



The Thirst for Knowledge – Audience Data in the Arts

A report for Arts Council England, the Scottish Arts Council and the Arts Council of Wales

Appendix – Project Descriptions

This appendix contains detailed outlines of each of the proposed sections of work described in the main report. The alternative options for addressing each issue are discussed in the main report – these descriptions cover just the recommended ways forward.

This appendix needs to be read alongside the main report and executive summary which are available to download from www.catalystarts.com or by emailing info@catalystarts.com

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A. Project description – Protocols and Guides to Good Practice

A.1 Summary

There are two strands to this project: to provide clear, unambiguous definitions of a range of commonly used (and misused) terms and concepts and to pull together protocols and guides to best practice for some key processes that involve audience data. The aim is to produce definitive statements which can then be adopted by the Arts Councils. Other organisations which collect data (such as local authorities) can then use these protocols in their work.

The overall aim is to increase the level of comparability between data sources and to make it easier for organisations to make use of data to support all kinds of tasks.

A.2 What the project will be

The three steps of the project are:

- To research and propose definitions of a range of terms and concepts
- To research and produce protocols to cover a range of processes
- To research and write up best practice examples of the definitions and protocols in practice (which may, or may not, come from real life examples)

The project will need a relatively small amount of research and consultation into both what concepts should be defined by these standard protocols, and what the contents of those definitions will be. Not everyone will agree with all points so the task will be to balance the needs of the constituency – both potential users of protocols and those organisations who would make use of the data – with the latest thinking from data experts outside the arts. The key issue is that the project doesn't get swamped by alternative viewpoints expressed during the consultation – the aim is to produce something, even if needs to be revised in the light of experience in the field after a period of time.

The overall aim in developing these standards is to produce something which is useful rather than simply interesting – every definition and protocol needs to be easily related to how it might be used in practice.

By way of illustration the range of concepts and processes that could be covered by this project might include:

- Definitions of catchment area, potential market size and drive time, with examples of how these can be calculated, and what practical use can be made of them
- Overview of the power of data, with examples of how organisations have made use of it at various levels
- How to incorporate testing into direct marketing
- How to make the best use of TGI and Area Profile Reports
- How to ensure consistent data entry when working with a ticketing system
- How to develop a data management policy covering data quality, deduplication, cleaning etc
- The issues around measuring diversity within an audience – a definitive standard may not be appropriate but something that sets out the potential pitfalls and shows how other organisations have tackled this subject would be useful
- Guidance on collecting data for non-ticketed organisations



A.3 Similar existing or planned projects

The Audit Commission has specified a range of Best Practice criteria for Local Authorities to comply with.

A.4 Who is the project going to help

- Organisations that collect and/or analyse data will be better able to rely on comparable results
- Bodies that fund research will be able to rely on a level of comparability between individual projects
- Arts organisations will be able to use the protocols and standards to enable them to set up their particular internal systems without having to research best practice from scratch. The current level of fear and apprehension about data concepts will also be reduced by having access to clear definitions and guidelines
- Those who train people within the arts sector will be able to make use of the standard protocols and guides to ensure that their teaching materials are relevant and useful across the whole of the UK

A.5 Partnership and buy-in

All three Arts Councils must be confident that the range of the topics covered is comprehensive and confirm that they will ensure as wide a compliance as possible, Local authorities

A.6 Who could do the project

A very experienced data practitioner with

- a thorough understanding of data analysis and usage
- An understanding of the current level of data use within the sector and the ability to explain complicated concepts clearly and simply
- A broad understanding of the capabilities and limitations of box office computer systems



B. Project brief – Standard System Reports

B.1 Summary

This project will identify, specify and commission a series of standard reports from all major ticketing system suppliers. Currently each ticketing system produces reports which look very different, use different terms and compile different figures. However the actual information is the same: detailed sales figures, booking patterns etc. If standard reports could be commissioned this would make it much easier for anyone making any kind of comparison across organisations. There is also a need to create standard data extraction procedures so that getting data out systems for projects such as catchment area analysis or artform crossover analysis would be easier across organisations without the need for specific system knowledge.

The aim in setting up this project is not to criticise what is currently available on individual systems, but rather to develop an additional 'standard' approach.

B.2 What the project will be

- A small amount of research to refine thoughts about what exactly should be commissioned. This should encompass a range of potential users –both those who have ticketing systems themselves (through industry groupings or system user groups) and those such as agencies and touring companies which don't have direct system access.
- It will then be necessary to distil the needs (it is envisaged that 3 to 4 reports should encompass the range of marketing and sales figures information required) and then discuss these with system suppliers. There may be a need to compromise on some issues, but the aim will be to satisfy as many of the needs of the users as possible, balanced with the technical considerations about what the systems can feasibly do.
- Previous attempts to encourage suppliers to work together by relying on their good nature have failed to produce any significant changes. They all appear willing to join an initiative and further discussions should aim to build a relationship
- In the second and subsequent year it is suggested that a review and refinement of the original reports be undertaken along with the consideration of 1 or 2 additional reports. Potentially there will also be some new major ticketing or marketing system suppliers by then which need to be included.

There is an issue about definition of a 'major' ticketing or marketing system. The consultant should consider which systems represent the majority of users and have the capability to provide the data.

B.3 What the project will NOT be

This is not an attempt to get the system suppliers to integrate their operations in any way – it is simply an additional set of reports. System suppliers will still be able to offer their own reports which will most likely include more functionality or detail than the standard versions.

B.4 Similar existing or planned projects

The Audiences.com conference proposed that standard system reports should be written although funding was not found to do this.

