more online, making fewer big shopping trips and shopping 'little and more often'. This changes the nature of what makes a high street successful. Evidence shows that high streets with a wide choice alongside well designed and planned residential and office space are more resilient to these changes and are adapting more successfully. In contrast, high streets that rely heavily on traditional retail without sufficient office space and housing surrounding the high street have found it harder to adapt to these changes and tend to be the ones that are struggling.

[94] Lyons, M. (2007) 'The Lyons Inquiry into Local Government'
[95] https://www.gov.uk/government/publications/future-high-streets-fund/future-high-street-fund

A £675 million Future High Street Fund was set up in 2018 by the Secretary of State for Housing, Communities and Local Government. It was created to serve two main purposes:

- To support local areas to prepare long-term strategies for their high streets and town centres, including funding a new High Streets Taskforce to provide expertise and hands-on support to local areas.
- To co-fund with local areas projects including:
    - investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town / city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace development and existing local communities, and the regeneration of heritage high streets
    - investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units

Although time for proposals ended in early 2019, in August last year the Prime Minister Boris Johnson confirmed an additional £325 million to the Future High Street Fund to benefit 50 towns. Therefore, the overall fund will be taken to £1 billion, as the Government looks to drive forward local growth.

6.4 Local Enterprise Partnership

Thames Valley Berkshire Local Enterprise Partnership is a business-led, multi-sector partnership mandated by the government to lead activities that drive local economic growth. To date it has secured and allocated £182m of UK and European public funds to deliver a wide range of initiatives in the Thames Valley Berkshire area.

6.5 Arts Council England

National Lottery Project Grants (£100,000 and over) funds projects that give opportunities for people to benefit from creativity and culture.

- Capital (buildings) projects support building development work
- Children, young people and learning projects support artistic and cultural activity which takes place in formal and informal settings for children and young people, for example an arts or community venue or a museum.
- Creative media and digital activity projects support organisations showing innovation, experimentation and creative risk-taking, and with clear plans for reaching audiences effectively

Development Funds will focus on diversity, resilience, innovation in business models, leadership development and creating more pathways for a wider range of people to become part of the arts and culture sector.

6.6 National Lottery Community Fund

The Partnerships programme offers a larger amount of funding - £1,000,000 - for organisations that work together with a shared set of goals to help their community thrive – whether that's a community living in the same area, or people with similar interests or life experiences.

The Fund focuses on projects that:

- bring people together and build strong relationships in and across communities
- improve the places and spaces that matter to communities
- help more people to reach their potential, by supporting them at the earliest possible stage

6.7 Other Funding

Various foundations support organisations with Revenue and Capital grants to support the cultural sector, and in particular cultural learning and performing arts spaces.

Examples of such foundations include:

- Garfield Weston Foundation - awards grants for community, arts and education projects
- The Clore Duffield Foundation - a particular focus on cultural learning and on museum, heritage and performing arts learning spaces

Corporate sponsorship - businesses can sponsor a project or activity. Bespoke packages can be tailored to business objectives, providing brand awareness, audience access, product showcasing, staff engagement, opportunities for social investment, creative marketing etc.

SBC can also realise funding from housing related long-term loan finance, which can be accessed via HRA. Cultural infrastructure could be included in a package as it is essential to the success of a regeneration scheme.

7 DIRECTION OF TRAVEL

Slough has a big opportunity for a game changing project, within the context of the world class development proposals, which will propel the borough towards being a vital future city. The risk in this context is that the opportunity isn't fully embraced, as the alignment of agendas and possible deep impacts is both exciting and palpable.

The emergent concept envisions a new and needs-driven cultural institution powered by learning, knowledge, and diversity. Not only would the site be the key anchor in the North West Quadrant, but it would also fully integrate a new Higher Education partner – which will be essential for its success and impact in the local economy. The current lack of Higher Education provision in the town could be addressed through a powerful partnership with Royal Holloway and the University of London, and with the Creative Academy.

This new place is at the heart of the cultural and economic ecosystem and, thanks to its accessibility, it represents a new living 'room' for the town. Consequently, the project aims to use the cultural legacy of the area to create a pipeline of talent and creative experiences for all people. It will inspire people and offer them opportunities that will be supported, incubated, and accelerated in order to tackle the needs of young people and businesses, and to create a cohesive and culturally aware community.

At the heart of the project, a new and innovative partnership will create deep impacts by bringing together culture, learning, economy, health and wellbeing. This partnership will also work with the emergent 'Cultural Trust' which will be part of the crucial development of the cultural strategy. Therefore, the project will be a massive step change in Slough's cultural provision: it will allow a step up to 'world class' and it will bring the appropriate infrastructure to transform the town into a real cultural city.

7.1 Economic & social needs

Slough is evolving rapidly, thanks to the vibrant urban and cultural strategies Slough Borough Council has started to develop and implement. However, there are still many issues that need to be addressed to create a holistically successful city. Regarding economic context, businesses are reporting skills shortage while the town has difficulties in attracting and retaining staff and workforce. There is a strong desire for a more attractive 'package' in terms of Slough Town Centre and facilities, particularly for innovation spaces that would attract and sustain start-ups. New facilities are also needed to respond to economic development of the digital and creative industries. Businesses have a general priority to ensure wellbeing for workers. Slough's social and cultural context is also very rich – a hugely diverse and very young community. The town is currently not able to fully engage with all existing local communities and their needs. A real and essential priority is young people: as they represent the future workforce and therefore should be engaged appropriately. Accordingly, there is a desire for higher education offer aimed at adults and young people.

7.1.1 Cultural needs

The recent project of The Curve and HOME Slough are successfully addressing some of the borough's cultural needs. However, Slough still shows with some key and essential gaps in its cultural provision, such as a museum site, an art house cinema, a large performance venue/a theatre with 500 seats, high-quality studios and experimental spaces, active workspaces, and outdoor cultural activity spaces. Given the vibrant cultural scene around dance, music and community arts, there is a clear need for these spaces.

The emergent Cultural Strategy includes the opportunity to develop a place that could deliver these elements, this place can be within the North West Quadrant area. The site could also serve as an essential 'HQ' for Slough Culture – as an example Home Slough and the Creative Academy would add significant value and direct connections with audiences. Besides, the site could also be a base for the award winning Rifco Theatre – who are looking to return 'home' to the town.

7.1.2 Who is the future audience?

The project envisages a wide audience – but its highest priority is the ecosystem of Slough – youth, diverse communities, business. The following table expresses the audience and impacts:

Young people A truly accessible barrier-free place for training, knowledge, experimentation, skills enhancement, a new HE offer	New entrepreneurs A place to start / incubate a business that can have a future impact, space for acceleration, a digital and creative business focus	Developing businesses A place that supports businesses, diversifies the economy, and lowers failure rate	For established business Talent pipeline from the local community meeting business needs, wellbeing for employees, identity for business through connection with quality,
For schools Exceptional cultural resources, a schools' programme, place of inspiration and pathways to careers and work	University Partners An exceptional nationally significant project, integrates culture / learning / business and wellbeing, potentially a new model, direct local	For the Cultural sector A palette of spaces, a cultural quarter, a place for programmes and partnerships, addresses the big needs in Slough, delivers fully (and extends impact) on ACE	The community A cultural living room for all communities, where diversity is celebrated, where opportunities for social and economic mobility are clear and available,

7.2 A powerful new cultural building: structure and sustainability

Two key options have emerged in the masterplan development for the NWQ. The multi-functional site will include educational and cultural facilities, these spaces could be either divided into two different buildings or be co-located within one single building. There is a clear preference and case for a single building option, being more appropriate as it shows more benefits.

Pros and Cons with One Building

+

- Creates a busier, more vibrant place, all day / night time
- Mixed use often leads to more collaboration and partnership
- Feels closer to the 'vision' to co-locate
- Co-location more a cultural quarter model than a 'dispersed campus' model (even if there is close

–

- Less flexible into the future potentially – expansion could be limited by space
- Operation possibly shared, but can be managed

Pros and Cons with Two Buildings

+	-
• Parties manage own estate – simpler • Legally simpler, single ownership • Easier to manage growth • Funding potentially more discrete	• Less cohesion between entities / partners • No economies of scale in operation • Potentially feels less vibrant • Use patterns perhaps don't support income generation / night time economy • Two buildings don't support maximising the land value

The potential space usage has also been analysed, while taking into consideration the current cultural assets and infrastructure, and the needs in Slough.

In Slough there is a strong need for a large-scale venue to accommodate private hires, weddings, business events, university events (e.g. graduation). Slough could support a 1,000-seat venue: the Adelphi Theatre's development could fulfil that need. Further work is required to test viability, but the population statistics support this emergent option.

Calculations based on Independent Cinema Organisation methodology indicates that Slough can support a 10-screen cinema (multiplex model) based on its population projections. This is currently delivered at the Empire – and we believe future provision should be delivered by the private sector as part of the town centre regeneration.

Therefore, the allocation of spaces within the new cultural building for the North West Quadrant reflects this. The vision for the new site includes adaptable, vibrant and lively spaces with programmes and activities. The building should be a space where people are willing to go to see performances but also to eat, to work or to hold private events. The new building should be will be a 'living room' for the diverse communities of Slough: it has the possibility of a very mixed economy, and a mixed and creative programme.

7.3 Potential for partnerships

A strong cultural and learning ecology already exists in Slough but it needs direction – recent consultation indicated "all the parts of the orchestra are there - but there is no conductor". Therefore, a dynamic new partnership model is needed for the future to harness the significant energy. Such partnership should meet the following criteria:

- It must respond to the lack of higher education in the town, which has also been addressed together with the University of London and the Royal Holloway University
- It must engage different players (e.g. Pinewood Studios, NHS, Home Slough, Creative Academy etc)
- It should consider the plan for a new cultural trust, but could be highly progressive
- It must have a set of shared outcomes
- Its structure must have strong vision and leadership
- It should be able to foresee the future with evolved and expanded partnership model
- It should allow a shift towards a model where culture and wellbeing is absolutely central.

The following table summarises the key differences between Slough Borough Council being on its own and the implementation of a partnership.

Comparison of SBC 'on own' or 'partnership'	SBC 'on own' approach	Partnership approach
Influence	More control	Shared responsibility, less siloed, more connected
Risk	Higher risk - lower impact	Lower risk - exponential impact
Perception	Possible barriers to integration with wider sector, business, learning - seen as not integrated enough	More gravitas and collaborative credibility with strategic agencies / government / ACE / business / ERDF / AHRC etc
Masterplan	A solid project - but not a real anchor for NWQ or Slough	Creates a true anchor project given wider / deeper remit
Learning Impact	SBC doesn't have the resource to meet the learning needs for business / community	Integrated in pre-existing academic learning networks, easier to create, high profile, integration of strategic plans
Funding	Limited palette of funds	Broader access through partnership
Costs	Emphasis on SBC	Shared costs with founding partners
Integration/Networks	Building on SBC's existing network	Shared network with founding partners - wider, more powerful, more integrated

7.4 Funding opportunities

Currently, it is clear that there are a number of possible funding opportunities. These can differ according to the partnership approach that will be implemented:

SBC 'on own' approach	Partnership approach
CiL/S106	Partner's own funds
SBC's own funds / investment options (e.g. linked to Housing)	Wider education funding
Arts Council	AHRC
Heritage Fund	ERDF
Local Enterprise Partnership	Business / industry
Business / industry	Individuals / donors
Health funds (linked to wellness)	
Abu Dhabi Investment Authority	

7.5 Future Governance

For the project to be a success it needs a strong vision to be delivered by highly strategic founding partners. The following tables expresses an emergent structure.

