A Review of Touring Theatre and Dance in Scotland:

Final Report, April 2017

CREATIVE SCOTLAND
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Contents

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Introduction

1:1 Background

Creative Scotland is the public body that supports the arts, screen and creative industries across all parts of Scotland on behalf of everyone who lives, works or visits here.

A core ambition for Creative Scotland is that everyone can access and enjoy artistic and creative experiences. This is reflected in the key priority 'to strengthen presentation, touring and distribution of work, including through digital platforms and encouraging collaboration.' (Creative Scotland 10 year plan, 2014).

Creative Scotland funds touring theatre and dance through both Open Project Funds and Regularly Funded Organisations (RFOs). Supporting both producers (theatre and dance companies) and promoters such as venues and touring networks.

Creative Scotland's Arts Strategy 2016/17 identified that 'Touring, exhibition and other means of distributing and sharing work is a concern for organisations as highlighted in the Sector Reviews. This is especially true for the performing arts (theatre, dance and music) where a growth in audiences remains a priority. This is key for increasing opportunities for access and delivering greater financial contribution to the viability of venues and producing companies. While working digitally can complement this, the live experience is still fundamental for many.' (p21).

1:2 The Project

Creative Scotland attends the Touring Forum which is facilitated by the FST **(Federation of Scottish Theatre)**. This network voiced a number of concerns around the health of theatre and dance touring in Scotland of which perceived diminishing financial resources for both promoters and producers is paramount.

Discussions through the forum identified a need to better understand how the sector operates, how it has changed in recent years and gain a better understanding of the impact of Creative Scotland's funding in this area.

This report focuses on touring within Scotland. There is a broader context within which Scottish artists and productions also tour to international markets and networks, and a further commercial touring circuit which is not covered here. The emphasis of this Review was not to find touring success stories from Scotland to celebrate, but to uncover key themes and issues affecting the sector.

Through in-depth consultation with a sub group of the Federation of Scottish Theatre's Touring Forum, Creative Scotland identified research questions which were developed into a research approach with four strands of enquiry (detailed below).

Strand	Research Methodology
1. What does the touring environment look like?	Quantitative analysis of the data currently held by Creative Scotland and partner agencies. Carried out by Creative Scotland's Knowledge and Research Team.
2. What are the fees / funding arrangements?	Online questionnaire of venues and producers using FST database. Carried out by Creative Scotland's Knowledge and Research Team.
3. Do promoters and producers think touring in Scotland is successful?	Qualitative data analysis through managed focus groups and one to one interviews with key people. Conducted by Lisa Baxter
4. How does touring in Scotland now compare with other models?	Desk research and feedback from focus groups. Conducted by Claire Dow

Quantitative work (Strands 1 and 2) were carried out by Creative Scotland's Knowledge and Research Team. Qualitative Research and a Literature and Practice Review (Strands 3 and 4) were carried out by external researchers, Lisa Baxter and Claire Dow respectively, who together pulled all the findings of the Review into this Final Report.

There are five reports in the review which can be accessed on the **Creative Scotland website:**

Final Report:	**A Review of Touring Theatre and Dance in Scotland**
Strand 1	**Data Analysis of Creative Scotland Funded Touring 2012 – 2016**
Strand 2	**Industry Survey of Producers and Promoters**
Strand 3	**Qualitative Research into Touring Theatre and Dance in Scotland**
Strand 4	**Literature and Practice Review**

Executive Summary

2:1 Introduction

Discussions through the Federation of Scottish Theatre's Touring Forum identified a need to better understand how the sector operates, how it has changed in recent years and gain a better understanding of the impact of Creative Scotland's funding in this area.

Through in-depth consultation with a sub group of the Touring Forum, Creative Scotland identified research questions which were developed into a research approach with four strands of enquiry:

Strand 1. What does the touring environment look like?

Strand 2. What are the fees/funding agreements?

Strand 3. Do promoters and producers think touring in Scotland is successful?

Strand 4. How does touring in Scotland now compare with other models?

The sector is wide and varied in terms of scale, product and funding models with both subsidised and commercial output, a huge variety of venues and many different genres within the art forms of dance and theatre. While this review looks only at work by companies and venues based in Scotland, and mainly concentrates on the subsidised sector, it is cognisant of this wider ecosystem in which it operates.

This review has brought to the surface a wealth of contradictory and intersecting viewpoints that paint a detailed and complex picture. The key findings are presented here.

2:2 Integrated Findings

2:2:1 Strategic overview

Touring does not currently benefit from the advantages that come with a clear strategic focus. Focus group participants believed the touring theatre and dance sector would benefit from developing a shared vision, a clear set of strategic priorities aligned to ring-fenced funding and clear success criteria that everyone can work to.

Some of the issues the research uncovered are:

- Producers find that project funding supports short-term activity at the expense of long-term development.
- The low incidence of repeat funding can inhibit artistic development, progression and continuity.
- Funding has not increased in line with costs.
- Producers are sending out shorter tours, with small cast sizes.
- Programmers and promoters are experiencing increasing budget pressures, are seen as becoming increasingly risk-averse and programming fewer performances.

These factors combined are impacting on continuity of provision, strategic relationship building and sustained audience development.