B.5 Who is the project going to help

- Touring marketing managers and promoters who visit a range of venues and need directly comparable figures
- Research projects looking at a range of venues. The standard extraction reports will be especially important to this group.
- Marketing Managers moving from one venue to another



- Agencies who will be able to receive directly comparable information
- Any grouping of organisations who need to look at comparable data, eg a working group of large-scale theatres or a city-wide consortium.

B.6 Partnership and buy-in

All major system suppliers have been approached and given their agreement in principle. They will have no market advantage to gain by producing the reports, but nothing to lose, especially if they are to be paid.

B.7 Who could do the project

A consultant with:

- A good level of knowledge of most (if not all) major ticketing systems
- A thorough understanding of the requirements of marketers
- An appreciation of the commercial standpoint of system suppliers





C. Project description – Specific Research Project – Door Sales

C.1 Summary

Many people have suggested that any analysis project based on box office transaction data is immediately flawed because of the effect of door sales – transactions where name and address detail is not captured on the box office database.

C.2 What the project will be

The objective of this project is to discover whether there are clear patterns to door sales across the arts which could then be taken into account when doing data analysis projects.

This project will therefore entail devising a research methodology to investigate all aspects of transactions for which customer details are not attached. This will need to include

- Finding out exactly what proportion of transactions fall into this category
- Profiling transactions to consider how different 'door sales' customers are from those who book in advance (if at all). This will involve face-to-face interviews at venues.
- Undertaking research across a wide variety of organisations that currently collect customer data against ticketing transactions
- Producing a report, written for the non-statistician, which will be published via Arts Oracle
- Producing, if possible, a standard weighting approach that can be applied to any future research projects
- Feeding in relevant comments to the wider Audience Information Initiative about both the development of the standard protocols and guidelines for data collection, and the training programme, in order to help organisations improve the level of data capture

C.3 Similar existing or planned projects

Nothing of this kind has been undertaken in the past on a large-scale basis. It is likely that some audience development agencies or arts organisations have views on this issue, and some may have applied approaches to their own research projects

C.4 Who is the project going to help

Anyone who undertakes research or analysis based on box office transaction data including arts organisations, agencies, consultants and academics.

C.5 Partnership and buy-in

This project will need to be undertaken in conjunction with arts organisations who have ticketing systems. The methodology will also need to be developed in consultation with the Research officers of the Arts Councils.

C.6 Risks

There is a risk that this project will not be able to produce any significant differences. If this is the case, then there will still be merit in having undertaken the exercise, and it is extremely unlikely that there will be no actionable outcomes at all.

C.7 Who could do the project

A researcher / analyst with experience of producing clear and understandable reports. Experience of the arts is not essential. This is a project which could ideally be done as a partnership between an arts consultant (who could ensure that the outputs were usable by a wide range of people within the arts) and a market research / data expert.

D. Project brief – Specific Research Project – Bookers versus attenders

D.1 Summary

Another factor that is frequently cited against the validity of box office data analysis is the possibility that people who attend with other people sometimes take it in turns to buy the tickets for that group. The Box Office data would therefore make it look as though someone had lapsed from attending, even though they had been coming frequently as part of someone else's party. This can apply equally to couples who might each book tickets, depending on the circumstances. This project would attempt to find out whether this effect is significant, to find whether a standard measure can be applied to data projects to correct for it and to make suggestions about how this factor can be overcome when data is collected.

Box Office computer systems could fairly easily store information about the other members of a party in addition to the booker, but this relies on capturing that information at the point of sale. This project needs therefore to recommend ways to improve this level of capture, working in conjunction with the system suppliers.

D.2 What the project will be

The objective of this project is to discover whether there are clear patterns to bookings made in different names across the arts which could then be taken into account when doing data analysis projects.

The work will therefore entail:

- Devising a research methodology to investigate all aspects of transactions involving more than one person.
- Undertaking research across a wide variety of organisations that currently collect customer data against ticketing transactions to find out to what extent people tend to vary the person who books tickets for a group
- Producing a report, written for the non-statistician, which will be published via Arts Oracle
- Producing, if possible, a standard weighting approach that can be applied to any future research projects
- Feeding in relevant comments about both the development of the standard protocols and guidelines for data collection, and the training programme, to help organisations improve the level of data capture. This may include ideas for ways in which organisations can link bookings for parties together so that they can be clearly identified when research is undertaken. This should be done in conjunction with the ticketing system suppliers

D.3 Similar existing or planned projects

Nothing of this kind has been undertaken in the past on a large-scale basis. It is likely that some audience development agencies or arts organisations have views on this issue, and some may have applied approaches to their own research projects

D.4 Who is the project going to help

Anyone who undertakes research or analysis based on box office transaction data including arts organisations, agencies, consultants and academics.

D.5 Partnership and buy-in

This project will need to be undertaken in conjunction with arts organisations with ticketing systems. The methodology will also need to be developed in consultation with the Research officers of the Arts Councils.



D.6 Risks

There is a risk that this project will not be able to produce any significant differences. If this is the case, then there will still be merit in having undertaken the exercise, and it is extremely unlikely that there will be no actionable outcomes at all.

D.7 Who could do the project

A researcher / analyst with experience of producing clear and understandable reports. Experience of the arts is not essential. This is a project which could ideally be done as a partnership between an arts consultant (who could ensure that the outputs were usable by a wide range of people within the arts) and a market research / data expert.



E. Project brief – Data Ownership Guidelines

E.1 Summary

The issue of data ‘ownership’ has got in the way of the good use of data on many occasions in the past. Venues have not shared data with touring companies or promoters or released it for analysis projects. This is in part because of a wide spread misunderstanding of how the data protection act applies to the arts.

