



Creating an Inclusive Creative Arts Venue in Newcastle

Research into Market Demand

Conducted 2022

Published 2023



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Introduction

Boho Arts approached the research project with the following perceptions:

1. Newcastle upon Tyne was lacking creative, inclusive, accessible spaces, that were both affordable and city centre located.
2. The existing spaces in the city were often out of reach for creative and community organisations or grassroots groups both in terms of cost and 'vibe' – i.e., they are too commercially focused, set up primarily for businesses or corporate activities and are not minded to accommodate creative groups, workshops or performances.
3. There was a demand for such a space from the cultural and creative community and from the end beneficiaries, i.e., members of the public who may attend events, performances, workshops or creative gatherings.

The findings of the research, conducted in two phases between May and September 2022 support the idea that an inclusive and accessible creative hub is indeed something that the Newcastle-based community of creatives feel is currently missing, are eager to see come to fruition and would use or attend.

Initially, a target market of c.60,000 people working in the creative and cultural sectors is viable



Purpose

Boho Arts is a registered charity with the purpose: "To advance the arts for the public benefit in particular but not exclusively through opportunities to partake in performing arts and attend theatrical performances, the provision of drama, improvisation, film making, music, literature, visual art and other arts workshops."

The founders and executive directors of the organisation have over 30 years' experience in various aspects of the performing arts, and work regularly with partners across Newcastle upon Tyne and the wider North East. They have a particular passion for developing audiences and communities by creating accessible, inclusive, and diverse spaces and activities where people can connect with and explore the arts.

As part of their commitment to this mission, Boho Arts seek to develop an accessible and creative community arts hub (from this point, referred to as the Hub) within 'Creative Central NCL' (formerly named Newcastle Cultural and Creative Zone).

Boho Arts have identified a vacant property, a former clothes wholesale store, made up of three connected buildings. Selected for its size and location, the property is situated on Scotswood Road, near Centre for Life, only 600 meters from Newcastle Central Station and Metro, with numerous bus routes and parking facilities nearby. Having Change of Use and Full Planning Permission to redevelop the premises, Boho Arts intends to create a Hub which will include:

- **a welcome reception area and box office**
- **a cafe-bar**
- **a small theatre / flexi workshop and expo space**
- **four workshop and rehearsal rooms**
- **co-working offices**
- **digital and hybrid facilities**
- **a secure bike park**
- **a roof garden / outdoor space**
- **green energy**



The research, which includes both qualitative and quantitative, is designed to establish the need for a space such as the Hub.

The research engages both '**Bookers**': people from the creative and cultural community who book or are interested in booking spaces to host events or activities, and the '**Attendees – the end beneficiaries**': people who currently attend or would like to attend creative events and activities.

The research has been carried out by cultural marketing and communications agency 'Crystallised' for Boho Arts, funded by 'North of Tyne Combined Authority', administered through 'Creative UK's North of Tyne Culture and Creative Investment Programme'.





Approach

Research was conducted with two audience groups.

Audience 1, Bookers

Workers or volunteers in the arts, creative, cultural, heritage, community and charity sectors of the North East, more specifically Newcastle upon Tyne, who book space for their organisations or their own practice.

	Respondents	When
Quantitative Research (surveys)	186	2nd May to 6th June 2022
Qualitative Research (focus groups)	12	8 th to 12 th August 2022

Audience 2, Attendees

Individuals who live in the North East who currently attend or are interested in attending creative events and activities, be that as part of their leisure time or as part of a hobby, artistic practice or profession.

	Respondents	When
Quantitative Research (surveys)	217	1 st to 15 th September 2022

Audience 1

Bookers



Audience 1: Bookers

Audience 1: Workers or volunteers in the arts, creative, cultural, heritage, community and charity sectors of the North East, more specifically in Newcastle upon Tyne, who book space for their organisations or their own practice.

186 respondents participated and are segmented as follows:

		Respondents
Current Bookers	Currently booking space in Newcastle	74
Potential Bookers	Would be interested to book or anticipate they will need to do so in the future	63
Attendees	Does not book space, only attends events	49

Those people who only attend events but do not book space are disqualified from this data, and instead were invited to participate with Audience 2.

Therefore:

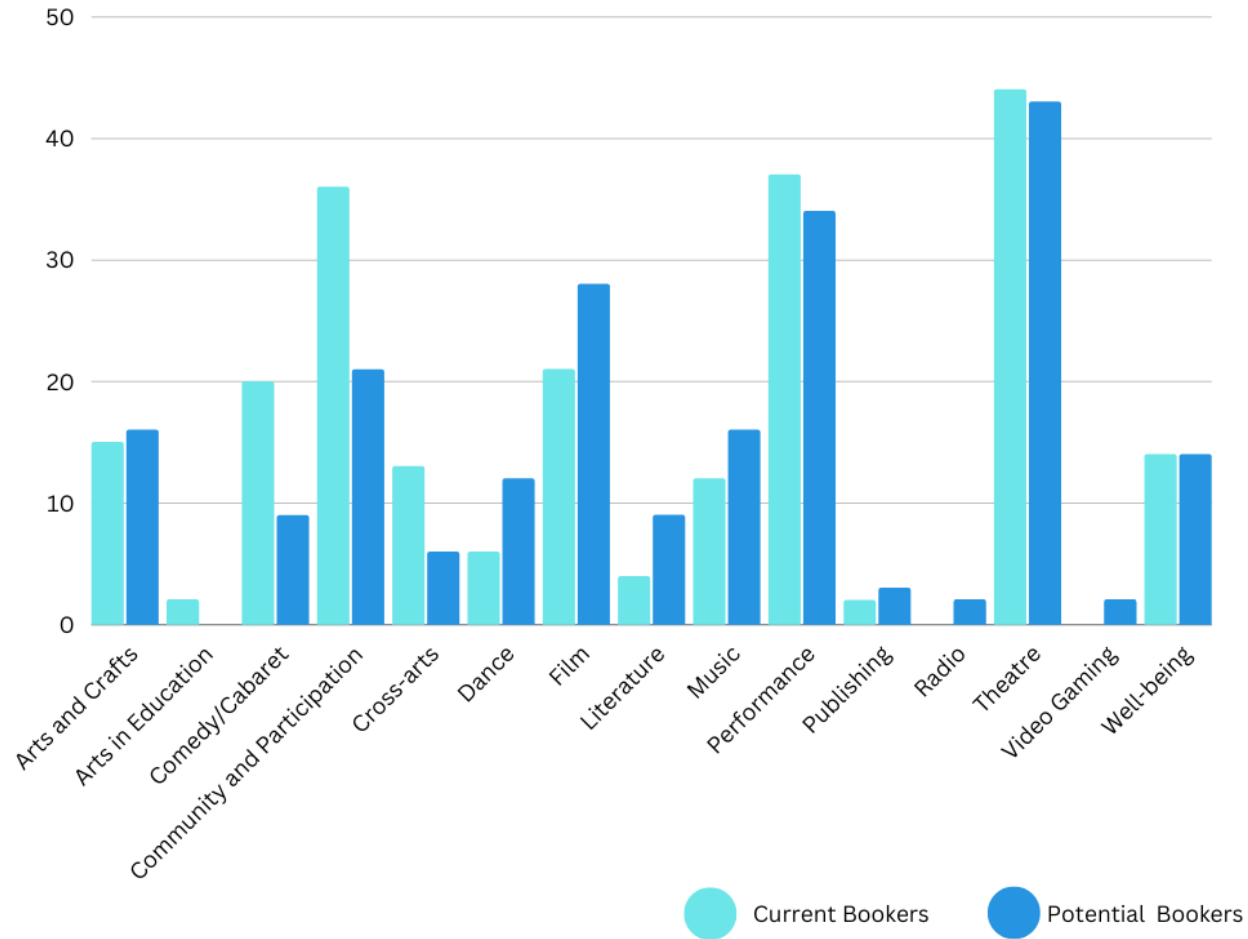
- **Audience 1A, Current Bookers 74 (55%)** comprises of people who are currently booking space
- **Audience 1B, Potential Bookers 63 (45%)** comprises of people who are interested in booking space in the future.



Audience 1: Bookers / Age, Gender & Ethnicity Demographics

<p>A pie chart illustrating the age distribution of 84 respondents. The largest segment is 25-34 at 27.4%, followed by 35-44 at 26.2%, 55-64 at 20.2%, 45-54 at 17.9%, 18-24 at 7.1%, and 65+ at 1.2%.</p>	<p>A pie chart illustrating the gender distribution of 84 respondents. The largest segment is Woman at 56.3%, followed by Man at 33.8%, Non-binary at 8.8%, and Trans Woman at 1.3%.</p>	<p>A pie chart illustrating the ethnicity distribution of 86 respondents. The vast majority is White at 95.1%, with Mixed Asian at 3.7% and Asian at 1.2%.</p>
<p>Of the 137 respondents, 84 answered this question, 53 chose to skip.</p>	<p>Of the 137 respondents, 84 answered this question, within that and not shown in the graph, 4 people preferred not to answer, 1 person preferred to self-describe as gender fluid, 53 chose to skip.</p>	<p>Of the 137 respondents, 86 answered this question, within that and not shown in the graph are 5 people preferred not to answer, 51 chose to skip.</p>