2:2:2 Funding for touring in Scotland

The dominant view from programmers and producers is that funding for touring is not working. Costs are increasing, and touring theatre and dance in Scotland is heavily reliant on public subsidy primarily through Creative Scotland and Local Authorities.

The effectiveness of current subsidy for touring theatre and dance is unclear. Subsidy and cross-subsidy flow amongst and between numerous parties with no systemic understanding of its movement or efficacy.

The issues raised here were diverse and complex: the financial model of venues supporting a diverse programme by internally subsidising risk is vulnerable to increasing financial pressures and a balance of supply that favours smaller-scale work; there has been a shift in the way tours are underwritten due to the increasing financial pressures programmers face and the resulting need to negotiate tougher deals and recoup some of their costs through contras; producers who are subsidised to tour are seen as increasingly bearing the brunt of the risk, and thus their exposure to it. They find themselves squeezed from both sides (funders and programmers), with little increase in funding awards, despite rising costs and shifting deal-making which reduce the margins required to support tour extensions.

Other models are being used across the UK and internationally including consortia working, commercial approaches and support from trusts and foundations which may be of value.

2:2:3 Product

The absence of strategic priorities for touring in Scotland means there are no systems in place to influence the touring ecosystem across genres and scales.

The prevailing view from programmers is that the current product pipeline is making it increasingly challenging to maintain a diverse and balanced programme. They believe Creative Scotland has an implicit funding priority to support lower cost, small scale and new work. They also believe that there is a scarcity of middle scale work, which limits their capacity to internally subside risk because of the impact on box office income.

The analysis of funding data upholds programmer views that the vast majority of work supported is new, small-scale work.

There appears to be unresolved tensions between programmers who believe there is an over-supply of dance, which, in their view, can be of low quality and which the market cannot support and dance-makers who believe their work is being de-prioritised by some programmers.

2:2:4 The touring environment

The review uncovered a number of difficulties around tour booking including the difficulty in maintaining a consistent year-round programme of work in venues, due to seasonal bottlenecks of supply, a phenomenon which is not assisted by the rolling nature of the Open Project Fund; a practice of pencilling in work where some programmers admit using them to hedge their bets by holding multiple shows against a single date; and a demand for a centrally managed, authoritative and up-to-date resource to streamline tour booking and programming in a complex and rapidly evolving sector.

The review also pinpointed issues in relation to distribution and reach.

Distribution: There is a high concentration of small-scale companies based in the urban centres of Edinburgh and Glasgow which may not be representative of the distribution of talent. Postcode mapping and Local Authority analysis of the touring work supported showed a high variance in areas toured to. Across the central corridor work is more poorly shared across the Local Authority areas and concentrated in Glasgow and Edinburgh, which suggests that companies do not tour widely close to home.

One Night Stands: Producers are frustrated at the rise of single night bookings, usually on a Thursday, Friday or Saturday night. This creates hidden costs around empty days, limiting the duration and reach of the tours and precluding the opportunity of word of mouth to build audiences.

Touring Networks: The touring networks are a pivotal point of access in joining up the touring circuit and sharing work with local promoters. Where they are funded project-to-project they are at risk, as the networks can withdraw at any point and leave the local volunteer promoters unsupported.

Length of Tour: Tours are getting shorter because of leaner funding, increased costs and deals that result in unreliable income which can often mean that producers do not have the margins available to fund tour extensions.

Efficiency: Some producers were concerned that their tours have become less cost and carbon efficient as they are unable to secure well-routed tours.

2:2:5 Key relationships

There is compelling qualitative evidence that professional relationships within the sector may not be as healthy as they could be. Producers and programmers are frustrated that they don’t have the capacity to invest the time and resource needed to develop informed or durational relationships. They acknowledged that, as a result, they can find themselves operating from a limited understanding of each other’s priorities, and that the exchanges between them are too often reduced to the transactional requirement of booking a slot and negotiating a deal.

Producers believe that there has been an appreciable shift in the balance of power to the programmers, and both programmers and producers have experienced a considerable degree of discomfort around negotiating the deal.

There is a strong appetite for dialogue and exchange from those who took part in the research, with suggestions around regular showcases of work and industry events that look at sharing practice and developing mutual understanding.

2:2:6 Audiences

The current touring ecosystem presents a number of challenges in relation to attracting, retaining and growing audiences due to shorter tours, a high turnover of touring companies and a perceived under supply of mainstream mid-scale work and over supply of small scale new work.

High volume programmes and limited capacity mean venue marketing can often be generic, with the marketing of one-night stands and riskier work de-prioritised in favour of more commercially viable events. Producers pointed out the contradiction behind programmers booking their work to attract audiences to a diverse programme, but then not investing in the opportunity to build audiences through word of mouth by booking them for a single night only.

Programmers find that the supplied marketing collateral can often be written from an artistic perspective which then has to be ‘decoded’ by the venue marketing departments into a language audiences can understand.

Audience development, unless specifically funded, is rare, and programmers admit they may operate from a limited understanding of their communities and potential audiences.

Not enough dialogue takes place between producers, programmers and marketing staff to inspire staff teams and develop a shared understanding around the work and audiences.