Model	High-powered, influential Partnership Board - directing a big vision
Chair:	High profile individual
Foundational Partners:	EG: SBC, UoL, RH, NHS, high profile business
Value generators (not representative - active):	Developers, wider business community, community, learning, cultural trust – adding value through connectivity
Influencers:	Expert input (creativity, learning, other cities, academics…)

It can then establish a framework around the key impacts that Slough needs to create.

Model	Effective Cultural / Skills Delivery Framework - highly focused, managing energy
Chair:	Connected local professional
Partners:	Full range of community, cultural, museum, arts, business, academic etc
Delivery areas (Shared Outcomes) through partners:	Through thematic areas e.g.: 1. Access to opportunities, 2. Talent pipeline development, 3. Wellbeing & workforce, 4. Specific area-based focus (deprivation), 5. Identity.

This is supported by the Cultural Strategy and would also partner the possible 'Cultural Trust' that is part of the plan for the future.

7.6 Emergent Shape of the Building

Overall, there is a palpable opportunity for the development of a highly innovative and new cultural building, that would also support learning and education. Slough could be an exemplar for the innovative provision of culture for a 'city of the future'.

The new building will be really dynamic, high quality, fluid environment with future-focused cultural space, where all the spaces support each other. It will be a very democratic and open site where all people can see the work taking place, and can derive pride. It is also suggested that the building is developed through a competitive process – which will have the benefit of raising profile, creating momentum, and communicate a strong vision. It is essential that the site is an integral part of the positioning of Slough as a cultural city.

The new building will be a catalyst particularly for young people, educational programmes and innovation workspaces. It will also be the fertile 'soil' for higher education partnership while supporting Slough's educational competitiveness and driving the talent pipeline. Learning and workspaces will be developed to create synergies, to create innovation hubs to enhance learning and mobility and support small business and start-ups.

The building will become a cultural 'jewel box': by connecting set of places, projects and cultural elements, it will respond directly to Slough's huge youth and diversity context.

7.6.1 Emerging Area Schedule

In terms of a direction of travel, an emergent area schedule has been developed to give some definition to the project. This will be further developed, particularly in regard to the options for space beyond the core cultural and higher education space. There is also further work to be done with the partners to refine the schedule for the HE spaces.

New Cultural Space	m^2	
Lobby/Arrival	200	Permeable
Bar/Café	250	including 40% BoH
Toilets	100	Over several levels
Main auditorium incl stage and orchestra pit with full height flying	600	500-525seats
Main Auditorium Storage	25	
Green rooms x 3	75	
Black box studio, retractable seating	200	125 seats
Temporary exhibition	350	

Temporary exhibition storage	100	
20 mixed use studios/rehearsal rooms, recording, mastering suite, visual, AR	300	
Immersive cinema	200	150 seats, projections on three walls
Incubation/Acceleration	500	including reception, breakout spaces, booths, meeting rooms, small offices, co-working desk space
Innovation / MIT Lab space	150	30-40 persons
Creative partners office	300	Admin hub for SBC and partners
Story of Slough/Flexible gallery	200	Dynamic interpretive space
Museum storage	200	Open, linked to above
Roof top café/bar	150	Comparators: Netil360 (London), Stadpark DÂK (Rotterdam)
Creative Academy spaces		
6+ studios	800	Sprung floor and mirrors, some double height
Open plan area for staff with hot desking and some meeting rooms	100	
Locker/changing rooms	100	
NET	**4,900**	
Circulation/Plant	**1,225**	**25%**
Total GFA	**6,125**	

University Requirements - co-located with above in single building	m^2	To be further defined
Grow from 300 to 1.000 students over 10 years		
Classrooms		Seating 30 students
Computer labs		Seating 60 students
Break out spaces/co-working spaces		
Small library		
Reception/Arrival		
Open plan area for staff with hot desking and plenty of meeting rooms for student consultation.		
NET	**3,300**	
Circulation/Plant	**825**	**25%**
Total GFA	**4,125**	

CULTURAL + UNIVERSITY GFA	**10,250**	**On this basis there is c.5000m2 of space for other opportunities**

Other potential use options	m^2	To be further tested, could be a mix of these functions
Large Innovation/Incubation/Acceleration space with test facilities and office space		Part of an enterprise network collaborating with students, start-ups, researchers and other innovative technical/creative companies. Common meeting rooms, reception and entrance. Space with high tech prototype and test facilities and office space.
Student / live work		The lack of student accommodation will be emphasised by the introduction of HE students and growth of Creative Academy

Co-Living for young professionals / and / or older people		Co-living that combines thoughtfully designed private space with one-of-a-kind amenities, shared spaces, a cultural events programme and co-working spaces. Comparator: The Collective Old Oak, Co-Living Spaces Hove
A new Cultural Creative Academy		Space to develop a new sixth form academy for creatives in the building, innovative new courses, linked to universities
Commercial workspace		Purely commercial space, used as an endowment for the project, developing incomes for the site operation and programme

7.6.2 Loading / Get in

The project will create a mixed-use cultural centre, so there are some practical elements to this for consideration in the masterplan. The ideal get-in route consisting of external parking and loading bay, internal scene dock and stage is linear. The objective should be to have the loading bay, the scene dock and stage all on the same level which facilitates a speedy and easier 'get-in' - more popular with touring crews making unloading and loading smooth especially if inclement outside. A hydraulic dock leveller (maximum slope of 1:8) should be provided if the loading bay floor height is not level with or lower than the typical lorry height. Any slope should not exceed 5 degrees for a 45ft lorry trailer. A smoother get-in set-up can have a positive cost-effective influence on scheduling of programme, staff, rehearsal time and the quantity of productions being presented. Overall dimensions of a 45' truck are: 13.7m l x 2.6m w x 4.0-4.4m h.

Consideration must be given to the proposed arrangements for the arrival of large vehicles and their positioning to the loading bay including for a second large truck. The manoeuvring of the truck will be dependent on the trailer axle configuration and location and so these tolerances must be taken into consideration. A 3.5 tonne truck has a typical floor height of 940mm; a 7.5tonne lorry has a typical floor height 1200mm. 45ft trailers have a variable floor height 1200mm-1450mm.

Typical items that can pass through a get-in route include 12m long rolled cloths or lighting bars; 7.5m x 2.3m framed flats, heavy rolling road boxes, 1.5m x 0.75m carts and dollys, larger musical instruments, stage weights, loose cables, equipment and staging. This get in could also serve exhibition turnaround, plus integrate waste and recycling functions, plus deliveries.

It is also useful to note that based on initial modelling of the site's use, there could be a need to ensure that the surrounding area could accommodate 300 car parking spaces – although the overarching vision is to promote green transport modes.

7.6.3 Other elements for the emerging brief

- It is essential that the inside of the building is visible outside – so activities are on display
- Permeability on more than one elevation would connect the building better with the surrounding landscape
- The North West Quadrant system of paths and wayfinding leads to the new building intuitively
- There is a clear connection with The Curve on the opposite side of the road – which could create a sense of linkage and connectivity to the Curve and then the High Street beyond
- Sightlines should be clear to the site from the hotel building
- Wayfinding to the rail station, plus bus stops in close proximity
- Ideally the surrounding public realm would encourage dwell, seating, and space for outdoor performance – linked to the new building
- The possibility of projection onto the façade for film etc, would create some opportunity for programme and activation

8 NEXT STEPS

The Situation Analysis is a living document and will be further refined. The following phase is the Options Appraisal during which Barker Langham will test and compare models:

- Standalone cultural facility
- New model cultural and learning hub
- New model cultural and learning hub + ‘opportunity’ space of different types
- Governance models

In order to refine and develop the models Barker Langham will continue with stakeholder engagement, i.e. discussions with Creative Academy, Royal Holloway University and the University of London.

9 APPENDIX

9.1 Forum Groningen

9.1.1 Introduction

The Forum Groningen is a mixed-use cultural centre situated in the historic centre of Groningen; a university city located about 200 km north of Amsterdam. Opened in November 2019, the Forum is a brand-new building which offers an extremely rich variety of high-quality spaces and responds to the different needs of many in the local community, from businesses to young people.

Forum Groningen's mission is to be the crossroads of the city - a place where everything comes together, and everything happens. Forum is designed for the future and aims to respond to the current and future needs of the population.

The Forum Groningen was a part of a larger municipal project with a total investment of approximately 275 million euros. The Council of Groningen has invested approximately 148 million of this 275 million in municipal real estate, including the Forum (101 million), the car park (43 million) and the bicycle parking (4 million). The construction of the building was delayed by two years because of an earthquake which made it necessary to stop the construction and start it again to provide a safer structure. If the initial investment plan for the Forum was around £70 million, the government had to add £70 million to solve the structural issue.

9.1.2 Context

The project of the Forum Groningen started early in the millennium as a response to an urban planning need rather than to a cultural demand. At that time, the centre of Groningen was no longer the city's hub, and an analysis of people's walking roots showed that locals tended to avoid the city centre while the opening of a big shopping area on one side of the city supported this tendency. As a result, the city centre area became unsafe and unwelcoming.

The Council therefore wanted to implement a plan to regain the city centre and give it impetus. The main goal was to provide a constant traffic of people in the city centre, attracting people both during the day and at night. The idea of a multi-functional building was developed: a library would attract people throughout the day; a theatre would replace an existing one situated in the centre, which was demolished to create the Forum; cafés and restaurants would provide the community with gathering places; and other flexible spaces could accommodate many other needs.

The local population was highly involved in the development of the Forum Groningen. It was a democratic process from the outset. The public were invited to vote on options for the building, with 53% of those attending selecting the same building that was chosen by the jury of specialists convened to evaluate the options. However, overall the democratic process presented some issues: people were very negative about the building and had problems with the discussion around the alternatives because of difficulty in understanding visions and visualizing spaces.