Audience 1 / Art forms represented

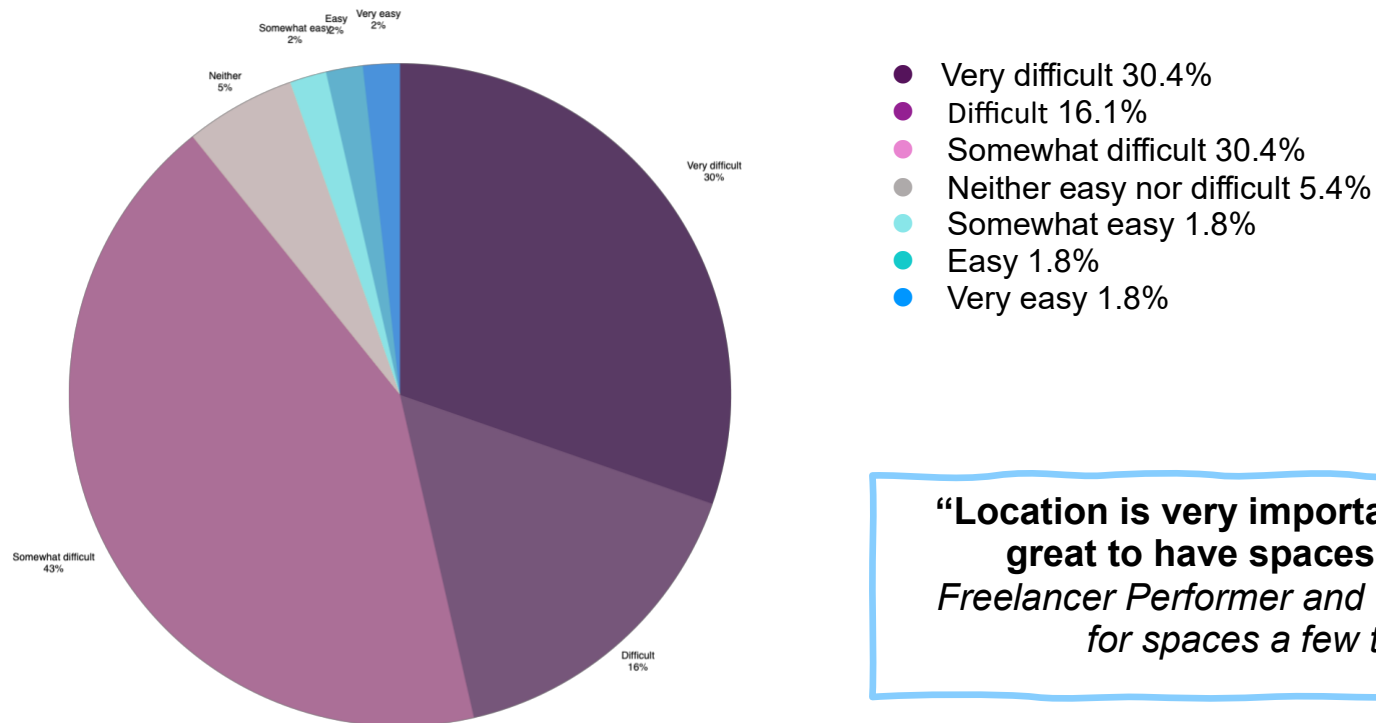




Audience 1A: Current Bookers' Frustrations

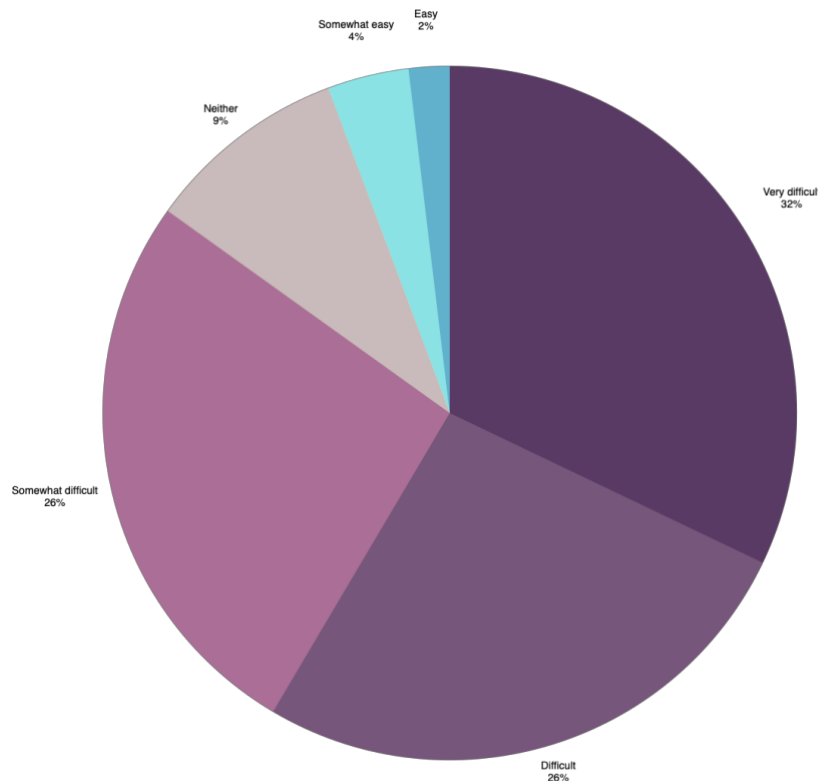
Most people who are currently booking space say they find it somewhat difficult, difficult or very difficult to find centrally located spaces (89%), accessible spaces (85%) which suit their budget (84%). A fourth frustration was from those looking for spaces that can accommodate children and young people (76%) which are few and far between.

Q: How easy/difficult is it to find spaces that are Centrally Located?



“Location is very important. It would be great to have spaces near a Metro.”
Freelancer Performer and Teacher looking for spaces a few times per month

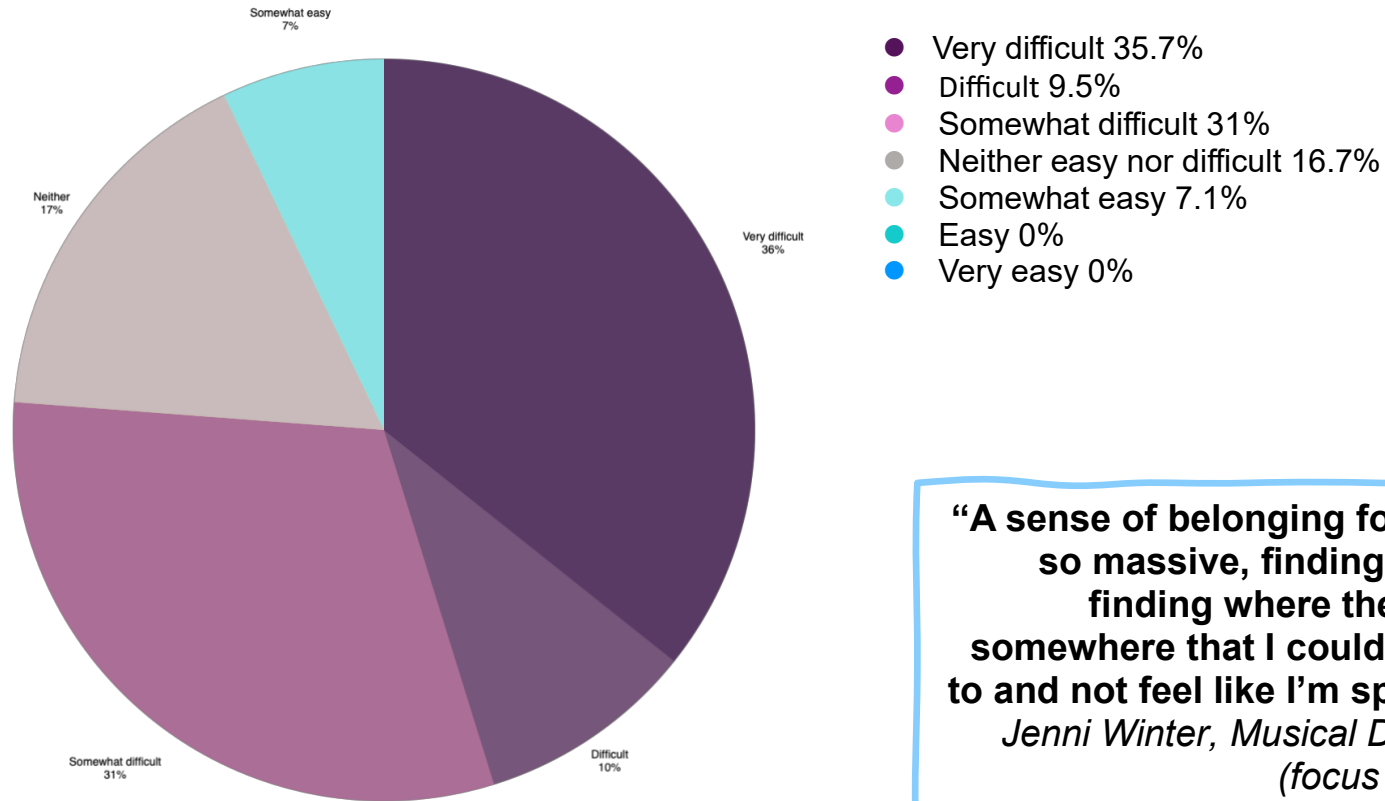
Q: How easy/difficult is it to find spaces that are Accessible?