2:3 Conclusions and Recommendations

The review has surfaced many complex and inter-related issues regarding touring theatre and dance in Scotland. There is no quick fix or single-approach solution.

These conclusions and recommendations do not attempt to unilaterally solve the issues. Rather, it offers a distillation of the key issues with associated recommendations to further thinking, prompt discussion and inform action.

2:3:1 The need for a strategic focus for touring

- Establish a strategic framework for touring.
- Establish a touring fund driven by a renewed vision and clear strategic priorities around artistic quality, audience development, reach, balance of genre and scale, depth of engagement, efficiency, sustainability, continuity and progression.
- Introduce protocols to safeguard Regularly Funded Organisation (RFO) commitment to a balanced, diverse programme of work.
- Seek ways to align national, RFO and project funded companies around the shared goal of developing audiences for Scottish work in a way that is mutually beneficial and advances the touring infrastructure.
- Ensure proven high quality work is given an extended life to reach more audiences.

2:3:2 An active sector in need of sustained support

- Longer-term funding agreements for touring companies.
- A dedicated funding stream designed to support creative partnerships (producer and programmer), and/or specific initiatives to underwrite the risk, over a fixed term period to encourage longer-term planning, continuity of provision, strategic relationship building and sustained audience development.

2:3:3 Deteriorating professional relationships

- Create opportunities for dialogue and exchange.
- Establish regular seasonal showcases of new work.
- Establish clear priorities and guidelines in relation to the different stages of developing a tour (R&D, Development, Production).
- Consider working together as a sector to establish an accord around best, and most ethical, practice.

2:3:4 Tour booking and programming are unnecessarily difficult

- Explore the viability of establishing more aligned programmer planning cycles, and include funding cycles in the consideration.
- Establish a touring fund with transparent funding mechanisms, longer lead-ins, clear guidance of what is expected, and allows for better forward planning.
- Support a centrally managed national resource that aids communication between producers and programmers.
- Initiate a benchmarking exercise to establish clear, evidence-based expectations around the costs of touring, pay rates, fee structures and anticipated audiences in relation to genre and scale.
- Establish regular showcases where producers and programmers can meet to share/discuss works-in-progress, deepen mutual understanding, build relationships and share working practices.
- Form regional/national touring consortia which would collaborate on establishing efficient touring 'highways' that producers can tap into.

2:3:5 There is an unfathomable money-go-round of subsidy

- Commission an in-depth economic review of the movement and effectiveness of current subsidy and examine how it might be better applied.
- Explore the viability of alternative funding approaches within an evolving touring and economic landscape.
- Explore new models of working that could reduce reliance on subsidy and support enhanced sustainability.
- Encourage relationships with trusts and charitable foundations.
- Initiate a benchmarking exercise to establish clear, evidence-based expectations around the costs of touring, pay rates and anticipated audiences in relation to genre and scale.

2:3:6 A confusing picture around the product pipeline

- Establish a strategic framework for touring.
- Introduce protocols to safeguard venue-based RFO commitment to balanced, diverse programmes of work.
- Conduct research to uncover the sales trends, capacities and market demand for dance and theatre touring.
- Following analysis of market and audience data, instigate a strategic programming or audience development initiative around dance.

2:3:7 A need to improve reach and distribution

- Look to address the gaps in distribution in the central corridor of Local Authority areas, and in the least visited areas.
- Establish long-term funding for touring networks to secure continuity.
- Examine ways to pool resources to generate work with a longer life and more resources through consortia.
- Establish targeted programmes of residencies and audience development to support touring work.
- Review priorities around the volume and balance of productions funded to tour by genre and scale.

2:3:8 Audiences do not sit at the heart

- Develop systems to gather and share audience demographic data.
- Develop alternative touring and funding models designed to support strategic audience development partnerships.
- Trial and share innovative marketing and sustainable audience development approaches, which encourage repeat visits and longer stays, and include a focus on depth of engagement and local impact.
- Support the development of work that is locally or regionally situated, and has increased capacity to resonate with audiences and communities.
- Develop training for producers to inform the creation of audience-centric marketing collateral.

2:3:9 Creative Scotland data could be streamlined

- Creative Scotland continue to measure against benchmarks established in Strand One of this research project.
- Monitoring forms are reviewed to ensure a standardisation of answers, with appropriate guidelines for reporting.
- Open Project monitoring forms and RFO monitoring forms be aligned to collect comparable data. Explore online reporting options to make collation and reporting easier.

Integrated Findings

This review has brought to the surface a wealth of contradictory and intersecting viewpoints that paint a detailed and complex picture. This section presents the most significant, overarching themes and issues raised. It includes a number of tables that compare the relevant findings from the qualitative research study with, where possible, the results of the data analysis and sector survey in order to make meaningful comparisons between the two and identify gaps in knowledge which may need to be addressed.

3:1 Strategic Overview

3:1:2 Sector is not aligned around a shared vision

The touring dance and theatre sector in Scotland does not appear to have a clear vision, strategic priorities or explicit success criteria with which to unify and galvanise everyone around a deeply held shared purpose. This is compounded by the absence of a specific touring strategy or fund from Creative Scotland which currently supports touring work through two main programmes: Regularly Funded Organisations, which includes both touring companies and venues; and Open Project Funding which is open to all projects across any art form, including touring theatre and dance.

