A feasibility study on a conference centre and concert hall for the Greater Norwich area

A report to

The Greater Norwich Development Partnership

By

TOURISMuk
FOR ANOTHER PERSPECTIVE

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Section 1 Executive Summary

Introduction

Tourism UK Ltd, in association with PMP Consulting, was commissioned by the Greater Norwich Development Partnership on the 23rd July 2008 to undertake an assessment of the *success factors of existing large scale facilities, the optimum mix of facilities to satisfy potential markets, the best locations taking into full account planning issues, the costs involved in developing and running such a facility, the potential income and other funding streams and the interdependencies of a concert hall and a conference centre.*

The approach taken comprised:

- Extensive desk based research relating to; the market for such facilities; the competitive environment; and trends within these markets
- Consultations with a range of stakeholders and partners
- Consultation with agents and operators
- The identification of the critical success factors necessary for the successful operation of conference centres and concert halls
- Consideration of a number of options within the context of the markets' expectations
- Consideration of planning issues and potential funding options.

The conference market

The conference and exhibition market is a diverse market ranging from small local meetings for a dozen people lasting just a day to major conventions attracting thousands of delegates from across the globe for a week or more. The market includes a number of segments including corporate events (often run by a company for its staff) and association events (including trade bodies, societies, membership organisations etc).

According to the British Conference Venue Survey (BCVS) 2007 there were approximately 1.37 million conferences held in the UK in 2006 a drop of 13% on the 2005 figure. Evidence suggests that conferences are becoming smaller in size; that quality of service is becoming an ever increasing priority for both corporate and association buyers; that lead in times for booking events is gradually reducing and that London, Birmingham and Manchester are still the top three cities used by conference organisers.

The United Kingdom Conference Market Survey (UKCMS) reports that the majority of conferences are for between 101 and 200 delegates. Other evidence suggests that the number of conferences held for over 1000 delegates is very small. The largest conferences come from the International Association sector. Competition in this market is global and in 2007 the UK was positioned 10th in a league table of 'meeting countries', with a market share of just over 3%.

Greater Norwich already attracts conference business and some limited latent demand is evident for facilities larger than are currently provided.

The conference buyers' expectations

The UKCMS identifies location, destination appeal and access among the key selection criteria of both corporate and association markets. Research into buyers' requirements suggests that in national and international, corporate and association conference markets a large scale conference centre in Greater Norwich would be competing with the SECC in Glasgow (for example), but perhaps more importantly Norwich would be competing with Glasgow as a destination. The brand strength of the destination in the larger conference market is a key determinant in buyer selection.

The success factors of large scale conference centres

The UKCMS report states that city centre hotels are the most frequently used venues as can be seen in the table below. A comparison of city centre hotels versus out of town hotels shows the preference for centrally located facilities.

	Association	Corporate
City centre hotel	62%	73%
Convention centre	36%	28%
University/academic	28%	25%
Unusual venue	19%	18%
Out of town hotel	15%	21%

Analysis of large scale conference centres across the UK suggests that the following factors are critical to success (the extent to which each element is critical depends on the specific market, e.g. brand image is more important to the association market than the corporate market):

- Destination brand image - the appeal of the destination to delegates
- Access – how easy is it for my delegates to get to the venue
- Market experience – skills in bidding for and hosting large events
- Supporting Infrastructure – bars, restaurants, accommodation
- Subvention – financial support for larger events to persuade them to choose the destination
- City location – to attract large association markets and corporate events proximity to a major city is required
- Sense of place - in some markets (particularly large association events) venues and destinations that offer a sense of place are more attractive

To be successful in attracting a range of markets a large scale venue will need to be able to demonstrate a strong match with the attributes identified above.

The conference product in Greater Norwich

The conference venue product across Greater Norwich is limited in size; whilst there are many venues most have a capacity of less than 300. In addition conference organisers generally require nearby hotel accommodation with a minimum 3 – 4 star rating from an accredited rating organisation (e.g. Visit Britain, AA or RAC) and often they require a 5 star hotel for key guests and speakers. Analysis of the serviced accommodation in Greater Norwich shows that the only 4 star hotel accommodation is to be found outside the city centre and that no 5 star accommodation exists.

Furthermore, current road and rail access from the West and North of England is likely to be considered a weakness by many buyers.

Notwithstanding, Norwich has some real strengths. A heritage city with a strong retail offer could be attractive to certain conference markets. Organisations with an interest in heritage, tourism or retail could find Norwich an appealing destination where delegates can attend a conference in a historic setting.

The concert hall market

The arts and cultural market is a fragmented industry, with large numbers of multi-purpose venues. This situation is compounded by, in many cases, the historic ability and willingness of music performers to adapt to non-bespoke performance spaces.

An insight into potential projected demand can be developed through analysing the interaction between catchment, competition and product. By their very nature, in many cases these three factors are intrinsically linked and inter-dependent.

Norwich presently has a relatively wide range of venues across different types and of different capacities and attributes.

The market for concert halls is usually measured by an assessment of population densities within a certain drive time of the venue. The industry regards 30 minutes to be the maximum journey time that the majority of attendees or visitors will travel by car to most arts events. Analysis of 2001 Census data shows that 344,063 people living within a 30-minute drivetime catchment of Norwich.

Analysis has also illustrated that the Greater Norwich catchment does not exhibit characteristics that suggest an overwhelming case for the delivery of additional concert hall provision. Classical music (the genre with demand most exceeding the national average) and pop/rock are the two genres for which there appears to be greatest demand.

Capital and revenue costs

Evidence of large scale conference centres across the UK shows that such venues are often built using economic regeneration arguments thus enabling them to access large pots of public sector and European funding. The costs of a new build facility can range from £35 million to as much as £250 million depending on the size and design of the project. Globally, conference centres tend not to make a commercial return and a significant number of them are funded by public sector funds in consideration of the economic impact that they return. Revenue costs for such facilities can also run into millions of pounds per year.

Market opportunity

Analysis of existing conference supply and demand suggests that an opportunity exists within the 350 delegate to 800 delegate conference market. A venue that could accommodate up to 800 in a single auditorium would be able to accommodate all but the largest of conferences and would satisfy most latent demand.

Furthermore a combined facility incorporating conference facilities and an events space might attract 15-20 additional concert event days as a complement to wider event/conferencing programme, filling an identified gap for an additional venue with seating capacity between c.300 and 800.

Such a venue would need to be built within easy reach of the city centre for the cultural programme to be successful; nearby restaurants and bars forming an integral part of the experience. Furthermore a city centre location would enable the destination to attract conferences through its heritage and retail strengths. As stated earlier, for many conference buyers the setting for the event is a key consideration. Those wishing to organise a tourism or heritage conference are more likely to consider Norwich if the event can be held in an historic environment. Those organising a retail conference might prefer a venue close to a significant retail environment. It is these strengths that will give Norwich a competitive advantage over out of town conference centres.

If the identified gap in conference facilities and the lack of 4 and 5 star hotel accommodation can be resolved then Greater Norwich could attract additional conferences to the area, particularly those where the conference theme has some connection to the strengths of the destination.

Conclusion

Market analysis, discussion with key local stakeholders and consultation with buyers and promoters suggests that there is insufficient demand to merit the delivery of a new large scale bespoke conference centre and concert venue.

Such a facility would require significant capital funding and demand would not be sufficient to create a return on investment. However there is certainly scope to attract additional regional and national conferences to the area by improving the existing offer. It is recommended therefore that the optimum solution to meet the markets needs would be a medium scale mixed use facility designed to capture the conference market for up to 800 delegates and to extend the current cultural programme. Ideally such a development would be city centre based and would make use of an existing resource.

The next stage of the process we believe requires a more detailed analysis of this option with a full business plan being developed. This plan should include a detailed specification of the facilities to be included along with a recommended approach to marketing and management of the venue. The quality of the experience will be critical to its success and hence arrangements for operational management will need to be considered carefully.

Section 2 Introduction

Background

2.1 Tourism UK Ltd in association with PMP Consulting was commissioned by the Greater Norwich Development Partnership on the 23rd July 2008 to undertake an assessment of the *success factors of existing large scale facilities, the optimum mix of facilities to satisfy potential markets, the best locations taking into full account planning issues, the costs involved in developing and running such a facility, the potential income and other funding streams and the interdependencies of a concert hall and a conference centre.*

2.2 Tourism UK's terms of reference were, to provide a scoping study to identify a range of options (looking at location, scale, new build versus adaptation or extension of an existing facility) along with indicative costs. The brief stated that the report should help the client group to home in on one or two preferred options which a further study might explore in more detail.

2.3 The approach taken comprised:

- Extensive desk based research relating to; the market for such facilities; the competitive environment; and trends within these markets
- Consultations with a range of stakeholders and partners
- Consultation with agents and operators
- The identification of the critical success factors necessary for the successful operation of conference centres and concert halls
- Consideration of a number of options within the context of the markets' expectations
- Consideration of planning issues and potential funding options

This report sets out the findings of the study and provides an evidence based context for decision making on the development of such facilities in the future.

Strategic context

2.4 Greater Norwich is a rapidly growing area awarded Growth Point status by government in October 2006. Greater Norwich is the largest labour market in the East of England and the fifth most popular retail centre in England. The draft regional economic strategy for the East of England identifies Greater Norwich as one of the seven "engines of growth" for the region. The vision for the strategy clearly expresses the region's direction of travel – the East of England, by 2031, wants to be known as:

'An ideas driven region, that is internationally competitive, harnesses the talent of all and is at the forefront of the low carbon economy'.

2.5 Culture, heritage and leisure are recognised as being highly significant in the commercial life of the East of England. The arts, creative and tourism sectors are all growing rapidly in the region. Supported by national and regional research, the heritage tourism and leisure industry is identified as one of the 14 key priority sectors for the East of England.

2.6 The Regional Economic Strategy, (draft strategy for consultation, September 2007) highlights for Greater Norwich a number of headline ambitions including, to;

- Strengthen Norwich as a leading, medium-sized science city in the UK
- Develop Norwich as a nationally important centre in financial and business services and creative industries, and maintain Norwich as a top ten retail centre
- Develop Norwich as an international exemplar low-carbon city
- Improve the connectivity of Norwich to key national, regional and local markets through infrastructure improvements to key roads and enhanced rail services to London and other regional cities
- Increase linkages between Norwich international Airport, Amsterdam Schipol as a European hub, and other key international markets
- A nationally recognised heritage and arts offer, and regionally important retail and leisure functions

2.7 The RES (draft consultation September 2007) prioritises for 2008-2031:

- Strong and Cohesive Communities that promote cultural and sporting activities to build social capital

- A Network of Cultural Centres of Excellence of national and international significance
- Increased economic gain from the region's cultural and natural assets

2.8 Plans for the Greater Norwich area within the context of the Regional Spatial Strategy include an additional 37,500 new dwellings and 35,000 additional jobs between 2001 and 2021, with further growth of at least 10,000 further dwellings between 2021 and 2026[i].

2.9 This growth will create new business and residential communities requiring new and improved infrastructure.

2.10 Whilst demand for a conference centre is not driven by population size, such a facility has some commonalities with a concert hall and hence this study also considers the need for enhanced facilities within this context. A new conference centre could also create a significant economic impact and could enhance the image of the area as a leading business and cultural destination thus fitting with the ambitions set out in the RES.

[i] Greater Norwich Employment Growth and Sites & Premises Study

Section 3: The Conference and Exhibition Market

The following key points have been developed through analysis of existing market reports; and consultations with stakeholders and partners.

The Conference and Exhibition Market

3.1 The conference and exhibition market is a diverse market ranging from small local meetings for a dozen people lasting just a day to major conventions attracting thousands of delegates from across the globe for a week or more. Both the British Conference Venue Survey (BCVS) and the United Kingdom Conference Market Survey (UKCMS) define a conference event as one that involves a minimum of 8 people occupying a venue for at least 4 hours' duration.

3.2 Buyers of conferences are usually described as corporate, association or public sector buyers. The UKCMS combines the public sector with other not for profit organisations under the banner of association buyers; for the purposes of this report we too have used this definition. The needs and buying behaviours vary across these market segments as they do across different sizes of events.

3.3 Key features of these market segments are:

- Corporate buyers are private sector companies. They represent the largest buyers of conference space (if measured by volume of events) and use these conferences for a wide range of purposes including training events, sales meetings, annual general meetings, product launches etc. Many organisations have meeting rooms within their own offices but these are often limited in size and for this reason, among others, they need to buy conference space off site.

- Association buyers are diverse including trade bodies, societies, membership organisations and as stated earlier the public sector. Delegates for these events can be regional, national or international depending on the type of association and the extent of its membership. Associations' events can be peripatetic, with organisers rotating locations to attract the biggest possible attendance from their membership. It is these events that many destinations aim to attract due their large size and related economic impact.

The conference market; size, characteristics and trends

3.4 The conference market across the UK is considered to be relatively buoyant, though growth is generally in line with economic conditions and hence concerns exist that the current downturn in the economy will have an impact on demand. Concerns over a levelling off of demand do not seem to have dampened the development of new facilities with a number of new developments having taken place in recent years (appendix 2).

3.5 According to the British Conference Venue Survey (BCVS) 2007 there were approximately 1.37 million conferences held in the UK in 2006. This represents a drop of 13% on the 2005 figure and is broadly comparable to the figure in 2003, though the survey is based on a limited sample of venues and hence such results should be treated with caution.

3.6 The following trends in the conference market are noted:

- Evidence suggests that conferences are becoming smaller in size.
- Quality of service is becoming an ever increasing priority for both corporate and association buyers
- Lead in times for booking events is gradually reducing
- London, Birmingham and Manchester are still the top three cities used by both association and corporate conference buyers
- 40% of associations organised an exhibition along side their conference on 2006; this figure is significantly higher than in the previous year.

3.7 The UK Conference Market Survey (UKCMS) for 2007 reports that the majority of conferences are for between 101 and 200 delegates. It states that 26% of Association Conferences are for delegates of between 101 and 200 in number and the majority of corporate events held in 2006 were for less than 100 delegates.

