



Beyond the Central Belt:

A study of regional audience development needs in Scotland

Full Report

Prepared by Baker Richards Consulting for the Scottish Arts Council.

The views expressed in this report are those of the authors and not necessarily those of the Scottish Arts Council.

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1. Reporting conventions

This report has been prepared in accordance with the Scottish Arts Council Style Guide.

1.1 Purpose

The purpose of using a combination of consultancy and research was to provide an evidence base to inform the most effective allocation of resources.

In both cases the consultants have aimed to strike a balance between a comprehensive approach and not using a sledgehammer to crack a nut.

1.2 Caveats

Every effort has been made to apply transparent standards and to document the limitations of the evidence used and assumptions made throughout the report.

1.3 Tables

Column data is presented in alphabetical order, with the exception of table 4.1 which has to be presented geographically North to South so that the sub-regional markets correlating to one old Scottish Tourist Board region can be presented together.

1.4 Numerical conventions

Wherever possible data has been expressed in percentage terms and figures have been rounded to the nearest whole number.

2. Executive summary

In 1998, the Scottish Arts Council commissioned a report *Supporting Marketing and Audience Development*, which found that a history of under-investment had contributed to limited marketing effectiveness in many organisations and thus a failure to maximise attendance and participation. A principal recommendation of that report was that the Scottish Arts Council should 'develop a Scotland-wide network of regional support workers or agencies, providing low cost, quality services'. This commitment was formalised in the 2004 Audience Development Strategy, prior to which start-up funding had already been provided for two city-focused agencies: The Audience Business in Edinburgh and Glasgow Grows Audiences.

The Audience Development Strategy defines audience development as:

'a planned and targeted management process which involves programming, education and marketing (underpinned by research and evaluation) working together to deliver an organisation's overall objectives. Although crucial to delivering financial objectives, effective marketing and audience development also ensure that arts organisations continue to be relevant to all the different communities of interest they serve.'

In June 2006, the Scottish Arts Council commissioned this study with the following aims:

- Provide an evidence base to allow the Scottish Arts Council to meaningfully fulfil its commitment to a Scotland-wide audience development network,
- Inform the most effective allocation of resources towards the support of a Scotland-wide network based on:
 - Equitable geographical spread
 - Sufficient arts organisations
 - Sufficient arts provision
 - Sufficient audiences

The first phase of the study was to develop the Scotland-wide evidence base and review the current audience development network, through a combination of consultation and quantitative research.

The second phase of the study was to establish investment criteria in order to draw conclusions regarding the allocation of Scottish Arts Council audience development resources and provide recommendations including outline models and an action plan for the Scottish Arts Council.

2.1 Consultation: arts organisations

The consultation established a segmentation of arts organisations, to help inform prioritisation of investment, based on current practice and consequent ability to engage in collaborative audience development.

2.2 Consultation: audience development network

The consultation identified that, while the current audience development network is working successfully in the main, there are also some lessons to be learned. The desk research and consultation also identified that both The Audience Business and Glasgow Grows Audiences

had significant viability gaps, although it is understood that the situation of both agencies has since improved somewhat.

2.3 Quantitative research

There were two elements to this research used to develop a quantitative evidence base: market analysis and analysis of provision. This provided a comparative picture of 'shared marketplaces' around which collaborative initiatives might form.

2.4 Investment criteria

Once the criteria for investment had been established, data was applied from the evidence base that had been developed from the quantitative research in order to prioritise the allocation of resources. A set of additional criteria for the Scottish Arts Council to use when considering specific investments was also developed.

2.5 Conclusions

The conclusion was that the first priority for investment should be an expansion of the remits of Glasgow Grows Audiences and The Audience Business, followed by, in no particular order, investment in the North East and East Scotland.

2.6 Further consultation and outline models

A number of outline models, ranging from individual audience development officers or brokers through to independently constituted organisations, were presented as prototypes for development at consultation sessions in Aberdeen and Dundee, in order to inform final recommendations.

2.7 Recommendations

The recommendations can be summarised as follows:

The existing audience development network should largely continue unchanged.

Glasgow Grows Audiences (GGA) and The Audience Business (TAB) should expand their geographical remits to more accurately reflect the audience catchment of Glasgow and Edinburgh.

The Scottish Arts Council should work with the North East and East Scotland in parallel to develop collaborative initiatives.

3. Introduction

3.1 Overview

This report summarises the study into audience development needs 'Beyond the Central Belt' of Scotland, as follows:

- Section 4 outlines the method
- Section 5 and section 6 review the findings of the consultation
- Section 7 details the quantitative research and evidence base
- Section 8 outlines the criteria applied to inform investment
- Section 9 summarises the consequent conclusions
- Section 10 describes the outline models and consultation undertaken further to the conclusions
- Section 11 presents the final recommendations and action plan

3.2 Project team and steering group

The study was commissioned by the Scottish Arts Council and undertaken on behalf of Baker Richards Consulting by the following team: Roger Tomlinson (lead consultant), Tim Baker, Abigail Carney, Claudine Gawin, Liz Palles-Clark, Debbie Richards and Jenny Scudamore. For more information about Baker Richards please visit www.baker-richards.com.

The project team was overseen by members of the project steering group: Fiona Sturgeon, Head of Audience and Organisational Development at the Scottish Arts Council (lead officer and project manager), Joanna Baker, Managing Director of the Edinburgh International Festival and then member of the Scottish Arts Council, Ben Jeffries, Marketing Director at the macrobert, Stirling, and Kate Wallace, Senior Research and Evaluation Officer, Scottish Arts Council.

4. Method

4.1 Context

It is worth offering an initial note of clarification on how the project method responds to the project aims.

The first stage of the project (consultation and research) focused on delivering a Scotland-wide evidence base to inform the need for audience development support across Scotland.

The second stage of the project (including the conclusions, further consultation and recommendations for outline models and an action plan) focused on the second aim – the most effective allocation of resources towards a Scotland-wide network based on the outlined criteria.

4.2 Adaptation of methodology

During the course of the project a number of changes were made to the methodology outlined in the original tender, as follows:

It was originally envisaged that analysis of provision would require an email survey of organisations. The primary reason this approach was not pursued was because a more complete picture of the relevant organisations could be obtained by analysing Scottish Arts Council annual return data, rather than a partial response to a survey.

It was also envisaged that there would be clearly preferred outline models for the prioritised areas and that it would therefore be possible to explore these with potential funders and develop the outlines to the point of, for example, providing person specifications. However, the consultants over-estimated the speed at which it would be possible to proceed. While additional consultation sessions were undertaken with potential partners in Dundee and Aberdeen to assess potential interest and seek feedback on the outline models, neither session had strong views about a definitive model and rather felt that a longer time-frame was needed to develop locally owned solutions.

4.3 Desk research

Existing documents were collated and reviewed to inform the study, as follows:

- Information relating to the constituency and marketplace to inform the development of the Scotland-wide evidence base
- Reports to inform the review of the existing audience development network
- Feasibility studies, business plans and reports of collaborative projects to inform the development of outline models

Desk research findings are cited throughout this report as applicable and a bibliography is included as an appendix.