In the open market there is an argument that organisations should be free to develop their own policies about data sharing, but in the subsidised sector (both Local Authority and Arts Councils) the benefits of sharing would seem to outweigh protectionist concerns of the individual.

There are also problems that can sharing data can entail – both operational and strategic – and these need to be taken into account in producing a workable policy.

If the research concludes that on balance there are benefits that can flow from greater data sharing then there will be a strong need for leadership on this issue, both to encourage organisations to change their policies (particularly the commercial sector who will be the most difficult to persuade) and also to apply a greater amount of pressure to those venues that are funded by the Arts Councils.

E.2 What the project will be

The tasks involved in this project are:

- To research the situation around data ownership in detail, seeking input from venues and companies in both the subsidised and commercial sectors. The aim will be to get a clear picture of what data ownership policies are currently being applied, what the thinking is behind these policies and what demands there are for the situation to change.
- To propose a policy position to be adopted by the four Arts Councils. This will need to take into account all the views expressed, should reflect the findings on what benefits there might be to venues, companies and the arts as a whole to wider data sharing and take into account situations where data sharing might not be wholly appropriate.
- To propose sample contract clauses that can be adopted by venues, companies and ticket agents
- To seek out examples of good practice to monitor and write up
- To set out the potential pitfalls and propose ways to address them
- To work with the Arts Councils, and with the Arts Oracle team, to plan the best ways to communicate this policy position with the arts constituency so as to encourage its widescale adoption. There may be various strands to this, such as articles on Arts Oracle, presentations to conferences and meetings (both existing forums such as TMA, FST, Creu Cymru and specific meetings of, for example, venues and companies where such groupings don’t already meet regularly), meetings with Arts Council officers, articles in the arts press, individual discussions with managers of key venues, and so on. The consultant will need to develop a strategy, and then assist the Arts Councils in putting it into action.

This whole project needs not just to work in one direction – organisations need to understand what they’re going to do before they receive the data, and the sharing agreement needs to cover factors such as exactly how many times people are going to be mailed. When a venue shares its data with another organisation, it places a lot of trust in that third party not to do anything outside the Data Protection legislation, let alone outside the venue’s overall direct marketing policy.





E.3 What the project will NOT be

This project will not be suggesting that any organisation operate outside the Data Protection Act, or against the express wishes of companies. It is not anticipated that this project will require any change of advice from the Information Commissioner.

E.4 Similar existing or planned projects

The consultant Roger Tomlinson has done much work on the implications of the Data Protection Act to the arts sector, but whilst this has clarified that data ownership is not something covered by the act, there has not yet been any work undertaken to develop a standard policy on data ownership.

E.5 Who is the project going to help

The primary beneficiaries of this project will be those organisations which rely on others to sell tickets for them – most frequently, venues where touring companies perform. However, many venues would also welcome clear guidelines on this subject in order to clarify what has previously been a ‘muddy’ situation.

E.6 Partnership and buy-in

This project is all about partnership and buy-in. The needs, and fears, of a wide range of organisations need to be taken into account and opposing views carefully balanced. Once the policy position is developed, there needs to be consultation within each of the Arts Councils to ensure buy-in. This project also needs to dovetail with others in the Audience Information Initiative, particularly Arts Oracle which will be a major medium for spreading the word about the benefits of data sharing.

E.7 Risks

There is a risk that organisations which are not currently sharing their data decide to continue with that position, despite the work of this project. This will have to be mitigated against by ensuring that the policy position takes account of a wide range of views, and is also backed up by case studies showing the potential benefits to all parties.

E.8 Who could do the project

A consultant with

- a wide understanding of the issues around data ownership
- Strong ability to solicit views from a wide range of arts organisations in the commercial and subsidised sectors
- experience of writing policy papers for the Arts Councils
- an ability to balance idealism with pragmatism
- a diplomat who will encourage and cajole rather than preach!



F. Project description – Artform Classification Systems

F.1 Summary

This project aims to produce a definitive high-level artform classification system which can then be used throughout the arts. It would be adopted by the Arts Councils and used in all their own research projects and data collection, and, through a process of advocacy it could then become ubiquitous across the whole industry. The aim is that it should be linked in some way to the existing high-level categories.

F.2 What the project will be

The three strands of this project will be:

- To develop and propose a high-level system, ideally based on existing schemes.
- To identify other more detailed systems that can be used to cover specific industry sectors as appropriate
- To work with the Information Warehouse project to write best-practice guides that illustrate the use of the new system, and to assist in publicising the system

The aim is to produce a two-level system with the top level containing no more than 10 categories, and the second-level providing up to 50 more sub-categories. The system should be able to be used at just the highest level where appropriate.

There are a number of existing systems that the project should review, including the TGI categories, the categories used by the different audience surveys commissioned by the Arts Councils (such as Arts in England or the Beaufort Omnibus survey), or the new set of categories used by Arts Council England as part of their grant management system. The project will need to consider the balance between the benefits that flow from mapping onto an existing categorisation with those that might come from starting afresh.

Various sectors of the arts (through organisations such as the TMA, ABO and RSC) have set up more detailed classification systems. This project should propose how these can be used alongside the new common system – the different alternatives can then be publicised via the Information Warehouse.

F.3 What the project will NOT be

An opportunity to reconsider the necessity for a more in-depth scheme.

F.4 Similar existing or planned projects

Many research projects (including data:crunch regional exercises) have needed to classify events. Although there have been some proposals as to ways to achieve a common system, including a paper on 'A Dewey System for the Arts' from Arts Marketing Hampshire, there have been no attempts to roll a system out to the whole constituency since the Arts*ACORN project in 1992.