- Very difficult 32.1%
- Difficult 26.4%
- Somewhat difficult 26.4%
- Neither easy nor difficult 9.4%
- Somewhat easy 3.8%
- Easy 1.9%
- Very easy 0%

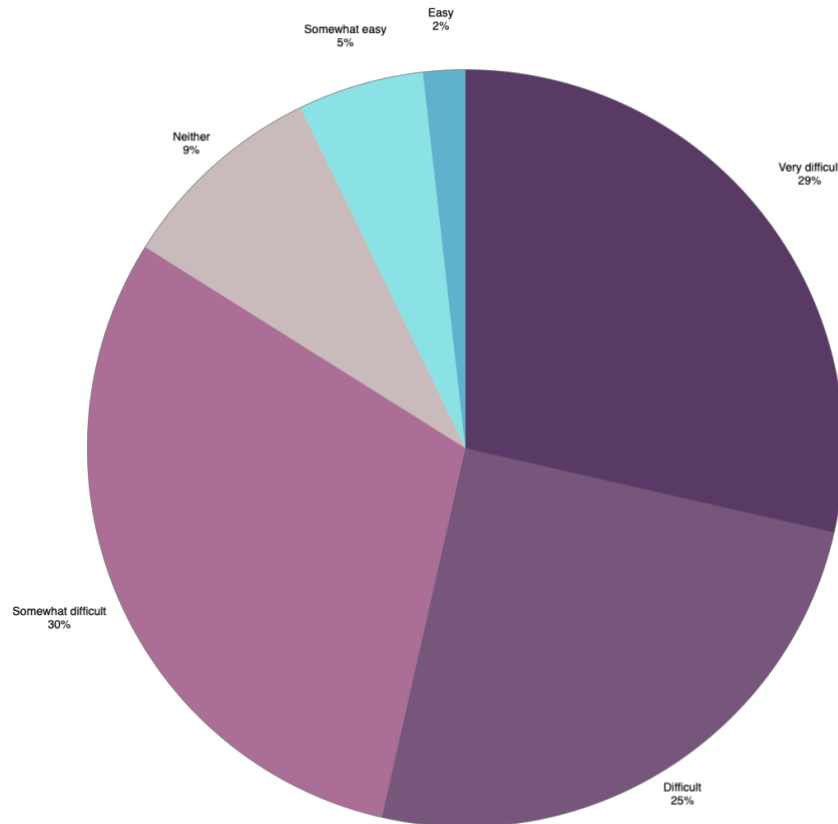
“Local availability is often difficult unless booking way in advance. Many spaces are booked on an ongoing basis by the same clients making them unavailable week to week. Disability access in smaller performance spaces is limited.”
Freelancer and Musician looking for space every 8 weeks

Q: How easy/difficult is it to find spaces that are suitable for children and young people?



“A sense of belonging for a teenager is so massive, finding their tribe and finding where they fit in. I’d like somewhere that I could bring children to and not feel like I’m spoiling things.”
Jenni Winter, Musical Director/Teacher
(focus group member)

Q: How easy/difficult is it to find spaces that Suit Your Budget?



- Very difficult 28.6%
- Difficult 25%
- Somewhat difficult 30.4%
- Neither easy nor difficult 8.9%
- Somewhat easy 5.4%
- Easy 1.8%
- Very easy 0%

“For small organisations, room hire costs come out of the facilitators pocket. It makes it very difficult to get something started and create art.”
Artist, musician and performer leading community groups

More deep-rooted frustrations were expressed. Here is a small selection.

“We host visual arts workshops, African drumming and Bollywood dancing. All we need is an empty space and some chairs. Accessibility, of course, and a welcoming space. The community we're working with feels they cannot have access because they are from different fringe areas.”

*Annalisa Buratti, Project Manager, Gem Arts
(Focus group member)*

“I find that venues are hard to get a hold of. They don't always reply about using their spaces and the ones that do have extortionate per hour charges, which only work if you have funding.”

*Theatre director & teacher working in
community and participation*

“I would really like to connect with others who work in the arts more often. Working from home is isolating. The ability to socialise as well as working in the same building is very appealing.”

Performer and facilitator

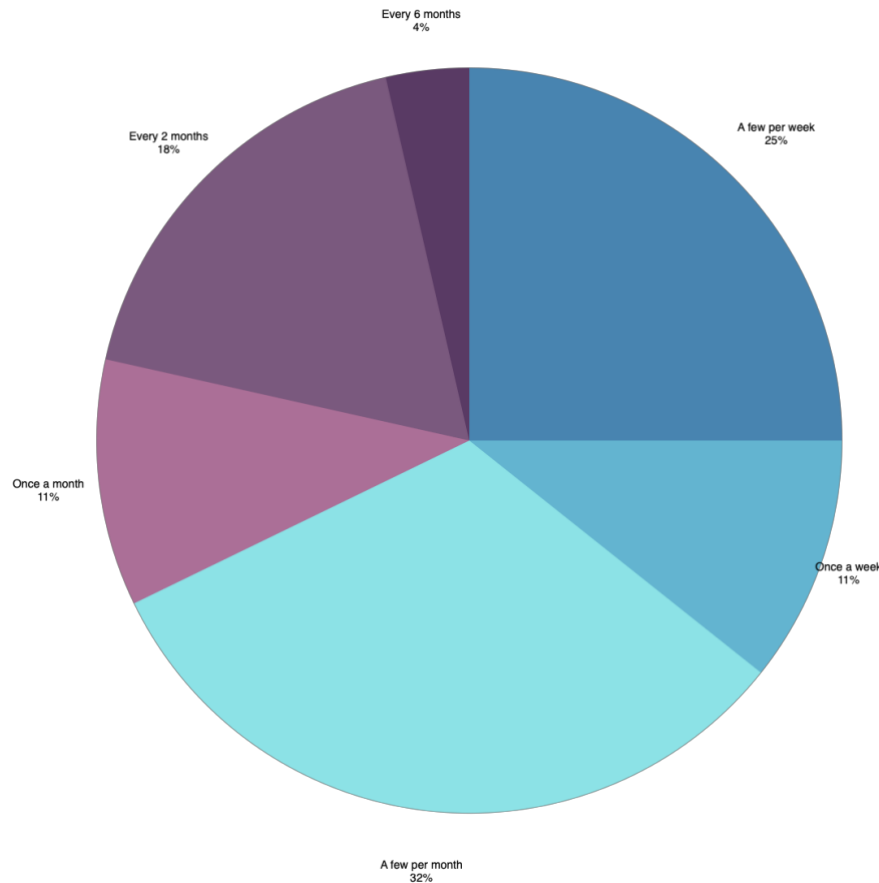
“Sub-standard creative spaces such as office lets, cold garage spaces or places without adequate facilities mean autistic people don't attend places they could otherwise grow and learn in.”

Multi-arts creative community practitioner

“We often need to book for rehearsal periods of up to 2 weeks. Theatre venues often negate on arrangements, and affordable spaces often double book, are noisy, or change availability of spaces at short notice.”

Leader of grassroots arts & wellbeing organisation

Audience 1A, Current Bookers / Booking frequency



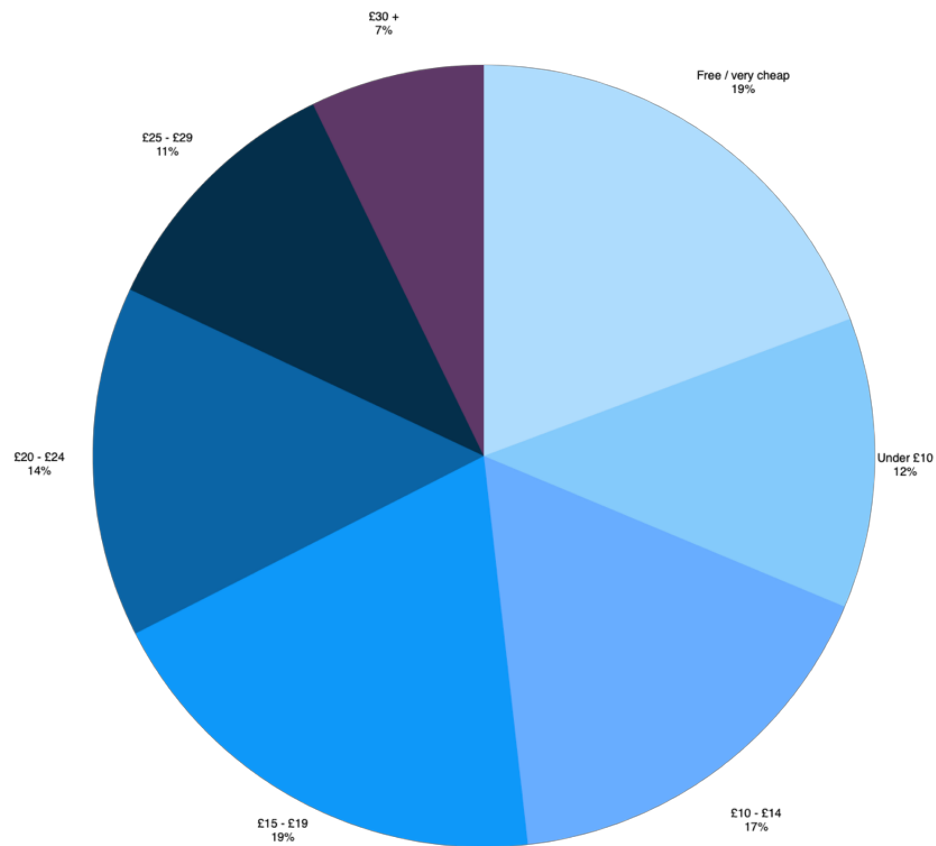
Q: How frequently do you need to book spaces at the moment?

- A few times per month 32.1%
- A few times per week 25%
- Once every two months 17.9%
- Once per week 10.7%
- Once per month 10.7%
- Every 6 months 3.6%

Most people need space regularly multiple times in any given month or week. The data suggests there is a demand for regularity and reliability.