4.4 Consultation interviews

Consultation interviewees were selected in order to achieve coverage of the following:

- All sub-regional markets (see below)
- Range of artform/type, including crafts, dance, drama, festivals, Gaelic arts, literature, music, local authorities, Scots language, touring organisations and visual arts

- Range of scale, from large to small
- Combination of regularly funded, lottery funded and non-funded organisations

Consultation interviews were also undertaken with audience development agencies and post-holders to inform the review of the existing audience development network.

A total of 85 individuals were interviewed as part of the initial consultation phase, from 72 different organisations. 85% of interviews were conducted in person, with the remainder carried out by telephone. A list of interviewees is included at Appendix 1.

The key aim was to undertake a needs analysis as part of the evidence base by identifying:

- What is current marketing practice like?
- Is there evidence of audience development?
- What help do people think they need?
- What help do the consultants think they need (and could this be met through collaborative initiatives)?

Following the consultation, three segments or groups of organisations were identified: 'Publicity', 'Tactical marketing' and 'Strategic'. The latter two groups were deemed to have the ability or potential to engage with collaborative audience development.

It was agreed that subsequent analysis of provision should focus on Scottish Arts Council clients (where change can be influenced) alongside other 'Tactical marketing' and 'Strategic' organisations. This was not to say 'Publicity' organisations would be excluded from a potential solution, but merely an acknowledgment that solutions needed to be built around organisations with the ability or potential to engage in audience-focused activity at a strategic level, rather than those consumed by immediate sales concerns.

4.5 Quantitative research

There were two elements to this research: market analysis and analysis of provision.

4.6 Market analysis

For collaborative approaches to audience development to work, there needs to be some shared interest or commonality. To date, it has appeared that at least one of three criteria has to be met: shared catchment area; shared character of audience (or art-form) and/or shared use of services. The desire to collaborate appears to decline through these three.

Unfortunately, catchment areas do not form around administrative boundaries such as local authority areas, but are more likely to reflect transport links, provision and the market's historical habits. Therefore, a key element of the project was to identify and analyse the shared markets around which collaborative initiatives might form.

Consequently, the project team identified a series of potential 'sub-regional' or shared markets across Scotland for analysis (see table 4.1). Of course, many of these markets overlap (they are not discrete) and many attenders at the arts are visitors who do not live in the catchment area (so the picture is not complete). However, it was necessary to find some means of considering the shared markets around which collaborative initiatives might form (comparison of individual towns was rejected on the grounds of complexity and because they would overlap countless times). So, this is a blunt instrument, but sufficient to inform the investment criteria: while the sub-regional markets are not mutually exclusive, they do offer a comparison of the audience development conditions facing organisations within each area.

In order to analyse the sub-regional markets, a series of ‘nodes’¹ were selected in order to commission area profile reports. The nodes are not necessarily centred on hubs of provision because they were chosen to provide the maximum geographical coverage of Scotland.

Area profile reports were then commissioned accordingly, which provide information on the population within the node catchment and on the population’s likely propensity to attend the arts. The reason for using area profile reports is because Target Group Index data (TGI)², from which these are derived, is the only data set available for analysing the market at this detailed, ‘sub-regional’ level. *Taking Part*³ data, for example, is broken down into only seven regions and combines what the consultants considered to be distinct sub-regional markets, such as Stirling with Dundee. While TGI data does not include a number of priority artforms, it was more important, for the purposes of this analysis, to obtain a relative picture of the populations and potential markets around which collaborative initiatives might form.

In some cases, the nodes fell within the area of other node catchments, and significantly overlapping catchments were identified. For example, the 45 minute node catchment for Dundee has 199,988 households, of which 141,520 are also within the 45 minute node catchment for Perth. Consequently, in the case of ‘East Scotland’⁴, the data from three node catchments (Dundee, Perth and St Andrews) was combined to create a single picture of the shared market.

Table 4.1 Sub-regional markets

Sub-Regional Market	Nodes	Local Authorities	STB Regions
Shetland/Outer Hebrides/Orkney	Shetlands and Orkneys, Outer Hebrides Rum and Eigg	Shetland Islands, EileanSiar, Orkney Islands	Shetland, Orkney and The Outer Hebrides
Caithness and Sutherland, Inverness and adjoining parts of Ross and Cromarty, Nairnshire, Speyside, etc Western Highlands / Skye and down to Oban	Caithness and Sutherland, Inverness, Fortwilliam Skye, Oban	Highland	Highlands and Skye
North East	Aberdeen	Aberdeen City, Aberdeenshire, Moray	Aberdeen and Grampian Highlands
City of Dundee and Angus ⁵	Dundee	Angus, Dundee	Perthshire, Angus, Dundee and the Kingdom of Fife
Perthshire	Perth	Perth and Kinross	
Fife	St Andrews	Fife	
Stirling and Trossachs, south to Falkirk	Stirling	Stirling, Clackmannanshire, Falkirk	West Highlands and Islands, Loch Lomond, Stirling and Trossachs
Argyll and Bute	Argyll, Campbeltown, Lochgilphead, Mull, Arran	Argyll and Bute	

¹ The node is the dot at the centre of an area of Scotland. The ‘node catchment’ is then defined as the area within a given drive-time (eg 45 or 90 minutes) from the centre point or node.

² Target Group Index, British Market Research Bureau Ltd.

³ *Taking Part* is a major survey commissioned by the Scottish Arts Council on attendance and participation in the arts and cultural activities and attitudes towards the arts amongst the population of Scotland.

⁴ ‘East Scotland’ is used in this report as shorthand for referring to the catchment area covering Dundee, Perth and Kinross, and North East Fife.

⁵ Although Angus was initially included as part of the Dundee sub-regional market it was later felt to have more in common with the North East grouping.

Edinburgh and the Lothians	Edinburgh	Edinburgh, West Lothian, Midlothian, East Lothian	Edinburgh and the Lothians
Greater Glasgow and Clyde Valley	Glasgow	Glasgow, North Lanarkshire, East Dunbartonshire, West Dunbartonshire, Inverclyde, Renfrewshire, East Renfrewshire	Greater Glasgow and Clyde Valley
Dumfries and Galloway / Ayrshire	Dumfries, Ayr	Dumfries and Galloway, North Ayrshire, South Ayrshire, East Ayrshire, South Lanarkshire	South of Scotland
Borders / South Lanarkshire / parts of Dumfries and Galloway	Borders, Dumfries	Scottish Borders	

4.7 Analysis of provision

Data on arts provision and existing audiences was obtained from the following sources:

- Scottish Arts Council annual return data
- Information supplied directly
- Estimates where data could not be obtained

This data included information on venue capacity and annual attendances.

4.8 Evidence base

The market analysis data was then combined with the data on provision (see table 7.1) to provide a range of information on each sub-regional market, including population; potential annual attendances and current annual attendances (and, therefore, the extent to which the market is currently penetrated, by comparing the total number of current attendances with the number of potential attendances); available capacity and population available per seat per night (which can be used as an indicator of how hard an arts marketer has to work to fill a seat on night when all the regularly programmed venues are promoting an event).