9.1.3 Governance

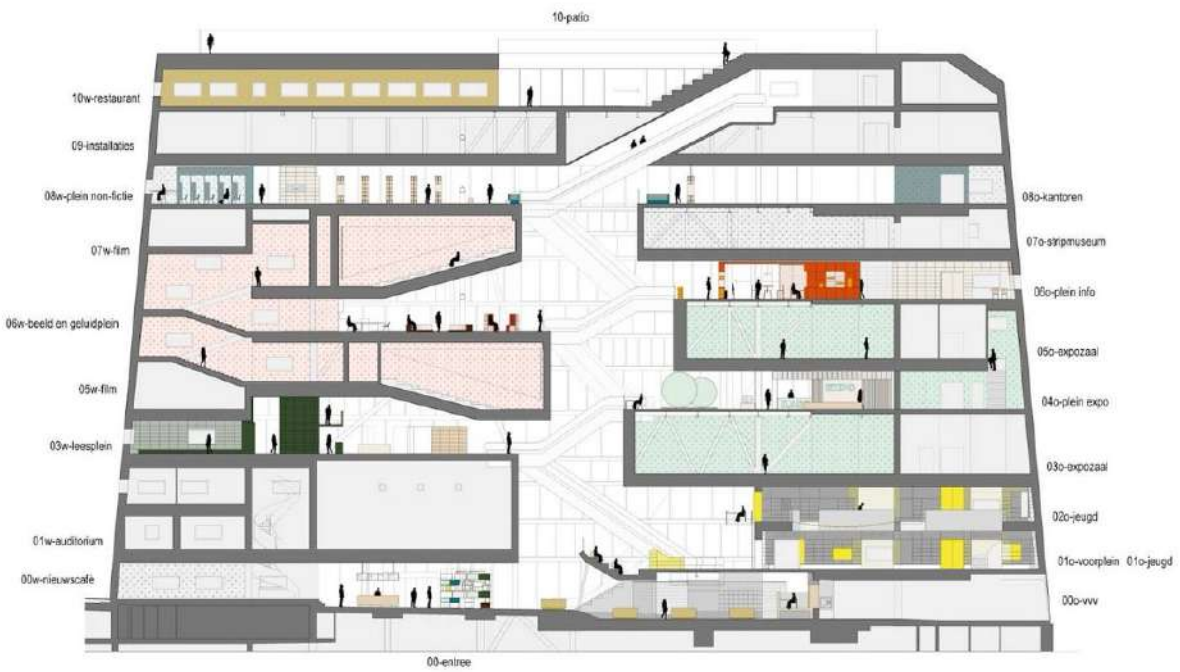
The Forum Groningen derives from the gathering of various pre-existing organisations - the library, the theatre and the cinema. Nonetheless, according to the organisational organogram, there is only one Director at the head of one integrated and flat organization. The current Director's intention was to renew the governance structure in order to combine the three organizations in one with the purpose of avoiding internal conflicts among many directors. The integration of the previous organisations allows for more flexible use of internal resources as well as a total operational saving of around £1 million. Having one single director ensures a more cohesive and coherent agenda throughout the different programs.

9.1.4 Summary of spaces / facilities

The Forum Groningen is a building of 17,000 m2 with a total height of 45 metres, which includes ten floors and a rooftop terrace. Although it appears to be one united block of building, it is made up of two towers connected internally by escalators that criss-cross through the building. It includes closed and open areas. The vision behind the architecture is that of enabling integration: the spaces are not allocated according to functional uses, but rather thematic areas have been created. For instance, the library is spread across all levels with books divided by topic in accordance with other activity spaces within each floor - books on film, therefore, are located close to the cinema. The internal spaces are not clearly defined or fully efficient, but the design gives fluidity to the building: people can walk around freely and are welcome to sit and rest everywhere. The feel is spacious, transparent and welcoming.

The Forum includes two exhibition galleries, the interactive Storyworld museum, five cinema screens, a multi-purpose events venue, a Medialab and a Smartlab, the complete collections of the city library, dozens of study and work places, cafes and restaurants, shops, and a roof terrace with a rooftop cinema.

Figure: Building section



Programming

9.1.4.1 Knowledge cafe

All local schools and universities are eager to collaborate with the Forum Groningen to develop a variety of programs, while also providing an important source of funding. For instance, universities organize the 'knowledge cafes', informal discussions led by professors on a certain topic; which is intended to shorten the distance between the academic world and the population.

9.1.4.2 VERS | Forum

The VERS is a team of young people, aged from 12 to 18, from different schools organizing activities in the Forum. They are given a budget and defining a program and helps the Forum to cover the gaps in its offers by responding to the needs of the local young population. They also take care of the communication themselves, not only because they have a more effective marketing style but also because they take advantage of using their own communication channels and are able to reach the target group. So far, the activities have been very successful and many young people attend.

9.1.4.3 Evening Courses

The Forum organized courses held by specialists on a variety of themes - such as language cultures, Middle East politics, Rembrandt exhibition. The courses are paid and intended to help people to better understand current national and international topics. Courses run over two seasons and there are around 20/30 courses per season. Courses are run over 2 seasons and there is a total of 20 or 30 courses.

9.1.4.4 Start-up cafes

Start-up cafes are informal meetings designer for entrepreneurs, where founders of start-ups are able to share thoughts around how they managed their business and exchange suggestions of helpful tools.

9.1.4.5 On-stage

Local people are welcome to propose activities and run them in the Forum. There is no budget allocated for these activities but people do it because they love it and are really happy to be given the opportunities. So far, 'on-stage' programs have been very successful.

Overall, 80% of the total programming is developed in-house, while the 20% of the activities are organized by the local communities. The director wishes to decrease in-house programs to provide more opportunities for people to implement their ideas.

9.1.5 Audiences

The Forum's target has a very broad target audience. Because especially the library is for everybody, the Forum is for those who are interested.

The total number of visits are calculated with the use of smart cameras situated at the entrance and 98 cameras spread around the building. In the first two months for its opening, around 760,000 people have visited the Forum. Visitors are around 8,000 during weekdays and 15,000 on Saturday and Sunday. So far, the Forum was very successful as attendance hasn't decreased after Christmas holidays. In March the Forum will reach 1 million visitors which is above expectation.

9.1.6 Income streams / financial info

The building can be accessed for free. Entrance fees have been set for exhibitions, events and film screenings and performances.

The forum organization is subsidised by the government for 50% and has a turnover to £60 million a year. The building is owned by the government and the organization running it pays a yearly rent of £2.7 million. They are expecting to breakeven in 3 years.

9.1.7 Key findings

Forum Groningen is a very successful example of how a multi-functional cultural venue is able to regenerate a deprived area of a city. The Forum gathers different cultural institutions that were already operating in the city and managed to improve their offers by creating a synergy between them. Forum Groningen provides an extremely rich agenda of activities that respond to the needs of all local communities. The Forum highly involves young people as well as schools in the programming and in holding activities.

9.2 Metronome, Nottingham

9.2.1 Introduction

Opened in 2018, Metronome describes itself as 'a new, national centre for music, moving image, video games, live performance and spoken word'[96]. It is part of the Confetti Institute of Creative Technologies, which has itself been part of Nottingham Trent University (NTU) since 2015. Metronome is both a venue for mixed public programming and an education centre. It is the hub for Confetti's further and higher education (FE and HE) courses in music performance and technology and live events production. This combination of programming and education diversifies Nottingham's cultural landscape and allows students to gain hands-on, 'live' experience. Confetti's motto is 'Do it for real'[97].

9.2.2 Context

9.2.2.1 Confetti Media Group

Confetti Institute of Creative Technologies offers courses in film and television production; games development; live event production; music performance and technology; and visual effects production. These divide across three faculties: gaming, music and media (largely film and television). Confetti currently has approximately 2,000 students, divided roughly equally between FE and HE, with plans to increase this number by 200 next academic year.

Confetti Institute of Creative Technologies is part of the Confetti Media Group, owned by Nottingham Trent University. Confetti Media Group comprises several related enterprises, including: creative business hub Antenna; film and television production company Spool; and local television channel Notts TV. Antenna, Spool and Notts TV are based in the Antenna Media Centre, located across the road from Metronome. This range of activities within Confetti enables strong industry links for its education programmes.

Its links with Antenna are a key aspect of Metronome's context. Antenna provides working spaces for creative enterprises, from full tenancies for larger teams to flexible and coworking space for freelancers, sole traders and remote workers. This establishes excellent links for Confetti within the creative industries, enabling student opportunities including work placements / experience and channels into employment.

9.2.2.2 Creative Quarter

Metronome, the Antenna Media Centre and Confetti's general education building are all located within two blocks in Nottingham's developing Creative Quarter. The Creative Quarter is a collaboration between NTU and Nottingham City Council, among other partners. It incorporates mixed daytime and night-time uses and includes: the Sneinton Market regeneration, housing retail, enterprise and F&B spaces; BioCity, the UK's largest bioscience incubation centre; night clubs, bars and nightlife; cafes, restaurants and other eateries; and art, heritage and

[96] 'About Metronome', Metronome, accessed online 12 February 2020: https://metronome.uk.com/about-metronome/
[97] 'Our Industry Links', Confetti Institute of Creative Technologies, accessed online 12 February 2020: https://confetti.ac.uk/our-industry-links/

cinema venues. The Creative Quarter incorporates both the historic Lace Market area and a previously less prosperous, underutilised area of the city dissected by busy roads. The Creative Quarter overlaps with the city centre to the west; to the east it borders less affluent residential areas such as St Ann's.

9.2.3 Governance

Confetti Media Group (then Confetti Studios) was founded in 1994, training small numbers of students in sound engineering. The company expanded over the following two decades and diversified into operations including post-production services for film and television. It was therefore well established by the time of its 2015 purchase by NTU and Confetti founder Craig Chettle has stayed on as CEO. This has resulted in largely parallel structures for NTU and Confetti, with management being shared only at the highest levels. As a result of this arrangement, Confetti remains relatively nimble and autonomous, while sharing strategic direction and cross-curricular links with NTU. Confetti has expanded significantly since joining NTU, with Metronome being one key development resulting from the move.

9.2.4 Summary of spaces / facilities

Metronome occupies a converted former Post Office building. It contains: a main auditorium; six recording studios; 14 rehearsal rooms, including a 'mini auditorium' for performance practice; a mastering suite; three dressing rooms; a bar and atrium (560 combined capacity); and a corridor gallery with 25 screens recently installed, intended to show digital art and other content.

The main auditorium has a standing capacity of 400 and a seated capacity of 220. The space features: automated retractable seating; a 10.9m x 4.2m stage; an LED video wall (8m x 2.5m total), made up of modular blocks to enable multiple configurations; a 7m x 3m projector screen; a high-quality PA system; lighting systems; a full multi-camera capture and broadcast facility; and a live events production workspace. The auditorium is a suspended cube, maximising sound proofing by avoiding shared walls with other spaces.

Metronome's initial design left room for future expansion. A new suite of rehearsal and recording facilities is currently being completed, with a view to providing separate provision (and entrances) for FE and HE students. There is also the potential for a 'mini' eSport auditorium to be added.

The design of all Metronome's spaces is purpose driven, with a clean, simple aesthetic. Its facilities and equipment are extremely high quality. Metronome's venue was designed by White Mark Ltd, a company which has previously designed studios for clients such as Jay-Z and Damon Albarn. The high standard of provision is in large part a result of NTU's involvement; top-quality facilities are required to draw students, and student numbers in turn generate funds.

Accessibility was a priority when designing Metronome and the building is accessible throughout. This is a continuing commitment, with the building currently undergoing audit by Attitude is Everything, a charity which consults on the accessibility of spaces.

9.2.5 Programming / activities

9.2.5.1 Education

Metronome is the education hub for courses in Confetti's music faculty. Its rehearsal and recording facilities double as learning spaces, enabling practical and hands-on teaching. Students also use these facilities to undertake course work. The recording and rehearsal studios are made available to students outside study hours (including in the evenings) and students can book them out to work on personal projects during this time. Learning also takes place in the auditorium, where students practice event set up and take down and other aspects of live performance support. Students shadow Metronome's team during public events, gaining first-hand experience of event delivery and learning from expert professionals.

9.2.5.2 Public programming

Metronome offers a varied cultural programme, including live music performance and DJs, poetry, lectures, comedy and eSports. The aim is to create a 'cultural mix' of programming, balancing this with demand and profitability. Achieving the right mix is essential to Metronome's place in Nottingham's cultural landscape; its offer is positioned as distinctive and eclectic, an alternative to the city's more mainstream venues. NTU has a role in helping Confetti determine this cultural mix, with its culture lead involved in shaping the offer.