3:1:3 The need for strategic priorities

Following on from the above, focus group participants believed the sector would benefit from a clear set of strategic priorities aligned to ring-fenced funding for touring. The priorities they would like to see are:

- Fresh, brave thinking to navigate the changes they believe the sector needs to undergo.
- Sector alignment around a shared vision.
- Establish strategic funding priorities and mechanisms everyone can subscribe to.
- Create a transparent funding mechanism that supports the best chance of a successful application.
- Do less, better.
- Greater industry dialogue and exchange.
- A centrally managed approach to showcasing work.
- Support deeper, more sustained audience engagement.
- Working better together.
- Investment in marketing and audience development.
- A centrally managed resource for tour booking.

3:1:4 Developing sector-wide criteria for success

There is no clear sector-wide understanding of what a successful touring theatre and dance sector looks like. Programmers and producers believe there is need for clear success criteria that everyone can work to, criteria that aren't wholly predicated on income and audience numbers. The following is a distillation of the key points made when asked to suggest success criteria for the sector:

- There would be a clear sector-wide understanding of what a successful touring theatre and dance sector looks like and the steps needed to develop touring ready work.
- Audiences across Scotland would have year-round access to a range of high quality work of different genres and at different scales.
- The touring theatre and dance sector would be relevant to audiences and seek to engage them beyond the stage.
- The touring theatre and dance sector would be efficient, sustainable and thriving.
- The touring theatre and dance sector would be powered by astute audience and marketplace data.

3:2 Funding for Touring in Scotland

Touring theatre and dance in Scotland is heavily reliant on public subsidy primarily through Creative Scotland and Local Authorities. Public subsidy allows companies to develop work which does not have a commercial emphasis; develop new work; and tour work widely reaching a broad range of audiences. Both the production and the promotion side of the sector are subsidised with the majority of venues and promoters receiving support from either Local Authority or Creative Scotland or both and most producers supported by Creative Scotland Open Project Funding or Regular Funding.

Where do funds come from?
In the survey of producers and promoters in Scotland (Data Strand 2) respondents stated that their touring programme was supported by the following sources:

- 55% received Creative Scotland Regular Funding.
- 16% received other funding from Creative Scotland.
- 58% received funding from a Local Authority / Cultural Trust.
- 19% received private sponsorship.
- 3% received funding from an academic institution.
- 19% stated other types of funding including Awards for All, British Council, Co-Producers, Arts and Business Scotland, SEPA, Friends of Scottish Opera, Crowdfunding, Box Office, Trusts and Foundations, AYAN, Scottish Government MPA Funding, Edinburgh Science Festival and NPN Munich/ACE.

This suggests that public support plays a central role in the support of touring. However, organisations are working to diversify their income and other sources play an important role.

3:2:1 Creative Scotland support for touring

Creative Scotland has two main programmes which support theatre and dance touring: Regular Funding which supports organisations include both touring companies and venues; and Open Project Funding which is open to projects across any art form including touring theatre and dance.

Both funding programmes support projects that will meet the ambitions of Creative Scotland's 10-year plan.

We want Scotland to be a country where:

- Excellence and experimentation across the arts, screen and creative industries is recognised and valued.
- Everyone can access and enjoy artistic and creative experiences.
- Places and quality of life are transformed through imagination, ambition and an understanding of the potential of creativity.
- Ideas are brought to life by a diverse, skilled and connected leadership and workforce.
- Scotland is a distinctive creative nation connected to the world.

Source: Unlocking Potential Embracing Ambition: **Creative Scotland 10-Year Plan 2014-2024**

Creative Scotland's Regular Funding application guidance 2015-18 refers to touring companies under Balancing the Portfolio, where size and type of companies will be taken into consideration. In 2015/16, 33 RFOs toured theatre or dance work and many more RFOs play a vital role in the venue circuit.

The **Open Project Fund**, which was launched in late 2014 helps artists *"explore, realise and develop their creative potential, widen access to their work, and enrich Scotland's reputation as a distinctive creative nation connected to the world"*.

While both Open and Regular funds operate within Creative Scotland's 10 Year Plan and five ambitions, neither fund clearly sets out strategic priorities relating to touring work. This open, non-directive approach is relatively new and has evolved from far more structured funding arrangements.

Prior to the launch of the Open Fund in 2014 Creative Scotland had a structure of cross-art form funds for different purposes. This included **'Quality Production'** and **'Touring, Festivals and Arts Programming'** both of which supported touring work.

Creative Scotland's predecessor body, the Scottish Arts Council had a **Theatre Touring Strategy 2006 - 2011**, a clear working document which supported touring in Scotland through clear priorities and specific objectives.

The strategy had explicit aims to improve communication between all areas of the sector; to support producers; to support promoters and venues; and to encourage a larger number and broader range of people to attend and participate in touring theatre.