4.9 Investment criteria and conclusions

The brief had required us to prioritise on the basis of:

- Equitable geographical spread
- Sufficient arts organisations
- Sufficient arts provision
- Sufficient audiences

In order to assess these, the following evidence was established to be used as the basis for assessment:

- Equitable geographical spread: population⁶
- Sufficient arts organisations: the number of organisations with the ability to engage (ie excluding 'Publicity' organisations – see section 4.4)
- Sufficient arts provision: total annual capacity
- Sufficient audiences: current attenders

The minimum criteria to be met were agreed by the steering group as follows:

- Population: 10% of the Scottish adult population (415,000)
- Three arts organisations (excluding 'Publicity' organisations)
- Annual capacity of at least 40,000
- Current attenders equivalent to at least 1% of the adult population (40,000)

It may be worth noting that the same number was applied for annual capacity and current attenders. Where all the criteria are applied, a current attenders figure in excess of 40,000 would clearly imply a capacity also in excess of 40,000. However, the distinction was retained in the event that prioritisation for investment required only some of the criteria to be met.

4.10 Further consultation

A further consultation phase was undertaken to share the conclusions and to inform recommendations, with discussion forums held in Dundee and Aberdeen in March 2007. Attenders at these sessions are listed at Appendix 2.

4.11 Recommendations

Recommendations for implementation are outlined, including possible outline models and an action plan for the Scottish Arts Council.

⁶ In many instances, such as when considering provision, a more purely geographical approach might be sought, but in the context of developing audiences, 'equity' makes more sense in the context of the number of people.

5. Consultation results: arts organisations

The primary aim of the consultation was to undertake a needs analysis and build a picture of arts organisations beyond the Central Belt, as part of the evidence base, by identifying:

- What is current marketing practice like?
- Is there evidence of audience development?
- What help do people think they need?
- What help do the consultants think they need (and could this reasonably be met through collaborative or shared initiatives)?

5.1 Overview

Almost every interviewee observed that their marketing and audience development activity was limited by a lack of resources - people, money and/or time. This included interviewees from comparatively well-resourced organisations.

The consultants found that any segmentation of the organisations, to be used to inform investment priorities, was not obviously based on Scotland-wide shared 'needs' or services, but rather on an organisation's ability to engage in developing audiences within a sub-regional market. This was assessed on the basis of current marketing and audience development practice.

5.2 Segmentation

Across the sub-regional markets, the consultants identified that, in terms of current practice, organisations broadly fell into one of three segments, which are described in sections 5.3 to 5.5. The key factors affecting current practice are outlined below.

- Levels of resource: especially staff, but also budgets.
- Scale: smaller organisations were most likely to report a lack of resources for marketing and audience development (budgets and people).
- Audience development and marketing competence and knowledge: this was a relevant factor in terms of organisation-wide understanding of marketing and audience development, as well as in relation to individual skills and experience. Some interviewees struggled to define what audience development meant for their organisation, or presented a very limited definition, eg:

'We've increased sales from x to y [ticket sales numbers provided] so we've done reasonably well in our audience development, we feel.'

- The nature and needs of the specific marketplace: size of market and levels of provision, as well as historic practice, affect organisational approaches to marketing and audience development.
- Local authority funding policies and objectives: this is linked to levels of resource, but is also relevant in terms of setting or influencing strategic priorities for some organisations.
- Organisations' perceptions of 'competition' or 'collaboration': in some cases collaboration is already accepted practice (even if only at a low level) while other organisations believe it is more important to preserve and protect ownership of 'their' attendees, which overrides any strategic approach to audience development.

- The health of the arts economy, locally and regionally: in some areas, low levels of provision set the context, rendering audience development almost irrelevant without development of provision.

5.3 Segment 1: 'Publicity' organisations

These are organisations which, as reported to the consultants, have insufficient resources (people, money and/or time) to be fully functional:

'We don't have a marketing budget – we just spend money when we need to.'

'There's never been a specified budget for marketing'

In general, these organisations are more likely to be small-scale and they are less likely to be funded by the Scottish Arts Council.

Audience development practice for these organisations is achieved solely through programming, and these organisations are entirely provision-led: their focus is on making the right artistic content/artist selection, with secondary decisions about where and when to present.

The current ecology of presentation for these organisations does not include marketing: marketing is not a developed function of the organisation and there is little or no marketing infrastructure. These organisations simply undertake basic publicity, once programming is in place, to 'drum up' an audience by announcing what's on, on an event-by-event basis.

In some cases audience development is considered irrelevant because there is a lack of capacity:

'I'm sick of having loads of people keen to come and see things but no adequate facilities.'

Initiatives that have worked with these organisations are at a very tactical and hands-on level: for example, the Promoters Arts Network Audience Development Project's purchase, distribution and use of 10 A-Boards. Cited needs are also at a tactical or 'publicity' level:

'What we need is a PR specialist – that's essential.' (Small-scale organisation)

In summary, these organisations have neither the physical ability nor the commitment to engage in strategic, long-term audience development.

5.4 Segment 2: 'Tactical marketing' organisations

These organisations understand what marketing and audience development involve and have some infrastructure (eg a box office system or database and some budget and/or time). However, they lack the resources (budget and/or time), competent staff and/or the genuine policy commitment to move much beyond tactical publicity and direct mail, excepting occasional one-off projects. In most cases, they lack clear objectives beyond sales targets, and tend to work on an event-by-event or season-by-season basis, rather than adopting a long-term, audience-led approach:

'We have no marketing team as such, so it's down to me – in collaboration with the companies... We have done some work with the family audience... [but] a lot of what we do is publicity as opposed to marketing. We know what we need to do - it's just having the time'

'There's lots of work out there to do that you don't have time to do on a regular basis – we don't have time to work with new audiences... and we

don't have the resources to do the audience development that I would like to.... It's not about needing ideas but the time, energy and resources to put them into practice in the long-term.'

'Nobody's taking the longer-term view at the moment, because there's no time, and that's what's needed. Everyone believes in it [audience development] but it gets sidelined. I hope it will come to the fore...'

'The thing I'd most like help with is analysis – we've got Databox but no time to analyse it to its full potential'

'Tactical marketing' organisations have a basic knowledge of their audience, but insufficient information to be able to prioritise or address target groups or projects, and need practical help, support and advice in order to 'gear up' before they can engage in audience development. These organisations may profess a commitment to marketing and/or audience development but could be described as either not being in a position to implement it or it not being given priority in the internal competition for resources within the organisation.

5.5 Segment 3: 'Strategic' organisations

These are organisations that understand what marketing and audience development involve and have a clear policy commitment to audiences. Although they range in scale, type and artform, they are more likely to be well-established, regularly funded organisations, not least because these tend to attract the most experienced staff.

This segment engages in some audience-led activity, putting on events and projects which are marketed to particular target groups, and differentiate their marketing activity. They have marketing strategies for the long-term rather than simply planning from one event or season to the next.

In some cases, however, activity is still limited by resources, despite the policy commitment, and many organisations focus on particular groups or projects rather than having a holistic marketing strategy in place. A number of these organisations have also fallen foul of having introduced audience development projects for which funding has been obtained (not necessarily from the Scottish Arts Council) that cannot be sustained once the funding comes to an end. In other words, 'strategic' is primarily about attitude, knowledge, understanding and commitment rather than, necessarily, extensive 'physical' capacity or capability.