“Everything is either very difficult to find or requires a long-term commitment which is no good for a short-term project.”
Project manager in theatre, music and performance

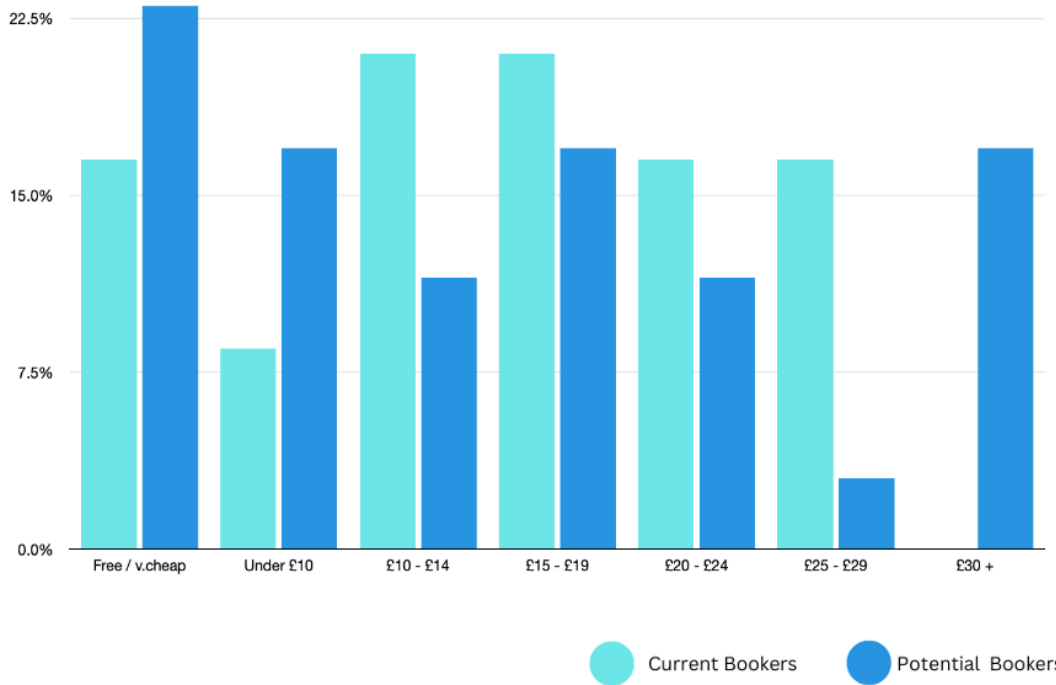
Audience 1, Bookers / Spending behaviours



Q: What is your typical budget when booking space?

- Free / Very cheap 19%
- Under £10 per hour 12%
- £10 to £14 per hour 17%
- £15 to £19 per hour 19%
- £20 to £24 per hour 14%
- £25 to £29 per hour 11%
- £30 or more per hour 7%

Audience 1, Current and Potential Bookers / Spending preferences



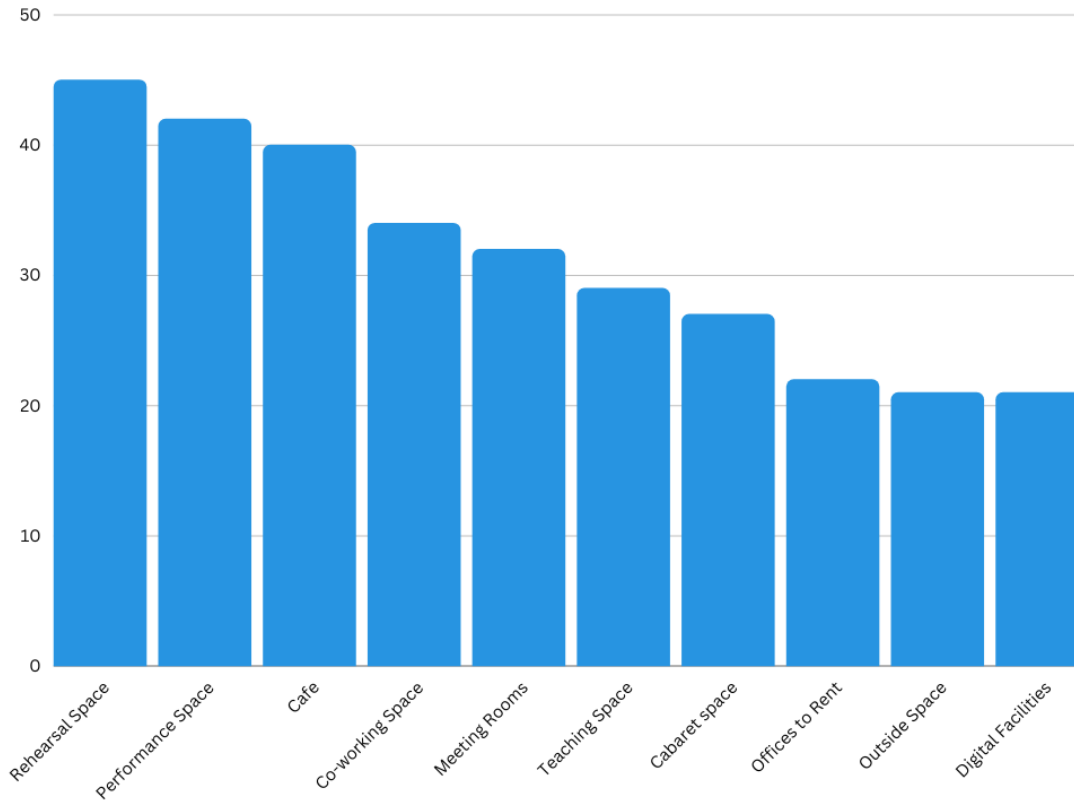
Breaking the data down further, lower-cost spaces came out more strongly as a preference with potential bookers.

To draw concrete financial conclusions is difficult, but we can be certain that affordability is essential. It is likely that an hourly rate over £19 per hour is unaffordable for a proportion of the target audience.

A sliding scale for hourly rates might be something to consider to balance both affordability for audiences and financial viability for Boho Arts.



Audience 1A, Current Bookers / Required Facilities



Current bookers are typically looking for creative spaces to rehearse, perform, gather and teach.

The facilities can be grouped into three categories:

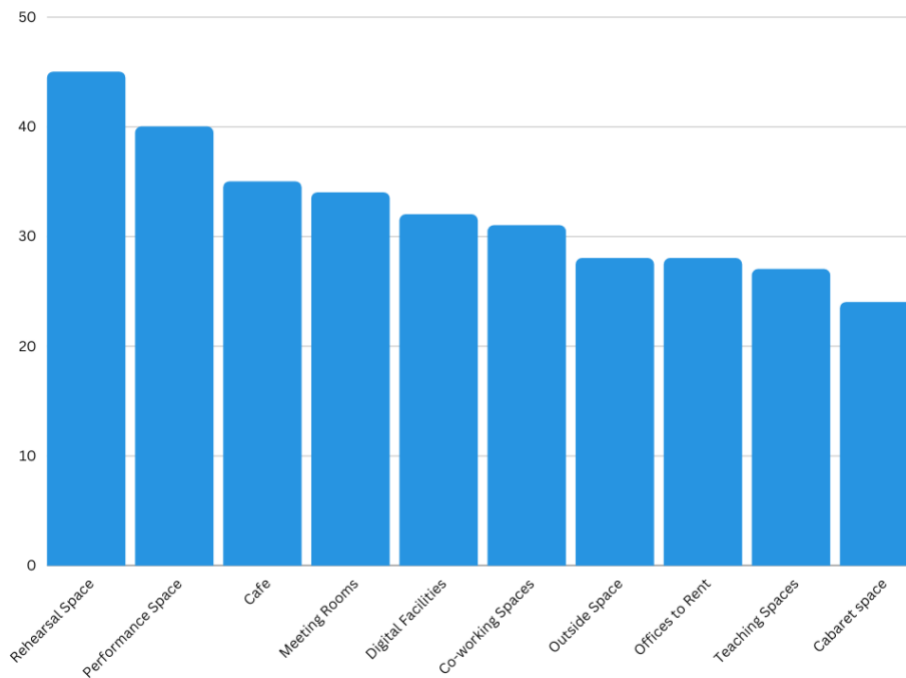
High value: rehearsal space, performance space, café

Medium value: co-working spaces, meeting rooms, teaching spaces, cabaret space.

Low value: offices for rent, outside space and digital facilities.

Audience 1B, Potential Bookers / Predicting future demand

45% of people said that although they don't currently book space, an offer such as the one presented by Boho Arts would mean they would be likely to want to book that space in the future.



The graph shows facilities of most importance to the segment of this audience who are not currently booking but would consider booking.

This potential audience values digital facilities more highly than current bookers and this could be a strong USP when trying to attract new bookers.

“Currently there are no affordable booking spaces unless for an arts council funded project. This puts people off creating work, putting on workshops, or even attempting projects that would need a space.”
Cross-arts, Creative Practitioner



Audience 1 / Who will book and why?

Based on best available data for the region, we have established an initial benchmark for the available market size in the initial stages of the Hub.

Arts and culture sector	2,450 ¹	We believe this is higher, but this is a verifiable figure from 2019 statistics
Creative industries	66,000 ²	We believe this is higher, but this is a verifiable figure from 2017 statistics
Charitable sector	38,250 ³	
Approximate market size	106,700	

¹ The economic value of arts and culture in the North of England, A report for Arts Council England July 2019

² Taking Part, the North East Creative Work Force Arts Council England, 2017

³ VODA Third Sector Trends in North East England 2020



Audience 1A, Current Bookers

This audience is currently booking space. Most are finding it very difficult to find centrally-located, affordable, and accessible spaces to meet their needs – this also includes difficulty in finding spaces that will or can accommodate children and young people.

