

Creative Impact

De La Warr Pavilion Economic Impact Evaluation



Commissioned by De La Warr Pavilion, Hastings and Bexhill Economic Alliance
in partnership with Sea Space.

Produced by sam and the University of Brighton
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de la warr
pavilion



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De La Warr Pavilion Economic Impact Evaluation – Executive Summary

In all, the economic impact of DLWP for the financial year 2006/07 has been over £16 million

The De La Warr Pavilion reopened in October 2005 following an extensive repair and refurbishment programme. The aim was to bring back the spirit for which it was originally created in 1935 for a 21st century community of visitors, audiences and artists. Under the new ownership and management of a charitable trust, its vision is to be a flagship for contemporary art, through the delivery of high quality exhibitions, performances and education. Its key brand associations are:

A modernist icon...

A focus for cultural innovation...

A catalyst for regeneration...

A resource for the community...

A cultural tourism destination...

The **De La Warr Pavilion (DLWP)** is valued in different ways by different people. This study sets out to articulate some of those values.

It:

- provides evidence of the impact DLWP has had upon the economy of Bexhill and the wider area
- demonstrates the benefits to the South East's cultural economy and ecology
- demonstrates how DLWP is contributing to the delivery of the agenda of the main regional agencies and stakeholders
- demonstrates how DLWP is a catalyst for culture-led regeneration
- provides evidence of increased participation in cultural activity and opportunities for professional development; training and skills development for a range of people

Volume and Value

In all, the economic impact of DLWP for the financial year 2006/07 has been over £16 million

Visitors to DLWP bring benefits to the local economy

DLWP demonstrates its effectiveness as a cultural destination through the volume of visitors it has attracted in its opening phase. Many people are motivated to travel some distance specifically to see DLWP and its cultural programme. During the course of their visit, they spend in local shops and on accommodation, food and drink, all of which helps to grow the local economy.

DLWP and its visitors have added over £11.7 million to the region's economy which, in turn, has generated another **£4.5 million** through further economic activity.

From April 2006 to March 2007, DLWP received 576,000 **visits**.
72.7% of all visits were by people outside of Rother district
- more than **418,000 visits**.

These visitors **spent over £4 million in Rother** and their spending on hospitality and retail is bringing new business into the local economy.

As a cultural business, **DLWP spent over £1.6 million** between April 2006 and March 2007, **£267,000 of this was retained within Rother's economy**.

DLWP has attracted new capital and revenue investment into the South East

- **£9 million has been invested in DLWP**. This significant new investment was drawn from Arts Council England and Heritage Lottery Fund, English Heritage, SEEDA and many others. This funding has enabled one the region's significantly important architectural icons to be preserved.
- **£600,000 of new revenue investment per annum has come from government and other charitable sources, reducing the cost to the local taxpayer by 50%**.
- Equally, the investment in DLWP adds to the region's cultural infrastructure bringing a new and high profile cultural focus for the South East.

Further Impact

HOSPITALITY

The South East's hospitality sector received over **£4.6 million** from visitors living outside Rother. Of this, **£2.9 million** was retained within Rother district.

RETAIL

The South East retail sector received more than **£2 million** from DLWP visitors. Over **£1.27 million** remained within Rother local economy.

ACCOMMODATION

Hotels, B&Bs, self-catering accommodation and campsites benefited from nearly **£1.5 million**, **£900,000** of which was spent within Rother. That equates to almost 42,600 bed nights in Rother. In addition, **68,000 overnight stays** were with friends and relatives.

ATTRACTIONS

South East cultural attractions benefited from DLWP's visitors by **£1.4 million**. It is estimated that **attractions in Rother received £874,000** from DLWP visitors who are not residents of Rother.

LOCAL EMPLOYMENT

DLWP provides **regular employment for 77 staff** making it an **important employer for Bexhill and the Rother economy**. Further employment is created for **artists and professionals** through its artistic programme.

TRANSPORT

Nearly **£1.2 million** was spent on **transport, parking and fuel** by DLWP visitors.

Press and Media - Putting Bexhill on the Map

DLWP has generated media coverage with a value of over £3.5 million

DLWP is attracting and sustaining a consistently high press and media profile. Extensive national and regional coverage is raising awareness of Bexhill as a cultural destination motivating visitors to travel to the area.

DLWP has generated media coverage with a value of over £2.2 million with over 350 pieces of coverage since October 2005. Press and media coverage in the pre-opening has an **additional value of £1.35 million.**

Creating positive profile: national press and media attention has celebrated the restoration of an important modernist building in Bexhill and the wider region. This coverage ranges across high-profile national press to specialist trade publications and travel features

DLWP's role in securing this volume of media attention is resulting in an expanded visitor economy for the area, positioning Bexhill as a new cultural destination and enhancing the South East's tourism offer and economy

Cultural Impacts - Creating Cultural Value

Investment in DLWP through capital and revenue funding and the expertise represented through the organisation's staff and associate creatives is contributing to culture through the following strands:

ORIGINATING NEW CULTURAL CONTENT AND PRODUCT

Eight exhibitions created and curated, including Variety, Motion Path and Voodoo Macbeth; **two further exhibitions** hosted with nationally important visual arts organisations; **innovative live art and performance based events** such as the commissioning of Jour de Fete and Sea Tongue.

INCREASING ACCESS TO CULTURE FOR AUDIENCES

27% of attendances are by Rother residents. **106 ticketed events, 20 free events; 60 talks and lectures, 13 conferences, 30 corporate events.** DLWP is available for use by a diverse range of **local and community organisations.**

ADDING TO THE CULTURAL ECOLOGY

The creation of **new spaces** and **new cultural product**; the forging of **new partnerships** and **relationships**; enabling **participation** by a broad range of people; giving a **focus for civic pride** in Bexhill.

ADDING TO THE REGION'S TOURISM OFFER AS A CULTURAL DESTINATION

150,000 visits to artistic events at the DLWP. **Extensive press and media coverage** is building DLWP and Rother's profile.

SUPPORTING THE CREATIVE ECONOMY

60 artists have shown work, including artists of international status; **emergent artists** are benefiting from development programmes; **8 new publications** created; **12 new partnerships** with major national and international cultural innovators; **133 designers and makers** have benefited from training and seminars; **198 artists** have benefited from professional development programmes.

SUPPORTING LEARNING AND SKILLS DEVELOPMENT

2,305 attenders at family events; **164 attendances by young people** in skills building events; **2,277 participations by young people** at other events; **30 new partnerships** including in arts and health; projects involving **123 teachers and 634 students.** **DLWP education and outreach has attracted 9,188 participations.**

Future Challenges

- The refurbishment of DLWP has enabled it to position itself as a world class centre of cultural excellence but financial constraints on its artistic programme could prevent it reaching its full potential.
- The immediate external environment alongside DLWP - Bexhill seafront and the town centre - are not yet at the same stage of regeneration. Bexhill's hospitality and retail sector require substantial regeneration and investment to ensure that the process of making Bexhill a viable cultural tourism destination and a vibrant place to live and work can be carried forward.
- The regeneration of the surrounding area will benefit DLWP stakeholders. As a centrepiece of the Bexhill townscape there is now an opportunity to implement further contemporary urban design schemes to fully integrate DLWP into the immediate surrounding seafront area.
- DLWP is now in a position to be a 'driver' in the development of a creative economy in Bexhill, Rother and Hastings. This will need vision, commitment and strategic focus from decision makers in the region. This is a time of change and regeneration with real opportunities for local people.
- A coordinated approach to a policy and planning architecture which manages the cultural sector for maximum synergy between the subsidised and commercial sectors and the arts, heritage, tourism and place-making actions needs to be put in place – in order to join up the various portfolios held across a range of sectors and agencies.
- Whilst this report demonstrates the impact of national media upon the economic regeneration of the area, it is vital that local media sources recognise the important contribution made by DLWP and the implications and opportunities it represents for Bexhill. Local media should seek to support economic development in the area which they directly cover.

1. INTRODUCTION

In October 2005, after extensive refurbishment costing over **£9 million**, the De La Warr Pavilion (DLWP) reopened to the public. This has been viewed as an **important milestone in the regeneration of Bexhill** and as a catalyst that will lead to the **building of a new visitor economy** and the **development of a thriving creative industries sector**. The *Investment Opportunities in Bexhill-on-Sea* brochure, produced by Rother District Council, describes the re-opening of the DLWP as having the potential 'to support the development of local cultural and creative businesses'. Expectation is high amongst key stakeholders and supporters as many recognise the DLWP to be the lead cultural, economic and community driver within the town.

The purpose of this study is to measure the impact of the DLWP upon the local economy since it re-opened in late 2005. The study was commissioned by the DWLP and Hastings and Bexhill Economic Alliance administered through Sea Space with the express purpose of placing a monetary value upon the activity of the DLWP, with a particular focus upon the economic impact it has upon the local economy of Bexhill and also Rother District, more generally. In addition to its economic value, this study investigates the cultural value of the DLWP.

This study:

- provides an evidence base demonstrating the impact of the DLWP upon Bexhill, Rother and the wider region
- outlines the benefits to the local economy
- illustrates the positioning of DLWP within current thinking, policies and plans for regeneration and development in Bexhill and the surrounding area

The study also draws upon an extensive range of current reports and plans in order to contextualise DLWP's impact across other business sectors in the local economy.

Within a broader context, the DLWP is important as...

- a **cultural focus**; an outstanding, iconic, modernist building of national importance
- a **focus for contemporary visual arts** and a cultural destination of regional, national and international status
- a **landmark** and an **important focus for the local community**; a place for recreation, entertainment and stimulation. Indeed, from the initial declaration of its vision, by Earl De La Warr, "...a modernist building of world renown which will become the crucible for creating a new model of culture provision in an English seaside town which is going to lead to the growth, the prosperity and greater culture of our town." to the pride and loyalty shown toward it today by local residents.

- an **economically active hub** for the area; it has potential to act as a magnet and destination for high-spending cultural visitors and play a key role in the process of regeneration for the Hastings and Rother area.

DLWP positions itself as “*a modernist icon for contemporary art*” and aims to deliver “*a world class programme with an emphasis on the visual arts creating unique quality product, being accessible to all and acting as a catalyst for social and economic change within the town through creating new aspirations and a new set of positive values*”¹

To deliver this vision, the DLWP has levered substantial new public sector investment from Rother District Council, Arts Council England, South East and East Sussex County Council together with new investment into the area levered from a range of trusts, foundations, and sponsors including Esmée Fairbairn Foundation, The Henry Moore Foundation, The Mercer’s Company, The Bearing Foundation, The Calouste Gulbenkian Foundation, ARHB, British Council, Blueprint Magazine and Iitala.

‘The De La Warr Pavilion, arguably the most important modernist public building in Britain and one of the most active creative centres in the South... [is] once again recognisable as an architectural icon... The building... introduces sharp, perfectly proportioned purity to the English seaside...’ – Blueprint Magazine²

¹ ADSE diagnostic discussion, 2006

² Blueprint Magazine, August 2006, ‘Are You Sitting Iconically?’

The authors of this study

This report was produced in collaboration between **Sussex Arts Marketing (sam)** and the **University of Brighton**.

The consultancy team was led by **Shaun Romain** and **Pam Jarvis** from **sam** and **Professor Andrew Church** and **Dr Jim McLoughlin** from the University of Brighton.

Shaun Romain and **Pam Jarvis** are Directors at **sam** and specialize in the analysis and capacity-building of the cultural sector. Researchers **James Bluring** and **Suzy Horne** undertook the quantitative and sector-specific aspects of the study. **sam** is also undertaking cultural mapping and the development of a cultural policy route plan for Hastings and Bexhill, commissioned by the Hastings and Bexhill Cultural Sector Group.

Andrew Church is Professor of Human Geography at the University of Brighton and Co-Director of the recently established Hastings and Bexhill Coastal Regeneration Research Centre based at University Centre Hastings.

Jim McLoughlin is head of full-time MBA and head of the CUBIST (Cultural Business – Impact Strategy and Technology) Research Group at the University of Brighton's Business School. He currently heads EPOCH's socio-economic impact research which has developed models for conceptualising impact and tested methods for measuring impact.

This team of consultants comprises substantial expertise in the measurement of the impact of cultural facilities, in economic mapping of the cultural sector and in evaluation and strategic analysis.

Placing the DLWP in context

Like many coastal towns in the South, Bexhill-on-Sea has struggled to fashion its own recognisable sense of 'place' to replace its former role as a successful holiday resort. Compared to its heyday, most of the hotels and resort businesses have gone, with no significant alternatives to replace them. According to Colliers CRE annual report on retail growth in Sussex, between May 2005 and May 2006, Brighton and Chichester became the most expensive places to start a business with annual rents in £ft² reaching £190 and £175 respectively; by comparison Bexhill had the lowest £ft² rate, at only £40³. This lack of commercial progress is contributing to the perception of Bexhill as a retirement destination. Over 26% of Bexhill's population is retired, nearly double the national average. This, in turn, means that employment is 8% lower than the national average, falling as low as 44% in some wards.⁴

Bexhill has nearly three times the national average of people over 75, with about 21% of the population in that category. The average age in Bexhill is 49, compared to a national average of 38. Rother District, as a whole, has the second highest proportion of its population over 65 in the country, and the largest proportion of its population over 85 of any local authority in the UK.⁵

Low employment, few opportunities for well paid work and a high proportion of retired residents has significantly contributed to Bexhill's average wage being about 20% lower than East Sussex as a whole and the national average wage⁶. Low pay and few opportunities for young people starting their working lives has contributed to Bexhill's disproportionate number of retired people. Young people have left the district to find a successful career and better paid work, attracted to towns with buoyant economies and good communication links to London and other parts of the South East.

The lack of efficient transport links remain a major disadvantage for Bexhill. Access is poor by road, rail and air, with slow north-south and east-west rail and road links, including access to the Channel Tunnel. Places such as Brighton (an important market for the DLWP), although only 32 miles away, takes over an hour to reach by car, though recent improvements to the rail link has reduced this to approximately 50 minutes when travelling on certain trains. There are no direct rail services to London (a major employment centre for Sussex residents), the nearest direct route is via Battle. Road links are equally poor. The A259 is slow and congested. The combination of slow roads and rail services means that Bexhill is over 60 minutes drive and 90

³ Business Edge, April 2007

⁴ Office National Statistics (ONS)

⁵ Ibid.

⁶ Data source: www.eastsussexinfigures.org.uk

minutes train journey from all major ferry ports and airports. Newhaven Harbour is relatively close with limited crossings to Dieppe in Northern France.⁷

For a town of its size, it is immediately noticeable that Bexhill lacks many of the expected high street retailers. In part, this is due to it being located between two regional shopping centres, Hastings and Eastbourne. But another major contributing factor is that many of the existing town centre commercial properties are not large or modern enough to attract the high street multiples. The lack of major high street chains gives Bexhill a bygone appearance. Interestingly, unlike many redeveloped town centres, Bexhill has retained an alternative retail offer, based around small, privately owned businesses. This, however, has probably resulted in a quiet high street and the concentration of shoppers in Hastings and Eastbourne, where they can find popular, contemporary chains.

The Bexhill Town Centre Strategy, published in 2001, highlights that, in recent years, the levels of private investment in the town have been low resulting in decaying buildings. The retail mix has also been changing away from comparison shopping to convenience shopping. The Strategy clearly warns that, unless action is taken, the town centre is likely to continue into a spiral of decline.

With a high proportion of independent retailers and few multiples, it is clear that Bexhill's retail offer is not aimed at those with high disposable income. This is an essential element, when developing the cultural offer for the DLWP; the town's retail and food and drink provision is an important factor when creating a destination and repeat business. The Bexhill Town Centre Strategy describes the supply of cafés and restaurants as very poor with few facilities. This is reflected in the town not having a single pub, restaurant or hotel listed in any of the major independent guides for quality. In short, the existing retail offer is not designed to attract or match the expectations of the wealthier residents of Bexhill, the surrounding areas or cultural tourists. Consequently, these groups spend their money elsewhere.