6. Consultation results: audience development network

6.1 Agencies

The two Scottish agencies have remits which focus on Edinburgh (The Audience Business) and Glasgow (Glasgow Grows Audiences).

In 2006, a piece of work was commissioned by Network – the association of arts marketing agencies dedicated to collaborative audience development and arts marketing - to update and widen Arts Council England's 2003 Stocktake of Audience Development Agencies, undertaken by Daniel Hadley.

The 2006 stock-take⁷ used Daniel Hadley's original definition of financial stability as when reliable income (defined as funding, membership fees and well-established direct services) is high enough to cover overheads. The exact figures for Glasgow Grows Audiences and The Audience Business are not quoted here, as these have since changed, but both agencies are still experiencing a 'viability gap' – in other words, their reliable income is insufficient to cover their overheads. This means that their focus is diverted away from their core purpose to generating income to make ends meet.

Both agencies maintain a strong belief that successful audience development requires 'local' knowledge and are committed to serving their local geographical area rather than significantly expanding their geographical remit, although both were open to the idea of expanding their remits slightly further afield. At the time of consultation, both organisations were also in the process of reviewing their missions and developing new 'products' and projects.

6.2 Dumfries and Galloway

A post of Audience Development Officer is supported by Dumfries and Galloway Arts Association and Dumfries and Galloway Council. It was originally funded as part of a Scotland-wide programme of lottery funded audience development posts in 2003/04, but has now been mainstreamed within Dumfries and Galloway Arts Association. A pilot of The Booth⁸ was underway at the time of this study, and the post is now being mentored at the instigation of, and funded by, the Scottish Arts Council to develop a regional audience strategy.

6.3 GASD (Gaelic Arts Strategic Development Forum)

A three year post of Audience Development Manager was established further to funding awarded to the GASD forum from the Scottish Arts Council and Bòrd Gàidhlig na h-Alba in 2005. The project is administratively hosted by Pròiseact Nan Ealan. The post is intended to deliver the audience development strategy originally produced by an independent consultant, who continues to work with the post-holder as a mentor and coach. At the time of consultation, the initiative was still at too early a stage to assess its overall success in terms of delivering its objectives. However, two key factors were identified to inform future initiatives:

⁷ Henderson, Pam & Maitland, Heather; *Audience Development Agency Stocktake Update*; (Network, 2006); p.16

⁸ Online ticketing service, originally developed by HI-Arts for organisations based in or touring to rural areas.

- In such an isolated location, the post-holder felt significant benefit from their mentoring relationship and the wider support from the audience development network, notably Glasgow Grows Audiences and Marcus Wilson at HI~Arts;
- The challenges of working with 'Publicity' organisations in order to deliver strategic audience development should not be under-estimated.

6.4 HI~Arts

The three year Highlands and Islands audience development project was originally established in 2002. The project was then extended to 2006. The project's key aims were to:

- Develop the marketing skills and practices of Highlands & Islands arts organisations and practitioners
- Identify and address barriers to access and participation in the arts by audiences across the Highlands and Islands
- Initiate appropriate collaborative audience and sales development projects within and across artforms and regions
- Coordinate and develop access to direct marketing databases and market research on arts audiences
- Raise the profile of the arts of the Highlands and Islands at national and international level

During the course of this study, in 2006, the post of Development Manager (Audiences & Communications) was mainstreamed into the core activity of HI~Arts. The post has a rotating brief, working intensively on specific projects (including consultancy) and delivering valuable infrastructure development including The Booth. From the feedback in consultation interviews, there is no doubt that this move will be welcomed, with the hands-on work undertaken by the post-holder particularly appreciated: the post has focused on a significant number of tactical interventions, responding effectively to the needs of organisations, such as the *Guide to Arts Marketing around Inverness* for touring companies, tip sheets, development of the media database and the online venue finder.

Although the post does not benefit from Network membership, there is a link with The Audience Business (through supply of office space).

6.5 Perth and Pitlochry

As part of the same Scotland-wide programme of lottery funded audience development posts in 2003/04 that led to the establishment of the audience development post in Dumfries and Galloway, a joint audience development post between Horsecross (managing the Perth Concert Hall and Perth Theatre) and Pitlochry Festival Theatre was funded by the Scottish Arts Council. However, the lack of a suitable candidate resulted in the appointment of a freelance consultant to research specific opportunities for collaboration, to be implemented by the marketing departments of both organisations.

The recommendations for collaboration included: audience and market research, programme information sharing, training and tourism/groups development. However, both organisations continue to be challenged by resources in implementing the joint strategic work. There is also a view that regional strategic working would be enhanced by a 'neutral' third party/model and additional capacity.

6.6 St Andrews

A joint two-year audience development project was initiated by the Scottish Arts Council in 2005 between the Byre Theatre and Fife Contemporary Arts and Craft. As in the case of the GASD post, a project plan was devised by an independent consultant. However, in this instance, the post was not proving successful at the time of this study. The original post-holder had resigned and the post was vacant. Although some low-level crossover projects had taken place, the perception was that the organisations had been

'yoked together'

Rather than actively seeking collaboration and that, as a different consultee put it:

'none of the initiatives brought big returns'

There appeared to have been a conflict of focus which had hampered the necessary cooperation.

The key lessons to be learned from this initiative for other investments seem to be that organisations need to desire collaboration and have genuinely shared objectives, as well as a certain level of resource to be able to engage in collaborative audience development - otherwise, focus is diverted away from the collaboration towards the need to cover the 'basics'. The situation was made more difficult for the post-holder because the post was isolated, with no mentoring relationship, peer or agency support.

7. Quantitative research results

7.1 Market overview

Although all subsequent data after section 7.1 uses figures from 2001 (as Area Profile Reports are drawn from 2001 Census data), it is worth noting that, based on the Office of National Statistics mid-year population estimate, in 2005 the Scottish population had risen to 5,094,800, with 4,229,709 adults aged 15+. These estimates identify the largest percentage change as a 24.6% increase in Aberdeenshire.

7.2 The Central Belt

In 2001, the Scottish population totalled 5,062,011, of which 4,155,129 were aged 15+. The marketplace analysis identified that 59% of the population aged 15+ (2,470,512) live within 45 minutes of Edinburgh or Glasgow or both. In practice, the available market for the two cities is larger: marketplace analysis of Glasgow and Edinburgh on separate projects⁹ has demonstrated an extended catchment area of over two hours drive time. Arts Council England research has previously identified that 56% of attenders are willing to travel up to one hour.

7.3 Evidence base

The evidence base combined the market analysis with data on provision at the level of sub-regional markets. Table 7.1 presents a summary of the sub-regional marketplaces, mapped against available data on capacity, attendances and provision. This evidence base was then used as the basis for prioritising investment. As explained in section 4.6, it is important to recognise that this data represents only a partial picture of the market and provision: the evidence base strikes a balance between a comprehensive approach and using a sledgehammer to crack a nut in order to consider the shared markets around which collaborative initiatives might form. A commentary on the table follows at section 7.4.