Those 55% of people working in the cultural or creative sectors who say they have a need for and already seek to book space, are most likely looking for rehearsal, performance, teaching or collaborative spaces a few times per month.

This puts the potential target market for this audience at around 36,000 practitioners working or living in the North East region.

The research suggests this audience are most likely to be:

- A freelancer in the creative sector, perhaps a performer, teacher, artist or musician
- A leader of a small creative organisation or community group
- Working across a variety of artforms, with a focus on theatre, performance, community and participation, film, comedy or cabaret

Who are looking for:

- Accessible, well-located spaces
- Spaces that cater for the creative and collaborative nature of the sector
- Affordable spaces, between £14 - £19 per hour
- Spaces that can accommodate beneficiaries of all ages
- Rehearsal, performance, teaching, workshop or collaborative/creative workspaces
- Spaces that be booked for a variety of periods, respondents cited everything from 2 hours to weeks and months, however we can see two distinct groups, those who will book for 2-4 hours weekly or monthly, and those who may wish to book for a full week or two weeks quarterly or during school holidays
- A place to build a freelance community and get advice or support
- All audiences are keen that there is a good café!



Audience 1B, Potential Bookers

The main barrier for many of those who wish to book space but aren't doing so currently is affordability. Most of these potential bookers say they don't currently book space because it is unaffordable and poorly located for transport.

Those 45% of people working in the cultural or creative sectors who say they anticipate they would have a need to book space regularly, are most likely looking for rehearsal or performance spaces and meeting rooms. Notably these new bookers are more likely to prioritise Digital Facilities than the current bookers.

This puts the potential target market for this new audience at around a further 25,000 practitioners working or living in the North East region.

The research suggests this new audience are most likely to be:

- A freelancer in the creative sector, perhaps a performer, teacher or artist or someone who has an artistic hobby or passion.
- Working/interested in a variety of artforms, with a focus on theatre, performance, community and participation, film, arts and crafts, and wellbeing.

Who are looking for:

- Well-located spaces for public transport or nearby parking
- Free or very low-cost spaces – this came out more strongly in this group
- Spaces that are available through the week (Mon to Fri), all times of the day including evenings
- Rehearsal, performance, meeting or collaborative/creative workspaces, and digital facilities.
- Spaces that are safe and accommodate more niche activities – audiences mentioned stage combat, sexual health and wellbeing community groups, cosplay creation, pedagogy, voiceover, and breath work.
- Spaces that can accommodate beneficiaries of all ages
- All audiences want a place to build a community and get advice or support
- All audiences are keen that there is a good café!



Audience 1 / Summary

	Current bookers	Potential bookers
Market size	c.36,000	c.25,000
Most likely to be	Working in the creative industries as their main profession or source of income	Working part-time in the creative industries and/or with a passion for a creative hobby
Aged	25-34 years old (37%) / 55-64 years old (26%) 35-44 years old (19%)	35-44 years old (35%) / 45-54 years old (21%) 25-34 years old (19%)
Gender	Female (53%) / Male (28%) / Non binary (14%)	Female (52%) / Male (34%) / Trans Woman (3%) / Non-binary (2%)
Safety requirements*	Windows & Ventilation (73%) / Publicised cleaning regimen (70%) / Hand sanitiser (42%)	Windows & Ventilation (94%) / Publicised cleaning regimen (65%) / Hand sanitiser (41%)
Space requirements	Entire week and weekends, all times of day and evenings	Skewed Mon-Fri, all times of day and evenings
	Accessible for all people and communities neurodivergent, disabled	Safe and welcoming spaces for all kinds of communities
	Rehearsal, performance, teaching or collaborative spaces	Rehearsal, performance, collaborative, digital and tech available
Likely spend	£14 to £19 per hour	Uncertain, but 30% prefer to spend less than £10 per hour – this is unsustainable so marketing and communications to this audience will need to demonstrate value and benefits to overcome cost concerns.
Likely frequency	2-4 times per month	Unknown

*Suggest this may now be less of a concern to audiences given the landscape has changed since the research was conducted.

Audience 2

Attendees

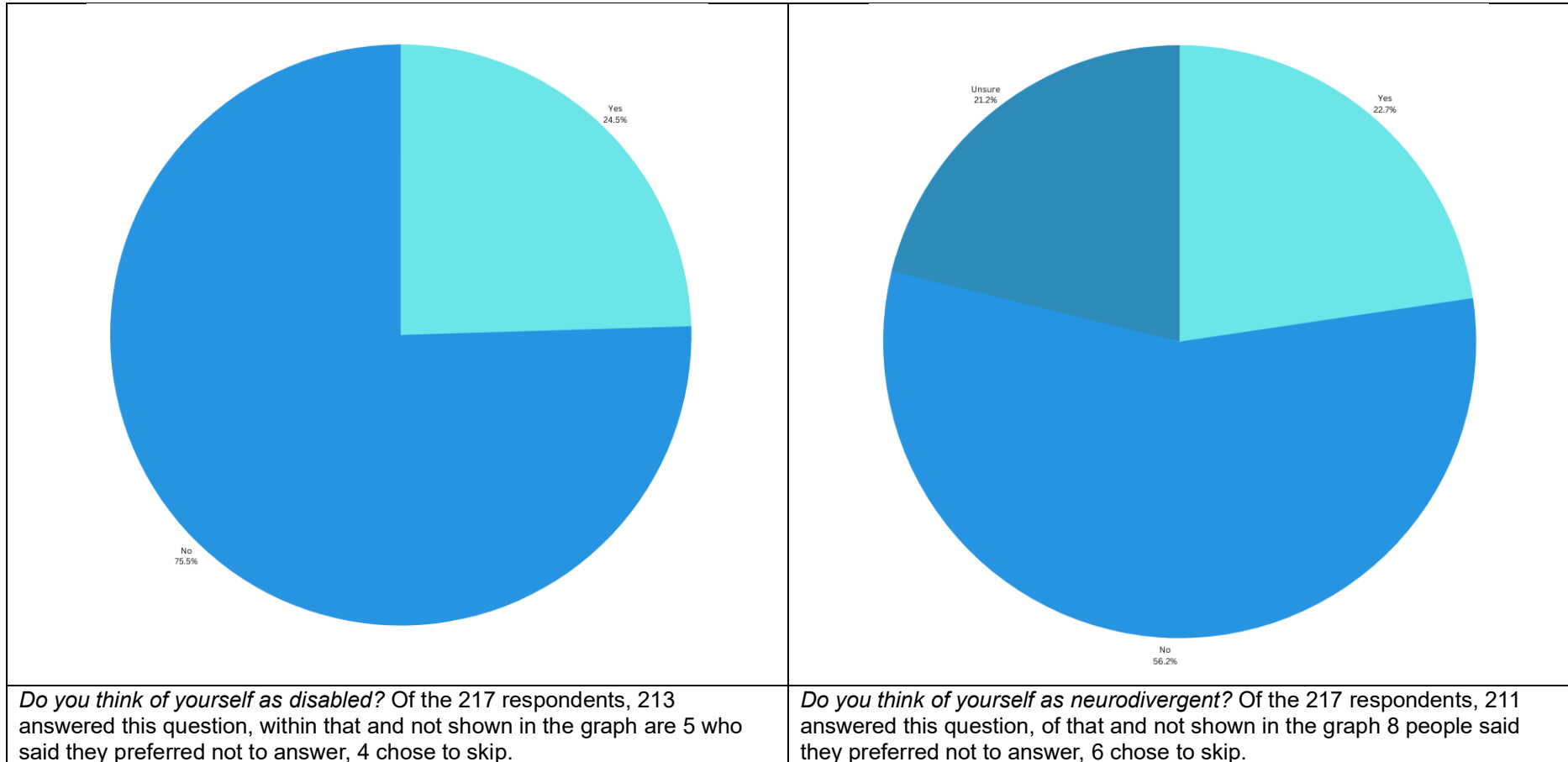


Audience 2, Attendees / Age, Gender & Ethnicity Demographics

<p>A pie chart illustrating the age distribution of attendees. The largest segment is 35-44 at 26.3%, followed by 45-54 at 20.7%, 25-34 at 23%, 55-64 at 13.6%, 18-24 at 7.5%, 65+ at 6.6%, and Under 18 at 2.3%.</p>	<p>A pie chart showing the gender of attendees. Women represent 61.1%, men represent 35.6%, and non-binary individuals represent 3.4%.</p>	<p>A pie chart displaying ethnicity data categorized into seven groups. Group 7 is the dominant category at 78.1%, followed by Group 6 at 14.2%. Groups 1, 2, 4, and 5 each represent 1.9%, while Group 2 represents 1.4%.</p>
<p>Of the 217 respondents, 214 answered this question, within that and not shown in the graph is 1 person who said they preferred not to answer, 3 chose to skip.</p>	<p>Of the 217 respondents, 214 answered this question, of that and not shown in the graph 5 people said they preferred not to answer, 3 chose to skip.</p>	<p>Of the 217 respondents, 214 answered this question, of that and not shown in the graph 4 people said they preferred not to answer, 3 chose to skip.</p>