One of its stated purposes was to *“clarify Scottish Arts Council’s thinking and priorities about touring to the sector”* and to *“act as a communication tool between the Scottish Arts Council and the sector”*.[1]

3:2:3 Perceptions of Creative Scotland touring support

The dominant view from programmers and producers is that funding for touring is not working. The Open Project Fund is regarded as the source of many of the issues they face and the effectiveness of the subsidy was called into question. The issues raised were diverse and complex.

- There is a perception by some that Creative Scotland prioritises high volume output and does not operate from an informed understanding of the costs around touring. Some producers feel pushed into cutting budgets down to the wire, impacting on ambition, production values, employment, pay, the capacity to tour, health and well-being.
- Programmers believe the Open Project Fund prioritises small-scale, riskier work over larger-scale more mainstream companies, distorting the balance of supply and demand in terms of genre, scale, distribution and reach. This, combined with the absence of a strategic funding priority to ensure diverse programme, means touring may not be adequately meeting the actual needs and appetites of all of Scotland’s audiences.
- The perceived front loading of Creative Scotland’s investment into the creation of new and development work, some of which does not go on to tour, or tour extensively, is regarded by programmers and producers as a poor use of funding.
- The rolling fund has impacts on the system of co-ordination between programmer and producer, dislocating planning timelines and introducing a high degree of uncertainty into the system as programmers and producers await the outcomes of the funding decision. Some focus group participants commented that previous deadline-based funding programmes were more efficient.
- As a project fund, companies are less able to embark on long-term planning, partnership building, collaboration and progression.
- As an open fund, producers feel disadvantaged by the absence of clear touring priorities. In addition, the perceived lack of transparency and dialogue around Creative Scotland’s decision making process makes producers feel unsupported and unable to submit applications that afford them the best chance of success.

[1]The Scottish Arts Council Theatre Touring Strategy 2006-11, pg 3

3:2:4 Creative Scotland project funding for touring

The Open Project Fund was introduced during the year 2014/15 and was fully operational for the full year 2015/16. Figure 1 below presents the data on number and total amount awarded to touring theatre and dance from 2012/13 to 2015/16. The table indicates that while there has been variation there is no overall decline in funding over this period despite the change in funding structures.

Fig 1: Creative Scotland project funding for touring

Year	Number of awards	Total awarded	Average (mean)	Project funding route*
2012/13	27	£1,097,208	£40,637	QP and TFAP
2013/14	39	£1,739,660	£44,607	QP and TFAP
2014/15	32	£1,403,192	£43,850	QP and TFAP, OPF from Nov 2014
2015/16	38	£1,732,630	£45,596	OPF
Grand Total	**136**	**£5,972,690**	**£43,917**	

Source: Creative Scotland funding data.

Notes: OPF was introduced in November 2014. Due to the changes in funding structure one deadline was delayed in this period into 2015/16 financial year. Which accounts for the low number of awards during this year.

* QP – Quality Production; TFAP – Touring, Festivals and Arts Programming; OPF – Open Project Fund.

3:2:5 The unfathomable money-go-round of subsidy

The current funding system is regarded by focus group participants as overly complex, seemingly un-strategic and opaque. Evolving deal making, multiple funding channels and the increased commercialisation of the relationship between producer and programmers obscures the picture of how funding is working. Subsidy and cross-subsidy flow amongst and between numerous parties with no systemic understanding of its movement or efficacy.

- Producers believe venues funded to take touring work are not satisfactorily programming or investing in it because they don't believe it's the right work for their audiences.
- Producers that are being subsidised to tour, are increasingly bearing the brunt of the risk, squeezed from both sides (funders and programmers), and operating in increased precarity.
- The financial model of programmers supporting a diverse programme of work by internally subsidising risk is in decline. Programmers are increasingly required to financially break even on productions so they are unable, even with Creative Scotland funding, to underwrite any financial risks in the programme. The subsequent rise in a more commercial approach to programming is regarded variously as pernicious, pragmatic and 'the future'.

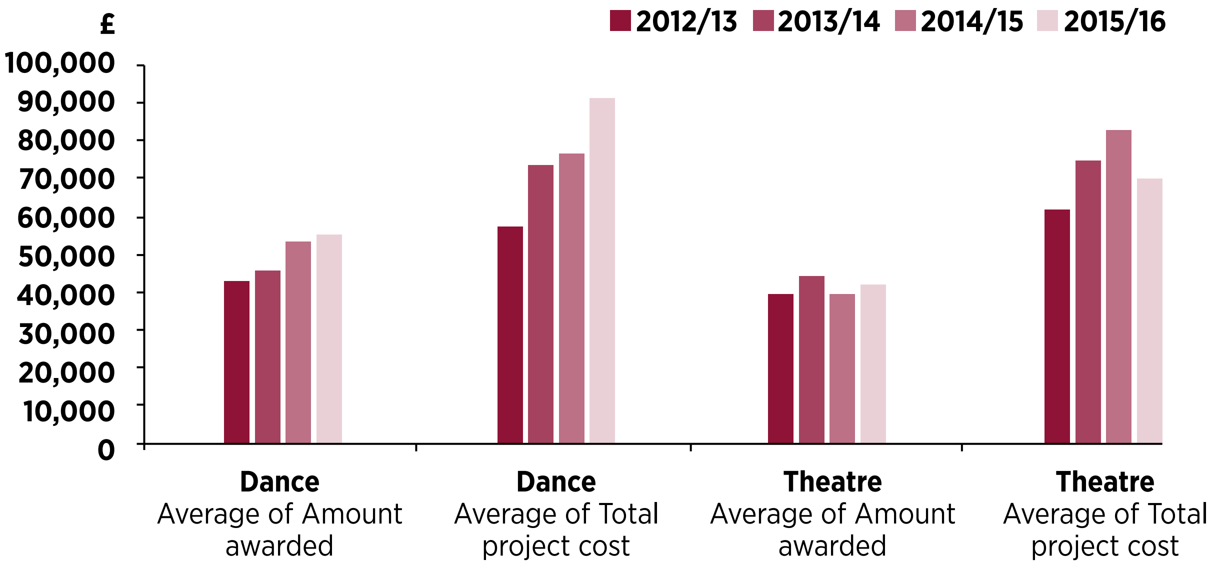
3:2:6 The role of public funding in the financial model for touring