⁹ Tomlinson, Roger & Stockton, Stephan; *Developing audiences for the arts in Edinburgh: audience catchment area analysis for Edinburgh*; (1997)

Tomlinson, Roger; *Towards an arts development strategy for Glasgow City Council: audience catchment area analysis for Glasgow*; (1998)

Table 7.1 Evidence base

1. Node	2. Node catchment area (drivetime minutes)	3. Total adults	4. Total 'Any perf. in a theatre'	5. Performing arts orgs included	6. Maximum capacity on a given night	7. Annual combined capacity	8. Annual total attendance	9. Adult popn. per seat (per night)	10. Estimated attenders	11. Estimated attenders as % of 'Any perf. In a theatre'	12. Crossover with other node catchments
Aberdeen	<45	262,500	110,182	4	3,275	916,750	508,569	80	203,428	185%	Dundee, Inverness, Perth, St And.
	>45 & <90	165,188	62,259	0	0	0					
Argyll	<90	162,828	59,794	0	0	0					
Arran	<90	6,243	2,803	0	0	0					
Ayr	<45	513,049	192,161	2	1,081	139,411	77,824	475	31,130	16%	Glasgow, Stirling
Borders	<45	138,547	50,232	1	200	40,000	24,000	693	9,600	19%	Edinburgh, Stirling
Caithness and Sutherland	<90	25,334	9,116	1	76	3,116	2,152	286	861	9%	Inverness
Campbelltown	<90	13,648	5,383	0	0	0					
Dumfries	<45	94,361	35,559	0	0	0					
Dundee	<45	366,494	141,867	5	3,046	739,464	411,092	120	164,437	116%	Perth, St And.
Fort William	<90	37,524	15,457	0	0	0					Argyll, Inverness, Lochgilphead, Oban
Inverness	<45	93,015	38,672	2	814	555,148	83,083	114	33,233	86%	Aberdeen, Caithness/Sutherland, Fort William, Oban
	>45 & <90	78,128	31,521	0	0	0					
Lochgilphead	<90	52,326	22,273	0	0	0					
Mull		2,112	962	2	43	6,536	14,870	49	5,948	618%	
Oban	<45	35,492	14,039	0	0	0					
Perth	<45	485,054	188,635	8	4,726	1,521,632	641,730	103	256,692	136%	Dundee, Edinburgh, Glasgow, St Andrews, Stirling
Outer Hebrides, Rum, Eigg		22,728	8,943	2	0	0	5,261		2,104	24%	
Shetlands and Orkneys		33,157	13,722	2	0	0	38,822		15,529	113%	
Skye	<90	10,966	4,897	2	0	0	12,242		4,897	100%	
St Andrews	<45	297,114	109,897	4	1,841	452,069	184,354	161	73,742	67%	Dundee, Perth
Stirling	<45	1,626,099	600,281	6	12,865	1,097,835	278,114	568	111,246	19%	Ayr, Borders, Dundee, Edinburgh, Glasgow, Perth

7.4 Evidence base commentary

Column 1 lists the sub-regional nodes that were analysed in alphabetical order.

Column 2 defines the node catchment area that was analysed by giving the drive-time from the centre of the node. Standard norms of 45 and 90 minute drive-times have been employed, although these do constitute assumptions about likely catchment areas. It should be noted that for nodes where both the 45 and 90 minute node catchments are given, the numbers are shown on the basis of 0 to 45 minutes and 46 to 90 minutes (so the two rows of data would need to be combined to give the totals for the whole 90 minute node catchment).

Column 3 is derived from Area Profile Data and gives the total number of adults aged 15+.

Column 4 is derived from Target Group Index (TGI) data and the socio-economic profile of the population, indicating the projected number of adults within the population shown at column 3 with a propensity to attend “any performance in a theatre”.

Column 5 shows the number of arts organisations within the geographical area specified in column 2 and whose information is included in the total number of attendances. Only performing arts organisations are included because, in order to arrive at an assessment of market penetration, the consultants wished to compare the annual attendances (ie the current market) with the potential market shown in column 4, and data in column 4 does not include the non-performing arts. To clarify, this does not mean that only performing arts organisations would benefit from any potential solution: this is merely the measure selected to arrive at a comparison of the audience development conditions facing organisations within the node catchment area. It is also important to note that the data on capacity should be considered separately from data on attendances as some organisations do not have a formal or regular venue and therefore have not supplied capacity information.

Column 6 shows the maximum number of seats to be filled within the node catchment across the regularly programmed venues on a given night when they are all open.

Column 7 shows the annual combined capacity to be filled in the node catchment, which is calculated by multiplying the capacity of each venue by the number of performances they present annually (see section 4.7 for sources).

Column 8 shows the combined annual attendances at the arts organisations shown in column 5. It is worth pointing out that the data included here was obtained from a range of sources, as described in section 4.6, but the consultants have had to assume that the source data has been provided on a consistent basis and that, for example, it covers only sales and not complimentary tickets. It is also worth noting that the data supplied by organisations to the Scottish Arts Council breaks artforms down into drama, dance, music and other. Because ‘other’ could include a multitude of performance types applicable to ‘any performance in a theatre’ (pantomime, comedy, etc) this data has been included for the purposes of calculating total attenders, but this will give rise to some anomalies – for example the figures for Stirling appear to include cinema screenings at the macrobert.

Column 9 shows how hard organisations have to work at marketing, in terms of what proportion of the population has to be persuaded to attend to fill available regularly programmed seating capacity (assuming a given night when all the regularly programmed venues are open). For example, using a standard UK comparison, arts marketers have to persuade 1 person out of 3,020 local residents in Southampton to fill a seat; in Glasgow they have to persuade 1 person out of 211 and, as indicated in the table below, in Aberdeen, 1 person out of 80 residents. Making the comparison with towns with rural catchment areas of low population density in the UK, places such as Plymouth have to persuade 1 resident out of 300 to fill a seat, and in Norwich, 1 person out of 563. Locations in Scotland only achieve similar figures where there is little seating capacity and limited provision.

Again, there are a number of assumptions here – the consultants have had to assume a maximum seating capacity for each organisation, but the number also does not take account of organisations beyond the area specified in column 2, but whose catchments nevertheless overlap.¹⁰

Column 10 gives an estimated figure for the number of current attenders in the node catchment, which is calculated by dividing the total number of attendances given in column 7 by the TGI figure for average annual frequency of attendance at any performance in a theatre (2.5 attendances per annum).

Column 11 shows the estimated attenders figure given in column 10 as a percentage of the figure for attenders at any performance in a theatre. This effectively shows how well penetrated the marketplace is currently and the need for audience development to sustain organisations. In some cases big percentages (suggesting the market is heavily penetrated) are generated as a result of attendances from tourists or because organisations draw from a wider catchment.

Column 12 shows the crossover with other node catchment areas.

7.5 East Scotland

The following data was produced for the catchment East Scotland by combining and de-duplicating data from postcodes within a 45 minute drive-time of Dundee and/or St Andrews and/or Perth.

Table 7.2 East Scotland sub-regional market data

3. Total adults	4. Total 'Any perf in a theatre'	5. Performing arts orgs. included	6. Maximum capacity on a given night	7. Annual combined capacity	8. Annual total attendance	9. Adult popn. per seat per night	10. Estimated attenders	11. Estimated attenders as % of 'Any perf.'
620,706	239,916	11	5,501	1,744,357	734,267	113	293,707	122%

7.6 North East

There are subsequent references in this report to the 'North East' area. This area is based on the data given for the 90 minutes drive-time from Aberdeen shown in table 7.1.

