

# Lead Specialist Advisor

Clair Hall: Interim Report

June 2022

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**BOP**  
Consulting

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# 1. Introduction

## 1.1 Our brief

BOP Consulting is an international consultancy specialising in culture and the creative economy, established in 1997. We have worked with numerous clients on reimagining spaces and developing exciting cultural projects. Underpinning all of our work is our commitment to robust evidence, clarity of core purpose and contextualised recommendations.

BOP Consulting were appointed by Mid Sussex District Council (MSDC) in April 2022 to explore the feasibility and development of Clair Hall - a community, cultural and leisure facility in Haywards Heath. The site has been inactive as a cultural and leisure venue since Spring 2020 as a consequence of the pandemic. It is currently being used by the NHS, as a vaccination centre. MSDC recognises the value of Clair Hall as a cultural and leisure space for local residents and are keen to see the venue utilised once again to its full potential and for this purpose.

As this report covers arts, culture, and leisure, it is important that we make a clear distinction between the terms. We acknowledge culture as the creative processes and storytelling experienced by individuals through a range of art forms. These include, but are not limited to, theatre, dance, music, and literature. We understand leisure as the activities undertaken by individuals which benefit their health and wellbeing. We recognise that culture can be a part of leisure and we have been asked to focus on culture led options that combine these two concepts.

### The site

Clair Hall is a multi-purpose venue built in 1971, as part of a civic complex. The site, which overlooks Clair Park at its rear, includes Clair Hall itself, the Redwood Centre and a car park. Clair Hall is located on Perrymount Road, Haywards Heath (RH16 3DN) and is a short walk from Haywards Heath train station. The Clair Hall building covers 1,306m<sup>2</sup> and consists of a large main hall

(including raised staging), a function suite/ a studio space, a studio, dressing rooms, a kitchen, office accommodation and a bar area.

Whilst not located within a hub, the site is supported by its proximity to food and beverage retailers on the high street. Within a 5-minute drive of Clair Hall individuals can access Waitrose, Sainsbury's and Marks and Spencer supermarkets as well as several restaurants.

## 1.2 Report summary

During Phase A of the project, we have established that MSDC is right to be focussing on cultural provision to activate the Clair Hall site as:

- The wider community benefits of investing in culture are well evidenced
- We can see the potential for culture to be a driver of MSDC's wider strategies for Haywards Heath
- A cultural offer on the site is well positioned to benefit from / capitalise on existing investment in the area e.g. the Coast to Capital project

We have undertaken a mapping exercise to understand the cultural landscape of Haywards Heath and its surrounding area.

Our mapping shows that Haywards Heath's cultural ecosystem is fairly typical for a town of its size. For a small number of the indicators, it is well provided for. For example, there are a good numbers of theatres, cinemas, libraries and community centres within a 30 minute drive time. But Hayward Heath's lack of any regionally significant/unique cultural assets suggests room for the ecosystem to be developed further. This is supported by:

- Its location within a wider region that encompasses a number of cultural 'hot spots' that have received considerable investment in recent years
- Its well-connected location
- Evidence that the existing demographic in Haywards Heath skews towards a culturally highly engaged population, with just over half of all residents counting as "highly engaged" compared with 20% of households nationally

We have worked closely with the Clair Hall Members Steering Group to develop a definitive success criterion for the activation of the site. These establish the context and expected outcomes from the site under the following headings:

**Financial** – the financial parameters within which options for the site will be developed.

**Strategic Impact** – the social, economic and/or cultural impact that options for this site will deliver, and how the activation of the site will align with existing strategies.

**Profile and Ambition** – the level of ambition for the site and what sort of profile MSDC expect to see for the site.

This report covers the work completed in Phase A of the project. It considers the local and wider context for cultural/community provision in Haywards Heath, potential audiences, the cultural landscape of Haywards Heath (and beyond). It then details the agreed success criteria, before considering viable options for the development of Clair Hall, which will be further explored in Phase B.

In Section 6 we outline our proposed approach for Phase B of the project and throughout the report highlight areas we intend to explore further in Phase B using *italicised blue text sections*.

At this point in the project we think that activating the site as some form of community/cultural hub, within the agreed financial parameters and within the current funding climate, will be challenging. The approach we've outlined for Phase B of the project (see section 6) will help to better establish what interest in the site there might be and what the market views as key drivers for investment.

We anticipate that MSDC will need work to keep the process as open as possible to allow opportunities to present themselves and for the council to take advantage of these.

## 2. The context for cultural/community provision in Haywards Heath

### 2.1 The business case for arts and culture for towns and cities

MSDC are right to be focussing this opportunity on culture as there is strong evidence that culture helps raise the profile of places, in turn celebrating their distinctiveness. In doing so, culture can support property values and commercial occupancy by attracting visitors and increasing dwell time and spend in retail destinations.

Culture is therefore increasingly seen by retail centres and Business Improvement Districts (BIDs) as a powerful way to deliver unique experiences and to attract and sustain visitor footfall and spend.

Many visitors whose primary purpose is to attend a cultural activity or event within a venue also spend money in local shops, cafes, attractions and accommodation on their visit. This is spending that would not have occurred without the cultural venue or event that has brought them into the area. Therefore, investing in culture helps to generate new footfall and spending that benefits tenant businesses and enables them to pay higher rents.

Cultural production can also have a positive impact on communities by providing opportunities for residents to develop new skills, creating local jobs, and improving community cohesion. Culture promotes a common understanding of traditions and values that can help to establish community networks.

However, embedding culture into towns in a way that realises these benefits is challenging and even more so if there isn't already an established ecosystem, ideally one with regionally significant cultural organisations in it. Towns that successfully establish or develop their cultural ecosystems typically do so over decades and through systemic financial and strategic investment. They are also usually prepared to carry a certain level of risk while establishing what does/doesn't work for their town.

### 2.2 The wider context

Mid Sussex is a local government district in West Sussex, which includes the towns of East Grinstead, Haywards Heath, and Burgess Hill. Situated near Gatwick airport and between London and Brighton, the district has excellent connectivity. Mid Sussex is included in the Greater Brighton City Region, one of the UK's largest and best-established creative clusters. Made up of six local authorities, the region's cultural industry is reported to contribute £1.5 billion towards the economy<sup>1</sup> across sectors including music, arts and crafts, computer software and games, and publishing.

Greater Brighton is home to 14 of Arts Council England (ACE)'s National Portfolio Organisations (NPO) – an arts/cultural organisation receiving substantial investment by ACE in addition to having a wide reach due to the breadth and quality of its organisations. It is well known for its cultural calendar which includes events such as Brighton Festival & Fringe, CINECITY, Love Supreme Jazz Festival and Brighton Photo Biennial. There is substantial growth across Greater Brighton in the last 5 years, where pockets of the region have attracted investment to support its innovation and development.

Crawley was recently selected as a priority area for ACE, which has since invested £1m into a three-year programme that cultivates creativity across the town. Building on the area's strong cultural history, the investment will back a consortium of 6 Crawley-based organisations to encourage artists, producers,

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<sup>1</sup> Siepel, J (2019), Creative Industries in Greater Brighton, A research note by the Creative Industries Policy and Evidence Centre. SPRU, University of Sussex

and audiences to engage in a range of cultural forms, whilst providing opportunities for upskilling.

