

Kings Walk Refurbishment
Feasibility Study
July 2020

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1.0 Introduction

Project Background

In early 2020, Turner Works and Worthwhile Works were appointed to conduct a feasibility study to bring back into use two currently underused buildings in Winchester, The King's Walk building and the nearby multi-storey car park. The buildings are both owned by Winchester Council.

One big impact on this study has been the AV pandemic which has been transforming the way people live, work, and use spaces throughout the duration of this study. As a consequence, the study team have considered potential future scenarios more flexibly, and having to make more assumptions about the future demands than might have been the case previously.

Purpose of this document

This document is a feasibility study.

It is the purpose of this document to analyse and explain the potential, issues, and viability of future proposals looking to transform the King's Walk building, the multi-storey car park, and the surrounding streets in Winchester.

It then explores the opportunity and viability to support established or emerging creative and local businesses with affordable workspace and other supporting uses in these buildings.

Finally it investigates how the buildings, its future tenants, and the surrounding public realm could contribute to increase the quality of life and offer to all of Winchester's residents and visitors.

1.1 Executive Summary

It's time for the old and the new to join hands.

Winchester is so much more than a beautiful façade steeped in heritage. The City is home to inventive and pioneering entrepreneurs that create internationally renowned work. From international textile artist Alice Kettle to Hawkeye inventor Paul Hawkins. From RIBA Award winning architects to award-winning food and drink producers. The work of these businesses and creatives sets Winchester apart as a modern-day heritage city, a place that celebrates its past whilst embracing the future.

Winchester has many qualities – natural beauty; nestled between two national parks; extraordinary heritage; proximity to London; close to the coast; high quality schooling & education. But despite having the highest number of workers in the creative industries of any location in Hampshire – Winchester is not seen by young people (on which its future depends) as a vibrant, creative, affordable, fun, forward-looking place to live, work and play. It is not just young people who feel this way. This report also reveals that the older generation feel strongly that Winchester can and should do more for the younger generation.

Creating an environment that supports independents, fledgling creatives and business benefits everyone – young and old. There is a clear sense that residents feel Winchester is a little stuck and they observe what other towns and cities have done to move with the times.

Winchester has a high proportion of young people, and a large and growing student population, but it struggles to retain that talent. Young workers leave Winchester, seeking employment and excitement in London and other cities. They are priced out by high accommodation costs, prevented from starting their own micro-businesses by a lack of flexible and affordable office space and high retail rents. Young artists leave the city due to a lack of studio space and little infrastructure to support them. Virtually all people – young, old, resident or visitor – view Winchester's retail and entertainment offer as lacking variety with few independent shops compared to other similar sized towns.

Ironically, there is a lot of creative energy in Winchester. It's just hard to find it. This feasibility study looks at how the redevelopment of the King's Walk quarter can create a step change in Winchester's relationship with young people and creative businesses, change the perception of the city, build a home for entrepreneurs, creative employers and independent retail, and be a magnet for a youthful, future-facing creative community.

The study draws upon data and quantitative information from a survey completed by 850 people in a two week window, proving that there is significant support to see change in the city. The study also draws on qualitative information from over 50 organisations and businesses, both local, regional and national.

Our research found:

- Winchester High Street rents are comparable with London's West End
- Over 80% of respondents want to see more independent shops
- Winchester has more creative businesses based here than anywhere in Hampshire
- The perception of businesses is that Winchester is not supportive of the creative industry that exists here
- 100% of students said they would stay in Winchester if they had job prospects
- There is growing demand for flexible desk space since Covid-19 as more freelancers and employees reduce commuting out of Winchester

- 80% of artists felt there was little studio space that met their needs in Winchester and many have moved elsewhere
- Over a quarter of respondents cited a lack of variety in bars and music venues as a reason not to go out more often

Kings Walk Creative Quarter has the potential to act as a bridge between all the different organisations and creative people in Winchester. We believe the Kings Walk site also has the potential to become a Creative Enterprise Zone – a first for Hampshire.

A reoccurring theme with the stakeholder interviews was how disparate the creative community is and not linked to the regional and national creative agenda. A Creative Enterprise Zone (see page 21 for further details) not only supports its occupants, but shares its facilities and services with the wider community and shines a light on the creative talent – from grassroots to established businesses. The site needs a bit of magic to be a long-term success. It also needs partnerships with the right people with like-minded ambition. Our stakeholder interviews revealed that there is no shortage of interested organisations with an eye to operating the site.

Kings Walk Creative Quarter needs to balance being credible, whilst serving the community and being commercially viable. There are a plethora of organisations in Winchester who have sector specialisms but none we identified locally who we believe have the experience or capacity to run the Kings Walk Creative Quarter in its entirety.

The choice is an operator who runs the whole site but could lose the 'Winchesterness' vibe. Whilst a single major operator would offer convenience and likely take on the financial risk, in doing so Winchester City Council would risk losing some control of the strategic objectives of the development.

Alternatively, the site is split into zones, tendering each area to appropriate operators, local or otherwise. Whilst perhaps unable or unwilling to take on the operation of the entire site, a mix of operators would bring specific energy and expertise to individual functions. For example, workspace, retail, arts, food & beverage.

This report recommends:

- Establishing Kings Walk as a Creative Enterprise Zone which will help Winchester City Council deliver on its objectives to support the creative community and attract more business to Winchester
- The Creative Enterprise Zone is managed by a single point of contact to the Council and is well connected in the creative sector locally, regionally and nationally
- The Creative Enterprise Zone team is responsible for filling the site with a credible mix and ensures operators fit with the overall ambition and agenda of Kings Walk as a creative quarter



1.2 Turner Works

Turner Works are a multi-disciplinary team of architects, urban designers, thinkers and makers. We worked with Winchester City Council on the recent feasibility study for the Bus Terminus site, so know the place and people quite well. We are teaming up again with local movers and shakers Worthwhile Works who will be assessing local demand essential to underpin any proposed uses, especially in such uncertain times.

Turner Works also have unique experience in designing, building and operating similar buildings and places, with a mix of end-uses and complex business models, on a temporary or ‘meanwhile’ basis. These have all been in partnerships with Local Authorities. We are now deploying this meanwhile approach to whole towns such as Newhaven and Weston-super-Mare, advocating a step-by-step approach culminating in a micro-plan; An alternative master-plan where many small interventions can be seen to have a large cumulative effect.

Our third London meanwhile project at Clarnico Quay is nearing completion on site, and is a new build but temporary mixed use, affordable incubator campus. We have recently completed a conversion and refurbishment of a range of building called Coach Works in Ashford, Kent in partnership with the council. We took this through feasibility, planning and construction and we have now set up a local operation company to look after the site for at least five years.

We really like the buildings at Kings Walk and look forward to the challenge of unlocking the potential of both the buildings and the people of Winchester.

We are all about delivery and getting the job done.

Photographs starting from the top left: Slip House, Stealth Barn, Pop Brixton, Peckham Levels, Clarnico Quay, Mountview Academy



Kings Walk Winchester Feasibility Study



Peckham Levels Spaces

1.3 Worthwhile Works

Worthwhile Works is a creative, cultural, live events and arts development practice with a clear civic conscience. We imagine a society where creativity and culture are the beating heart of everyday life, education, employment and the engine of a thriving economy.

We are strategists and project managers, with extensive experience in the creative and cultural landscape, with over 25 years' experience creating and delivering cultural strategy for major organisations from the Mayor of London to running some of the UK's biggest events for the BBC.

We are exceptionally well connected with the creative and cultural community both in Hampshire and the wider UK. We work with everyone from major institutions, organisations and businesses to creative grassroots, students and local communities, helping to further their growth both economically and for the social good.

In 2019 Worthwhile Works first partnered with Turner Works to deliver a feasibility study for Winchester City Council for the a meanwhile use site in the city centre, while more recently we have completed a major piece of research into the heritage sector for University of Portsmouth.

In addition to strategic work in the public realm, we have extensive experience in the planning, marketing and delivery of live events and activations, with current projects including the inaugural Winchester Design Festival plus the development of two new international sports and music festivals.

Previous and current clients include Amazon, Craft Sportswear of Sweden and Play Sports Network.

2.0 Market Analysis

2.1 Introduction

Creatives are ‘placemakers’ by instinct: when creatives cluster in an area, they infuse it with energy, build social and business networks and contribute to its vibrancy and distinctiveness. There is nowhere in Winchester that serves that purpose.

Kings Walk could provide the answer.

There is no shortage of talent in Winchester, but it is spread in small isolated pockets, reducing visibility and creative potential.

Kings Walk can help shine a light on the creative and entrepreneurial talent here and more. It can act as a beacon to the wider creative community and help to support, nurture and build a stronger creative neighbourhood. One that is not only good for our society, but built to be economically robust too.

The secret to success is not only great design, it lies in working with the right partners and operators – ones that believe in the vision and believe in the future of Winchester. The right partners will help Kings Walk thrive.

The stakeholder research and online survey show that Winchester residents, students, businesses and organisations would welcome a Kings Walk creative and cultural quarter.

Let Kings Walk give Winchester the creative jolt it needs.

2.2 Method

Worthwhile Works undertook a period of research into the workspace, retail, creative industries, student and young persons, entertainment and food & beverage markets in Winchester and the wider region.

There are three parts to the research:

- Anonymous online survey
- Desk research
- Stakeholder interviews

The three methods used produced a mix of qualitative and quantitative data that provide the basis of this report.

Survey

Full results of the survey can be found in the appendix.

The survey questions and content were agreed with WCC. In just two weeks we recieved over 850 responses. The survey was open to anyone but with a particular focus on targeting the following key audiences:

- Young people
- Students
- Businesses
- Retailers
- People working in creative, arts, entertainment

The survey was distributed to a mix of social media networks, forums and groups, mailing lists and word of mouth. We estimate that the total potential audience reach across all networks totals approx. 50,000 people.

Key networks included:

- Winchester Design Festival
- City of Winchester Trust
- Local & Regional Facebook Groups
- LinkedIn
- The Yard
- Hampshire Fare

- Winchester BID
- Winchester School of Art
- Winchester University
- Westgate School
- Kings School
- Peter Symonds College
- Creative Network South
- Business South Stakeholder Group
- Winchester City Council Regeneration Mailing List
- Railway Live

Stakeholder interviews

A full stakeholder list is included in the appendix. We conducted a series of telephone, video and face-to-face interviews with key stakeholders who we identified and agreed with Winchester Council as potential operators (or competitors for) space within the Kings Walk Quarter. This included local, regional and national businesses. The stakeholder interviews were intended to provide richer insight and qualitative information about the realities of working and operating in Winchester and also had the intention of building a greater understanding of likely demand for the space.

Please note that we have kept the feedback from the stakeholders anonymous as information was considered commercially sensitive.

Desk Research

Analysis was conducted on retail and office rents in Winchester, plus a comparison with London W1, Southampton, Salisbury, Basingstoke and Guildford. Full details of this comparison is included in the appendix.

2.3 Context

Winchester is a place with heritage running through its veins and a pounding creative heart.

Whilst its heritage is world famous – from the birthplace of the English Language, the resting place of Jane Austen and the home during King Alfred's rule – the contemporary creative scene is relatively undiscovered.

Perhaps it is not an obvious place to think of design, architectural or digital excellence compared to other parts of the UK.

But it is here. In abundance.

Some of that talent is world class.

It is a little-known fact that there are more creatives working in Winchester than any other part of Hampshire – 5,500 people to be exact.

Truth is, people are just too busy getting on with making, planning, producing, inventing, creating and dreaming to really shout about it.

The sector is fragmented. Winchester's published cultural strategy expires in 2020, there is no overarching body representing the sector and the Council have limited resources.

Which means opportunities are lost, particularly with younger people looking to get a break – 100% of students we surveyed say they would stay in Winchester if there were more career opportunities

And it isn't just the creative scene that has potential. The food and drink scene here is blossoming with many brands launching at local farmers' markets. Hampshire Fare has over 400 members, and the Hampshire Street Food scene is thriving. The street food scene in the UK is worth £1.2billion.

Other cities are driving forward their cultural growth with ambition, appealing to young professionals, families, inspiring youth and encouraging multi-generational mixing through engaging community activity.

The time is right for Winchester to do the same.

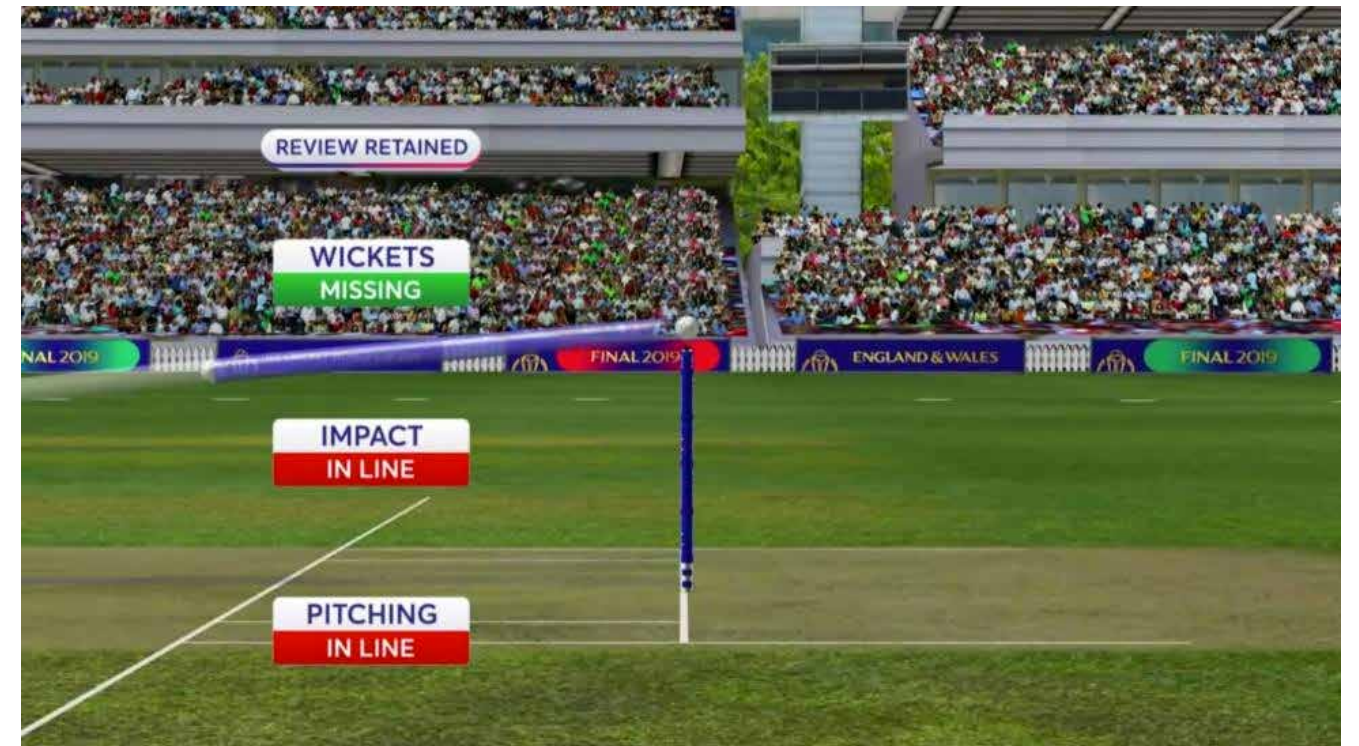
The Council has been working hard behind the scenes to build a long-term strategy for the City Centre and they support the view that creativity and culture should be at the heart of the Kings Walk area, a place ripe for regeneration.

There is appetite for change and an audience willing for it to happen. Over 800 people replied to the Kings Walk survey in less than two weeks. A mix of business, retail, residents, cultural organisations, students and young people. That's over 1 in 100 people living here – a fair representation of the voice of Winchester.

Whilst not everyone can agree on what they want – ideas ranged from a surfing dome to a chamber music hall, they do all agree that they want to see progress on the old Silver Hill site and the idea of turning Kings Walk into a creative and cultural hub has got them excited.

The city has been waiting a long time.

It may not need to wait much longer.



Local inventor Paul Hawkins invented the goal line technology used in Wimbledon, Premier League and Test Cricket and now Hawk Eye Innovation have offices around the world



Winchester is home to great brands. The UK is the top exporter of Gin around the world and Hampshire Gin was named the best London Dry Gin in the World Gin Awards 2020

2.4 Why does Winchester need a creative / cultural quarter?

Let’s start by saying two things:

First, that the importance of the creative industries cannot be overstated.

And second, that many of those creative industries have been knocked off their feet by COVID.

But as the saying goes, the harder the conflict, the more glorious the triumph.

Creativity is Britain’s fastest growing export and the fastest growing part of the UK economy. The figures speak for themselves. In 2018 the sector contributed £102billion GVA which is bigger than the automotive, life sciences, aerospace, oil and gas sectors combined.

Creative skills and services such as software, architecture, design, and advertising allow businesses – from aerospace to construction – to improve their products, boosting long-term productivity in the UK. For example; In Hampshire, there is high demand for digital and design services in the maritime industry which employs over 120,000 locally and generates £5.5billion.

CREATIVE INDUSTRY DEFINITION:

- Advertising & Marketing
- Architecture
- Crafts
- Design (Product, Fashion, Graphic)
- Film, TC, Video, Animation, VFX/SFX, Radio & Photography
- IT, Video Games, Software & Computer Services (creativetech)
- Museums, Galleries, Libraries & Heritage
- Music, Performing & Visual Arts
- Publishing

Source: DCMS

There are more than 284,000 businesses in the creative industries, which account for 12% of all business in the UK and 6% of the UK economy. Creative industries are driving economic growth across the UK, on track to create one million new jobs by 2030. That’s almost 1 in 8 jobs.

Whilst the creative industries are concentrated in London, there has been significant economic growth in the sector in the regions – especially in Hampshire which has seen 30% growth in the last five years.



Stakeholder Insight:

“The idea of a creative quarter is EXACTLY the kind of thing that you should be doing. One of Winchester’s unique, unexploited strengths (compared to nearby towns) is that we have two universities, one of which is heavily concentrated on the arts. All these creative students should be integrated into the town much more, and their work made a visible part of the town centre’s offer. Give them very cheap space in this area to be creative – during their degrees, but also encouraging them to stay afterwards and continue to contribute to the town”

2.5 Life post-lockdown

The sector is starting to make slow steps towards recovery from COVID-19. Opportunities are already starting to emerge.

COVID-19 has created a shift in working patterns. Remote working will see less people commuting, especially into London. Facebook have already announced they expect half of their staff to work remotely – permanently. Which means more demand locally for space and skills.

Stakeholder insight:

“We have had a surge in interest in our workspace since lockdown restrictions were eased, both from individuals wanting a space and corporates looking to downsize their central London premises and offer staff the chance to work more regionally.”

The take-up of digital services has been staggering over the last few months. Just look at the number of Zoom users, which rose from 10 million in December to 300 million in March.

Stakeholder insight:

“I truly believe that Winchester is lacking a creative hub.”

During lockdown local creatives have either kickstarted their digital offering or developed their existing offer. Take Jennie Maizels, a successful local book illustrator, with over 12,000 followers on Instagram. Her online Sketchbook classes are in high demand around the world especially through lockdown. Charging a small fee for downloadable classes, she generates a healthy regular income from online subscriptions, all from the comfort of her home studio.

“I work on my own as a visual artist. I don’t mix in techy circles. But if I worked in a community where I could easily access support and learn from others, I would be there like a shot. I’m desperate to build a digital strategy and commercialise my talent, I just don’t know where to start. A Kings Walk creative hub could be great for my business”

Through necessity, designers, architects, visual artists, performing arts and a whole host of creatives are now collaborating digitally throughout the UK and across borders as never before. Kings Walk can provide a space for businesses from all sides of the creative spectrum to interact with one another.



Stakeholder insight:

“I’m setting up Winchester Design Festival to shine a spotlight on the creative talent here and provide a hub for the creative community to network – few opportunities for that to happen currently exist.”

2.6 Winchester’s Creative Scene

You don’t have to look very hard to find culture in Winchester.

- 14 military museums
- A world-famous Cathedral
- An amazing Hat Fair
- A thriving library loved by many
- 150 year old Winchester School of Art
- Winchester University creative departments

So why does Winchester need a cultural quarter? What is missing?

Creatives are ‘placemakers’ by instinct: when creatives cluster in an area, they infuse it with energy, build social and business networks and contribute to its vibrancy and distinctiveness. There isn’t anywhere in Winchester that serves that purpose and brings the whole creative community together.

The creative community is spread across Winchester in small isolated pockets which reduces visibility and restricts its creative potential. Many people have commented that it is ‘hard to access’ the creative community.

But it is here.

There are more creatives in Winchester than anywhere else in Hampshire:

Winchester	5200
Rushmoor	4700
Basingstoke & Dean	3700
Southampton	2400
Hart	2300
Eastleigh	2400
Portsmouth	1900
East Hampshire	1800
New Forest	1700
Test Valley	1700
Fareham	1500

Source: NESTA/PUSH/CNS Creative employment (jobs) in Hampshire

According to NESTA¹, there are more architects working in Winchester than any other city outside of London – 500 in total.

There are over 20,000 students studying in Winchester.

It is home to creative excellence with clusters of architects, digital and design expertise.

But it is not all good news. 13% of children live in poverty in Winchester, over a hundred (official) homeless and its Victorian prison faces significant issues with overcrowding.

Pre COVID-19 there were more tourists than ever before, more students, more coffee shops and certainly more barbers. And yet over recent years many much loved independent shops have disappeared. Maxims, Wilds, Park Life, Earl of Sandwich and Caracoli to name a few – with all blaming high business rates and high rents.

Our analysis shows that Winchester has significantly higher rents per square foot than any of its closest neighbours, and that – in some cases – rents on Winchester High Street are higher even than prime retail areas in London W1. This, coupled with (and in part because of) a comparatively compact town centre and corresponding lack of retail space, means that Winchester has a low proportion of smaller and independent retail businesses and a lack of variety.

Stakeholder insight:

“I was born and raised in Winchester and believe firmly that there is a unique creative community waiting to for a turn in the spotlight. Those of us who haven’t given up (and moved to more thriving/ supportive creative cities) have been tucked away in the shadows for too long!”

Culture is an essential ingredient in the 21st century and no city can be successful without it. Local authorities around the country weave culture through all aspects of urban policy, like a golden thread, contributing to city reputation, economic prosperity and quality of life.

The Kings Walk survey and stakeholder conversation revealed:

- A lack of affordable retail rents for fledgling and independent brands
- A lack of seated space to hang out whilst enjoying street food and casual dining
- Few entertainment venues or activities for young people
- Demand for a covered market area
- No contemporary art gallery in the town centre
- Little flexible studio space for artists, makers, wellness and other small businesses

- Little office space on offer for the creative community
- No creative hub offering specialised business support
- No small central live music venue or rehearsal space
- No street art
- No hub for festivals to operate from during their events



Stakeholder insight:

“There is a lot of highbrow culture which is wonderful but Winchester could do with mixing in more contemporary, street and youth culture. It’s not about choosing one over the other, it’s about not forgetting the whole spectrum of community here. It feels a bit one-sided.”

Creativity in action: examples from creative towns and cities around the UK



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FROME INDEPENDENT SCENE

“Loads of market stall traders from the hugely successful Frome Indie Market have gone on to run their own indie shops because the rents are affordable. Frome really supports an indie culture.”