¹⁰ Although this context cannot be included in the numbers, as you would then come back to producing numbers at a regional level, it has nevertheless been taken into account subsequently when prioritising investment.

8. Investment criteria

The brief for the study required the consultants to determine the most effective allocation of resources based on:

- Equitable geographical spread;
- Sufficient arts organisations;
- Sufficient arts provision;
- Sufficient audiences.

The table below summarises the criteria used to assess the delivery of realistic public benefit.

Table 8.1 Investment criteria

Criteria outlined in original brief	Basis for assessment	Minimum criteria to be met
1. Equitable geographical spread	Population – prioritising investment where the most people will benefit	10% of the adult population (415,000)
2. Sufficient arts organisations	Number of organisations able to engage	Three Scottish Arts Council funded organisations in the 'Tactical marketing' or 'Strategic' category
3. Sufficient arts provision	Total annual capacity	Annual capacity of at least 40,000
4. Sufficient audiences	Current attenders	Current attenders equivalent to at least 1% of the adult population (40,000)

8.1 Investment criteria commentary

Criteria 1 was assessed on the basis of population. When considering provision, a more geographical approach might be sought, but in the context of developing audiences, it was agreed by the project steering group that 'equity' makes more sense in the context of the number of people resident. Given the current audience development network, 10% of the adult population was selected as the basis for prioritisation. Subsequent prioritisation might select a smaller percentage. This data was obtained from column 3 of the evidence base (table 7.1).

Criteria 2 was assessed on the number of organisations with the ability to engage. This was not to say that 'Publicity' organisations would be excluded from any potential solution, but to recognise that strategic audience development solutions need to be built around organisations with the ability to engage at this level, rather than being dominated by immediate tactical concerns. The number of organisations deemed to be an appropriate number for prioritisation in order to benefit the most organisations was three. This is in terms of both capacity building, and helping to lead initiatives that start to form a strategic approach to the audience, rather than addressing only the day-to-day concerns of one or two organisations.

Criteria 3 (arts provision) was assessed on the basis of total annual capacity.

Criteria 4 was effectively trying to identify that there was an audience of sufficient size to justify investment. This information was obtained from column 10 of the evidence base.

8.2 Additional criteria

The consultants also identified a number of criteria that would affect the success of any implementation. The ability of any proposed solution to meet these criteria should affect any investment decision and potentially determine any further prioritisation:

- A shared, collective vision; common purpose and clear statement of 'SMART' (specific, measurable, agreed, realistic, time-scaled) objectives for developing a shared audience, artform or a shared use of common services;
- An achievable operational programme and at least some of the proposed activity is in accordance with strategic, long-term audience development (not just 'quick wins');
- The initiative focuses on activity that collaboration alone can deliver, or that collaboration can do better than organisations individually - not duplicating the work of organisations, but doing more and different things;
- The capacity of partners to collaborate: investment in collaboration focuses on organisations with the ability to engage, while any proposed involvement of 'Publicity' organisations is at a level that is realistic for the participant and the delivery model;
- Ownership and motivation: there must be a genuine willingness and commitment to work together (this could be evidenced by investment of time and ideas eg via steering group participation and/or up-front commitment of financial resources);
- A mentoring and/or support structure for the new initiative;
- Viability: any proposal is realistic about the resources required (time as well as money) to achieve its goals and gives consideration to how appropriate recruitment is achieved;
- Leadership: successful audience development organisations have one other criterion in common - strong, intelligent, inspired leaders; leadership does not necessarily have to come from a director post (it could, for example, come from a part-time executive chair) but is an essential component of success.

9. Conclusions

9.1 Allocation of resources

In the overall Scottish context, the most effective allocation of resources means that the first priority must be investment in Glasgow Grows Audiences (GGA) and The Audience Business (TAB), because investment here delivers the most cost-effective return in terms of increased attendances and participation. There are two issues to be addressed:

- Expanding the remit of the agencies to cover the audience catchment area
- Securing the future of the agencies financially

As the only two sub-regional markets that met all of the investment criteria (table 8.1), the North East and East Scotland were judged to be the second priorities for investment. From the consultation, these areas were also deemed to have the potential for realising the additional criteria outlined in section 8.2.

Of course, these conclusions have been reached based on the criteria established in the original brief. So, this is not to say that other areas might not be prioritised on different criteria in the future, for political or infrastructure reasons: for example, it may be logical to extend the Dumfries and Galloway post to cover the Borders. However, the consultants believe the criteria do form a logical basis for informing the immediate focus for expansion of the audience development network.

10. Further consultation and outline models

Given the conclusions reached, regarding investment in the North East and East Scotland, further consultation forums were undertaken in Aberdeen and Dundee.

In both cases, successful delivery could take a variety of forms and ultimately the most appropriate model will depend on what the partners want to achieve.

The outline models described below therefore represent a series of 'structural' options that could work in the North East and East Scotland to deliver collaborative audience development. However, every audience development initiative is unique and the most successful models that have been implemented are those which are owned by the constituency rather than imposed. Consequently, these options are presented as prototypes to stimulate local debate about a model that would be appropriate for meeting their objectives.

10.1 North East context

The North East is deemed to include Aberdeen City, Aberdeenshire, Moray and, probably, Angus. There is a history of some collaboration (for example, in organisations coming together in order to establish GREAT distribution) and political will is also indicated by the stated aim to create an *'Audience Development project for the North East'*¹¹.

Any model will need to recognise that Aberdeen Performing Arts constitutes a dominant organisation in terms of provision and that many of the other organisations in the region are caught in a resources 'Catch 22': their lack of resources contributes to the need for intervention and collaboration but, at the same time, limits their ability to engage at a strategic level. This will have particular implications for the Scottish Arts council in terms of the need to provide support to enable the development of a collaborative initiative. Perhaps the key to any model is that it should be local. As one consultee from outside the region observed of the North East:

'You need someone on the ground who understands the market... and there's a big job to be done'

10.2 East Scotland context

The East Scotland sub-regional market includes Perth and Kinross, Dundee and North East Fife. It could also include Angus, but it is felt that the character of Angus may have more in common, in terms of shared objectives, with Aberdeenshire and Moray. Clearly the East Scotland market cuts across political boundaries. While the consultants recognise that this presents a challenge for Fife, in terms of a split in service provision, the consultants believe that venues in St Andrews would ultimately derive more benefit from an East Scotland solution, while Dunfermline, for example, would benefit more from a relationship with The Audience Business. Indeed consultees in St Andrews stated that they considered themselves to have more in common with Dundee than Dunfermline. So, while this may be politically inconvenient, a divide in Fife delivers the most appropriate solution. The East Scotland solution rather than, say, a solution for Dundee, also creates a more strategic approach to the audience and a cluster of organisations that contributes to rendering a solution financially viable.