Another driver of creative growth locally is the Levelling Up Fund, where both Eastbourne Borough Council and Lewes District Council were successful in their bids seeking funds to support the regeneration of the towns. Eastbourne Borough Council received £19.85m to boost cultural provision across the district, with projects including the design and construction of a cultural district, the creation of a culture and education centre at Black Robin Farm and the investment of public legacy artworks. Meanwhile, Lewes District Council received £12.68m to re-establish its maritime industries and to develop a vibrant community destination.

Investment in the region has also been observed at a grass roots level where creative and cultural venues have benefitted from the government's Cultural Recovery Fund (CRF) in reviving programming for local audiences. Creative organisations in Brighton & Hove received £7.5m in support, whilst in Mid Sussex organisations including Ensemble Reza, Orion Cinema, Chequer Mead Arts and Community Trust, and Scott Cinema have secured CRF assistance.

As with other creative clusters, the impact of the pandemic on Greater Brighton's cultural industry has been profound. Hatch<sup>2</sup> found that the arts and entertainment sector experienced the largest loss as a percentage of GVA, and it is estimated that, without the CRF, the region would have faced more than 50% of job cuts across the creative sector. As the region comes through the pandemic, we foresee a strong platform for culture to succeed in Greater Brighton.

## 2.3 Local strategic context

MSDC has historically taken a strategic approach to the development and support of leisure and culture in the district. Whilst their last Leisure and Culture

Strategy<sup>3</sup> is no longer live, the council sets a clear trajectory for growth and improvement through the town centre masterplan for Haywards Heath, and the adoption of the town council's neighbourhood plan.

The overall development of Haywards Heath is currently heavily focussed on economic growth and improving the quality of life for those living and working in the town. These are holistic strategies where community/cultural facilities and the Clair Hall site itself can be strategic drivers.

Recognising the holistic approach currently adopted by the council, whereby culture is positioned as a driver to deliver strategic objectives through several strategies, we have identified opportunities within strategic documents which we believe provide a space for culture to play a role in their delivery.

The Haywards Heath Town Centre Masterplan, Supplementary Planning Document supports the long-term vision for Haywards Heath as a destination that aims to:

- Strengthen its position as 'The Heart of Mid Sussex', encouraging economic recovery and growth by ensuring investment and development is focused on nurturing community and attracting people to visit, work and live in, the town centre
- Protect, integrate and enhance the town's significant green spaces which provide both a context for making connections and a place to reflect, relax and hold cultural events and activities to enhance the vibrancy of the town
- Create key positive and welcoming gateway moments to clearly defined the arrival into the town centre
- Provide a framework for enhancing the opportunity to live in the town centre, giving life to the town centre's overall viability and the opportunity to give momentum to a flourishing evening economy

<sup>2</sup> Hatch (July 2020), Greater Brighton Economic Board Covid-19 Impact Assessment. Available at: <https://democracy.brighton-hove.gov.uk/documents/s155847/GBEB%20Covid%20Report%20HATCH%200005.pdf>

<sup>3</sup> Leisure & Cultural Strategy for Mid Sussex 2009-2020

Alongside this, Haywards Heath's Neighbourhood Plan highlights an ambition to enhance community facilities for the growing population. The Neighbourhood Plan looks to:

- Improve sports and leisure facilities within the town where possible and support the retention and enhancement of community facilities.

Both plans present opportunities for culture to serve as a driver to achieve the town's objectives. Through culture, Haywards Heath could see an increase in job creation, cultural tourism and cultural capital, with significant impact for the town's economic growth. The plans also offer the possibility of using tangible forms of culture to deliver the identified objectives, such as developing cultural programmes for community venues, planning and hosting cultural events, and using visual arts for the design of the proposed gateway makers.

## 2.4 Technological Infrastructure

Since 2018 the councils of West Sussex have collectively and individually been working to develop their digital credentials and have a shared ambition to enable the foundations of a well-planned digital infrastructure. Working together, the councils have implemented county wide 'full fibre' and gigabit-capable broadband coverage.

Mid Sussex District Council have embarked on a project to develop a full fibre network which runs through Haywards Heath and the wider LEP (Coast to Capital) – essentially improving digital connectivity across the district, including in Haywards Heath. The project aims to provide gigabit capable full fibre infrastructure that will support increases in productivity across a range of urban, semi-urban and rural economies. It is envisaged that by 2030 the district will be ranked alongside the most productive places in the UK. This area will provide the necessary skills and infrastructure for a global economy based on trade and technological innovation and it is able to maximise the competitive advantage of its proximity to London and the international gateway of Gatwick.

It is hoped that through its involvement in the Coast to Capital project, the district and wider area that the project covers will position itself "as a business destination as part of the wider South East, which contains some of the UK's most highly-regarded academic and innovation assets"<sup>4</sup>.

Developments such as the approval of a high-quality Science and Technology Park in Haywards Heath (creating 100,000m<sup>2</sup> of employment floorspace and 2,500 new jobs, around 50% of which would be for new graduates) and the recent relocation to Haywards Heath of Quantum Computing are in part creditable to the progress of the digital infrastructure developments in the locality.

### 2.4.1 The relevance to Clair Hall

There are a number of reasons that we might consider the technological infrastructure of the area when looking at models / options for the activation of Clair Hall including contributing to the 'liveability' of the town and exploring options for the site that centre on 'creative digital'.

**Liveability** - As the infrastructure improvements drive more businesses to look at the possibility of locating to the area, businesses will be looking at other factors beyond the technological infrastructure including liveability in the local area for their employees. Along with cost and access to skills, liveability has long been a dominant factor in the identification of potential locations for businesses.

“ Liveability is the new battleground for corporate and economic success. Towns and cities have already taken note, and companies need to catch up. Corporate location decisions will be less 'easy street' and more 'local high street'. Street art in time might become a more interesting signifier of an attractive location than the glass and steel vista – especially for those in

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<sup>4</sup> The Coast to Capital, Strategic Economic Plan, 2018-2030



the tech sector looking for the latest bright young things. Places need to be vibrant, accessible and diverse to attract skills.<sup>5</sup>

The right activation of the Clair Hall site could enhance town centre living, providing activities and delivering impact within and outside of 9am – 5pm, and fill identified gaps in local cultural/leisure provision in Haywards Heath and beyond – all of which will feed into the area’s ‘liveability’.

**Creative digital** - There may be organisations interested in the site who wish to establish a cultural/community offer that capitalises on the exceptional digital infrastructure of the area. We understand that in Horsham for instance there is a cluster of e-gaming businesses which may present opportunities for the wider area and that increasingly operators of studio spaces are looking for high-grade digital infrastructure to support resident digital creatives. An offer on the Clair Hall site routed in creative digital would also present the option to provide something not already offered in the town – something unique.

*In Phase B we will use a series of consultations with industry experts and market leaders to better understand the opportunities for collaboration between the creative and digital sectors and to see if there might be any opportunities in the site for tech/digital led cultural/community facilities.*

## 2.5 Public sentiment

There is demonstrable positive public sentiment towards Clair Hall and interest in its future. This is evident through the consultation work completed by Engage Communicate Facilitate (ECF) and the work of the local campaigning group, Save Clair Hall for instance.