Metronome hosts both in-house and external events. In-house events are booked by its internal promoter, assuming all outgoings and retaining all profits. External promoters can hire out the auditorium space, paying for technical support from Metronome's team - the external promoter keeps ticket revenue, but Metronome retains income from bar sales. Metronome's regular 'Just the Tonic' comedy nights are organised by an external company, for example. Metronome also participates in city-wide events, such as the annual Nottingham Poetry Festival; Confetti and NTU are both organising partners of the festival. Metronome hosts occasional student performances, such as the NTU Battle of the Bands, but the focus is not on promoting student performance through the public programming.

eSports events are a growing area of programming for Metronome. Having hosted a number of local events, in December 2019 it was the venue for the three-day British University eSports Championship Winter Finals. This proved lucrative due to the high degree of technical support required by the external organiser.

9.2.5.3 Balancing educational and commercial usage

Metronome's key strength is the balance it strikes between educational and commercial usage. This is achieved by viewing the building as two overlapping zones, split between floors. The lower floor, where the recording and rehearsal spaces are located, is primarily focused on education, while the upper floor (the bar, auditorium, atrium and dressing rooms) is primarily for commercial usage. This boundary is fluid, with learning sessions held in the auditorium and student involvement in commercial events. There are also occasional commercial lets of the recording and rehearsal spaces, although the high level of student demand for these facilities does not allow for significant amounts of commercial or community use.

This balance is reflected in the roles of the Metronome and wider Confetti team, all of whom support education in addition to performing their wider roles. As an indication of how this impacts roles across the organisation, the Head of Hospitality and Corporate Services for Confetti Media Group spends about 20% of his time on education, while Metronome's lead technician allocates around 30% of his time to education.

Metronome's education and programming provision evolve in response to one another. For example, the growing demand for eSports events is reflected in both the potential new eSports auditorium and a planned new degree in eSports.

9.2.5.4 Non-event use

Metronome does not enable public use outside of event hours. The bar is open only during events, providing a workspace for staff and students when closed. As such, Metronome does not currently create a public realm or 'living room' area. In collaboration with Nottingham City Council, an outdoor public realm is being created across the road, outside the Antenna Media Centre, through the pedestrianisation of a street. This will be the only publicly accessible space provided by Confetti, outside of organised events.

9.2.6 Partnerships and community impact

9.2.6.1 Industry partnerships

Metronome has strong industry links though both Confetti and its own staff team, the majority of whom have backgrounds in the music industry. This gives students access to a wide range of industry professionals. This is perhaps best exemplified by Industry Week, during which industry professionals, including some 'big names', are invited to speak to the students.

Metronome also involves its students in practical collaborations, such as the Splendour music festival. The 'second stage' at this event, held in Nottingham's Wollaton Park, is the Confetti Stage, operated by 50 students and 30 members of staff.

As a venue for external promoters, Metronome attracts the custom of key industry partners. These include both DHP Family (which owns four Nottingham venues, as well as others nationwide) and Rough Trade (a national record store chain, associated with a record label of the same name). Metronome's use as a venue by these partners is a marker of its success in carving out a distinctive space for itself in the city's cultural landscape; DHP uses it for events that fall outside the remit of its own more mainstream venues. Rough Trade brings 'bigger name' acts to Metronome, as its own Nottingham venue is too small to accommodate these performances.

9.2.6.2 Student outcomes

Confetti's FE provision and proximity to deprived areas of Nottingham enables it to provide significant social benefits for the area. Its FE courses attract young people with low academic attainment, many of them local, providing a gateway into creative careers and higher education.

Many of Confetti's music graduates pursue careers as performers. Some are successful - alumni include Jake Bugg and a member of Maximo Park. Those who are less successful or who choose alternative paths often take up technical or engineering roles within the music industry. Some move into other creative sectors, such as film and television.

Confetti's student outcomes are perhaps most transformative for those on its gaming courses. As an expanding industry with a limited talent pool, gaming has an undersupply of qualified applicants for roles. Confetti's graduates are therefore well positioned for success in the sector; this is particularly striking for those entering FE courses with low attainment. The wealth of opportunities in the gaming sector sees many graduates leaving the area, often to take up opportunities overseas.

9.2.6.3 Audiences

Despite its university associations, Metronome is clear that it is far from being a student venue. Its programming is selected to cater to all those seeking something distinct from Nottingham's wider cultural offer.

In direct opposition to this aim, Metronome faces a marketing challenge around NTU's involvement. University branding has been identified as potentially discouraging to wider audiences, who can see it as indicating that Metronome is 'for students'. As a result, a careful balance has to be struck within Metronome's marketing, acknowledging NTU's role while establishing an independent identity for the venue.

9.2.7 Key findings

- Metronome provides a strong model for mutually supportive education and public programming activity within a single venue, through university involvement. Events and performance facilities provide practical learning opportunities, while student requirements secure top-quality infrastructure for the venue. The creation of distinct yet overlapping spheres within the venue is successful.
- Confetti's creative business hub Antenna, located adjacent to Metronome, is key in strengthening Metronome's industry links, feeding both its education and programming streams. It is interesting to consider the potential implications were Antenna located within the Metronome building.
- Metronome has been highly successful in creating a distinctive cultural offer, broadening Nottingham's cultural landscape and positioning itself clearly within it.
- Metronome's education provision, particularly its FE courses, has significant community impact, providing a gateway into creative careers and higher education for local young people with low academic attainment.
- Although it is part of NTU, Confetti's governance model sees its management overlap with that of the wider university only at the highest levels. This has proved a successful model, enabling Confetti to remain nimble while collaborating effectively with other parts of NTU.
- Metronome is a key element of Nottingham's developing Creative Quarter, an initiative with some similarities to the North West Quadrant. The Creative Quarter is regenerating a previously underutilised area adjoining the city centre, dissected by busy roads.
- Neither Metronome nor Confetti more widely provides a public realm or 'living room' space outside of event times. As such, Metronome does not offer a complete model for the North West Quadrant's cultural space.

9.3 HOME Manchester

9.3.1 Introduction

HOME is an arts organisation that was formed following a merger between two key Manchester cultural institutions as part of Greater Manchester Arts Centre Ltd: Cornerhouse, an international centre for contemporary visual art and independent film; and the Library Theatre Company, housed in Manchester Central Reference Library until that site was renovated in 2010. A venue for HOME opened in 2015, with facilities for the community to celebrate and participate in contemporary theatre, film, art and music. In 2016-2017, HOME had 790,000 visits, with 348,000 customers to the café and bar. The Visual Arts programme had 53,000 visitors, the theatre had 45,000 visitors, the cinema sold 167,000 tickets and the engagement programme had 29,000 attendances.

9.3.2 Relevance to NWQ

HOME is a successful multi-purpose arts centre which opened as part of the Manchester Council's regeneration strategy. Despite the fact that HOME is focused on providing mainly a cultural offer, combining a multi-plex cinema with two versatile theatre spaces (a large auditorium and a studio), a gallery for the visual arts and wide-ranging food and drink options, it provides a great example of an arts venue which built on the momentum of wider urban development efforts. With a very strong brand and sense of identity, HOME has been very successful in attracting younger audiences to its premises, which is something VWQ should aim to achieve.

9.3.3 Local context

When HOME opened in April 2015, it was part of a string of major institutions opening following refurbishments, including the Central Library, the Royal Northern College of Music, and Manchester School of Art. The council is the driving force behind this regeneration, seeing culture as integral to its growth strategy, making the city a tourist destination and attracting businesses. This focus on culture is still integral to the council's vision, with plans for a new £110 million arts centre underway: Factory will be built on the site of the Granada studios, transforming that part of the city centre.

HOME has a unique offer in Manchester, with theatre, cinema and gallery spaces all in the same venue. While there are several other multi-plex cinemas in the city, these are all chains such as Odeon, Showcase, Cineworld, Vue and IMAX, and are single-purpose sites. There are over ten other theatres and concert venues in central Manchester ranging from large commercial enterprises to community-centric spaces. Some of these competitors have an expanded offer: the Albert Hall has a great dining experience, the Lowry has a fantastic art gallery, and the Dancehouse hosts classes and cinema screenings regularly.

9.3.4 Visitor experience

HOME is at the heart of the city centre, and within easy reach of many public transport links: Deansgate and Manchester Oxford Road train stations are a short walk away. A public car park is located next door, with 28 disabled parking spaces, and HOME visitors receive a 20% discount on parking. The building is fully accessible, with a lift enabling visitors to access the facilities on every floor; every cinema screen has wheelchair access,

wheelchair spaces are available in the main theatre, and accessible toilets are available on every floor. Panels and vinyl lettering indicate the names of the spaces within the venue and signpost the nearest facilities.
The film programme is updated weekly on Tuesday afternoons, and is available online as well as at the box office. Theatre productions and exhibitions are announced up to three months in advance, but some access events are programmed at shorter notice. All cinema screens are equipped with infrared audio description equipment and induction loops; audio description headsets and portable induction loops can also be rented from the box office for selected theatre performances. BSL interpreted screenings and events, and BSL led tours, are in the public programme, along with caption subtitled films and performances where possible.

Parent and Baby screenings are scheduled monthly for the exclusive use of parents, grandparents and carers of babies under 12 months old; children older than 12 months are welcome to the monthly Bring the Family screenings. HOME also offers Relaxed Performances and Screenings, which have been designed to be friendlier for people on the autism spectrum, those with sensory disorders, or with learning difficulties.

The website is easily navigable and has the up-to-date schedule, visitor information and links to supporting the venue. Tickets can be bought online through the website, in person or over the phone. It has been designed with options for visually impaired visitors for varying font sizes and colour schemes. One section of the website is dedicated to a Digital Channel, in association with Virgin Media Business, which has a library of news clips, sound clips, trailers and podcasts.