¹¹ Aberdeen City Council, *Cultural Strategy for Aberdeen 2004/2008*, (2004), p3

10.3 Model 1: 'Unique' solution

The 'unique' solution was considered by the consultants to be an option for implementation in the North East but not in East Scotland. Like the Dumfries and Galloway solution, this model would use an officer(s) attached to a lead arts organisation, with a budget for audience development implementation. This model is appropriate where there is a dominant organisation in terms of provision and audiences (in this case, Aberdeen Performing Arts) so this is not viewed as a realistic model for East Scotland. The officer(s) would be responsible for:

- Developing understanding of the local market;
- Developing audience development initiatives.

While benefiting in terms of overheads/administrative support from being attached to a lead organisation, the downside of this proposal may be that the post(s) are perceived to be 'owned' and/or unduly influenced by the lead organisation. However, where attempts have been made to 'split' posts this has had a negative impact on effectiveness (not least logistically for the post-holder). The success of such a model will therefore depend on the relationship between the lead organisation and the rest of the sector locally.

Based on other initiatives, the annual cost per officer would be in the region of £50,000. This would include a salary of £30,000 minimum (depending on number/seniority of posts) and a small budget for implementation.

10.4 Model 2: Broker

This solution was considered by the consultants to be an option for implementation in East Scotland. Similar to the unique solution, but independent rather than hosted by an arts organisation (which feedback indicated would not be an acceptable way forward for the constituency).

This option reflects previous proposals such as Baker's marketing animateur¹², who would 'be appointed, in partnership with local agencies, to support and encourage collaborative marketing'.¹³

The aim of the broker (or brokers) would be to work hands-on, making interventions on the ground, including:

- Developing understanding of the local market;
- Identifying, encouraging and facilitating collaborations/initiatives, including through budget deployment, based on knowledge of the market from the research;
- Coordinating networking, training and dissemination of best practice;
- Developing local skills and offering advice and informal consultancy;
- Liaising with promoters and providing advice to incoming touring companies.

The downsides of the 'independent' post model are how oversight and responsibility for employment are dealt with (probably needing the involvement of one of the Central Belt audience development agencies), as well as the difficulty of recruiting a suitably experienced practitioner.

¹² Baker, Tim; *Supporting Marketing and Audience Development*; (Scottish Arts Council, 1998); p.25

¹³ A similar solution has recently been implemented in Cumbria and Lancashire.

The cost of a broker would be about £50,000 per post, although with a salary FTE of £30,000 minimum and overheads to be covered, this would give the broker only a very small budget to work with.

10.5 Model 3: 'Semi-Detached' agency or consortium

This model could be applied in either East Scotland or the North East and would use an existing Central Belt audience development agency as the host organisation. An arms-length local office would be established (eg in Aberdeen), with audience development staff in location 'on the ground' but with 'overhead' services (including a Director and administration) provided centrally. In many ways this would function like the GREAT model, where the distribution service is organised locally in the North East, but the Edinburgh office of EAE distribution supplies administrative functions such as invoicing.

It is envisaged that the 'semi-detached' organisation would have a local board, determining its direction, as well as separate branding.

While this model may be more cost-effective than putting a full agency structure in place (and the focus can be on delivery rather than administration), many of the best agencies in the UK depend on a high quality Director, so careful consideration would need to be given to whether such an initiative would be as effective.

It is difficult to estimate the costs of this model as it would depend on the scale and the level of infrastructure considered necessary to be put in place, but it forms a 'middle option' in the sense of being achievable for between the costs of the unique solution and the agency solution.

10.6 Model 4: Agency or limited company consortium¹⁴

This model could be applied in either the North East or East Scotland. This is an independently constituted organisation, such as those established in Edinburgh and Glasgow, providing a range of services to members, such as research, audience development projects, networking and training.

However, there are not enough organisations in either sub-regional market to make a subscription model possible, so it is likely that establishing this model will depend on there being sufficient organisations to form a fee-paying membership. Most agencies also have a number of funding partners, (their contribution can mean that the agency delivers some services free of charge as part of a service level agreement).

Based on other initiatives, the annual costs of an agency with 3.5 full-time equivalent members of staff would be in the region of £150,000.

10.7 North East feedback

Participants at the consultation session in Aberdeen were eager to develop their own unique model, appropriate to local needs. It was initially felt that a one person model could be swamped, but that capacity and long-term sustainability were also an issue.

¹⁴ There are currently 14 audience development agencies in the UK: AMH (Hampshire), Arts About Manchester, Audiences Central, Audiences London, Audiences Northern Ireland, Audiences North East, Audiences Wales, Audiences Yorkshire, Glasgow Grows Audiences, Smart Audiences (Surrey), South West Arts Marketing, Sussex Arts Marketing, The Audience Business (Edinburgh) & TEAM (Liverpool).

It was felt that ideally the model would respond to the needs of both a small, rural gallery and a national company and have the ability to get in touch with local networks (although clearly this has implications for resources). Participants were also anxious that any resource should fit with existing local initiatives.

Recruitment was acknowledged to be a key challenge and that trying to recruit the appropriate calibre person could also have implications for the model – ensuring the recruitment proposition is attractive enough to appropriately skilled individuals.

10.7.1 East Scotland feedback

Participants at the consultation session in Dundee felt that any resource should be a unique model appropriate to local needs, that would draw on the 'best bits' of existing models but not replicate them. There was a feeling that the resource should be generic and include the visual arts (*'let's avoid the word 'audience'*) and that it should focus on 'doing' and delivery. The idea of a co-operative or a consortium owned by the members was raised but there was some concern about the time and resources required to develop this model. It was felt that someone was needed to be the focus, obtain 'buy in' and negotiate campaigns. The idea of an ArtsFest (like that run by Audiences Central in Birmingham) was also raised.

For local authorities, issues revolved around social inclusion, young people and local market penetration but the point was made that these concerns must be set in the context of the funding climate and reductions in resources.

Recruitment was acknowledged to be a key challenge.

11. Recommendations

11.1 Existing network

The existing audience development network should largely continue unchanged.

However, both Glasgow Grows Audiences (GGA) and The Audience Business (TAB) should expand their geographical remits to more accurately reflect the audience catchment:

- GGA to cover Ayrshire
- TAB to cover the Lothians, and South West Fife

It is not currently clear where Stirling and Falkirk 'fall'. Analysis of catchment data by the agencies may identify that it is more appropriate for this area to be covered by either GGA or TAB. If this does not provide clear guidance it may be that some form of joint membership would be applicable.

Both agencies need to achieve a more balanced financial equation, which should be improved through expansion of their remits, but this will also constitute an important area for the Scottish Arts Council to monitor in terms of ensuring the success of its investment.

In the longer-term, it could be appropriate for the Dumfries and Galloway initiative to be expanded to cover the Borders.

The St Andrews and Perth/Pitlochry initiatives will ultimately be superseded by the East Scotland initiative.

11.2 North East and East Scotland

At the outset of this study, it was perhaps envisaged that there would be a geographically-phased implementation plan.

However, the consultants recommend that the Scottish Arts Council should work with the North East and East Scotland in parallel to develop collaborative initiatives.

11.3 Action plan

Most of the tasks outlined in the timetabled action plan set out below refer to the process to be undertaken in both the North East and East Scotland.