ECF undertook a 12-week engagement process which included community workshops, an engagement website, drop-in sessions and a dedicated email and telephone line. ECF’s report outlined a desire by consultees for Clair Hall to be refurbished and retained as a multifunctional community centre with ancillary

facilities including a kitchen and technological equipment. It also outlined the aspiration from some consultees for the site to be redeveloped / rebuilt to function as an arts/entertainment venue, modelled on the popular ‘Depot’ in Lewes. Consultees also expressed an ambition for the Clair Hall to be equipped with modern facilities such as retractable and tiered seating and partition walling.

Whilst the sample of respondents was less than representative of the local community in Haywards Heath, these findings provide us with some understanding of the attitudes towards culture in Haywards Heath, alongside outlining suggestions for the development of Clair Hall.

The campaign Save Clair Hall gives further insight into local aspirations for the space. The group, which has been campaigning since September 2020 for the building to be re-opened to the public, consider the site to be the only existing local facility that has the capacity to support culture in Haywards Heath and its surrounding areas. Whilst this public sentiment is not an analysis of demand in Haywards Heath, it provides us with an indication of ambitions for the site from some residents within the district.

We must also be mindful of any future demographic shifts in Hayward’s Heath and how this might impact the local need/demand, which we explore in the following section 3 of this report.

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<sup>5</sup> <https://www.investmentmonitor.ai/insights/why-liveability-matters-more-than-ever-when-it-comes-to-investment-attraction>



## Key takeaways

- MSDC are right to focus on purposing this site for culture as the broad benefits of investing in culture for communities are widely evidenced. There is demonstrable community support for this approach. But adopting this approach won't be without its challenges.
- Much of the areas surrounding Haywards Heath have vibrant cultural ecosystems that have received healthy levels of investment in recent years.
- There are opportunities for cultural provision in Haywards Heath to benefit from / capitalise on regional investment into projects such as the Coast to Capital project.
- There are opportunities for cultural provision to contribute to MSDC's current strategic approach to the development of Haywards Heath.

## 3. Audiences

As we are focusing on culture led options for Clair Hall, in this section we look at the current and future audience profile for any cultural offer on the Clair Hall site, as well as the impact COVID-19 has had on audiences. Audience Spectrum segments<sup>6</sup> the whole UK population by their attitudes towards culture, and by what they like to see and do. It is the most accurate tool the sector has ever had to help target audiences and include a wider public. Although Audience Spectrum predominantly tells us about audience consumption, it also provides indicators for likely participation in cultural activities.

### 3.1 Current audiences and participation

Using Audience Spectrum data for Haywards Heath (see Figure 1), we are able to see that the general population is highly engaged with culture and the arts, with two thirds of residents belonging to three of the top four most engaged Audience Spectrum segments<sup>7</sup>:

- **Commuterland Culturebuffs (32%):** Individuals within this segment have broad tastes, but a leaning towards heritage and more classical offerings. Open to high quality offerings, they have the financial means to attend regularly. They are particularly interested in opportunities that offer exclusive access or added value, such as talks and tailored content that help develop their loyalty. They are most likely to attend ballet performances, and least likely to attend carnivals. Locally this segment is likely to attend events such as NT Live, regional touring theatre performances and professional musicians performing classical music.
- **Dormitory Dependables (23%):** This segment represents the largest proportion of the UK population. They enjoy museums and the arts, particularly popular and mainstream events. They are most likely to attend a pantomime or live music gig, and least likely to attend 'high culture' events

<sup>6</sup> See Appendix A for more information on Audience Spectrum segments.

<sup>7</sup> Note, the low percentage of Metroculturals is representative of their high-density concentration in London and limited existence outside of the capital. Their higher levels of representation within the profile of a 30-minute

drive like opera. Locally, this segment is likely to attend events such as pantomime, comedy performances and free music festivals.

- **Experience Seekers (19%):** A younger-leaning, lively and active cohort of busy, mixed prosperity professionals, from a wide range of backgrounds and at a variety of different life stages. Open to a breadth of experiences, but with a clear leaning towards the contemporary and culturally specific, this group particularly enjoys immersive and participatory arts. Unusual combinations will grab their attention (e.g., roof top cinema, late night openings, site-specific programmes) and they are unlikely to want to miss out on the latest 'blockbuster' offering, regardless of art form. Locally this segment is likely to attend events such as regional touring contemporary dance performances, open mic / spoken word performances and short-term pop-up culture events.

The above data suggests that there is an appetite for engaging with culture in Haywards Heath, although it does not mean that the population will necessarily look to provision within the town for its cultural consumption. Instead, wider infrastructure, such as easy and regular transport links to Brighton and London, and high-quality provision in those places are likely to be drawing audiences further afield.

When comparing the current population with the wider population living within a 30-minute drive time, it is noticeable that Commuterland Culturebuffs are significantly more represented in the local population of the town, suggesting that these are a key "bread and butter" audience for any activity within the town. In contrast, there are significantly fewer residents from the Trips and Treats (generally families with school-age children) and Kaleidoscope Creativity (mixed age groups from urban areas with low engagers) suggesting that activity targeting these groups would need to be sufficiently well communicated to draw people in from the surrounding areas.

drivetime at Figure 1 is due to this area reaching Brighton, which has an unusually high prevalence of Metroculturals.

**Figure 1 Audience Spectrum profile for Haywards Heath compared with 30 minutes drivetime**

Segment	Likelihood to engage with culture	Haywards Heath residents		30-minute drivetime residents	
		Number	%	Number	%
Metroculturals	Most ↑          Least	293	1%	26,040	5%
Commuterland Culturebuffs		10,161	32%	115,697	22%
Experience Seekers		6,088	19%	86,478	16%
Dormitory Dependables		7,375	23%	118,747	22%
Trips and Treats		2,288	7%	60,473	11%
Home and Heritage		2,070	7%	38,521	7%
Up Our Street		769	2%	24,620	5%
Facebook Families		1,814	6%	32,079	6%
Kaleidoscope Creativity		156	0%	19,243	4%
Heydays		378	1%	7,894	1%

Source: The Audience Agency 2022

All three of the dominant Audience Spectrum segments in Haywards Heath are more likely than average to have been involved in creative pursuits, with their likelihoods for participating matching their overall engagement rankings. Commuterland Culturebuffs are also the most likely segment to volunteer, particularly for heritage and arts organisations. Around 35% of this segment do so each year, equivalent to 11% of the Haywards Heath population.

### 3.2 Future audiences and participation

Looking specifically at the demographic changes that could be expected in Haywards Heath, work undertaken by Mid Sussex District Council in 2016<sup>8</sup> suggested that overall population growth over the 15 years to 2031 will rise 11.6%, however the working age population will only rise 3.5%. Indeed, projections suggest that when looking at the population as a whole, the working age population will decrease compared with other groups, accounting for 57% of the total population compared with 62% in 2016. A large part of this shift is due to the aging demographic of the area combined with an expected increase in life expectancy, which is already higher than average in Mid Sussex. There were also predictions of decreases in both the number and proportion of 24 – 34-year-olds in the area. The combination of these shifts is likely to mean that Experience Seekers become less prevalent within the population whilst Commuterland Culturebuffs become more dominant, particularly the C2 subsector of the segment.<sup>9</sup>

The first statistical releases from the 2021 census are expected in summer 2022. This will provide an additional understanding of the demographic changes that have taken place within Haywards Heath in the last decade and understand whether the predictions for 2031 remain on track. This additional understanding can help to further understand the likely future needs of the local population in relation to audiences and participants.