Artists resident at Phoenix Brighton MAY 2018				
Michelle Abbott 2N6	Curious Space B52	David Harkins 1N5	Paul Morley B53/4	Jenny Staff BC1
Sophie Abbott 2N8	Alex Currie 4C3	Milo Hartnoll 3N6	Kulo Murugaiyan 1N2	Kiki Stickl 3C2
Dominic Allen 259	Matt Davis B53/4	Denise Harrison 1N7	Clare Nias 4N5	Alice Stewardson B53/4
Kay Aplin B51	Amanda Doughty 4N4	Tom Heatley 2C2	Patrick O'Donnell 1N6	Mike Stoakes 251A
Karen Barratt 154	Anna Dumitriu 357	Caitlin Heffernan 154	Suzanne O'Haire 452	Kate Strachan 4N6
Emily Beaumont B55	Paul Duttall 3N7/8	Oliver Hein 3C2	Manel Ortega 257	Nicki Tarr B55
Katy Belnart 1N3	Mike Edwards 3N1	Fergus Heron 359	Dan Palmer 252	Eve Claire Taylor BNS/6
Carolyn Bew 2C3	Keith Esdale 354	Rod Hook 1C1	Natalie Papamichael 2N4	Antonia Thompson 255
Natasha Bidgood 352	Stig Evans 4N2	Nik Hope BN1/2	Rowena Park 1510	Maria Tillyard 353
Becky Blair 455	Denise Felkin 256	Julian Howell 4C1	Warren Pleece 1N2	Liz Toole 153
Polly Blake 4C3	Claudia Fontes BN4	Steve Howkins BN3	David Price 4N1	Sandra Twine 258
Ian Boutell 1N2	Jane Fox 3N11/12	Mick Jackson 4N3	Wendy Pye 3N2	Christina Ure 1N4
Edward Briggs 1N2	Steve Fricker 4N8	Emma Johnson B53/4	Carol Quinn 358	Joshua Uvieghara 453B
Louise Bristow 1N1	June Frickleton 2N7	Emily Jolley 3N4	Megha Rajguru 251B	John Varah 157
Lucy Brown 258	Valerie Furnham 1C3	Philippa Karakashian 1N9	Allan Ramsay 3510	Julian Villarrubi 450
Jon Carritt 252	Sarah Gardner BC1	Dinah Kelly 2510	Ruth Rix 2N1	Ember Vincent BNS/6
Marion Charles 2C1	Emily Gardiner 3N13	John Kelly 158	Rocket Artists BLUE ROOM	Juliet Walters 4N7
Zoe Clare 1C2	Andrew Gifford 2N2	Sue MacLaine 3C3	Dagmara Rudkin 356	David Watson BC2
Michelle Cobbin 1N8	Jonathan Gilhooly 159	Luella Martin 155	Tania Rutland 3N10	Russell Webb 3N9
Rachel Cohen 2N5	Mary Goody BC1	Nelson Mella 355	Semiconductor 2N3	Simon Wilkinson 3N7/8
Philip Cole 451	Linda Grieve 1N10	Bernard G Mills 253	Eve Shepherd 156	Alice Wisden 254
Jim Cooke 4C2	Ottillie Hainsworth 2510	David Scott Moore 3N3	Perdita Sinclair 3N5	Joseph Young 3511
Emma Critchley 454	Clare Hankinson 4C1A	Karin Mori 3C1	Veronica Slater 453A	Dawei Zhang BN3



FOLKESTONE CREATIVE QUARTER

“Have a look at the Creative Quarter in Folkestone – beautiful shops and very busy, a destination in themselves.”

PHEONIX BRIGHTON

“At Phoenix Brighton we value artistic process above everything else, which gives our building a very particular energy. The whole building is a creative powerhouse”.

2.7 Survey Analysis

Our Feasibility Study work concentrated on assessing the needs of the following key audiences:

- Businesses and office space
- Studio space – including artists, wellness, rehearsal space etc
- Exhibition space, especially art students
- Retailers
- The arts, music and entertainment industries
- Students
- Young people who live or work in Winchester

However, the survey was also open to anyone with an interest and saw a significant engagement from other residents who did not fit into the categories above.

In total we had c.850 responses to the survey in two weeks – a statistically significant sample (over 1% of the city’s population), which also suggests that there is a demand and depth of feeling about creating positive change in the city. This is clear in the open text comments at the close of the survey (full list in the appendix), which were very positive about the need for change, and in many cases critical of the perceived slow rate of progress in the city.

For this document, we’ll outline responses from each of the key audiences above, and then conclude by offering an analysis of the responses from the wider population.

2.7.1 BUSINESSES & OFFICE WORKERS

The survey responses reinforce our research that creative businesses are a key part of Winchester’s economy, with nearly a third of our sample working in that area. Most of those surveyed work on their own or in micro businesses and would welcome working with similar businesses. A challenge with existing workspaces in Winchester is a lack of meeting, social and private spaces (in part due to the price, size and nature of property here). This could be a key advantage of the Kings Walk space – we believe that well-designed, flexible work and social space will be an attractive proposition.

Unsurprisingly given the small size of the majority of businesses who responded price is an issue. Workspace is a competitive market and the building will need to function – at worst – in line with established pricing for this market. Encouragingly, some workspace providers from Winchester and the surrounding region who we spoke to reported that they were oversubscribed, however others reported that they were operating with space unfilled. Our benchmarking for desk and office rents in mixed workspace is below.

There is uncertainty over the impact of COVID-19 on the future of the workspace market. It seems reasonably clear that there has been a step change in ways of working, with many workers reporting that they are now able to work from their homes (or hometown). It remains to be seen is this is a short-term change or a more generational shift. However, workspace operators we spoke to reported that they are seeing an uplift in interest in regional working from those who would previously have been commuting to larger offices.

We saw strong interest from a number of workspace operators in taking on the management of the Kings Walk workspace, and our view is that there would be competition for the contract to operate.

Office Rent Benchmarking @ 08/07/2020

Location	Price per sq ft / year
Jewry St	£14.64
Southgate St	£20.40
St Georges St	£24.48
The Square	£15.36
Southgate St (serviced office)	£43.20
Staple Gardens	£19.68
High St	£32.40

Survey insights:

- This sample was relatively small – 5% of responders
- The majority were micro businesses and solo operators, but a significant proportion (29%) have more than 12 employees
- Creative businesses made up nearly a third of all responses
- 41% are looking for office space in Winchester, 75% citing expense as the main issue preventing them from finding the right space in Winchester
- 65% only need 1–3 desks
- Meeting and social spaces are a key attraction
- A majority of responders wanted to work alongside creative businesses and entrepreneurs
- The market is price sensitive, with over half of responders only able to afford a maximum of £150 per month

Pricing recommendations:

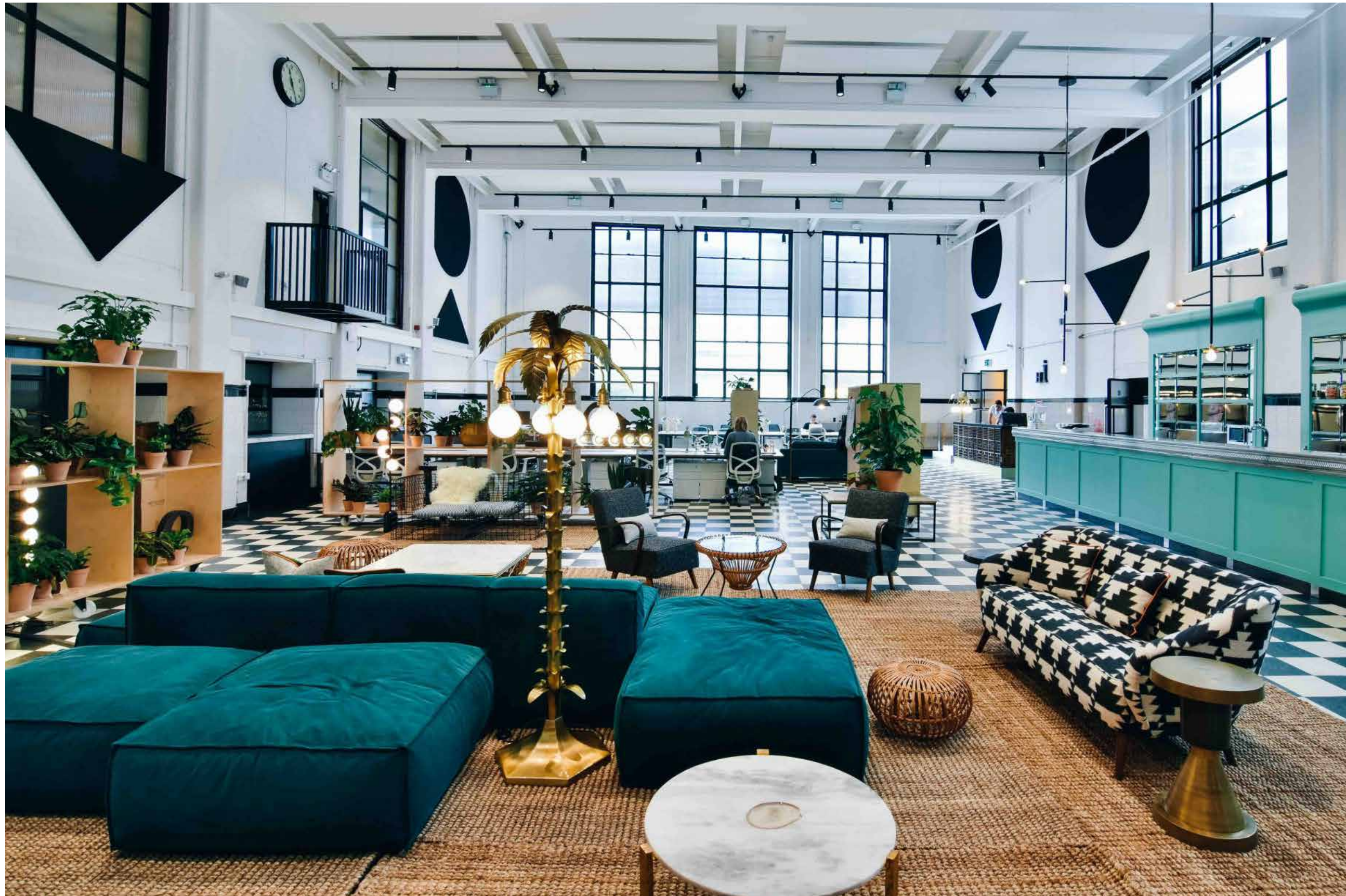
Hot Desk	£175 / month
Permanent Desk	£300 / month
Office Space (Incubator – 1–4 person)	£400 / pp / month
Office Space (Established – 5 person +)	£500 / pp / month

Workspace Price Benchmarking @ 08/07/2020

Operator	Location	Hot desk	Permanent Desk	Office
Incuhive	Winchester	£120 pcm	£300 / month	£300+
Workshop	Winchester	£100 (5 days / month)	£300 / month	N/A
Basepoint	Winchester	N/A	£179 / month	£700 (2 persons / 11 sqm)
Hampshire Work-space	N/A	N/A	N/A	£600 (1–2 person) £720 (2–3 person)
Village Hotels	Bristol	£20 / day £75 / month	N/A	N/A
This Work	Bournemouth	£20 per day	£300 / month	£300 pp / month
Barclays Eagle Labs	Southampton	£25 / day £200 (10 days / month)	£300 / month	£1200 / month (4 person)

Stakeholder insights:

- Since Covid-19, there has been picqued interest in desk space from former daily commuters
- Clients do not just want a ‘desk’ they want extra services as part of their rental agreement
- Village Hotels offer gym membership, reception, catering, ample meeting space as part of their package – a new trend in co-working
- The price of co-working space is dropping as more operators come into the market
- Of the providers we spoke to, there was much interest in operating Kings Walk from local, regional and national workspace providers. Several providers said they have been interested in Winchester for a while but the right space has not materialised, however Kings Walk as a creative quarter was the kind of place they were very interested in
- If it is to be a truly creative hub, it needs appeal to a creative audience and not feel too bland or corporate.



THIS WORK, BOURNEMOUTH

2.7.2 STUDIO SPACES

Artist / Design / Maker studios

Both our survey and face-to-face conversations have given a clear indication that Winchester is lacking in artists and creative studio spaces. What provision there is in Winchester is basic and lacks facilities (including heating), and demand currently outstrips supply. This is unsurprising, given a lack of industrial spaces, and Winchester’s high rents. It is our view that studio space provision within the Kings Walk space would be in solid demand.

The lack of existing studio, exhibition and retail space also means that there is no focal point to bring Winchester’s creative and practicing arts community together – a significant number of responses to the survey expressed an interest in both exhibition and retail spaces in addition to studio space rental. This could be an interesting option for the proposed ‘urban room’ to function as a curated gallery space for artists with the community.

Many artists have portfolio careers – they make, they sell, they teach. One designer-maker said:

“20% of my time is spent creatively, the rest is running a business, marketing, selling, teaching. I wish I could be in a space that was part studio, selling space, somewhere to teach. I have fulfilled over 10,000 orders online and I would love to mix with like-minded businesses – I’m sure there are economies of scale if we worked together in the same building. We could negotiate better rates with local suppliers.”

Artist Studio Price Benchmarking:

Pricing for studio space – as with workspace – is sensitive.

Winchester’s only current offering, The Yard, is £55 per month for a 3x x 3m cubicle – but this does not have any facilities at all, other than a shared kitchen.

The Sorting Office in Eastleigh charges £125 per month and offers some basic business support and showcasing opportunities in addition to cubicle studios.

Pricing recommendations:

Cubicle 3m x 3m	£150 / month
Studio 4m x 5m	£300 / month

Overall survey Insights:

- 7% of responders were looking for, or working in, studio space
- A significant majority of respondents (72% in total) worked in Arts and Crafts or Design
- 83% were solo workers
- 56% of those who responded were looking for studio space in Winchester
- 80% of those people had not found studio space in Winchester that met their needs, citing expense, lack of studios and poor facilities at the limited existing provision
- Over half of respondents would need under 20sqm space
- More than half need ‘wet space’ (for example artists and sculptors)
- Exhibition and storage space are desirable
- A large majority (71%) would want leases of over 12 months
- The market is price sensitive, with 72% able to pay a maximum of £150 per month

Stakeholder insights, Artist Studios:

- Many artists (some internationally recognised) have bypassed Winchester or left because of lack of studio spaces
- Winchester School of Art would support the provision of studio space in the town centre
- Lots of artists cite Cockpit Arts in Deptford as the model by which they would wish to operate from
- Artists supplement their income by teaching workshops and say a teaching space within a studio complex would be desirable
- A dedicated retail exhibition space to show and sell work from is lacking in Winchester.

Survey insights, Wellness / Fitness studios:

There was a small response to the survey from wellness and fitness providers, so we cannot draw any significant conclusions from the survey data.

However, we have spoken with wellness and fitness businesses in the area, and we understand that while Winchester has a number of established medium size businesses and practices (including gyms and chains), there is potential demand for a flexible, hireable studio suite of treatment rooms and larger spaces for individual operators (physiotherapists, aromatherapy, personal trainers), either as a consortium of small businesses or as individuals.

A number of Winchester practices operate from their homes, in part due to the lack of available space.

Stakeholder insights Wellness/Fitness Studio:

- Wellness/Fitness is very popular in Winchester and is increasingly in demand with young people who prefer a holistic, healthier lifestyle
- There has been an increase in start-up wellness/fitness businesses in Winchester over the past few years
- Wellness operators in Winchester are a tightknit community and supportive of one another

- There has been previous attempts to create a ‘consortium’ of wellness providers to operate from one premises for flexible use but no suitable space was found
- Wellness providers say there is a lack of facilities and storage (changing/toilets/equipment) in current premises (Discovery Centre, River Park Recreation Ground) and these would be welcomed

Wellness Studio Price Benchmarking

Name	Location	Per Hour	Per Week
Eastleigh Therapy Room	Eastleigh	£35	£150
Health Optimising	Hursley	£20	n/a
No 12	Eastleigh	£10	n/a
Therapy Room	Stockbridge	£15	n/a

Music studios

While many of those responding to the survey did not identify themselves as musicians in this section of the survey, we saw a stronger response in the ‘Arts, Music & Entertainment’ section. The needs of the music community are outlined in that section (below).



Peckham Levels

2.7.3 RETAILERS

Retailers made up the smallest segment of survey responses, with just under 2% (around 10 responses). As such, caution should be taken when interpreting the survey results – however as each respondent is a practicing retailer, their views remain relevant and important.

For all retailers, the greatest concern is the lack of retail space in Winchester, and the price of the existing space. We have benchmarked the rents for retail properties currently available in Winchester with similar properties in the main shopping areas in other cities and towns in the region (Salisbury, Southampton, Basingstoke and Guildford) and with prime locations in London W1. We have found that Winchester rents are not only significantly higher than the rest of the region (on average twice as high as Salisbury, a relatively affluent cathedral city of similar size) but in many cases comparable with central London rents.

For example, the Whittard’s shop on the High Street is currently available at a rent of £15.28 per square foot – around twice the rate of a similar property on Newburgh Street in the Carnaby Street shopping area, and close to the rate for a prime location currently available on Oxford Street (priced at £18.84 per square foot).

While these high rents are clearly driven by a lack of available retail space (and corresponding high demand), plus Winchester’s status as a comparatively affluent county town, it has had the effect of driving smaller independent businesses out of the town, reduces variety and damages Winchester’s brand.

Our survey responses from residents, students and young people clearly showed that Winchester’s shopping experience is considered to be unsatisfactory – with ‘poor range of shops’ unanimously cited by all groups as the main reason they don’t visit Winchester more frequently at the weekend, and a desire across the board to see more independent shops in Winchester.

Our recommendation would be for the Kings Walk quarter to prioritise a curated retail offering, with low rents and short leases available, and with a brief to prioritise new, local independent businesses that add to Winchester’s retail and cultural mix.

Survey insights:

- The businesses who responded were all physical stores, with one exception
- There was interest in pop-up and short-term property, with lack of suitable space and expense of rents cited as the main reason for not operating in Winchester
- Footfall and price are cited as the main concerns for the location of any new shop, and display frontage is also a priority – which is significant for the current limited and rather hidden retail offering at Kings Walk

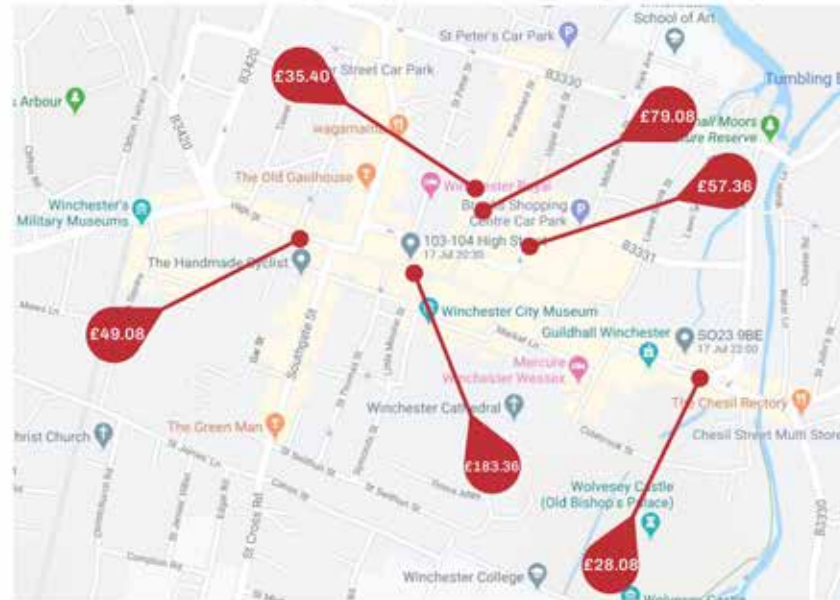
Stakeholder insights:

- We spoke to three much-loved independent businesses that closed their premises in the last two years. All claimed their sales were consistent and increased over the trading life of the shop but their bottom-line costs had gone through the roof and were unsustainable
- One retailer on Parchment Street said that St George’s Street is popular for independent shopping with locals but doesn’t attract tourists **‘as the one-way system slices the town in two’**
- One retail brand aimed at young people/students who is currently on the high street market says that he wouldn’t open a store because **‘There is no critical mass of brands like mine and that’s what I would need to generate footfall so a creative hub would be very appealing’**
- Another youth brand based on Stockbridge Road said that there is a critical mass of students passing their shop which provides good trade and said **‘There is nowhere in town where kids hang out really, apart from McDonalds’**
- A fashion retail brand says they gave up looking for premises with street access because **‘The Winchester rents were the same as Oxford Street.’** They decided to open a store in Bournemouth instead
- Winchester School of Art operate a graduate shop on the premises once a year and occasionally have a temporary shop in town (Brooks) but say lack of footfall is problem. WSA are keen for students to have a larger retail presence in the town centre in affordable premises

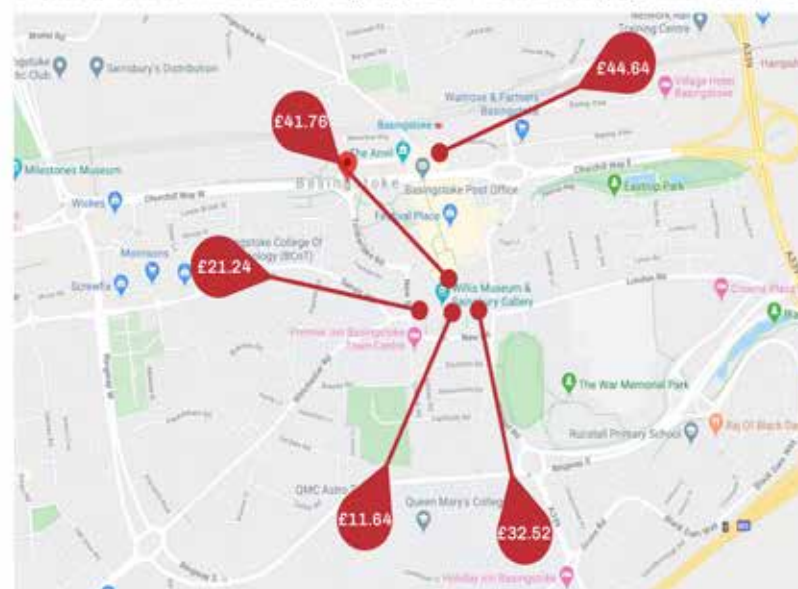


Retail Rents Benchmarking – Maps

WINCHESTER RETAIL RENTS @ 08/06/2020 • ALL RENTS: £/SQUARE FOOT/YEAR



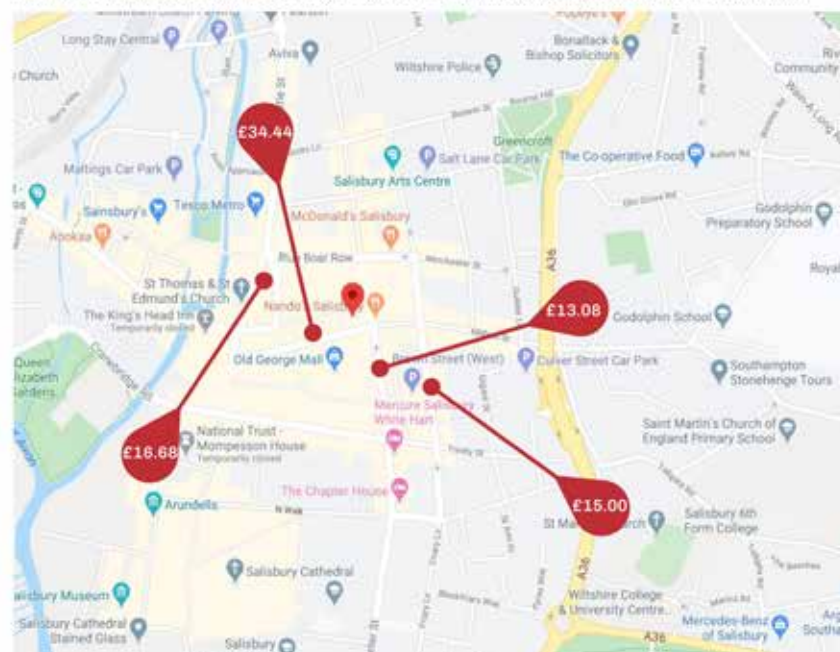
BASINGSTOKE RETAIL RENTS @ 08/06/2020 • ALL RENTS: £/SQUARE FOOT/YEAR



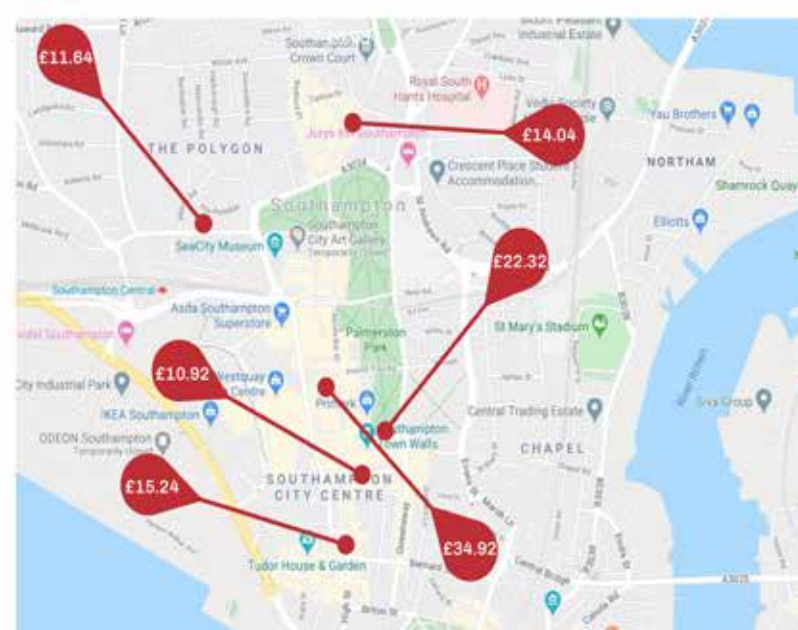
GUILDFORD RETAIL RENTS @ 08/06/2020 • ALL RENTS: £/SQUARE FOOT/YEAR



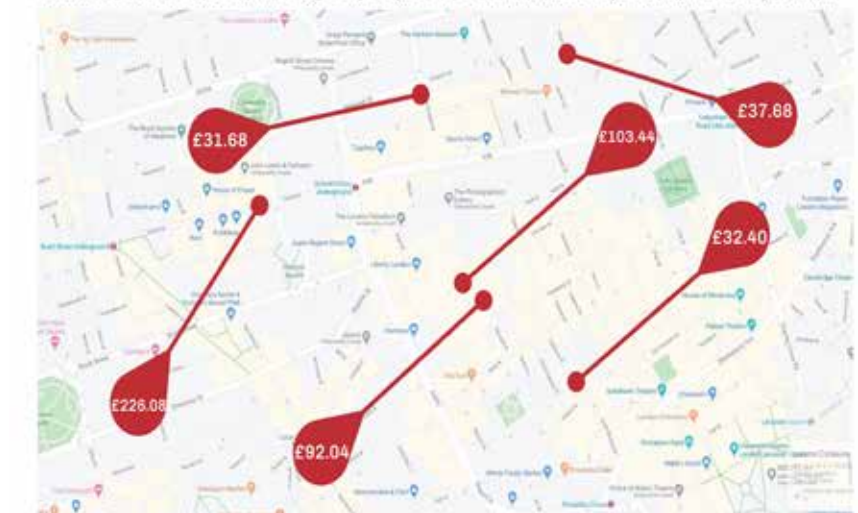
SALISBURY RETAIL RENTS @ 08/06/2020 • ALL RENTS: £/SQUARE FOOT/YEAR



SOUTHAMPTON RETAIL RENTS @ 08/06/2020 • ALL RENTS: £/SQUARE FOOT/YEAR



LONDON W1 RETAIL RENTS @ 08/06/2020 • ALL RENTS: £/SQUARE FOOT/YEAR



2.7.4 ARTS, MUSIC & ENTERTAINMENT

The survey saw a strong response from the arts sector, indicating an encouraging level of demand. Of the 10% who identified themselves as working in arts, music and entertainment, nearly three quarters said they are looking for the right space in Winchester. This strongly suggests that the planned use of the Kings Walk Quarter to serve and attract the local creative community will meet a genuine need.