Size of event	% of organisers
Less than 50	19
5 0 – 100	25
101 – 250	22
251 – 500	16
501 – 999	10
1000+	8

Table 1: % of organisers arranging events - by size

As can be seen from the above survey of conference event organisers, over two thirds arranged events with less than 250 delegates and less than 1 in five organised events for more than 500 delegates.

The International association conference market

3.8 Larger events, as previously mentioned, tend to come from the association sector, the largest events coming from international associations. The Union of International Associations has for the past 59 years undertaken statistical studies on the preceding year's meetings. The research undertaken considers meetings included in the International Congress Calendar and national meetings where the ratio of foreign participants exceeds 40%. In 2007 the research showed that the USA topped the league table of international meeting countries with the UK sitting in 10th position with 3.17% market share.

3.9 In terms of *'meeting cities'* Singapore topped the league table followed by Paris, Vienna and Brussels. No British destinations were listed in the top ten international meeting cities reflecting the global competitive environment.

The UK market supply

3.10 A number of sources of information on conference and exhibition venues exist including, Visit Britain, the BACD, and the Association of Event Venues and the conference Green and Blue books. Unfortunately the format used for the databases held by these organisations does not facilitate an assessment of supply directly relevant to Greater Norwich. Visit Britain allows a venue search by type of venue, options for which include 'Purpose Built Conference/Exhibition Centres or Unique Venues. However the definition of these categories appears very broad. A search through the entire database of venues using the capacity filter produces the following results:

Results from Visit Britain's venue searching tool.			
Search Categories	Venues meeting capacity search requirements by type		
Meeting capacity	Unique Venues (listed under other venues)	Purpose Built Conf/Exhibition Centre	All venue types
200 – 499	485	317	1990
500 – 999	265	179	635
1000+	132	86	265

Table 2: National supply analysis – Tourism UK Ltd

3.11 As can be seen from the above table the majority of purpose built conference centres have a capacity of less than 500 and nationally only 86 have a capacity of more than 1000. These numbers would fall even further if we were to include a filter on venues that can also accommodate the maximum number of delegates for a sit down meal. According to the British Conference Venue Survey an estimated 3500 conference venues operate across the UK. The survey admits, however, that defining the scale of the conference venue universe is problematic and hence this estimate might be inaccurate.

3.12 Competition in the conference and exhibitions market is fierce and becoming stronger through continual additions to product and the development of conference bureaux and bidding units. In international markets destinations such as Singapore, with its Suntec International Convention and Exhibition Centre and Dubai with its International Convention and Exhibition Centre and Convention Tower, position themselves as international convention destinations in an attempt to capture market share.

3.13 In the UK market recent additions include the new arena in Liverpool which includes a purpose built exhibition and conference centre with a main auditorium capacity of 1,350 and exhibition space of 7,000 sqm. In addition developments are planned at Harrogate, at Excel in London and the NEC in Birmingham has announced a £90 million plan to add an entertainment complex including additional conference facilities and hotel accommodation.

The exhibition market; size characteristics and trends

3.14 An exhibition primarily creates an opportunity for buyers and sellers to meet. Exhibitions might be trade events, where wholesalers and retailers meet, often within a particular sector, e.g. clothing; or public/consumer events where suppliers show their wares direct to potential buyers, examples include the National Boat Caravan & Outdoor Show, and the British International Motor Show. In the case of the latter an admission is often charged. Public events are not always high profile events, in fact, according to the UK Exhibitions Facts, almost 60% of events held were antique/craft fairs.

3.15 In 2005 KPMG undertook an assessment of the economic impact of the exhibitions sector. The study found that:

- An estimated 1,800 exhibitions are held annually in the UK
- Over 17 million visitors attend UK exhibitions each year
- Nearly 270,000 exhibitors attend UK exhibitions each year

- Approximately 7% of visitors and 13% of exhibitors to UK exhibitions are from overseas
- The total annual expenditure generated from UK exhibition activity is £9.3 billion
- UK exhibitions support an estimated 137,000 FTE jobs
- The average number of visitors per exhibition was 9,700 (2004/2005)

3.16 The UK Exhibitions Facts (ii) Volume 18 shows that in 2005 the median exhibition size was 4000m² - there were, therefore, as many exhibitions booked requiring less than 4000m² as there were requiring more. The most frequently reported exhibition size (mode) was 2000 – 2999 m² with 176 (18%) of the 944 exhibitions reported occupying this amount of space. Of the 944 events recorded (2005) 65% required 5,000 m² or less of hall space. In 2005 there were 47 UK venues offering more than 2000m² of exhibition space and 29 offering more than 3,000m². The table below shows the location of these venues.

Venue	Location	Largest Hall m²	Total Space m²
ExCel	London	32,500	65,000
The NEC	Birmingham	24,870	201,365
Earls Court	London	23,226	65,394
SECC	Glasgow	10,065	22,355
Olympia	London	9,895	35,905
G-Mex	Manchester	7,500	12,200
Aberdeen Exhibition Centre	Aberdeen	7,300	9,306
Alexandra Palace	London	6,558	11,754
Ricoh Arena	Coventry	6,000	6,000
Royal Highland Centre	Edinburgh	5,800	6,965
Three Counties Showground	Malvern	5,623	10,568
Irish ICEC	Dublin	4,717	19,786
The King's Hall	Belfast	4,645	9,306
Westpoint Exhibition Centre	Exeter	4,590	4,590
Stoneleigh Park	Coventry	4,536	20,703
Harrogate International	Harrogate	4,500	16,500
Donington Exhibition Centre	Derby	4,405	4,405
East of England Showground	Peterborough	4,300	7,700
Barbican Exhibition Centre	London	4,103	7,916
Cardiff International Arena	Cardiff	4,068	5,026
Metro Radio Arena	Newcastle	3,960	3,960
Liverpool Arena	Liverpool	3,725	7,000
Odyssey Arena	Belfast	3,685	3,685
Telford International Centre	Telford	3,675	11,650
Yorkshire Event Centre	Harrogate	3,422	7,423
Winter Gardens	Blackpool	3,230	7,249
Grosvenor House	London	3,081	4,054
The ICC	Birmingham	3,000	3,000
Kent Event and Ex. Centre	Maidstone	3,000	7,099

Table 3: UK exhibition halls - source: UK exhibition facts volume 18

3.17 The Norfolk Showground would fall just outside this list of venues offering just less than 2,800m² in its main exhibition hall.

[ii] Association of Exhibition Venues

The UK buyers expectations

3.18 Conference buyers' decisions are, according to the UK Conference Market Survey, primarily driven by location and the destination brand. The main factors influencing destination and venue selection are shown in table 3 below. As can be seen, for association and corporate conference buyers, location is the first criterion to influence the decision making process.

3.19 This means that for any international or national event the destination brand must be attractive enough to position it within the buyers evoked set of destination options. Whilst a distinguishable venue such as a purpose built facility will play an important role in helping to differentiate the destination from the competition, it is only one factor and in the association market could be far less important than the destination brand.

Ranking	Selection criteria for association buyers	Selection criteria for corporate buyers
1	Location/Destination	Location/area of country
2	Price/value for money	Price/value for money
3	Access: road, rail, air links	Access: road, rail, air links
4	Availability	Quality of service
5	Quality of service	Capacity of conference facilities
6	Capacity of conference facilities	Availability
7	Quality of food	Quality of food
8	Quality of conference facilities	Reputation of venue
9	Previous experience of venue	Quality of conference facilities
10	Quality of bedrooms	Previous experience of venue

Table 4: Selection criteria - Source: UK Conference Market Survey 2007

3.20 This hierarchy of decision making means that in national and international, corporate and association conference markets a large scale conference centre in Greater Norwich would be competing, not just against the SECC or the Glasgow Royal Concert Hall (for example), but against Glasgow as a destination. The buyer will look at the entire offer including the accommodation, the appeal of the city to delegates, the proximity of the venue to the accommodation and to the cultural infrastructure, the quality of any possible social programme and the price and will make the decision based on the whole package on offer.

3.21 In the high end association conference market the organiser needs a destination that is appealing to the delegates. In most cases the delegates will be paying a delegate fee, overnight accommodation costs, travel costs and expenses during their stay; to persuade delegates to commit to this expenditure the organiser needs to combine a good conference programme, high profile speakers and an appealing destination. The conference organiser hopes that the chosen destination will add value to the conference experience, perhaps encouraging delegates to consider attending the conference as an opportunity to visit the destination. In this case, whilst location in relation to the delegates is important, it is perhaps not as significant as the appeal of the destination.

3.22 A destinations' performance in this market can also be linked to the local university's areas of specialism. Association conferences are often attracted to a destination through an ambassador programme linked to the university. Through such programmes the conference bureau conducts research to identify those associations holding peripatetic conferences that could be attracted to the destination. The conference bureau then seeks to cultivate a relationship with a local member of the association in an attempt to help this 'ambassador' bring the conference to the destination. The larger and higher profile the university the greater the potential for this marketing approach to succeed.

3.23 In corporate conference markets the organiser is likely to be 'demanding' attendance rather than inviting it. Consequently, whilst a strong destination image might be desirable, it is much less important. In this market location actually means access. If the organiser needs his 200 sales managers to attend a conference his concern will be more about which location is most convenient or cost effective for the company. In this market therefore good road, rail and air access can be very influencing.

3.24 In both cases however a city centre location can also be important. The proximity of venue, accommodation and cultural infrastructure can provide a destination with a key competitive advantage. When looking at the type of venue most frequently used by organisers, the UK Conference Market Survey (UKCMS) found that 62% of association events were held in city centre hotels and that the increasing trend towards centrally located purpose built spaces was echoed by the corporate sector with 73% choosing a venue with a central location.

Venue Performance

3.25 The BCVS (British Conference Venue Survey) shows an average of 392 conferences per venue; however this performance measure includes many small meetings held in venues with multiple small rooms. According to the BCVS 61% of all conferences were held in hotels and only 2% were held in purpose built centres. The UK Conference Market Survey 2007(UKCMS) found that 62% of Association events and 73% of corporate events were held in city centre hotels with 36% and 28% respectively using a purpose built convention centre(it should be noted that the definition of purpose built centre as used by BCVS and purpose built convention centre as used by UKCMS may differ). According to the UKCMS the tendency to use a purpose built centre had increased from 27% in the previous year.

3.26 Research into the performance of purpose built UK conference centres suggests that such centres host an average of 279 conferences per year. The Edinburgh International Conference Centre (EICC) achieved an average of 180 conference events per year over its first 10 years of trading. It has a 1200 capacity auditorium and 2000 sq m of exhibition space which can host banqueting for 850 people. The NEC hosts over 180 events per year and Excel boasts that in its first five years of trading it hosted 1700 events (conferences and exhibitions). The Sage Gateshead though not a purpose built conference centre, (its core function being a concert hall), still hosts over 100 conferences per year.

Key Points:

- The conference market is buoyant though national economic confidence may have an impact on demand
- The BCVS suggests that 1.37 million conferences were held in the UK in 2006
- Competition for larger events is becoming stronger with new facilities being created and subvention funds becoming more necessary to win bids
- Across the UK there are estimated to be around 600 purpose built conference centres 265 of which can accommodate more than 500 delegates
- Buyers in the association conference market require strong destination brands with facilities in or near to the city centre
- 40% of association conferences require exhibition space
- Proximity to large catchments is key to the success of public exhibitions
- In the corporate markets location and access are key influencers

Section 4 Concert Hall Market

Introduction

4.1 The arts and cultural market is a fragmented industry, with large numbers of multi-purpose venues. This situation is compounded by, in many cases, the historic ability and willingness of music performers to adapt to non-bespoke performance spaces.

4.2 Until recent years, this situation has meant that informed market assessments could not be carried out due to an absence of coordinated data collection. This gap in information has been partly addressed by a number of population surveys commissioned by Arts Council England (ACE), although significant gaps still remain.

4.3 In the market appraisal undertaken for this study this research has been supplemented by consultation with, among others, venue managers and event promoters to gain a rounded market perspective of the Greater Norwich area and its ability to host and sustain an extended concert events programme.

4.4 This information is key for strategic planning and the encouragement of investment since the commercial arts can only flow where the paying public, or at least subvention or benefactor budget, allows. The GNDP has suggested that, in this instance, there is unlikely to be any significant additional revenue subsidy for the facility.

4.5 An insight into potential projected demand can be developed through analysing the interaction between catchment, competition and product. By their very nature, these three factors are intrinsically linked and inter-dependent in many cases.

Figure 2.1 below shows the interaction between these three determinants of demand.

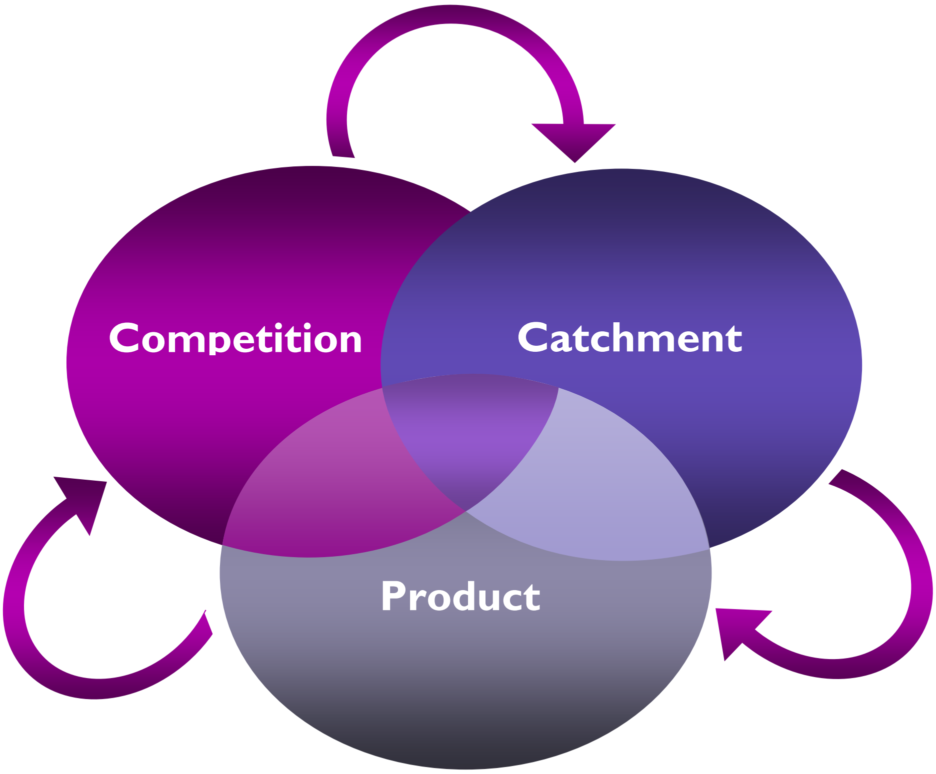


Figure 2.1- Determinants of demand for concerts

4.6 This section of the report sets out the results of the market assessment, including:

- an analysis of developing consumer trends – particularly recreation, leisure and culture
- identification and analysis of key arts and culture market trends (including product, competition) influencing the demand for concerts
- an assessment of audience potential, including identification of catchments and analysis of the demographic and lifestyle characteristics (propensity to attend live music performances) of each catchment
- reference to and an introductory analysis of complementary or competing concert venues in Norfolk
- a review of provision of facilities relative to Norwich's CIPFA (Chartered Institute of Public Finance and Accountancy) 'nearest neighbours'

- an introduction to key considerations inherent in venues for the music genres for which demand appears most pronounced.