Audience 2, Attendees / Disability & Neurodivergence Demographics

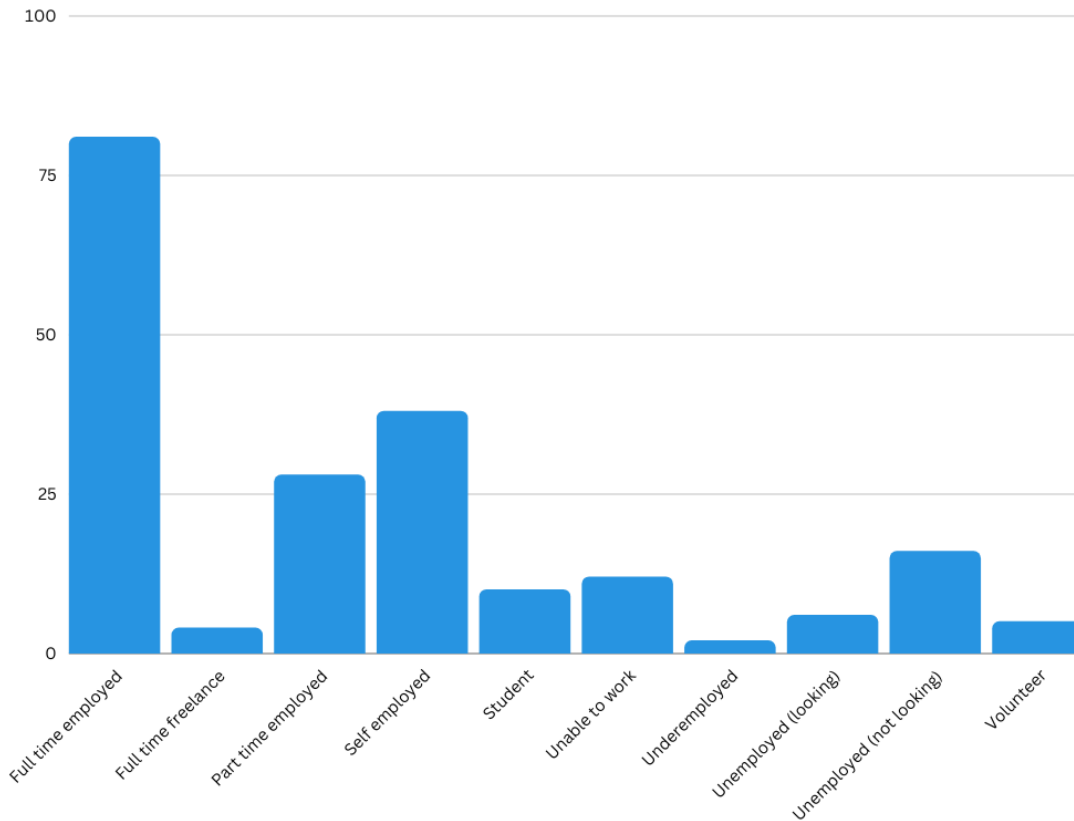




Audience 2, Attendees / Employment Status

Q: Which of the following best describes your current employment status?

Of the 217 respondents, 211 answered this question, within that and not shown in the graph are 9 who said they preferred not to answer, 6 chose to skip.



“Which of the following best describes your personal income in the last year?”

212 answered this question, and 5 chose to skip

£0	4
£1 to £9,999	36
£10,000 to £24,999	95
£25,000 to £49,999	49
£50,000 to £74,999	10
£75,000 to £99,999	2
Rather not say	16



Audience 2, Attendees / Personal Feelings

In the last six months, from April to September 2022

76% say they have felt **bored or unfulfilled always or sometimes**

72% say they have felt **insecure or uncertain always or sometimes**

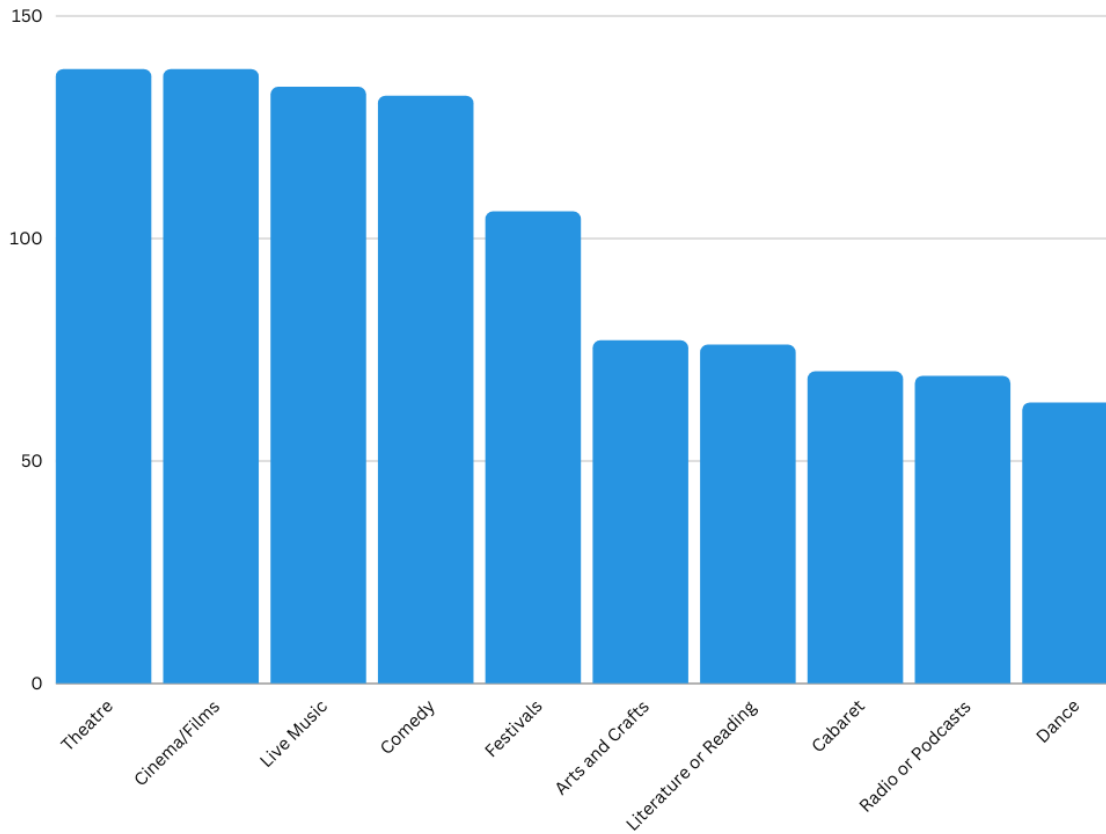
69% say they have felt **lonely or isolated always or sometimes**

68% say in the last they have felt **anxious or depressed always or sometimes**

70% say they feel **very or extremely concerned about the forecasted cost-of-living crisis.**



Audience 2, Attendees



Q: How interested are you in these artistic genres in general?



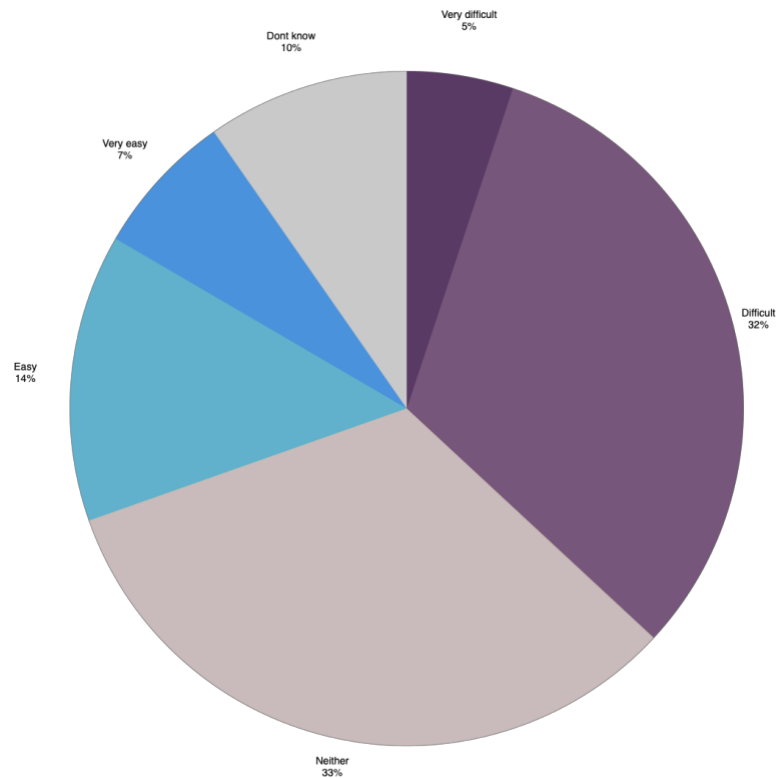
Audience 2, Attendees / We asked which of these ‘workshop activities’ they have participated in in their leisure time, and then which they would be interested in participating in in the future.