Visitor accommodation consists of only 180 hotel rooms throughout Bexhill. The biggest, Cooden Beach Hotel, currently with 33 rooms (will rise to 41 in September following refurbishment), which is three miles from the centre. Bexhill is lacking in all visitor accommodation sectors and not at this stage able to exploit economically from much of the new tourism trade that DLWP is generating.

⁷ Notes from presentation by Locum Destination Consulting Ltd: *Summary of Bexhill's weaknesses* (date/publication unknown)

Bexhill's image is of a place that is elderly and old fashioned. This image - and the reality of the town itself - will need much imaginative regeneration in order to attract investment or reap the maximum benefit from the growing volume of culture-led tourism .

This is the environment in which DLWP operates.

The wider picture

The refurbishment of the DLWP has taken place alongside other regeneration activities in Bexhill. It is recognised that a range of projects are needed bring sustained, effective economic development and change to Bexhill.

Partners - including Rother District Council, Hastings and Bexhill Task Force, East Sussex County Council and SeaSpace - are working on a diverse range of developments.

Key initiatives include:

- Hastings to Bexhill Link Road: a planning application was submitted in May 2007 and public consultation is currently underway. This aims to improve road travel between the two towns and reduce traffic on the overstretched A259 coastal road. However, mechanisms will need to be designed to encourage visitors to stop in Bexhill when they no longer have to drive through the town.
- East Sussex County Council has applied for £28 million Government funding towards the rebuilding of Bexhill High School. Total investment will be up to £34 million and will provide improved accommodation, leading to confidence in teaching and learning at the school as well as contributing to the need to increase levels of education attainment in Bexhill.
- In north Bexhill, 1,500 new housing units are planned.
- European funding has enabled lighting schemes for the facades of the Colonnade, Bexhill Museum and Clock tower, to the exterior of the De La Warr Pavilion and also to Sackville Road and Park Avenue (implemented March 2007). This improved lighting should stimulate the evening use of the Promenade and immediate seafront area. Further lighting projects are planned.
- University Centre Hastings is a core strand of the Hastings and Bexhill Task Force's Education Strategy to provide relevant further and higher educational opportunities locally. UCH is a collaborative venture involving partnerships with the University of Brighton, Canterbury Christ Church University and the University of Greenwich. It is already offering courses in Media Studies, Broadcast Media and Creative Writing. Further development of degree level arts courses is anticipated.

The forecast is for 2,000 higher education students to study in Hastings in the next 5 – 10 years, which will impact of the life of the town. This is a valuable opportunity for DLWP build synergy with UCH as a creative partner.

- Hastings College of Arts and Technology is expanding Higher Education opportunities in Art and Design and new partnerships with The Open University and the University of Sussex are further increasing the range of programmes available to students, again providing further opportunities for the creative involvement of DLWP.

2. MEASURING VOLUME AND VALUE

A central focus of this study is to determine the economic impact of DLWP on the local economy. In order to measure this, the various income streams which contribute to the overall impact have been quantified, compiled from a range of sources. A model of how the various streams and components interact is set out on the following page.

There are five layers to the model. Each layer represents another addition (or subtraction in the case of Rother district) to DLWP's economic impact.

The **first layer** of the model is a section which details DLWP income sources, these comprise Public Grant Aid; contributions from Trusts and Foundations; Sponsorship (public and private) and Gifts (individual or corporate); Earned Income (retail and hospitality) and contributions from DLWP reserves.

The **second layer** shows the total expenditure for DLWP during 2006-07, less the contribution by Rother District Council (because their contribution is not additional to the local area, if it was not spent on DLWP it would be spent elsewhere in Rother).

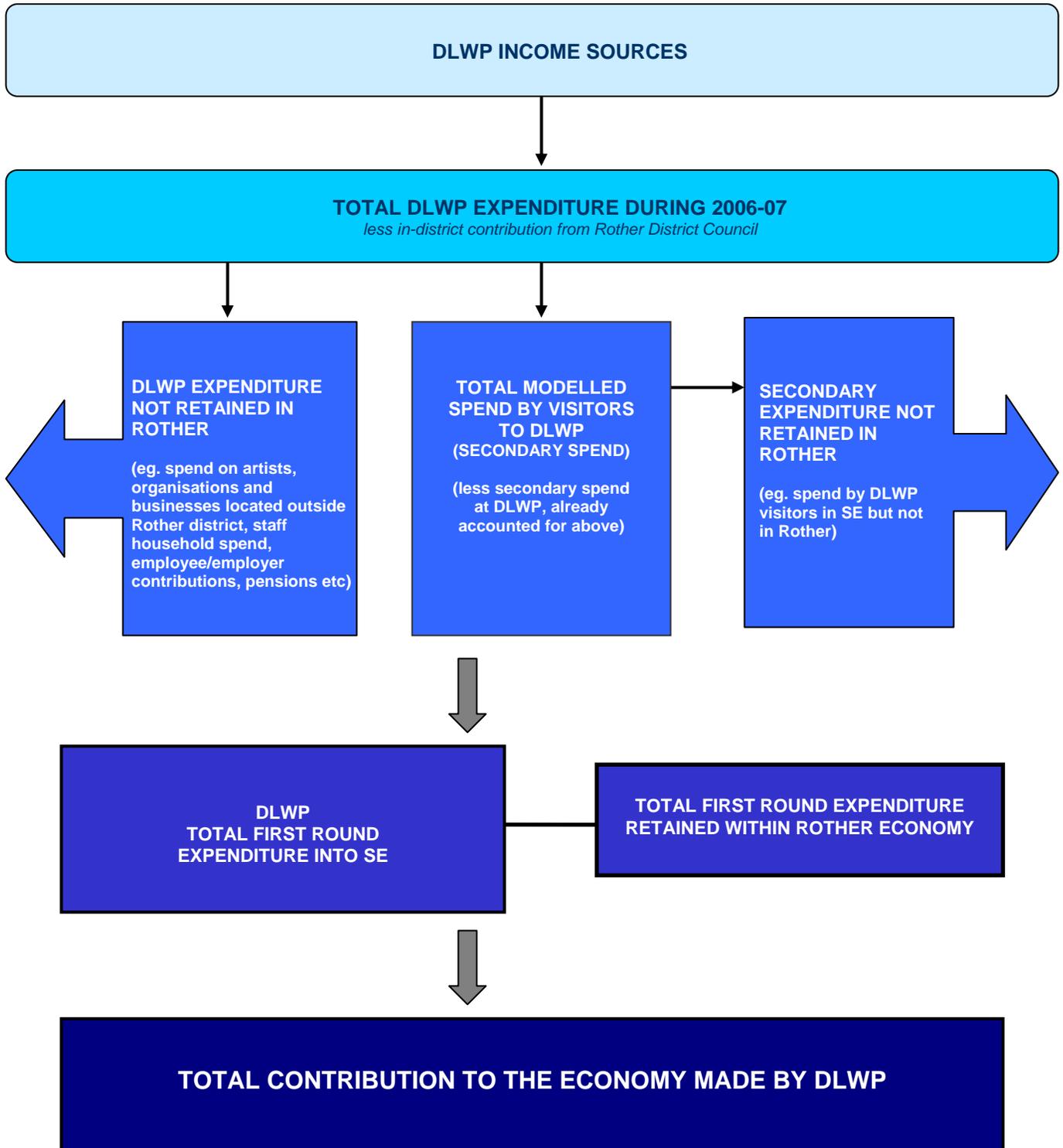
The **third layer** shows three elements:

- First: the estimated amount of DLWP 2006-07 expenditure not retained in Rother, but spent elsewhere (predominantly in the UK).
- Second: the total modelled spend by visitors to DLWP (Secondary Spend) on other activities such as shopping, accommodation, food and drink etc.
- Third: the secondary expenditure that is not retained in Rother, but spent elsewhere as part of the visit to DLWP (predominantly in the South East).

The **fourth layer** shows total first round expenditure into the UK economy (a combination of spend by DLWP and that of its visitors) and how much of this is spent directly into the Rother local economy.

The **final layer** shows the total contribution to the UK economy of DLWP and their visitors when the first round expenditure is multiplied by a factor of 1.38. This multiplier was devised by English Partnerships and indicates levels of further economic activity associated with the creation of local income, local supplier purchase and longer term effects.

DLWP Income and Expenditure Flows - Model



Components of the DLWP Economic Impact Model

DLWP Visitor Contributions to the Economy (Secondary Spend)

Secondary Spend by visitors to DLWP forms the greatest part of the economic impact. Secondary spend is defined as the money spent by attenders to the DLWP, in and out of the local district, as part of their visit. This might include travel, shopping, eating out and accommodation if their visit included an overnight stay. To calculate this, two surveys were undertaken.

The first consisted of 922 visitors to the DLWP (who provided information on the day of their visit). From this survey we were able to record the geographic origins of a sample of DLWP's visitors to segment the audience by location.

A subsequent detailed online survey was sent to over 3,000 individuals who had registered with DLWP for further information about forthcoming activities and events. The returns from this online survey provided data on a further 964 visitors to DLWP. In turn this generated mean data for each geographic segment derived from the following:

Respondent contact details

- Party size
- Frequency of DLWP use
- Motivation for visit
- Number of nights stayed as part of the DLWP visit
- Accommodation type as part of the overnight stay
- Location of accommodation
- Secondary spend for accommodation, food and drink, transport, shopping, admissions and other expenses
- Location of secondary spend

In the course of surveying DLWP visitors, they were asked to provide us with a detailed breakdown of what they spent in the course of their visit to DLWP.

The types of expenditure were categorised as follows:

- accommodation
- food and drink
- public transport, parking, petrol etc
- shopping
- admissions and tickets to other attractions etc

These two surveys of nearly 1,900 visitors generated the primary data for the calculation of subsequent secondary spend.

Counting visitor numbers

Prior to the process of calculating impact it was essential to start from a robust and agreed figure of visitor numbers. The DLWP uses a body counter, a standard system used by organisations such as Tate St Ives and Camden Art Centre and recommended by key agencies such as the Scottish Museums Council. The system projects an infrared beam across the doorway at the main entrance to the DLWP. The counter registers every time the beam is broken as visitors enter or leave the building hence the numbers are halved to give the total number of visits. It is acknowledged that this system is not able to identify one individual visiting the building more than once hence these figures are visits and not distinct numbers of visitors. It should be noted that the DLWP does not currently count or include visitors entering via the doors adjacent to the south staircase. Staff movements into and out of the building are included in this count to offset the unrecorded visits through the south entrance.

Between March 2006 and April 2007 the DLWP recorded 576,000 visits, giving an average of 48,000 visits each month, or more than 11,000 visits each week⁸.

Determining Who Counts

Not everyone who entered the DLWP (and therefore included in the figures) did so because they had come to visit an exhibition, event or use the café or restaurant. Some will have been those who came through the front entrance more than once during their visit, others will have come to use the toilets or shelter from the weather. Where the DLWP is not the primary motivation for an excursion to Bexhill we have discounted such visitors as their impact upon the district cannot be credited directly to the DLWP.

In addition to those who came to Bexhill for reasons other than the DLWP, we have also excluded the immediate impact of residents from Rother (as a brief indication, 41% of visitors in the survey did not come to Bexhill specifically to see the DLWP and just under 25% of visitors are Bexhill residents). These visitors to the DLWP are not generating additional expenditure within the district, as they are shopping, using the cafés and restaurants, car parks and bus services every day as part of their day-to-day lives.

Because it is impossible to know every visitors' motivation for entering the building we have estimated the audience size (impact modelling purposes) based upon the **74.4%** of non-Rother resident survey respondents who stated that they had come to Bexhill specifically to visit the DLWP. The calculation below articulates how the initial recorded 576,000 visits were reduced to express that **311,551** were having an additional economic impact upon Rother and the region.

⁸ Official DLWP visitor figures and description of the counting methodology

[Total number of visits for 2006-07 (576,000)] – [Visits from Rother residents @ 27.3% (157,248)]

=

[Number of out-of-district visits (418,752)]

[Number of out of district visits] x [74.4% who stated DLWP was their motivation to visit Bexhill]

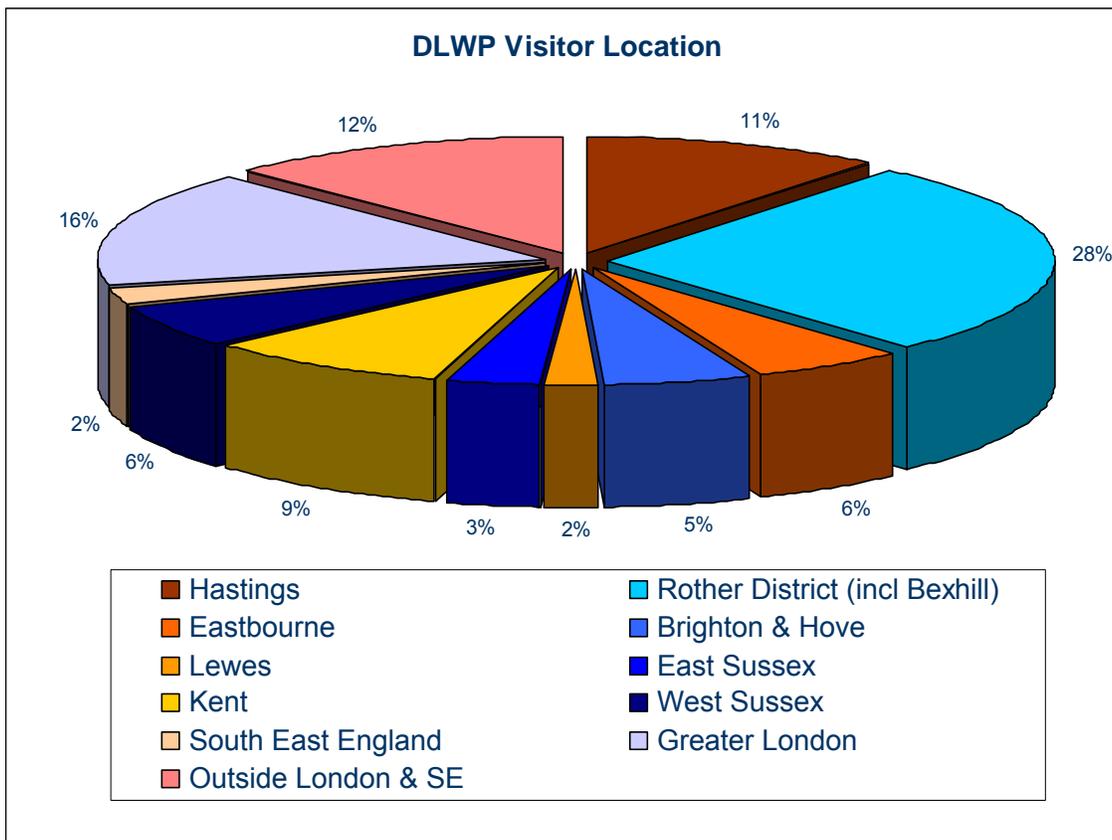
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[Number of visits generated by the DLWP impacting upon Rother District (311,551)]

Secondary Spend by DLWP Visitors

This section of the study documents the visitor base for DLWP by location and spend and uses this information to calculate first round secondary expenditure by DLWP visitors into the local economy.