<sup>8</sup> District Plan Sustainability Appraisal, Submission Report, Mid Sussex District Council, August 2016.

<sup>9</sup> Defined as “wealthy empty-nesters with comfortable, rural lifestyles” <https://www.theaudienceagency.org/audience-spectrum/commuterland-culturebuffs/subsegments-c1-c2>

### 3.3 The impact of COVID-19 on local audiences / demand

The COVID-19 pandemic has altered the way people consume and engage with the cultural sector. Towns and cities across the UK are still adapting to the impacts of the pandemic, and although audiences are returning to the cultural sector, progress to date has been slow.

One of the biggest observed shifts has been a far larger proportion of the population working from home more regularly. This is likely to have a longer-term impact on local high streets, with more people more readily able to access their local area and, through this, greater demand on localised provision. Whilst there have been some high profile calls for a return to the office in recent months, overall, the anticipation is that some form of hybrid working is likely to remain in the longer term as workers demonstrate that being present in the office is not synonymous with high output.

The most recent statistical release on home and hybrid working by the Office for National Statistics<sup>10</sup> evidences this, showing that a quarter of workers are hybrid workers, whereby they split their time between home working and working from an office, with the majority favouring more time working from home. Research suggests this is particularly the case for those aged 30 to 49, in part likely to reflect wider lifestyle benefits of working from home (e.g., flexibility around childcare, improved work / life balance). There were some initial suggestions that this would also drive a “flee to the country” from major cities, although it is too soon to know whether this will be a longer-term impact of the COVID-19 pandemic.

Work by the Local Government Association around resilient high streets<sup>11</sup> suggests that it is important for high streets to make sense in their local context, and that there is an increased interest in local communities and localism as a result of the pandemic. This also has bearing on the wider Levelling Up agenda that the Government introduced in February 2022, which places an emphasis

on the importance of pride in place and the role that culture plays in creating this sense. Similarly, there has been a growing proportion of councils and areas placing culture at the heart of their COVID-19 recovery, recognising that creating opportunities locally will help to support residents to feel more secure in visiting their local areas whilst also drawing in visitors from elsewhere.

Alongside this, increased use of the high street as a social destination is a pre-pandemic trend and the expectation is that this will continue. Providing places that people want to go to visit and experience, will increase footfall and consumption. Furthermore, a well-developed creative offer is often part of the package that residents will expect, providing something to “do” as well as places to meet and socialise.

Following the pandemic, early indicators suggest that the COVID-19 pandemic is changing audience and participant behaviours.

Although the Taking Part survey is no longer running, DCMS have commissioned Kantar to run the Participation Survey, a push-to-web survey providing data on adult engagement with DCMS sectors at a county and regional level.

The first release of Participation Survey data took place in April 2022<sup>12</sup>, covering data received between October and December 2021. At this stage, data at a county level is not available to access – the expectation is that this will be made available as part of the full report due in Summer 2022.

In the interim, the data in the Participation Survey provides a national understanding of audiences for, and participation in, the arts and culture, and is a good proxy to understand changes in behaviour based on pre and post pandemic activity.

Within the Participation Survey, 87% of respondents engaged with the arts in person in the last 12 months, including as audiences and as participants. This

<sup>10</sup> <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/isshybridworkingheretostay/2022-05-23>

<sup>11</sup> <https://www.local.gov.uk/publications/creating-resilient-and-revitalised-high-streets-new-normal>

<sup>12</sup> <https://www.gov.uk/government/statistics/participation-survey-october-to-december-2021-report>

increases to 91% when looking at the South East as a region. This is the only question currently providing any kind of regional breakdown.

46% of respondents have participated in or attended three or more activities during that time, including attending a play, drama, musical, Pantomime, Ballet or Opera (14% of respondents) and attending a live music event (17% of respondents).

COVID-19 remains a significant barrier to engagement, with 28% of respondents giving this as a reason, although a similar level of the population are simply not interested in engaging with the arts (29%). Given the higher levels of engaged segments identified within Haywards Heath above, it is likely that this second figure is smaller locally.

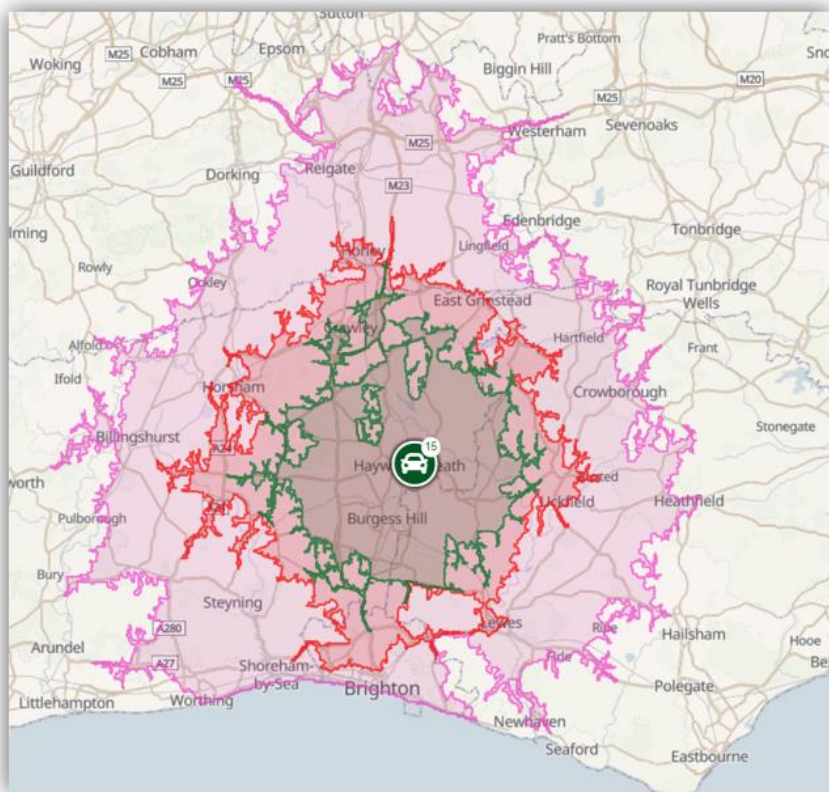
When comparing the Participation Survey to Taking Part survey data (the last round of which took place in 2019/20), there has been an increase in engagement levels, with 76% engagement pre-pandemic. However, levels of frequency have decreased (previously 60% had three or more engagements in the previous 12 months) as have overall levels of participating. This suggests that although the appetite for engagement is there, the comfort to engage has not fully returned, and it may be some time before we see engagement returning to pre-pandemic levels.

## Key takeaways

- If the Clair Hall site wants to cater to the three key audience segments in Haywards Heath, it will need to be able to facilitate a diverse programme of activity.
- The existing demographic in Haywards Heath skews towards a highly engaged population, with just over half of all residents counting as “highly engaged” compared with 20% of households nationally.
- Modelling suggests that the population of the town is aging, with a greater proportion of retirement aged residents expected by 2031 and fewer working age residents, which will have an impact on the consumption needs of residents.
- Coming out of the pandemic, local high streets are increasing in importance as more people take a working from home or hybrid approach to work, therefore providing resilient high streets with strong offers beyond retail can increase footfall and the desirability of Haywards Heath.
- Initial research carried out on behalf of DCMS suggests that there is still an appetite for engagement with culture and the arts post-pandemic, however whilst there has been an increase in overall engagement, there has been a decrease in frequency of engagement.