We saw a very disparate sample of careers and occupations responding to the survey, showing the breadth of Winchester’s creative community. The majority are solo operators and micro businesses, with many seeking desk / workspace within a suitable creative community and environment, but we also saw a number of requests for studio and performance space.

There is a case to be made that Winchester could benefit from a modern, flexible rehearsal and performance space, which could meet the needs of a number of sectors – live music, choir, classical / chamber music, drama and dance. While the classical music community is well served by performance spaces in churches and religious buildings it does not have an acoustically suitable performance space for some performances; and while the grass roots community in dance and drama are served by organisations including the Nutshell, there is a lack of an upward chain to bridge the gaps between the grass roots and the larger venues in the town (Theatre Royal, Guildhall).

Similarly, in popular music the Railway Inn provides a small live music space (150 capacity), but there is then a significant leap to the Guildhall and Winchester University Student Union. In addition, we have had feedback from local music promoters that while they feel there is sufficient demand in the city for more live music, there is not a small to medium size venue to host it. We have also spoken with Boomtown festival, who historically have struggled to find suitable venue space for their outreach activities, which require spaces of up to 300 capacity for family workshops.

Late night venue options are also limited in Winchester. Overdraft bar offers DJ music and craft ales with a small capacity, and Vodka nightclub and Alfies offer late night music to a more mainstream crowd.

A number of operators have expressed an interest in the potential entertainment spaces that could be developed as part of the Kings Walk Quarter, including both permanent and meanwhile use spaces. All operators we spoke to felt that there was untapped potential in Winchester’s music and nightlife, in part due to lack of venues, but also due to a lack of events and programming for young people.

Our view is that a ‘virtuous circle’ could be created through the opening of new spaces, and that Winchester’s promoters will welcome new spaces to fill, and that any new venues or spaces need to be designed with flexibility at their core, in order to serve the varying needs of the community.

Urban Room

Winchester is home to over 40 festivals and events each year. From food, to film to poetry to design. Winchester BID runs the Winchester Festivals Forum which gives organisers a chance to share ideas, best practice and concerns. Many of the festivals do not have a permanent presence in the town centre as they don’t need one. However, many have expressed the need for a small permanent ‘base’ for the duration of the festival which could act as an information point, an exhibition space and a place to host small talks.

Survey Insights:

- 10% of all responses identified as being part of these sectors, our highest split outside general Winchester resident responses
- Wide mix of occupations and specialisms – very strong representative sample
- Nearly three quarters of all responses have less than three employees
- 72% of those surveyed don’t currently have workspace in Winchester – but 70% of those people would like space, if the right space was available
- Many of the responses want studio space; a significant number (47%) are interested in exhibition space and in gallery space (29%)
- It is possible that the music and performance community have had their preferences divided across a number of answers in the ‘What type of space do you need?’ question. Together the responses for ‘Performance Space with Seats’, ‘Performance Space without seating’, ‘Rehearsal Space’ and ‘Recording Studio Space’ total 64% of responses
- While a majority of those who responded wanted permanent space (46%), nearly a quarter were interested in pop-up space

- Performers and organisers in the classical and choral scene said that while there is a definite market in Winchester, there is not a venue suitable for secular performance: **‘There are some great spaces, but they are all in churches or halls, and the acoustics just are not right for secular performance. Winchester is crying out for a flexible concert space with great acoustics’**
- Popular music in Winchester faces a gap between its only grass roots venue and the larger venues in town. **‘It’s really frustrating that the Railway is too small to book some of the bands we’d like to host, but venues like the Guildhall are too big. We’ll sometimes promote bands at a loss at the Railway on a sell-out show, just because we are fans. If there was larger venue then more concerts would be viable’**
- A promoter also highlighted that they felt the Guildhall was not used as much as it could be **‘The Guildhall should book more music shows. Events like Jo Whiley have proved there’s a market, but they seem to book a strange mix of events. If there was a great music venue in Winchester then I’m sure people would go out more’**
- Bar operators highlighted that there is a gap in Winchester for late night entertainment. **‘We think there’s a market for another DJ venue, Overdraft is great but it is small, and the other DJ spaces are very mainstream. Craft beer does well in Winchester, and there’s definitely a slightly older, music loving crowd who are not catered for’**
- Festival organisers highlighted the lack of a central hub for their activities, both as a means to market their events and as a way to create links between their festivals and the wider Winchester community. **‘In the past we’ve really struggled to find the right spaces for our outreach programmes. We want to connect with as many people as possible and we’ve seen demand outstrip places for our events. We’ve generally been limited to church halls, or spaces in the Discovery Centre. We’ve quickly hit capacity and could easily fill a 300 capacity room’**



2.7.5 STUDENTS & YOUNG PEOPLE

The COVID-19 crisis has meant that there are fewer students than normal in Winchester during the survey period, and with colleges and universities closed it has been difficult to reach the student population as a whole. However, the combined survey sample for Exhibiting Students, Other Students and Young Residents totals around 165 of our total response, which gives us a reasonable basis for understanding the views of young people in Winchester.

The results are not unexpected. While most of those we surveyed regularly went out in Winchester for a night out, or to go shopping, a majority felt that the shopping was poor, and the options for entertainment, nightlife and just to 'hang out' are limited. Our respondents overwhelmingly wanted to see a better mix of shops, especially independent shops, and more entertainment options, for example crazy golf or bowling.

The Kings Walk Quarter should be designed to both create career opportunities and incubate fledgling businesses – while 80% of exhibiting students intend to leave Winchester after they graduate, 100% of those students said they would remain in Winchester if the right job was available. Employability of its graduates is naturally of importance to local Universities and who indicate they would be supportive of any plans to create a creative hub.

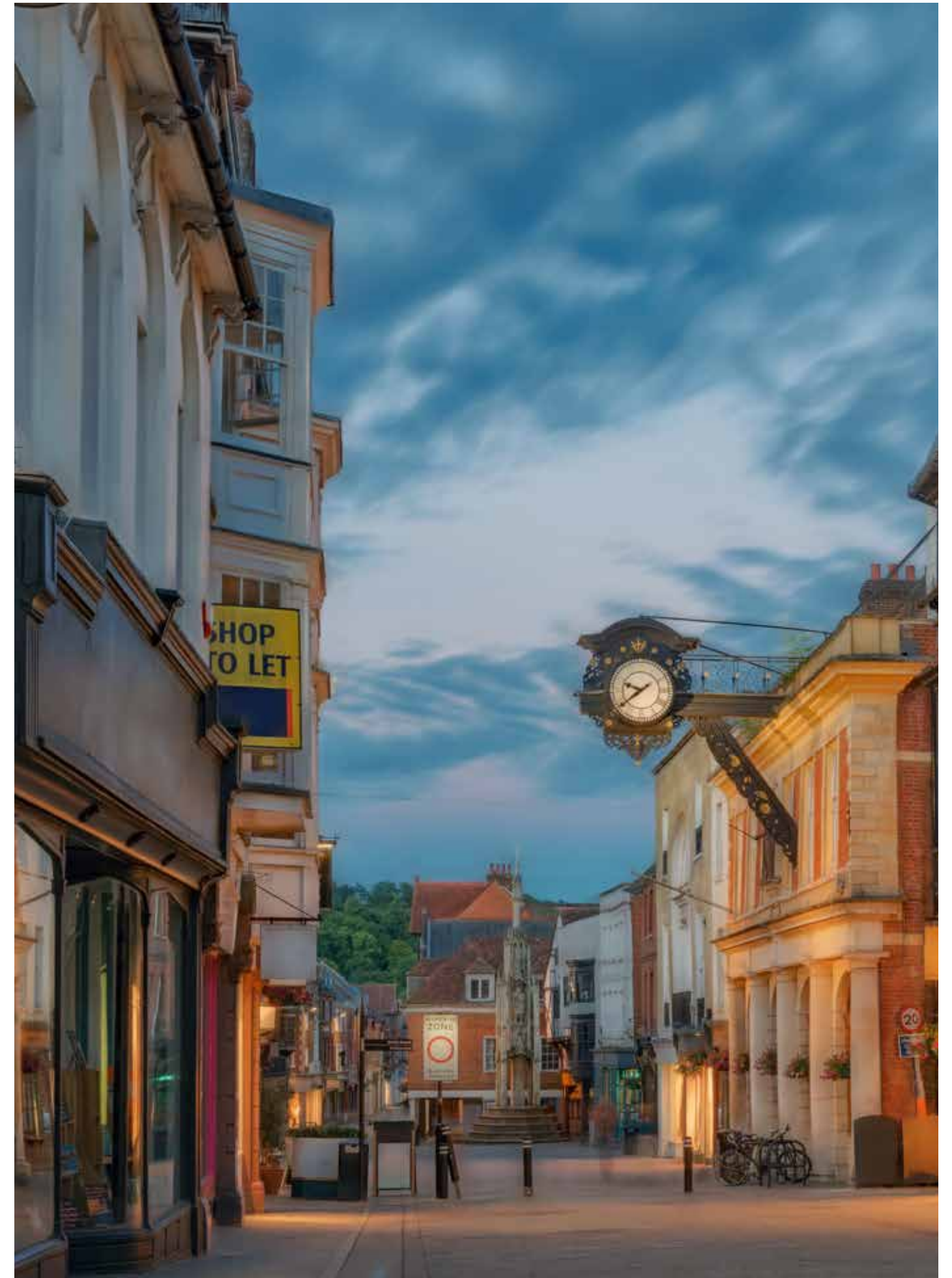
While our sample is small, this is an accurate snapshot of Winchester's broader strategic problem: its creative community is hidden and lacks focus, there are relatively few attractive career options for young people, accommodation is expensive, and the shopping, entertainment and nightlife lacks options, quality and variety. Small wonder the bright lights of London (and other cities) attract the young talent of Winchester away.

Survey Insights

- While a significant number of students and young people go for a night out in Winchester at least once a week, all cited a lack of bars, venues and entertainment as reasons why they didn't go out in Winchester more often
- They would like to see more live music, better street food options (and a food hall) and an alternative to the current cinema, with Everyman viewed as expensive
- They visit Winchester frequently at the weekend, but cite having nowhere to hang out, a poor range of shops and entertainment as the main reasons they don't visit more often
- They would overwhelmingly like to see more independent brands and fashion shops
- Many cited the expense of Winchester's current nightlife and retail offerings as off-putting
- 80% of the exhibiting students who responded to the survey said they are not planning on remaining in Winchester after their course finishes – but 100% of them said they would if the right job was available

Stakeholder Insights:

- Both universities are very keen to increase work placement opportunities for students in town. The creation of a creative hub will provide great opportunities and more visibility to the services that the universities can offer local employers. Universities are keen to promote this
- Students said that they don't know who is who in the creative scene in Winchester, but the creative scene is easier to find in Southampton
- Students would like affordable places to do pop-up exhibitions and run pop-up shops etc like other cities offer
- One student said **'You just don't get the sense that Winchester has a creative scene as there is no visibility of it in street art. There is very little creativity on the streets of Winchester. Winchester School of Art may as well be invisible'**
- Another said **'We would love to get more local residents and businesses along to our end of year degree shows but there is nowhere to advertise in the town centre. Kings Walk could really bridge the gap'**



2.7.6 RESIDENTS

Unsurprisingly, our largest sample came from residents who did not identify in one of our specific categories (workspace, studio space, retailers etc), with nearly 60% of responses. While we did not ask respondents to give their age, it is clear from the comments that this group skewed slightly older than the rest of the survey, and their views reflect this.

It was interesting to see the older generation coming out in support of the younger generation by citing there ‘Is not much for young people to do’ and their desire for Winchester to offer more, particularly for teenagers.

However, we see a recurring theme through all responses to the survey. Winchester’s shopping is overwhelmingly viewed as unsatisfactory, with 49% citing a poor range of shops as the reason they don’t visit Winchester more frequently at the weekend, and 83% saying they wanted to see more independent shops in Winchester. Better food options are also a popular wish for this group, along with improved leisure facilities – better cycling facilities were a recurring theme in our comments.

This group want to see better live music options, with 59% saying this was a priority.

Perhaps unsurprisingly this group wants to see more family-friendly attractions, with a lack of family cafes and restaurants being cited frequently in the comments (they also cite childcare issues being the main reason they don’t go out very frequently in the evenings, with over half going out in the evening in Winchester once a month or less). There was a very strong view that young children are not well catered for in Winchester town centre, lack of soft play, splash parks etc.

While the survey data from all groups can suggest a fairly bleak view of Winchester from those who know it best, it must be said that the comments suggest that the residents of Winchester are hungry – and impatient – for change. There’s a real hunger for variety, for new businesses and independent businesses, and an acknowledgement that Winchester should focus on youth and the future.



Above all, there are repeated comments about a lack of progress and vision, and it is clear to us that based on the responses to the survey the Kings Walk development will meet a number of needs. It won’t be a magic wand, and in particular is unlikely to solve all Winchester’s retail problems and needs, but rapid progress on the project would provide a very visible example of change and movement.

Survey Insights

- 60% of those surveyed go out in Winchester once a month or less
- Over 50% of those cited lack of good bars and music venues as a main reason they don’t go out more in Winchester
- Lack of cycling provision was cited regularly in the comments as a reason not to visit town more frequently
- 75% of those surveyed visit Winchester at the weekend once a fortnight or more
- 48% of those who visited Winchester cited poor range of shops as the primary reason they don’t visit more frequently
- Nearly 60% would like to see more Live Music, while street food and a food hall were popular, pulling 82% of respondents in total
- Over 83% want to see more independent shops

What are Creative Enterprize Zones?

As mentioned previously, Kings Walk Creative Quarter has the potential to become a Creative Enterprise Zone. But what exactly is a Creative Enterprise Zone? In a nutshell, they exist to create and secure jobs and attract business. Whether it's a career in digital, architecture, music, design or the arts – a CEZ is a great place to find support and facilities which might otherwise be hard to come by.

Enterprise Zones are part of the government's Industrial Strategy aiming to support business growth across the country. Whilst many Enterprise Zones are generic, many are now focused on supporting specific sectors – including creative industries.

A Creative Enterprise Zone (CEZ) is a small geographical area with emerging or existing clusters of creative industries and are often sited in areas where regeneration has been earmarked.

CEZ are designated areas where artists and creative businesses find permanent affordable space to work; are supported to start-up and grow; and where local people are helped to learn creative sector skills and find new jobs.

They are spaces where artists and creatives can meet clients, network, share knowledge and showcase their work, and support enterprise and growth through developing skills. They often work in partnership with local organisations and institutions who open up their facilities for the local community.

They aim to be a standard bearer for creative careers and routes into the creative industries, working with education providers and job agencies giving local people job opportunities, work experience and advice.

Creative Enterprise Zones (CEZ) are usually derived from objectives set out in the Local Plan of an area, normally as part of the economic development strategy. A CEZ raises ambition and embeds creative clusters in policy and local leadership.

Enterprise Zones are part of the government's Industrial Strategy aiming to support business growth across the country. Whilst many Enterprise Zones are generic, many are now focused on supporting specific sectors – including creative industries.

Winchester has two recognised creative clusters (as defined by NESTA), these are Digital and Architecture. A creative cluster is a concentration of creative businesses in a local area twice as high than the national average. Creative education does not feature in NESTA data, so it is fair to assume that visual and performing arts also have a strong but underrated presence in the city, as both Winchester School of Art and Winchester University have a strong background in both these sectors.

Why support Creative Enterprise Zones?

The creative workforce is growing four times faster than the economy and 87% of creative jobs are unlikely to be automated. These are the jobs of the future.

Creative clusters provide creative businesses and artists with opportunities to network, become successful, and benefit from sharing knowledge and expertise. They help drive good growth, health and well-being and put culture at the heart of local regeneration.

As well as producing incredible film, music, design and fashion, the creative community play a wider role. They are often the advance party, setting up workspace in disused and cheap spaces – breathing life into unloved neighbourhoods and increase land values along the way. But this model is no longer sustainable: cheap space has run out in many urban places and creative communities are pushed out. Winchester is no exception.

How do Creative Enterprise Zones work?

A CEZ has a focus on four different areas:

- Space
- Skills & Support
- Policy
- Community

Space

A CEZ secures permanent, affordable, creative workspace (and ideally – but not always practical – live/work spaces) at well below market rents.

Skills & Support

A CEZ is a place to build entrepreneurial skills and offer business support to artists, start-ups, sole traders, micro-sized and small businesses. They also act as a 'magnet' for people interested in pursuing career pathways in the creative industries and offer opportunities for jobs (both paid, voluntary and work experience) for local people from all backgrounds.

Policy

A CEZ is usually developed alongside the Local Plan which has a pro-culture/creative industry strategy and in partnership with the local creative community. It can act as a 'beacon' of creative activity for the area.

Community

A CEZ aims to embed creative production in communities, creating socially-inclusive places and strengthening links with marginalised communities and education providers.

If the CEZ is in a designated Enterprise Zone (as outlined in the local industrial strategy), it will also qualify for up to 100% business rate discount worth up to £275,000 per business over a five year period.

Who runs Creative Enterprise Zones?

Successful CEZ's have good structures and governance. Local authorities usually champion their Creative Enterprise Zones at the highest level. That means cabinet members in charge of Regeneration, Economy, Social Inclusion, and Culture give it full support.

They are often run by a board of local interested parties including the local authority. The board may have representatives from local creative businesses, artists, local creative organisations, developers, workspace providers, further and higher education and other stakeholders.

Creative Enterprise Zones are facilitated by trusted individuals – referred to as CEZ Leaders or CEZ Managers – who are well connected in the creative sector who broker, maintain and curate relationships among their community, region and nationally. They normally have a track record of the sector and understand the needs of the creative sector from both a commercial (running a creative business) and cultural perspective.

Lewisham has a long reputation of championing the creative sector locally through 'Creative Lewisham' which was first founded in 2000. It was no surprise that Lewisham in London was one of London's first ever Creative Enterprise Zones to be selected by the Mayor of London. SHAPESLewisham is a creative network and aims to promote, celebrate and connect the creative community in Lewisham. Partners include Trinity Laban Conservatoire of Music and Dance, Goldsmiths University, Second Floor Studio and Arts, The Albany Theatre, Lean, Studio Raw and Lewisham Borough Council.

Where are Creative Enterprise Zones?

There are different examples Creative Enterprise Zones. CEZ's are made up of many shapes and sizes, from buildings that house creative practitioners and businesses to temporary labs and incubation spaces which ignite innovations to online networks that bring people together through an annual programme of events. Every CEZ is as unique as a fingerprint as its model is determined by its geographic placement, cultural context, community requirements and funding model. But its purpose is the same – to unite, develop and showcase the creative sector within the community and to connect it to a wider audience regionally and nationally.

Middlesborough's booming digital and creative business sector has benefited from a new enterprise zone in the heart of the Historic Quarter. Eligible companies looking to locate to the Enterprise Zone can qualify for up to £55,000 a year of rate relief over five years but only if they belong to the digital technology or creative sector. To qualify they must also demonstrate how their business intends to grow and link into to business support services.

How are Creative Enterprise Zones funded?

As each CEZ is different, so is the funding model – some are dependent on capital grants, others seek support for training and development. However, as a rule the seed funding is provided by local authorities of between £200,000–£400,000. Other sources of funding include European Structural and Investment Funds, private sector funding and the in the case of London CEZ's, Mayor's Good Growth Fund. If the CEZ is within an existing Enterprise Zone (as outlined in the local industrial strategy) businesses would be eligible for rate reliefs and other concessions or grants from the LEP.



3.0 Space Analysis

Spaces we have assessed

The King's Walk block consists of an arrangement of buildings from different times and of visually contrasting styles.

This study analyses two of these buildings: The King's Walk building and the remaining half of a multi storey car park sitting above an Iceland retail outlet. The King's Walk building has approx. 4010 square metres and the car park approximately 1380 square metres, roughly 5400 square metres in total.

The King's walk building itself has existing uses on its lower floors while its upper floors are currently vacant. As a result, the building has been assessed in these two parts.

The multi-storey car park has been assessed assuming that the ground floor uses and the adjacent lower half will not be part of the study.

In addition, the building setting – its facade, visibility and adjacent streets – has been taken into consideration as a way to meaningfully enhance and embed the future uses.

The Nutshell is a community theatre and rehearsal space directly north of the King's Walk building and is as such not part of this study. We are working to ensure changes to the King's Walk building should preserve or enhance the Nutshells' setting.