DLWP Visitor Location

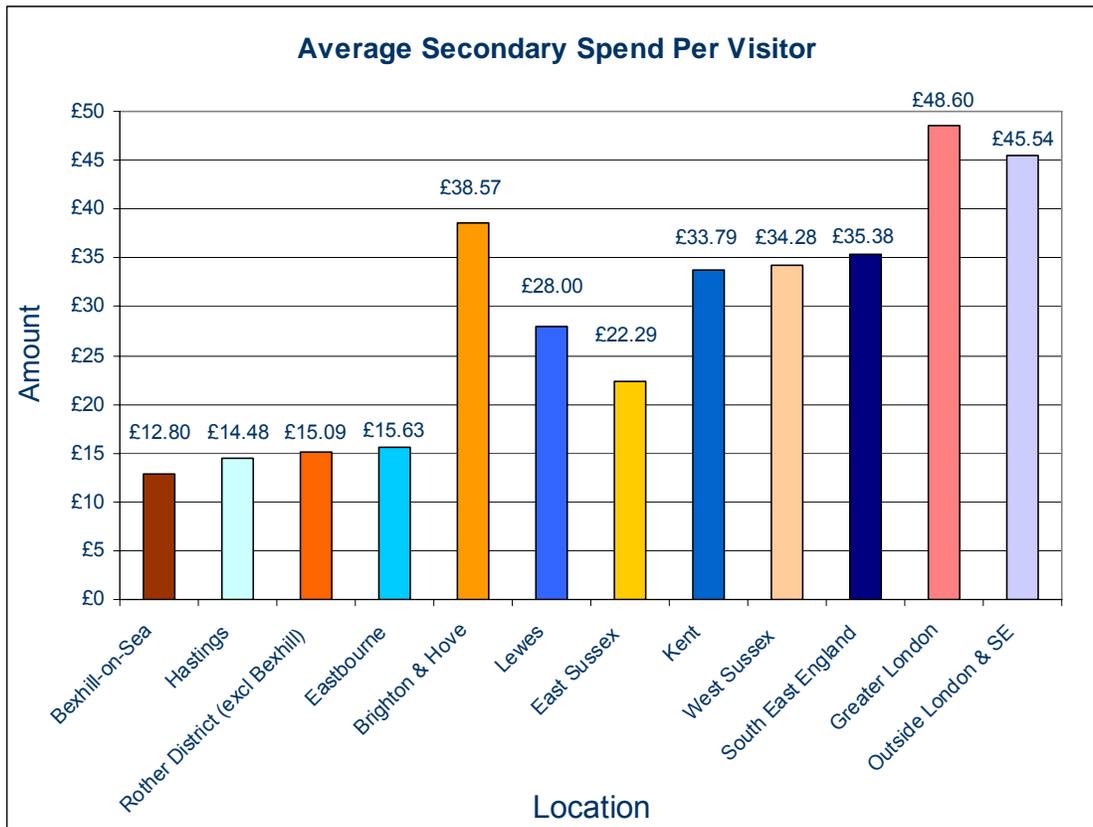


The chart above demonstrates that there is a strong local audience for the DLWP; attracting 27.3% of visitors from Rother District (rounded up to 28% on the chart).

At the same time DLWP’s role as a driver for cultural tourism is also evidenced through the attracting of a significant proportion of visitors from London and outside the South East (28.6%), a figure which is higher than any of the other major cultural attractions based within Sussex.

The TSE Bexhill Destination Benchmarking Survey 2006 indicates that about 15% of visitors to Bexhill originate from beyond London and the South East, so DLWP is performing well above this target.

DLWP Visitor Spend



The visitor spend figures follow a pattern which resonates with other studies, where the average spend increases in relation to distance travelled, or where the geographic origin for a set of visitors is known to contain large numbers of culturally-active people or clusters of cultural provision - such as Brighton.

The average secondary spend by DLWP visitors (excluding residents of Rother district) is £34.54.

This compares to an average for all English resorts of £49.87⁹ and all English destinations of £57.53¹⁰.

Independent research¹¹ undertaken for Brighton Festival in 2004 indicated that average spend for a local attender for ticketed events was £16.56 and £84.90 from visitors living over 90 minutes away. When an overnight stay was undertaken by visitors from over 90 minutes away average secondary spend rose considerably, in excess of £136.

First Round Secondary Spend Calculation

The tables below outline DLWP visitor spend as part of their visit, defined by their home location, with expenditure expressed as an average.

This means that some visitors are contributing very little, while others are spending a significant amount.

Average Secondary Spend Per Visitor						
Location	Accommodation	Food and drink	Public transport, car parking, petrol, etc.	Shopping	Admission tickets	Average Spend per Visitor
Bexhill-on-Sea	£0.00	£5.87	£0.94	£3.11	£2.88	£12.80
Hastings	£0.00	£6.77	£1.71	£2.29	£3.71	£14.48
Rother District (excl Bexhill)	£0.00	£6.58	£0.47	£4.08	£3.96	£15.09
Eastbourne	£0.00	£7.60	£1.19	£3.85	£2.98	£15.63
Brighton & Hove	£0.00	£16.19	£3.81	£16.43	£2.14	£38.57
Lewes	£0.00	£13.26	£3.95	£2.37	£8.42	£28.00
East Sussex	£0.00	£11.12	£0.90	£2.14	£8.12	£22.29
Kent	£4.69	£13.70	£3.86	£7.28	£4.26	£33.79
West Sussex	£0.00	£14.83	£2.76	£9.17	£7.52	£34.28
South East England	£6.37	£10.80	£8.60	£7.36	£2.25	£35.38
Greater London	£8.95	£21.20	£5.38	£8.16	£4.90	£48.60
Outside London & SE	£13.58	£18.75	£4.37	£6.74	£2.11	£45.54

When the average spend is multiplied by the percentage breakdown for each geographic segment the secondary spend amounts to **£10,763,635**.

⁹ Bexhill Destination Benchmarking Survey, TSE, 2006.

¹⁰ Bexhill Destination Benchmarking Survey, TSE, 2006.

¹¹ Brighton Festival 2004 – *Everyone Benefits*, sam, 2004.

DLWP Visitor Location by Secondary Spend				
	Percentage	Visits @ 311,551	Average Spend	Total
Hastings	15.1%	47,044	£14.48	£681,200.03
Eastbourne	7.5%	23,366	£15.63	£365,215.66
Brighton & Hove	7.3%	22,743	£38.57	£877,206.11
Lewes	2.9%	9,035	£28.00	£252,979.41
East Sussex	4.5%	14,020	£22.29	£312,501.23
Kent	12.2%	38,009	£33.79	£1,284,331.61
West Sussex	8.1%	25,236	£34.28	£865,077.43
South East England	3.2%	9,970	£35.38	£352,725.58
Greater London	22.1%	68,853	£48.60	£3,346,244.67
Outside London & SE	17.1%	53,275	£45.54	£2,426,153.56
Visits	100.0%	311,551		£10,763,635.30

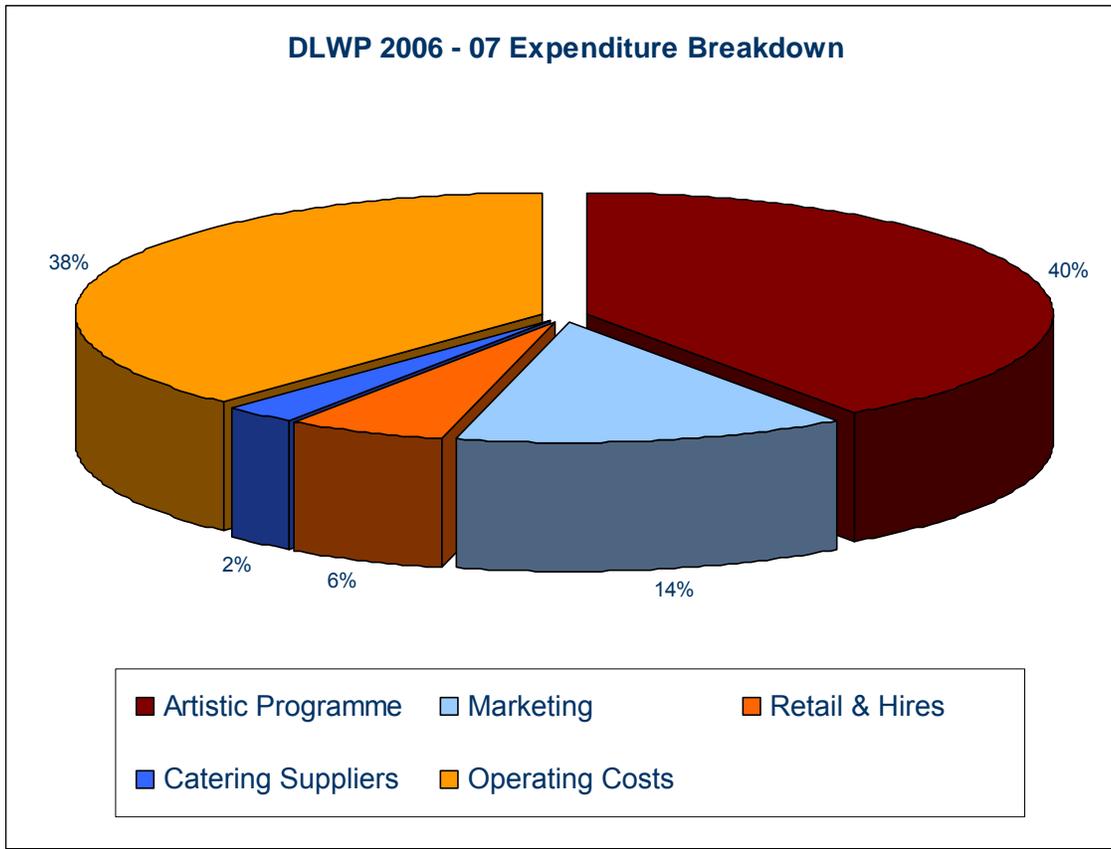
DLWP contribution through spend in the economy: primary spend

Over and above the amount contributed to the economy by visitors to DLWP, the organisation itself is impacting on the local and regional economy through its business activities.

To assess the impact of the DLWP on the local economy, and on that of the South East, we have analysed DLWP company accounts for the year ending March 2007. To ensure the estimates of local expenditure are as accurate as possible, payments in the management accounts were broken down into those made inside and outside Rother District. This is to differentiate between payments made to companies and individuals based locally and those outside the area. There are a number of main inputs and outputs, which have been set out below.

DLWP expenditure into the economy

DLWP's primary expenditure directly into the national economy includes items such as purchases of services from local businesses, buildings and ground maintenance, cleaning, wages, accommodation and hospitality. In addition to in-district spend (Rother) there also exists expenditure to suppliers of goods, staff wages and businesses located outside the district.



The table above shows the expenditure percentage breakdown for DLWP during the 2006 - 07 financial year.

DLWP expenditure from April 2006 to March 2007 was **£1,605,000**

- **£646,000** was spent on the artistic programme
- **£217,000** on Marketing
- **£89,000** on Retail and Hires
- **£40,000** on Catering suppliers
- **£613,000** on Operating costs (including core administrative and building staff)

DLWP Spend on Goods and Services

Our estimates, based upon supplier and expenditure accounts relating to onsite operations, suggest that the DLWP purchased services and supplies to the value of **£962,600** (59.9% of 2006-07 expenditure).

Of this figure:

- just under **£52,000** (5.4%) was spent in Bexhill
- **£69,800** (7.3%) was spent within Rother District (including Bexhill)
- **£370,800** was spent in Sussex which is the major part of DLWP supplier spend
- **£559,700** (58.2%) was spent within the South East region

Major recipient locations are shown in the table below.

DLWP Supplier Spend		
	Supplier location breakdown	Total geographic spend
Bexhill	5.4%	£51,700
Rother District	1.9%	£18,100
Hastings	3.3%	£31,500
Sussex	38.5%	£370,800
South East	9.1%	£87,600
London	27.0%	£260,000
UK	14.6%	£140,100
Overseas	0.3%	£2,800
Total	100.0%	£962,600

Expenditure by DLWP includes:

- accommodation for artists and performers
- cleaning, site maintenance and services
- communications and IT
- catering supplies

Spend by DLWP Staff within the Local Economy

This section demonstrates how much of the DLWP staff salaries are retained within the local economy. All wages and other income to individuals who live within Rother were assumed to be spent within the district (subject to certain assumptions – see below).

Our analysis indicates that an estimated £321,000 of net DLWP staff salaries and wages were potentially available to be spent within Rother District.

In calculating the net amount available to be spent in the local economy, the following assumptions have been made...

- Gross payments have been converted to net
- Only those directly employed staff living within the district are assumed to spend all of their incomes in the district, although it is recognised that a proportion of their salaries will be spent out of district
- Those staff who live outside the district have been excluded from our calculations, although it is recognised that they spend a proportion of their salaries within the district
- Approximately **25%** of all salaries for permanent staff are paid to a small number of senior staff who live outside the district

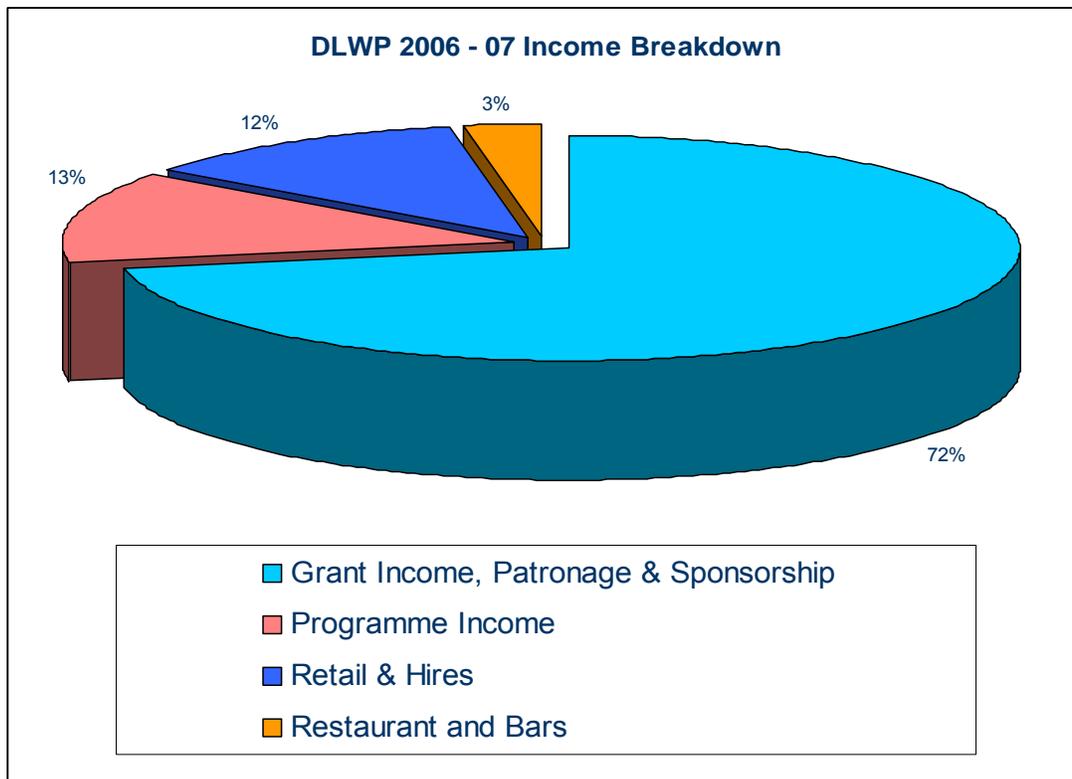
To estimate the amount actually spent in the local economy it is necessary to take into account that 25% of all potential expenditure goes to national imports and expenditure taxes. In addition to these

sources of expenditure leakage from the district it can be assumed that a proportion of consumer expenditure is absorbed by surrounding areas. Consumer spending patterns and the current structure of the local economy would lead us to believe that a minimum of **£128,000 leaks out of the district**. This means that an estimated total of **£193,000 is actually being spent by DLWP staff in the district** as a result of the direct presence of the DLWP.