## 4. The cultural landscape of Haywards Heath

To get an understanding of the cultural landscape of Haywards Heath and its surrounding areas we have undertaken a mapping of community and cultural indicators within 15-, 20- and 30-minute drive-times of Clair Hall (see appendix B for indicators definitions). In the time available in Phase A of the project, this work has allowed us to establish an overview of the current local community and cultural offer.



The indicators selected for the mapping of Haywards Heath and the surrounding areas are derived from a wider list of indicators based on the UNESCO definition of culture that we use extensively in our work mapping the cultural vitality of areas. 24 key indicators were selected that included formal cultural venues, production and production spaces, flexible spaces and arts education amongst others. For each indicator we assessed the time patrons are willing to travel to access them and only mapped each indicator within its relevant drive time<sup>13</sup> e.g., we know that community centres have a hyper-local audience that will typically travel no more than 15 minutes to access them, therefore we only mapped community centres within this 15-minute drive time.

	15-minute drive	16-20-minute drive	21-30-minute drive
<b>NPOs</b>	0	0	2
<b>Museums</b>	2	5	9
<b>Public art galleries</b>	1	0	0
<b>Multi arts centres</b>	0	0	3
<b>Libraries</b>	2	4	18
<b>Theatres</b>	2	2	7
<b>Live music venues</b>	1	0	1
<b>Cinemas</b>	1	2	7
<b>Creative &amp; coworking workspaces</b>	2	0	
<b>Performing arts/dance rehearsal space</b>	0	0	
<b>Community centres</b>	15		
<b>Crafts</b>	28		
<b>Film, TV, Video</b>	12	5	
<b>Esports</b>	0	0	
<b>Music, performing and visual arts</b>	6	4	
<b>Universities</b>	0	0	2
<b>Non-professional dance/theatre schools</b>	16		
<b>Non-professional music schools</b>	13		
<b>Non-professional art schools</b>	3		
<b>Professional dance/theatre school</b>	0	0	1
<b>Professional music schools</b>	0	0	0
<b>Professional art schools</b>	0	0	0
<b>Spaces for hire</b>	26		
<b>Space for hire with a stage</b>	8	1	

<sup>13</sup> Shaded cells indicate that the indicators were not mapped for these assets.



The mapping for this project has been primarily developed through desk research. Whilst we believe it to be comprehensive, we recognise that it is not exhaustive. The indicators we map do not span the full value chain associated with culture but are chosen for their ability to indicate the general cultural vitality of an area.

When assessing potential options for the Clair Hall site the mapping exercise should be used as a reference point to consider how any proposition for the site might fit into the wider cultural landscape of the area and how it might compliment what is already in place.

Our mapping indicates that Haywards Heath is fairly typical of a town of its size. For a small number of the indicators, it is well provided for. For example, there are a good numbers of theatres, cinemas, libraries and community centres within a 30 minute drive time but in general it has no stand out cultural assets such as Arts Council Portfolio Organisations, multi-arts organisations or organisations derived from any unique town heritage. With this in mind, we might consider the cultural eco-system of Haywards Heath underdeveloped.

When considering the future development of the town's cultural ecosystem, it is unlikely that we need build the numbers of theatres, cinemas, libraries or community centres unless they are to provide a distinctly different provision / value proposition from others in the town and surrounding areas. *In Phase B we will explore this further through soft market testing.*

In terms of identifying 'gaps' in the market there are plenty, but consideration needs to be given to what the actual demand or need might be for any specific option proposed for the Clair Hall site that might be seen to fill these gaps. As options for the site are developed, the feasibility / viability will need to be established - a key part of this assessment will be a detailed need and demand analysis for each option.

In the consultation work completed by Engage Communicate Facilitate (ECF),

the top five suggested future uses were community centre / resource, cinema, theatre, café / meeting space and arts centre. Looking at these five areas through our mapping we can see that:

- There are a large concentration of theatres within a 30-minute drive of Clair Hall, consisting of: The Hub Theatre, housed in Haywards Heath college; Burgess Hill Theatre, located within a 15-minute drive of Clair Hall; and 9 theatres within a 30-minute drive of Clair Hall including Chequer Mead Theatre, The Capitol, and Brighton Open Air Theatre. We would consider Haywards Heath and its surrounding areas to be well served by theatres and given its geographical location, this provision is increased by the offerings of London and Brighton. Our mapping has also highlighted a healthy concentration of performing arts schools within a 20-minute drive of Clair Hall, including BPM Dance Academy and Drusilla Duffill Theatre School.
- Cinemas are the second largest asset groups identified in our drive time radius mapping. At present, there are 10 cinemas within a 30-minute drive of Haywards Heath. These include independent and commercial cinemas, 3 of which are within a 20-minute drive of Clair Hall. According to the BFI<sup>14</sup>, the screen density for the South East of England is 5.2, implying that in line with its population size, we would expect Mid Sussex to house 2 cinemas. As we have identified more than this, we can therefore consider that Mid Sussex is well served by the cinema industry.
- The largest gap identified in our mapping are multi-arts centres. Whilst the immediate local area is poorly served by multi-arts centres, we found that within a 30-minute drive time radius, there was a number of multi-arts centres serving a much denser population in, and on the outskirts of Brighton. Due to the breadth of programming seen in multi-arts centres, we feel this may be an opportunity for Clair Hall to produce an offering that serves its local community.
- There are a strong cluster of community centres within a 15-minute drive of Clair Hall. These spaces double up as venues for hire, providing a range of

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<sup>14</sup> BFI, Comscore, Cinema Theatre Association, Dodona Research, BARB, Cinema Advertising Association (CAA)



facilities from meeting rooms to stages. They are indicative of the informal network of culture venues in the area and facilitate a network for local people and organisations. In our experience, the range of spaces / facilities available within Haywards Heath is typical for a town of its size, but the facilities do not offer the range of co-located spaces offered by Clair Hall.

Another future use of Clair Hall which was highlighted in the ECF report were meeting and events space, and a café. As we feel these are ancillary services which support a cultural offer and will inevitably be a part of the renewed space, we have not included these within our mapping.

*In Phase B we will explore some specific questions pertaining to each of these asset types:*

- *What audiences do the existing theatres/cinemas/multi-arts centres in the area cater to and are there any gaps in the market that a provision on the Clair Hall site might meet?*
- *Are there any viable operating models for theatres/cinemas/multi-arts centres provision on the Clair Hall site within the agreed financial parameters<sup>15</sup>?*
- *Could theatres/cinemas/multi-arts centres provision on this site support / strengthen arts education provision (informal and formal in the area)?*
- *How might any option for this site meet the needs of the local community groups including flexible spaces/facilities for hire?*

## 4.1 Creative Industries in Haywards Heath

Whilst our mapping covers some indicators pertaining to the creative industries, we read with interest Dr Josh Siepel's work for the Policy and Evidence Centre at the University of Sussex which has mapped clusters of Cultural and Creative

Industries across the UK. This work suggests that creative industries micro clusters – small clusters of creative companies working in geographically concentrated areas – may be key to the bounceback from the pandemic. Within the report, Siepel specifically identifies a micro cluster of businesses in Haywards Heath<sup>16</sup>. The report doesn't provide any specifics on the nature of the businesses within this cluster or what number they classify as 'micro'.