The analysis of Creative Scotland funding data revealed that on average applicants were awarded 59% of total project costs - highlighting the central role Creative Scotland funding plays in the touring ecosystem. However, comparing average project costs with average amount awarded there is a clear indication that funding is not keeping pace with the rising project costs.

Figure 2 below details the average amount awarded compared to the average project costs for each year, broken down by theatre and dance.

For theatre, the average projected costs increased by 34% from £60,728 in 2012/13 to £81,406 in 2014/15. However, they reduced slightly in 2015/16 to £73,845. During this period, average award size has remained relatively static between £40k and £45k and has not kept pace with the increase in projected costs. While it is not possible from top line budgets to determine the reasons for project cost variance, taking into account that inflationary and cost pressures have not reduced over this time the lowering of projected costs in 2015/16 may be indicative of applicants reducing the size and reach of tours in response to the perceived funding available. For dance the data appears to show a steadier relationship between funding and project costs, both growing year on year and dance applications on average receiving more support than theatre. However, given the far smaller number of dance awards (around 10 a year) it is not possible to draw robust conclusions on trends from the data.

Fig 2: Average amount of funds awarded by Creative Scotland compared to average projected project cost for both theatre and dance.



3:2:7 Alternative funding models

The centrality of the role of public funding is a key characteristic of the sector and a strong view was put forward by one participant that an over-reliance on funding inhibits an entrepreneurial mindset and creates an expectation that risk must be wholly supported through subsidy. This leads to a distortion in the market-place where too much work is being supported that cannot attract audiences.

A number of possibilities for other models of working that move away from reliance on public funding were suggested in the focus groups. These include:

- opportunities for subsidised and commercial theatre to work together, with models based on return on investment, and further exploitation of successful work,
- opportunities to explore financial models such as loans and borrowing,
- consortium working models,
- increased support from charitable trusts.

Commercial and subsidised working together: For theatre, there seems to be scope for more commercially supported work and funding models based on return on investment, with opportunities for subsidised and commercial theatre to work together, similar to successful West End transfers. There is no published evidence of these models being tested in Scotland, outside of anecdotal accounts from The National Theatre of Scotland.

In his Commercial Theatre Report, 2012, John Stalker examined commercial ways of funding theatre touring in Scotland, recommending an Investment Club model to deliver a ladder of opportunity to encourage investors, and encouragement of the creation of an EIS (Enterprise Investment Scheme) based investment fund in Scotland. There have been no published reports on any outcomes of his recommendations.

In Graham Devlin and Alan Dix's report Theatre Touring in the 21st Century – An Exploration of New Financial Models, 2015, they suggested different financial models for supporting touring including:

- loans to support cash flow,
- an agency investing for profit and re-investment,
- borrowing from endowments or reserves where repayment is guaranteed,
- the use of Theatre Tax Relief.

Claiming **Theatre Tax Relief** is coming into more common practice in Scotland, but at time of writing there has not been any analysis of its impact.

Consortium working: This allows for wide collaborative working between organisations, not just between artistic directors and programmers choosing and discussing work, but right through their organisations' marketing and technical departments. Collectively they:

- have buying and commissioning power with pooled financial resources,
- share benefits through cost sharing,
- amplify marketing and audience development activities across their network.

Denmark's Touring Network consortium has enough funding to offer full recovery fees to producers which in turn enables them to book sustainable tours, described by one UK participant as the *"most secure tour we've ever done"*.

Charitable Trusts funding touring consortia: Looking across the UK at how tours are supported, there are opportunities to source additional external funds to address lack of provision or access to arts activity. Where there is a lack of local provision a case can be made to charitable trusts to address this deprivation. The Farnham Maltings Greenhouse Programme and Battersea Arts Centre's Collaborative Touring Network both receive substantial support from trusts.

3:2:8 The picture across the UK

All four of the UK's arts funding bodies support performance to tour, in order to reach audiences and spread opportunities to see work. In Northern Ireland, Scotland, Wales and England, support is available through long-term organisational funds or short project funds on a tour-by-tour basis.