DLWP Income

Main categories of income are:

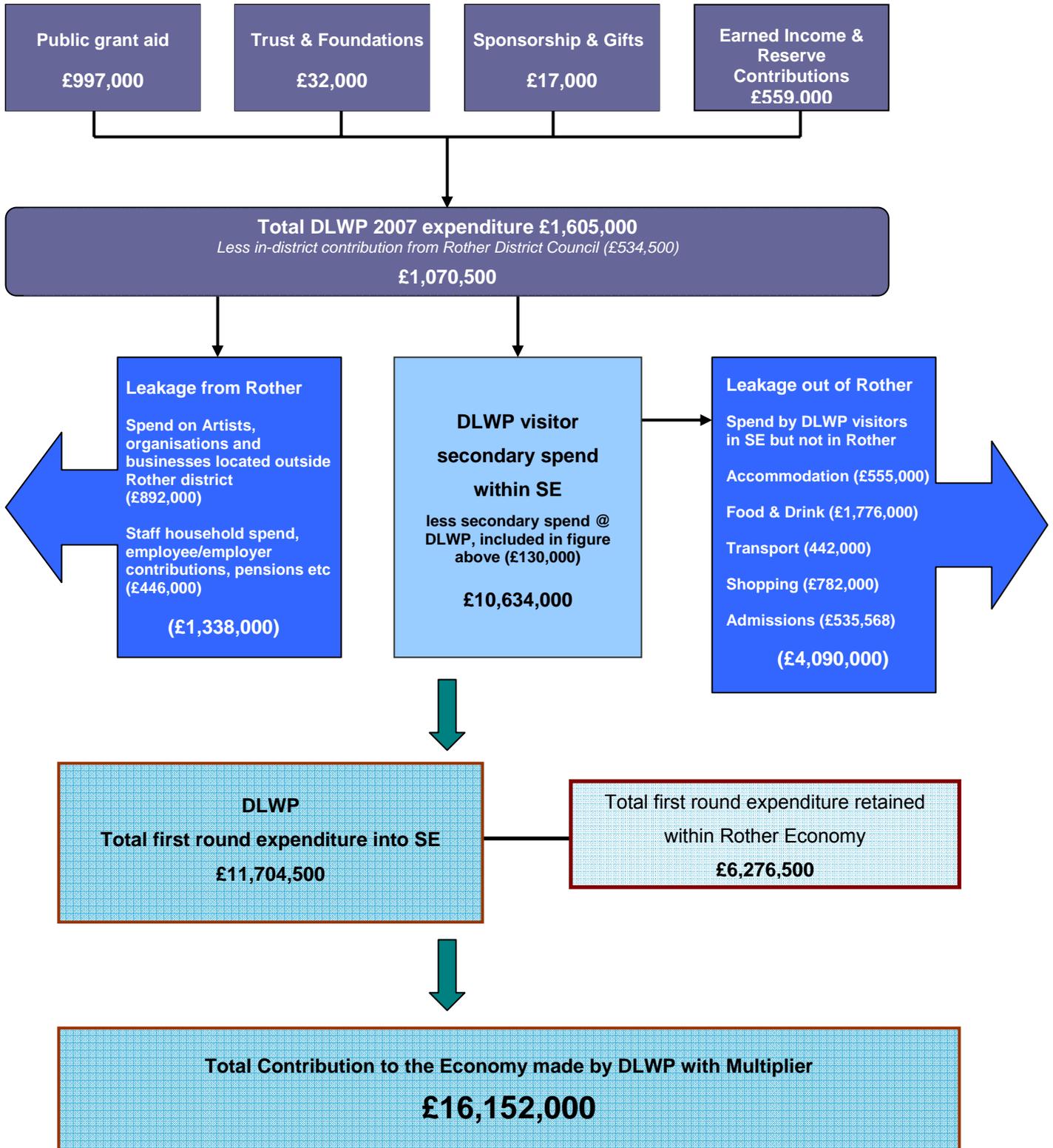
- public grant aid
- contributions from trusts and foundations
- sponsorship and gifts
- earned income



The table above shows the income percentage breakdown for DLWP during the 2006-07 financial year. DLWP income from April 2006 to March 2007 was **£1,449,000**.

- **£1,047,000** of income was derived from Grants, Patronage and Sponsorship (**Rother District Council** (£534,500), **Arts Council England, South East** (£375,000))
- **£187,000** from Programme Income
- **£175,000** from Retail and Venue Hires
- **£40,000** from Restaurant and Bar transactions

DLWP Income and Expenditure Flows

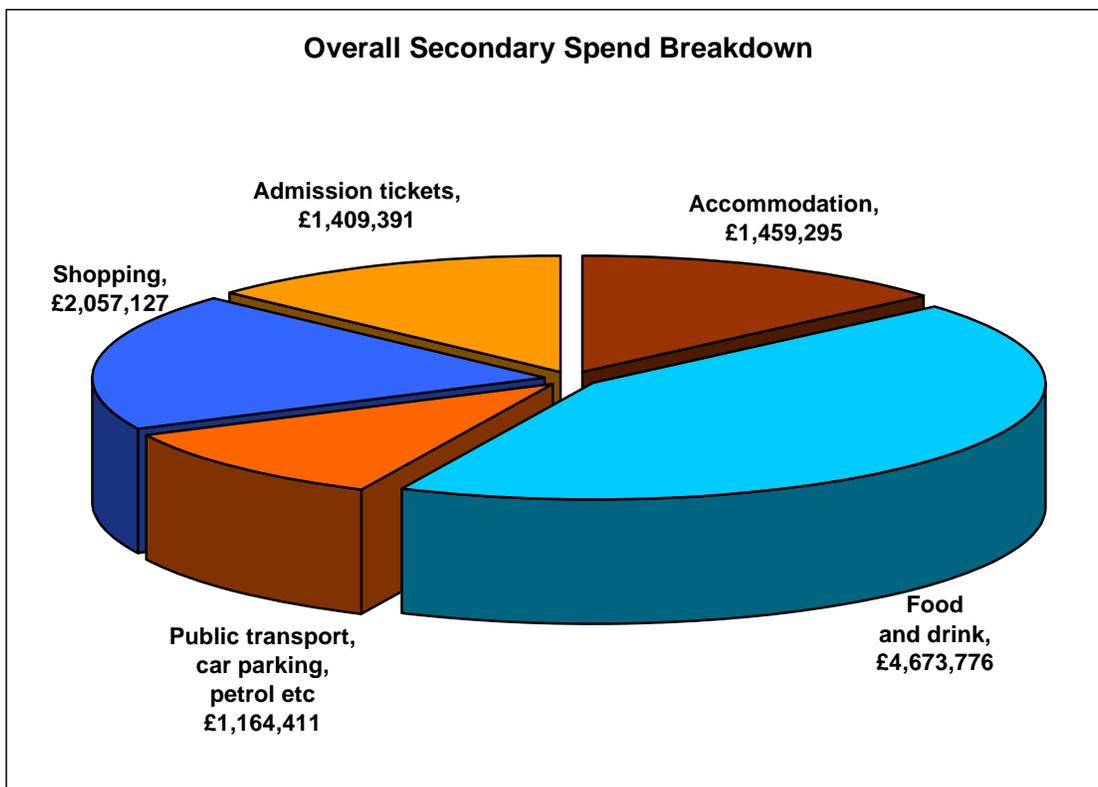


3. FURTHER DIMENSIONS OF THE IMPACT OF DLWP

Secondary Spend Impact

DLWP visitors added over £10.6 million directly to the UK economy.
Over £4 million of this visitor secondary spend was retained within the Rother economy.
Their total impact was £14.67 million.

The pie chart below shows the modelled values for five sectors within which DLWP visitors spent their money. These equivalent impact values are calculated according to the economic modelling detailed earlier in the report and reflect the likely equivalent spend of DLWP visitors within each sector.



This gives an indication of the overall spend within the economy that the DLWP is instrumental in securing by attracting visitors from outside the area. As this shows, the contribution to the food and drink sector is worth over £4.6m, £2.05m to the retail sector and nearly £1.46m to the accommodation sector. As we will see later, the expenditure generated for the tourism, heritage and arts sectors represented by admission tickets is an important contributor when looking at the local cultural ecology.

Of the £10,634,000 secondary spend by DLWP visitors £6,544,000 is retained within Rother.

Retail and Commerce

- **DLWP visitors spent over £2,000,000 on shopping within the region's economy between April 2006 and March 2007.**
- **£1,275,000 of this is retained in Rother district.**
- **Visitors from Brighton and Hove spent the highest amount on shopping at an average of £16.43 per person, but overall spend is very low when compared to country wide averages.**

During the closure period for the DLWP (2003 – 2005) IDBR¹² data suggests that there has been a slight decline in retail units in Bexhill¹³ with little overall variation in the total number of registered businesses between 2003 and 2006.

According to SIC2003 (Standard Industrial Classification) codes starting '52' which cover retail trade (except for motor vehicles), there was an increase in retail units in the wards which constitute Bexhill between 2003 and 2004, with a gradual decline during 2005 and 2006.

The data indicates only minor fluctuations in the volume of most types of shops. For example, there has been very little change since 2003 in the number of greengrocers, butchers, bakers, chemists, off-licences and other such 'convenience' shops. However, there is a slight increase in the volume of charity shops in Bexhill since 2005 and this is supported by anecdotal evidence of researchers who have a good knowledge of the town.

Whilst it appears that these low-end, subsidised units may be on the increase, it is also now apparent that there are starting to appear a number of 'boutique style' shops within the centre of Bexhill. Businesses such as *Destination*, *White Wave Crafts* and *Curves Gym* on Sackville Road and *Chameleon* and *Gecko Street Surfer* in Regency Arcade on Devonshire Road indicate that the retail provision in Bexhill is starting to cater for different tastes and budgets. Other lifestyle businesses evident in the Bexhill retail sector can be seen with the arrival of shops selling alternative clothing, such as *Imajem Art / The Funky Frog* (Goth culture) and *Timewarp* (new age).

¹² The IDBR is a list of UK businesses maintained by National Statistics and combines the former Central Statistical Office VAT-based business register and the former Employment Department statistics system. It is used for selecting samples for surveys of businesses, to produce analyses of business activity and to produce lists of businesses. It covers all parts of the economy, but misses some very small businesses (self employed and those without employees and low turnover) and some non-profit making organisations. There are around 4.4m businesses in the UK of which 2.1m are on the IDBR. The IDBR provides nearly 99% coverage of economic activity.

¹³ Although it is difficult to know exact numbers due to the way IDBR figures are rounded according to data protection legislation

DLWP average visitor expenditure on shopping in Bexhill and Rother is only £4.09, less than half that of all English resorts (£8.74) and less than a third for all English destinations (£12.42).

In 2002, Rother District Council was successful in its bid to English Heritage to establish a Heritage Economic Regeneration Scheme (HERS) for the enhancement of the commercial areas of Bexhill Town Centre Conservation Area. This grant-aided 28 shops, leveraging in £259,000 of additional funding from the private sector into Bexhill, and helping bring ten previously vacant shop units back into use.

In addition, substantial improvements to the quality of the public realm in Devonshire Square and Devonshire Road have been carried out. Although this is clearly not directly attributable to the activity of DLWP, it does indicate that potential investors and funders recognise the need for inward investment in the retail sector of Bexhill and that this can be successfully achieved through support of the town's heritage status. In this way, Bexhill's retail sector has undoubtedly benefited from leveraging DLWP's iconic status and can continue to do so in the future.

However, it remains that the Bexhill retail offer still requires further investment through a structured regenerative approach if it is to curb the decline and meet the aspirations of DLWP's tourists.

Closer co-operation between DLWP, and Bexhill and Rother business communities should attract greater regeneration led investment, recognizing DLWP as a beacon for progress and a catalyst for change within the district.

There are currently 20 empty shops in the town centre and many have been empty for over a year¹⁴.

Ainsley Gill, president of the Bexhill Chamber of Commerce and Tourism, highlights that many of the chamber's members have welcomed previous town centre development plans which offered such a structured regenerative approach. Due to overwhelming local opposition, however, such plans were abandoned. Indeed, the Bexhill electorate have a strong voice and many such plans have come up against strong opposition when put to community consultation and challenges to the *status quo* can usually be expected to meet criticism.

¹⁴ www.bexhilltoday.co.uk, *Is Town in Decline ?*, [accessed 11-04-07]

Bexhill very clearly needs brave new developments which are attractive to cultural tourists with high levels of disposable income. Making it a place for visitors to spend their money and stay for the day, rather than move onto towns with a more attractive retail offer such as Hastings, Battle, Eastbourne and Lewes.

Such developments, Gill suggests, could incorporate the concentration of retail to a more defined and coherent area within Bexhill town centre and thereby better compete with the offer in Eastbourne and Hastings, which are often favoured due to the increased choice. This is something which the DLWP must ensure they participate in fully if they are to ensure they are placed at the heart of any such concentration of retail by emphasising their power to draw in many hundreds of visitors from outside the town to the Marina area and thereby creating a reciprocal situation which benefits both the DLWP and the core Bexhill retail offer.

Accommodation and Hospitality

With little data available at ward-level, IDBR data was used to give an indication of the volume of the hospitality sector in Bexhill. This gives an approximate total of 40 restaurants, cafés and takeaways across the wards that make up Bexhill.

The same source further indicates that there are up to five hotels, five camping or caravanning sites, 15 bars and pubs and up to five 'other' catering establishments. Although these figures can only ever be indicative of volume due to the IDBR rounding rules employed for data protection reasons, what is most interesting is that these figures do not vary at all between 2003 and 2006 suggesting little development of the hospitality in Bexhill sector during this period.

The table below shows how secondary spend on catering and accommodation related to the geographic origin of DLWP visitors.

Hospitality

- **DLWP visitors contributed £4.67 million to the hospitality sector**
- **... of which £2.89 million was retained within Rother district.**
- **Food and drink forms the greatest element of DLWP's visitor spend.**
- **Visitors from further away are spending more; with the average spend by London visitors being £21.20 and the local spend by Bexhill residents being just £5.87.**
- **On average that equates to £9.30 per visit being spent in Rother on hospitality.**
This exceeds the spend figure for Bexhill residents of £5.87 and the average figure of £6.67 produced as part of the Tourism South East's Bexhill Destination Benchmarking Survey 2006.
- **At this initial stage this would suggest that cultural tourists are a valuable asset to Bexhill's hospitality sector, providing a significant, higher financial contribution per visit.**

As would be expected, secondary spend increased with the distance travelled by visitors. Visitors from London were particularly notable in that they had a relatively high average spend on food and drink (£21.20) during their DLWP visit.

DLWP visitor secondary spend by town/region of origin		
Location	Accommodation	Catering
Bexhill-on-Sea	£0.00	£5.87
Hastings	£0.00	£6.77
Rother District (excl Bexhill)	£0.00	£6.58
Eastbourne	£0.00	£7.60
Brighton & Hove	£0.00	£16.19
Lewes	£0.00	£13.26
East Sussex	£0.00	£11.12
Kent	£4.69	£13.70
West Sussex	£0.00	£14.83
South East England	£6.37	£10.80
Greater London	£8.95	£21.20
Outside London & SE	£13.58	£18.75

By comparison the average London visitor hospitality spend when attending a single event at Brighton Festival 2004 was £18.94, those who stayed for a variety of events over a day spent on average £25.55. South East visitors who had to stay overnight, due to the long travel distances and late event finish times spent £43.93. Visitors from 30 minutes away spent between £12.58 and £29.14 on food and drink, depending on the number of events they attended.

At Chichester Festival Theatre (CFT) visitors from within a 45 minute drive time spent on average £10.15¹⁵ on food and drink and those who stayed overnight £51.69¹⁶.

It should be noted that both comparative examples are between 4 and 7 years old, yet all the figures are higher than the £9.30 average for current DLWP visitor hospitality spend.

¹⁵ Chichester Festival Theatre: Impact of Additional Audience Spending in the Local Economy, 2000, sam.

¹⁶ Chichester Festival Theatre: Impact of Additional Audience Spending in the Local Economy, 2000, sam.