Type of Workshop Activity	Have attended	Interested in attending
Performing Arts - like Acting, Improv, Comedy, Movement, Singing, Choir, Cabaret	134	139
Writing - like Playwriting, Poetry, Spoken Word, Screenplay, Sketch-writing	98	126
Wellbeing - like Yoga, Mindfulness, Meditation	87	100
Common Interest – like Book Clubs, Film Clubs, Roleplay Clubs	54	96
Tech & Digital - like Filmmaking, Photography, Podcasting	48	96
Crafts - like Knitting, Rug making, Ceramics, Woodcutting	65	94
Therapeutic Groups - like Drama, Art, Music or Talking Therapy	59	81
Art - like Painting, Drawing, Sketching, Illustrating	74	79
Online or Hybrid Creative Workshops	55	73
Folk/Cultural - like Bhangra, Ceilidh, Hip hop	36	57
Personal Arts & Crafts - like Henna, Beading, Braiding, Jewellery Making	42	41
None of the above	40	11

Some went on to specify such interests as: Drag, Improv for Kids, Spoken Word Improv, Acting, Puppetry (making & performing), Horticulture, Recycling/Upcycling, Heritage & Local History, Storytelling, Poetry, Scratch nights, Artist Support Groups (Disabled, Neurodiverse, LGBTQIA etc), Languages, BSL, Music, Singing, Choir, Drumming & Percussion, Yoga, Meet-ups & Mixers, Wreath & Decoration Making, Mural & Street Art, Walking & Nature Tours

Audience 2, Attendees

Q: How easy/difficult is it to find activities you're interested in in Newcastle?

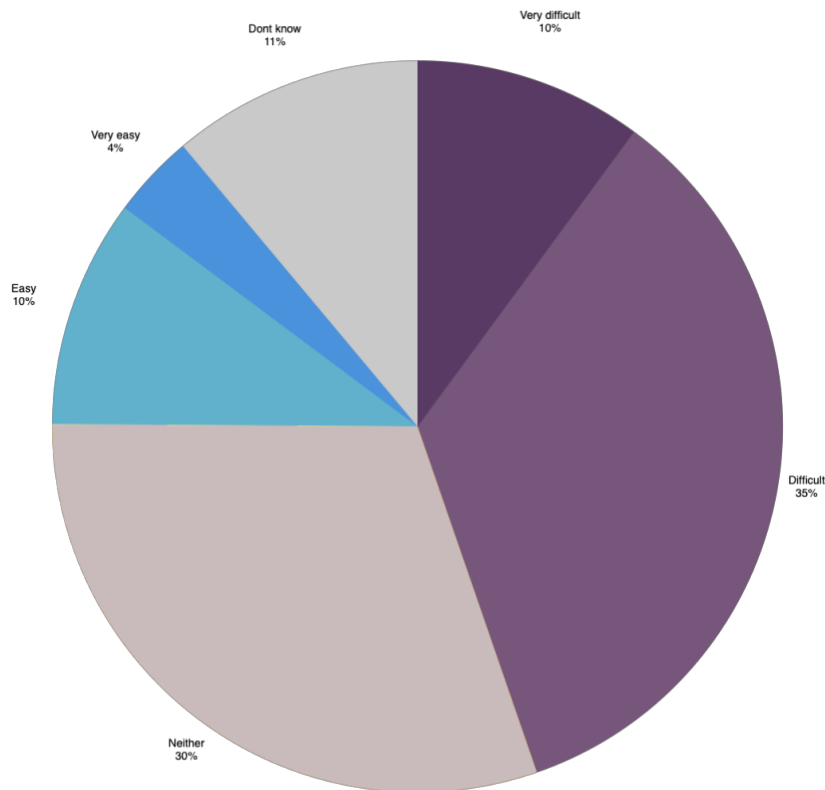


- Very difficult 5.1%
- Difficult 31.8%
- Neither easy nor difficult 32.7%
- Easy 13.8%
- Very easy 6.9%
- Don't know 9.7%

37% of people say it's difficult or very difficult to find activities that interest them in Newcastle.

Audience 2, Attendees

Q: How easy/difficult is it to find activities you're interested in that you can afford?

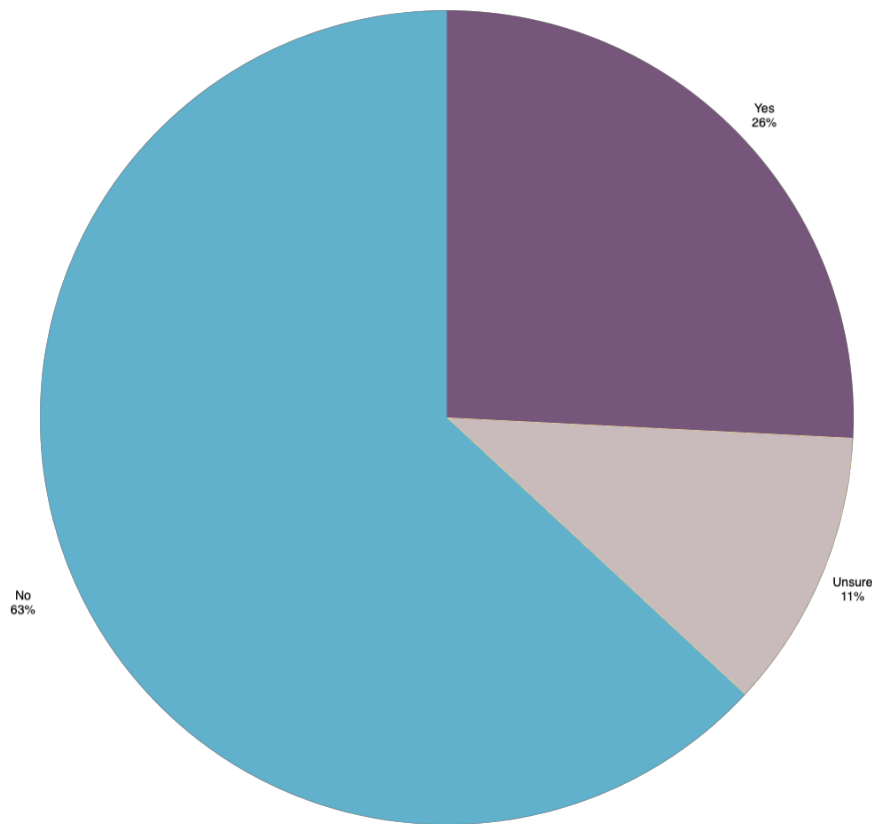


- Very difficult 10.1%
- Difficult 34.6%
- Neither easy nor difficult 30.4%
- Easy 10.1%
- Very easy 3.7%
- Don't know 11.1%

45% of people say it's difficult or very difficult to find activities they can afford in Newcastle.

Audience 2, Attendees

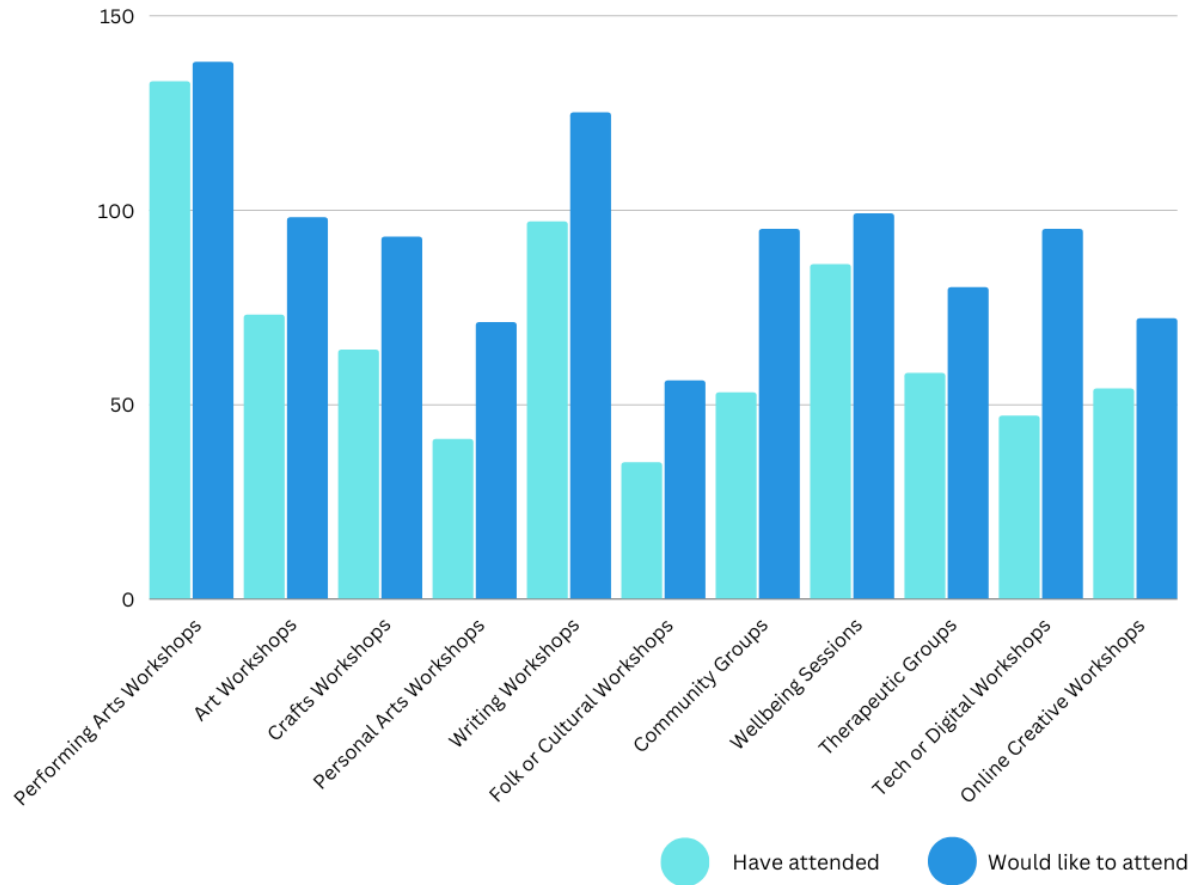
Q: Have you ever been unable to attend a cultural event in Newcastle because your access needs were not met?