F.5 Who is the project going to help

Artform Classification schemes are mostly used when comparing information from more than one venue so the key beneficiaries will be organisations which collect data or undertake analysis, such as Arts Councils, audience development agencies, local authorities, researchers and so on.

F.6 Partnership and buy-in

This new system will only be valuable if every organisation which collects and summarises data uses it, and part of the project is to develop a strategy to encourage its adoption. This

process should extend outside organisations which receive Arts Councils funding, especially if local authorities begin to use the proposed benchmarking system.

F.7 Who could do the project

The project requires:

- Hands on experience of cross-organisational classification schemes, ideally on multiple occasions
- Clear pragmatic thinking
- Simplicity of execution





G. Project description – Data Collection and Benchmarking system

G.1 Summary

This project (working title Arts Eye) has two interlinked purposes: to create a database tool that enables the easy collection of a range of data from arts organisations, and to develop a system to build useful benchmarks from that data.

The data collection tool could be used to replace existing systems, such as the RFO survey in England and Wales, the data gathering undertaken by some local authorities or exercises currently run by groups of organisations or umbrella bodies, but it is the success of the benchmarking tools which will ultimately draw in data from non-funded, commercial and amateur organisations.

The system would use the web as its primary data collection mechanism (although not exclusively). It would need to be designed so that organisations which submitted data could quickly and easily be able to extract summary and benchmark information in a form which could be used to assist in planning and evaluation.

G.2 What the project will be

The aim of the project is

- To provide high level attendance and business indicator benchmark statistics for all participating organisations
- To enable Local Authorities and the Arts Councils to collect accurate comparable information from their funded organisations.
- To provide a more complete picture of the arts organisations within the UK by the pooling together of Arts Councils and Local Authority and non funded organisations. This picture would include a total of provision (by artform), employment, customer spend (in certain specified areas), income and attendances.
- To show the power of collaboration

There are a number of key tasks to be undertaken:

- Identify existing data gathering exercises (such as those included below) to see whether they would be interested in becoming part of this project, and over what timescale
- Draw up, in consultation with key users such as organisations, agencies, arts councils, local authorities and umbrella bodies, a scheme of what data would be required for collection, and what the definitions of each data item might be. It would seem sensible to base this on an existing collection system such as one of the RFO surveys. There will clearly need to be a good deal of discussion brokered between these organisations in order to arrive at a single core set of data, governed by a single set of definitions
- Design which benchmark indicators would be produced, and develop a methodology for how these would be calculated by the system
- Design the way the system could group organisations to allow access to raw data and to create particular benchmarks. It will be essential to make this as flexible as possible, as well as easily understandable by users
- Pilot the system, perhaps in one defined geographic area, or using an existing grouping of venues
- Write guides to the best way for organisations to produce data to go into this system, and how they might make best use of the benchmarks that come out

G.3 How the system might work

Each participating arts organisation would initially be set up with permanent information on the web site including name, address, nature and type of organisation

They would be given a unique organisation code and password which would be used each subsequent time they visited the web site. This would be for either entering additional information, amending existing or viewing the benchmark results and comparing their own.

On an annual basis organisations would be required to refresh the following information:

- Number of employees and, within broad classifications, their roles
- Sources of income, broken down by type of funder, ticket sales, sponsorship etc
- Total marketing spend, total number of attendances
- Training budget
- Gross staff costs
- Number of members and membership income (where applicable)

On a quarterly or other period to be agreed (perhaps variable depending if the organisation is in receipt of funding or not):

- Total number of attendances, total number of bookers
- By official artform classification type: number of performances, total capacity, total number of ticket sales, total income
- Amount of income earned from additional sources: programme sales, food and bar sales
- Additional information as appropriate - for example Welsh venues would be asked about the number of Welsh language performances, certain local authorities might request specific information (wherever possible the managers of the web site would seek to align these requests - local authorities could then compare similar information)

Notes and guidance about compilation of the submissions and interpretation and use of the results would be found in the Information Warehouse. All submissions would be required to conform to the defined protocols and best practice.

All participating organisations would then be able to review national statistics and classified relevant benchmark information, against which they could compare their own. Benchmarks could be broken down by:

- Region
- Nature of organisation (touring, arts venue etc)
- Scale and size of organisation
- High Level Artform type

Funders would be able to see raw information for all organisations that they funded so, for example, a Local Authority would be able to see all of its own funded organisations. The Arts Councils could use this system as their vehicle for data gathering - whether for the RFO survey in England and Wales or for other ongoing monitoring purposes. Those funders would also have access to the benchmarks for the groups of organisations they fund which the system would build in real time from the raw data.

Another organisation would ordinarily not be able to see anyone else's raw data. However, the system could allow for groupings of venues to build their own benchmarks and share data (a consortium of presenting theatres for instance) and organisations would be able to specify others to join them in such a grouping. Organisations could also extend raw data access to funding body departments such as Stabilisation in England.



The incentive for non-funded organisations to submit data is that they would have access to the benchmarks – but no funders would be able to see their information. If an organisation did not submit figures for more than a year, they would be denied access.

The majority of the information is equally available to organisations both with and without computerised ticketing systems - this would therefore allow galleries, museums and small scale venues to submit and compare benchmarks on a par with ticketed admission and/or computerised organisations.

Whilst the technology of the web is ideally suited to this project, there will certainly be organisations who, for whatever reason, wish to submit information on paper, and receive details back in the same form. This will need to be accommodated, but not publicised.