Existing supply

4.7 The review of the current supply of facilities capable of hosting concerts in the Greater Norwich area has included those venues of over 200 capacity. However, we would note that smaller venues may also have a part to play in the overall venue ecology of the city and region.

4.8 The largest indoor venues capable of hosting concerts are the University of East Anglia's (UEA) Large Common Room (1,550 capacity) and Theatre Royal (1,300 capacity). Above this level, concerts are/have been hosted at large-scale outdoor venues such as Carrow Road.

Tables 2.1 and 2.2 briefly summarise the current level of provision.

Table 2.1 Summary of current provision in Norfolk

Capacity (range)[iii]*	Number of venues	Venue(s)
200 - 299	1	Norwich Arts Centre
300 - 499	2	Norwich Playhouse Maddermarket Theatre
500 - 999	2	The Waterfront St. Andrew's Hall[iv]#
1,000 -1,599	3	Large Common Room (UEA) Norwich Theatre Royal
1,600 -5,999	0	-
6,000 – 12,000	2	Thetford Forest Blickling Hall
12,000+	1	**Carrow Road**
TOTAL	**11**	

*It should be noted that the large venues i.e. capacity of 5,000+ are either professional sports venues (i.e. Carrow Road) or other outdoor facilities not primarily designed as concert venues.

[iii] Stated capacities are maximum levels (i.e. if standing provision is used)
[iv] St. Andrew's Hall is included at this stage despite its current event hosting limitations

Table 2.2 Existing venue provision in Norfolk*

Venue type	Existing provision in Norfolk	Capacity	Example events	Comments/additional information
Stadium	Carrow Road	26,034	Football, George Michael, Elton John	Home of Norwich City FC. Stages occasional concerts (one in 2005, one in 2007) during summer months in football close season
Outdoor venue	Thetford Forest	6,000	Travis, Weller, Madness, Beautiful South, The Sugababes	Outdoor venue, hosts occasional events but does not provide consistent programme
	Blickling Hall	10,000	Will Young, Westlife, Shirley Bassey, Tom Jones, Meatloaf	Has been hosting outdoor concerts since mid-1990s. Hosts occasional events but does not provide consistent programme
Other	Norwich Arts Centre	120 seating 290 standing	Martin Carthy & Dave Swarbrick, Jason Molina, Annabelle Chvostek, Spiers and Boden	Hosts wide range of live music performances
	The Waterfront	200 seating 700 standing	Roots Manuva, Noah & The Whale, Bad Manners	Operated by the Students Union of UEA. Opened as a multi-purpose venue in 1990. Hosts all forms of music

Venue type	Existing provision in Norfolk	Capacity	Example events	Comments/additional information
Concert hall	St. Andrew's Hall	900 seating 1,200 standing	Britten Sinfonia	Britten Sinfonia has now moved its Norwich venue performing 'base' to Theatre Royal
Mid-size venue (primarily concerts)	Large Common Room (LCR), UEA	1,550	Good Charlotte, The Hives, Robyn, James, The Streets	Built in 1960s. On campus of UEA. Standing only
Theatre	Maddermarket Theatre	310	Sense & Sensibility, Rosencrantz & Guildenstern Are Dead	Stages a year-round theatre programme by top playwrights, staged by members from across the region
	Norwich Playhouse	300	National Youth Jazz Orchestra, Music To Watch Girls By, An Evening of Jazz and Cabaret	Hosts live music, dance, comedy and drama
	Theatre Royal	1,309	La Boheme and Tosca, Glyndebourne On Tour, Glen Miller Orchestra, Britten Sinfonia, Beauty & The Beast, Footloose, Dionne Warwick	Civic theatre and national touring house, recent £5m refurbishment. Welcomes economically viable presentations of all forms of music.

* Includes information drawn from British Performing Arts Yearbook 2007/2008

Market and consumer trends

National trends - Disposable income and spending on arts, recreation and culture

4.9 The last 20 years have seen substantial increases in the amount spent in the UK on leisure and recreation activities. Rising disposable incomes and developing consumption trends mean modern households now devote almost a fifth of their weekly spending to leisure goods and services, such as trips to the cinema, theatre, internet links and satellite TV (Family Spending, Office of National Statistics 2007 edition). Leisure services now constitute 15% of household expenditure, up from 10% in 1987. Leisure goods constitute 5%.

4.10 Weekly household expenditure in the UK and expenditure by the 12 COICOP (Classification of Individual Consumption by Purpose) categories shows expenditure on recreation and culture to be second highest of all categories at £58.50 a week. Average weekly expenditure on this category is circa 20% higher among households with a head of house (Household Reference Person – HRP) aged 30-49 or 50-64.

4.11 Cinema, theatre and museum spending is highest among those aged 30-49 (£2.50 per person per week) and those 50-64 (£2.30 per person per week). Live entertainment (theatre, concerts, shows) accounts for over half of this expenditure. A total of £27 million per week is spent across the UK on live entertainment (theatre, concerts and shows). These figures do not include spending on attending sports events.

4.12 Average weekly expenditure on recreational and cultural services in the East region is second highest among the countries and regions of the UK, trailing only the East Midlands. However, average weekly cinema, theatre and concert expenditure in the East is slightly below the UK average level.

4.13 Disposable income levels in the East region are third highest amongst all UK regions, and slightly higher than the England and UK averages.

4.14 As expenditure on recreation and culture has increased, so has competition for this consumer spending. This is particularly linked to the emergence and development of new delivery channels and home entertainment choices.

4.15 With their higher levels of education (and demographic trends showing an increase in the average age of the population), tomorrow's seniors might also be expected to boost museum and performing arts attendance. However, arts attendance is currently significantly lower among those aged 75 or older.

National trends – propensity to attend arts/cultural venues and performances

Informing Change - Taking Part in the Arts: survey findings from the first 12 months (Arts Council England, May 2007)

4.16 Arts Council England (ACE) commissioned a major survey on levels of attendance and participation in the arts and cultural activities, and attitudes towards the arts. Specific to concerts and live music, the key findings of the Taking Part survey were:

- as a whole, live music events were most likely to have been attended by members of the AB and C1 social classes
- for music events, a larger proportion of males and people aged 25 to 34 had attended
- live music (including pop and rock) is the most popular arts event among 16-24 year olds.
- attendance rates in the East region (69% attend at least one arts/cultural event per year) are higher than everywhere but the South East and the South West
- live music was the second most-commonly attended event in the East region, behind theatre, with 25% of people having attended at least one such event/concert.
- the largest proportion of arts attendees (49%) typically attend arts events relatively infrequently (once or twice per year)
- the percentage of respondents attending an arts event at least once in the last 12 months is fairly consistent among 25-64 year olds, after which it begins to decline
- attendance among those aged 75 and over is significantly lower than among all other age groups. Younger adults aged 16-24 also attend at a lower rate than those aged 25-64
- those in lower socio-economic groups are less likely to have attended arts events than those in higher socio-economic groups. Those in higher or lower managerial occupations are more than twice as likely to have been to at least one arts event over a 12-month period than those who have never worked.

Catchment demographic analysis

4.17 A wide range of factors contribute to the attendance levels of specific art forms, events and performances. Practical considerations including cost, venue quality and location, accessibility and timing might have an influence on an individual's propensity to attend events.

4.18 Personal preferences about types of arts events or activities also contribute to the demand picture. For example, some people may like events requiring formal attendance at a specific time and venue (concerts, theatre etc), while others prefer less formal events, such as carnival and street arts events. These preferences are shaped by a complex network of factors linked to the social, economic and cultural context in which a person or a population lives (ACE).

4.18 In order to develop a full picture of the potential market for future venues and events, analysis of 30, 45 and 90-minute catchments from the centre of Norwich has been completed (using City Hall as the centre point). This addresses the primary catchment(s) from which attendees for concert events are likely to originate.

4.19 The industry regards 30 minutes to be the maximum journey time that the majority of attendees or visitors will travel by car to most arts events. However, less common events such as large-scale productions of musicals or pop/rock concerts would be likely to attract people prepared to travel on the day for 45 or 60 minutes (ACE).

4.20 It is not realistic to hypothesise that all identified potential arts attenders in a given drive-time catchment around a particular venue will go to it, since some may well prefer to go to another venue. As such they are therefore not all necessarily equally 'available' to a given venue at the centre of that area although this provides a useful first tool of analysis.

4.21 Analysis of 2001 Census data shows that there are:

- 344,063 people living within a 30-minute drivetime catchment of Norwich
- 625,603 people living within a 45-minute drivetime catchment of Norwich
- 1,714,201 people living within a 90-minute drivetime catchment of Norwich.

4.23 The catchments are relatively small in total population terms. This, increased propensity to attend concerts notwithstanding, results in a smaller market from which year-round demand can be drawn.

Catchment demographics – implications for concert demand in Norwich

4.24 Profiling the propensity to attend arts events, and analysing the implications of these trends for the Greater Norwich catchment, further informs the projection of demand in the market. This allows assessment of the social and spending habits, and leisure activities and values, of different segments of the market.

4.25 ACE provides reports offering overview analysis of defined catchments around cities/central points. This analysis complements the preceding information by offering an overview of the size and demographic characteristics of the population, and the number of adults who attend concerts - estimated from Target Group Index (TGI) and ACORN data.

4.26 The attendance numbers and percentages relate to adults participating in the TGI survey who claimed to attend particular types of arts performance or who have visited particular events/venues in the last 12 months. The figures for potential attendees do not predict the actual numbers of attendees which a venue could reasonably expect to attract, but provide further guidance on the propensity/ likelihood of success.

Attenders (TGI)	Catchment propensity to attend	National average propensity to attend	Index 100	Total potential attendees
Opera	8.0	7.8	102	24,310
Classical Music	16.9	15.7	108	51,669
Jazz	9.6	9.4	101	29,212
Pop/Rock	27.7	27.8	100	84,502

Table 5: - Catchment summary – 30-minute drivetime

Attenders (TGI)	Catchment propensity to attend	National average propensity to attend	Index 100	Total potential attendees
Opera	7.7	7.8	99	42,700
Classical Music	16.6	15.7	106	91,348
Jazz	9.2	9.4	97	50,777
Pop/Rock	26.8	27.8	97	148,011

Table 6: Catchment summary – 45-minute drivetime

Attenders (TGI)	Catchment propensity to attend	National average propensity to attend	Index 100	Total potential attendees
Opera	8.0	7.8	103	122,373
Classical Music	16.9	15.7	108	257,613
Jazz	9.6	9.4	102	146,478
Pop/Rock	27.6	27.8	99	419,874

Table 7: Catchment summary - 90 minute drivetime

4.27 ACE data suggests that the Norwich catchments do not vary significantly from the national average in terms of their propensity to attend musical events. The 30, 45 and 90-minute catchments are within 10% of the national average propensity to attend events of all musical genres.

4.28 Amongst the four genres analysed by ACE, demand is most pronounced for classical music. The propensity to attend classical music is 6-8% higher in each of the three catchments. However, in each instance the number of potential attendees is limited by the relatively small scale of the catchment – with just over 1.5m people within 90 minutes drivetime of central Norwich.

4.29 On the basis of this analysis, it would appear sensible to focus analysis of the market on classical music (as the genre with demand most exceeding the national average) and pop/rock music as the genre with the highest demand in total terms. The catchments do not exhibit characteristics suggesting sufficient demand (in total attendee terms) for opera and jazz to merit consideration for additional large-scale provision.

Existing entertainment venue provision in comparator marketplaces

4.30 For most leisure and cultural facilities, competition can be defined within a geographical catchment area. However, this is not typically the case for an arena or popular music venue. Whilst attendance will be impacted by geography (accessibility, catchment size) and competing facilities within a defined radius, securing product and events is subject to regional, and indeed national, competition.

4.31 For example, securing one or more dates on a national concert tour is subject to a number of factors, including the number of performances available in the tour, scale of act/production, promoter relationships, commercial terms offered, and artist input (eg if a band/artist were to be from Norwich/Norfolk).

4.32 This competition for a finite number of performances means that a venue in the Greater Norwich area is as likely to compete with, for example, Crawley as it is with the geographically closer Cambridge or Ipswich. Despite the apparent absence of substantial provision of concert facilities in East Anglia and within a number of miles of Norfolk, competition is still likely to exist at other levels and promoters will have to determine which venues they take their acts to on factors over and above the competition in a defined radius of Norwich.

4.33 To provide a comparator of Norwich's provision of concert facilities, an initial review of facilities in CIPFA-identified 'nearest neighbour' authorities has been provided. These authorities are those identified by CIPFA as being closest to Norwich on a range of indicators (including total population size, demographic profile and population density). This analysis would allow Norwich to gauge its provision relative to other comparable cities/towns.