Arts Council England and Arts Council Wales also have separate, ring-fenced touring funds that provide clear priorities and objectives for touring work. Arts Council Wales' touring fund is focused exclusively on getting large scale work to travel to all areas of Wales. Arts Council England's Strategic Touring Fund has a range of priorities including geographic reach, access, and relationship building. This supports bringing great art and culture to everyone, particularly those outside London or who haven't taken part before. Touring that does not fully meet these criteria can be supported through the ACE open fund Grants for the Arts.

3:2:9 Data and Survey Analysis - Funding for touring in Scotland

Below is a summary of key findings from the focus groups and corresponding analysis from the data and survey results.

Industry Perspective	Data Analysis and Survey Results
The Open Project Fund is oversubscribed.	Creative Scotland received 1,857 eligible applications to Open Project Funding between 1 April 2015 and 31 March 2016 and made 567 awards.[2] The overall success rates was 31%. The success rate for over £15k (the route for the majority of touring applications) was 43%. In the same period the success rate for touring theatre applications was 49%.
Creative Scotland prioritises high volume, low value awards.	Across all art forms, 2015/16 Open Project Funds supported 567 projects with an average award of £20,660[3]. The average award for touring projects in the same year was £45,596. The number of awards and average amount awarded has remained around the same level during this period and has not seen any significant variance with the introduction of the Open Project Fund.
Creative Scotland does not operate from an informed understanding of the rising costs around touring.	Average projected costs increased from £60,728 in 2012/13 to £81,406 in 2014/15. However they reduced in 2015/16 to £73,845. During this period average award size has remained relatively static and not kept pace with the increase in projected costs. Taking into account that inflationary and cost pressures have not reduced over this time the lowering of projected costs in 2015/16 may be indicative of applicants reducing the size and reach of tours in response to the perceived funding available.
Companies feel pressurised into cutting their budgets to unsustainable levels.	Of the 133 project grants where data is available between 2012-2016: • 79 (59%) of applications received 100% of what they requested. • 98 (74%) received at least 90% of the amount requested. • 26 (20%) received between 71% and 89% of the amount requested. • 9 (7%) received less than 70% of their requested amount Overall 93% of the amount requested was awarded across all years 2012/13 to 2015/16. £6,395,201 was requested by successful applicants, and £5,972,690 awarded.
Some companies ask for more than they need in expectation of the above. Conversely, some companies have asked for less than they need to increase their chances of obtaining funding.	There is little variation between the projected costs and reported final costs through End of Project Monitoring Forms so it is not possible to deduce if this is the case. There was a drop-in success rates for applications in 2014/15, to 34%, which may have induced caution in subsequent applications for 2015/16 to show reduced projected project costs.
The perceived low level of funding provided has negative impacts in relation to ambition, production values, employment, pay, health and well-being.	64% of productions reported in the sector survey had a cast of 4 or less. The length of tours is changing. Between 2012 – 2016 the average number of performances over a tour have dropped from approx. 25 to 13 for theatre, whilst dance has increased from approx. 11 to 19. (although the number of shows for dance are so low that it is more difficult to conclusively identify trends).

[2]**Source: Creative Scotland Annual Review of performance 2015/16, pp 21**
[3]This includes both funding streams – Under £15,000 and over £15,000

There is a frontloading of investment in developing work which may not go on to tour or tour extensively.	Combining both theatre and dance data suggests that tours are relatively short averaging 17.3 performances overall and has seen a decline over the years from 22.3 in 2012/13 to 15 in 2015/16 (it is worth noting that these tour length figures are positively skewed across all years by long run productions in the Edinburgh Fringe and school tours.)
Companies do not receive repeat funding to continue their work. **Not enough is invested in giving successful work a second life to reach more audiences.**	103 companies were supported to tour 2012-2016 through Open Project Funds and its predecessor funds. Of those, 22 received funding to tour more than once (21%). This indicates companies are not being supported regularly. In addition, the vast majority of work supported was 'new work' accounting for 75% of theatre productions and 94% of dance productions supported.
Touring has become focused on the short-term at the expense of long-term planning and development.	76% of productions performed only once per venue visit. Average performances per tour is in decline.

Key Data Findings:

- Overall, the Open Project Fund is oversubscribed, with approximately a third of applications receiving funding. However, total funding awarded to dance and theatre touring since the introduction of the open fund has not decreased.
- While Project funds awarded have increased slightly over time, they have not kept pace with increasing projected project costs, which means that Creative Scotland are funding proportionately less. This data set does not tell us how companies are finding funds elsewhere to support their work, as final project costs continue to rise.
- While 59% of successful applications received what they requested, a significant minority are receiving less, though of these the vast majority get at least 90% of what they requested. The feedback through the focus groups suggests that applicants are attempting to second guess the application system either by requesting more than they require, scaling back or requesting less in the hope that this will be more successful.
- It is not possible to fully gauge whether companies are asking for more or for less than they need. Applicants almost always present a balanced budget in application and the final project costs submitted through End of Project monitoring forms (EOPMs) show little variance from the original projected budgets. Some reported that they had to resubmit applications with reduced budgets before achieving success and while analysis has shown evidence of applicants re-applying it has not been possible to fully interrogate the budgets.
- The number of performances in an average tour is dropping, and the number in the cast is usually less than four, suggesting a lowering of opportunities at scale and corresponding employment opportunities.
- The data suggests that companies do not receive repeat funding to tour, just 21% of producers were funded to tour more than once by project funds between 2012 - 2016. Although some may have gone on to become a Regularly Funded Organisation, and others may have reconfigured under a new name.
- This data suggests a significant number of first time tours and new companies, along with the one night nature of the tours, indicate that they don't have the time to spend in venues - beyond the busy fit-up, performance and get-out schedule.