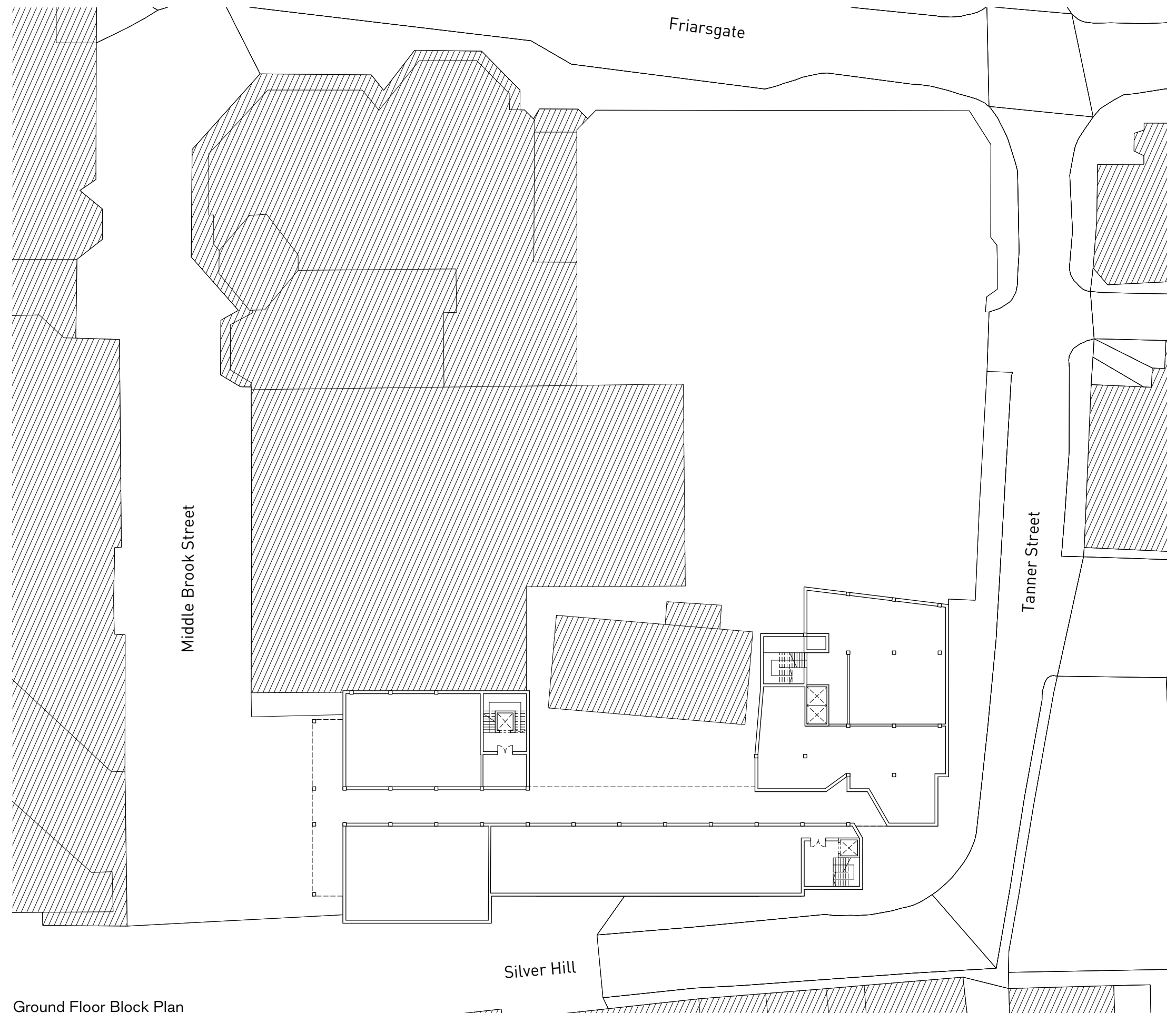
3.1 Building Setting

The current building setting is quite poor but has huge potential; a number of simple and low cost improvements would make a big difference here.

Existing street setting

- Silver Hill, Tanner Street and Friarsgate have narrow pavements and are hard to navigate as a pedestrian
- Additional and improved seating should be provided in light of Covid 19, as people are encouraged to spend more time outdoors
- Long views onto the buildings don't immediately communicate where the entrances are and where they lead to, especially the kink in the King's Walk passage is confusing and visually unclear
- The street crossings and pedestrian flow are hard to navigate and not very inviting for leisure strolls
- All building entrances look very similar and are hard to find with small doors and minimal signage
- The glass lantern entrance staircase to the multi-storey car park has a great setting from Middle Brook Road with very good visibility of the stair tower and the entrance door, if the door itself could be enhanced

In summary, the current setting requires improvements, but these are clear, simple, and relatively easy and affordable to achieve.



Ground Floor Block Plan



Shops or other destinations on the corner of Silver Hill and Tanner Street require extra signage to be visible while the stair tower to the car park is easy to find.



The rear entrance to King's Walk is too small and the kink prevents visitors to visually navigate by seeing where they are going.



The facades and entrances of the King's Walk building appear uninviting.



The delivery zone has large potential and visibility that is currently unused.



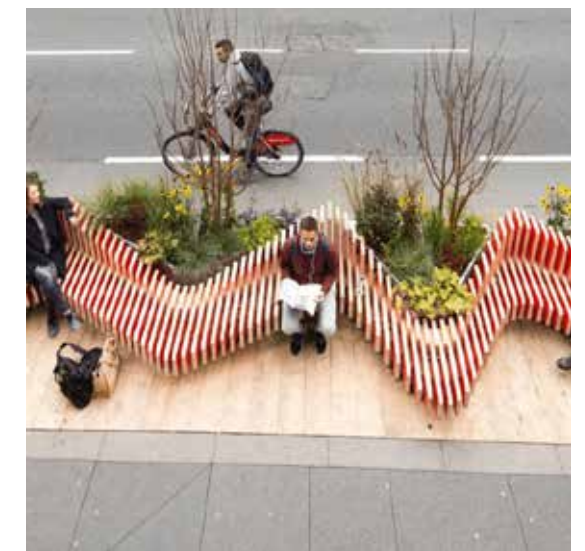
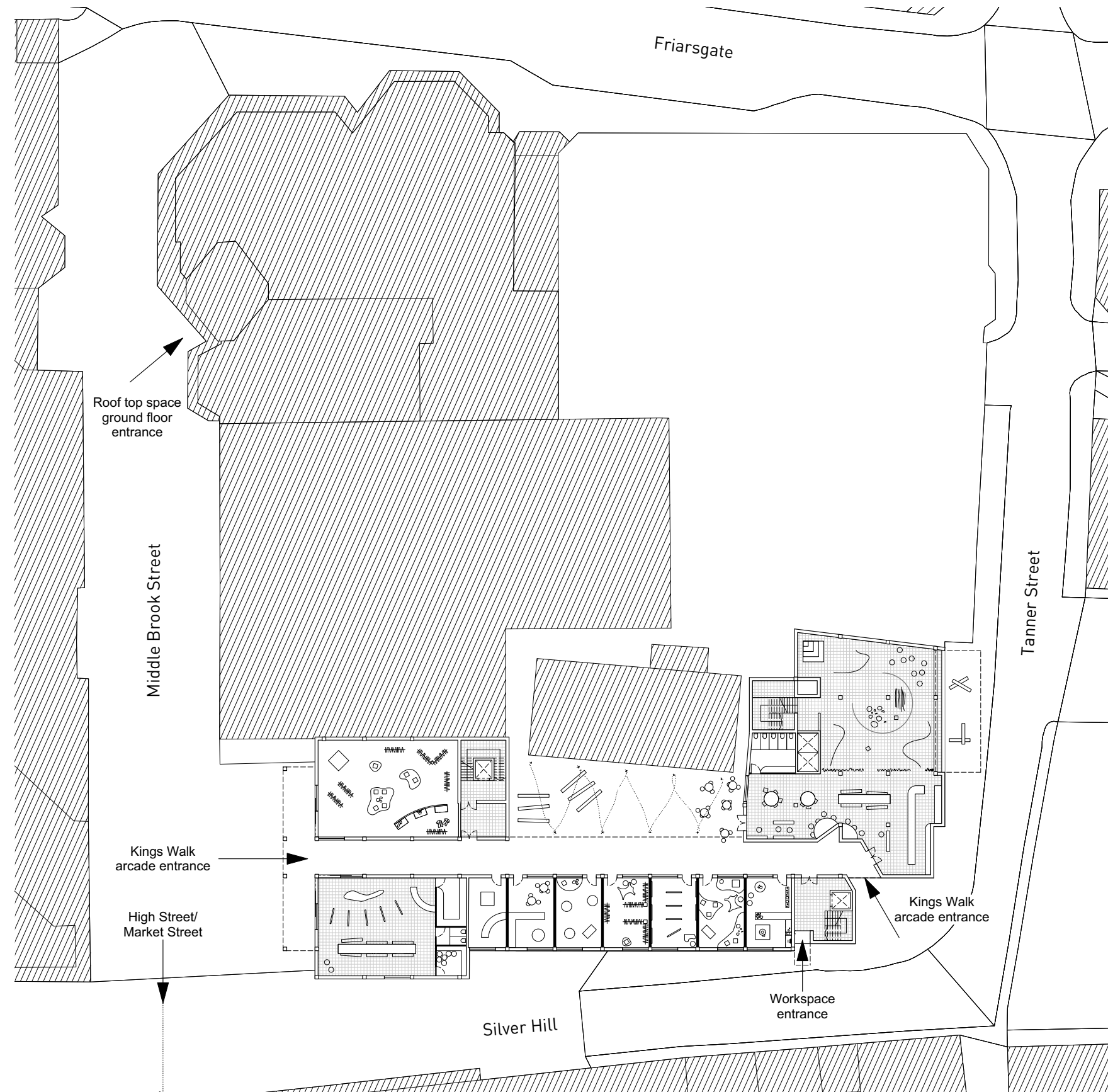
Art Crossings invite pedestrian visitors



Clearly visible entrances are easy to find



Festoon lighting helps with atmosphere



Parklets provide seating and greening



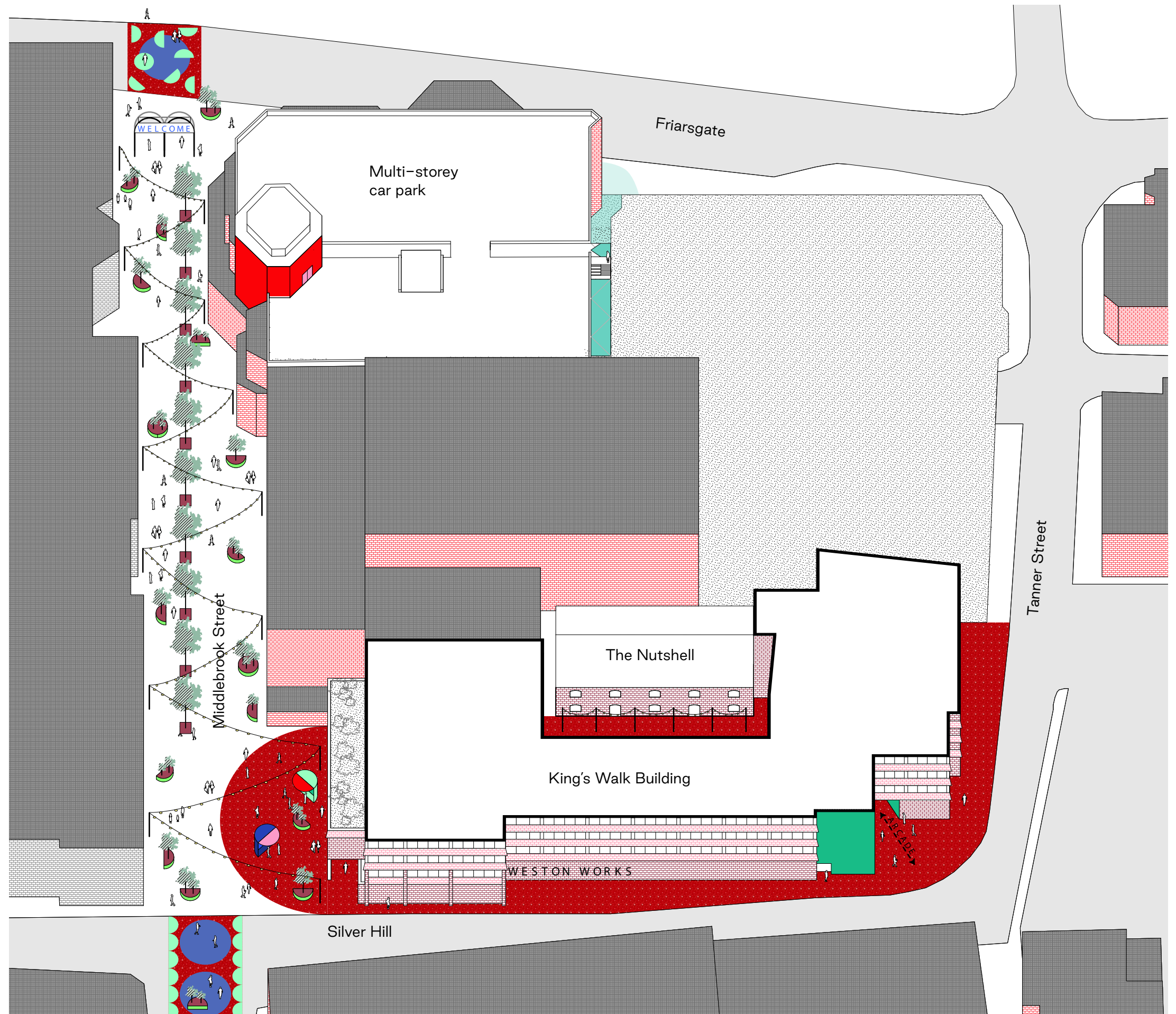
Graphics on street surfaces bring joy

Street setting potential

- Silver Hill, Tanner Street and Friarsgate pavements could be painted to make them more visible and inviting with special highlights around relevant building entrances
- Sheltered outdoor space, outdoor seating could be added or improved along Middlebrook Street and in the Nutshell courtyard to provide a maximum of outdoor (physically) distanced seating
- The visibility of the buildings main entrances could be enhanced with large scale painted elements around entrances and stair cores to fully capitalise on the existing long views
- To enhance the visual navigation through King's Walk, removing or re-locating the unit at the Tanner Street end and widening this entrance could be considered
- Art crossings could be more playful, and more inviting for pedestrians to stroll and discover
- In order to allow for different uses in the buildings, the different entrances should be given a different and specific visual identity that people remember and can find
- The ground floor entrance to the multi-storey car park could be enhanced with large graphics and lighting to help visibility. The beautiful lantern stair tower could be illuminated to fully capitalise on its visibility. A second, colourful stair tower could be erected on the other side to further increase visibility

These relatively low cost improvements have great potential to swiftly enhance the setting of the King's Walk and the Multi-Storey car Park building in the short term.

These enhancements could be recreated in a more permanent and high spec finish at a later stage if they have proven successful.

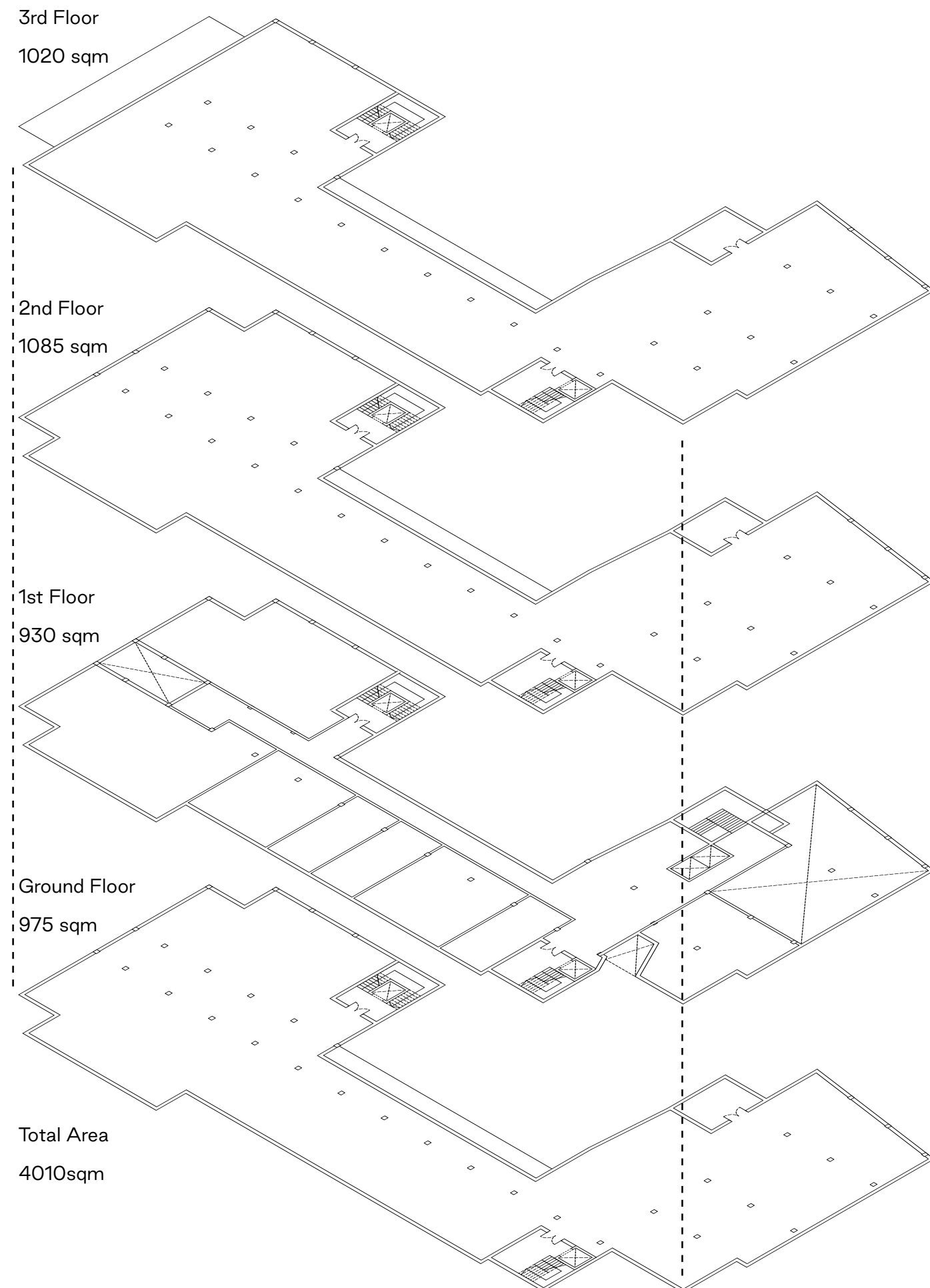


3.2 King's Walk

Existing Building observations

- The building is split into two different uses. The lower floors containing currently used retail, and the upper floors which previously contained offices but are now vacant. This split seems logical and has good potential for meaningful phasing of future proposals
- The King's Walk sheltered outdoor arcade is a great asset since the coronavirus pandemic but would benefit from a widened rear entrance with increased visibility
- The courtyard towards the Nutshell Theatre is currently underused but has huge potential to be activated and frame the existing Theatre building better
- The service area on ground floor with its generous ceiling height and large opening towards the street has great public facing potential that is currently not used
- The ground floor retail units don't use their first floor level floorspace well or at all. These spaces could be put to a more active and viable use
- The upper floors have been stripped of all incoming services. These would have to be re-instated to allow for any longer term uses. This will require upfront investment for the initial basic fit-out to be undertaken
- All upper floors have good sized floor plates with generous windows and good light

The building is capable of holding a variety of uses and unit sizes. This makes it very suitable for an agile approach to building uses and viable phasing of future proposals.





The arcade would benefit from a simple makeover with contemporary signage, colour & graphics.



The service corridor of first floor makes it possible to use this floor independently.



The yard has great potential as a destination and to enhance the Nushell's setting



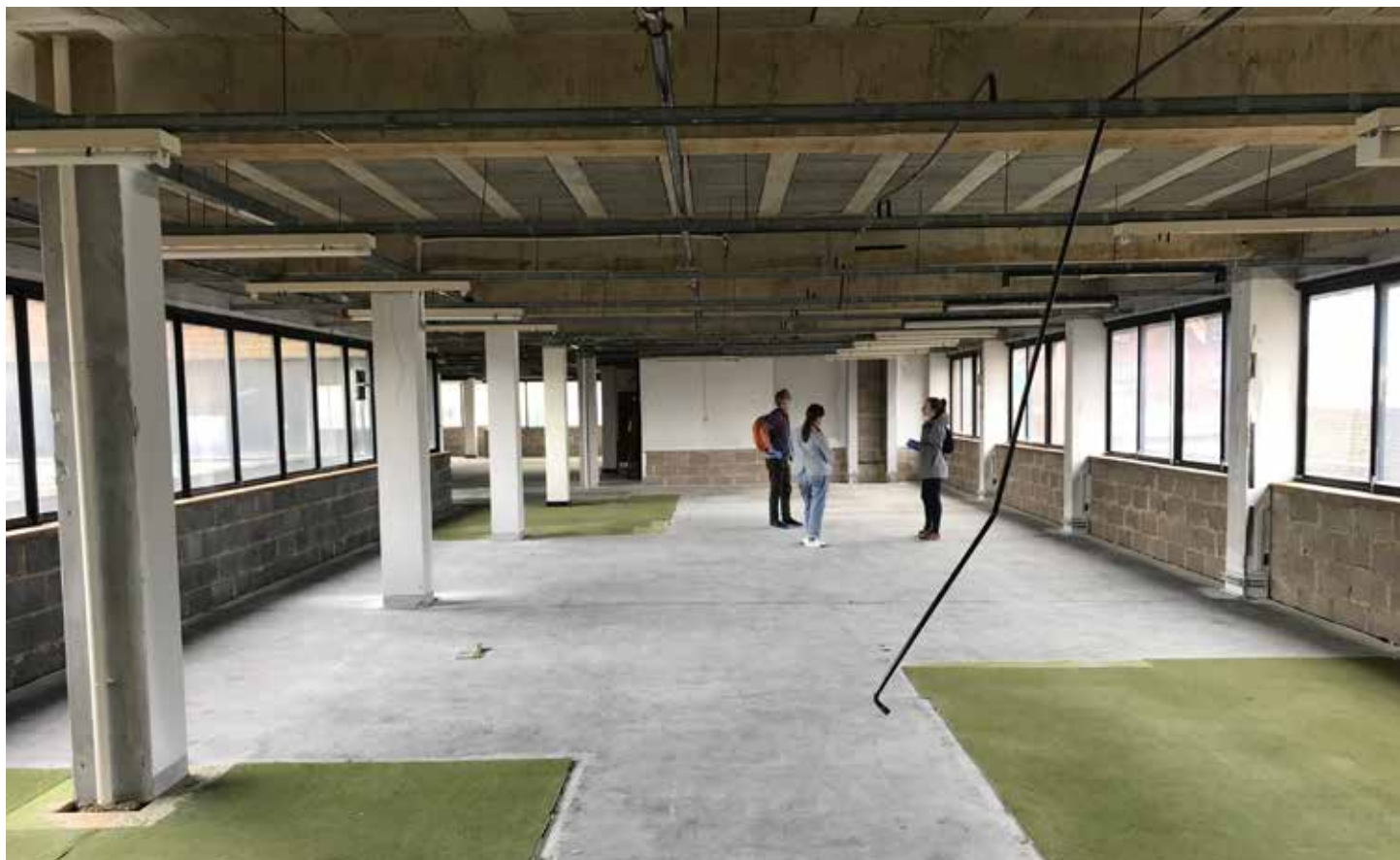
The service area's large space volume has great potential as a street facing gathering space



The third and highest floor has great light and generous spaces.



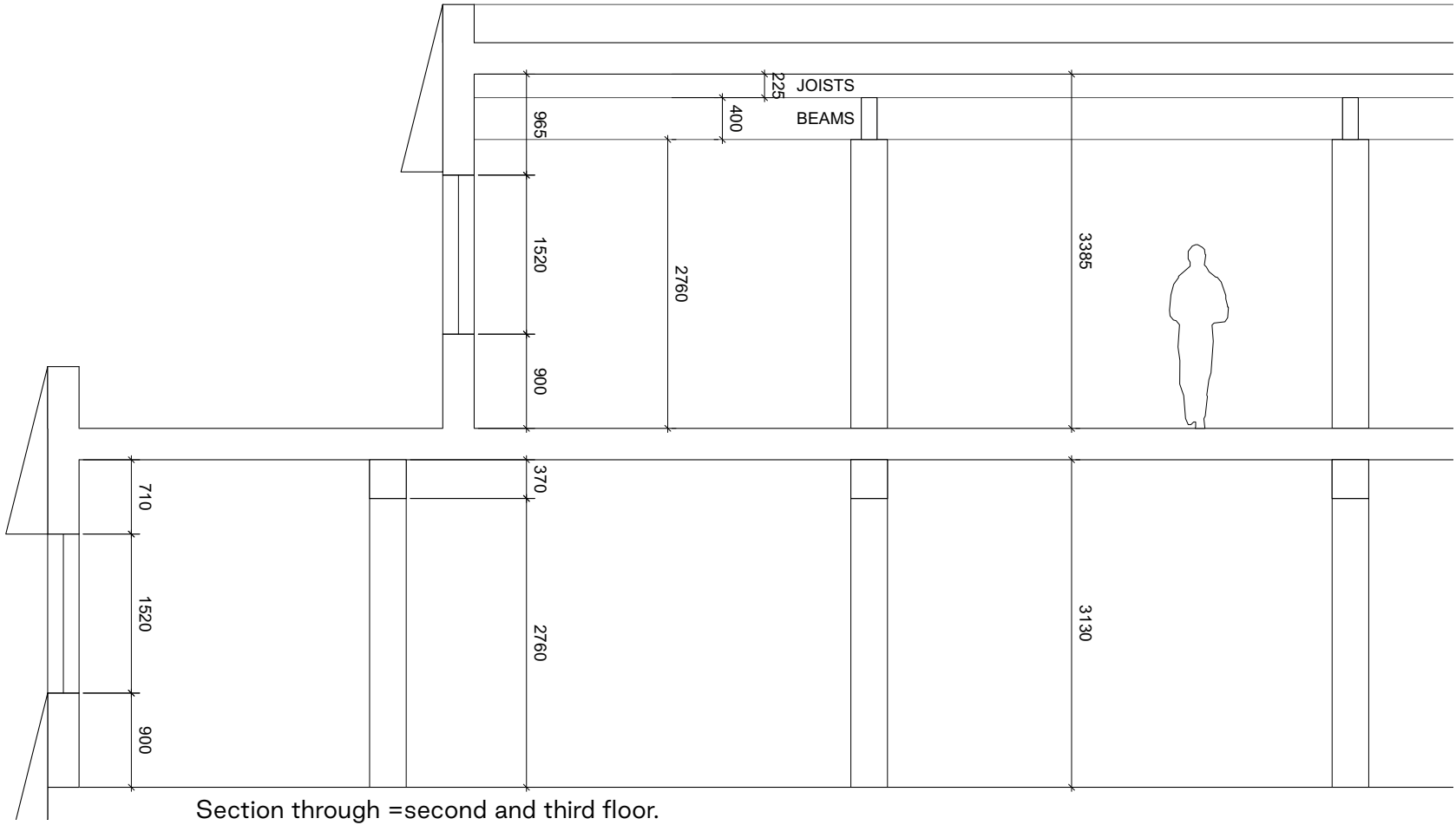
The exposed ceilings show beautiful steel and timber work that could be restored beautifully.