*In Phase B we will develop our understanding of this identified micro cluster to understand if there might be an opportunity to work with the businesses to help them develop/generate impact for the local area, using the Clair Hall site as a catalyst.*

## 4.2 Future provision

There are two notable proposed cultural developments in their early stages within a 15-minute drive of Haywards Heath. Both based within Burgess Hill, these projects include the regeneration of the town centre and the proposal of a community arts venue (The Beehive).

The revitalisation of the town centre led by NewRiver REIT will see the refurbishment of The Martlets shopping centre, which is planned to include some leisure facilities. Planning permission was granted in 2021 but the challenging retail environment nationally and the impact of Coronavirus mean there is no clear timeline available at this stage.

Elsewhere in the town, a Burgess Hill Town Council-led initiative hoping to increase cultural activity has been proposed. The Beehive, a multi-use community centre and arts venue, is anticipated to include a theatre, flexible meeting rooms and a café. However, the project was suspended in June 2022 because of a significant increase in estimated construction costs.

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<sup>15</sup> See section 5 for more detail on the agreed financial parameters

<sup>16</sup> Figure 2.2, Creative Industries Radar: Mapping the UK's Creative Clusters and Microclusters <https://cdn2.assets-servd.host/creative-pec/production/assets/publications/PEC-Creative-Radar-report-November-2020.pdf>

## Key takeaways

- The cultural provision in Haywards Heath is fairly typical of a town of its size.
- With no significant cultural assets (e.g., Arts Council NPOs) there is room to develop the cultural eco-system of Haywards Heath.
- The indicators of demand (public sentiment) outlined in the ECF work is at times at odds with the provision in place – this needs further exploration.
- A cluster of CCI businesses have been identified in Haywards Heath as part of a national study – this data needs to be explored further to understand its significance.
- Plans for the activation of the Clair Hall site need to be mindful of the progress of other planned cultural developments in the district.

## 5. Options development

### 5.1 The success criteria

An important element of the first phase of this project has been the establishment of a defined set of success criteria that articulate MSDC's aspirations for the development and activation of the Clair Hall site and the context in which it will be delivered. This is a key element of the project as it will go on to be used in Phase B as the framework for the development of potential models for the site and in the longer term will be used by the council to assess potential options for the site.

During this process we have worked closely with the Clair Hall Members Steering Group to gain a thorough understanding of the council's desired outcomes for the site, from which we have drawn out some key priority areas under the following headings:

**Profile and Ambition** – the level of ambition for the site and what sort of profile MSDC expect to see for the site.

**Financial** – the financial parameters within which options for the site will be developed.

**Strategic Impact** – the social, economic and/or cultural impact that options for this site will deliver, and how the activation of the site will align with existing strategies.

These have been cross-referenced against existing MSDC strategic priorities (see appendix C) and further informed by input from the council's management team.

It is vital that at this early stage there is consensus within the council around the desired outcomes so that there is a clear and defined direction for the activation of the site. This, however, needs to be balanced with keeping the process open enough that the widest range of models and options are considered and that opportunities are not overlooked. For this reason, the criteria have also not been

weighted in order of priority at this stage, however this weighting will be required when the council is assessing the feasibility of specific options. The criteria outlined here provide a solid platform for the next phase of the project, but may evolve as it develops, to ensure any future usage reflects the district's changing needs.

Each criterion is categorised as either essential (E) or desirable (D):

**Essential** – these are locked in criteria that any option for Clair Hall must deliver

**Desirable** – these are criteria that any option for Clair Hall would look to deliver but it is recognised that it is unlikely that any one option will deliver all of these

#### 5.1.1 Profile and Ambition

- The use of the site must fill identified gap(s) in local cultural / leisure provision (E)
- The site must be flexible, multi-functional and future proof (E)
- The site must offer a memorable and positive first impression (E)
- The site and any buildings on it will celebrate the local beauty of the surrounding area by opening up and promoting connectivity with Clair Park (E)
- The site will provide a cultural / leisure offer for the whole of the Haywards Heath community (existing and future) (E)
- The site will offer a destination with a reach across the district (D)
- The site will raise the profile of culture and act as a catalyst for culture/creativity in the town (D)

#### 5.1.2 Financial Criteria

- The site will be leased on a long-term lease basis (E)
- A financial return will be realised from the use of the site (D)
- No capital investment will be required for the site (D)

### 5.1.3 Strategic Impact Criteria

The activation of the site will align with key MSDC strategies, and deliver the following:

- The use of the site must enhance town centre living, providing activities and delivering impact during daytime and evening (E)
- The site must take measures to reduce carbon emissions, including improvements in energy efficiency and in the design and construction of buildings. This includes new buildings and the conversions of existing buildings (E)
- The use of the site will act as an exemplar for striking successful partnerships across the public, private and third sectors (D)
- The use of the site will contribute to the economic development of Haywards Heath through the creation of employment opportunities (D)
- The use of this site will capitalise on the development locally of world-class digital infrastructure (D)

### 5.1.4 General ‘non-negotiables’

Alongside the above criteria, MSDC have also set out the financial context for the project that is currently non-negotiable. In summary:

- Consideration will not be given to selling the site
- MSDC are not able to offer any form of subsidy to any organisation or operation to be based on the site
- The Council recognises that combining a variety of uses on the site may offer the best opportunity to make any culture/leisure offer viable and impactful for residents. This would have to take place within the parameters of the Council's planning and economic development policies and strategies.

## 5.2 Potential models for the site

Taking into consideration the success criteria and agreed financial parameters, there are three possible options that might be explored for the site.

### — Refurbishment option

- Model 1: Refurbishment of the existing buildings on the site by a party who can raise the operational expenditure to maintain and run Clair Hall's existing buildings on a leasehold basis

### — Development option – cultural facilities only

- Model 2: Development of the site by a party who can raise the capital to level and build a cultural/community facility on a leasehold basis

### — Development option – cultural facilities plus other uses

- Model 3: Development of the site by a party who can develop the site with a cultural/community facility and other uses on a leasehold basis

These models have been successfully deployed in other towns and cities across the UK but need to be carefully considered within the context of Haywards Heath. We recognise that there are a number of factors that make the site attractive, but these have to be balanced with detracting factors such as the lack of subsidy/capital funding available, the current funding climate, a lack of focussed cultural strategy for the town/district and a lack of vibrant cultural ecosystem for an offer to sit within.

*In Phase B of the project, we will explore these options/models further through soft market testing to establish:*

- *How the various models might meet local needs/demand*
- *The likelihood of each of the models to deliver MSDC's success criteria*
- *Levels of interest and what the drivers for investment might be*

*Our research will combine a series of consultations with sector specialists and market leaders and case studies to illustrate/ support the models where appropriate proxies can be found*

## 6. Phase B: Outline approach

Phase A has allowed us to work with Members to establish a clear set of success criteria and parameters within which we can explore options for Clair Hall. We have also spoken with Officers across the Council to better understand the strategic and local context that Clair Hall sits in.