G.4 Similar existing or planned projects

There are many projects to collect summary audience and business information:

- Arts Council RFO survey in Wales and England
- Local Authority annual returns from funded organisations
- Various agencies run 'how's business' surveys for their members (Arts About Manchester, The Audience Business)
- The TMA collects audience attendance figures from its members
- Some groupings of venues collect and analyse data themselves

There has also been a recent pilot in Essex where organisations used a similar web-based system to input data and clearly this project needs to learn from the experiences there.

Arts Council England is currently considering a revision of the RFO survey, and is investigating how to use the web as a collection mechanism.

G.5 Who is the project going to help

- All funding bodies to gather data more effectively and to be able to put it in realistic context – to establish meaningful targets for Performance Indicators
- All participating arts organisations to put their own attendance levels, funding and achievements into context

G.6 Partnership and buy-in

This project has a major partnership element because organisations collecting data may well need to make compromises in order to agree a common set of indicators. Buy-in from arts organisations in submitting data and using benchmarks is also fundamental to the success of this project.

G.7 Risks

- There are security risks to the raw information at organisation level and the system will therefore need to take every possible precaution to prevent unauthorised access
- The level of detail available from the benchmark information must also always ensure that it is high enough that results from individual organisations can be 'guessed'
- There are major buy-in risks which the project will need to research at the outset

G.8 Who could do the project

Skills required are:

- Excellent Project Management to keep the project on track



- Good technical competency
- Understanding of data collection and analysis issues, primarily on the web, but also with paper-based systems



H. Project description – Research Information Warehouse

H.1 Summary

The Research and Information Warehouse (working title - ArtsOracle) has four elements:

- It is a publishing house for key information about arts audiences commissioned by the Arts Councils
- It is a clearing house through which case studies and projects can be published and other relevant information can be gathered
- It is a forum for contributions from a wide variety of individuals – funders, practitioners, academics, consultants etc
- It is a focal point for other activity undertaken as part of the overall data initiative, both as a publishing point and also as an infrastructure to manage bookings for events such as 'Training the Trainers' courses

For ArtsOracle to be successful it needs to become a one-stop-shop for information about audiences that is accessible to anyone, whatever their discipline or level of understanding. Everyone should find something there that is relevant to them – 'how to' guides, clear definitions of terms, advice on lessons learnt by others in the field, high-level discussions on particular data sources and so on.

Because of the unique capabilities of the world wide web, it makes sense for this to be the principle communication medium for ArtsOracle. It is not, however, a web site for a web site's sake – it will only work well if there are fundamental objectives behind it which view the web as a means to an end, rather than an end in itself. There may be occasions in which ArtsOracle uses other media –conferences, publications, a telephone hotline, for example – as circumstances dictate in the future.

What will make ArtsOracle different will be the way it aims to combine 'official' definitive content from the Arts Councils of England, Wales and Scotland (and possibly Northern Ireland at a later date) with contributions from a variety of people –content specifically written for ArtsOracle and information previously published elsewhere.

Although it will seek out content from a huge variety of sources around the world, and will accept contributions from anyone, ArtsOracle will have an editorial voice and everything on the site will be categorised, indexed and commented on. A user of the website who looks at the write-up of an audience development project, for example, will get a clear understanding of what the ArtsOracle team believes are the key successes and failings of the project, in addition to those supplied by the organisation which wrote the project report.

As examples, subject to a degree of further feasibility work, ArtsOracle web site could contain:

- Definitive Arts Councils views on best practice and definition of terms
- Past, present and future research projects and case studies with editorial commentary and peer review
- Information and online booking for Arts Council-funded training programs and any other approved arts training
- Access to, commentary on and suggestions about use for ArtsEYE benchmark results and TGI area profile reports (if permission could be obtained for their wider dissemination)
- Full details of the standard system reports, their uses and how to compare them
- Explanation of the Data Protection guidelines, their implications and best practice.
- Lots of handholding 'how to do' articles on topics such as 'increasing frequency of existing attendees' or 'building an audience of families'



- A portal to other information available on the web – such as census or ONS data, with guidelines for suggested use and reference to the protocols
- A searchable index of terms, projects and resources available to arts administrators
- A listing of Arts Councils publications and other suppliers of relevant publications

ArtsOracle can also provide content for other websites, either by the use of links or through live 'feeds'. The Arts Marketing Association site could, for example, include a current listing of all marketing training compiled from the ArtsOracle training database.

The site would be aimed primarily at practitioners and consultants – having a very hands on feeling – although it is would provide information for policy makers, academics, researchers, local authorities and arts councils. Its aim is to be 'useful' rather than (merely) 'interesting'!

H.2 What the project will be

The objectives are

- To provide an outlet for disseminating definitive statements on definitions, protocols and best practice
- To provide a source of information about all aspects of working with audiences that is both useful and 'actionable'
- To set up an infrastructure to establish, maintain and develop a body of knowledge

The first phase will be undertake a small amount of research with likely users of the system to inform the content development phase.

The second phase of the project will be the setting up of a delivery infrastructure. It is very likely that this will need a team approach as the project needs a variety of skills, expertise and contacts including editorial responsibilities. The web site will need to be designed and built – it will need a complex database back-end which allows easy searching. It is essential that this team is not perceived by the industry to be 'judge and jury' in deciding what can and can't appear on the site. Whilst there is a clear need for a clear and consistent editorial voice, there also needs to be a very broad inclusive approach.

It will then be necessary to identify how existing providers of data can be involved in the project – see below for examples. In order to provide the 'one stop shop' approach, it will be extremely desirable to avoid duplication where possible and use existing systems to provide a whole chunk of content. However, if this is not going to meet the needs of users then it may be necessary to duplicate content as a last resort.