4.34 CIPFA has developed a Nearest Neighbours Model in an attempt to adopt a scientific approach to measuring the similarity between authorities. The model takes into account their social and physical characteristics, traditions, organisation and practices, using a number of different indicators to compute a statistical distance between 0 and 1, between authorities.

4.35 On this basis, Norwich's nearest neighbours are:

1. Lincoln
2. Exeter
3. Ipswich
4. Preston
5. Crawley
6. Cambridge
7. Chesterfield
8. Oxford
9. Durham
10. Northampton
11. Cheltenham
12. Harlow
13. Gloucester
14. Stevenage
15. Chester.

4.36 An outline review of these authorities has been conducted to identify the provision of concert venues in these areas. This provides a comparator for the current position in the Greater Norwich area and illustrates where it offers more or less provision. It also has the potential to highlight success factors of facilities in these authorities.

4.37 Table 2.5 below summarises the provision of classical concert halls and popular concert-hosting venues (i.e. those of over 1,000 capacity of which pop/rock concerts are a primary or secondary event) in each nearest neighbour authority.

Authority	Classical concert hall	Pop/rock venue (s)
1. Lincoln	Holywell Music Room	Winding Wheel
2. Exeter	-	Exeter University Great Hall, Exeter Lemon Grove
3. Ipswich	-	Ipswich Regent Theatre
4. Preston	-	Preston Guildhall, 53 Degrees (UC Lancs)
5. Crawley	-	-
6. Cambridge	-	Cambridge Barfly, Cambridge Corn Exchange
7. Chesterfield	-	-
8. Oxford	-	Carling Academy, Oxford Playhouse, New Theatre
9. Durham	-	-
10. Northampton	-	-
11. Cheltenham	-	Cheltenham Town Hall
12. Harlow	-	-
13. Gloucester	-	Gloucester Guildhall
14. Stevenage	-	Stevenage Leisure & Arts Centre
15. Chester	-	-

Table 8: Concert venues in Norwich's Nearest Neighbour authorities

4.38 The above table illustrates that few of the authorities identified by CIPFA as Norwich's nearest neighbours feature more, or superior, concert facilities. Indeed, those authorities with better provision (Preston, Oxford, Cambridge, Exeter) show similar venue characteristics to Norwich, insofar as being focused around university provision and featuring capacities of comparable size.

Competition

4.39 Arts and cultural venues effectively compete with one another for two key elements – audiences (covered in part in the catchment analysis) and product (analysed later in this section and in Section 4).

4.40 Competition also exists at several levels – including local (covered by our facilities audit, which highlights potential areas of competition with existing Norwich venues), regional and national.

4.41 The nature of competition also changes as the art form/event type changes. For example, competition amongst small-scale or local community music venues is likely to apply to a 20 or 30-minute drive-time area, while less common events such as major pop/rock concerts would be likely to attract people prepared to travel on the day for 45 or 60 or even, exceptionally, 90 minutes.

Product

4.42 The third key determinant of demand for concert venues is the availability and desirability of product – the collective term given to concerts, plays and productions that constitute venue event days. Venues need quality product to attract audiences and generate income.

4.43 Venues either compete for existing product, tours and events or produce their own (as is the case with producing theatres, resident orchestras/companies etc) to stage at their own and other venues.

4.44 In recent years, pop/rock music record sales have fallen due to the increase in popularity of downloading. Touring has therefore increasingly become a key source of income for artists, who now tour more regularly to supplement the declining income from singles/album sales. This trend is projected to continue by the music industry, and therefore more and more artists are likely to be touring, thus further increasing the number of acts playing at concert venues in the UK and internationally. As the amount of events increases, competition between venues to secure these concerts is also likely to rise.

4.45 Classical music provision is substantially influenced by the presence of a resident orchestra. Attracting and sustaining an orchestra is very expensive, but usually key to ensuring a venue has a consistent and sustainable programme. While this activity can be supplemented by touring product, the key driver remains the resident orchestra.

Supply chain

4.46 The availability of product is market-led. This revolves around whether promoters have the will, and believe there is the commercial rationale to, bring events to Norwich. Typically, a promoter will seek a particular scale of venue, often with a particular size and profile of catchment, although will be willing to move up in scale if demand increases, or potentially move down in scale and play additional dates. The necessity for events to be at least revenue-neutral is more pronounced given that consultation has suggested that public subsidy for a music venue is unlikely to be available.

4.47 A number of factors affect the availability of touring product for a city's venues. These include market conditions (available supply of events), relationships with promoters controlling events and productions and artist preferences.

4.48 This also might extend to determining a 'touring route' from venue to venue which minimises travel and practical considerations where possible. In many cases, artists are likely to be largely unaware of where they are performing on a given night, with decisions determined by the promoter.

Venue scale options and technical considerations

4.49 The Council should consider several factors in determining the ultimate scale of any concert venue to be delivered. We have set out below an introduction to some of the key determinants of a concert venue's success, based on our knowledge of the market and also consultation with promoters.

Pop/rock

4.50 The calibre of event/artist that can be attracted to a venue is determined in large part by audience capacity. However a number of other complex factors also impact upon this, such as ease of get-in/get-out and catchment demographics/likelihood of the venue selling out.

4.51 'A List' acts such as Madonna, Prince, and The Rolling Stones are likely to demand and justify large-scale arena venues, or even stadia, and are very unlikely to play smaller venues (say those with a capacity of under 10,000) as part of their tours. However, there are not many artists to whom this would apply – it is a rather elite group.

4.52 The majority of acts would not be able to consistently sell out events at the larger end of the concert venue scale – ie arenas of 16,000+ capacity, and there is far more product available at the c.3,000+ range.

4.53 The nature of the act would also tend to steer promoters towards particular venues. For example, many artists and their fans would prefer purely, or at least substantially, standing venues with limited or no seating. This is dependent largely on the demographic to which the artist appeals – those with an older demographic would more typically seek venues with more seating capacity than standing.

Classical music

4.54 As with pop/rock concerts, the calibre of event/artist that can be attracted to a venue is determined in large part by audience capacity. However, acoustics arguably play an even more significant role in venue selection for classical music. The acoustic performance of the venue hosting the event is absolutely central to the quality of the performance and the experience of the audience.

4.55 Achieving the required acoustic is a very substantial engineering and design exercise, and only achievable in new build venues at significant expense. It is for this reason that classical music now is hosted by venues built many years ago, as the capital investment required is too large for the public sector to afford based on the returns achievable.

4.56 Delivering the required acoustic would be absolutely central to securing a resident orchestra. Capacity is also a consideration, but larger classical music venues would more typically be in the range of 1-2,000, and very seldom larger than this.

Conclusions

4.57 Assessment of the Greater Norwich audience catchment, together with a review of existing venue provision in and around the city and in Norfolk, has provided an initial insight into the potential demand for new concert hall provision.

4.58 This review has shown that Norwich presently has a relatively wide range of venues across different types and of different capacities and attributes. Comparing provision with Norwich's nearest neighbours suggests that the city is broadly in line with these comparator authorities at the larger end of the venue market.

4.59 Analysis has illustrated that the Greater Norwich catchment does not exhibit characteristics that suggest an overwhelming case for the delivery of additional concert hall provision. Classical music and pop/rock are the two genres for which there appears to be greatest demand.

Section 5 Product / Market Assessment

Greater Norwich Conference Product

5.1 The accommodation and conference stock across Norfolk in general is varied in both size and quality. The current product offer consists of a large proportion of non-residential venues and small (less than 100 beds) hotels, which according to a venue database supplied by EEDA looks as follows:

Venue Type	Number
Hotel	70
Unusual venue	24
Academic	3
Conf training centre	3
Purpose built	5
Multi purpose	9

Table 9: Venues in Norfolk – EEDA database

When analysed by size, this supply looks as follows:

Theatre style capacity of largest room	Number of venues
Less than 50	20
5 0 - 100	32
101 - 250	39
251 - 500	18
501 - 999	4
1000+	1

Table 10: Supply by capacity of largest room

5.2 As can be seen from the above table there are 94 establishments in Norfolk that can accommodate the average 50 to 100 delegate conference and 62 that can accommodate more than 101 delegates. National research and local research conducted by Vivid Interface has confirmed that having the event venue and accommodation in the same location was very important to 73% of buyers. In assessing the product with on site accommodation we find that only 4 establishments in the Greater Norwich area (excluding UEA) can both accommodate a conference of more than 150 delegates and offer more than 100 rooms and of these only three are in the centre of the city.

5.3 In addition conference organisers generally request that hotels have a minimum 3 – 4 star rating from an accredited rating organisation (e.g. Visit Britain, AA or RAC) and often require a 5 star hotel for key guests and speakers. Analysis of the serviced accommodation in Greater Norwich shows that the only 4 star hotel accommodation is to be found outside the city centre and that no 5 star accommodation exists.

5.4 Current hotel occupancy rates in Greater Norwich are high at 75%, driven by non discretionary business travel. Consequently evidence suggests that Norwich does not currently have sufficient accommodation to support a substantial increase in bedstock demand.

Conference venues

5.5 The conference venue product across Greater Norwich is limited in size. Whilst there are a number of venues many have a capacity of less than 300. According to analysis the venue stock across the sub region is as follows: (venues with a minimum capacity of 200).

Venue	Max Cap Theatre
Norfolk Showground	4000
St Andrews & Blackfriars Hall	900
Marriott Sprowston Manor	500
Holiday Inn, Norwich City	500
Forum Trust	500
King's Centre	500
UEA Conferences	485
Open/Bank Centre (avail 1/09	400
EPIC Studio	350
Norwich City Football Club	350
John Innes	320
Ramada Jarvis Hotel, Norwich	300
De Vere Dunston Hall	300
Norwich Playhouse	300
Assembly House	300
Old Brewery House	200
Quality Hotel	200
SCVA	200
Hotel Wroxham	200

Table 11: Source Tourism UK Ltd

Competitor analysis

5.6 In the large conference market Greater Norwich is likely to compete with other heritage cities/towns and so the following table considers the offer in Greater Norwich in comparison to that offered in York, Bath, Chester and Oxford.

	Greater Norwich	York	Bath	Chester& Cheshire	Oxford & Oxfordshire
Conferencing:					
Max Conf Capacity	900	1500	1700	600	900
Venue:	St Andrew's Hall	Barbican	The Forum	The Crowne Plaza	Kassam Stadium (not city centre)
Type of	Concert / Conference	Multi purpose	Multi purpose	Hotel	Football Stadium
Max Exhibition space (m^2)	1000[5]	2100	1200	1200	2000
Banqueting	200	600	350	550	550
Accom:					
No. hotel beds en suite	1498 (inc 160 at airport)	3300	2748	4958	2313
Largest City hotel	159	200	150	360	270
3* beds (city Centre)	510	1150	385	2700	747
4* beds	0	800	431	2137	1566
5* beds	0	0	149	121	0
Hotels with over 80 beds in city centre	5	10	4	8	4
Total no. of beds	614	1217	500	963	560
Infrastructure:					
Parking at main venue (St Andrews)	Limited	limited	700 spaces	Limited parking	2000 Free spaces
Subvention	no	no	n/k	yes	no
Approx conf desk income	Limited	£500k	£200k	£475k	£300k

Table 12: Competing destination offers – Tourism UK Ltd

Key points arising from this analysis are:

5.7 Only York and Bath offer multi purpose entertainment venues for conferences, Chester's largest capacity venue is a hotel and Oxfordshire has an out of town football

[5] Norfolk showground exhibition hall can offer 2800 but is outside the city centre

stadium. York's venue – The Barbican - is currently undergoing development and will open later in 2008.

5.8 None of the competitor destinations offer purpose built exhibition space

5.9 Although all destinations have considerable bed space on offer only York and Chester offer more than 5 large (80 bed) hotels in the city centre, providing 1217 and 923 bedrooms respectively.

5.10 As can be seen the offer in Norwich falls a little behind the comparator cities particularly in relation to the provision of higher quality bedspace.

Key stakeholder consultation (conference centre)

5.11 Over the course of this study, a number of key local stakeholders have been consulted to gauge their views of the market, and the scope to deliver a new conference venue that would complement existing provision and fit with pertinent local and regional strategies.

5.12 This consultation has included current venues, local authority representatives, local accommodation operations, national buyers and planning departments.

5.13 Key findings from this consultation included:

- There was a general view that Norwich should have a purpose built large scale conference centre, but few consultees were convinced that there was a demonstrable market need
- Capital and revenue funding for a new development could be very difficult to find
- An iconic building would probably be too expensive, Norwich must be realistic on the scale of facility that it can support
- Norwich could not and should not try to compete with conference destinations such as Harrogate
- Possible locations might include the City Centre or the University, though the latter is not as convenient for traffic
- A city centre location would be more attractive due to the proximity of retail and food and beverage provision

- The show ground is a possible location but lacks a rail connection and would need new hotel facilities
- A major development would displace significantly from St Andrew's and would leave this public building looking for a use – could become an enormous liability
- Concern that St Andrew's as a solution would not overcome all of its issues, could be very costly
- In existing buildings were extended or altered to provide a venue the core use of the building would need to sit comfortably with the expectations of the corporate conference market
- If a city centre solution was developed consideration would need to be given as to how the impact might extend beyond the city

Soft market testing (conference centre)

5.14 This research has been supplemented by consultation with leading conference event agencies to obtain a qualitative analysis of the potential for future conference hall developments. The general view was that the brand image of Norwich was neither positive nor negative. Norwich was described as a second tier city behind a first tier which included London, Manchester and Glasgow.

5.15 Organisers of large medical conferences stated a preference for purpose built modern facilities with exhibition space though organisers of smaller events said that a converted heritage property would be less of an issue as long as the venue was suitably equipped and offered excellent service standards.

5.16 According to an analysis of business lost, using the Chaser software held by the Norwich and Norfolk Conference Bureau, between 2005 and 2008 seven enquiries were lost due to the lack of large enough venue in Norwich. In total these enquiries were valued at £1.25 million, though the gross economic impact would have been somewhat greater.

5.17 Of course this analysis simply measures enquiries that were not converted, it is impossible to know how many enquiries were not made because the buyer already knew that the facilities were inadequate.