9.3.5 Visitor offer

- HOME has a 499-seat flexible proscenium arch style theatre, a 132-seat flexible studio space, 5 cinema screens (seating 230, 147, 58, 33 and 36 people), 3 gallery spaces, education spaces, offices, a bookshop, a café bar, a restaurant and an outdoor terrace
- The venue is open daily; the different areas have different opening times, with the longest hours in the ground-floor bar, from 10am-11pm Mon-Thursday, 10am-midnight Fri-Sat, 11am-10.30pm Sundays
- All of the spaces at HOME are available for venue hire: The Weston Room (rehearsal space); Event Space; cinema screens; auditorium and studio
- The box office is open daily between 12pm-8pm
- Concessionary tickets are available for seniors, students, children, jobseekers, people with disabilities and their carers, HOME members and friends; group discounts are available depending on the group size
- Students and jobseekers are eligible to purchase £5 advance tickets for cinema and theatre
- Theatre 1 has three-tier seating, with stalls, circle and gallery levels; the seating can be reconfigured
- An extensive film programme offering new releases, classic films, archive material, shorts, animation, documentary, and Avant Garde film and television
- Across the five cinema screens, HOME has the facilities to present films that use a range of formats, from split-reel 35mm for archive prints to state-of-the-art Sony 4k digital projectors for contemporary work. HOME explores new methods of screening and curation
- HOME hosts UK premieres for foreign language plays
- Listings are available on the website and in a downloadable weekly brochure, compiling the films, theatre events and exhibitions, and the showing times. The busiest day is a Saturday, with up to 10 films scheduled, panel discussions, workshops and shows
- HOME commissions artists to produce unique theatrical experiences, and to challenge the boundaries of and distinctions between film and visual art. These commissions are exhibited as part of biennials and festivals on an international scale, as well as at HOME. All artist-led projects and commissions links to the wider events programme for community involvement
- HOME works with international partners to produce new dance theatre
- All exhibitions held in the gallery space are free entry. They are commissioned by HOME and must include new work; these shows are thus unique to the venue
- Bookshop stocks book and magazine titles to complement the artistic programme, and greetings cards including locally-produced artist's cards
- School visits
- Artworks on sale in the Granada Foundation Galleries, or limited edition prints on sale in the bookshop or box office, encouraging personal patronage and local pride – many works costing under £100
- Ground Floor Bar – eat in or takeaway available, with an outdoor seating area

- First Floor Restaurant – open for pre-theatre dinner, lunch or brunch
- Cinema Bar and Roof Terrace – range of alcoholic and soft drinks, with an outdoor seating area

9.3.6 Audience profile

The HOME Engagement programme connects with 159 community groups across greater Manchester, showing the wide reach and range of audiences. There is a strong drive at HOME to engage with young people, school pupils and students, and while this is being achieved, it is primarily white, middle-class young people living towards the city centre. Aims for 2017-2018 include attracting more BAME people with a lower socio-economic status from the outer boroughs.

9.3.7 Summary of the income model

HOME is the trading name of Greater Manchester Arts Centre Ltd, a registered charity. Greater Manchester Arts Services Ltd is the company that operates the bookshop and manages the catering and bar franchise. Profits from GMAS are gift-aided to GMAC. There are 120 employees at HOME, of which 97 are full time.

Table: Summary of income at HOME

Income source	2015/16	2016/17
Charitable activities	£4,050,877	£4,106,071
Donations	£1,749,576	£1,673,278
Trading activities	£685,340	£717,339

Table: Key expenditure at HOME

Expenditure	2015/16	2016/17
Salaries relating to film/theatre/visual arts/engagement/merger and development	£1,102,024	£1,104,581
Employees (total)	£2,686,068	£2,903,240

Table: Sources of income at HOME

Income source	Details	2016-2017
Cinema	Off peak, before 5pm: Full: £7, Concession: £5 Member, full: £5.50, Concession: £4 Peak, after 5pm: Full: £9, Concession: £7 Member, full: £7, Concession: £5.50 Concessions available for seniors, students, children, jobseekers, people with disabilities and their carers, HOME members and friends; group discounts are available depending on the group size £5 tickets available for students and jobseekers Prices vary for special events and live broadcasts	£1,358,393 Average ticket price: £8.13
Theatre	Standard previews are £10 Standard ticket prices range from £10-£29 HOME Members and HOME Friends receive 10% off most theatre productions £5 tickets available for students and jobseekers	£1,207,578 Average ticket price: £26.84
Visual Arts	Exhibitions are free entry; However, the visual arts programme generated this income through project grants and other income streams	£89,505
Grants	Arts Council England North West – unrestricted grant	£1,297,513
	British Film Institute - grant for a diverse film programme	£100,000
	Association of Greater Manchester Authorities – grant conditional on approved plan of delivery	£141,000
Funding	Manchester City Council operates a Service Level Agreement – the charity is paid to operate the Facility, present a programme of artistic works for the public and deliver an education, community, youth and outreach programme, monitored through KPIs	£1,368,494
Membership	Corporate and individual membership	£60,578

	HOME Membership from £30 a year. Benefits include two free cinema tickets, priority booking, discounts; there are 2,400 Members	
	HOME Friends make a monthly donation, from £7.50 a month. Tiered scheme, with HOME, Silver, Gold and Platinum levels; there are 116 Friends	
	Corporate membership comes in two options – Package A (£3000/year) or Package B (£5000/year). Includes free tickets, complimentary event hire, major discounts on private screenings and on F&B	
Sponsorship	Corporate sponsorship – businesses can sponsor a project or activity. Bespoke packages tailored to business objectives, providing brand awareness, audience access, product showcasing, staff engagement, opportunities for social investment, creative marketing and PR	£234,680
Engagement	The Engagement programme includes Communities, Young People, Schools, Volunteers & Work Based Training, Talent Development and Showcase Opportunities	£484,783
Trading	Greater Manchester Arts Services Ltd (GMAS) operates a bookshop, and the café and bar through a commercial franchise arrangement with a third party	£96,750
	The five cinema spaces, contemporary function room and outdoor terrace are available for hire. The theatres are available for conferences	
	The Event Space is £450/day, while the cinemas can be hired for up to £275/hour, between 10am-12.30pm	
Venue, room hire and rent	Bespoke catering facilities are also available	£194,264

9.4 Storyhouse Chester[98]

9.4.1 Introduction & Context

Storyhouse is a multi-cultural centre opened in Chester in May 2017 with the mission of promoting the presentation and development of the performing arts in and around the city. So far, the Storyhouse has been awarded several prizes for Best Public Building.

9.4.2 Governance

The charity is controlled by its governing document, a deed of trust, and constituted a limited company, limited by guarantee. The board retains full control and approves all major strategic decisions while the leadership and management is delegated to the chief executive. Storyhouse runs two wholly owned commercial trading subsidiaries, Storyhouse Production Company and Storyhouse Catering Company, both registered in April 2017. Storyhouse has partnership with 116 organizations including 12 key partners with whom they have formal agreements to shared objectives.

9.4.3 Summary of spaces / facilities[99]

Storyhouse building was opened in 2017 with a total investment of £37 million. The original parts of the building were constructed as an art deco Odeon cinema in 1936, and have now been restored, extended and renovated into a library, two state of the art theatres, a cinema, library, restaurant and two bars.

The larger theatre is an 800-seat proscenium arch stage. With state-of-the-art facilities, its auditorium spreads across three tiers: stalls, circle and gallery. This same theatre converts into a 500-seat thrust stage (with the audience wrapping around three sides of the stage). In this format, the auditorium spreads across two tiers with intimate seating putting the audience right in amongst the action.

On top of the building sits the Garret Theatre and Bar. This 150-seat black-box theatre is a flexible, fully equipped performance, rehearsal or workshop space. The Garret is designed to be full of work local creative companies, individuals and organisations make. The Garret sits next to a stunning, glass-fronted bar with views across the city.
The 100-seat boutique cinema is designed to honour the original Odeon's history as a cinema in 1936. With plush red velvet, and soft, sunken seating, it is a beautiful event space.

The library spreads right through the building, with family-friendly library activity happening across all Storyhouse's spaces. Extensive book-stock covers the walls throughout the old Odeon and a new children's area offers opportunities for wet-play, arts and crafts activity and storytelling. New study areas offer opportunities for studying, learning and research.

98 https://beta.charitycommission.gov.uk/charity-details/?regid=1121007&subid=0
99 https://www.storyhouse.com/about/the-building

9.4.4 Programming

- 2,813 activities for local marginalized groups, including autism friendly colouring sessions, sewing groups for refugees and regular classes for isolated and older communities
- 51 sessions per week including self-help session of Mental Health, Older people writing's workshop, Guide Self Help, and many other
- A significant investment in the partner Fallen Angels to help their work with people in recovery
- The creation of Kaleidoscope Festival by 23 partner charities to stage events by and for people living with disabilities; 1,369 people took part
- The festival of language celebrated new immigrant communities and reached 1,241 people
- Youth Forum: training for 5-26-years-old to perform in plays, to lead reading groups, to programme the cinema, to run music gigs, to market shows, to design budget, program and deliver their own festival
- Run 18 regular youth groups. 274 young people benefitted from the 389 creative sessions; 161 young people joined these groups for free through the access fund
- Storyhouse invests heavily in local creative talent, including £15,000-worth of scholarship for students to study on MA programs delivered in partnership with the University of Chester

9.4.5 Audiences

From March 2018 to March 2019, Storyhouse had over £1 customer visits including the following as relevant:
200,967 ticket bought

- 212,942 books borrowed
- 100,077 taking part
- 202,000 working, studying, meeting friends
- 101,000 cups of coffee

20,104 young people took part in creative workshops at Storyhouse last year. 32,194 young people saw shows and 3,334 saw these for free.

9.4.6 Income streams / financial info

Total income for the year 2018-2019 was £6.69 million, up from £5.84 million in 2017-2018 with earned income increasing to 77% from 71% in the prior year.

Table: Summary of income at Storyhouse, Chester

Income source	2018/2019
Charitable activities	£380,000
Donations	£1,660,000
Trading activities	£3,060,000
Other	£1,600,000

The reported deficit for the period was just £11 thousands, against £22 thousands in 2017-2018. The group's two subsidiary companies continue to perform well: Storyhouse Catering delivers a contribution to the group of £396 thousand which represents 46% of the total turnover.
Between March 2018 and March 2019, Storyhouse collaborated with 1,193 people to produce their work which includes activities, theatre, festivals. Such work accounted for 54% of the turnover. It delivered £23.5 million of economic benefit during the year - including £1.92 million spent directly on production and £11 million spent by Storyhouse's customers on the local economy, a further 113 in the wider economy.

Storyhouse staff includes 121 employees and 115 volunteers.

9.4.7 Relevance to NWQ

Storyhouse is a multi-awarded building whose innovative spaces have been designed to be extremely flexible and to accommodate various types of activities. Storyhouse largely focuses on young people: not only it provides theatre programs with sessions and training for all young people from 5 to 25 years old, but also it supports them by investing in young talents and offering scholarships.

9.5 M Shed - Bristol[100]

9.5.1 Introduction & Context

M Shed is the history museum of Bristol that was born out of the transformation of the 1950s transit shed - originally called M Shed - that was situated on Bristol's historic wharf.
The museum tells the story of the city from prehistoric times to the 21st century through the recollections of the people who shaped the city. Stories about the city and its people have been discovered through working with experts and communities across the city – a process that will continue for the life of the museum. Rich collections of objects, art and archives also play an important part in bringing those stories to life.

9.5.2 Summary of spaces / facilities

Facilities	Description
Bristol Places Gallery	It highlights how and why Bristol has transformed over time, how people have developed various ways in which to move around it and showcases some amazing discoveries that have been made in and around the city.
Bristol People Gallery	Explores the activities past and present that make Bristol what it is. The main themes are creating, trading, challenging and celebrating. Here people can discover things that were created in Bristol from music and art to industry and technology. People can also immerse in one of the many festivals, events and celebrations held in the city
Bristol Life Gallery	It explores how people's shared experiences in the city. It shows the routine, the fun and occasionally moving ways in which people have experienced their city over the centuries. Here people can find out how Bristol families have lived, learned, worked and socialised and discover how and why people moved to Bristol and the challenges they have faced
Working exhibits	They are situated outside the M Shed and open even where the museum is closed. People can visit M Shed on a crane, boat or train day, where you can chat to staff and volunteers and experience the working dockside
Treasures in store	People can see the part of the collection which is not currently on display. This contains thousands of items from the industrial, maritime and social history collections.
Events suite	It can seat 240 people and is used for conferences, private events and weddings or other private hires
2 studios	The studio can hold up to 120 people and are available for private hires
A shop	It stocks a wide selection of quirky and creative gifts that capture the essence of Bristol

[100] https://www.bristolmuseums.org.uk/m-shed/

A café	It offers a delicious range of fresh, Fairtrade and organic hot and cold food and drinks. It also offers a lovely view across the harbour and city

9.5.3 Programming

M Shed is a new kind of museum rather than a traditional history museum. It is a living museum and works with the people of Bristol to create displays which make everyone want to come and see.