Accommodation

- **DLWP visitors spent £1.46 million on accommodation...**
- **... of which £0.94 million was retained within Rother district.**
- **The greatest average expenditure on accommodation was from visitors who lived in Greater London and outside the South East**
- **Average spend by (all) DLWP visitors on accommodation was £4.68.** This is considerably lower than the figure produced as part of the Tourism South East's Bexhill Destination Benchmarking Survey 2006, £23.89. It indicates a probable mismatch between the accommodation offer in and around Bexhill and the expectations of cultural tourists visiting DLWP.

Bed Nights Stayed

- **Visitors to the DLWP generated a calculated 136,870 bed nights in total**
- **... of these 68,175 nights were with Friends and Relatives**

- **50.1% of bed nights were paid stays (estimated at 68,695)**
- **... on average each paid night contributed £21.24 to the economy**
- **62% of overnight stays were undertaken in Rother**

The majority of nights stayed are from those who have traveled the furthest. 47.36% of bed nights are from those living outside of the region, 30% from those living in the SE and 21.7% from Greater London.

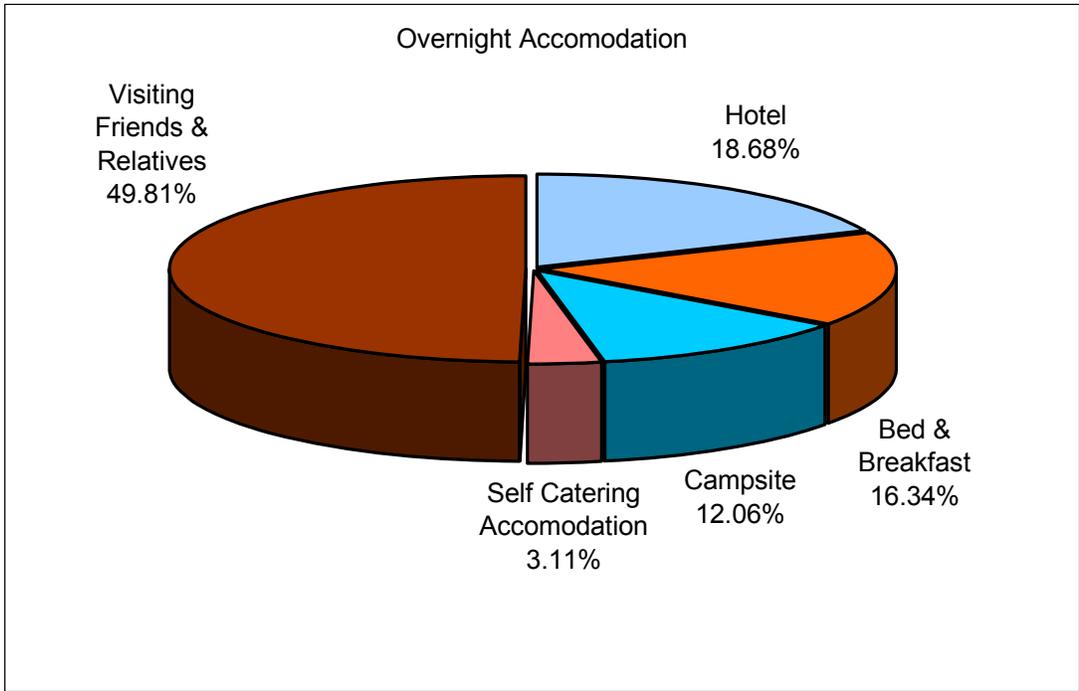
Only 49,285 of the 311,551 visits generate a stay, that's 15.8% of the total number of visits from non Rother residents to DLWP. The 49,285 individual visits create 136,870 bed nights.

The greatest number of bed nights is with VFR (Visiting Friends and Relatives) which accounts for 49.81% of all stays.

Bed Night Stays				
Audience Location	Visits @ 311,551	% Staying	Number Staying	Bed Nights
Brighton & Hove	22,743	9.52%	2,165	4,330
Kent	38,009	10.41%	3,957	9,496
South East England	9,970	30.00%	2,991	4,486
Greater London	68,853	21.70%	14,941	40,341
Outside London & SE	53,275	47.36%	25,231	78,217
			49,285	136,870

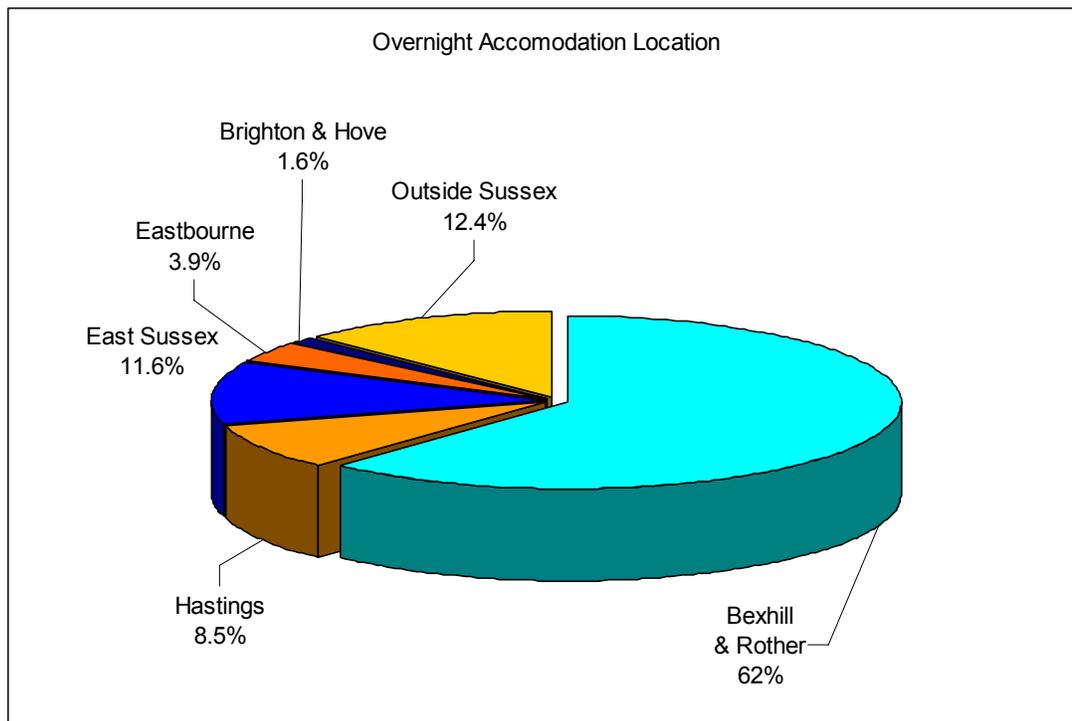
Overnight Stay Accomodation Types			
Accomodation Type	%	Total Bed Nights	Bed Nights
Hotel	18.68%	136,870	25,567
Bed & Breakfast	16.34%		22,365
Campsite	12.06%		16,507
Self Catering Accomodation	3.11%		4,257
VFR	49.81%		68,175
	100.00%		136,870

Hotels and Bed and Breakfast establishments host 47,932 bed nights, with strong support for the camping sector, but little use of Self Catering Accommodation.



The visiting friends and relatives market forms a strong component in the Sussex tourism economy. This is potentially a valuable and important source of visitors and attenders for DLWP. However, in order to maximise this potential market DLWP will need to build strong partnerships with tourism industry providers and capture the ‘hearts and minds’ of local people, to develop their perception of DLWP as an inviting and welcoming place to take visiting friends and family.

The online visitor survey showed that, for DLWP visitors using accommodation, Bexhill was the most common location accounting for just under 60% of visitors. This figure is almost three times higher than that found in the TSE Destination Benchmarking Survey¹⁷, which indicates that 24% of staying visitors to Bexhill decided to stay within the town itself.



Hastings, Eastbourne and Brighton and Hove were also popular locations for accommodation for DLWP visitors.

Average spend for overnight visitors to CFT in 2000 was £179.08. At the 2004 Brighton Festival it was £40.85 for those living over 90 minutes away. The average spend reflects the quality,

¹⁷ Bexhill Destination Benchmarking Survey, TSE, 2006.

price and availability of accommodation present in particular destinations. Visitors to DLWP are averaging £10.80 accommodation when travelling from across the region and £18.75 if they come from outside the SE. More generally visitors to Bexhill (not necessarily drawn to the town by DLWP) staying overnight spend on average £23.89¹⁸.

Accommodation average spend levels are very low, reflecting the small number of beds in the immediate area and the quality of the accommodation available.

Reflecting on this, a manager at the Cooden Beach Hotel stated that Bexhill was a 'never changing, old-standard sort of place'. His comments mirror the comments in the TSE Destination Survey: People who visit the town like the 'laid back, relaxed, old fashioned and unspoilt' atmosphere in Bexhill. Despite this, the Cooden Beach Hotel attracts a mixed range of visitors and the manager said many guests asked how to get to the DLWP and almost all visitors did eventually go there.

Park Lodge is an established bed and breakfast venue close to the DLWP that is used by many performers from the venue. It provides traditional accommodation and, although there are no figures to support the claim, it is felt the number of performers staying at Park Lodge has increased slightly since the DLWP re-opened.

However, Locum Consulting, commenting on the accommodation and catering sectors in *The Bexhill Town Centre Study*¹⁹, noted that there are 180 hotel rooms in all, dispersed amongst 18 establishments. The biggest, with 40 rooms, is the Cooden Beach Hotel, but this is some distance from the centre of Bexhill and not able to accommodate much of the trade that the now refurbished DLWP should generate. Furthermore, Bexhill does not have a single pub, restaurant or hotel listed in any of the major independent guides to quality (such as the Good Food and Pub Guides) and we note that the Bexhill Town Centre Strategy²⁰ describes the supply of cafés and restaurants as very poor with few facilities that offer the quality that day visitors would seek.

This obviously has important implications for DLWP as one of the biggest draws of visitors to Bexhill. For the DLWP to realise their full potential as an important visitor destination and regional centre for conferences, there must exist a local hospitality sector which has the capacity to cope with a large influx of visitors to Bexhill and which meets the standard of quality and care which would be expected of such visitors. Currently, although there exists 'pockets' of development in both catering and accommodation, the evidence suggests that this is not the case overall and, as such, the poorly developed infrastructure forms a significant barrier to growth for the DLWP.

¹⁸ Bexhill Destination Benchmarking Survey, TSE, 2006

¹⁹ Bexhill Town Centre Study, ABK Architects and Locum Consulting, 2004 (plans were abandoned after strong local opposition following public consultation phase)

²⁰ Bexhill Town Centre: A Framework for Regeneration and Development, Rother DC, Dec 2005

Recognising the Problems

In a report commissioned by Sea Space²¹, the following points were raised as issues which need to be overcome to access future demand and development potential for hotel accommodation:

within 1066 Country, there are 79 hotels and guesthouses, with a total of 1,145 letting bedrooms

- the supply in Bexhill is limited and continues to diminish; there has, however, been investment at the Cooden Beach Hotel, York Hotel and Park Lodge
- the corporate market is weak and there is little conference business, probably due to poor quality of the offer
- business is seasonal and leisure driven
- the sector in Bexhill is declining, with several guesthouses exiting the market

The same study also highlights that “*The De La Warr Pavilion is frustrated in its desire to develop conference business, due to the lack of a suitable hotel in Bexhill*”.

In viewing the future of the accommodation sector, the key factors identified were: slow growth in corporate demand as the area regenerates

- limited potential to attract residential conferences from London to use local country house hotels
- ‘*good prospects for growth in the leisure break business for hotels*’ across the area as the cultural and leisure offers develop and the marketing is effective. ‘*the potential to develop leisure break business in Bexhill appears to be limited however*’. The report suggests that there is potential for the development of a boutique hotel and a budget hotel/restaurant.
- there is also seen to be potential for the sector across 1066 Country to diversify into niche market hotels and to generally upgrade the offer.

The consultation with hotel developers undertaken for the Hotel Futures Study sets out the barriers to investment in the sector as a weak corporate base, poor access by road and rail; negative image of the area and ‘*little knowledge of regeneration efforts to date*’. Sites for development are available, but positive and clear planning policies and guidelines, effective marketing of development opportunities and the creation of ‘*a positive destination image*’ and building the areas leisure offer are key requirements for sector growth.

²¹ Hastings, Bexhill and 1066 Country Hotel and Guest Accommodation Futures

Tourism

- Visitors coming from outside Sussex are spending over 18 times more than local residents
- Visitors that spend the highest average amounts on tickets to other attractions are from other parts of East Sussex, with average spends in excess of £8.
- DLWP is part of a day visit for these people, including a nearby attraction.

The visitor economy in Bexhill – sector dimensions

The Bexhill Destination Benchmarking Survey 2006 identified the following dimensions of the visitor market in Bexhill...

78% of visitors come for the day

- over 48% are over 55 years of age
- 68% are within the ABC1 social group
- they are travelling from Kent (22%), East Sussex (21%) and Greater London (16%)
- 15% cited the specific motivation for their visit was DLWP, but 85% of all respondents visited the DLWP, which was viewed as the most popular place to visit
- 12% of visitors to Bexhill has seen press and media coverage about the DLWP
- whilst visitors enjoy the clean seafront, (58%) the scenic environment (46%), the ease of navigability of the town and its pleasant, well maintained open spaces, they are less impressed with its food and drink provision, attractions, shopping and nightlife.
- 79% of respondents felt events at the DLWP were 'good' or 'very good' but when asked specifically about exhibitions, 56% rated them 'good' or 'very good' with a further 23% stating exhibitions were 'poor' or 'very poor'.

The DLWP was the third most liked feature of Bexhill after the Promenade/Seafront and 'peace and quiet'. No other specific attraction or venue was mentioned amongst the 22 'likes' listed.

The DLWP visitor survey indicated that the South Downs, Pevensey Castle, Winchelsea and Charleston were other regional attractions attended by DLWP visitors.

Property

The apparent shift in tastes and budgets detected in recent developments to Bexhill's retail offer is also reflected in the recent expansion of businesses offering home improvements such as laminate flooring and a disproportionate volume of estate agents and businesses offering financial advice. The table below shows that Bexhill has over ten times the number of estate agents per head of the population compared to Hastings, and over six times the number compared to Eastbourne.

Town	Ratio of estate agencies to head of town population ²²	Ratio of financial advisory businesses to head of town population
Bexhill	1 : 745	1 : 2,078
Hastings	1 : 7,800	1 : 1,480
Eastbourne	1 : 4,600	1 : 106,500

These findings suggest that there is a very active property market in Bexhill and could indicate a significant stream of inward investment for the town. These findings are especially significant when it is taken into consideration that, in 2000, the Salehurst ward of Bexhill fell within the 10% most housing deprived wards in England. With over 11% of properties deemed either 'unfit' or 'in need of substantial repair', 47% of which are occupied by people over retirement age, the cost of bringing these up to a reasonable standard is estimated at £133m. Conversely, in the same year, St Stephen's ward (Bexhill) was the least housing deprived ward in England²³. As such, there appears to be a disparity in the housing market in Bexhill, with certain areas of the town benefiting from a combination of a high volume of housing and a high volume of agencies willing to cater for it.

So, what does this mean for the DLWP's impact in Bexhill? On the surface, one might highlight that the DLWP's emphasis on high-quality programming, showcasing fine contemporary art and architecture, along with its 'quality' brand, lends itself to promoting the development of communities with a high dispensable income and, therefore, a housing stock to suit their budgets and requirements. However, this is simply not happening in Bexhill and there is growing opposition to the idea that it should – "*in an area of high and rising prices, affordability is a major concern*"²⁴.

²² Source: primary data collected from yell.com and 2001 UK Census

²³ *Economic Regeneration Strategy 2004-2009*, Rother District Council

²⁴ Ibid

The issue here is to avoid widening the economic 'gap' between wards such as Salehurst and St Stephens.

An important role for DLWP would be to build its role in providing contemporary culture through offering opportunities to the younger sectors of Bexhill's population. DLWP is already taking an active role in developing inclusivity, access, training and skills for young people and families. This, combined with increased investment through initiatives such as HERS, is likely to encourage upward mobility across the whole of Bexhill as economic participation rises and more money stays within the town.