5.18 Anecdotal evidence collected from attendance at buyer exhibitions and comments from agents suggests that Norwich is not considered for the larger conference because access to the destination is weak, because awareness of what Norwich has to offer is low, but also because it is quickly identified that the right facilities do not exist. That is not to say that Greater Norwich with enhanced facilities and a strong marketing approach could not attract smaller association events related to specific themes.

5.19 Other demand would normally come from the corporate market where, for example, the conference is organised by a company for an internal meeting. As stated earlier such conferences are driven by location and demand can be a factor of the urban nature of the destination. Despite being the home to Virgin Money, Archant and Kettle foods Greater Norwich does not have the critical mass of businesses necessary to attract a significant number of major corporate events.

Concert hall product

5.20 As noted in Section 2, classical music and pop/rock are the two genres for which there appears to be greatest demand.

5.21 A key determinant of the sustainability of any concert venue provision will be the availability of product, since promoters will ultimately be expected to deliver events and acts to make a venue sustainable, or in the case of a classical venue a resident orchestra is needed to sustain higher levels of use.

5.22 This section of the report presents a review of existing music product visiting the area/region, and summarises consultation with members of the GNDP and other key local stakeholders relating to live music venue provision. It also presents the findings of discussions with a number of leading promoters and private sector venue operators on the potential to increase the number (and scale) of events attracted to Greater Norwich if new (or, to a lesser extent, improved) facilities were developed.

This review of the product market therefore includes:

- analysis of events held at venues in Greater Norwich in 2008 (and further back in the cases of larger venues that have hosted occasional concerts)
- presentation of key points raised during consultation with key stakeholders

- soft market testing with key industry figures including operators and promoters to gauge opinion on the state of the Norwich/Norfolk market, scope to attract further events, and the feasibility of new concert space provision

- a review of displacement issues that ought to be considered in investigating the delivery of a new venue.

Existing concert product in Greater Norwich

5.23 An illustrative research exercise conducted by PMP as part of this study shows the level and scale of concert activity in the Greater Norwich area.

5.24 A listing of the events that are scheduled to visit Greater Norwich in the remaining months of 2008, is provided in the appendix 3.

5.25 This exercise, combined with research and consultation (presented below) has shown, in particular, the ability of existing venues to attract pop/rock concerts and classical music events to the area.

5.26 UEA has attracted a number of successful acts that would be expected to tour similar venues elsewhere in the UK. On a less consistent basis, outdoor venues such as Blickling Hall, Thetford Forest and Carrow Road have been able to secure high-profile bands and anecdotal evidence suggests that tickets sold well.

5.27 The level of programming at The Waterfront has been reasonably constant over the last few years at c.110 event days, all of which have been rock/pop concerts. UEA has attracted up to c.70 events each year.

5.28 Given the absence of a resident orchestra, together with the general patterns and characteristics of this genre, it is unsurprising to note that classical concerts are less regular in Norwich. Britten Sinfonia performs c.10 times per year in Norwich (6 main orchestral and 4 chamber concerts). It recently moved from St. Andrews Hall to Theatre Royal to capitalise on the superior ancillary facilities.

5.29 Although very keen to retain a strong regional/local presence, in the medium-long term Britten Sinfonia has international aspirations rather than wishing to stage many more concerts in Norfolk. This suggests limited scope to increase their existing number of performances in Greater Norwich.

Key stakeholder consultation (concert hall)

5.30 Over the course of this study, a number of key local stakeholders have been consulted to gauge their views of the market, and the scope to deliver a new concert venue that would complement existing provision and fit with pertinent local and regional strategies.

5.31 This consultation has included current concert venues, local authority representatives, local music organisations, and Arts Council East.

5.32 Key findings from this consultation included:

- Norwich previously bid unsuccessfully for the Capital of Culture title, though the submission was far more about the city than about physical venues. It will bid again in 2025, but again this is not contingent on the delivery of new venues
- Norfolk County Council has budget support for a cultural programme, with £100k/year towards a London 2012/Cultural Olympiad work and event programme
- Norfolk City Council is willing to invest further in the Norfolk & Norwich Festival, and want this to be a major international festival
- no orchestras of whom Arts Council East is aware are looking for a new home/residency
- Arts Council and Lottery funding has mainly been used for visual arts and literature – these are key strengths of Greater Norwich and will continue to be key strands/cultural strengths, though this does not preclude other art forms from figuring prominently and being developed further
- ancillary facilities and seating at St. Andrews Hall are poor, which:
    - has a significant negative impact on the audience's enjoyment of events
    - has constrained Norwich's ability to bring internationally-renowned classical artists to the city
- the public sector invested considerably in Theatre Royal improvements to make it more fit for purpose for classical music events (acoustic improvements)
- there are few identifiable venue gaps at present

- a lack of venue capacity has occasionally been an issue in trying to attract events to Norwich, which have perhaps been lost to Cambridge Corn Exchange (1,850 capacity)
- there is no venue in the Norwich market catering for events requiring between 300 and 1,300 seats (this excludes St. Andrews Hall at this stage; other venues fit in this range but provide standing only) – a classical venue in this range could work if it were delivered under the same umbrella as existing venue(s)
- there is considered scope for Carrow Road to expand its activities in line with the level set by, for example, Portman Road (Ipswich) ·
- Thetford Forest has proven popular with events/promoters – the bands that they have booked are those that people want to see and events have run at c.90% capacity
- Norwich is considered to perform well in attracting pop/rock concerts, based on the facilities that it has
- the population density and pulling power of Cambridge are perceived to be much stronger than Norwich
- Theatre Royal has staged rock/pop concerts in the past but not very successfully as the building caters far better for theatre events
- Brittens Sinfonia has scope for a slight increase in events given suitable, available facilities
- Glyndebourne visits Norwich once a year, and Theatre Royal is in discussions with Opera North for them to return
- there is the potential to develop further audiences for classical music and to sustain a few more classical performances/events each year.

Soft market testing (concert hall)

5.33 This research has been supplemented by consultation with leading venue operators and concert promoters, to deliver a qualitative and quantitative analysis of the potential future concert hall product supply.

Consultation provided a market opinion of the Greater Norwich area, and is particularly key since ultimately the commercial appeal to the private sector will largely determine the ability to secure event days, and consequently the long-term viability of any concert venue.

5.34 This consultation has provided an overview of the perceptions of the private sector. Specifically, discussions with promoters and venue operators was focused on the current appeal of the market and existing venues, appetite for investment in facilities, and the potential to deliver additional product given the delivery of a suitable concert venue.

5.35 Key findings, and consensus of opinion, included:

- there is not really a private sector appetite to bring many more events to Greater Norwich – the market is not a particular priority for leading promoters
- Norwich is a very tough market given its location – it is perceived as being isolated and having low population levels, making it a hard sell to many promoters
- a pop/rock venue would be unlikely to be self-sufficient (i.e. it would not be expected to attract significant additional event days) and therefore would not be able to fund debt
- no orchestras of whom ACE is aware are looking for a new home/residency
- were a purpose-built classical concert hall to be developed, Britten Sinfonia would potentially be able to deliver an additional 3/4 event days per year on top of their existing presence in Norwich
- ACE is not looking to fund any other orchestras/venues in addition to its existing commitments
- Snape Maltings concert hall is undergoing capital development (extension of facilities - additional smaller auditoria, and residency rehearsal spaces)
- Cambridge is also looking at a similar concert/conference facility
- Theatre Royal is now more capable of hosting classical events following its investment and refurbishment
- established operators would potentially be interested in managing a venue in Norwich, but would not be willing to invest any capital in its delivery
- c.2,500 capacity venues are typically delivered through conversion/refurbishment of existing venues (e.g. theatres) to host live pop/rock concerts with a mix of seating and standing

- UEA "is what it is" and meets a need – there is potentially a gap above this level (1,550) but this is unlikely to deliver a substantial number of new event days

- delivering a venue of above c.2,000-2,500 capacity would not make commercial sense from an operator perspective as the scale/calibre of events that could be attracted would not merit this.

5.36 Together with the assessment of the concert market completed in Section 2, this consultation provides a strong overall understanding of projected demand in the Greater Norwich area. Section 4 of this report distils these findings in an analysis of the feasibility and sustainability of a series of venues that could meet identified gaps in the Greater Norwich market.

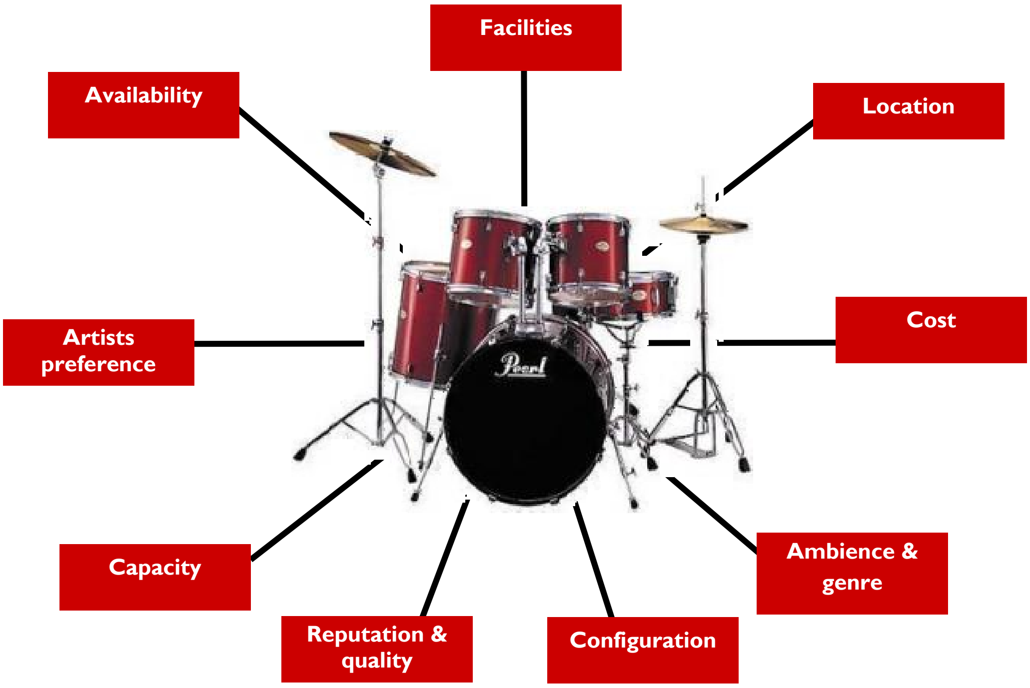
Potential displacement issues

5.37 The market research detailed in the previous two sections highlights that there are a number of venues of differing scales and technical capabilities that currently attract a range of product and audiences to Norwich. When identifying options for the development of a new, or improvement of an existing, venue, it is important to consider the potential displacement impacts that could arise. Displacement is where one venue is substituted for another within a defined area, in this case the greater Norwich area. Displacement impacts relate to both audience and product, however we have only focused on product in this instance.

Product displacement

5.38 Figure 3.1 below identifies the key features that affect a promoter's decision to bring shows/acts to a venue. The critical ones to compare for potential displacement at a local level are capacity, availability, configuration and cost.

Figure 3.1 – Key factors affecting venue choices



5.39 The potential for product displacement locally is considered as part of the options appraisal in Section 4.

Conclusion

5.40 The conference venue product across the area offers limited capacity. Whilst there are around 35 venues that can accommodate over 100 delegates only 15 have a capacity of over 300 and few can offer associated exhibition hall space. St Andrews Hall and the Norfolk Showground have a greater capacity but neither meets the expectations of the larger event buyer. The lack of venue capacity and the lack of 4 & 5 star hotel accommodation significantly restricts the potential conference market that can be attracted to the area. Any development of new conference facilities would therefore need to be supported by new accommodation developments. Experience from other cities (Glasgow, Newcastle) suggests that if plans to develop a conference centre were put in place this might stimulate private sector interest in the potential to develop new hotel stock.

5.41 There is evidence of some latent demand in the conference sector but this is limited. Buyers suggest that the lack of facilities is not the only factor restricting conference demand and that awareness and location are also key issues. Given this assessment it is not proven that sufficient demand exists to justify the development of a new build large scale conference centre.

Section 6 Market Opportunities

Concert Hall opportunities

6.1 Having provided an overview of the concert hall market, specifically for pop/rock concerts and classical music, and reviewed the existing programming of Greater Norwich's venues through analysing events hosted, it is possible to identify a series of potential market gaps.

6.2 These gaps include:

- large-scale (10,000+ capacity) indoor arena
- c.2,500+ capacity 'Academy' style pop/rock venue
- c.800-1000 capacity purpose-built classical concert hall.

6.3 These options are analysed in turn below, and their feasibility is summarised in each case to determine how deliverable and desirable they would be for Greater Norwich.

Large scale indoor arena

6.4 The UK has, over recent years, experienced substantial growth in the provision of arenas to meet demand for major rock/pop concerts. New venues have been delivered in cities including Nottingham, Liverpool London, and plans are well-advanced in cities such as Leeds and Glasgow.

6.5 Typically with a capacity over 10,000, and with a number of different internal designs/seating configurations, arenas are able to host a range of major events, from sports to large-scale conferences and concerts.

6.6 They have increasingly been seen as a 'must have' for a number of UK cities to present a modern image and due to the expectation that an arena can deliver a substantial economic impact as well as a valuable community venue to meet demand for entertainment.

6.7 Arenas and large-scale rock/pop venues events typically draw from a catchment of 45-60 minutes, although some events may draw from beyond this and even internationally in certain instances.

6.8 Norwich's 45-minute catchment contains circa c.625,000 people, and the other UK cities that presently sustain arenas have substantially larger catchments.

6.9 For example Nottingham, Newcastle, Liverpool and Glasgow all contain a substantially greater number of people within 30 minutes than does Norwich within 45 minutes. This increases their ability to sustain venues and events as the pool of potential attendees is larger.

6.10 For most leisure and cultural facilities, competition can be defined within a geographical area. However, this is not strictly the case for an arena. Whilst attendance will be influenced by geography (accessibility, catchment size etc) and the competing facilities within a defined radius, securing product and events is subject to regional and national competition.