The Second floor space also has great light and generous spaces.



The exposed concrete and steel ceiling has a beautiful industrial look that is ideal to set a tone.



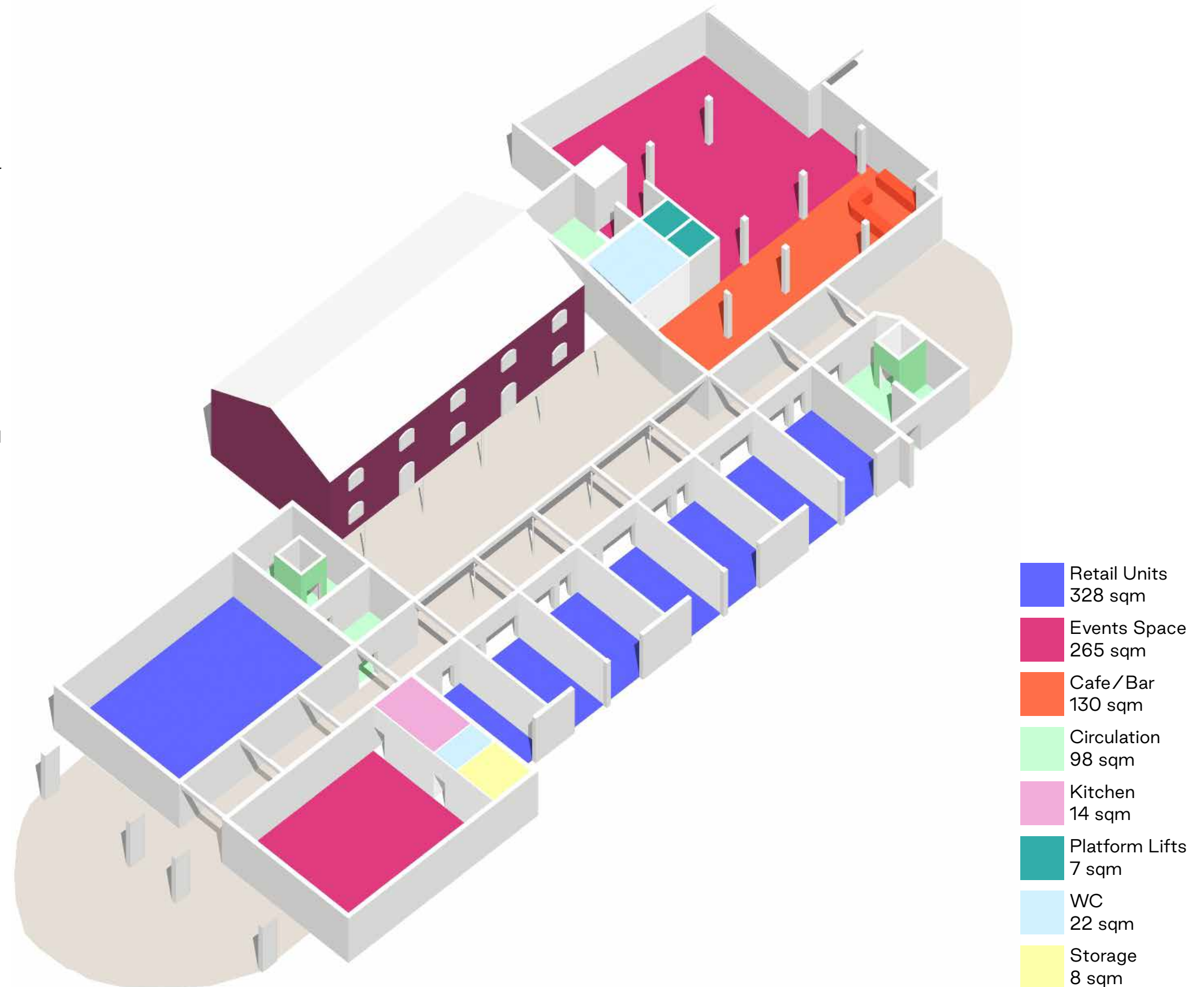
Stripped out services, partitions and finished require works to make the building usable

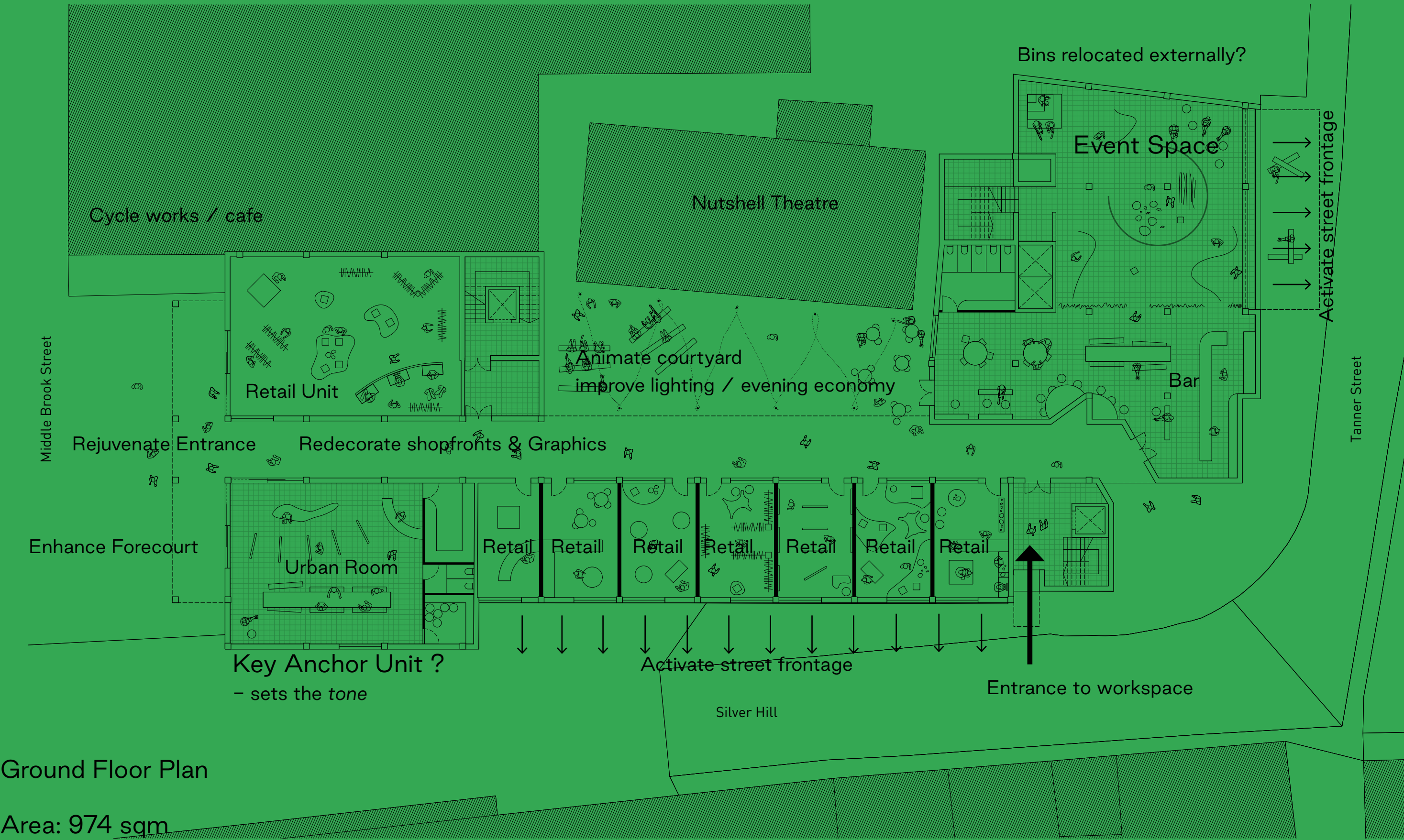


The stairwells have a very good quality finish and are in good repair.

Building Potential – Ground Floor

- The King's Walk sheltered outdoor arcade is a great asset since the coronavirus pandemic and has a widened rear entrance with increased visibility. This entrance is flanked with a lively use that provides overlooking, footfall, and visible activity
- The courtyard towards the Nutshell Arts Centre could be improved and activated with outdoor seating and planting, framing the existing Arts Centre building better. It serves as spill-out space for all surrounding units to provide a maximum of events and activity here
- The service area on ground floor with its generous ceiling height and large opening towards the street has great public facing potential and could become a stage or venue activating this corner of the public realm
- The ground floor retail units could be made smaller single storey units for shops or food and drink outlets. The facade towards the street should have enlarged openings advertising the units to the street, increasing daylight and activity
- The rear staircase with goods lifts is now accessed via the adjacent car park where the bins are re-located to. This frees up the large service area for activity and makes this part of the facade look more inviting and active

Ground Floor**Area: 970 sqm**



Ground Floor Plan

Area: 974 sqm



Improved open facades and visibility.

A variety of local shops and food and drinks businesses with renovated shop fronts.



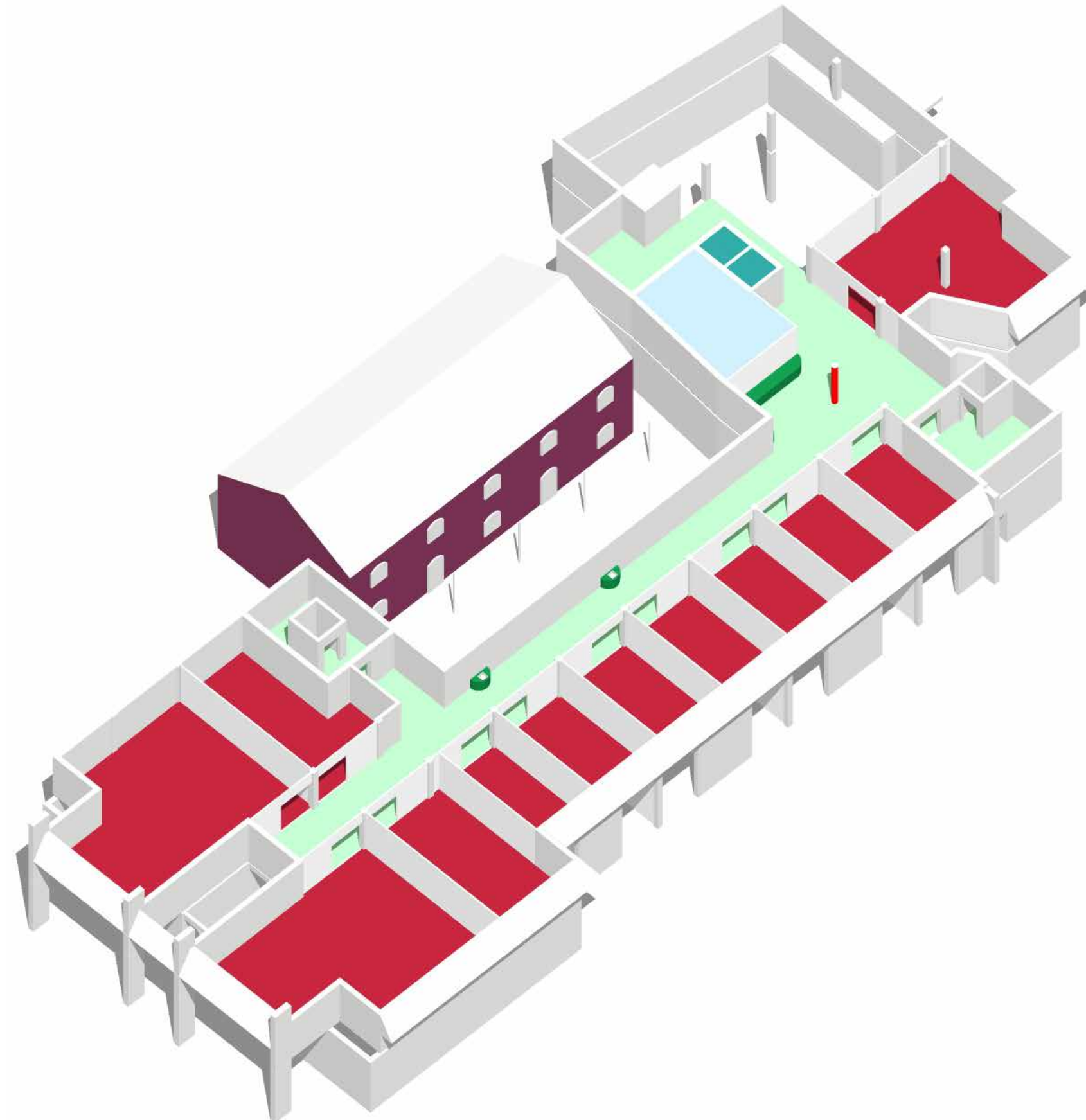
The yard towards the Nutshell Theatre has great potential as location for all.

The service area has great potential as versatile event space that can also open to the street.

Building Potential – First Floor

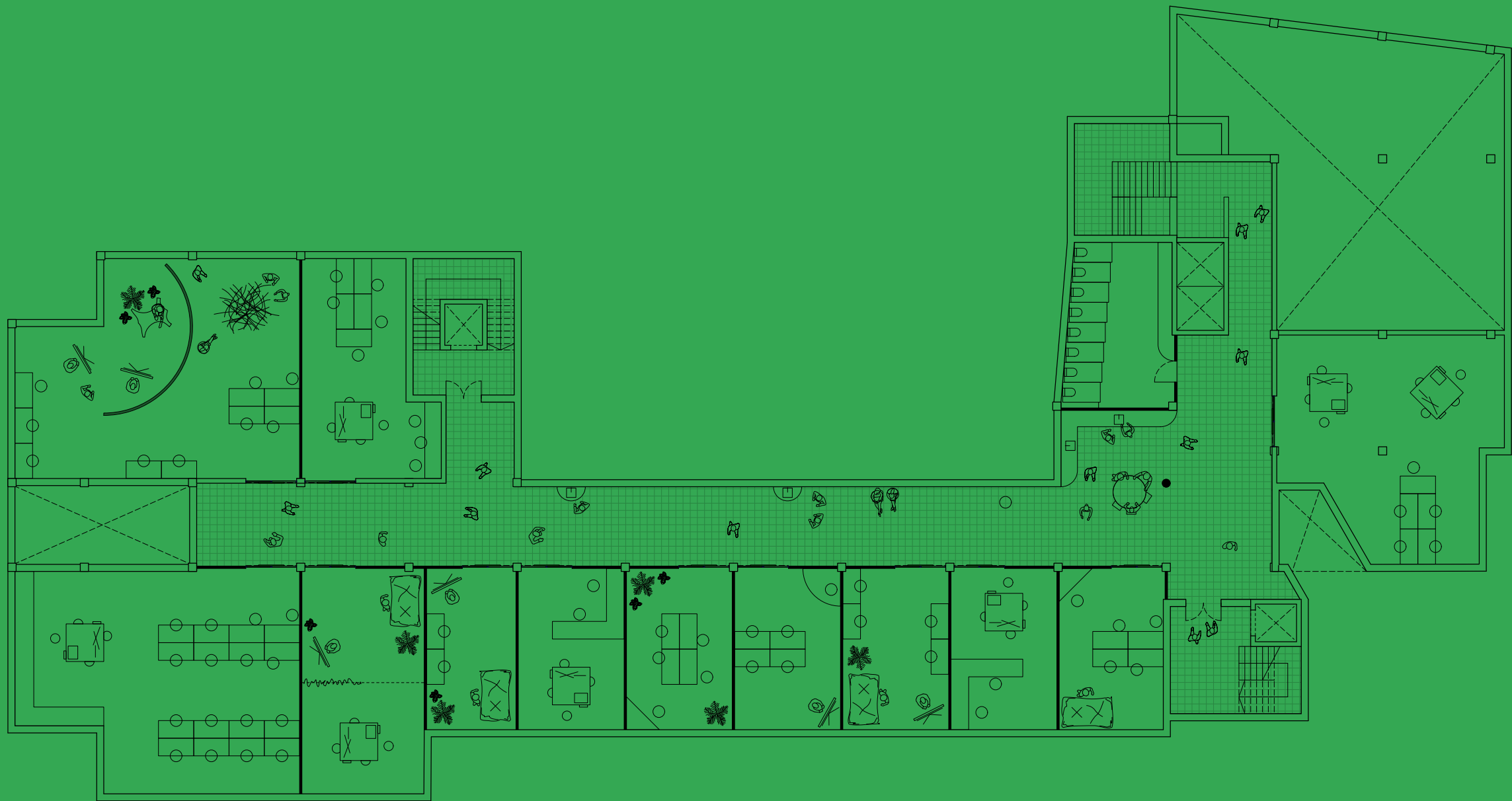
- The first floor now operates independently from the ground floor retail units and could be turned into more making or crafts based studios and maker units, benefiting from the goods lift. The work produced by these units could be sold or showcased on the ground floor more flexibly, allowing for a maximum of people to use the building
- The unit adjacent to the service area could be used in combination with the proposed venue and function as back of house changing room or as additional cafe seating space

The generous circulation and multiple staircases make this floor very easy to convert, with large potential to be converted into workspace either in one go or incrementally as the ground floor unit leases become available.

**First Floor**

Area: 930 sqm

	Studio/Maker Space
592	
	Platform Lifts
7 sqm	
	WC
32 sqm	
	Circulation
300 sqm	



Convert upper levels of retail to self-contained studios. Suitable for makers with goods lift access.

First Floor Plan

Area: 930 sqm



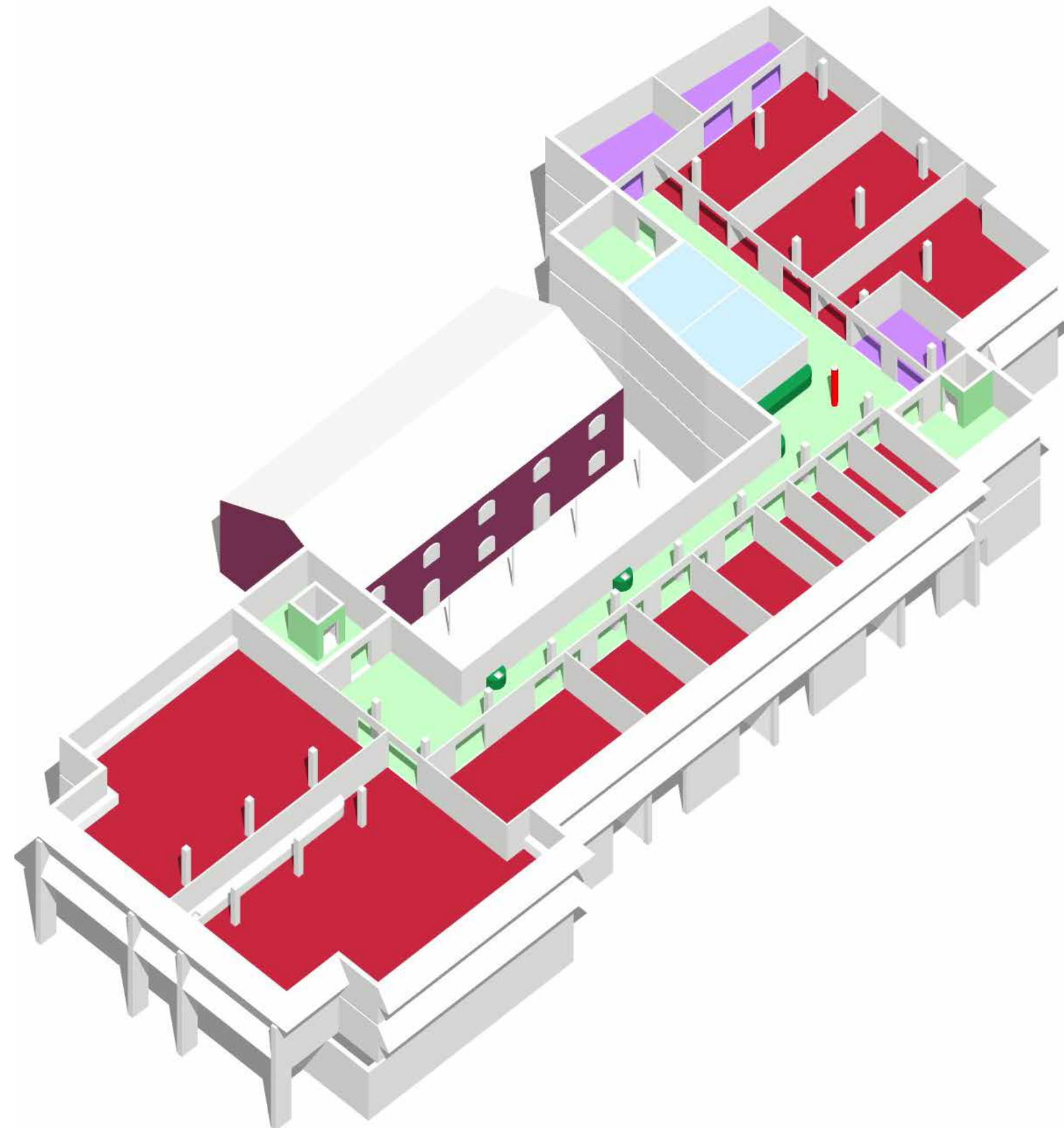
The first floor spaces could be used as more crafts or arts focussed workspaces to make best use of the good lifts and close by ground floor shops.



Making and creative industries are a wide field that could go from more educational uses via fine art to art production such as printing or food production.