There is already evidence that such a change is beginning to take place in Bexhill. *De La Warr Heights* is a brand new development of two and three bedroom high-specification apartments on Sackville Road, just off the Marina and very near to the Pavilion. Although Bexhill is a very active retirement destination, the style of these new apartments is very removed from anything Bexhill has seen before and is clearly positioned towards a younger market with a relatively high disposable income. What is of note here is that this development has taken the *De La Warr brand* as a mark of quality and modernity, clearly demarcating the development as something new and desirable within a town whose housing market has, at present, a fairly static offer. Evidence, indeed, that the DLWP is not only a force for regeneration within Bexhill, but also a mark of value to the property market.

4. IMPACT OF DLWP PRESS AND MEDIA COVERAGE

DLWP generates a substantial amount of press and media editorial coverage, in a wide variety of publications. As part of this impact study, a valuation of the financial worth of the coverage was undertaken. While this does not have a direct economic impact upon the local economy, it does have a value, which can be measured in terms of equivalent spend to achieve the same level of coverage. More importantly, it is helping to position the image of Bexhill as a destination, a place to visit and a cultural focus.

The analysis was split in to two parts: pre - and post - reopening of the DLWP, with the official reopening date of **15 October 2005** being used as the cut-off point between the two analysis sections.

Pre-reopening analysis: 4th January 2003 – 14th October 2005

Total Pre-reopening number of articles:	247
Total Pre-reopening Advertising Equivalent Value²⁵:	£162,180
Total Pre-reopening Perceived Editorial Value²⁶:	£486,539

Total Pre-reopening Proof-Points Value²⁷:	£1,349,125
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Post-reopening analysis: 15th October 2005 – 1st March 2007

Total Post-reopening number of articles:	350
Total Post-reopening Advertising Equivalent Value:	£323,123
Total Post-reopening Perceived Editorial Value:	£969,372

Total Post-reopening Proof-Points Value:	£2,227,850
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In consultation with DLWP staff, a set of key messages were defined. Each piece of coverage was then assessed according to its content and scored according to the number of key messages it contained. This score was then used as part of the media value calculations in order to take account of the qualitative impact of the journalism of each piece.

Key messages:

- **The DLWP is a modernist architectural icon**
- **The DLWP plays a key role in regeneration, attracting business and tourism to the area**

²⁵ Media coverage advertising equivalence (AD) is calculated by the number of opportunities to see (OTS) provided by the media, positioning, current advertising rate cost and PR value. The PR Value is calculated by the presence of Brighton Festival's key messages in each piece of coverage.

²⁶ Perceived Editorial Value is calculated by multiplying the total AEV by 3. This accounts for the 'higher value' of reading about the DLWP within editorial copy as opposed to an 'advert' of the DLWP

²⁷ Proof-Points are a PR calculation based on a combination of a number of factors influencing the value of a piece of media coverage such as the number of key messages, photography, positioning within the publication, editorial quality and the tiered level of the media (eg. national, regional, etc.)

- **The DLWP is a major regional, national and international contemporary art gallery**
 - **The DLWP plays a key role in local education and outreach to the local community**
- ‘DLWP Chair’ coverage**

The figures above include 22 articles in UK national press relating to the ‘DLWP Chair’ – a specially commissioned chair designed by Barber Osgerby and produced by Established & Sons for the DLWP. This coverage was of particular significance in that it portrayed the DLWP as a cutting-edge, modernist architectural icon across a range of national media titles whose readership includes some of the main ‘movers and shakers’ of the architectural and design industries (eg. *Blueprint*, *Building Design*, *Vogue*, *Design Week*, *Elle*, etc.). As such, this coverage contributed almost £171,000 to the post-reopening PPV within a relatively short space of time.

The actual PPV figure for the DLWP Chair coverage is much higher in reality as the majority of the coverage was from international press (eg. *Vogue (Australia)*, *Casa Vogue (Italy)*, *Decoration (Germany)*, *Jet (France and China)*, *El Pais (Spain)*, *OJE (Portugal)*, *Monitor (Russia)*, *Atium (Switzerland)*, *Elle Decoration (USA)*). However, as media data is not available for many international titles, and the advertorial ‘rate cards’ are structured differently to the UK, direct comparisons were not possible. It should be recognized, however, that the DLWP has achieved global impact through this coverage, the value of which is evident in communicating the DLWP brand to an international audience.

5. THE CULTURAL CONTRIBUTION OF DLWP

'A strong cultural offer in a locality makes a key contribution to quality of life, making it a desirable place to live, work, play, visit and do business'

SEEDA (2006) Review of the Regional Economic Strategy 2006 – 2016

'artistic and cultural value is elusive and wide ranging, relating to individual and collective experiences that cannot be meaningfully reduced to financial terms'²⁸

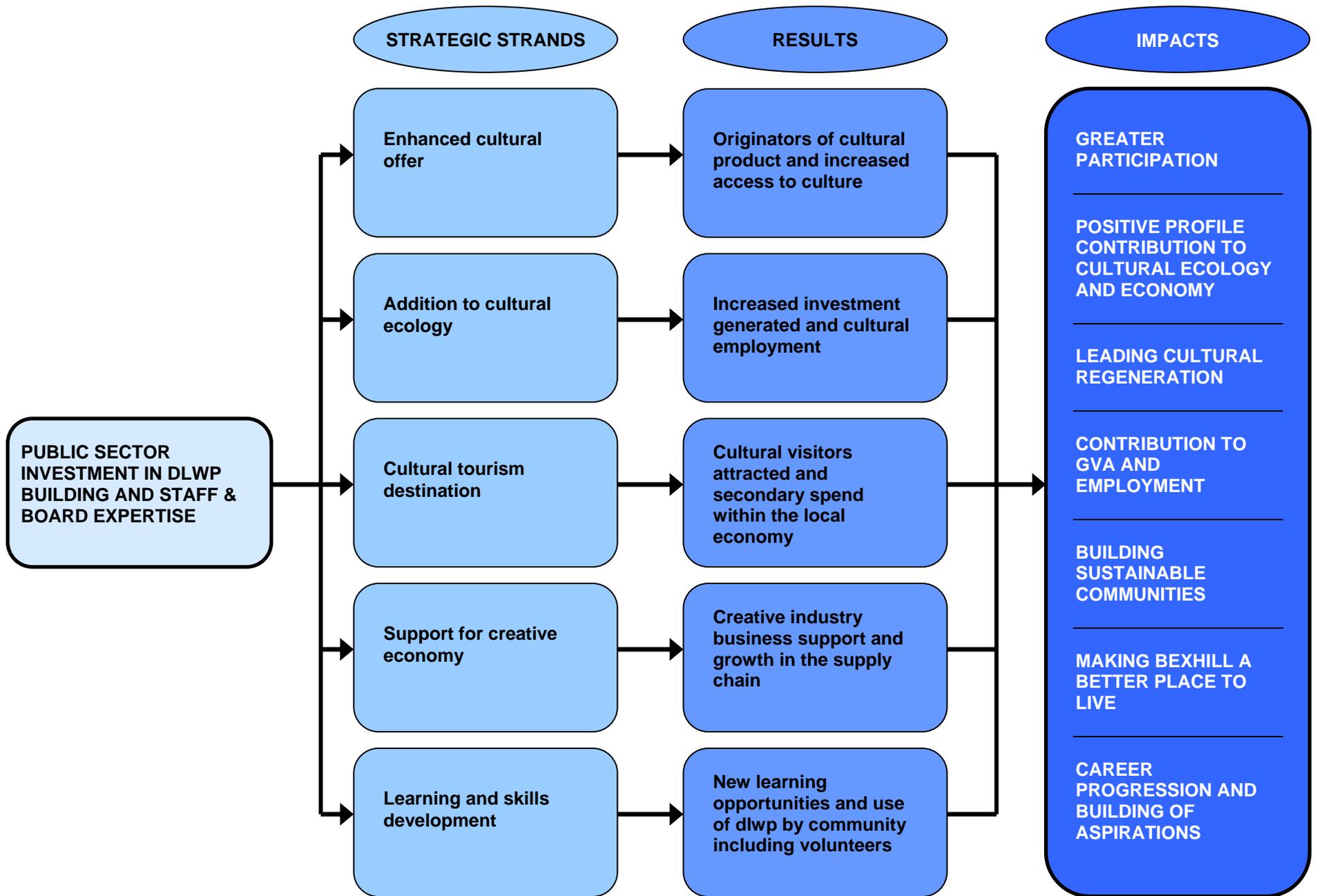
How is DLWP contributing to the culture ecology & economy and culture-led regeneration, both at local level and in the broader region? We have quantified the range and scale of DLWP's cultural activities, and the impacts these are generating.

Public sector investment in DLWP through capital and revenue funding and the expertise represented through staff and associate creatives is contributing to culture through the following strands:

- **enhancing the cultural offer** of Bexhill itself and the broader regional and national scale
- **adding to the cultural ecology**, complementing cultural provision in the South East through the creation and origination of new cultural product
- adding to the region's tourism offer, as a new **cultural destination**
- supporting the **creative economy**, both through the development of creative professionals, and the employment opportunities across the creative industries
- supporting **learning and skills development** at professional and community level

The relationship and ultimate outcome of these impacts are expressed in the model on the following page.

²⁸ Source: Throsby quoted in Valuing Culture in the South East. John Holden Demos 2005



These strategic strands and impacts are demonstrated through the DLWP activities and outputs as summarised below:

Enhanced cultural offer

The newly restored DLWP, an important and iconic 20th century building, contributes to the region's heritage provision. The newly equipped galleries, internal and external spaces provide new opportunities for artists and audiences. This results in,

Origination of new cultural content

Eight exhibitions originated by and curated at DLWP, bringing about...

- new relationships with arts institutions, major international museums and galleries
- presentation of work not previously seen before in the UK, from significant private collections
- press and media profile, through reviews and editorial

Two further exhibitions hosted by DLWP, through new partnerships with nationally important visual arts organisations.

Innovative events, such as *Live Art Weekend*, brought together performers, musicians, curators, writers and artists, demonstrating DLWP's role in pushing forward cultural boundaries and creative opportunities.

Increasing access to culture for all sections of the community.

Local audiences are directly benefiting from DLWP. There is limited cultural provision in Bexhill outside of DLWP. The nearest venues for professional performing arts are in Eastbourne, Hastings, Tunbridge Wells and Brighton. There are no other significant visual arts organisations (currently open to the public) within a one hour drive time of DLWP. At present over 27% of visits are undertaken by residents from Rother district, this accounts for more than 195,000 visits during the fifteen months since reopening.

Regional and local audiences are benefiting from the creation of **new cultural content** presented in a refurbished architectural icon. From October 2005 to March 2006 DLWP hosted 106 ticketed events, and over 20 free events.

The 60 or more talks and tours enable **deeper understanding of artistic practice** by participants through interaction with artists.

In addition to the onsite activity, the extensive press and media coverage generated by DLWP since reopening has brought **significant awareness of DLWP's cultural offer to a national audience.**

Through such activities, and through the relationships being created, the partnerships formed and the profile generated, **DLWP's contribution to Bexhill goes beyond the hard statistical evidence.**

In addition to the cultural infrastructure, DLWP also **expands the resources available to cultural promoters** providing a venue for 13 conferences and 30 corporate events hosted by DLWP

Adding to the cultural Ecology

The restoration of the building has attracted new investment of over £9 million in the cultural sector. This adds to the region's portfolio of significant cultural organisations. In the context of cultural ecology, through the expertise held by DLWP staff, and through the artists and creatives involved in the programme, it is bringing new culture opportunities into the areas cultural base. The results of this are,

- *Increased investment*
- *New employment opportunities in the cultural sector*
- *New cultural resources for local groups, with over 20 community events presented in the New, well equipped, high standard space*

A Destination for Cultural Tourism

'A British Landmark Regains its Splendor' – The New York Times²⁹

'The recently refurbished De La Warr Pavilion has been winning awards and pulling in flocks of culture vultures, re-establishing Bexhill as a premier visitor destination for lovers of art and architecture' – Business Edge³⁰

DLWP is putting Bexhill on the UK's cultural map. Since closure in 2003 over £3.5m in press and media coverage has helped to build DLWP's profile as a cultural leader, with critical acclaim for the restoration of an iconic building. The programme of exhibitions, events and other activities is attracting an audience from a widespread area. The results of this can be seen in comparison to the following,

²⁹ The New York Times, 06/11/07, 'A British Landmark Regains its Splendor'

³⁰ Business Edge, March 2007, 'Modernist World'

- *576,000 visits made to DLWP March 2006 – April 2007*³¹
- Baltic Centre for Contemporary Art = 600,000
- Tate St Ives = 241,000
- Tate Liverpool = 560,000
- Pallant House = 70,000 (predicted for first year of operation)

The DLWP is a new destination to which local residents can bring their visiting friends and family, and a new social focus for meeting, enjoyment and stimulation.

Support for the Creative Economy

DLWP is creating new employment and creative opportunities for artists through its exhibitions, commissions, publications and event programme. Through the purchase of goods and services it is also supporting the other creative industries in the region.

The results of this are:

60 artists have shown work, bringing artists of international status to the town, including Cindy Sherman, Mark Wallinger and Bruce McLean.

Emergent artists are also benefiting; involvement with DLWP is aiding career progression. For example, Jon Allen, who first showed work at DLWP, is now in the Singapore Biennale.

Eight new publications including catalogues and critical texts involving artists, writers and publishers.

12 new partnerships negotiated, placing DLWP alongside major national and international cultural innovators including Baltic, Hayward Gallery and Tate Liverpool plus regional galleries such as Fabrica, Towner (soon to be Eastbourne's new cultural centre) and Aspex (Portsmouth). Brighton Photo Biennial and Brighton Hip Hop Festival have also been developed.

33 designers and contemporary dealers have had the opportunity to build their business through Mid Century Modern – developing markets for local businesses such as ACME (Bexhill), High Street Retro (Hastings). This was a unique event in the UK, curated by Show Home in association with Elle Decoration.

Professional development of artists: DLWP programmes for artists are valuable in building capital in the cultural sector. DLWP has also supported Creative Industries Business Advisory Service in the creative industries sector and the ARC programme for the development of artists' business and creative practice

³¹ as comparators in the last financial year



As a cultural and creative business, DLWP is providing regular employment for a range of creative industries, locally and beyond Bexhill.

These include,

- Graphic designers
- Photographers
- Reprographic services
- Audio visual companies
- Framers
- Specialist makers for the gallery's installations
- Writers, editors and researchers
- Cultural marketing specialists
- A significant amount of equipment is also sourced locally

Seminars for creative industry professionals have provided training in business development for over 100 designers and makers, drawn from across the South East and London.

The DLWP artist professional development programmes, which include the ARC programme with other regional visual arts organisations has benefited **366 artists in 229 participatory sessions**, including artists of international status, such as Richard Wilson.

Learning and skills development

In this strand of its cultural activity, DLWP is meeting the regional agenda set out in The Cultural Learning Curve³². This discusses the importance of skills development within the cultural industries sector and sets out three learning and skills paradigms for the cultural and creative industries – 'skilling' *in* culture – the skills required to be an artist; 'skilling' *through* culture, resulting from engagement in cultural participation and 'skilling' *for* economic development.

Young people are finding new opportunities through DLWP's education and outreach role. There is an increasing emphasis on the importance of nurturing the creativity of young people, building the 'knowledge economy' and developing approaches to self expression, communication skills and confidence building. In an area where there is very little provision of activity for young people and where there is little evening economy, the DLWP is providing a range of opportunities for participation and engagement, both in a formal educational setting and beyond.