6.11 There are a number of 'must do' destinations/venues, including London, Manchester and Birmingham. The remaining tour 'dates'/stops are typically shared between 'second tier' locations. Norwich would therefore, for example, be competing with cities such as Newcastle and Sheffield for certain events, thus the event market and number of competing venues in the UK as a whole is an important consideration.

6.12 Promoter relations are therefore central to securing the events necessary to ensure that venues are a commercial success. The availability of product is further impacted by restrictions/commercial reasons that would affect artist availability. These are often determined by existing relationships between promoters and venues, and may take the form of exclusivity/lock-out agreements within an agreed radius of a venue.

6.13 Promoters and operators consulted during the course of this study have suggested that Greater Norwich is not a priority for them, and they feel that it would be very difficult for Norwich to secure the scale and number of events needed to make an arena viable, given the size of the catchment and perceived access/location problems.

6.14 The arena market, and indeed demand for product, has grown substantially over the last 15 years in the UK. It is our view that the market for large-scale arenas in the UK is approaching saturation, particularly assuming the planned developments come to fruition. This does not prevent new entrants into the market, however it does highlight the increasing risk (or potential cost) to local authorities or others of doing so.

6.15 This analysis overall suggests that a large-scale arena venue would not be viable in Greater Norwich.

Potential alternative solution - StadiArena at Carrow Road

6.16 While there is insufficient market demand to justify the delivery of a purpose-built pop/rock venue, there may be an alternative solution. StadiArena offers a solution that effectively partitions a stand at a sports stadium to produce an enclosed arena that can then host concerts and sporting events, plus other events, on non-matchdays.

6.17 Dependent upon the overall size of the Stadium, the seating capacity of the StadiArena can be "flexed" to cater for an audience of 2,000+. The StadiArena solution has been designed by specialists in stadia construction with consideration for the specific requirements of both the core sport(s) utilising the external playing area (in Carrow Road's case football) and the event users utilising the created internal arena (eg acoustics, heating, lighting, ventilation etc).

6.18 The development of this arena-type solution would be contingent on Norwich City rebuilding a stand to include StadiArena. There would be potential for this solution to deliver a sufficient revenue return over c.10 event days per year (of a larger scale than could be accommodated at UEA or Theatre Royal) to merit its delivery.

c. 2,500+ capacity pop/rock venue

6.19 A potential emerging trend in the arena market is a move towards more concert-focused configurations, rather than those capable of accommodating sport to improve the concert/entertainment experience for attendees.

6.20 As noted in Section 2, the number of events/tours demanding the highest capacity venues is relatively low. Analysis of tour dates shows that c.25% of tours play at arenas only whilst most shows also play at smaller concert halls/music venues. As music consumption patterns evolve and more artists potentially turn to increased touring as a means of supplementing falling income from traditional sales, this potentially creates a greater supply of product, particularly for artists that may fill a smaller-scale venue than a 10,000+ seat arena.

6.21 In response to this, an 'Academy-type' music venue may be better placed to secure event days and operate more effectively than a full-scale arena, delivering a superior atmosphere and experience due to its relative intimacy. The greater number of events demanding c.2,500 capacity means a larger pool of potential events for venues of this size to attract.

6.22 Competition is typically more regionalised for mid-size music venues than for arenas. This is due to the nature of the product and the fact that, given the reduced capacity of these venues, events are more likely to play multiple dates and cities to generate income than they are to justify a full arena tour with fewer performances.

6.23 Pop/rock venues of this size would primarily draw from a 30-minute drivetime catchment. As previously referenced, Norwich's catchment is not large relative to other UK cities that sustain larger capacity concert venues.

6.24 As stated in Section 3, the availability of live music product is market-led and commercially driven. Due to the reduction in sales of music singles and albums the 'touring cycle' is now shorter than has traditionally been the case, which increases the amount of events available.

6.25 The availability of music product would be crucial to the success of a mid-scale event venue in Greater Norwich. Promoter consultation has suggested that there is limited appetite to bring additional events to Norwich were a new, larger venue delivered and available. Since UEA and The Waterfront have successful pop/rock programmes at the moment, and Theatre Royal also hosts occasional pop/rock concerts, this suggests that displacement would be a key issue, with venues of a smaller capacity losing events to a larger venue as promoters seek a greater commercial return.

6.26 Venues of this scale are often delivered through the refurbishment of existing larger venues such as theatres, to reduce the capital cost associated with their delivery. Greater Norwich does not have a suitable venue, which means that a new build would be required were a facility of this scale considered sustainable.

6.27 This factor, combined with the apparently limited market appetite for increasing the number of concerts visiting Norwich and importantly the high likelihood of event displacement from UEA, a 2,500 seat pop/rock venue is unlikely to be viable in Greater Norwich.

Purpose-built classical concert hall

6.28 ACE analysis has identified that the Norwich catchments have a higher than national average propensity to attend classical music events. In each of the three drivetime catchments mapped, the population is projected to be over 5% more likely to attend a classical concert than the English average. However, the overall small scale of the catchments does reduce the overall projected pool of attendees.

6.29 In terms of classical music the limited amount of touring product throughout the year and the fact that this will generally appear at a small number of venues with acknowledged acoustics and audience capacity are perhaps of greater significance in determining events than competition between venues in and around Norwich (including Snape Maltings).

6.30 Classical music provision is substantially influenced by the presence of a resident orchestra. Attracting and sustaining an orchestra is extremely expensive (for example Birmingham City Council contribute a grant to the Symphony Hall of over £1.3m per annum), but usually key to ensuring a venue has a consistent and sustainable programme. While this activity can be supplemented by touring product (Theatre Royal has also hosted touring productions from Glyndebourne and regional classical/opera companies), the key driver remains the resident orchestra.

6.31 Britten Sinfonia has confirmed that is not seeking a permanent base in Norwich, nor does it have the aspiration of delivering a substantial increase in event days in Norfolk. They have suggested that, were a purpose-built concert hall delivered in Norwich, there would be the potential to add a limited number of additional event days in the city (on top of the existing c.10 event days per year). Britten Sinfonia presently has a medium-term agreement with Theatre Royal, following the acoustic enhancements and refurbishment that have made the venue more suited to hosting classical music.

6.32 Consultation with Arts Council East has suggested that they are unaware of any orchestras presently seeking a new home, which removes this option for a Norwich venue.

6.33 In any case given the size of the catchment, there is limited evidence that there is currently audience demand to sustain a resident company with a greatly increased number of event days.

6.34 There may be the potential to deliver c.15-20 classical concert event days per year at a suitable venue, given the aspirations of Britten Sinfonia and the ability of the city (ie The Theatre Royal) to attract additional complementary classical performances.

6.35 In the absence of a resident orchestra, and given the high capital costs associated with a bespoke new-build facility (for example Birmingham Symphony Hall cost £40m in 1991, and Manchester's Bridgewater Hall cost £42m in 1996) due to the engineering/technical issues associated with delivering the correct acoustic, it is highly unlikely that a standalone classical concert venue could be sustainable in Greater Norwich.

Potential alternative solution – Mixed-use venue (including classical music)

6.36 Under this scenario classical concerts (c.15-20 event days) would supplement other event days in the venue's programme (potentially including conferencing). While the classical element of the programming would not provide the major base for the event programme, demand and product would potentially be capable of sustaining this number of event days (subject to further research) and it could meet an identified need.

6.37 The success of this venue would potentially be maximised by investigating a management model that would link closely with other venues in the city to deliver the optimum programming solution. This might involve, for example, The Theatre Royal.

6.38 The Playhouse (300 seats) and Theatre Royal (1,300 seats) are presently managed by a single organisation. A c.800 seat venue would sit in the middle of this range and might provide a complementary programming alternative, particularly for events that would not be able to sell out the larger venue capacity.

6.39 As well as delivering suitable ancillary facilities, should the venue be in the city centre, important consideration would need to be given to acoustics and design to allay the fears of neighbours with concerns regarding noise leakage.

Performance venue summary

6.40 Analysis confirms that neither an arena nor a c.2,500+ capacity pop/rock venue nor a purpose-built classical concert hall appears to be deliverable or sustainable in its own right. However, there is potential for two alternative concert venue solutions. Table 4.1 overleaf summarises the conclusions drawn from the options appraisal and presents the concert hall opportunities and potential projects.

Table 4.1 Summary of potential concert market opportunities

Venue type	Deliverable/ sustainable	Alternative solution?
Arena		**StadiArena**
- increasing saturation in the market – competition for events is national rather than local or regional - low catchment population levels within established drivetimes - large footprint and access issues - problematic if pursuing city centre site (for maximum economic impact) - high levels of capital cost associated (c.£40m+) - projected difficulty securing sufficient commercial returns to continue operation and service debt - lack of operator interest in investing capital in the project, although there would potentially be interest in a management contract where risk does not sit with the operator - lack of available product demanding capacity of this scale - low appetite from commercial concert promoters for consistent large-scale events in Greater Norwich	×	- wholly contingent on being developed/delivered by Norwich City FC at Carrow Road - potential to complement existing venues and attract pop/rock concerts requiring over 1,500 capacity - more sustainable due to reduced reliance on securing event days (typically c.100+ events per year for large-scale arena).
c.2,500 capacity pop/rock venue		**N/A**
- absence of suitable scale/type of building (typically large-scale theatre) to refurbish - high level of capital cost associated with delivery of new build, and difficulty securing suitable city centre site - high likelihood that concerts would be cannibalised from current venue programmes (UEA venue and to a lesser extent Theatre Royal) to provide events at a new venue, rather than being additional/new events for Greater Norwich	×	

Venue type	Deliverable/ sustainable	Alternative solution?
- low appetite from commercial concert promoters to bring substantial additional events to Norwich - limited operator interest in investing in/delivering such a venue, therefore risk would remain with the public sector.		
Purpose-built classical concert venue	×	**Mixed use venue (including classical music) venue**
- very high capital cost associated with delivering correct acoustic - lack of available resident orchestra seeking to locate in Greater Norwich - difficulty in generating sufficient event days to deliver sustainable programme without resident orchestra - scale of catchment and resultant demand levels unlikely to be high enough to merit significant number of concert event days - Arts Council East would not invest in a concert hall as a bespoke venue, and is not looking to invest in additional classical orchestras or venues.		- c.15-20 event days as complement to wider event/conferencing programme - filling identified gap for venue with seating capacity between c.300 and 1,300 - management solution and links to existing venues likely to be key to success.

Conference centre opportunities

6.41 Having considered the markets available and the current supply the following product options need to be considered against the market evidence.

- **A large scale out of town conference and exhibition centre – purpose built to meet average specification for such facilities**
- **A medium size multi function facility to accommodate around 800 delegates**
- **A hotel based conference centre facility**
- **Conversion/extension of an existing facility**

A large scale purpose built conference and exhibition centre

6.42 The average large scale purpose built facility in the UK includes:

- 2 or 3 auditoria which have the ability to be converted quickly into different sizes
- Between 10 and 15 meeting rooms
- Exhibition space of less than 5000m2
- A delegate capacity of between 1200 and 2000
- A banqueting capacity of between 1200 and 2000

6.43 As seen earlier the EICC, Sage Gateshead and Bournemouth International Centre fit into this description.

	Edinburgh International Conference Centre	The Sage Gateshead	Bournemouth International Centre
No of main halls	4/5	4	4
No of break out rooms	15	circa 26	14
Max capacity of largest hall (theatre style)	1200	1700	4200
Size of largest exhibition hall	$1200m^2$	None yet	$1800m^2$
Total exhibition space	$2300m^2$	N/a	$3000m^2$

Table 13: Facilities at large centres

6.44 Of course none of these venues or others across the UK are identical; the mix of facilities, marketing, subvention, infrastructure and destination appeal is different in each of them and hence different to what would be on offer in Greater Norwich.

6.45 Research of UK buyers conducted by KPMG suggests that preferred facilities include:

Conference Facilities

- Tiered rather than flat floor
- Flexibility – a room divisible into three is better than three separate rooms
- Break out rooms – a 1500 delegate conference usually requires between four and six 100-200 capacity rooms
- Sufficient smaller rooms – 50 persons capacity
- Large foyer area for registration
- Delegate flow – optimum design for moving large numbers around the building
- Easy link to exhibition hall to ensure maximum footfall
- Seated banqueting
- Disability access
- Storage facilities for organisers equipment

Exhibition Facilities

- Confex requirements – PCOs (professional conference organisers) generally look for 1m² of exhibition space for each conference delegate including catering and lounge areas
- High ceilings and flexible space capable of being divided into smaller areas
- Direct lorry access for multiple lorries to offload equipment
- Ability to host incubator shows – i.e. be able to increase the space over time as the show grows
- High quality at a competitive price
- Access to additional rooms – in addition to offices for organisers and catering areas, break out rooms should be available to host ad hoc meetings or private demonstrations
- 24 hour security
- Technology – broadband and on site a/v facilities with experienced staff to operate

Catering

- Choice of catering suppliers – organisers would like to choose from a selection of preferred caterers
- Branded catering outlets – where possible outlets should be leased to recognised brands e.g. Costa Coffee

Success factors

6.46 For a large scale conference centre, such as is described above, to be successful a number of factors need to be in place as is illustrated in the chart below.

Destination Brand Image

6.47 The destination brand image is of particular concern to the association conference market. The organiser of the conference has to attract delegates who might be required to buy tickets to the event or at the very least will incur travel costs. To attract such delegates requires a strong conference programme and an attractive location. Delegates could well consider the opportunity to visit the destination as a key influencing factor in making the decision to attend.

Sense of Place

6.48 Increasingly conference buyers are looking for venues that are distinctive, UKCMS 2007 shows that use of unusual venues by the association sector has doubled since 2005. In markets where the destination is a key factor in the decision making process the venue itself can play an important role.