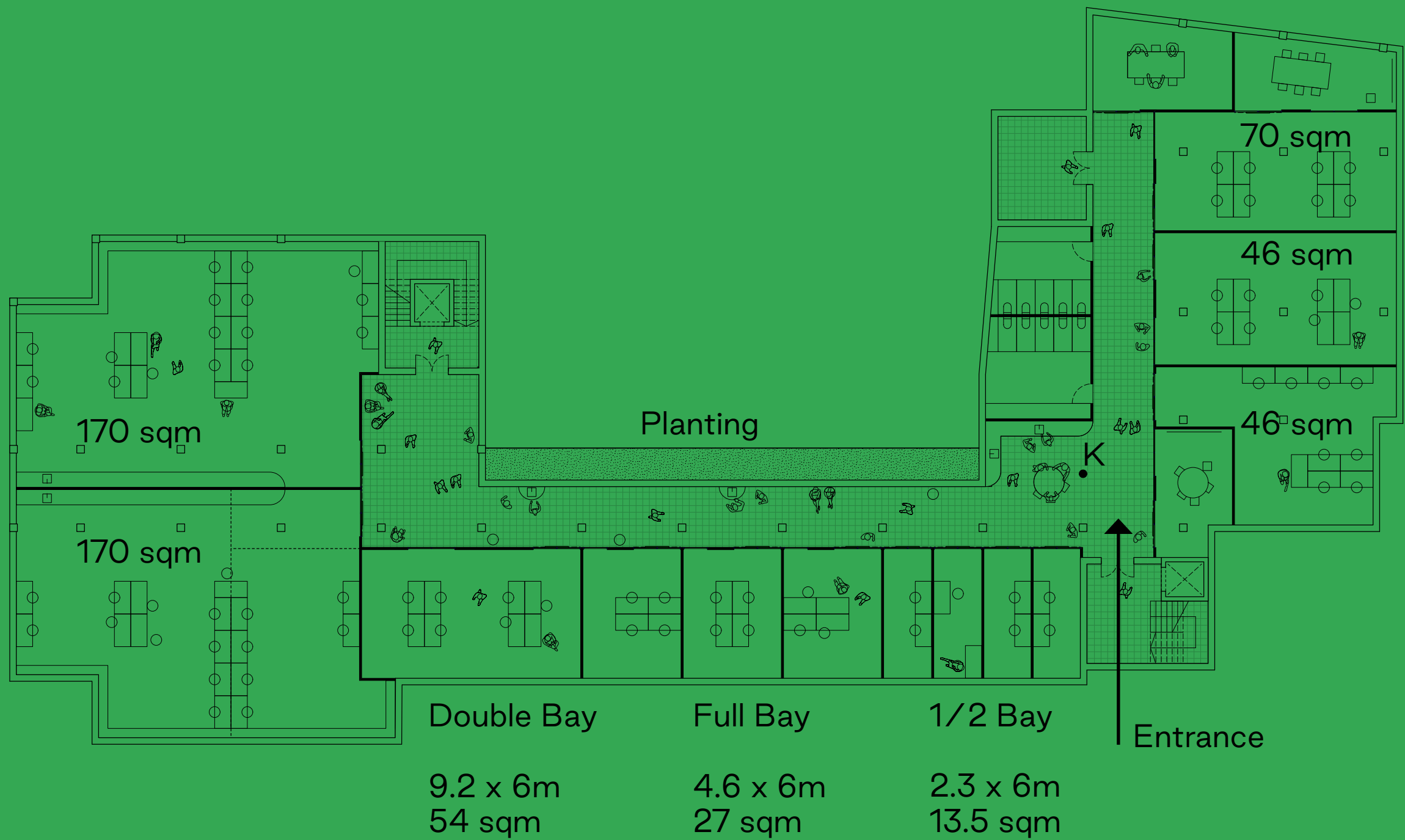
Building Potential – Second Floor

- The second and third floor spaces would work best as an ecosystem of spaces. Therefore, the second and third floor have been assessed together
- In order to allow for any uses to take place here, new services and floor finishes are necessary, as well as basic painting and decorating. The beautiful industrial ceiling could be left exposed if they are cleaned and painted neatly
- A shared circulation connects the three staircases and shared toilet block. As the circulation is generous and well lit, it has great potential to become a destination in itself, with communal meals, exhibitions and events taking place there
- Shared meeting rooms, toilets, and kitchen are the key infrastructure that allows the units to function with minimal electrical wiring and good wifi, minimising water services distribution and therefore cost
- The ends of the building allow for medium and larger sized units while the long thin middle lends itself to smaller units which have been very successful at Pop Brixton and Peckham Levels

**Second Floor**

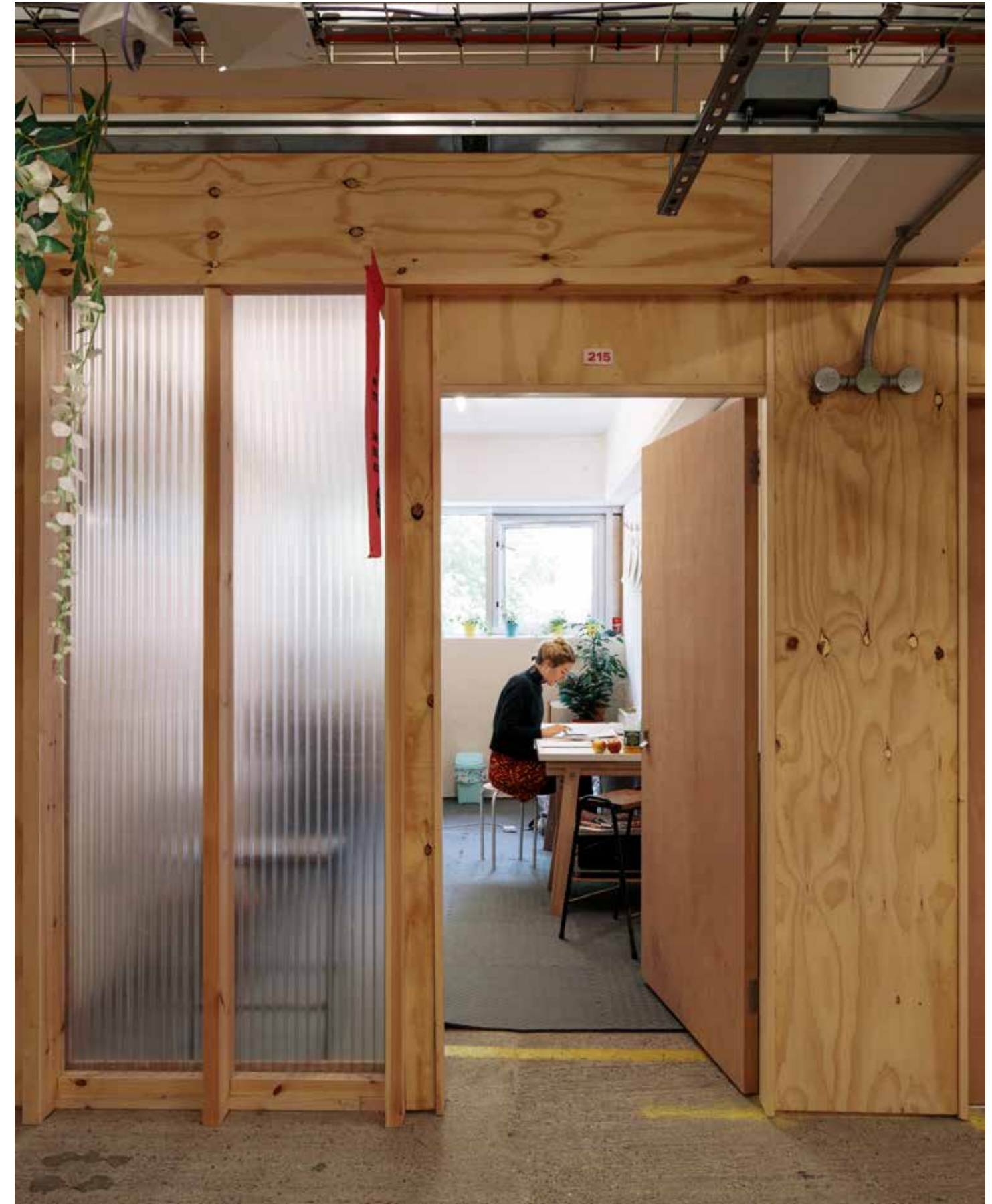
Area: 1115 sqm

	Workspace
	715 sqm
	Meeting Rooms
	67 sqm
	WC
	40 sqm
	Circulation
	262 sqm



Second Floor Plan

Area: 1115 sqm
Capacity circa 100 people



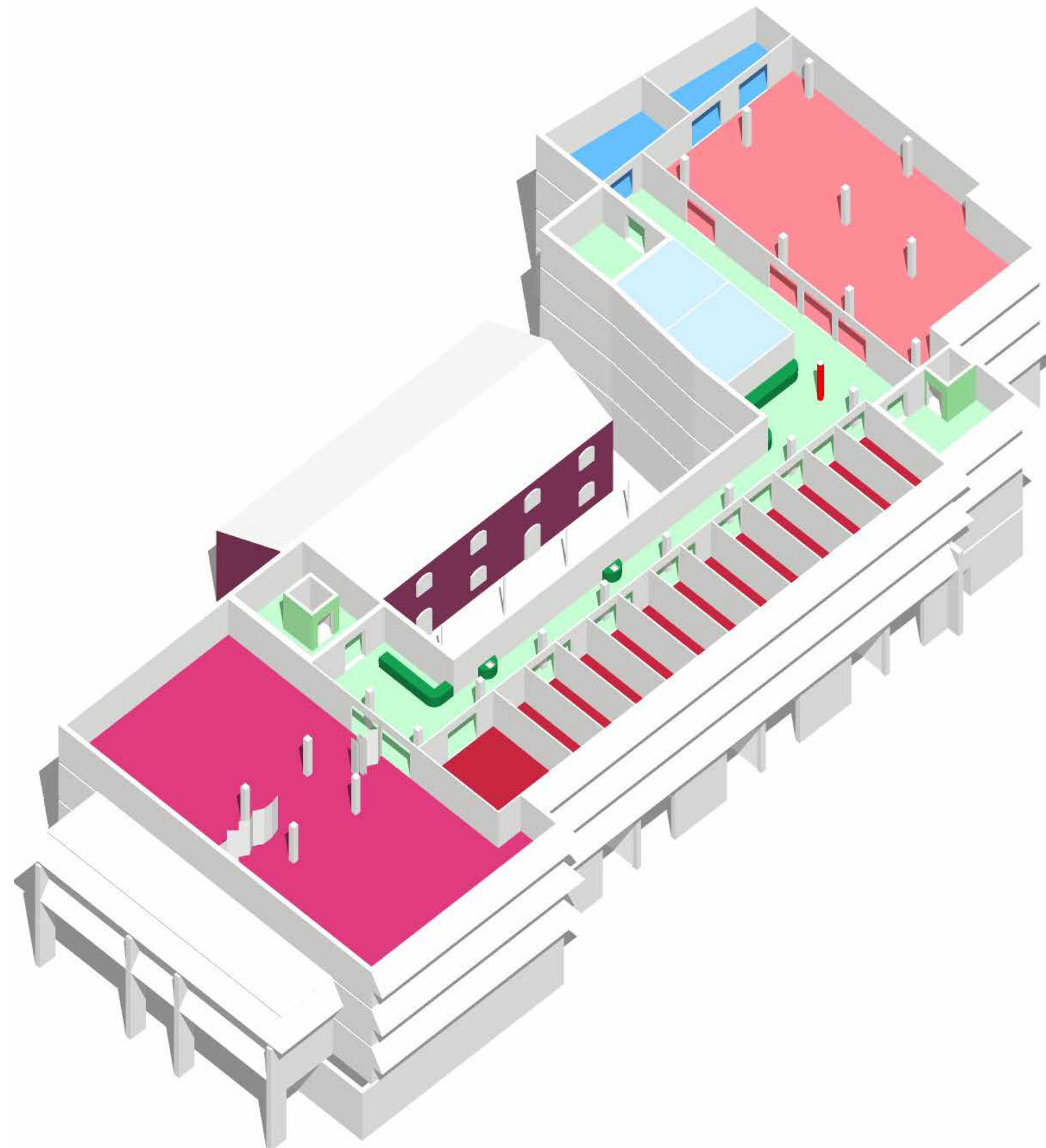
At Peckham Levels, the small studios around 14 sqm were the most successful and sought after.



Generous circulation can be used as exhibition and spill out workspace for all kinds of businesses.

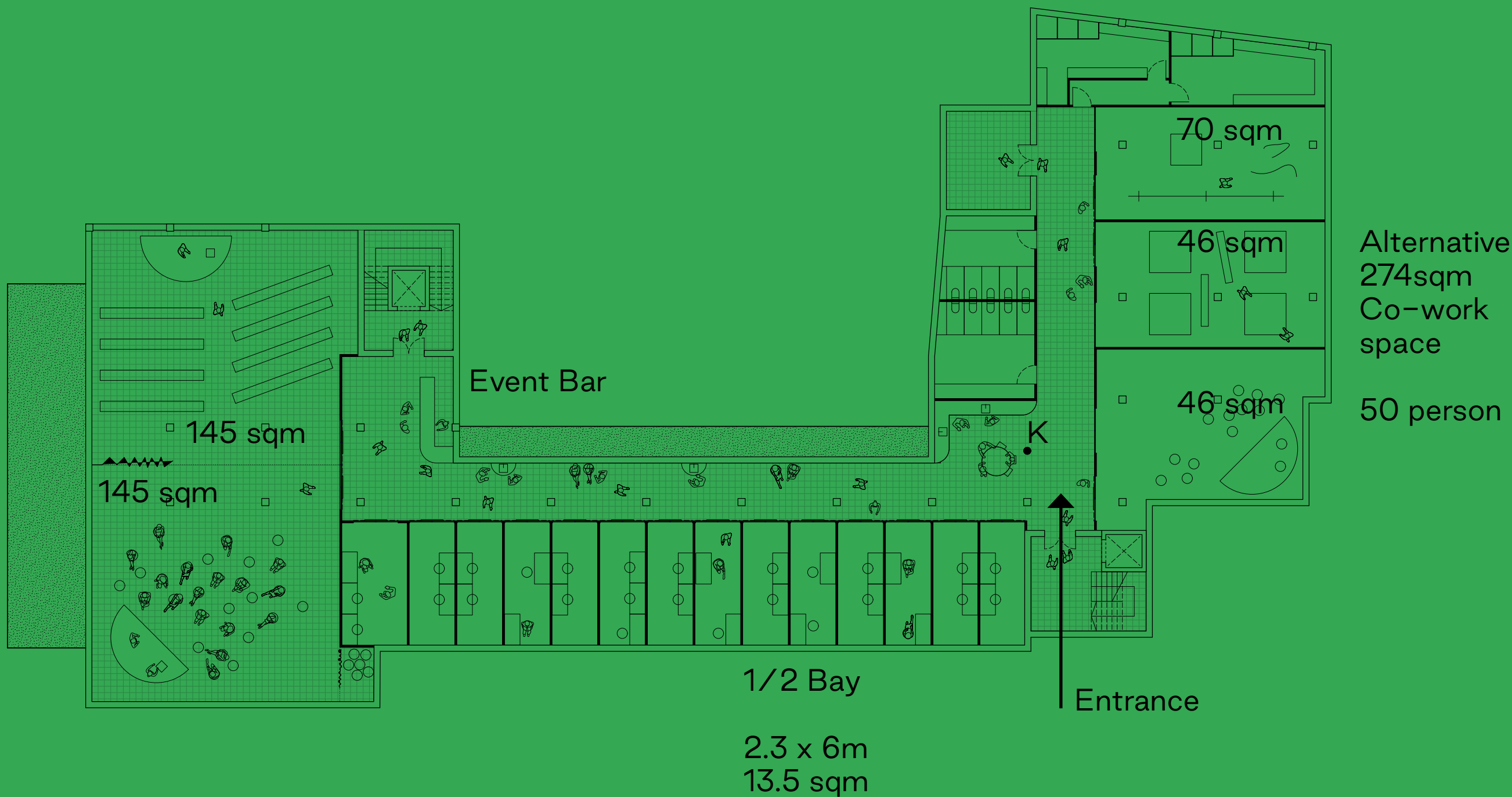
Building Potential – Third Floor

- As with the second floor, the third floor requires basic services provision and interior works before it can be used
- This floor has great potential to offer more social uses as part of the second and third floor collective workspace offer. The end units are very suitable to host these, making great use of the existing balcony that could then be accessed by all users
- Offering more active or social uses on this floor would also use the higher ceiling and lack of overlooking, making it possible to invite more vulnerable community members to congregate in private
- The multiple staircases and lifts ensure that this floor is fully inclusive and accessible
- As the middle part of the building is very slim, offering a maximum of small units would unlock the potential of these spaces best

**Third Floor**

Area: 1070 sqm

Workspace	187 sqm
Events Space	277 sqm
Wellbeing Studios	205 sqm
Changing Rooms	42 sqm
WC	40 sqm
Circulation	268 sqm



Third Floor
Area: 1070 sqm
Capacity circa 78 people
Events / training circa 400/month

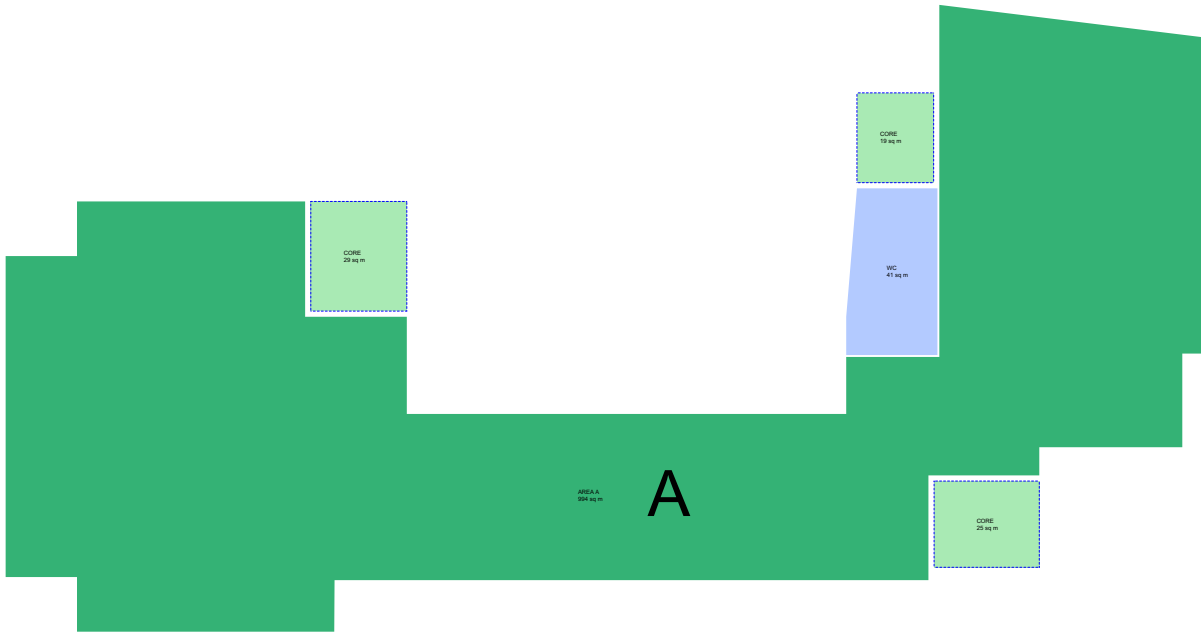


Offering some more public facing uses such as hot-desking and well being creates the necessary footfall and visibility



Multi-use public facing spaces are a valuable asset for the wider population to be invited in from time to

FLOOR LET TO 1 USER

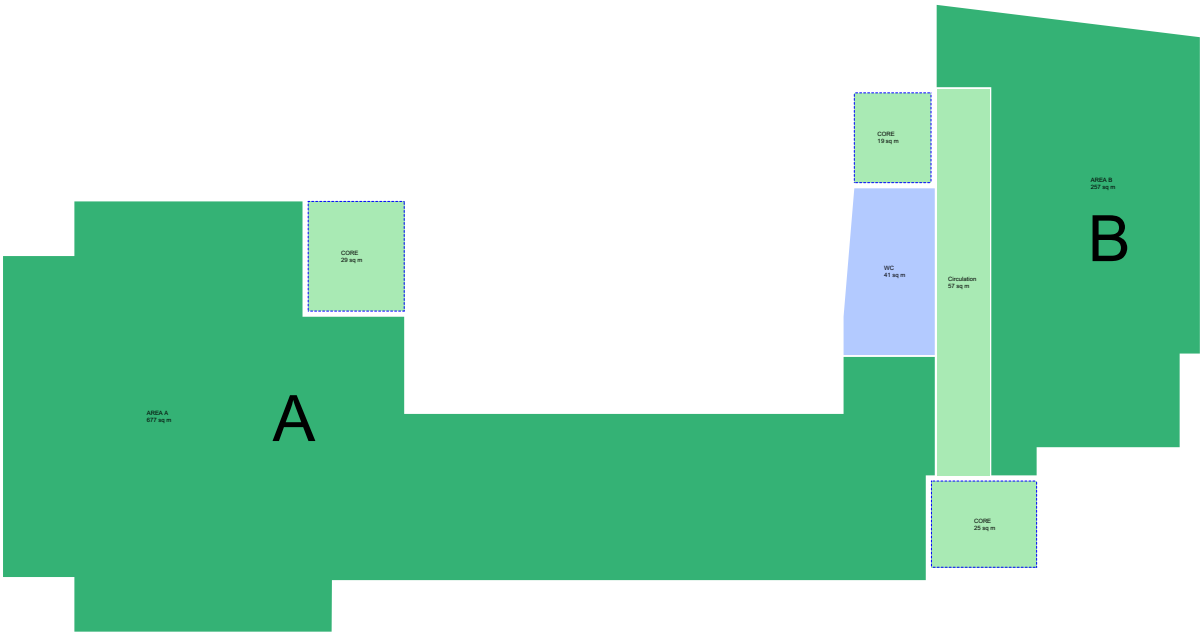


Area Schedule

Workspace	994 sq m
Circulation	74 sq m
WC	41 sq m
Total	1109 sq m

Floor Zone Diagram 1:
Floor Let to 1 User

FLOOR LET TO 2 USERS

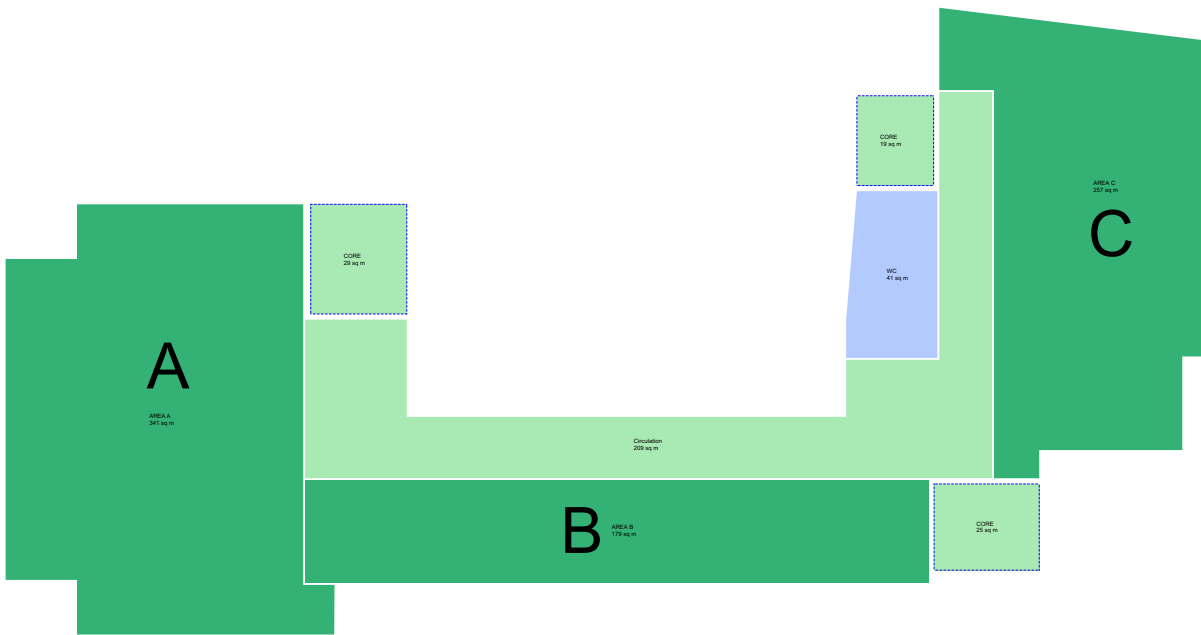


Area Schedule

Workspace	934 sq m
Circulation	131 sq m
WC	41 sq m
Total	1106 sq m

Floor Zone Diagram 2:
Floor Let to 2 Users

FLOOR LET TO 3 USERS



Area Schedule

Workspace	777 sq m
Circulation	283 sq m
WC	41 sq m
Total	1101 sq m

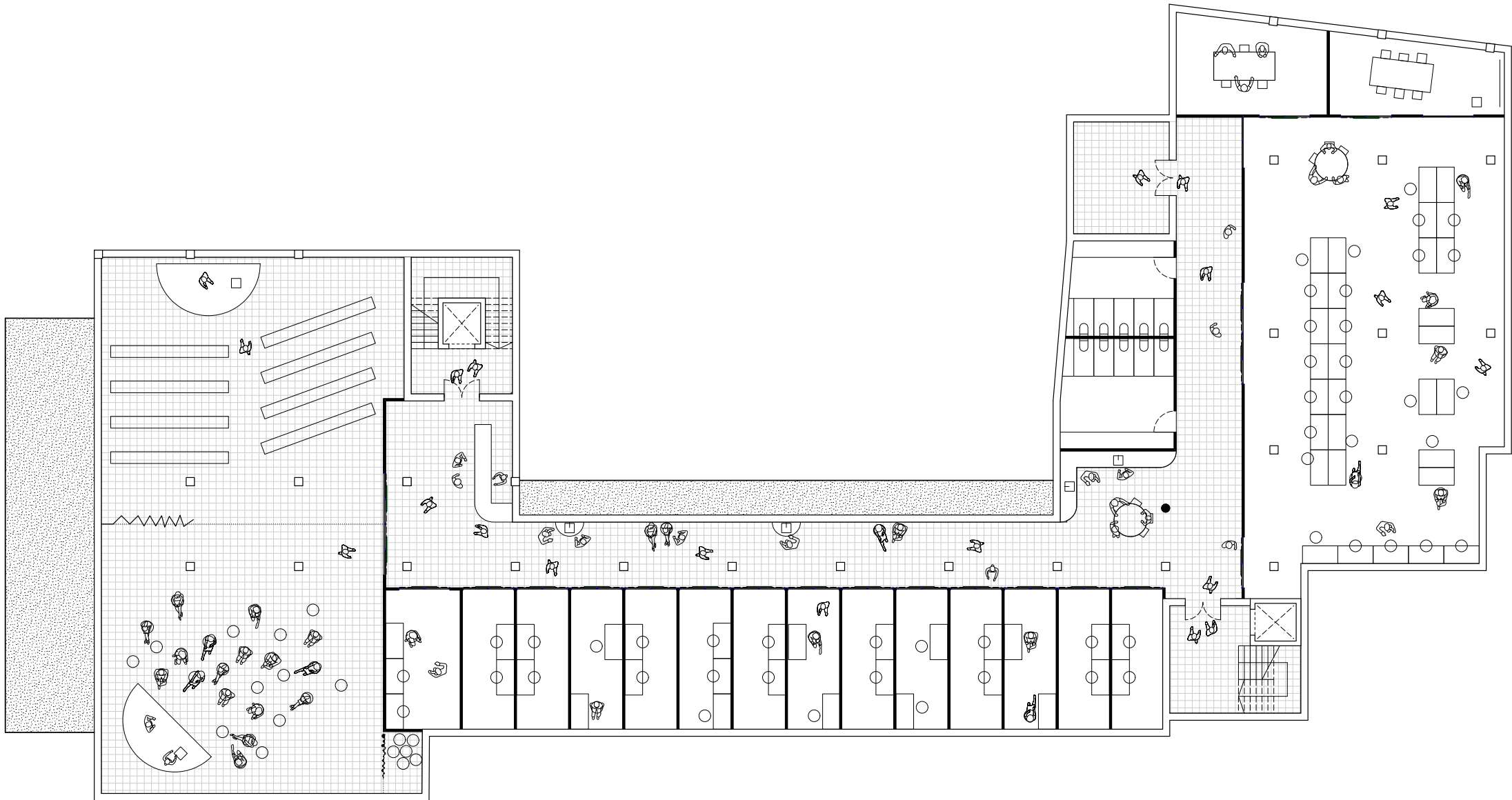
Floor Zone Diagram 3:
Floor Let to 3 Users

Larger uses on second or third floor –
Option study

The tested scenarios show that the upper floors can be split flexibly depending on the future businesses who declare interest in the available spaces.