Visitors can see 150 restored and digitalised films and uncover Bristol's trading past and its role in the transatlantic slave trade. Explore the city's war-time experiences, industrial heritage and engineering history. Discover things made in Bristol from its music and art to industry and technology, see over 3000 objects from the city's museum and archive collections including favourites from the Industrial Museum.

9.5.4 Audiences

M Shed offers activities suitable for all types of people. However, the museums organize specific activities for kids, families, schools and people with autism.

9.5.5 Income streams / financial info[101]

M Shed is part of the Bristol Museums together with the following institutions: Bristol Museums and Art Gallery, the Georgian House Museum, the Red Lodge Museum, Blaise Museum, Bristol Archives. The Bristol Museums Development Trust was established in 2008 in order to financially support all Bristol Museums.

In recent years, the Trust officially launched its Patron Circle, an annual membership scheme for individuals who want to develop a closer relationship with Bristol Museums, our expert curators and museum staff, and expand their knowledge of our collections. The benefits of joining the Patron Circle include invitations to private views, curator-led behind the scenes tours including an early morning one with breakfast, a summer party, and subscription to the donor newsletter Treasure. Gift Aid can be claimed on all of the individual membership of £500 and on £700 of the £750 joint membership. Patrons can spread their payments using direct debit. In the current period, our Patron Circle generated a total income of £12,651.

M Shed is free to the public. Temporary exhibitions may be ticketed, or visitors may be asked to 'Pay What You Think', this money going directly to Bristol Museums. However, staff at M Shed continue to greet visitors, ask for donations and encourage donors to Gift Aid. At M Shed total donations from visitors (including donations on exhibition tickets and Gift Aid) amounted to £48,746, compared to £13,583 during the last period, an increase of 259%.

9.5.6 Relevance to NWQ

M Shed is an innovative museum: thanks to its creative exhibits, it is able to involve many visitors and local communities thus being a more involving and inclusive history museum.

[101] http://apps.charitycommission.gov.uk/Accounts/Ends77/0001137777_AC_20180930_E_C.PDF

9.6 The Shed - New York

9.6.1 Introduction & Context

The Shed is located at the northern end of the High Line on Manhattan's reborn West Side, where the High Line meets Hudson Yards, adjacent to 15 Hudson Yards and bordering the Public Square and Gardens. The project location enables to bring performances and art to the city's newest neighbourhood.

The idea of The Shed emerged in 2008, when New York City put out a request for proposals for the site that used to be one of the most desolate areas of Manhattan. The City intention was that of creating a "unique and innovative place for creative expression and the deepest, freshest thinking regarding cultural production and consumption"—a place where artists, thinkers, and makers across all disciplines could create work that would not or could not be realized anywhere else.[102]

The $500m building was inspired by Cedric Price's Fun Palace, a dreamy 1960s idea for a plug-in, endlessly evolving arts complex (which partly informed the Pompidou Centre), and a desire to anticipate the future of whatever forms art might take. The Shed ultimate mission is that of support a multidisciplinary and collaborative creation of unique works of art.[103]

9.6.2 Summary of spaces / facilities

The Shed was conceived as a flexible and adaptable structure to allow an extraordinarily diverse group of creators and artists to incorporate the building into their work.

The building features a 120-foot telescopic shell that can extend out from the base building to double the building's footprint when needed for larger performances.[104]

Its eight-level base building includes:[105]

- Two large gallery spaces
- The Griffin Theatre: a versatile theatre that accommodates 500-seat
- The Tisch Skylights on the top floor which includes: a rehearsal space, an artists' lab, a skylit event space
- The McCourt: a 17,000 square-foot iconic space that can be created when the movable shell is deployed. It is a multi-use space, typically used for large-scale performances, installations, and events, that can accommodate a seated audience of 1,250 or over 2,000 standing. In turn, large doors on the north and east sides of the McCourt can open to become an open-air pavilion.
- The McCourt was named in recognition of Shed board member Frank McCourt Jr. and his family.[106]

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[102] https://theshed.org/about/history
[103] https://www.theguardian.com/artanddesign/2019/apr/05/shed-new-york-inside-arts-complex-hudson-yards
[104] https://www.archdaily.com/914450/the-shed-opens-in-new-yorks-hudson-yards
[105] https://www.hudsonyardsnewyork.com/discover/shed
[106] https://www.archdaily.com/914450/the-shed-opens-in-new-yorks-hudson-yards

- With the shell in place, the 20,000-square-foot exterior plaza creates room for outdoor exhibitions and events.[107]

9.6.3 Programming & Audience

The Shed commissions original works of art, across all disciplines, for all audiences. It brings together established and emerging artists in fields ranging from hip hop to classical music, painting to digital media, theatre to literature, and sculpture to dance. The Shed offers access and insight into the creative process in order to forge deep bonds between artists and audiences. It also Driven by our belief that access to art is a right, and not a privilege, we'll present exciting, engaging experiences for our communities and our time.[108]

9.6.4 Relevance to NWQ

The key feature of The Shed is its flexibility which enables the building to be responsive to the ever-changing needs of artists.

107 Ibid.
108 https://theshed.org/program/series/15-open-call

9.7 MIT Media Lab

9.7.1 Introduction & Context[109]

The Media Lab is a multi-disciplinary research laboratory at the Massachusetts Institute of Technology. It was founded in 1985 by MIT Professor Nicholas Negroponte and the late Jerome Wiesner (former science advisor to President John F. Kennedy and former president of MIT). Media Lab focuses on the study, invention, and creative use of digital technologies to enhance the ways that people think, express, and communicate ideas, and explore new scientific frontiers. Disruptive technologies are created, and such areas as wearable computing, tangible interfaces, and affective computing are pioneering.

Today, faculty members, research staff, and students at the Lab work in over 25 research groups and initiatives on more than 450 projects that range from digital approaches for treating neurological disorders, to advanced imaging technologies that can "see around a corner," to the world's first "smart" powered ankle-foot prosthesis. Lab researchers are committed to delving into the questions not yet asked, whose answers could radically improve the way people live, learn, express themselves, work, and play. Therefore, the Media Lab ultimate mission is to leverage the best that technology has to offer and connecting technology back to the social and the human.

9.7.2 Building & Governance

The Media Lab is a six-floor structure of approximately 163,000 square feet. It forms a complex with the existing Wiesner Building which includes the List Visual Arts Centre, the School of Architecture + Planning's Program in Art, Culture and Technology, the Arts at MIT, and MIT's Program in Comparative Media Studies.

The Lab is supported by more than 80 members, including some of the world's leading organizations. Our members provide the majority of the Lab's approximately $80 million annual operating budget, and their businesses range from electronics to entertainment, fashion to health care, and toys to telecommunications.[110]

9.7.3 People

Unlike other laboratories at MIT, the Media Lab comprises both a broad research agenda and a degree-granting Program in Media Arts and Sciences.

- More than 30 faculty and senior researchers lead the Lab's research program, working with over 175 research staff members, visiting scientists, postdoctoral researchers, and lecturers.
- Some 100 other staff members support the Lab's research, facilities, and administration.
- Graduate enrolment totals 190, with 98 master's and 92 doctoral students.
- More than 55 graduate students from other MIT departments carry out research at the Lab, and more than 200 undergraduates work here each year through MIT's Undergraduate Research Opportunities Program (UROP).

[109] https://dam-prod.media.mit.edu/x/2018/05/24/Unique%20Perspective%20May%202018_tNbz4ms.pdf
[110] https://www.media.mit.edu/about/funding-and-support/

9.7.4 Researches and programs[111]

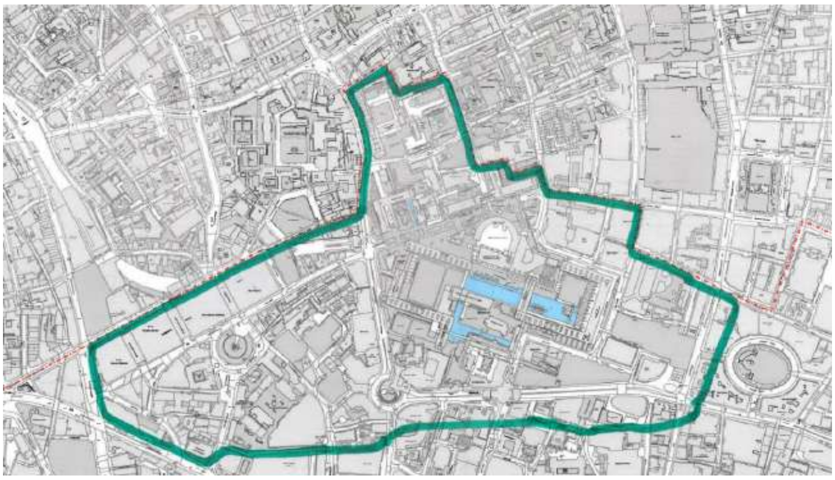
Program	Description
Advancing Wellbeing	Funded by a $1 million grant from the Robert Wood Johnson Foundation, it combines academics with on-the-ground ideas to promote better health at MIT and beyond
CE 2.0	It is a collaboration with member companies to formulate the principles for a new generation of consumer electronics that are highly connected, seamlessly interoperable, situation-aware, and radically simpler to use
Centre for Civic Media	It is a joint program with MIT's Comparative Media Studies/ Writing program, creates and deploys technical and social tools that meet the information needs of communities.
Centre for Extreme Bionics	It is an interdisciplinary effort at MIT which challenges current assumptions about serious physical and mental impairments
Community Biotechnology	Researchers are developing tools and technologies to enable the broadest possible participation in biotechnology. Projects include the creation of low-cost enabling hardware, infrastructure for sharing, and new interfaces for artistic expression with biology
MIT Digital Currency Initiative (DCI)	It brings together global experts in areas ranging from cryptography, to economics, to privacy, to distributed systems to explore the many issues involved in blockchain and bitcoin technology
Ethics and Governance of Artificial Intelligence	It explores global applications to advance AI research
Knowledge Futures Group (KFG)	It is a joint venture of the MIT Media Lab and the MIT Press which develops and deploys technologies that form part of a new open knowledge ecosystem
Laboratory for Social Machines	Funded by a five-year, $10-million commitment from Twitter, it develops new technologies to make sense of semantic and social patterns across the broad span of public mass media, social media, data streams, and digital content
Media Lab Learning	It aims at designing tools and technologies that change how, when, where, and what we learn; and developing new solutions to enable and enhance learning everywhere
Open Agriculture (OpenAg)	It builds collaborative tools and platforms to develop an open source ecosystem of food technologies that enables and promotes transparency, networked experimentation, education, and local production
Open Ocean	Here, researchers work at the intersection of science, technology, art, and society to design and deploy new ways to understand the ocean and connect people to it in novel ways, empowering a global community of explorers
Space Exploration	It aims to drive innovation at the frontiers of space exploration, from the holy grail of "life in space" to widespread societal involvement in "open space"

9.7.5 Relevance to NWQ

The MIT Media Lab is an extremely successful university Lab which is able to attract international people for innovative workshops and research. University laboratories can support research by providing a highly collaborative and interdisciplinary environment.