The final phase is then to begin to assemble content. Some other projects within the Audience Information Initiative will have outcomes that will be published as part of ArtsOracle – such as the Protocols and examples of Best Practice. Some other content will be written specifically for ArtsOracle – sometimes to state 'official' positions, sometimes to provoke debate by giving alternative views of issues. Case studies will need to be commissioned, such as descriptions of organisations that are using data well currently or write-ups of particular examples of the protocols in practice. The remaining content will come from elsewhere and will probably have been written for other purposes – where that content already exists on the web then it won't be necessary to duplicate it, but simply to have a link.

Some sections of the web site will contain Arts Councils official views, others will not (for example peer review of research). These will need to be clearly marked as Opinions or Statements. The guidelines published by fuel4arts.com in Australia seem wholly appropriate – see below.



Once the site is launched, a major element will be comments and contributions from users of ArtsOracle. These may be made directly from the site, but there will also be occasions where the ArtsOracle team commission comments about case studies or write-ups of research – a kind of ‘peer review’ which will mean that users of the site get a range of opinions about a piece of research or a case study.

Nothing would appear on the site as ‘definitive’ content without it having been reviewed by the Editorial team, but rather than ‘censoring’ content, the idea is that there will be an editorial ‘context’ added to each item of content. Some of this context will involve adding keywords so that the content can be found using a search facility. The site will also provide links to material elsewhere on the web and this will be clearly signposted to distinguish it from the official material. It is also very important that the Editorial team is not perceived as a barrier to publishing material and the process must certainly not be a barrier to getting information published quickly.

There will need to be a very flexible search engine which allows users to specify their level of knowledge as well as the area they are looking at. This will be the principal way in which users will interact with the site and there will need to be much concentration on this area. When search results come up, users should get very quickly to the commentary which will allow them to differentiate between the ArtsOracle editorial view and the views of others.

There are a number of other key concepts that underpin ArtsOracle:

- It needs to provide ‘something for everyone’ – whatever their level of interest or understanding about a particular issue. The editorial team will need to work hard to ensure that any gaps are filled
- ArtsOracle needs to be clearly defined as a ‘business to business’ model – it is not designed to be used by individual artists or to have any artistic merit itself
- The content doesn’t need to be restricted to the UK. Indeed, the nature of the web means that it is very easy to bring together content from around the world, much as fuel4arts.com has done
- Users will need to register to use the site. This will be free, but it will allow detailed tracking of the behaviour of users, as well as ensuring that the editorial team have contact information for anyone who is submitting content
- A site of this kind is essential to the delivery of other projects recommended by this report – especially the standards and protocols and the examples of best practice

Part of the ArtsOracle team’s work will be to communicate with users frequently to draw them back to the site as new content is published. This will be by email, and it may be possible to tailor these to users using the preferences they give when they sign up.

There will also need to be an ongoing campaign to draw users towards the site. This may use online activity (email campaigns or links to websites) but it will also need to use offline media such as articles in publications and advertisements. It is also possible that the ArtsOracle team will be asked to address conferences and meetings to publicise the service. If there are occasions where the conference needs to address the wider Audience Information Initiative then this will also be the responsibility of the ArtsOracle team, alongside Arts Councils officers.

H.3 What the project will NOT be

Purely good news reviews – in order for the comments and commentary to be taken seriously and to be of most help, there must be some honest individual opinions expressed. Strongly academic in tone. The overriding priorities are relevance and application. It should be informative rather than just information.



H.4 Similar existing or planned projects

The Australia Council (the governmental funding body) has established the web site fuel4arts.com and sends out regular emails to subscriber to its free list. The site is edited and managed by a third party. It is a huge and very exciting site which runs bulletin boards, discussion forums, case studies, articles, reports, publication listings, events listings, expressions of interest message board and a specialist directory. There are currently over 9700 subscribers and about a third of these are based in the UK.

ArtsMarketing.org is an American web site supported by Arts & Business Council. The National Arts Marketing Project (NAMP) which they set up consists of Basic Marketing Workshops, An advanced training programme, the web site ArtsMarketing.org and a national conference. The web site offers Case studies and Research Reports that are printed and mailed – at a price of \$6.50 per study and Marketing Resources which cover Hot topics, recommended books, marketing workshop listings, resource links and a glossary of terms. Most of the content only refers to courses, or lessons run by Arts & Business Council associates – it does not claim to be comprehensive.

The Arts Marketing Association (AMA) runs a web site which contains, amongst other things, a listing of available training courses – with a marketing slant. It is proposed that ArtsOracle could contain a more complete listing of training courses and provide a feed directly into the AMA web site (with a credit) which could potentially link into ArtsOracle's online booking system for training courses.

The New Audiences web site contains indexed write-ups of projects which were funded by the New Audiences initiative. It is suggested that as the funded projects are coming to an end, the historical content of the web site be incorporated into ArtsOracle.

Arts Research Digest run by the University of Northumbria runs a digest which is published 3 times a year and aims to summarise cultural research from the UK and overseas. The digest is currently seeking to enhance its online presence.

Arts Research Digest is currently also collaborating with SAM's books, Arts Professional magazine and the University of Sussex in a project called Knowledge Services or KSAM which has been established with the assistance of ACE CPD funding. We understand that they are towards the end of their current 3 year funding.

H.5 Risks

The combination of 'official' and unofficial content could potentially cause concern. However it is proposed that the different content be clearly marked. Those sections which are opinion only will be identified.