 ³² The Cultural Learning Curve: LSC, SEEDA, CSE

'In Bexhill, with its large population of retired and elderly people, youngsters often say they feel marginalised and mistrusted. The De La Warr team is committed to making young people feel included and welcome. They're even allowed to skateboard on the terrace'³³

2,305 attendances at family orientated events, such as The Big Draw and Sure Start Fun Days.
2,277 participations by young people at a range of events including photography projects, summer schemes and The Young Curators Programme.
30 new partnerships across many local sectors, including arts health care, Age Concern, Rother Race Action Forum, Creative Partnerships and Sure Start.

New investment is being attracted towards art and young people, through grant income of £32,000. Activity to seek further new investment to sustain and grow the programme is being undertaken by the DLWP who are currently in negotiation with potential funding organisations such as the Paul Hamlyn Foundation and Heritage Lottery Fund.

'The De La Warr Pavilion has scored a major success in hosting the prestigious Arts and Business South East awards night ceremony... The event puts the world-renowned Modernist icon at the very pinnacle of the arts and business movement' – Bexhill Observer³⁴

DLWP projects with schools have involved working with 42 teachers and 23 adults at events such as the Shakespeare in Schools and Art and Music Project which involved 634 students.

DLWP is also bringing artists into contact with young people, enabling them to work in a professional environment and to gain new insights into their own potential and future direction. DLWP artists such as Boyd Webb and Dave Martin have actively involved young people in their projects.

Adult education courses, mainly in partnership with Centre for Continuing Education, University of Sussex, involved 26 adults and two artists.

Volunteering opportunities have enabled the local community to engage in culture in ways which are rewarding and stimulating.

'The Ninth Earl of De La Warr had a vision of a new institution that would bring a fresh civic pride to the town of Bexhill: "The re-opening of the refurbished Pavilion last Autumn, shortly before its 70th birthday, has given us all the opportunity to recreate his vision of a modern idiom, fit for this new century" ' – Bexhill Observer³⁵

³³ The Guardian, 08/05/07: 'A Chance to Show Their True Colours'

³⁴ Bexhill Observer, 23/06/06, 'Pavilion hosts top arts and business awards'

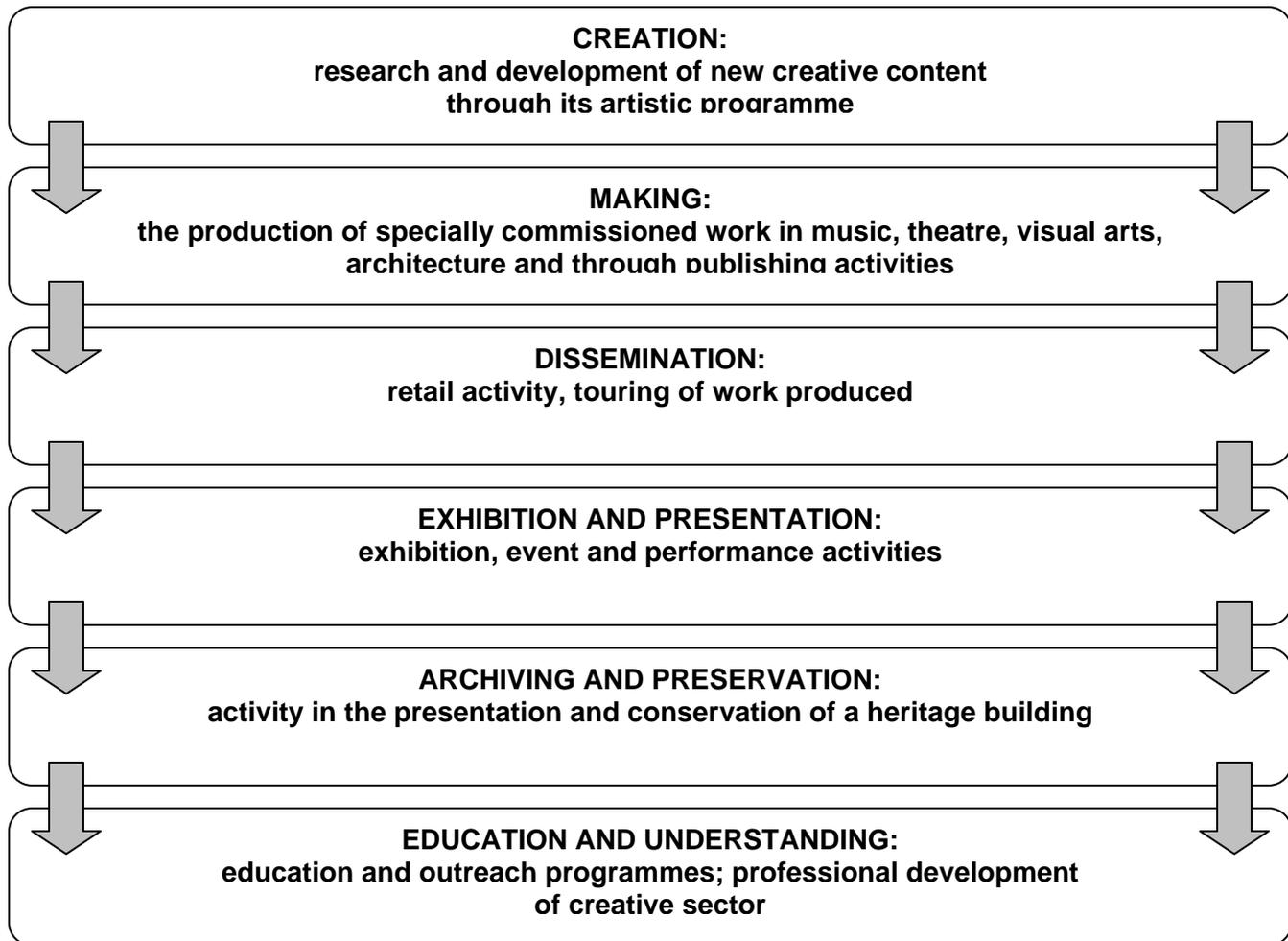
³⁵ Bexhill Observer, 02/06/06, 'Duchess of Cornwall at De La Warr Pavilion'

DLWP and the Creation Cycle

In a strategic context, this section turns to look at DLWP's impact on the area's cultural framework.

Cultural mapping of the Hastings and Bexhill cultural sector group, undertaken by **sam** and Professor Colin Mercer in 2006, identifies that some parts of the area's cultural sector is in growth³⁶. This 'growth' in cultural sector employment increased by 25% over the past five years and is weighted toward the 'demand' and consumption side of tourism and cultural employment. The 'supply' side of new infrastructure and creative cultural content shows only 1.3% growth.

DLWP is contributing to the 'creation cycle', a framework developed by DCMS in *The Evidence Toolkit*³⁷ to assess cultural economy and ecology. It links all aspects of the creative process, from origination of creative content to consumption of cultural product.



³⁶ Source: Hastings and Bexhill Cultural Mapping. Commissioned by Hastings and Bexhill Cultural Sector Group. sam

³⁷ DCMS Evidence Toolkit, DET, August 2004

The cultural mapping indicates that the investment in culture-led regeneration in the area needs to be made in a systematic and sustainable way. There is growth in initiatives in education, notably University Centre Hastings, and in the informal cultural sector, through networks and project based work.

A policy and planning architecture which manages the cultural sector for maximum synergy between the subsidised and commercial sectors and arts, heritage, tourism and place-making needs to be put in place – ‘joining up’ various portfolios for the area’s cultural resource base.

The DLWP already contributes to the cultural economy and cultural ecology of the Hastings and Bexhill area, but its contribution could be substantially increased if a revised approach to collaboration and culture-led regeneration were to be designed.

DLWP through the combination of the physical asset of the building itself and of an organisation of expert creative professionals is a catalyst with the potential to drive culture-led regeneration. But we need to be objective about the barriers facing DLWP in reaching its potential, both as a cultural organisation and as an economic driver.

Whilst there is a newly restored DLWP, the surrounding areas of Bexhill Sea Front and Town Centre are not yet at the same stage of regeneration.

These problems are identified in the Locum Destination Management Strategy report³⁸ on the 1066 brand. This discusses the need for ‘Bexhill to gain maximum benefit from the reopening of DLWP, the significant national and regional media exposure received and the growing visitor numbers’, including recommendations that the DLWP should spearhead artistic and cultural development, in partnership with other cultural attractions, to bring more tourism into the area.

There is a fundamental issue which we feel is affecting the success of DLWP, and which is impacting on reaching its full potential as an economic driver. This focuses on the weak infrastructure of Bexhill itself and the extended environment in which DLWP operates.

As part of their work on the Destination Management Strategy for 1066, Locum Consulting summarised their research on the weaknesses of Bexhill.

³⁸ 1066 Country Destination Management Strategy. Locum Consulting for Hastings & Bexhill Investment, Framework, SeaSpace and 1066 Country Marketing Partnership. Jan 2007

These included:

- Lack of clear identity of the town and poor image
- Unbalanced demographic mix, with double the national average of retired people and 52% in active employment (national average 60%)
- Lack of quality entertainment
- 'under-shopped' with a lack of high-street retailers and lack of retail units to meet the demands of the sector
- Not enough customers and a poor retail offer with many charity shops
- Inadequate investment in the public realm

The cultural impacts of DLWP in summary...

- greater participation
- contribution of a positive profile for Bexhill and the wider area
- addition to the areas cultural economy and ecology, as a new cultural driver and destination
- visitor spend, employment and business activity are contributing to Rother's GVA
- creation and delivery of opportunities in learning and skills development are contributing to sustainable communities, career development and to building the aspirations of participants
- addition of a new community and cultural focus for Bexhill and the wider region

DLWP and Regeneration

'Jon Ladd [head of British Urban Regeneration Association] says: "In the 21st century, a seaside town can't simply rely on bucket-and-spade holiday makers in summer. Towns have potential, not only for new businesses, but for creative communities who may want to locate there.' – Daily Telegraph³⁹

There is widespread expectation amongst stakeholders and investors in DLWP that it will be a catalyst for the regeneration of the area.

The refurbishment of the De La Warr Pavilion is seen as an important development within the existing cultural provision in Bexhill and Rother District. The 'iconic' building and its past and future importance is frequently commented upon. However, the De La Warr does not appear to have a central function in regeneration proposals or strategies, rather it is a separate organisation that happens to be situated on the seafront in Bexhill. From the plans reviewed where does the De La Warr Pavilion sit as a partner in, or focus for, current or future regeneration initiatives? Plans to develop tourism, the evening economy, the seafront or the

town centre fail to make links about how a closer relationship with the Pavilion could be a way to bring about change.

DLWP's contribution to regeneration through culture...

- It is providing a catalyst for culture-led regeneration, both through its presence as a physical asset in the cultural fabric of the region; as a restored iconic building and through the cultural activity and content it creates.
- There is increasing evidence that participation in cultural activity supports the development of new skills, aspirations and self esteem. DLWP's education and outreach programme, alongside its professional development role is fulfilling an important role in the area.
- Its visitors, press and media profile, and business activity is benefiting the local economy.

There are real opportunities to be explored looking at new relationships between the De La Warr Pavilion and regeneration stakeholders, to find ways that the Pavilion and by association culture, can be central to future planning for Rother District and Bexhill.

It's time to join up the thinking!

In order to assess where DLWP is actually placed within current thinking about area regeneration, we have set out below key points from the published policies, strategies and business plans of the main stakeholders, and those organisations and agencies which have responsibility for implementation of regeneration.

SeaSpace in Bexhill

Following extensive research and public consultation, the SeaSpace business plan provided for '*a comprehensive regeneration of Bexhill Town Centre where initial development will focus on key sites accommodating business/education space, hotel, residential and commercial activity*' (SeaSpace Business Plan). Although the plan is general in nature, the DLWP is not referenced at all despite its location and the restoration that was already in the planning stages when this SeaSpace plan was devised.

SeaSpace Business Plan provides clear suggestions for the development of new media, IT and high-tech business start up opportunities. However, when the plan is revised it would be timely to address the role of culture and how it could configure in the wide ranging, ambitious and exciting regeneration plans. The plans are focused on growing and improving the built environment and the projects for a University Centre, a Media Centre and an Innovation Centre are as such, welcome. But it is timely to look more holistically at the creative economy of the area and how best to weave together players such as UCH and DLWP in order to maximise their potential.

Despite the iconic DLWP image on the front of the plan, we note the omission of any written reference to DLWP and its redevelopment, and how this could impact on Bexhill Town Centre.

This study gives evidence of how DLWP is attracting visitors to the area, stimulating creativity, and repositioning Bexhill as a cultural focus. **But if this role could be substantially increased through increased investment in order to create a world class cultural destination.** Obviously the key issue is sourcing appropriate revenue funding to create high profile cultural product at DLWP.

Rother Local Strategic Partnership: Your Culture & Leisure 2005 – 2010

Ploszajski Lynch Consulting Ltd

This report states the restoration of the DLWP is a key element in the regeneration strategy for the local area and that the building will be ***‘the principal centre for contemporary art, architecture, education and entertainment in the south-east. It is envisaged that the organisation will help contribute upwards of £3m to the local economy’***. It states that outside of London, the DLWP has the largest exhibition space in the south-east. From the evidence given in this Study, DLWP is certainly fulfilling its role as a contributor to the local economy.

Rother District Council: Economic Regeneration Strategy 2004 – 2009

One of the seven key aims is ‘meeting the social, leisure and cultural needs of the community’. Current cultural provision is not listed and the cultural strategy had not yet been written when this report was produced.

Whilst there is no specific mention of the DLWP, Rother District Council are a major champion and investor in DLWP, and it would be opportune to create a strategy which integrates the various roles that DLWP could fulfill in regenerating Rother’s cultural ecology.

Rother District Council: Corporate Plan 2006 – 2016

Rother District Council plan setting out a vision for the future of the district. The vision statement sets out ***“we want to see more leisure and cultural opportunities as a basis for healthy community life”***. Rother DC’s investment and championing of DLWP is showing return on this investment, both economically, culturally and in terms of creating a positive profile and enhanced sense of place.

Rother District Council: Rother Community Plan

Making Things Better by Working Together 2004 – 2009

Broad ranging, district wide Community Plan. The stated ambition is to provide “**year round opportunities for local people and visitors to access and participate in a wide range of culture and leisure**”.

DLWP is used by a variety of local and community organisations who benefit from its programme of activity and by the use of new, professional, high quality spaces and resources.

Rother District Council: Hastings and Bexhill Seafront Strategy

Leading from the Front, GHK, May 2005

This strategy talks about enhancing the quality of the environment ‘**to complement the draw of the refurbished De La Warr Pavilion**’.

It would be opportune to devise and implement urban design schemes which integrate DLWP into the main areas of the town centre and seafront, to show off the building to its full advantage as a focal point of the Town.

Rother District Council: Bexhill Town Centre - A Framework for Regeneration and Development, December 2005

This report draws on the various studies and plans for Bexhill to set out ‘*inter-related principles*’. Such plans include the repair and improvement of Bexhill Town Centre Conservation Area; the plans for environmental improvement to the seafront and the setting of DLWP, the five point plan for the regeneration of Hastings and Bexhill, and its main themes, which include ‘urban renaissance’, the *Hastings and Bexhill Seafront Strategy*, which aims to improve the evening economy and restaurant offer and promoting the seafront as a focus for activity during the day, in order to complement DLWP’s draw.

The presence of DLWP is seen as a one of Rother’s strengths, alongside evidence of an ‘*emerging café culture*’, the seafront and its proximity to the town centre. Weaknesses are cited as low footfall, low presence of high street multiples, poor location of railway stations, a lack of conservation of architecturally important building stock and ‘*a poor quality public realm*’.

In setting out aspirations for the town, the vision is to create ‘*a stylish seaside town*’ through substantial improvement to market conditions; drawing all the specific character of particular central zones of the town; the commercial centre, the Edwardian core and the seafront. **DLWP is referenced in those aspirations as ‘an arts and entertainment venue of national importance’ with a high profile draw for visitors from further a field as well as local patrons. It states that appropriate additional infrastructure and enhancing the setting of**

DLWP and other visitor buildings on the seafront is needed to ‘strengthen the town interface and the quality of the promenade experience’.