6.49 A basement function space in a sterile hotel adds little to the experience yet an interesting building or one in an interesting location can add significantly to the experience. A meeting room space in the Sage Gateshead that overlooks the River Tyne or one that overlooks St James football ground in Newcastle reminds the delegate where they are and creates a memory of the destination. Venues that can create a sense of place are more likely to appeal to the association market and perhaps more likely to see their delegates returning as leisure visitors. The following recent press release is provided an example:

> ***Frozen food supermarket chain Iceland has confirmed that it is to host its annual managers' conference in the city of Liverpool. James Watt, events manager at the retail chain, added: "We selected the BT Convention Centre as our venue because the facilities are second to none and the location on the banks of the River Mersey is outstanding."***
>
> ***Source: venues.org.uk***

Access

6.50 Whilst important to all markets access is possibly of greater importance to the corporate conference organiser. If the organisation is holding its annual conference of regional managers then a key factor in choosing the location will be the ease by which the staff can get to the conference. Too remote a location could increase both the travel costs and the time away from the workplace.

Market Experience

6.51 Bidding for, winning and running large scale events requires an understanding of the market place and the resources and skills to deliver the tasks. This also requires a local business infrastructure that can offer the appropriate level of support including audio visual support and catering. Such resources are usually built up over time in response to demand.

Cultural and leisure Infrastructure

6.52 City centre locations are preferred by both association and corporate markets, partly because of the proximity of cultural and leisure facilities. The ideal venue is one that is surrounded by good quality accommodation, bars and restaurants and other cultural attractions. Close proximity of these facilities to the conference venue can make the venue more attractive to the buyer and can help generate a greater local economic impact. This can often conflict with the need to provide exhibition space on site (a pre-requisite for some larger conferences). In Edinburgh for instance the central location of the EICC makes it an attractive choice yet the lack of exhibition space restricts market penetration; so much so that an £80 Million plan was developed to build underground exhibitions space along side the facility.

Subvention budget

6.53 For a large scale conference venue to be successful it must compete in all areas of the marketing mix. In many cases subvention is required to win the event. This event support might come in the form of the donation of a publically owned venue or free transport once in the area.

Significance to Greater Norwich

6.54 The extent to which each these factors is critical will depend on the conference market attracted. As has been stated previously a Large International Association conference might place more importance on the Destination Brand Image and the Sense of Place than a London company organising its corporate away day which might place more emphasis on access.

6.55 According to consultees Greater Norwich might struggle to compete on a number of these factors with alternative destinations. Particularly in relation to brand image and access.

Development Costs

6.56 The following gives some examples of the development costs of the similar purpose built conference centres across the UK.

- ICC Birmingham: £180M (1991)
- Edinburgh International Conference Centre: £34 Million (1995)
- The Sage Gateshead: c£70M
- Excel: £250M (2000)
- Bridgewater Hall Manchester - £42 Million (1996)

6.57 Many of these facilities were built using economic regeneration arguments thus enabling them to access large pots of public sector and European funding.

Revenue costs

6.58 Globally, conference centres tend not to make a commercial return and a significant number of them are funded by public sector funds in consideration of the economic impact that they return. For example, the EICC in Edinburgh made an operating loss in 2005 of £0.8 Million on a turnover of just under £5.5 Million and an operating loss in 2006 of £0.6M on turnover of just under £6M. ExCel in London made an operating loss in 2003 of £13 Million on turnover of £330 Million (though this is thought to be exceptional). In contrast the Scottish Exhibition and Conference Centre made a small profit of £700,000 in 2003 on a turnover of £12.4 million.

Demand, usage and economic impact

6.59 As stated earlier evidence of latent demand for a facility of such a scale is lacking, however, according to the BCVS the average facility of this type attracts 279 events per year[vi]. This average is however based on only 12 responses and so should be treated with caution. The Edinburgh International Conference Centre (EICC) achieved an average of 180 events in its first 10 years and Edinburgh arguably has a stronger brand image.

6.60 Any assessment of possible usage must, given the paucity of information on actual demand, be based upon some assumptions. If we assume that a facility in Norwich (city centre based) designed to the same standard as the EICC would achieve around 75% of the trading success then it might attract 135 events.

[vi] BCVS 2007

BCVS suggests that such venues average 188 delegates per conference and an average delegate rate of £44. This would suggest a conference turnover of around £1.2 million to which would be added exhibition income, (an exhibition hall of at least 2000m^2 would be necessary to attract the largest conferences), which might bring turnover up to around £1.5M.

After displacement (assumed to be medium to high – given that the average conference could be hosted by a smaller establishment) the net economic impact of such a facility might be in between £5M and £10M.

6.61 Undoubtedly such a facility would require significant revenue funding and it is not thought that capital debt could be repaid.

A medium size purpose built multi function facility

6.62 A combined facility incorporating conference and exhibition facilities and an events space provides a further option for further consideration. As stated in 6.36 classical concerts would supplement other event days including conferencing. As reported in paragraph 6.40 a multi purpose venue might attract 15-20 concert event days as complement to wider event/conferencing programme, filling the identified gap for a venue with seating capacity between c.300 and 800. A robust management solution and links to existing venues is likely to be the key to success. The additional challenge created by such an option would be the impact that such a facility would have on the existing venues such as St Andrew's Hall and the Theatre Royal.

6.63 A venue that could accommodate up to 800 in a single auditorium would also be able to accommodate all but the largest of conferences. A key challenge for such an operation, however, would be the balancing of the cultural programme with the conference market needs; any design would need to accommodate the needs of both markets. The Sage Gateshead, not being a purpose built conference venue, suffers from some of these programming and operational difficulties.

City centre or out of town

6.64 Such a venue would need to be built within easy reach of the city centre if the cultural programme is to be successful, nearby restaurants and bars forming an integral part of the experience. From a conferencing perspective the UKCMS shows that buyers prefer city centre locations allowing delegates the opportunity to visit local amenities.

This also creates a greater economic impact as delegates can spend in the restaurants, bars and local shops. Furthermore a city centre location ensures that the destination experience is added to the conference experience. As seen in paragraph 6.49 this can be very important to certain markets.

6.65 This option would again incur high capital and revenue costs. The combined use of the facilities and the potential income streams from bar and catering income could create some additional contribution to the revenue costs however this is not likely to cover the operational costs of the venue.

A hotel based conference centre facility

6.66 Rather than bridge the gap that exists through a large public sector funded facility an hotel developer could be encouraged and supported to develop a branded large scale hotel and conference centre. This solution would also resolve the gap in the accommodation offer for a 4 star property. However, the market for conferences above 500 delegates is small and the profit motive of a developer would probably restrict any development to below this capacity.

Conversion/expansion of existing facility

6.67 The market analysis suggests that there is some limited potential for an enhanced cultural programme and for larger conferences that are currently lost to alternative destinations. However there is little evidence to suggest that this demand will support a new large scale facility. An option might be to improve existing facilities such as those at St Andrew's Hall or at Norfolk Showground. This option has other advantages and disadvantages. In both cases some trading experience exists; in both cases some facilities are already in place and certain markets have knowledge of these products already. On the negative side St Andrew's is not a purpose built building and even with an extensive renovation programme may still have operational issues not least of which is the lack of extensive exhibition space.

6.68 Norfolk showground might well be perceived as an agriculturally led product. The word showground might put some buyers off; furthermore the location is not city centre and hence the appeal to certain markets would be lessened as will the potential economic impact.

Section 7 Conclusions and next steps

The case for a conference centre

The market

7.1 A review of the business that the conference desk has recorded as lost revealed that, in the last 5 years, Greater Norwich had enquiries that they were unable to convert into bookings that totalled around £1.5 million. This figure does not take into account the indirect economic impact of these events which would obviously be considerably higher.

7.2 It should also be noted that this figure only represents the enquiries received into the conference desks; the actual amount of lost business (taking into account enquiries that went direct to venues and third party agencies) will be substantially higher too. Furthermore, this assessment simply represents business lost, not business that did not enquire because the organiser knew that the facilities were not available; nor does it include large conferences that the conference desks did not bid for.

7.3 A brand only exists in the eyes of the consumer and so it is perhaps unwise to suggest that we can understand the value of the Greater Norwich brand without conducting further research. However, consultations with agents and buyers suggest that the Greater Norwich offer would not be an easy product to sell even if the facilities were in place to satisfy the conference market needs.

7.4 The market gap is therefore small and whilst a new facility could, if it achieved a reasonable (adjusted) market share, generate 135 events per year, it is likely that such a facility would displace the smaller (less than 300 delegate) conference business from existing facilities.

Possible solutions

7.4 Any new development, either new build or the extension expansion of existing facilities will be capital intensive. Perhaps more critically however, the resulting income is unlikely to cover the costs of running the facility and therefore, as is seen elsewhere around the UK, a significant revenue cost will be incurred.

7.5 Discussions with current funders and potential funders lead us to believe that whilst the idea of an iconic Sage Gateshead type building is appealing there is not currently an appetite for a large capital investment or an additional annual revenue cost. Furthermore, a new build facility would leave the city of Norwich with a further problem; what to do with St Andrew's Hall. As there is certainly no evidence to suggest that a market exists to support both, the development of a new facility would leave St Andrew's as a significant heritage building without a use.

7.6 The plans for St Andrew's hall would if completed as outlined to us provide a reasonable quality conference facility but this would not meet the needs of all markets. The lack of large exhibition space would prevent Greater Norwich from attracting the large pharmaceutical events. That being said, its location in the city centre and its proximity to other cultural and entertainment facilities would be appealing to certain other market segments. Furthermore, consultations suggest that capital funding for this facility might be forthcoming, including a significant grant from the Heritage Lottery Fund.

The case for a concert hall

7.7 Market analysis, discussion with key local stakeholders and consultation with promoters suggests that there is insufficient demand to merit the delivery of a new bespoke concert venue for either pop/rock or classical music. Given the specific acoustic requirements of a new venue to host classical music, the capital cost of this option is also likely to be prohibitive.

7.8 Concert provision may however be deliverable as part of a conference venue, strengthening the venue programme through providing additional event days and helping to increase overall activity levels. A number of venues cater for these dual markets elsewhere in the UK and more widely, and operators are keen to see venues with the flexibility to accommodate a wide range of events to maximise sustainability.

7.9 Pop/rock concerts would not require the scale of subsidy necessary to secure and retain a resident orchestra and would therefore place a reduced burden on the public sector relative to classical music. However, it would be important that any provision sought to complement existing venues, particularly UEA, rather than compete.

7.10 Since UEA has ready access to the student population it is likely to be counterproductive for a comparably-sized new venue to try to compete on a like-for-like basis, and unlikely to be achieved commercially (rather than through aggressively competitive pricing) and without significant local unease.

Positioning the Greater Norwich area

7.10 Although limited existing latent year-round demand for cultural facilities has been identified, and the market evidence suggests that a large scale conference centre would be inappropriate, the GNDP may still wish to pursue an aggressive approach to new and improved provision. The GNDP could choose to invest heavily in (an) iconic new venue(s) that is/are not necessarily 'demanded' per se by the markets, but that may serve as an additional draw for conference delegates, tourists and potential future residents. Such a facility could satisfy the requirements of the conference market though displacement would be a key issue.

7.11 As noted previously in this report, demand for cultural events and facilities can in some cases be stimulated by new provision becoming available.

7.12 Were the GNDP to adopt a more externally-oriented approach (ie using arts policy to publicise the region and attract additional inbound tourism) this is not typically so heavily determined by perceived base demand.

7.13 Intelligent investment in new cultural facilities, particularly iconic facilities, in cities such as Manchester and Bilbao has helped further boost tourism due to the appeal of concert halls, conference centres and arenas. As Norwich also has a strong university demographic with the presence of UEA, the ability to retain young, educated people after completing their degrees as they find the city an attractive place in which to live is also potentially key to the region's competitiveness.

7.14 While a more internally-focused development policy would concentrate purely on meeting resident needs, facilitating and supporting cultural growth and social objectives, the intended target groups for an externally-focused approach might be regional, UK-wide, or even international tourists.

7.15 While expensive, in capital and revenue terms, this approach has delivered economic impact benefits for a number of cities. The pursuit of this approach will be determined as much by Norfolk/Greater Norwich's strategy for positioning itself as a destination as by the level of funding that can be generated and concentrated on concert and conference provision.

7.16 As one of the 12 cities that bid to be UK Capital of Culture in 2008, Norwich was a founder member of the DCMS-endorsed Cultural Cities Network. Through bidding for the title, Norwich received Arts Council and lottery funding of £500,000 through the Urban Cultural Fund to promote mainly visual arts and literature in the city. These art forms are seen as particularly key cultural strengths of the city.

7.17 The GNDP may wish to consider whether it wishes to continue to focus on these strengths, or to develop a wider offer encompassing other art forms. Norwich and its partners will ultimately have to determine how aggressive it wishes to be in building on any additional profile and benefit generated by the Cultural Cities Network and whether it wishes to aggressively pursue new venues to attempt to stimulate demand and link to wider marketing and branding objectives including the festivals that currently visit the city.

7.18 Although not presently fully active, their may be future opportunities generated by, or linked to, the Regional Cities East (RCE) alliance. RCE is intended to enhance the way in which the six member cities work together as well as strengthening relationships with regional agencies and Central Government.

7.19 While RCE would not have capital to contribute to a project, its 'place shaping' workstream aims to use key cultural assets to increase the profile of the region. Were RCE to be successful in securing an increased profile for the region, this could potentially complement efforts in positioning Greater Norwich through new venue delivery.