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Month	Task
July 2007	<p>Accept report and recommendations.</p> <p>Hold meetings with TAB and GGA to discuss proposed expansion of geographical remits.</p> <p>Meet with Fife Council to discuss their response to the recommendations.</p> <p>Contact key players in North East and East Scotland to establish any progress since March consultation sessions and ask what help, if any, would be useful to support them in developing a local initiative.¹⁵</p>
September 2007	Put consultancy support in place for North East and East Scotland, if requested.
October 2007	<p>Consultant to facilitate steering group discussions to agree shared aims and objectives, possible activity and an appropriate model.</p> <p>Consultant to work up model and present for wider consultation among potential participants.</p>
November 2007	<p>Consultant to work up business plan or formal document including details of structure, potential funding partners and members, job descriptions and person specs for any posts/Board, detailed budget, plus proposed activities and services to be delivered.</p> <p>Consultant to hold discussions with funders based on the 'business plan'.</p> <p>Consultant to confirm to potential members the operating parameters proposed, including circulation of the 'business plan'.</p>
December 2007	Nominated lead organisation makes lottery application, supported by consultant
January 2008	<p>Consultant to prepare constitution and incorporate company (if applicable).</p> <p>Consultant to prepare Board recruitment pack and actively seek nominations for Board membership and for chairperson (if applicable).</p> <p>Agree appointment of chairperson with steering group (if applicable).</p> <p>Consultant to prepare staff recruitment pack and advertise for candidates.</p>
February 2008	Shortlist and interview candidates, with a panel including the Board Chair.
March 2008	Hold Board recruitment interviews and run Board induction session (if applicable).
April 2008	Initiatives begin.

¹⁵ It is envisaged that the local organisations might form a steering group but that they will require some practical help in undertaking the steps outlined above eg consultancy.

Appendix 1: Consultation interviewees

Aberdeen Art Gallery and Museums	Deirdre	Grant
Aberdeen City Council	Ciaran	Monaghan
Aberdeen City Council	Gail	Penman
Aberdeen Performing Arts	Duncan	Hendry
Aberdeenshire Council	Amanda	Hare
Aberdeenshire Council	Hazel	Weeks
Adam Smith Theatre	Sheila	Thomson
Angus Council	Patricia	McGowan
Argyll and Bute Council	Eileen	Rae
The Audience Business	Ros	Lamont
Birnam Institute	Gemma	Cruickshank
Borderline Theatre Company	Eddie	Jackson
Byre Theatre/Fife Contemporary Art & Craft	Debbie	Butler
Byre Theatre of St Andrews	David	Orr
Carnegie Hall	Laura	Crielly
City of Edinburgh Council	Lynne	Halfpenny
City of Edinburgh Council	Rebecca	Peppiette
Cultural Enterprise Aberdeen	Jim	Ewen
Deveron Arts	Claudia	Zeiske
Dumfries and Galloway Arts Association	Jill	Henry
Dumfries and Galloway Arts Association	Jenny	Wilson
Dumfries and Galloway Council	Rebecca	Coggins
Dumfries and Galloway Council	Anne	Campbell
Dundee Contemporary Arts	Clive	Gilman
Dundee Contemporary Arts	Jan	McTaggart
Dundee Repertory Theatre	Lorna	Duguid
East Ayrshire Council	Adam	Geary
Eastgate Theatre	Caroline	Gillespie
Eastgate Theatre	Mary	Shields
Eastgate Theatre	Joanna	Thompson
Eden Court Theatre	Colin	Marr
Enterprise Music Scotland Limited	Bob	Tait
Falkirk Council	Paul	Eames
Falkirk Town Hall	Julia	Harkness
Federation of Scottish Theatre	Lizzi	Nicoll
Feis Rois	Rita	Hunter
Fife Contemporary Arts and Craft	Diana	Sykes
Fife Council	Steven	Grimmond
Gaiety Theatre	Paul	Pomfret
GASD	Kirstie	Andersen
Glasgow City Council	Charles	Bell
Glasgow Grows Audiences	Julie	Tait
Hi~Arts	Robert	Livingston
Hi~Arts	Marcus	Wilson
Highland 2007	Alison	Bell
Highland Council	Judi	Menabney
Horsecross	Barbara	Chalmers

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Horsecross	Jane	Spiers
Inverness Music Festival	Colin	Lewis
Jazz Aberdeen	Irene	Cairney
Kirkcaldy Museum	Alison	Pearson
The Lemon Tree	Jamie	Marshall
Lochgelly Centre	Verdi	Barr
Lochgoilhead Fiddle Workshop	Mark	Morpurgo
Lochside Theatre	Allan	Scott
Lyth Arts Centre	William	Wilson
macrobert Arts Centre	Ben	Jeffries
McLaurin Galleries	Elizabeth	Kwasnick
Moniack Mhor	Andrea	Muir
Moray Council	Nick	Fearne
Mount Stuart	Mairi	McVey
National Theatre of Scotland	Adrian	Searle
North East Arts Touring	Sandy	Maxwell
Northlands Glass	Iain	Gunn
Orkney Council	Clare	Gee
Palace Theatre, Kilmarnock	Janice	Blane
Promoters Arts Network	Duncan	MacInnes
Peacock Visual Arts	Lindsay	Gordon
Pier Arts Centre	Neil	Firth
Pitlochry Festival Theatre	Derek	Allan
Pitlochry Festival Theatre	Nikki	Axford
Roths Halls	Claire	Richards
Scots Language Resource	Mike	Hance
Scottish Arts Council	Caroline	Docherty
Scottish Borders Council	Iain	McCauley
Scottish Dance Theatre	Kerryn	Hurley
Scottish Opera	Gareth	Beedie
Scottish Opera	Frances	Cairney
Scottish Sculpture Workshop	Hilary	Nicoll
Shetland Arts Development Agency	Gwilym	Gibbons
St Magnus Festival	Glenys	Hughes
StAnza: Scotland's Poetry Festival	Brian	Johnstone
Strathpeffer Pavilion	Catherine	MacNeil
Tolbooth	Eddie	White
Wynd Theatre	Felix	Sear

Appendix 2: Discussion forum attendees

Aberdeen Art Gallery and Museums	Deirdre	Grant
Aberdeen City Council	Ciaran	Monaghan
Aberdeen City Council	Fiona	Wedderburn
Aberdeen International Youth Festival	Jenny	Phillips
Aberdeen Performing Arts	Shona	Byrne
Aberdeen Performing Arts	Duncan	Hendry
Aberdeenshire Council	Lorraine	Grant
Aberdeenshire Council	Hazel	Weeks
Angus Council	Colin	Dakers
Citymoves	Ian	Spink
Dundee Contemporary Arts	Jan	McTaggart
Dundee Repertory Theatre	Nicola	Young
Fife Contemporary Art & Craft	Diana	Sykes
Fife Council	Frank	Chinn
Fife Council	Iain	Whitelaw
Horsecross	Barbara	Chalmers
Horsecross	Claire	Wilcock
Lemon Tree	Joni	Fincham
Moray Council	Nick	Fearne
NEAT	Martin	Milne
Perth & Kinross Council	Liz	Knowles
Pitlochry Festival Theatre	Derek	Allan
Puppet Animation Scotland	Simon	Hart
Puppet Animation Scotland	Ben	Torrie
Roths Halls	Claire	Richards
Scottish Dance Theatre	Kerryn	Hurley

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