With this understanding we have outlined potential delivery models for the site and undertaken some initial research to understand what proposition they might attract and how activating the site with each model might deliver against the success criteria.

We do not anticipate that any of the models will deliver against all of the criteria, but the success criteria provide a framework that will allow the options to be assessed against each other.

In Phase B we will undertake further research to establish:

- How the various models might meet local needs/demand
- The likelihood of each of the models to deliver MSDC's success criteria
- Levels of interest and what the drivers for investment might be

Our research will combine a series of consultations with sector specialists and market leaders and case studies to illustrate/ support the models where appropriate proxies can be found

In Figure 2 (overleaf) we outline sector specialists and market leaders that we will seek to engage with as part of our first round of consultation and will use these consultations and further research to identify any further consultees as appropriate.

At this point in the project, it is difficult to predict how much interest in the site there will be – offered under any of the options/models. We think it likely that the challenging funding climate and lack of established cultural ecosystem in Hayward's Heath (amongst other factors) will potentially reduce the number of interested parties. We anticipate that MSDC will need work to keep the process

as open as possible to allow opportunities to present themselves and for the council to take advantage of these.

Our final report will present our findings and provide recommendations on:

- Updates to the success criteria based on our findings in this phase
- Which of the models MSDC might look to take forward for the site
- How MSDC might move forward to realise the recommended models e.g., the process of getting the opportunity to market

**Figure 2 Phase B: First round consultees**

Consultees	Rationale
Commercial cinema operator	To understand the operator's approach to the building and operation of independent cinemas and what they (and organisations similar to them) see as the drivers for investment.
Arts Council England, South East regional office	To identify any organisations locally who might be interested in the proposition / be in a position to realise such a venture and what the drivers for investment might be.
Commercial attractions / leisure operator	To understand the current outlook of commercial operators in the sector and if any of the models present an attractive opportunity to them or similar operators.
Local higher education institutions	To understand if they may see any opportunities on the site for cultural/community facilities.
Leaders in the local digital economy	To understand the opportunities for collaboration between the creative and digital sectors and to see if they see any opportunities in the site for tech/digital led cultural/community facilities.
Brighton & Hove, Arts & Culture Service	To understand if they run a 'culture at risk register' (or similar) that identifies cultural/community organisations in need of premises locally who might be interested in the proposition / be in a position to realise such a venture.
Independent investors in the Creative Economy	To understand the current outlook of independent investors in the UK's 'creative economy', and what the drivers for investment into a site such as Clair Hall might be.
Multi-arts centre specialist	To understand approaches to the building and operation of multi-arts centres and what they see as the drivers for investment.
West Sussex County Council and key service providers	To understand if there might be opportunities to consider library / key service provision as part of a mixed-use development on the site and if the individual services / County Council might be in a position to realise such a venture.
Independent theatre specialist	To understand if any of the models might present an attractive opportunity to a theatre operator (commercial or non-for-profit) and what the drivers for investment might be.
Creative workspace / studio provider	To understand the provider's approach to the building and operation of artists' studios and what they (and organisations similar to them) see as the drivers for investment.
Commercial developers	To understand if any of the models might present an attractive opportunity for them and what the drivers for investment might be.
Authors of Creative Industries Radar: Mapping the UK's Creative Clusters and Micro clusters	To understand the micro cluster of CCIs identified in Hayward's Heath.

# Appendix



# Appendix A: Audience Spectrum Segments

Audience Spectrum segments the whole UK population by their attitudes towards culture, and by what they like to see and do. It profiles the population at household and post-code levels, and explores their behaviours, attitudes and preferences for arts, culture and heritage organisations.

Audience Spectrum is a behavioural, geo-locatable, segmentation model developed for the cultural sector. Further information about the data sources used to inform Audience Spectrum can be found here: <https://community.theaudienceagency.org/docs?topic=267>

There are ten different Audience Spectrum segments, and they are ranked 1 to 10, representing most engaged (1) with culture to least engaged with culture (10).

## 1. Metroculturals

An active, educated, prosperous, ethnically diverse and liberal-minded group who choose the urban lifestyle specifically for the broad range of cultural opportunities it offers. Time is more important than money for this busy, cultured and creative group, who are happy to pay for premium experiences and support the arts as a worthy cause. Though primarily Performing Arts leaning, this group is also drawn to Museums, Heritage sites and Festivals and is the most open to new and innovative creative work. This group is overwhelmingly located in prosperous city centres, especially London, and engages with the concept of 'community' on a societal, rather than local, level.

## 2. Commuterland Culturebuffs

A largely middle-aged group of older families and empty nesters, with considerable disposable income and time to indulge in a wide range of interests and leisure activities. This group attends regularly, just as much to socialise as for the art, and is happy to pay for ancillary amenities and donate generously to preserve convenient culture. Traditional leaning but

open-minded, members of this group tend to be interested in and frequenters of a variety of artforms, as well as being keen am-dram enthusiasts. These leafy greenbelt suburbanites are found primarily in the south, in easy commuting distance of urban centres, and in areas with a strong sense of community involvement.

## 3. Experience Seekers

A younger-leaning, lively and active cohort of busy, mixed prosperity professionals, from a wide range of backgrounds and at a variety of different life stages. Considering culture to be at the heart of their social life motivates seeking out frequent new experiences with friends and looking for discounts to support diverse interests. Open to pretty much anything, but with a clear leaning towards the contemporary and culturally specific, this group particularly enjoys immersive and participatory arts. This predominantly urban group lives within easy reach of a wide range of cultural provision, but is also prepared to travel to experience new activities and places.

## 4. Dormitory Dependables

This large group includes families of all ages, with typical educational backgrounds, solid careers and the means to enjoy their time as they please, both at home and abroad. Trips to arts and culture tend to mark special occasions with friends and family, so the wrap-around offer is extremely important and group-based discounts appeal. Hardcore history and heritage buffs who otherwise lean towards museums, galleries and the mainstream performing arts, with a particular enthusiasm for live popular music. A suburban cohort concentrated heavily around the South East and North West, with average levels of arts and cultural provision locally, but a willingness to travel for treats.

## 5. Trips and Treats

A largely family dominated group with children ranging from school-age to young adult, living comfortable but modest lifestyles, close to relatives and where they grew up. Arts and culture engagement is largely determined by children's interests and educational requirements, value for money, and the need to guarantee good family fun. Drawn to heritage, museums and mainstream arts, they are also among the most attracted to participatory

activities, which parents see as important and educational. Found in semi-detached and suburban terraces across the UK, they are likely to be well embedded in the local fabric and willing to travel into town centres by car for events.

#### 6. Home and Heritage

An older group of retired or semi-retired home owners, living on modest pensions and spending their time enjoying reading, gardening, period dramas and Countryfile. Recognising the value of arts and culture - and particularly heritage - in their lives, they are willing to spend leisurely days engaging, as long as comfort and access needs are met. Traditional in their tastes, they enjoy daytime exploration of historical sites, as well as theatre matinees and classical music recitals, and participate in local crafts and 'Am Dram'. Largely found in rural areas and small towns, far from urban bustle, this group is limited in its ability to travel independently, so local provision and organised daytrips are key.