Hastings and Bexhill Economic Alliance (and other partners)

Climbing The Ladder

Local Enterprise Growth Initiative and East Sussex Local Area Agreement – July 2005

This advisory document proposes the Baird Film and Television Initiative, which aims to build skills in the creation and production of film. This now has funding and is currently being set-up involving the communities of Hastings and Bexhill and may be an opportunity for the creative involvement of DLWP.

The DLWP is mentioned as a key venue for a CPD programme, running until July 2007.

Creative Partnerships – Hastings and East Sussex

Area Delivery Plan 2005 – 10 (2005)

Creative Partnerships, funded by DFES and DCMS, has a specific brief to provide arts and learning opportunities for young people to raise aspirations, skills and achievements and support schools’ approaches to culture and creativity.

The DLWP is participating in “Culture Shared”, a programme that includes:

- an initial Continued Professional Development (CPD) scheme
- a mentoring programme
- seed funding to support the formation of new partnerships between 11 East Sussex specialist schools and 11 venue based heritage and cultural organizations. This initiative will realize 11 unique projects across East Sussex. The De La Warr will work with Bexhill High School and St Richard’s Catholic School, Bexhill.

SEEDA Regional Economic Strategy

In his position paper on culture in the South East, John Holden, responding to the SEEDA Regional Economic Strategy (RES) sums up a broader concern which is of relevance to DLWP and its role in the region’s cultural and economic base:

‘the cultural infrastructure needs to be part of infrastructural thinking, but it does not seem to feature in the RES in this way’⁴⁰

He goes on to state his position on the wider benefits of culture through its contribution to

- employment and regeneration

- opportunities for learning with socially excluded younger and older people
- shared social space for the wider community
- cultural participation by young people influencing the development of their basic skills and literacy

Holden stresses the need for SEEDA to reconsider its approach to the process of maximising cultural value and *'direct investment of time and money in culture-led regeneration'*⁴¹.

APPENDICES

- i. Calculating the value of spend by DLWP visitors in the economy.
- ii. Press & Media evaluation methodology and further data

i) Calculating the value of spend by DLWP visitors in the economy

Having established, through the primary research, the figures for average expenditure and visitor location, these figures were modelled against the estimated 311,551 visits that had a direct additional impact upon Rother and the South East for the 12 month period 2006 - 07. Additional spend excludes any expenditure by Rother residents.

The following calculation was used to set out the value to the economy of visitors to DLWP.

Total number of DLWP visits
x percentage of visits from a designated location
x average spend for that designated location

Example:

Total number of DLWP visits **(311,551)**
x percentage of visits from a designated location **(Hastings accounts for 15% of all visits = 47,044)**
x average spend for that designated location **(£14.48)**

$$311,551 \times 15\% = 47,044 \times £14.48 = £681,200$$

ii) Press and media evaluation methodology and further data

DLWP coverage was valued according to three main metrics:

Advertising equivalent value (AEV) – a value which is approximately equal to the value of the coverage to the advertising industry (ie. what it would cost you to take out an advert with similar impact). This value is often used within the PR industry and is calculated according to the number of opportunities to see (OTS), the positioning of the coverage, the current advertising rate and PR value. The PR value is calculated according to the presence of key messages within each piece of coverage.

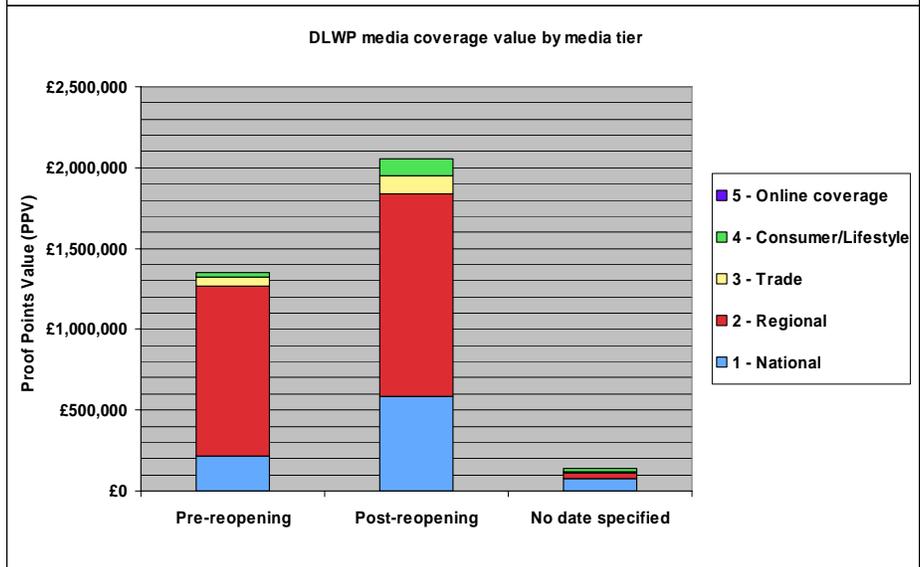
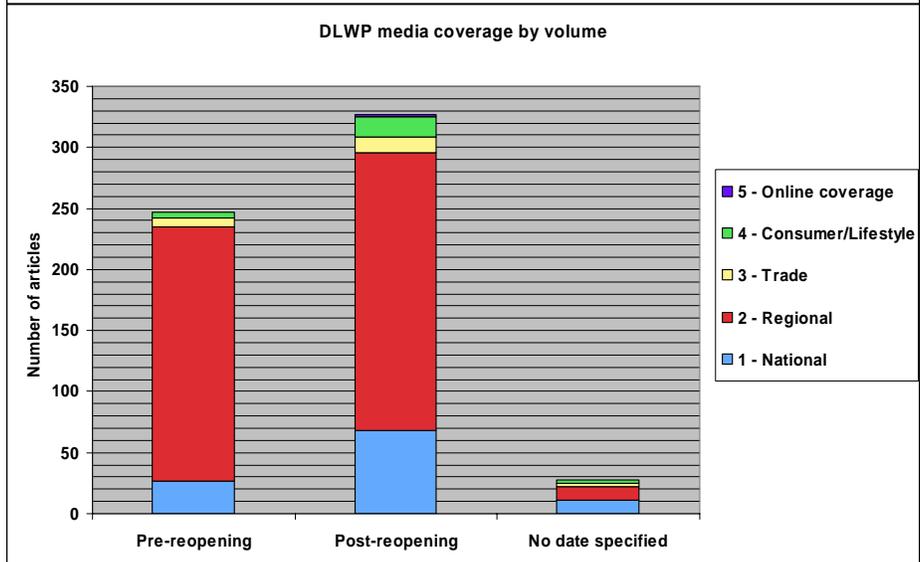
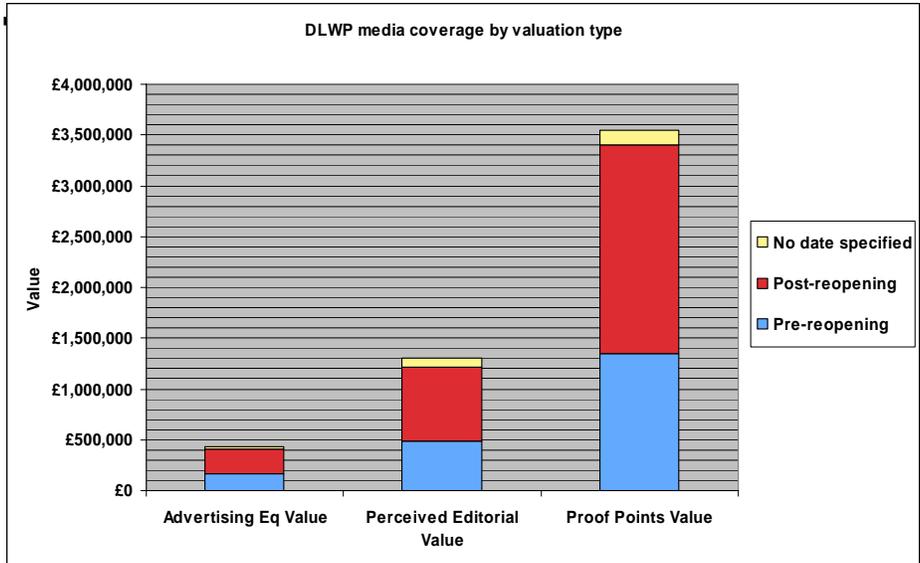
Perceived editorial value (PEV) – calculated by multiplying the AEV by a factor of 3. This takes into account the ‘higher value’ of reading about the DLWP within editorial copy.

Proof Points value (PPV) – the Proof Point media evaluation system uses quantitative and qualitative evaluation methods to quantify the impact of media coverage and to provide a financial value as an aid to compare the impact of PR over advertising. The calculations are based on the following degree of evaluation:

- **Target tier media:** this breaks down the media in order of targets or to provide an overview of the different media that has covered a story. A list of tiers used to evaluate the DLWP coverage is given below
- **Photography:** photos not only increase the size of an article but also add value to the impact of the media coverage
- **Key messages:** articles are carefully read and the number of key messages included is documented. This enables **sam** to assess how effective an article is in delivering key messages to audiences. It is also noted if the article features a call-to-action such as a web address or telephone number
- **Editorial tone:** each article is assessed to determine the editorial tone. This includes the following criteria: positive tone about the company, strong endorsement of the company, a positive comparison with a competitor, a positive headline or a negative tone
- **Positioning:** just like in advertising, where an article is positioned on the page can have a considerable impact on its value. All media coverage is assessed as follows: does it have a strong position in a relevant feature, does it appear in the news pages or is on the front cover? etc.

As part of the evaluation, media in which DLWP coverage appeared was 'tiered' to account for the relevance and impact of certain titles over others. Tier 1 (national) is the strongest, with Tier 5 (online) offering the lowest impact.

- Tier 1 - National
- Tier 2 - Regional
- Tier 3 - Trade
- Tier 4 - Consumer / Lifestyle
- Tier 5 - Online coverage



DLWP coverage by media title and pre- to post-reopening change in volume

Publication name	Tier rating	Number of articles (pre-)	Number of articles (post-)	Change
24 Hour Museum	3	0	1	1
AN Magazine	3	0	1	1
Architects Choice	3	0	1	1
Architecture Today	4	0	1	1
Art Monthly	3	1	0	-1
Art Review	4	0	1	1
Art Work	3	0	1	1
BBC	1	1	3	2
BBC News Online/Interactive	1	0	1	1
Beverage Innovation	2	2	1	-1
Bexhill Observer & News Series	2	199	189	-10
Blueprint	3	0	7	7
Building Design	3	2	1	-1
Business Edge	2	0	2	2
BusinessWeek	3	0	1	1
Caterer & Hotelkeeper	3	0	1	1
Country Life	4	1	0	-1
Daily Express	1	0	1	1
Design Week	4	0	2	2
East Grinstead Courier	2	1	0	-1
Eastbourne & District Advertiser	2	0	2	2
Eastbourne Gazette & Herald Series	2	1	3	2
Elle	4	0	3	3
Elle Decoration	4	0	1	1
Evening Standard	1	2	6	4
Express & Star	2	0	1	1
Financial Times	1	1	3	2
FT Magazine	1	0	1	1
German Broadcasting	4	0	1	1
GQ	4	0	1	1
Group Travel Organiser	4	1	0	-1
Guardian Unlimited	1	0	1	1
Hastings Observer & News Series	2	3	7	4
Heritage Today	3	0	1	1
High Life	4	1	0	-1
Icon	3	1	1	0
Independent Magazine	1	0	1	1
Insight	3	1	1	0

Publication name	Tier rating	Number of articles (pre-)	Number of articles (post-)	Change
JetAway	1	0	1	1
Kent & Sussex Courier	2	2	1	-1
Leisure Opportunities	4	0	1	1
Leisure Painter	4	0	1	1
Littlehampton Gazette	2	1	2	1
Living Etc.	1	0	1	1
London Newspaper Group	2	0	1	1
Museums & Heritage	4	0	1	1
New Start	3	0	1	1
RIBA Journal	3	1	0	-1
Seven	4	0	1	1
Shropshire Star	2	0	1	1
South East Today	2	1	0	-1
St Albans Observer	2	0	1	1
Sunday Express	1	0	1	1
Sunday Times	1	0	1	1
Sussex Life	4	1	3	2
Telegraph Magazine	1	0	2	2
telegraph.co.uk	1	0	1	1
The Architects' Journal	3	1	0	-1
The Argus	1	1	15	14
The Courier	2	1	0	-1
The Daily Telegraph	1	2	3	1
The Guardian	1	3	13	10
The Independent	1	6	19	13
The National Trust Magazine	4	0	1	1
The New York Times	1	0	1	1
The Observer	1	0	1	1
The Scotsman	2	0	1	1
The Stage	4	1	1	0
The Sun	1	0	1	1
The Sunday Telegraph	1	1	2	1
The Sunday Times	1	1	1	0
The Times	1	3	5	2
Tonbridge Courier	1	0	1	1
Vogue	4	0	3	3
Wealden Advertiser	2	2	1	-1
Wedding	1	0	1	1
Word and Music	1	0	2	2
World of Interiors	1	0	1	1
Worthing Herald & Advertiser	2	0	1	1
		218	249	31

Volume and value of DLWP pre-reopening				
Media tier	Volume (articles)	AE Value	PE Value	Total PP Value
1 - National	27	£23,267.03	£69,801.08	£214,750.00
2 - Regional	208	£87,578.78	£262,736.33	£1,050,175.00
3 - Trade	7	£48,541.14	£145,623.42	£60,950.00
4 - Consumer/Lifestyle	5	£2,792.72	£8,378.16	£23,300.00
5 - Online coverage	0	£0.00	£0.00	£0.00
	247	£162,179.66	£486,538.99	£1,349,175.00

Volume and value of DLWP coverage post-reopening				
Media tier	Volume (articles)	AE Value	PE Value	Total PP Value
1 - National	68	£39,006.08	£117,018.23	£587,100.00
2 - Regional	228	£105,267.16	£315,801.47	£1,252,000.00
3 - Trade	13	£32,921.56	£98,764.68	£110,000.00
4 - Consumer/Lifestyle	16	£66,049.39	£198,148.17	£102,950.00
5 - Online coverage	2	£62.19	£186.56	£5,000.00
	327	£243,306.37	£729,919.11	£2,057,050.00

Volume and value of DLWP coverage (no date specified)				
Media tier	Volume (articles)	AE Value	PE Value	Total PP Value
1 - National	11	£10,973.86	£32,621.59	£76,750.00
2 - Regional	11	£6,591.88	£19,775.63	£31,200.00
3 - Trade	3	£2,654.14	£7,962.43	£10,400.00
4 - Consumer/Lifestyle	3	£10,499.89	£31,499.68	£20,350.00
5 - Online coverage	0	£0.00	£0.00	£0.00
	28	£30,719.78	£91,859.33	£138,700.00

Media tier by PPV			
Media tier	Pre-reopening	Post-reopening	No date specified
1 - National	£214,750	£587,100	£76,750
2 - Regional	£1,050,175	£1,252,000	£31,200
3 - Trade	£60,950	£110,000	£10,400
4 - Consumer/Lifestyle	£23,300	£102,950	£20,350
5 - Online coverage	£0	£5,000	£0
	£1,349,175	£2,057,050	£138,700

Media tier by volume			
Media tier	Pre-reopening	Post-reopening	No date specified
1 - National	27	68	11
2 - Regional	208	228	11
3 - Trade	7	13	3
4 - Consumer/Lifestyle	5	16	3
5 - Online coverage	0	2	0
	247	327	28

Valuation of coverage by reopening period			
Media tier	Pre-reopening	Post-reopening	No date specified
Advertising Eq Value	£162,180	£243,306	£30,720
Perceived Editorial Value	£486,539	£729,919	£91,859
Proof Points Value	£1,349,175	£2,057,050	£138,700
	£1,997,894	£3,030,275	£261,279

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