[111] https://dam-prod.media.mit.edu/x/2018/10/15/at-a-glance-2018.pdf

9.8 Culture Mile



9.8.1 Introduction & Context

Culture Mile was launched in 2017 by the City of London Corporation in partnership with the Barbican, Guildhall School of Music & Drama, London Symphony Orchestra and the Museum of London. Situated between Farringdon and Moorgate, and covering the northern section of the City, Culture Mile is 'a new home for contemporary culture in the ancient heart of London's working capital'.[112]

Because of the dynamic and unique mix of world-class cultural organisations and thriving businesses in its geographical remit, Culture Mile is ideally placed to set a new standard for the integration and cross-pollination of business and creativity. The aim of the initiative was to improve infrastructure and links between venues and organisations and imaginative programming, collaborations and events in order to create a vibrant cultural destination attracting visitors, residents and workers.

9.8.2 The project

The City of London Corporation, on behalf of the Culture Mile Creativity in Business Working Group, commissioned Barker Langham to analyse the role of creativity within the corporate sector and opportunities for cross-sector collaboration within Culture Mile. The purpose of this research was to interrogate its real and perceived value while establishing any evidence, to understand what the role of creative and cultural organisations can be in cultivating innovation across sectors and to ascertain if there was the appetite and potential market for collaboration and cross-pollination within Culture Mile and across the City.

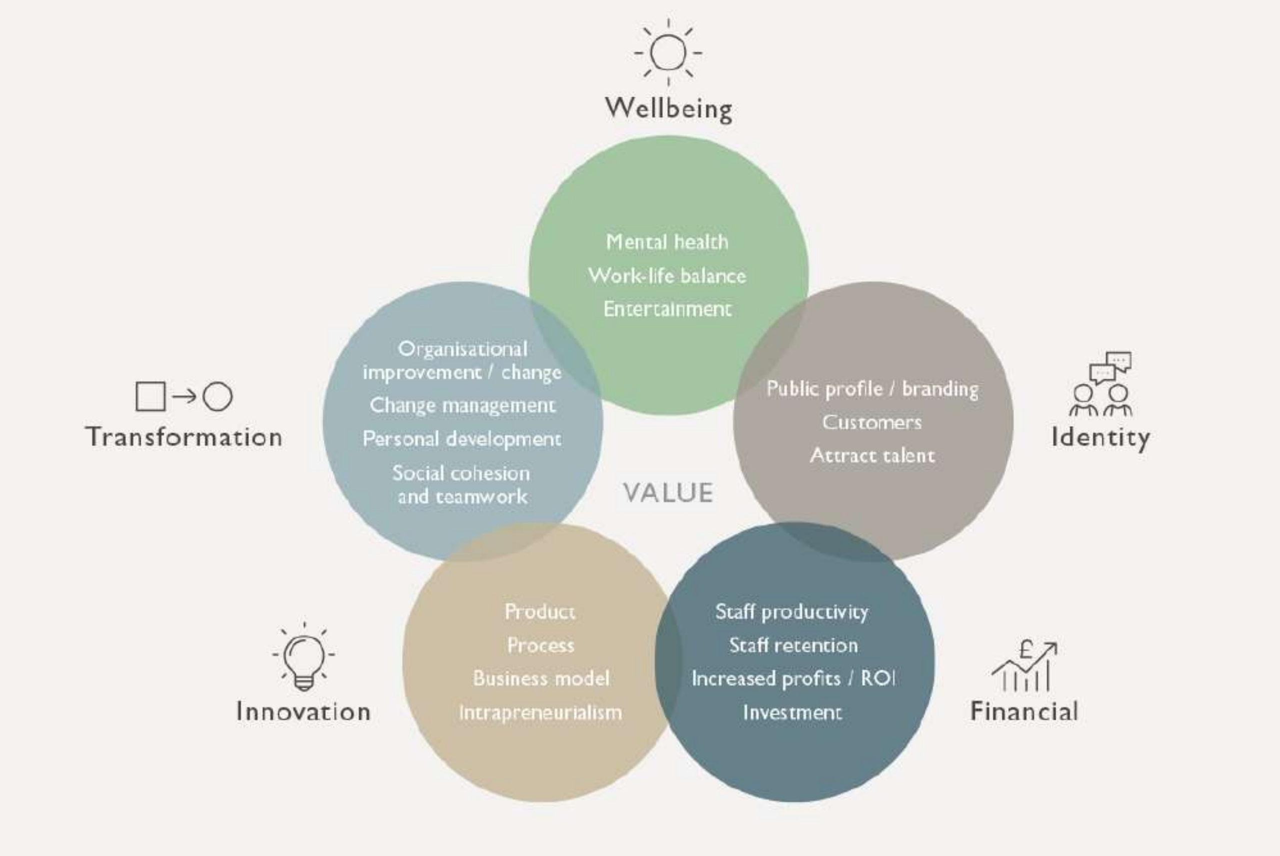
This project consisted of two distinct phases: a period of thorough desk-based research, to scope the existing evidence of the benefits of creativity in business, followed by extensive stakeholder engagement, to test these findings and ascertain the current landscape of cross-sectoral collaboration in Culture Mile and the City more broadly.

9.8.3 The outcomes

The research found that creativity catalyses a wide variety of benefits. Within participating corporate and creative organisations, these advantages can be on an individual and collective level: for employees, for teams and for the business itself. Effects may be short or long-term, depending on the nature and duration of the project. The outcomes can be grouped according to five themes that encompass benefits for the creative and non-creative businesses. However, this list is not exhaustive, and the benefits are not mutually exclusive.

[112] https://www.culturemile.london/

Image: Typology of benefits framework



9.8.3.1 Wellbeing

- Mental health
  Arts interventions and creative art therapies have been shown to reduce stress in employees by 81%.[113] Creativity can also improve mental health by ensuring staff are working in a pleasant, well-designed environment. In a study by Cass Business School, 80% felt that art in the workplace improved their sense of wellbeing.[114]
- Work-life balance
  Allocating time to work on wider business issues can enable employees to explore their own ideas and develop their skill set - benefiting the business either in the short-term (new products) or long-term (new skills). Facilitating access to creative or cultural activities can also reduce the risk of burnout: participatory art and art therapy 'addresses [burnout] by engaging the creative process to re-energize people while identifying commonalities and empathy with co-workers.'[115]
- Entertainment
  Creative activities can be an important way to keep staff happy and entertained. According to a recent study, engaging in creative activities can lead to an 'upward spiral' of positive emotion and psychological wellbeing.[116] This can lead to greater job and personal satisfaction. Happiness is key to a productive, healthy workforce, and has been shown to raise sales by 37% and accuracy on tasks by 19%.[117]

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113 Lily Martin et al., 'Creative Arts Interventions for Stress Management and Prevention – A Systematic Review,' Behavioural Sciences 8: 28 (2018).
114 Ingham, 'Say Hello to the Online Art Rental Market; can it make a dent in a $50bn industry?' Forbes, 23 April 2015, accessed online: https://www.forbes.com/sites/edmundingham/2015/04/23/say-hello-to-the-online-art-rental-market-can-it-make-a-dent-in-a-50bn-industry/#3f5585c74ab8.
115 'Can Art Therapy Defuse Teacher Burnout?' Columbian College of Arts & Sciences, George Washington University, 9 May 2018, accessed online: https://columbian.gwu.edu/can-art-therapy-defuse-teacher-burnout.
116 Tamlin Conner, Colin DeYoung and Paul Silvia, 'Everyday creative activity as a path to flourishing,' The Journal of Positive Psychology, 13:2, (2018), accessed online: https://www.tandfonline.com/doi/full/10.1080/17439760.2016.1257049?scroll=top&needAccess=true.
117 Shawn Achor, 'The Happiness Dividend,' Harvard Business Review, 23 June 2011, accessed online: https://hbr.org/2011/06/the-happiness-dividend.

9.8.3.2 Identity

- Public profile / branding
  Sponsorship of the arts can help ensure organisations have a positive public image as a multifaceted and philanthropic patron of culture. Creativity can more directly impact a company's brand through the generation of new ideas for marketing that promotes a particular message or identity. Indeed, 45% of customers expect great design across marketing and sales collateral.[118] By investing more in a creative approach to branding, companies can achieve success. Coca-Cola are constantly reviewing their brand, and since 2007 have worked with creative design agency Turner Duckworth to revitalise their packaging and visual identity.[119]
- Customers
  Reputation is integral to attracting and retaining customers. Cultural projects can help an organisation strengthen ties with the local community or consumers and bolster their public profile: 'a [cultural] partnership serves to strengthen relationships with key clients by establishing cultural bonds and demonstrating shared values.'[120] Collaborative projects can also be used to interrogate ways in which companies interact with customers, and developing a positive brand is essential to financial success: 70% of customers say they would avoid buying a product if they don't like the company behind it.[121]
- Attracting talent
  Cultivating an attractive working culture through the integration of creativity in organisational strategy, daily practices and management processes can help make a company an attractive proposition for the best potential employees. The World's Most Attractive Employers (WMAE) 2019 list demonstrates 'the growing need for flexibility at work, work-life balance, and celebrating fun at work… as a key element of [company] culture.'[122] When applying for a job, 84% of job seekers say that the reputation of a company as an employer is important - so businesses need to remain competitive.[123]

9.8.3.3 Financial

- Staff productivity
  Creative activities can help reduce stress among employees, currently a significant cause of work absenteeism: a study has shown that 'art making can lower cortisol levels regardless of prior experience with art, media type, or demographics.'[124] By ensuring staff are happy at work, businesses can see an increase in productivity by up to 20%.[125] Art in the workplace specifically can influence productivity among employees, with a 17% increase.[126]
- Staff retention
  Creative collaborations can have a focus on mental health and wellbeing, as well as skills development. Providing staff with opportunities and space to focus on themselves can lead to a happier workforce through triggering an 'upward spiral' of wellbeing, meaning businesses will be less likely to lose staff to alternative employment.[127] As identified in the WMAE list, a strong brand can be enhanced through creative activity; this can also lead to a 28% increase in staff retention.[128]

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118 Hannah Hagee, '30 branding stats and facts,' Lucidpress, 19 November 2019, accessed online: https://www.lucidpress.com/blog/25-branding-stats-facts.
119 'The power of branding,' Design Council, accessed online: https://www.designcouncil.org.uk/news-opinion/power-branding.
120 Ragnar Lund and Stephen Greyser, 'Corporate Sponsorship in Culture – A Case of Partnership in Relationship Building and Collaborative Marketing by a Global Financial Institution and a Major Art Museum,' Harvard Business School Working Paper, 2015, accessed online: https://www.hbs.edu/faculty/Publication%20Files/16-041_0a81dd11-2e2f-459c-8eca-008f24bb313e.pdf.
121 In Reputation We Trust,' Weber Shandwick.
122 'World's Most Attractive Employers 2019,' Universum, October 2019, accessed online: https://universumglobal.com/blog/worlds-most-attractive-employers-2019/.
123 '65 HR and Recruiting Stats for 2018,' Glassdoor.
124 Girija Kaimal, Kendra Ray and Juan Muniz, 'Reduction of Cortisol Levels and Participants' Responses Following Art Making,' Journal of the American Art Therapy Association, 33:2 (2016), accessed online: https://www.tandfonline.com/doi/full/10.1080/07421656.2016.1166832?journalCode=uart20#.V2GKm-YrI6g.
125 Daniel Sgroi, 'Happiness and Productivity: Understanding the Happy-Productive Worker,' SMF-CAGE Global Perspective Series, October 2015, accessed online May-June 2019, https://warwick.ac.uk/fac/soc/economics/staff/dsgroi/impact/hp_briefing.pdf.
126 'Designing your own workspace,' University of Exeter.
127 Conner, DeYoung and Silvia, 'Everyday creative activity as a path to flourishing.'
128 '65 HR and Recruiting Stats for 2018,' Glassdoor.