There is a risk that unfavourable comment on the web site could be taken up publicly and used out of context. It is proposed to make comment about the policy of honesty and openness on the main section of the website and to anonymise and edit peer review to protect contributors.

H.6 Who could do the project

It is suggested that a team be appointed on a three-year contract to design the technical specification, administrate and commission the content and promote the site.

This team could need the following attributes:

- Detailed knowledge of the arts community incorporating a wide range of viewpoints and contacts



- Good editing and writing experience
- Detailed technical understanding of Web sites and their capabilities
- Respected and impartial members of the arts community



Role of the Editor & editorial team

- To ensure the legality of all content
- To liaise with the participating Arts Councils steering group(s) to approve 'official' content
- To design the functionality of the web site
- Promote the site and its content
- Seek out new content and opinions





I. Project brief – Skills Development Programme

I.1 Summary

The project involves creating a suite of training courses aimed at staff who come into contact with audience data within ticketed and non ticketed organisations (this could be box office managers, marketers, fundraisers, education staff, administrators etc).

The aim is that training professionals from arts councils, agencies, umbrella bodies, freelance consultants or educational establishments would run the courses themselves using materials prepared by this project and provided free.

Anyone wishing to run a training course using the materials provided would be required to attend a specific 'Train the Trainer' course in that topic.

I.2 What the project will be

The objectives of this project are

- To increase the general level of understanding and use of audience data by making a standard series of training courses widely available
- To involve Arts Councils, Agencies and other professionals in the understanding and delivery of the overall audience data initiative

This project is to design a suite of training courses in 3 stages – starter, intermediate, and advanced – designed to cover all areas of the use and understanding of audience data. Separate courses would be designed for box office staff, marketing staff, fundraising staff and those whose job covers all these areas (most probably on the smaller scale). There are therefore 12 distinct courses but there will clearly be large elements of overlap.

The courses should be designed in stages where each level leads on to the other. Clear entry requirements for each course should be established.

A series of 'Training the Trainer' courses will need to be designed and run in England, Scotland and Wales which prospective course deliverers would attend to refine their training skills and gain a through understanding of the specific course and of the protocols. These 'Training the Trainer' courses would need to run on an ongoing basis. All course administration would be run by the Information Warehouse team.

There would need to be a quality control process that began with the development of the courses and continued to monitor the delivery process. It may be possible to link with an existing validation authority such as a university in order to ensure that the quality control systems related to the wider national training and qualifications picture.

I.3 What the project will NOT be

- An opportunity to reconsider the protocols and guides to best practice
- Actual delivery or administration of the courses themselves (although the 'Training the Trainer' courses are to be delivered as part of this project)
- It will not involve the administration of the 'Training the Trainer' courses

I.4 Similar existing or planned projects

Many agencies currently run training courses which tend to be on an ad hoc basis. Some umbrella bodies run training courses and it is possible that others are considering this too. There are also a small number of commercial training providers in this field.



1.5 Who is the project going to help

All arts administration staff at all stages of their career to improve both the understanding of the power and potential of audience data, and the skills required to make best use of it.

1.6 Partnership and buy-in

Those organisations that will be likely to deliver these training courses will need to have confidence in the courses.

1.7 Risks

There is a risk that organisations which are really in need of training don't attend because they don't recognise their need. It is recommended that after the first year, funding bodies consider some form of recommendation, or perhaps even compulsion, to encourage funded organisations to send staff on these courses.

1.8 Who could do the project

- A very experienced trainer who has a thorough understanding of both the issues surrounding data use and the arts environment
- A trainer with experience of both ticketed and non-ticketed organisations.
- A trainer with many years experience of compiling professional courses and running 'train the trainer' programmes.
- A trainer with hands on experience of the use of data and the capability to become fluent with the protocols and guides to best practice.
- A trainer with a through understanding of the day to day issues of box office managers, marketing managers and fundraisers.



J. Project description – Management Development and Advocacy projects

J.1 Summary

This would be an 18-month project to work with a specific group of managers from a wide range of arts organisations to explore and refine methods of using audience data to better inform the planning and day to day running an arts organisation. The findings of the group – both good and bad – would be used as case studies to establish and spread best practice throughout the industry.

J.2 What the project will be

The aims of this project are

- To spread acceptance of the value of audience data for business planning and day to day management within arts organisations and to encourage managers to incorporate the use of audience data into the way they make decisions so that it can be used alongside innate knowledge and understanding, on an equal footing
- To work with a representative range of arts organisations across scale, geography and artform with potential participants nominated by an Arts Council or other body such as local authority. Participants would need to be broadly receptive to the idea of using audience data, but they should not be from organisations which are currently well advanced in this field.
- To use peers to advocate best practice to managers
- To illustrate the Arts Councils commitment for arts organisations to use audience behaviour to inform planning and management throughout the organisation
- To refine tools for organisations both with and without computerised ticketing systems.

Participants will receive mentoring from the project consultant in changing the way their organisation works – helping them to find ways of getting to know more about what audience data is available to them, seeing how this can be included in the business planning process, and how to set up systematic ways of ensuring data use on an ongoing basis. The consultant will support the manager throughout the project, visiting each participant twice a year. At the end of the programme, organisations will write up case studies.

It is anticipated that individuals will work together in cluster groups so that they have other people to talk to during the project and brainstorm ideas. These groups may also get together to receive training.

There is a need to consider what happens to managers who leave their organisations part way through the programme – a decision will probably need to be made on a case by case basis as to whether to continue working with the manager in their new post, to pick up with the new manager or to drop that organisation from the project.