- Yes 26%
- Unsure 11%
- No 63%

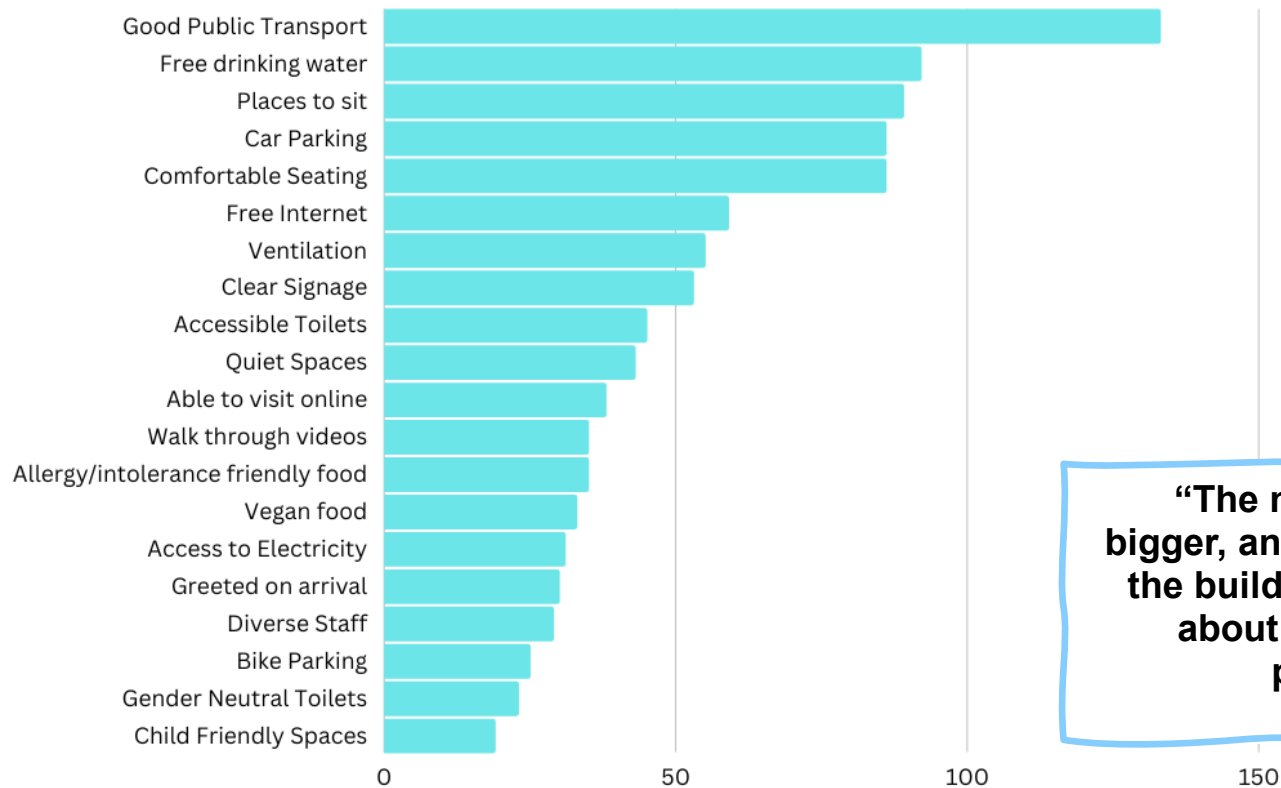
1 in 4 people say they have been unable to attend a cultural event in Newcastle because their access needs were not met.

Audience 2, Attendees / Behaviours



There is a 6.5% increase in people's willingness to attend events if they are affordable and centrally located.

Audience 2, Attendees / Physical access needs



Q: What access needs do you have to consider when visiting a cultural venue?

“The neurodiverse population is getting bigger, and we need to incorporate that into the building plans. Accessibility is not just about disability, or hidden disability, it's psychological barriers to spaces.”

Viv Wiggins – Tall Tales

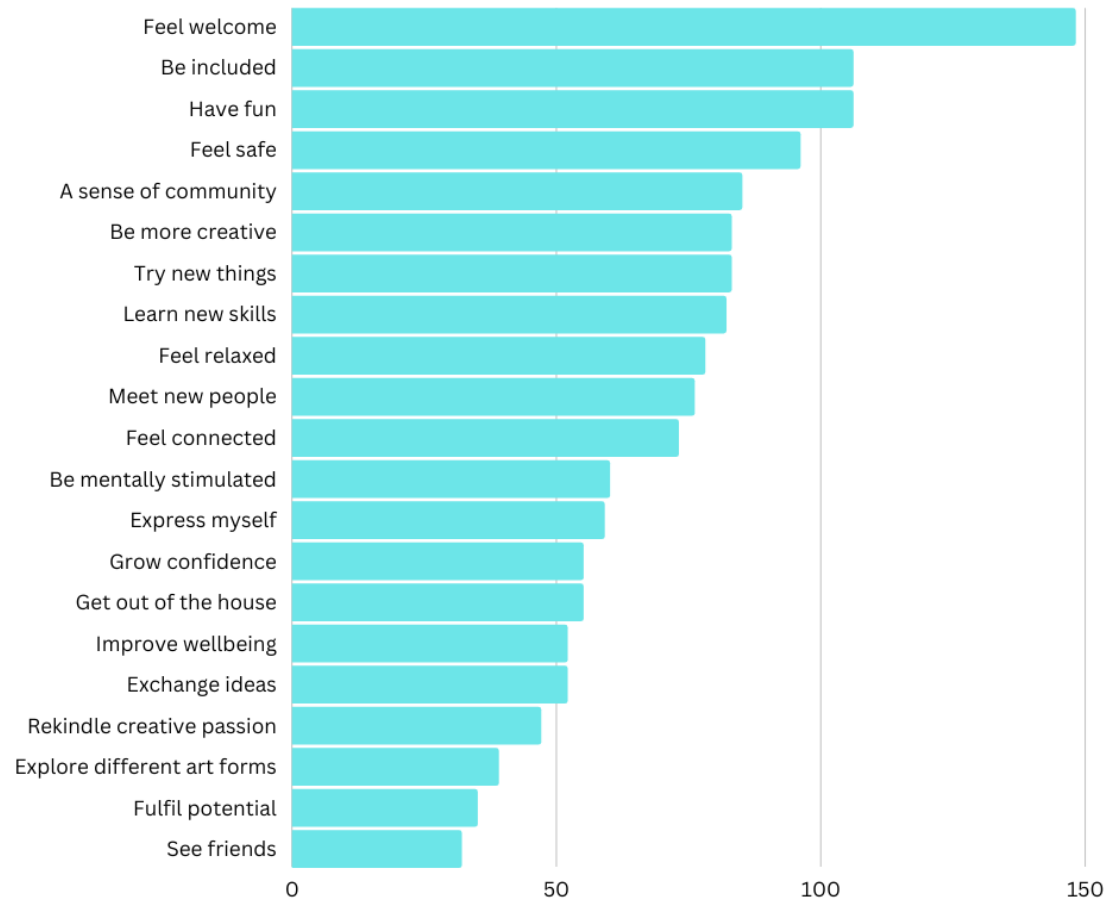
Top 20 only, see full list on next page.



Audience 2, Attendees / Physical access needs (full list)

Good Public Transport	133	Someone who greets you on arrival	30
Free drinking water	92	Diverse Staff	29
Places to sit	89	Bike Parking	25
Car Parking	86	Gender Neutral Toilets	23
Comfortable Seating	86	Child Friendly Spaces	19
Free Internet	59	Wheelchair or mobility-aid friendly spaces	18
Ventilation	55	Lifts	18
Clear Signage	53	Baby Changing Spaces	12
Accessible Toilets	45	Ramps	11
Quiet Spaces	43	Audio Loop	8
Able to visit or attend online or hybrid	38	BSL trained Staff	8
Walk through website videos to know what to expect in advance	35	Changing Places Toilets	6
Allergy/ intolerance friendly food	35	Multilingual staff	4
Vegan food	33	Brail Signage	3
Access to Electricity	31	Halal food	3

Audience 2, Attendees / Psychological needs



Q: What are the top five most important things you need from a creative arts hub?

“Safe is the big one. Safe and open. This should be for everyone and not just the select few usuals.”
25–34-year-old self-employed female



Audience 2, Attendees / Summary

Individuals who live in the North East who currently attend or are interested in attending creative events and activities, be that as part of their leisure time or as part of a hobby, or to enrich their artistic practice or profession.

This audience are seeking to attend cultural or creative events in and around Newcastle City Centre, though 36.9% say it is difficult or very difficult to find the events that interest them in Newcastle, and 44.7% say those events are unaffordable for them.

Accessibility seems to be less of an issue for this group, with just 1 in 10 people saying they had difficulties finding accessible events – though 1 in 4 said they were unable to attend a cultural venue due to accessibility needs going unmet.

24.5% of people said they considered themselves to have a disability which is significantly higher than the 17.7% figure for England.

Core areas of interest are theatre, films, music and comedy and the data suggests that if all their access needs were met by the Hub that they would visit frequently (60%) and attend new things, with performing arts and writing workshops being of most interest, followed closely by activities relating to wellbeing.

This audience wants to feel	This audience is influenced by	This audience is keen to
included, welcome, safe and part of a community.	good public transport, car parking, comfortable seating and refreshments.	try new things, learn new skills and have fun being creative.
This audience would like to find	This audience is most likely to spend	
events in Newcastle which are affordable.	up to £50 per month on creative leisure time activities, with £21-£50 being the majority.	