The test fit also confirms that these uses can be combined as needed and can be exchanged over time.

Diagram 3 is the least successful with area B forming a long thin space better suited to splitting into multiple smaller studios.

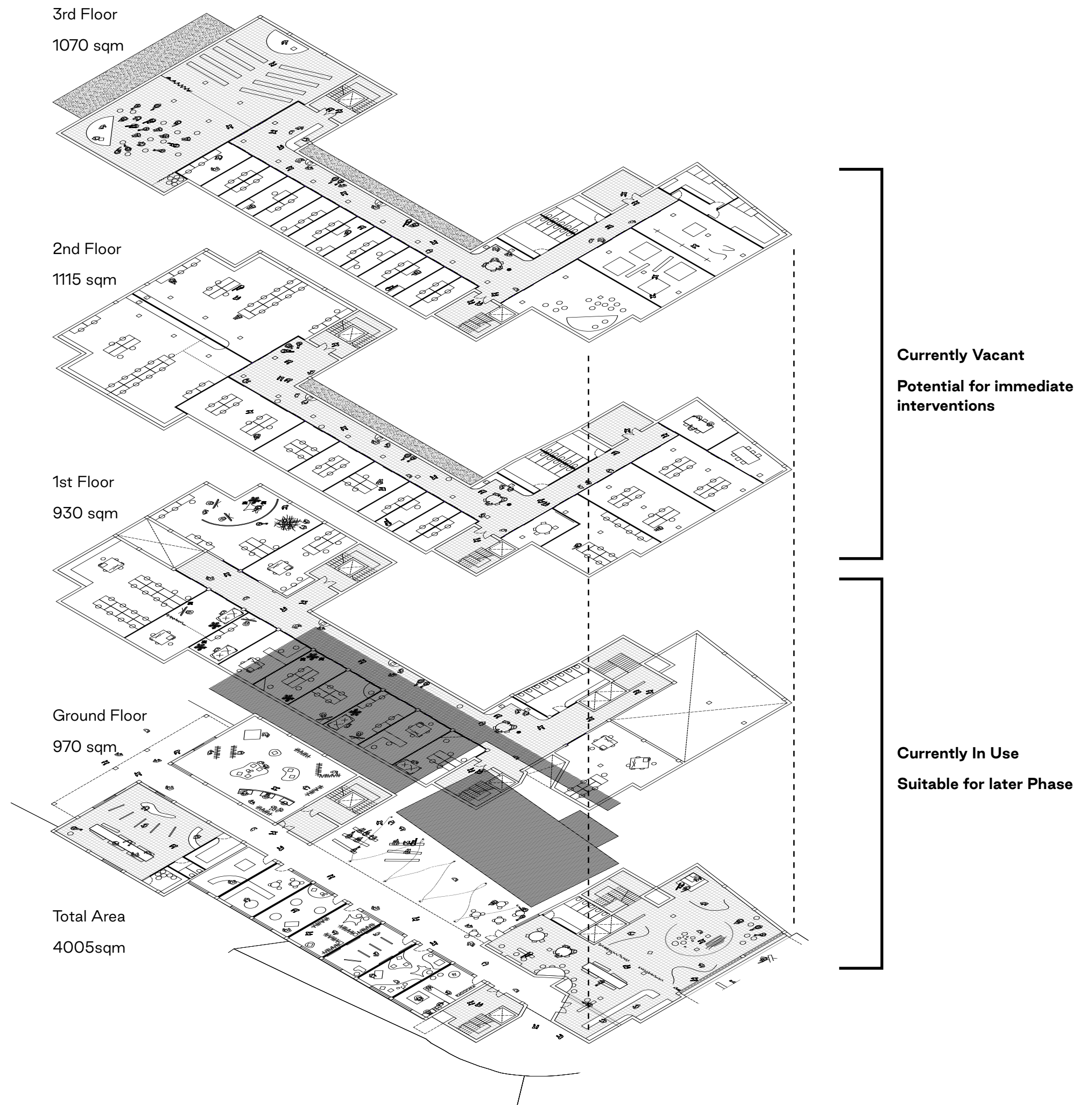


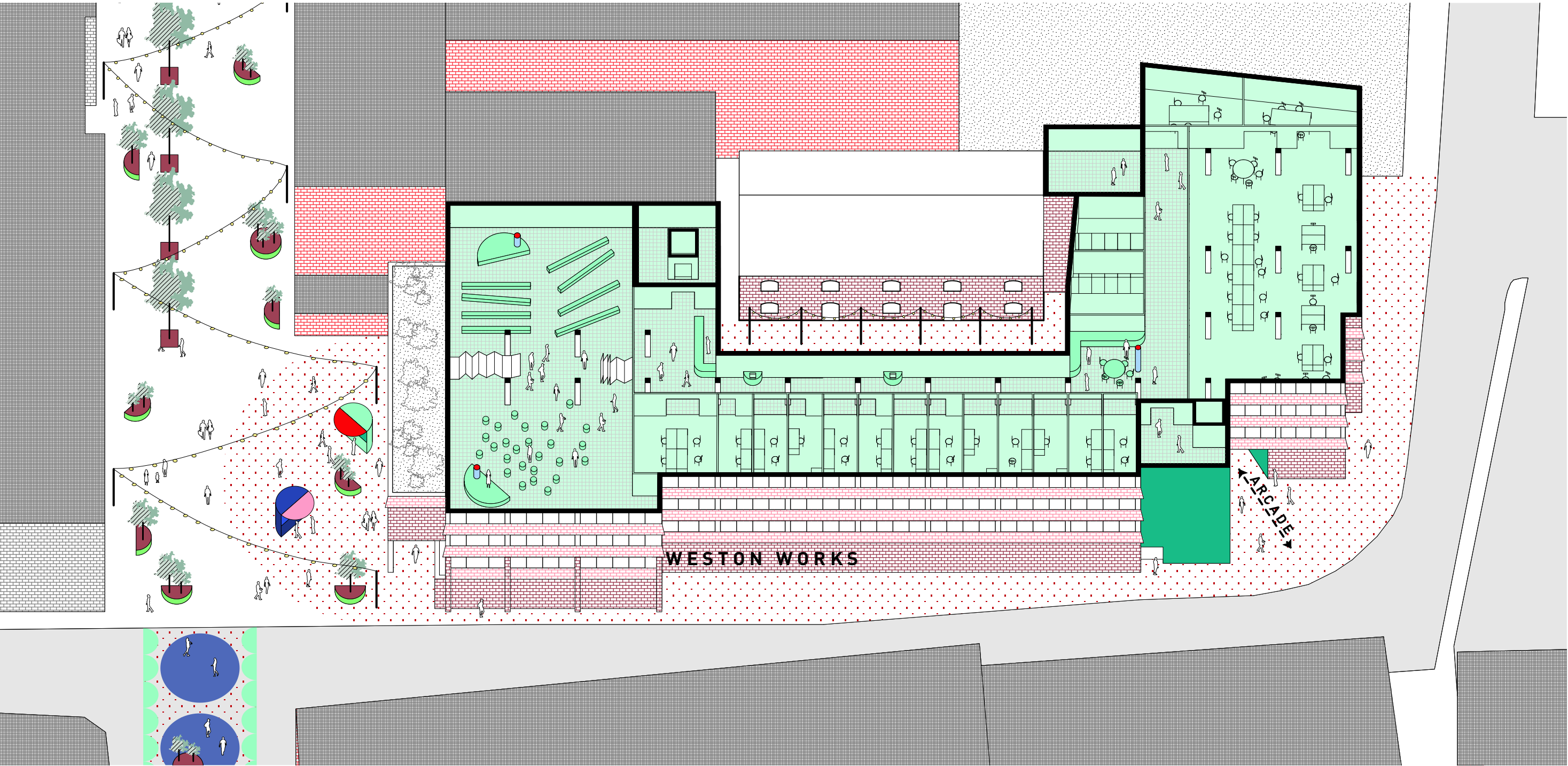
Floor Zone Test Fit for flexible plug-and-mix of uses as per Diagram 3:

Area C is let to 1 larger tenant or co-work space, multiple smaller units in area B, and a training and event space provides outreach in area A.

Building Potential – Conclusions

- The building would best be activated in two phases, utilising the currently vacant upper floors as soon as possible, and then integrating the lower floors as they become available
- The three staircases and lifts make this building fully accessible, inclusive and fire escape compliant for a large number of inclusive community events and users, a huge asset for any future use
- The variety of different spaces allows for a flexible approach to space planning that can be amended as interested users come on board. For example, if a user requires a larger unit, this can easily be accommodated
- Generally, many small units will unlock the social potential of the space best, allowing a maximum number of local entrepreneurs and creatives to get access to much needed workspace
- The three different entrances allow the building to offer distinct and different entrances for events while physical distancing are still required and also allow for a one way system to be implemented with one “up” and one “down” staircase for maximum hygiene
- The Test fit has confirmed the flexibility and versatility of the building
- Keeping this structurally sane building and re-activating it for socially relevant uses is a great chance to preserve the embodied carbon that is currently stored in the building for the future



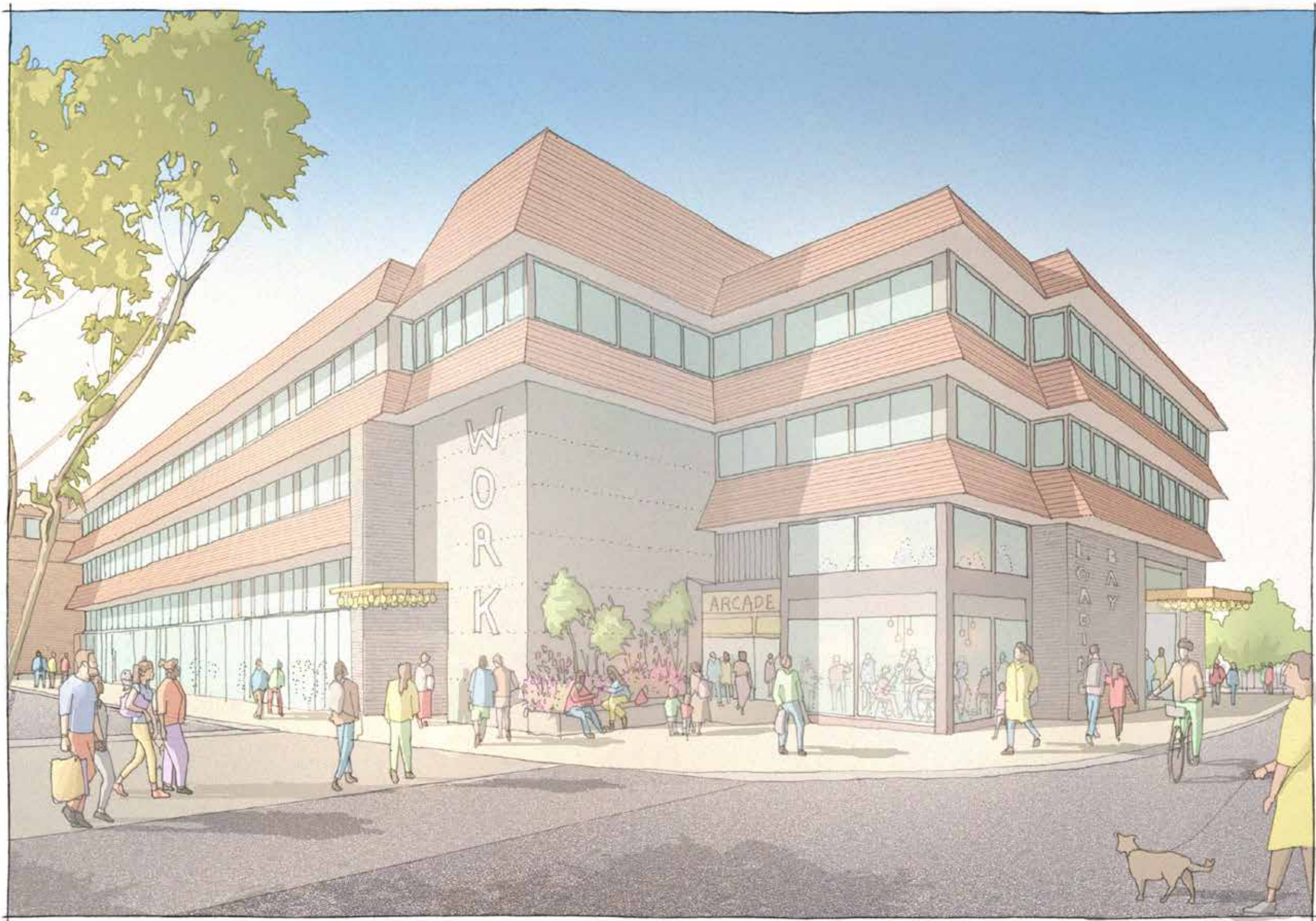


Winchester Works

- Studios**
- Co-work space**
- Workshops**
- Talks & events**
- Improved retail offer**
- Street activation through visible ground floor uses**



Visualisation showing a meanwhile approach to activation of a revitalised foyer space at the entrance to King's walk



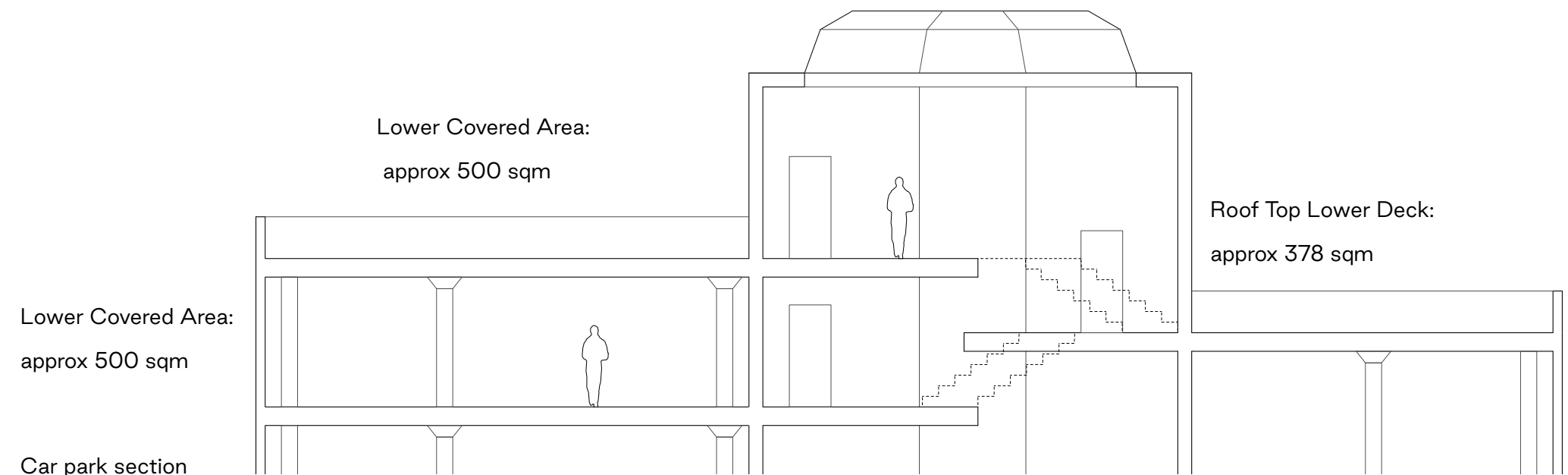
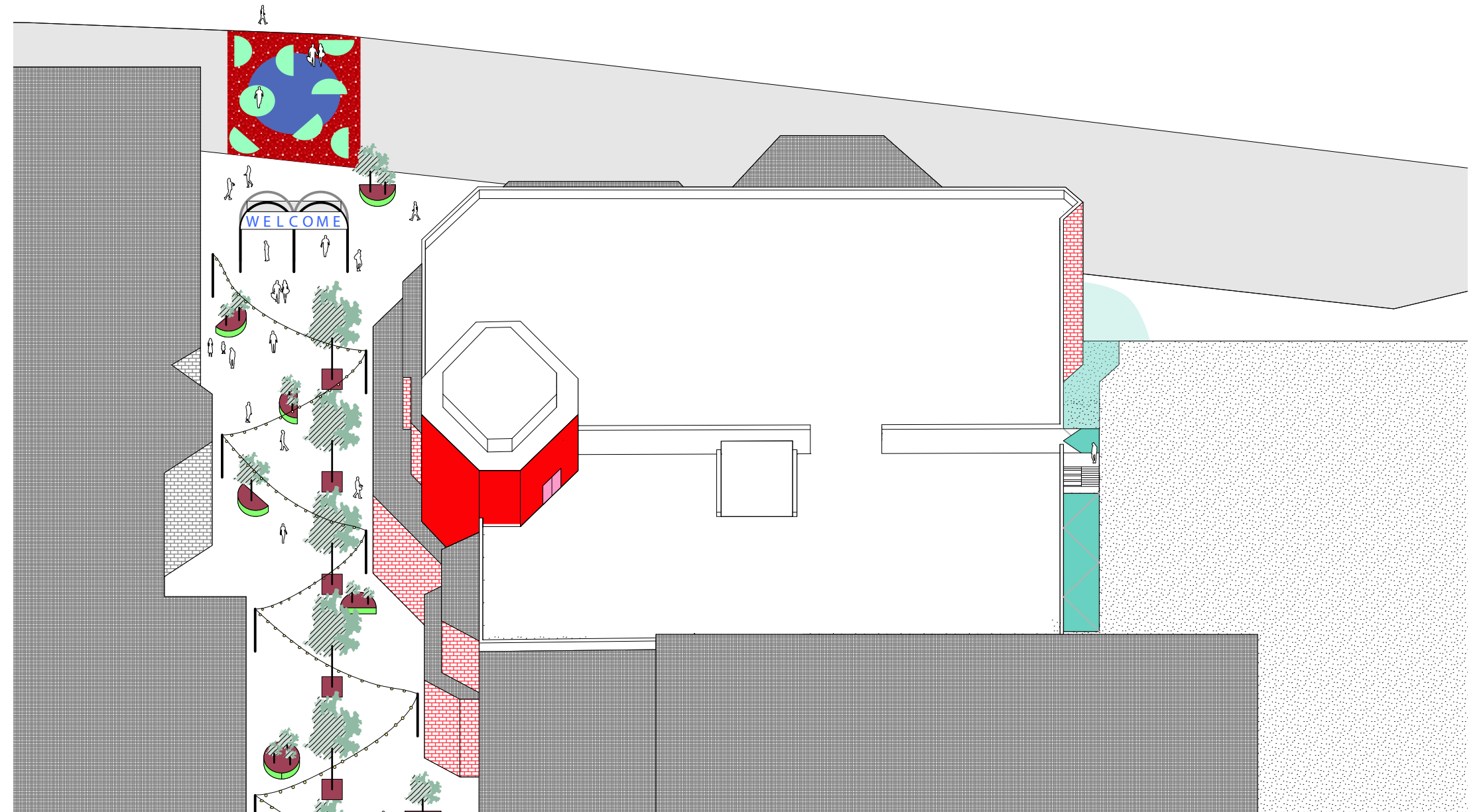
Visualisation showing how the entrance to the new workspace might look and increased glazing to Silver Hill.

3.3 Multi-Storey car Park

Existing Building observations

- The multi-storey car park has an existing use on ground floor and currently vacant upper floors. These empty floors have been assessed
- As coronavirus increases the amount of outdoor space for all residents to meet and spend time in, the open to the air car park decks are now especially desirable assets in Winchester's town centre
- The landmark stair tower has great potential to turn the upper car park decks into a destination if the entrances are enhanced
- A second stair tower via the lower level car park will be necessary for physically distanced circulation and a secondary means of fire escape
- The split level arrangement of the car park allows for good visibility across levels and generates a feeling of openness

The building is structurally useful and capable of holding a variety of uses. However, as the former use was a car park with different loads, a structural assessment needs to be undertaken to determine if the current structure allows for the proposed extra live loads.





Exterior of the end of the car park – this is the ‘new’ metal end wall where they cut the old car park in half – as you can see, no entrance / exit.



Interior of entrance lobby. Two lifts, not currently functional. The car park is split-level, so there’s approx 8 flights of stairs to roof level.



Current (and only) access via single door at ground level – possible to widen slightly, but the stairs upwards would prevent a full double door width.



Top door out onto the roof.



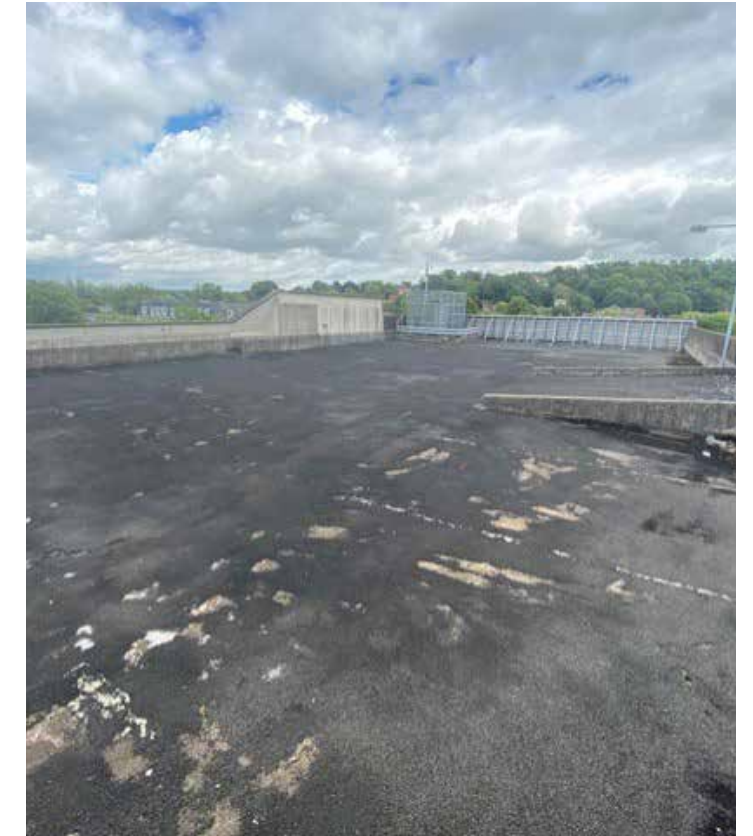
The stair tower is very visible and has huge potential as landmark, even at night time.