#### 7. Up Our Street

Soon-to-be, or already, retirees from skilled professional, White working class backgrounds, who enjoy sofa time, social clubs and fishing trips on modest pensions. Arts and culture, for their own sake, are not a priority for this lower income group, so the ancillary experience, like food, drink and retail, is key to unlocking the 'treat' factor. These infrequent attenders are drawn to mainstream and inexpensive offers like museums, heritage, music and carnivals, and enjoy home-based craft activities. Found primarily around the edges of industrial Northern and Midlands towns and small cities, this group is locally minded, and both unable and disinclined to travel far.

#### 8. Facebook Families / Frontier Families<sup>17</sup>

Households with young children, living on low incomes or unemployment, in council rented housing and spending most of their free time enjoying at home entertainment. While they don't consider culture very important or themselves 'arty', they are family motivated and the right offer can appeal on those grounds, especially if free. Trending towards mainstream family-

friendly artforms, like cinema and pantomime, this group also engages in culturally specific projects that reflect their own communities. Located in and around urban areas, predominantly in the North and Midland regions, public transport can be a hinderance, despite being quite close to many arts offers.

#### 9. Kaleidoscope Creativity

The most ethnically diverse segment, this mixed aged group tends to be council housed, with low education, employment, and income restricting leisure opportunities. Characterised by their lack of cultural engagement, despite some considering themselves 'arty', they are easily put off by price, so are more likely to attend free events. Though attendance is generally low, culturally specific festivals, street arts and live music, beyond the western mainstream and outside of traditional venues, are relatively popular. These inner-city dwellers are close to a lot of cultural provision, but income and transport limitations inhibit access, so community-led, local co-creation is very important.

#### 10. Heydays / Supported Communities

A health-impaired and socially inactive group living on very modest incomes, often in state-provided accommodation, with indoor leisure habits like puzzles and crosswords. Accessibility issues often deter this group from attending arts, but when opportunities are thoughtfully provisioned, the chance to engage and socialise is welcome. Tastes tend towards the mainstream and participation opportunities are largely initiative-led, with content relating to localness and nostalgia being best received. This group lives mainly in outer city and suburban areas with limited access to arts and culture, so taking opportunities to them is important for engagement.

Find out more about Audience Spectrum here:

<https://www.theaudienceagency.org/audience-finder-data-tools/audience-spectrum>

<sup>17</sup> Facebook Families and Heydays were rebranded as Frontier Families and Supported Communities in April 2022, however the information about the segments remains the same

## Appendix B: Mapping indicators and definitions

Indicators	
Formal Cultural Venues	Definitions
Museums	This includes museums of all kinds (art museums, natural history, historical museums, other specialised museums etc.). This excludes open-air museums, activities of commercial art galleries, restoration of works of art and museum collection objects, activities of libraries and archives. Art museums differ from art galleries in that they usually have permanent collections or endowments, and do not try to sell the artworks on a regular basis.
Public art galleries	Non-profit and public funded art galleries.
Multi arts centres	Multi-use space providing three or more of the following facilities: performing art space, visual art gallery space, museum facilities, cinema space, education space and/or rehearsal studios, archives and/or library facilities.
Libraries	Publicly funded libraries open to the public. This excludes libraries affiliated with higher education institutions.
Theatres	Spaces used for theatrical performances (including musical theatre) at least twice a month. Multi arts venue can be included if they programme theatre performances at least twice a month. This excludes purpose-built theatre venues now used for another art form (e.g. live music and/or film screenings).
Live music venues	Any spaces where live music is programmed at least once a week. Bars and restaurants can be included as long as this is specifically live music. Some nightclubs might fit the category unless they only programme djs, which is not live music.
Cinemas	Number of spaces primarily dedicated to feature and documentary film projection.
<b>Cultural vitality</b>	
Creative workspaces	Premises providing for a minimum of at least five artists or makers' studios or supporting five artists/makers (even if other workspace or living provision is included in the building). This excludes studio workspace affiliated with an education institution and only studios accessible on the open market. This only includes creative production space and excludes office and retail space.
Performing arts/dance rehearsal space	Spaces self-identified as spaces for music-making, theatre and dance rehearsal, and publicly bookable in some way. Spaces within drama/dance/music schools are not included unless they are publicly bookable spaces.
Community and cultural diversity	
Community centres	Venues run and/or used by one or several community associations. This excludes community rooms (usually located on local estates) used by communities for their social activities.
<b>Creative industries (companies/employment)</b>	
Crafts	Any organisation with any of the following trades working on site; smiths and forge workers; weavers and knitters; upholsterers; bookbinders and print finishers; glass and ceramics makers, decorators and finishers; furniture makers, other craft woodworkers; musical instrument makers and tuners; goldsmiths, silversmiths, precious stone workers; hand craft occupations not elsewhere classified.

## Appendix B: Mapping indicators and definitions continued

Indicators	
Film, TV, video	<p>Motion picture, video and television programme activities</p> <p>Includes production of theatrical and non-theatrical motion pictures whether on film, video tape, DVD or other media, including digital distribution, for direct projection in theatres or for broadcasting on television; supporting activities such as film editing, cutting, dubbing etc.; distribution of motion pictures or other film productions (video tapes, DVDs, etc) to other industries; as well as their projection. Buying and selling of motion picture or any other film production distribution rights is also included.</p> <p>Motion picture, video and television programme production activities</p> <p>Includes production of motion pictures, videos and television programmes (television series, documentaries etc.), or television advertisements.</p> <p>Motion picture, video and television programme post-production activities</p> <p>Includes post-production activities such as editing, film/tape transfers, titling, subtitling, credits, closed captioning, computer-produced graphics, animation and special effects, developing and processing motion picture film, as well as activities of motion picture film laboratory</p>
Esports	<p>Electronic sport gaming activities</p> <p>Includes Esports production activities</p> <p>Includes spaces for esports gaming to take place</p>
Music, performing and visual arts	Any organisation whose primary purpose is the production of music, performing and visual arts.
Education	
Universities	An institute of higher education that falls under the group of 'recognised bodies', all of which have been granted degree-awarding powers by either a Royal Charter, Act of Parliament or the Privy Council.
Non-professional dance/theatre schools	Anywhere providing dance/theatre classes at an amateur level for any age group
Non-professional music schools	Anywhere providing music classes at an amateur level for any age group
Non-professional arts schools	Anywhere providing arts classes at an amateur level for any age group
Professional dance/theatre schools	Anywhere providing dance/theatre classes at a professional level for 18+
Professional music schools	Anywhere providing music classes at a professional level for 18+
Professional arts schools	Anywhere providing arts classes at a professional level for 18+
Clair Hall Project Specific	
Spaces for hire	The hire of function rooms or event space
Spaces for hire with stages	The hire of function rooms or event space which include a stage
Other	
NPO	Arts Council, National Portfolio Organisation

## Appendix C: Mid Sussex District Council strategic documents

### Strategic documents or context

Sustainable Economy Strategy & Action Plan 2022 - 2025

Haywards Heath Town Centre Masterplan, Supplementary Planning Document March 2021

Neighbourhood Plan: Our Bright Future (Haywards Heath Town Council) 2016

Mid Sussex Parking Strategy 2020 - 2030

Mid Sussex Corporate Plan and Budget 2022 - 2023

Mid Sussex District Council Community Management and Asset Transfer Policy

# **BOP** Consulting

BOP Consulting is an international consultancy specialising in culture and the creative economy.

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