The group of participants will need to include at least one person from each of the following sectors (although some are likely to fall into two categories):

- Organisations in Wales
- Organisations in Scotland
- Small scale touring
- Large scale touring
- Medium Gallery
- Middle scale venue
- Festival

- Small scale arts centre
- Mostly local authority funded

The consultant for the project will also need to be involved in the dissemination phase of the project, after the work with the managers is completed.

J.3 What the project will NOT be

This will not be another 'project' for the arts organisation – a way of getting funding to do some piece of activity. It's about process rather than outcome – helping to refine business planning, artistic decisions, marketing planning and operations.

J.4 Who is the project going to help

The project will provide the Arts Councils with case studies of the impact of using audience data which can be used both internally and externally for advocacy purposes. The widespread adoption of refined techniques for utilising audience data and behaviour should help arts organisations to plan, and manage day-to-day activities, better.

J.5 Partnership and buy-in

The main partners will be the organisations who take part in the project.

J.6 Risks

It might be found that the use of audience data does not significantly help most of the organisations, but this would seem unlikely. There is a risk that organisations sign up to the project but do not maintain their commitment throughout the period. Participants would be given a clear specification of the time involved and would sign up to this when joining the project. Very regular in person and phone contact with the managing consultant will provide a focus for efforts.

J.7 Who could do the project

A consultant who had successfully run an arts organisation in the past. Good trainer and mentoring skills. Wide range of experiences with different scale of organisation. Experience or understanding of organisations without direct access to ticketing system data.





K. Project brief – Arts Councils training programme

K.1 Summary

There are a number of officers in the three Arts Councils who come into day-to-day contact with client organisations – regularly funded organisations, project grant recipients, lottery grant recipients, applicants for funding, and so on. Often these officers have a background in artistic programming, but their responsibilities mean that they need to be conversant with all business aspects of the arts too.

This project is a training programme to bring Arts Council staff up to speed with the issues behind the Audience Information Initiative – how arts organisations could gain benefits from using audience data in a structured way – and with the specific developments themselves, such as the Data Collection and Benchmarking system or the Research and Information Warehouse.

K.2 What the project will be

The tasks to be undertaken are

- To develop a high level of understanding across staff of the three Arts Councils about the potential benefits of using audience data
- To inform those staff about the key elements of the work commissioned by the Arts Councils following the scoping study report
- To encourage those staff to communicate this knowledge to the organisations with which they work and to encourage wider adoption of the Initiative aims and outcomes

This project will comprise a series of 1 day training courses for officers in England, Scotland and Wales. It will also enable officers from different departments (and potentially countries) to meet and share ideas.

The course will cover:

- consideration of how audience data is collected, stored, used and abused by arts organisations
- dissemination of the protocols and guides to best practice
- use of the Research and Information Warehouse and all the training courses and materials
- Review of Data Collection and Benchmarking System, its aims and uses
- Discussion about how audience data and business indicators can assist with the running and management of arts organisations

K.3 What the project will NOT be

Administration of the courses (this will be done by the Information Warehouse team)

K.4 Who is the project going to help

This project is designed to assist client-facing staff of the Arts Councils to keep up to speed on the latest thinking around Audience Data. This will have additional benefits to the Arts Councils (by increasing the general level of knowledge and helping organisations get the best from the funding investment). It will also have clear benefits to arts organisations because they will either have an ally if they have already embarked on using data, or because they will be learning how to do it for the first time

K.5 Partnership and buy-in

Arts Council officers will clearly need to understand the reasoning and benefits underpinning the overall initiative so that they buy into it sufficiently to ensure progress.

K.6 Who could do the project

Very experienced trainer, who had considerable experience working with Arts Councils officers, ideally across Scotland, Wales and England.





L. Project description – Evaluation Framework

L.1 Summary

There are a number of reasons why all the projects as part of the Audience Information Initiative need to include an evaluation element.

- The overall impact of the Initiative needs to be measured as far as is possible, especially as the impact and value is likely to be complex and sophisticated.
- Each project needs to be able to report its outcomes in a way which is easily comparable
- The way in which the projects interact needs to be evaluated alongside the outcomes of the projects themselves
- The projects that make up later phases of the Initiative need to take into account lessons learned in earlier projects
- Proving the effectiveness of projects, and demonstrating the impact they have, will be crucial, not only for the Initiative funders but also as a key factor in the take up of the Initiative's 'message' by the arts sector

This particular project will therefore devise an overall framework of evaluation criteria and methodology which will be used throughout the Audience Information Initiative projects. Projects will be required to use this framework, and the evaluation consultant will also be available to provide a small amount of ongoing guidance to each project.

L.2 What the project will be

The objectives are

- To ensure that all projects have a consistent evaluation methodology.
- To provide support to each of the project consultants during the lifetime of their projects

This evaluation project will consider the briefs for all the other projects, alongside the overall Initiative objectives, and formulate a package of evaluation methodology and criteria including the key success factors. An evaluation manual will need to be produced which can be supplied to the consultants undertaking each of the other projects. It may be possible for this to be achieved with a single approach, or it may be that the methodology needs to be tailored to specific projects.

After the overall approach is written and approved, the consultant will then need to work with those undertaking each of the individual projects to provide support to them in planning their own detailed evaluation methodology, undertaking whatever baseline research is necessary before they start work, making continuous adjustments to their project through ongoing evaluation and producing a final report once the project is over. All of this detailed evaluation work will be done as an integral part of each project with the evaluation consultant providing a small amount of support.

The evaluation consultant will also be responsible for preparing an annual summary of the progress of the Initiative as a whole, based on what the individual project consultants report.

L.3 Who could do the project

A consultant experienced in producing ongoing evaluation frameworks, ideally for arts projects.