Appendix I
Consultees

Consultees	**Organisation**
Michael Timewell	Norfolk Tourism
Virginia Edwards	Norfolk Tourism
Chris Maw	Price Waterhouse Coopers
Colette Davies	South Norfolk Council
Graham Long	East of England Development Agency
David White	Norfolk County Council
Geoff Rivers	South Norfolk District Council
Laura McGillivray	Norwich City Council
Ken Barnes	South Norfolk District Council
Chris Starkie	Shaping Norfolk's Future
Caroline Jarrold	Jarrold and Sons
Michael Nutt	Visit Norwich
Matthew Wintersgill	Wintersgill Architects
Keith Brown	East of England Tourism
Graham Dacre	Lind US Group
Julie Ashworth	George Hotel
Elly Montgomery	Oakland's Hotel
Philip Search	Broad House Hotel
Jodie Guttrich	Marriott Sprowston Manor
Kelly Chick	Ramada Jarvis
Sue Hodgson	Park Farm Country Hotel
Linzi Malcolm	Maids' Head Hotel
Anne Marie Deere	UEA Conferences
Feng Lee	Broadlands District Council
Ben Burgess	Broadlands District Council
David Willis	South Norfolk District Council
Paul Whitham	South Norfolk District Council
Mike Loveday	HEART
Stephen Johnson	HEART
John Sutherland,	SMG Europe
Paul Latham,	Live Nation
Barrie Marshall,	Marshall Arts
Ian Melding,	Flying Music
Rob Stringer,	CMP Entertainment
Pete Wilson, Limited	3A Entertainment
Neo Sala,	Doctor Music
Nikki Rotsos	Norwich City Council
Mari Martin	Norfolk County Council
Heidi Bellamy	South Norfolk District Council
Peter Wilson	Theatre Royal
Paul Ingleby	The Waterfront & LCR at UEA
David Butcher	Britten Sinfonia
Brian Summers	UEA

Appendix 2

Recent Conference Centre Developments

<u>Recent Conference and Exhibition Product Developments</u>

- **Bournemouth International Centre** completed a £22 million expansion, redevelopment and refurbishment scheme in 2005. This included the addition of an extra 1,500 square metres of flexible multi-purpose space, accommodating up to 3,500 extra people; expansion of the main Windsor Hall to provide seating for 4,300 people; a further 1,000 square metres of meeting/breakout rooms; and refurbishment of the foyer, catering areas, bars and front-of-house facilities. The redevelopment was expected to create over 1,300 extra jobs and an economic benefit of £21 million a year.

- **The Ricoh Arena** Coventry opened on a site adjacent to the M6 motorway in August 2005. The facilities include a state-of-the-art 32,000 all seater stadium (the home of Coventry City Football Club), 6,000 square metres of exhibition and concert hall space, 3,000 square metres of conference and banqueting space, 70 hotel rooms and a major casino resort.

- **ExCel** in London's Docklands is planning further developments. The second phase of its development plan will take ExCeL London to 100,000 sqm of flexible space including a semi permanent auditorium with a capacity of up to 5,000 delegates. It will represent a major investment in providing event facilities of world scale in London, as well as supporting the capital's ambition to host an increasing number of high profile domestic and international shows.

- **Harrogate International Centre** has recently added new meeting rooms/breakout space above the Exhibition Halls at a cost of £5 million. This follows building of the new Hall M, new entrance to Hall A, installation of air conditioning, creation of a new linkway building and major investments in new banqueting kitchens and additional catering outlets. Plans are now in place for a £48M scheme to develop the site adding an additional 2000m^2 of exhibition space

- Construction of the new **Perth Concert Hall** brought a purpose-built concert and conference facility to the city, capable of seating 1,200 people. The building cost £18 million.

Appendix 3

Concert Hall Events 2008

Venue	**Norwich Playhouse**					
Capacity		**300 seats**				
Event	**Event Type**	**Price £ (cat 1)**	**Price £ (cat 2)**	**Price £ (cat 3)**	**Price £ (cat 4)**	**Date**
An Evening of Jazz and Cabaret	Jazz	17.5				07/09/2008
Jacqui McShee's Pentangle	Folk	17.5	15			25/09/2008
National Youth Jazz Orchestra	Jazz	17.5	15	12		27/09/2008
Mitch Benn & The Distractions	Pop	14	12			03/10/2008
The Gentlemen of Motown	Motown	15	13			16/10/2008
Mari Wilson In Concert	Jazz	17.5	15			01/11/2008
Country Legands Solid Gold Show	Country	15				07/11/2008
Music To Watch Girls By	Pop	14	12			06/12/2008

Venue	Large Common Room, UEA					
Capacity	1,550 capacity					
Event	Event Type	Price £ (cat 1)	Price £ (cat 2)	Price £ (cat 3)	Price £ (cat 4)	Date
Avenged Sevenfold						18/01/2008
Kerrang! Tour 2008	pop					31/01/2008
30 Seconds to Mars						03/02/2008
Dropkick Murphys						06/02/2008
NME Awards Tour 2008	pop					13/02/2008
Gallows						15/02/2008
Gigantour UK 2008						17/02/2008
Hot Chip						20/02/2008
Sum 41	pop					22/02/2008
The Hoosiers	pop					02/03/2008
Jack Peñate	pop					06/03/2008
Gary Numan						09/03/2008
Sophie Ellis-Bextor	pop					26/03/2008
Aiden						04/04/2008
Scouting for Girls	pop					07/04/2008
José González						09/04/2008
Down						10/04/2008
Good Charlotte	pop					11/04/2008
Simple Plan	pop					13/04/2008
The Hives	pop					14/04/2008
James	pop					18/04/2008
We Are Scientists	pop					20/04/2008
Supergrass	pop					21/04/2008
The Wombats						27/04/2008
The Australian Pink Floyd Show						14/05/2008
Guillemots	pop					18/05/2008
Amy Macdonald	pop					19/05/2008
Public Enemy						22/05/2008
Terrorvision						25/05/2008
Robyn	pop					11/06/2008
Lostprophets						12/06/2008
Queensrÿche						20/06/2008
Kill Hannah	Pop	9				25/09/2008
The Ting Tings	Pop	13.5				28/09/2008
Foals	Pop	13.5				29/09/2008
The Subways	Pop	12.5				01/10/2008
Sam Sparro	R&B	10				02/10/2008
Travis	Pop	18.5				03/10/2008
DragonForce	Metal	14				05/10/2008
Cansei de Ser Sexy	Pop					07/10/2008
Enter Shikari	alternative					09/10/2008
Dirty Pretty Things	Pop	15				13/10/2008
The Courteeners	pop	13.5				15/10/2008
The Streets	pop	17.5				16/10/2008
Taste of Chaos	alternative	17.5				17/10/2008
Jools Holland	jazz	26				24/10/2008
Less Than Jake	alternative					02/11/2008
One Night Only	pop	10.5				03/11/2008
Alter Bridge	alternative	16				07/11/2008
The Stranglers	pop	23				10/11/2008
Extreme	pop	28.5				12/11/2008
The Zutons	pop					13/11/2008
Dizzee Rascal	Hip-hop	15				17/11/2008
Elliot Minor	pop	12				19/11/2008
New Found Glory	pop	15				20/11/2008
Motörhead	metal	25				21/11/2008
Airbourne	Metal	12				23/11/2008
The Fratellis	pop					26/11/2008
Dreadzone						26/11/2008
The Script	pop	14				27/11/2008
NME Rock 'N' Roll Riot Tour	pop	22.5				30/11/2008
Feeder	pop	22.5				01/12/2008
Fat Freddy's Drop	Dance	17.5				03/12/2008
From the Jam	pop	20				05/12/2008
Levellers	pop	19.5				07/12/2008
Ocean Colour Scene	pop	22.5				08/12/2008
Dashboard Confessional	alternative	15				10/12/2008

Venue	Blickling Hall		10,000			
Capacity						
Event	Event Type	Price £ (cat 1)	Price £ (cat 2)	Price £ (cat 3)	Price £ (cat 4)	Date
Blickling Hall 11th Anniversary	pop	37.5				19/07/2008
1980s' concert	pop	65				14/07/2007
Meat Loaf	rock	37.5				13/07/2008

Venue	Norwich Arts Centre					
Capacity	290 capacity					
Event	Event Type	Price £ (cat 1)	Price £ (cat 2)	Price £ (cat 3)	Price £ (cat 4)	Date
Martin Carthy & Dave Swarbrick	folk	12	10			09/09/2008
Wombatwombat presents Pennines	rock	6				12/09/2008
Ska for Sumatra feat. The Sweetbeats	ska	8.5	6.5			13/09/2008
Jason Molina	pop	13	12			15/09/2008
Annabelle Chvostek	pop	10	8			16/09/2008
Spiers and Boden	folk	12	10			17/09/2008
jason Molina	jazz	12	10			18/09/2008
Hauschka	acoustic	9	7			19/09/2008
Play The Music Acoustic Showcase	acoustic	0				20/09/2008
Transition Norwich presents Jose Ferrera	african	6	5			20/09/2008
Hey Negrita	pop	8	6			22/09/2008
Howlback Hum feat. Horses Brawl	alternaive	4	3			23/09/2008
NO RECOGNISED ARTISTS						

Venue	Carrow Road					
Capacity	26,034					
Event	Event Type	Price £ (cat 1)	Price £ (cat 2)	Price £ (cat 3)	Price £ (cat 4)	Date
George Michael (and sophie ellis-bextor)	pop	100	75	50		12/06/2007
Elton John (and Lulu)						22/05/2005

Venue	Norwich UEA Waterfront					
Capacity	700 capacity					
Event	Event Type	Price £ (cat 1)	Price £ (cat 2)	Price £ (cat 3)	Price £ (cat 4)	Date
CLASSIC LEGENDS OF ROCK TOUR WITH GROUNDHOGS, FOCUS	rock	20				01/10/2008
Roots Manuva Tickets	hip hop	13.5				05/10/2008
CSS	pop	12.5				07/10/2008
SOUTHSIDE JOHNNY & THE ASBURY DUKES	blues	20				08/10/2008
ILLEGAL EAGLES	rock	17.5				09/10/2008
THE METROS	rock	7				12/10/2008
AIDEN	punk	13.5				15/10/2008
YOU ME AT SIX	pop	9				16/10/2008
STIFF LITTLE FINGERS	rock	16				19/10/2008
DAN LE SAC VS SCROOBIUS PIP PRESENTED BY ULIVE	hip hop	10				20/10/2008
BLOOD RED SHOES	punk	8				21/10/2008
MYSTERY JETS	pop	11				22/10/2008
BRING ME THE HORIZON	metal	11				23/10/2008
BELLOWHEAD	folk	16	12			26/10/2008
FLEET FOXES	folk	12				28/10/2008
PAUL HEATON AND CERYS MATTHEWS	pop	16.5				29/10/2008
ROOTS AND CULTURE	Reggae	10	8			30/10/2008
SETH LAKEMAN	folk	16				02/11/2008
FUNERAL FOR A FRIEND	rock					03/11/2008
NOAH AND THE WHALE	pop	8				04/11/2008
OKKERVIL RIVER	rock	11.5				05/11/2008
EDDI READER	pop	19.5				06/11/2008
CLASSIC MANCHESTER NIGHT	indie	10				09/11/2008
GO AUDIO	pop	7				11/11/2008
HALF MAN HALF BISCUIT	rock	16				12/11/2008
THE KILLS	blues	10				17/11/2008
SOILWORK	metal	12				19/11/2008
FISH	rock	17.5				20/11/2008
TODD RUNDGREN	rock	18.5				22/11/2008
JOHN OTWAY BAND	rock	12				23/11/2008
IDA MARIA	rock	8				24/11/2008
SHOW OF HANDS	folk	15				25/11/2008
DREADZONE	electronic	12.5				26/11/2008
WHOLE LOTTA LED	rock	11	9			27/11/2008
NOUVELLE VAGUE	pop	17.5				03/12/2008
BAD MANNERS	ska	15				04/12/2008
LIMEHOUSE LIZZY	rock	12.5				22/01/2009

Venue	Norwich Theatre Royal					
Capacity		1,309 capacity				
Event	Event Type	Price £ (cat 1)	Price £ (cat 2)	Price £ (cat 3)	Price £ (cat 4)	Date
AN IDEAL HUSBAND	Play	20.5	18	16.5	6	08/09/2008
MATTHEW BOURNE'S DORIAN GRAY	Play	28.5	26.5	23.5	6	16/09/2008
POOL (NO WATER)	Play	12				16/09/2008
THE GLASS MENAGERIE	Play	20.5	18	16.5	6	22/09/2008
OVER THE RAINBOW	musical	18.5	17.5	16.5	5	29/09/2008
HALFWAY TO PARADISE	rock	18.5	17.5	16.5	5	30/09/2008
SUPERTROUPERS 08	pop	18.5	17.5	16.5	5	01/10/2008
LA BOHEME AND TOSCA	opera	34	29	25.5	6	02/10/2008
MICHAEL McINTYRE	comedy	16	5			05/10/2008
LA GRAND CIRQUE	circus	28.5	22.5	19.5	6	07/10/2008
VAMPIRES ROCK 08	musical	19.5	17.5	5		12/10/2008
CHARLIE LANDSBOROUGH	acoustic	17.5	16	5		13/10/2008
SALLY MORGAN	Psychic	19.5	18	17	5	14/10/2008
RAMBERT DANCE COMPANY	ballet	21	19	17	5	16/10/2008
DREAM A LITTLE DREAM	ballet	12.5	11.5	10	5	19/10/2008
STEVE COOGAN	comedy	30	6			20/10/2008
THE MOTOWN SHOW	musical	18.5	17	16		23/10/2008
BRITTEN SINFONIA NIGHT MUSIC	classical	25	22	19	6	24/10/2008
STEWART WHITE	chat show	19.5	17.5	15.5	5	25/10/2008
BEAUTY AND THE BEAST	musical	30	28	24.5	6	28/10/2008
DYLAN MORAN	comedy	19	5			02/11/2008
SLAVA'S SNOW SNOW	play	26	20	15	6	04/11/2008
DIONNE WARWICK	pop	35	32.5	6		09/11/2008
CINDERELLA ON ICE	musical	29.5	26	23.5	6	11/11/2008
ROMEO AND JULIET	Play	20.5	18	16.5	6	18/11/2008
GLYNDEBOURNE ON TOUR	opera	48.5	42.5	34	6	25/11/2008
GLEN MILLER ORCHESTRA	classical	16	15	14	5	30/11/2008
FOOTLOOSE	musical	25.5	23	20.5	6	01/12/2008
BRITTEN SINFONIA HANDEL MESSIAH	classical	35	31	27	6	14/12/2008
SNOW WHITE	Play	17.5	15.5	13.5	5	16/12/2008

Venue	Thetford Forest					
Capacity	6,000 capacity					
Event	Event Type	Price £ (cat 1)	Price £ (cat 2)	Price £ (cat 3)	Price £ (cat 4)	Date
Status Quo	rock	30				07/06/2008
Travis	Pop					08/06/2007
McFly	pop					11/07/2008
Katherine Jenkins	pop	28.5				12/07/2008
Crowded House	pop					10/07/2008