- Increased profits / ROI
  A study by McKinsey has shown that companies who place greater emphasis on creativity perform better financially: 'creativity is strongly correlated with superior business performance.'[129] Creativity needs to be evident in daily practices and in the agility and adaptability of staff - skills that can be enhanced through creative activities. The productivity and retention of staff, as described above, can lead to a tangible return on investment.
- Investment
  With the decreasing stability of the stock market, organisations can make relatively stable investments through building up an art collection. Collecting and commissioning artworks could also bring in future profits: fine art pieces grow in value over time, while investing in rising artists is relatively low risk.[130]

9.8.3.4 Innovation

- Product (Research & Development)
  Creativity can help employees be more inventive and daring in the development of new products for markets. A study found that groups with even a minimum of training in creative principles and tools generated 350% as many ideas as their untrained counterparts, and the ideas were 415% more original.[131] Collaborative projects or interventions are often concentrated in Research and Development departments specifically with the aim to improve goods or services. Bosch runs an artist-in-residency programme at their research centre whereby artists work among and with researchers 'to exchange ideas and engage in dialogue.'[132]
- Process
  Thinking in new ways is becoming essential as businesses adapt their organisational processes to ensure future sustainability. By implementing a new or improved production or delivery method - be it a technique, equipment or software - businesses can become more resilient. Harvey Seifter notes that 'more than 400 of America's Fortune 500 companies use artistic skills, processes and experiences to foster creative thinking and innovation processes.'[133] IBM was one such company that reacted and adapted to the changing economy, employing 1,000 professional designers to transform the culture and operational processes from within, and providing senior staff with design training.[134]
- Business (Model)
  When applied at a strategic level, creativity can have the greatest impact on profit margins: in the US, design-driven companies have outperformed the S&P 500 Index by 211% over 10 years to 2015.[135] Reconceptualising organisational structures, challenging linear processes and adapting to customer needs can lead to innovative and future-proof business models. Airbnb integrated design thinking to turn around their fortunes, positioning themselves as the customer and developing their product accordingly.[136]
- Intrapreneurialism
  When radical ideas and innovative thinking can be integrated in a pre-existing working environment, employees are encouraged to develop novel products and/or services in-house. Google encourages intrapreneurship among employees by offering their workforce to spend 20% of their contracted time on personal projects relating to the business; Gmail was one such project that today drives key traffic to other Google products.[137]

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[129] Brodherson, Heller, Perrey and Remley, 'Creativity's bottom line.'
[130] Katie Hope, 'Could buying paintings make you rich?' BBC, 16 November 2017, accessed online: https://www.bbc.co.uk/news/business-42011989.
[131] Gerard J. Puccio et al., 'Creative Problem Solving in Small Groups: The Effects of Creativity Training on Idea Generation, Solution Creativity and Leadership Effectiveness,' The Journal of Creative Behaviour, 24 September 2018, accessed online: https://doi.org/10.1002/jocb.381.
[132] 'Wanted: lateral thinkers – Creative spaces for innovative minds at Bosch Renningen,' Bosch, accessed online: https://www.bosch.com/stories/artist-in-residence/.
[133] Harvey Seifter, 'Artists Help Empower Corporate America,' Arts & Business Quarterly Online, Spring 2004, accessed online: http://www.artofsciencelearning.org/arts-based-learning/.
[134] Lohr, 'IBM's Design-Centered Strategy.'
[135] Jeanne Rae, '2015 dmi: Design Value Index Results and Commentary,' Design Management Institute, December 2016, accessed online: https://www.dmi.org/page/2015DVIandOTW.
[136] 'Airbnb, a Design Thinking success story,' BBVA, accessed online: https://www.bbva.com/en/airbnb-design-thinking-success-story/
[137] Stuart Thomas, 'How Google encourages innovation among its employees,' Engage Me, 13 September 2017, accessed online: https://engageme.online/google-innovation-employees/.

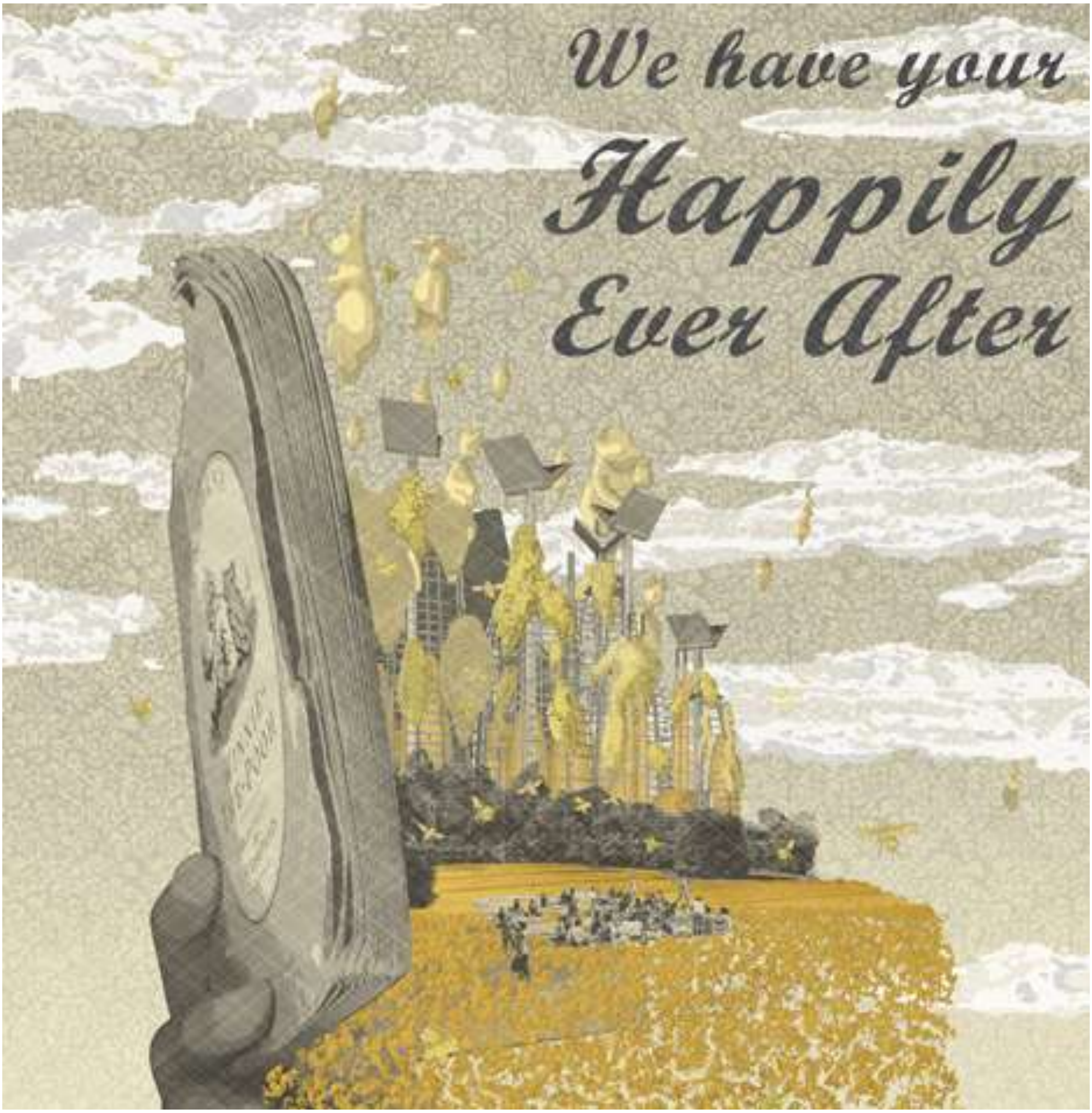
9.8.3.5 Transformation

- Organisational change
  McKinsey have estimated that 70% of change programmes fail to achieve their goal, in large part due to employee resistance.[138] By challenging linear processes and the status quo, creative thinking can help streamline methodologies, procedures, hierarchies and management processes. Lego developed an online co-creation platform in a creative approach to improve communication; initially made for customers, the platform became a fundamental asset to co-producing organisational change with their employees.[139]
- Change management
  Implementing the transformations described above requires effective change management. The creative, people-focused techniques required to help make these transitions can be improved among staff through creative collaboration, and arts-based learning is increasingly used in the United States to enhance employee skills in change management.[140]
- Personal development
  Transformation can also take place on an individual level. Creativity, made manifest in dedicated activities or in the workplace, can enable employees to develop their soft skills, cognitive skills, competencies and confidence: the neuroscientist Aracelli Camargo notes that working spaces that 'use art to keep constant change' are neurologically stimulating, improving performance 'in hippocampus-dependent learning tasks such as problem solving, idea generation and cognitive flexibility.'[141] Personal development can improve the intellectual capital of the business, leading to a stronger talent pool.
- Social cohesion and teamwork
  Creativity as an enabler of social cohesion has been studied in an urban context, and the findings can be translated into a business environment.[142] Companies use arts-based learning programmes to 'strengthen employee skills in collaboration and conflict resolution.'[143] Working together can help overcome challenges, resolve conflicts and strengthen relationships, which can lead to more effective teamwork on a daily basis.

9.8.3.6 Relevance to NWQ

Culture Mile is an example of how Slough North West Quadrant could play a role in cross-sectoral collaboration. The site could pioneer new initiatives on innovation and cross-sector connection, built on the added value creativity and culture bring to the businesses located within the area.

[138] Boris Ewenstein, Wesley Smith and Ashvin Sologar, 'Changing Change Management,' McKinsey, July 2015, accessed online: https://www.mckinsey.com/featured-insights/leadership/changing-change-management.
[139] Carsten Tams, 'The Co-Creation Imperative: How to Make Organizational Change Collaborative,' Forbes, 11 February 2018, accessed online: https://www.forbes.com/sites/carstentams/2018/02/11/the-co-creation-imperative-how-to-make-organizational-change-collaborative/#6d1102902e91.
[140] Seifter, 'Artists Help Empower Corporate America.'
[141] Ingham, 'Say Hello to the Online Art Rental Market.'
[142] Teresa Garcia Alcarez, 'Creativity: A Driver and Enabler of Social Cohesion,' kult-ur revista interdisciplinària sobre la cultura de la ciutat, 4: 307-324 (2018), accessed online: https://www.researchgate.net/publication/322536122_Creativity_A_Driver_and_Enabler_of_Social_Cohesion.
[143] Seifter, 'Artists Help Empower Corporate America.'



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