Lower level roof, looking west. Approx 2.5m to top of wall between levels.



Upper roof level



Level underneath the upper roof. Note ramp up to lower roof on right – also note there is no ramp down to level below.



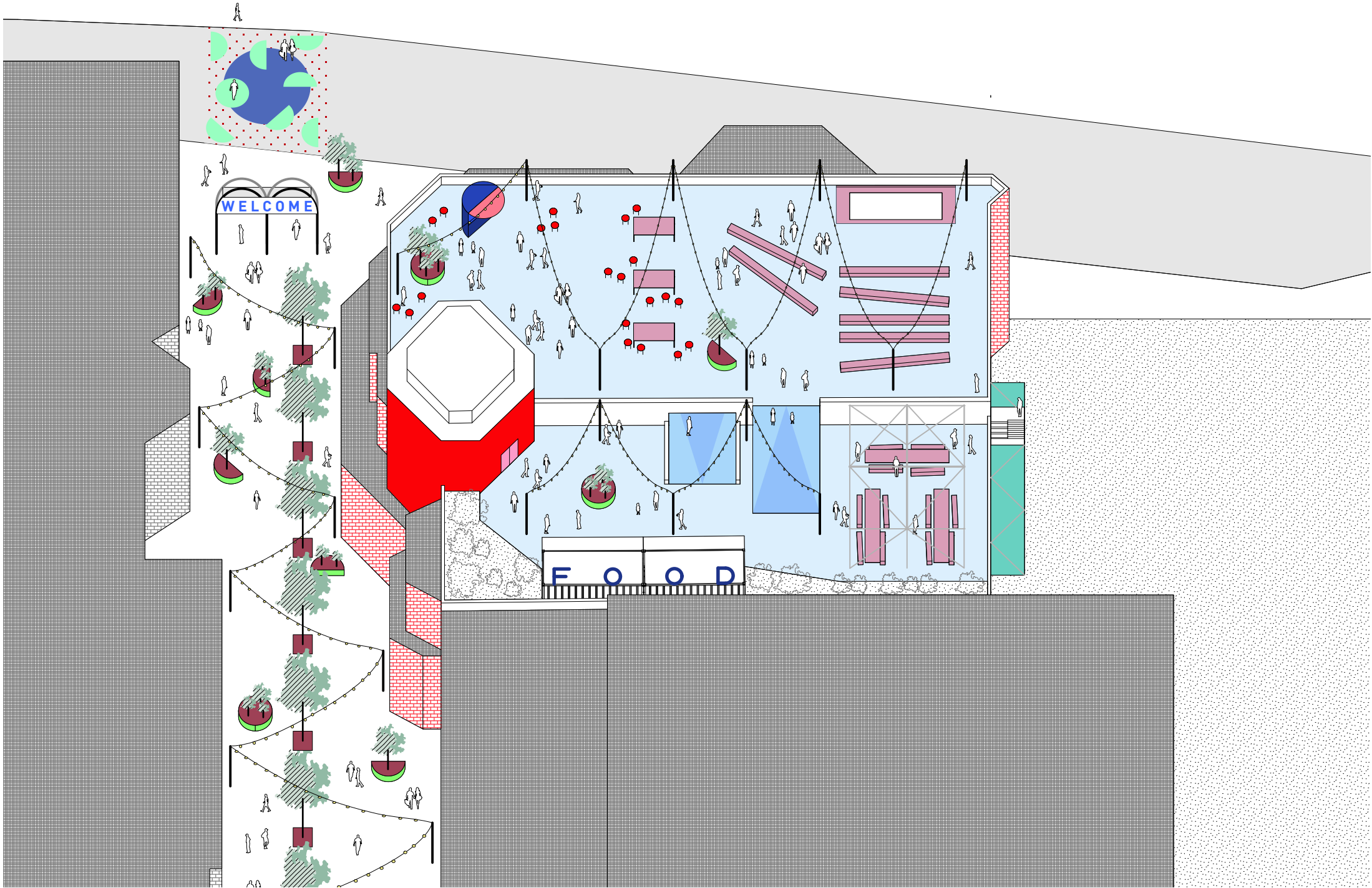
The building has been effectively sliced in two and capped with a metal wall.



There is an air con unit in the north eastern corner of the roof.

Building Potential

- During the coronavirus pandemic it has become clear how valuable safe and usable outdoor space is for a town's population to meet and socialise. This makes this building an extremely valuable asset. While the existing use on ground floor could be retained, the upper floors could be safely activated immediately with short term events and later with more medium to permanent uses.
- The landmark stair tower could be cleaned up and illuminated to quickly turn it into an address for the new location. A second stair tower towards the lower car park could increase visibility from the other side whilst offering the second fire escape route required over a certain amount of visitors.
- The ground floor front door could be enhanced and made more visible. While it is important that the entrance is findable, keeping it low key, "a place one needs to know about", will most likely enhance its attractiveness.
- The split level arrangement of the car park could be used to create multiple micro locations with different themes and aimed at different age groups or part of the population.
- The covered lower half level has special potential as sheleterd outdoor space to offer safe play and hang out spaces for youths and young adults, an age group that is often overlooked between playgrounds and more adult entertainment offer.
- As holidays will be spent predominantly at home this year, the car park could contribute enormously to the holiday offer. Simple uses such as skating, acting, or building in this unique location might be a welcome, low budget addition to the current leisure offer.



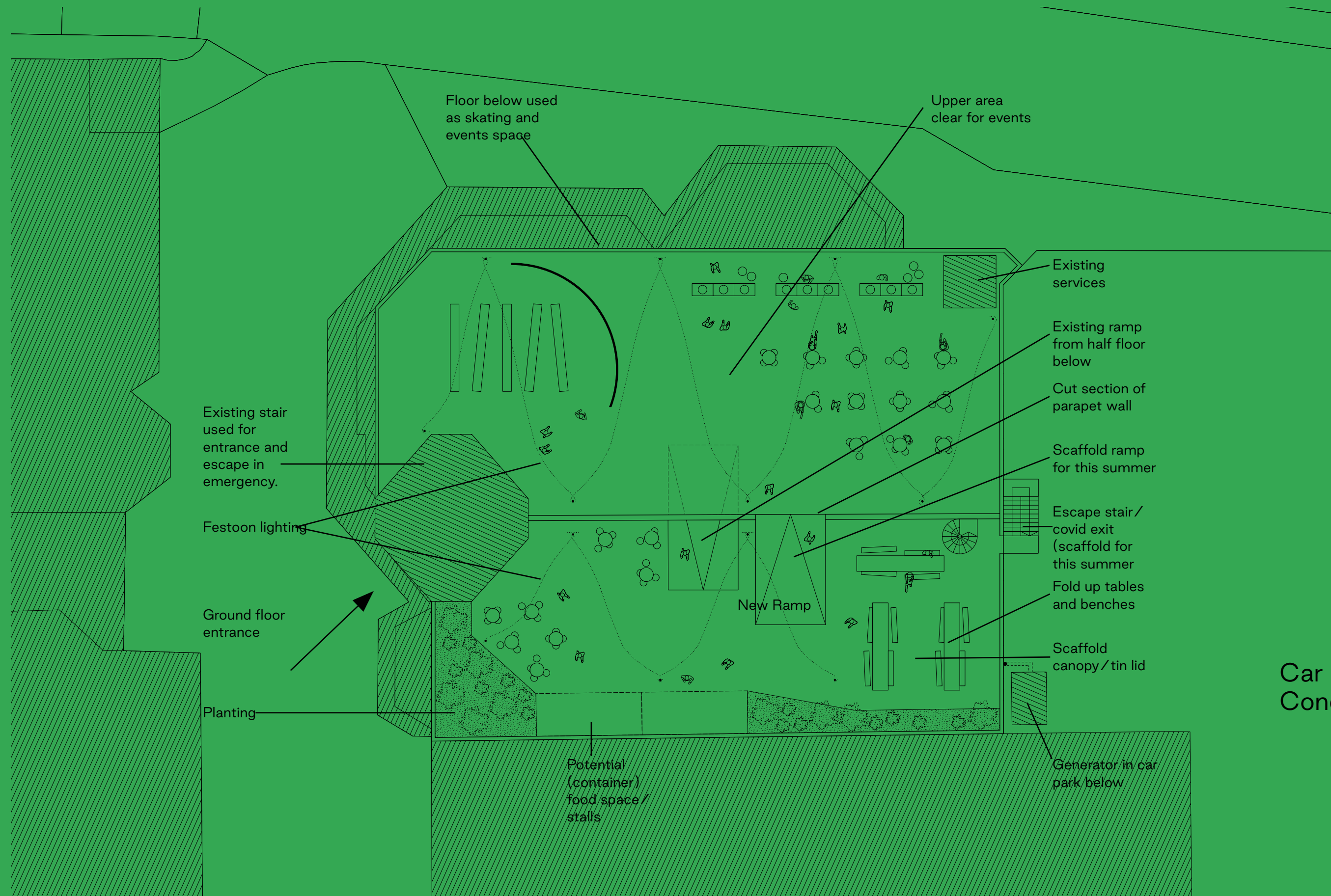
Rooftop Events

Arts

Summer cinema

Green space

Street Food



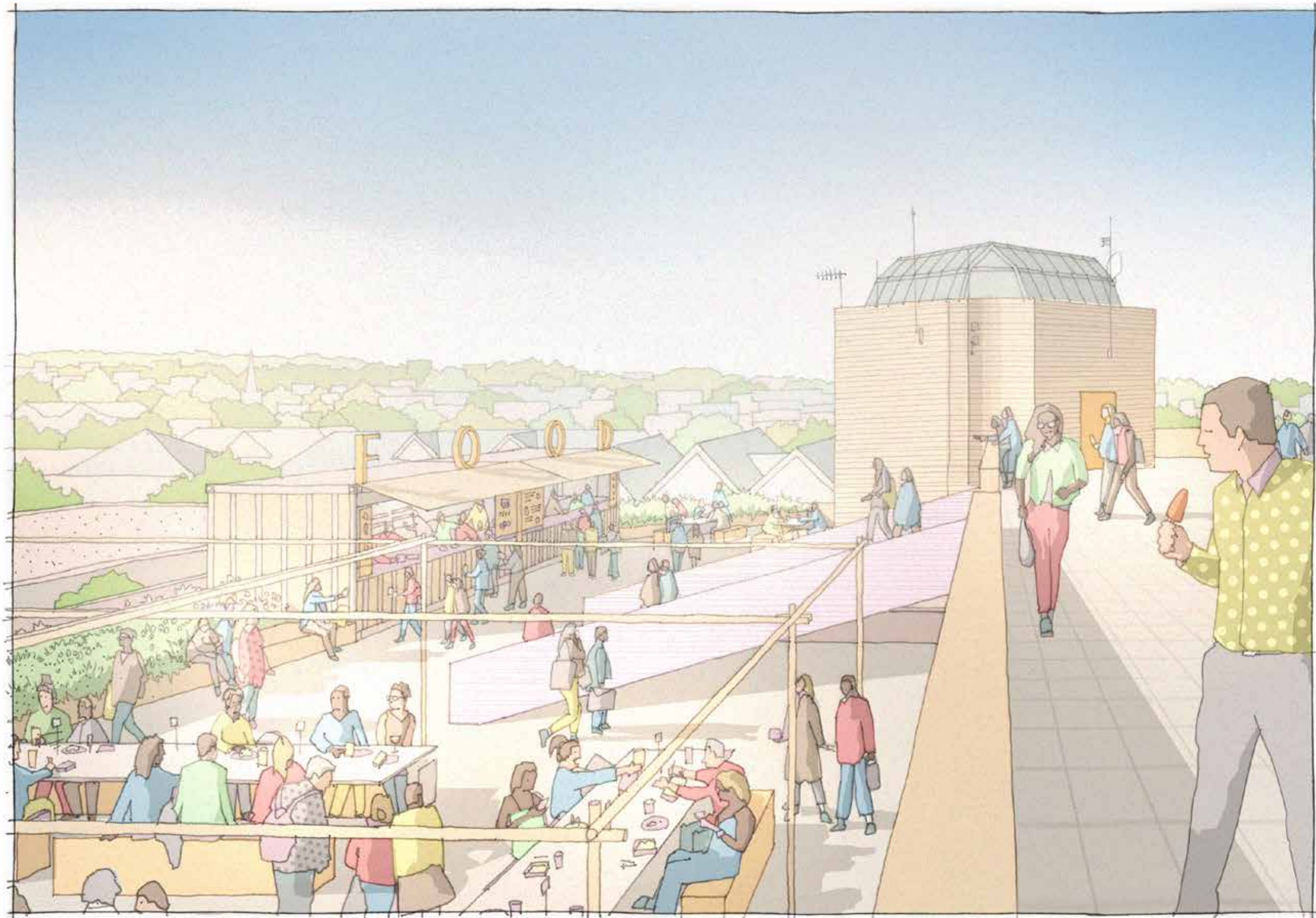
Car Park
Concept Plan



Open to the air gathering spaces are the most sought after places during the coronavirus pandemic.



As travel is restricted, offering activity of all kinds could significantly enhance the quality of life in Winchester, especially for younger people.



Visualisation showing how the roof might be used as a semi-outdoor public space for Winchester.

4.5 Phasing

A flexible framework

The space analysis has confirmed that there are 4 separate projects within the King’s Walk creative quarter. Depending on the availability of funding, the ongoing health crisis and demand, these four projects could be brought forward in several ways dependent on local priorities.

Phase I: Activation of the Middle Brook street as pocket parks

This could also be Phase II. A meanwhile approach to quickly transform Middle Brook Street using ‘pocket parks’, seating, lighting (such as festoons) along with art and graphics to create a place to dwell, particularly in light of Covid and an identified lack of public seating in central Winchester. This could be the point of difference here, while the more long term refurbishment of the area happens over time as the masterplan is gradually implemented.

Phase II: Workspace on King’s Walk floors 2 and 3

Floors 2 and 3, currently vacant former workspace. Services and finishes have been previously stripped out.

Re-purpose as incubator workspace including a mix of studios, larger work spaces, meeting rooms, co-working and social spaces creating a membership offer beyond an individual desk or self-contained studio space.

Create a stand-alone entrance from Silver Hill giving the potential for autonomy of operation and 24 / 7 access if required (delineated from the retail arcade below)

The second floor we propose an optimum number of units, rather than cramming as many smaller units in as could conceivably fit along the south wing. This provides a range of unit sizes.

The third floor with its really good views lends itself to the more public elements of the incubator hub. Here we place a co-working space for circa 50 people along with meeting rooms, a small bar and event spaces suitable for exercise classes, TED type talks, member events or invited events, small screenings etc. Here we suggest maximising the number of half bay units along the south wing to take up the slack in terms of overall density.



Phase IV: Meanwhile use of the multi-storey car park

The car park above Iceland. This could be a unique and exciting addition to Winchester, initially maybe as a summer event space and mid-term as a place for people to visit, hang out and enjoy the views. It could be a lovely garden in the sky providing post-Covid outdoor safe space, a summer outdoor cinema, food trader space, place for skateboarders and for general arts events. The car park in Peckham hosts an annual offshoot of the Proms.

Phase III: Improved ground floor and Maker units on King’s Walk floor 1

Currently ground floor retail units have upper parts used for storage or additional retail at first floor level. Our recommendation is to split these units to create stand-alone ground floor units for retail, F&B or other uses and to convert the upper parts to additional studios, perhaps for artists or makers with a simpler level of fit-out. These spaces have the use of existing goods lifts for access and can utilise the workspace entrance from Phase I.

The spaces can be converted as the existing leases become available and some occupiers may be suitable / may wish to remain in the new configuration.

The smaller units at both levels will thus be more affordable and create wider opportunity. The two larger units fronting onto Middle Brook Street need to act as attractors, and we suggest the corner unit could be used at least initially as an urban room, providing exhibition and event space accessible to the public for the City and acting as a shop window to the emerging plans for a new creative quarter. We also suggest the existing loading bay and adjacent unit could be converted to provide a small event space / bar creating active uses at either end of the arcade.

The second phase should also include a makeover of the exterior of the building, using low cost techniques such as paint and graphics, with perhaps a new covered entrance area in place of the small and not very effective glass canopy. This could provide space for year round seating and activation of the street corner, leading into a rejuvenated arcade.

- Rooftop Event Space
- Start with weekends
- Food
- Music
- Events
- Markets
- Art

- Meanwhile Street Activation
- Parklets
- Festoon lighting
- Bespoke furniture
- Greening
- Graphics
- Art crossings

- Winchester Works
- Studios
- Co-work space
- Talks & events
- Improved retail offer
- Street activation



5.1 Recommendation • Worthwhile Works

The question of how to maintain and develop a dynamic diverse mix of space and facilities for cultural production and consumption within the harsh realities of the real estate market is a challenge for Winchester.

It's all about balance.

Financially Sustainable + Genuine Creative Soul = Long term success

Our view is that Kings Walk quarter needs to have a coherent and long-term vision, aesthetic and social purpose if it is to attract and sustain the right mix of businesses, creatives and entrepreneurs.

Critical to success of Kings Walk is not just good design, it needs soul and purpose too. A soul that is financially sustainable, whilst serving the community it was designed for.

A creative vision for the building and its long-term public purpose with defined objectives will create a financial and administrative framework for success. For example:

- Objectives set to incubate an agreed number of new businesses over a set period
- Create a pathway for creatives to progress from fledgling to commercial success
- Be a gateway for businesses and individuals into the creative sector
- Support and uplift grassroots arts organisations in Winchester
- Attract new workers and creative businesses to Winchester
- Champion the creative sector in Winchester and promote its economic contribution

5.1.1 SUMMARY

The creative community is spread across Winchester in small isolated pockets which reduces visibility and its creative potential. Many people have commented that it is 'hard to access' the creative community.

This isn't just about filling desks and artist studios – there are no shortage of operators interested in running the space. To be considered a cultural quarter aimed at young professionals, it should attract a critical mass of businesses either from the creative industries and start-up entrepreneurs.

Consideration should be made that larger or more commercially successful businesses in the space pay a premium in order to support the incubation of new and emerging businesses.

There is a high level of interest in the building from a range of operators who can all bring different skillsets to Kings Quarter. From workspace providers, arts organisations, creative agencies, retailers, food & drink providers, we contacted over 50 stakeholders (local, regional and national).

Some are in a position to buy the building outright, some would need to raise funds to fit out and run the space. What Winchester City Council need to be mindful of is choosing the right operators to run the space – balancing commercial viability with the needs of the community it was designed for.

With regards to the Kings Walk Building we see two main options – and also recommend Kings Walk considers becoming a Creative Enterprise Hub.

OPTION 1

Handing over responsibility for the entire building including retail and entertainment spaces to one overall operator.

Whilst there is an attraction to the simplicity and financial certainty of bringing in one major operator to take overall responsibility, this is likely to require an operator of scale from outside the region, or an operator who brings a "one size fits all" approach and risks diluting some of the buildings potential public purpose and ability to support the local creative community.

Or one operator working in collaboration with local partners. Whilst a developer may meet obligations in the short-term, there is a long-term risk of a creative quarter being sold off – as is what happened in Birmingham's Custard Factory.

OPTION 2

To divide the building into key functions and bring in a suitable operator for each function (or groups of functions) for example: one for work/studio space, another to curate the retail offering.

This more flexible approach allows a greater chance of working with local organisations and business who may be able to deliver one element of the offer for example bars and entertainment, to a high standard but who would not be appropriate to run other aspects of the building.

However, this approach requires greater amount of involvement and potentially carries less financial certainty (for example, if working with smaller scale operators or shorter leases).

It is our view that a segmented and curated approach gives the best possibility for each element of the creative mix in the building to shine.

We recommend a management structure for example, an advisory board or consortium is created to ensure the curation, operation and marketing giving it the best possibility of meeting its vision and targets.



Cockpit Arts in Deptford is a highly successful maker space home to 140 creative businesses who collectively generated £6million in annual sales in 2019. It offers incubator support and regularly attracts buyers from retailers including John Lewis, Liberty, Selfridges.



Creative Enterprise Zones are a London Mayoral Initiative to designate areas of London where artists and creative businesses can find permanent affordable space to work; are supported to start-up and grow and where local people are helped to learn creative sector skills and find new jobs.



Culture has played a starring role in Sheffield's transformation. Cultural institutions and organisations of all sizes have been influential in giving Sheffield scale and diversity of programming and activity.



Kings Walk Winchester Feasibility Study

Stakeholder insight:

“Do not have an eclectic mix of activities in Kings Walk e.g. dry cleaners, teenage games gallery, potter. It does not work. Take control, have a vision and it WILL work. Make sure if you give help to fledgling businesses to get started, that they really have a proper plan, contingency funds etc. Don’t assume that anyone in the right sector will do – select carefully those that you help.”

Creative Enterprise Zone

The Creative Enterprise Zone (CEZ) would provide a focus for businesses, students and graduates alike who are eager to start and build their own creative business.

The CEZ initiative could provide investment and support for creative businesses, ensuring that Winchester remains one of the most entrepreneurial and innovative locations in Hampshire.

The CEZ would:

- **Protect the creative sector in Winchester**
- **Increase affordable spaces for artists and entrepreneurs**
- **Boost job and training opportunities for local people**
- **Better connect and amplify the creative community**
- **Support creative businesses to develop stronger roots and more sustainable practices.**

The CEZ would operate by working in partnership with local Universities, Chambers of Commerce, Business South, Trade Bodies both regionally and a nationally.

Picturedome, Macclesfield

Historical Context

In 2010 Local entrepreneur Emily Tyers set up Winchester Umbrella, an informal online network aimed at connecting the creative sector. The launch attracted over 400 local creatives to The Great Hall. The long-term vision of Umbrella was to set up a creative hub, however at the time space and funding was not available.

The idea of a Creative Enterprise Centre has been considered before by Winchester City Council, who in 2017 earmarked Bar End goods shed as a potential site. The project was not progressed as the scheme missed out on DCMS match funding, needed to progress the redevelopment of the site.

In 2017 Cllr James Byrnes, Winchester, said: **“We have been waiting for the right space for this project for a number of years, and this charismatic railway building provides the perfect opportunity.”**

This demonstrates that there has been local demand for a creative hub for some time but it was simply the wrong time and place.

5.2 Next Steps • Turner Works

We have identified 4 projects, all interlinked, but potentially independent.

These are:

- Winchester Works – the upper floors of the Kings Walk building
- Kings Walk retail, yard and first floor art spaces
- Activation of Middle Brook Street and Silver Hill
- Multi-storey car park rooftop events space

Each project will need to be commissioned beyond feasibility in terms of design, delivery and funding.

Program:

If the workspace design is commenced quickly, the project could be on site as early as late spring / summer 2021, completing by the end of 2021 with a fair wind or spring 2022. Design work for the ground and first floors could be bundled into this piece of work, but with a phased delivery beyond the workspaces.

Similarly, appointment of a design team for the meanwhile public realm design in early autumn 2020 would suggest that these works might be implemented early in 2021, ready for say Easter.

The same approach / time frame applies to the car park roof, if that is to be ready for summer 2021.

Next steps should be to determine the appetite for each constituent part and work back wards from a desired delivery date. Funding then needs to be identified to allow design up to RIBA Stage 3 or 4 dependent on delivery route, and a design team or teams appointed to move the project forward.

A full digital survey of Kings Walk needs to be undertaken and this can take time so we suggest this could be undertaken immediately.

A design team will probably include at least:

- Architects
- Structural Engineers
- M&E Services Engineers
- Cost Consultant

Surveys should include asbestos (if not already undertaken).

This assumes the council carry out the refurbishment works to shell and core, with the selected operator(s) carrying out specialised interior elements and furniture only. These are council assets worth investing in.

Operator / Funding:

Our view is that operators will be able to deliver a more holistic outcome / blend of services and social value if the burden of major capital investment is not placed upon them. This was the enlightened approach taken by Ashford Borough Council with their Coach Works project, funding the bulk of development costs of around £1m. This has allowed the operator (Turner Works) to focus on outcomes rather than profit, although the model is an SPV of a limited company. A rent free initial model of circa 2 years with revenue share of 10% over 5 years has been agreed.

The site is now fully let after 6 months and delivering a diverse range of activities from Ashford's first vegan market, music events, a post covid large outdoor gathering space, an artist in residence, circa 70 jobs on site and a thriving weekend music, food and drink space.



Ashford Coach Works, Yard, Hothouse and Corn Store workspace.



Visualisation showing how the revamped yard and arcade might look with simple cost effective improvements.

Turner.Works AND WORTHWHILE WORKS