Product

3:3:1 Programmers unable to strike a balance in an imbalanced sector

Programmers are finding it increasingly challenging to maintain a diverse and balanced programme. They believe Creative Scotland has an implicit funding priority to support lower cost, small scale and riskier work, dance in particular, at the expense of middle-scale mainstream touring which they believe there is unmet demand for. According to the programmers, the scarcity of middle scale work limits their capacity to internally subside risk because of its negative impact on box office income.

An alternative view put forward is that programmers are not sufficiently supporting risk in favour of a more commercial approach to programming. The lack of a funding strategy to ensure diverse programming was considered a contributory factor.

3:3:2 Dance divides opinion

The subject of dance touring proved contentious during the qualitative research sessions with programmers.

On the one hand, the view of some programmers is that there is too much dance product being supported for the available market and the proliferation of new, relatively inexperienced companies being supported by Creative Scotland has resulted in work that is not of a sufficiently high standard.

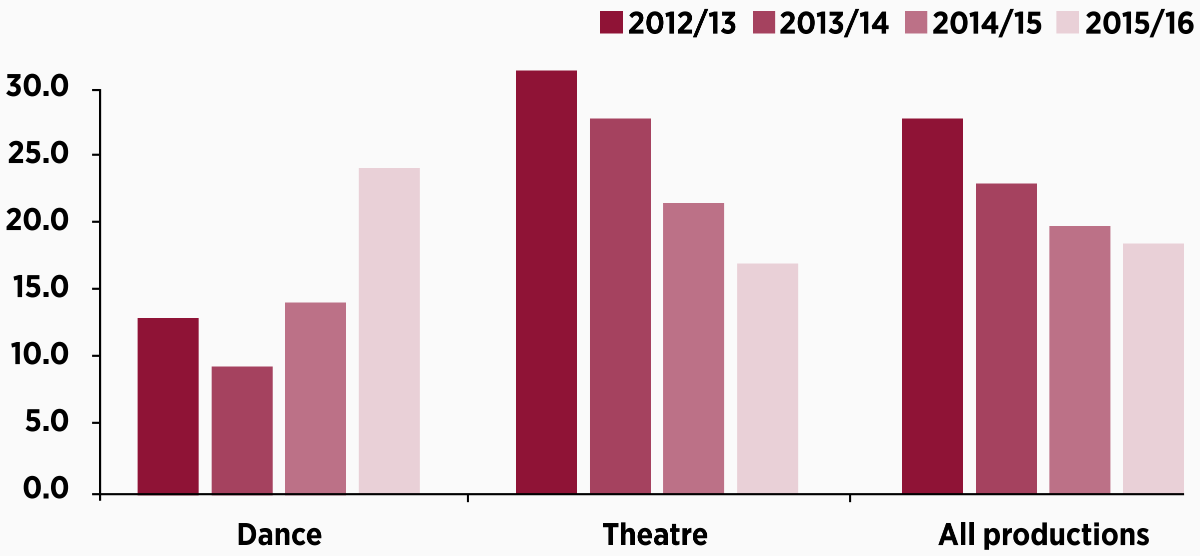
On the other hand, there was frustration from some dance producers that programmers can operate from a poor understanding of the form, lack knowledge around how to develop audiences for dance and are unwilling to book more than one or two dance events per season/year. Impacts include reduced capacity for dance touring, unrealised audience development, and dance programming that does not represent the breadth of dance that is being produced in Scotland.

Creative Scotland regard dance as a burgeoning sector which is attracting increasing interest internationally, and across Scotland in schools and community spaces. As such it is an art form that has an important role to play in helping to extend reach and engagement to a broad audience demographic. Whilst the national picture of venue programming remains relatively irregular and unevenly distributed.

Throughout the four years of analysis a total of 34 dance productions were supported to tour, averaging less than 10 per year. This is less than the number of theatre productions, 102, averaging 25 per year. This means that dance productions constitute 25% of the total number of dance/theatre productions (136) supported to tour.

The data relating to project funding indicates that the average number of performances has declined over the last four years for ‘all productions’ and ‘theatre’. However, the number of dance performances have increased, though within a less consistent picture. With far fewer productions per year than theatre it is more difficult to identify trends, although significantly, the number of average dance performances per production have nearly doubled between 2012/13 and 2015/16.

Fig 3: Average number of performances per production by year 2012/13 – 2015/16



Source: Strand One: Data analysis of Creative Scotland Funded touring 2012 – 2016.

The data picture for dance audience attendance is variable, and difficult to compare due to differing measures used.

Culture Republic's data for dance and ballet audiences 2012/13 – 2015/16 shows a different, still variable pattern for dance attendance with a decrease in 2015/16. This data is taken directly from venue box offices, and is not related solely to Creative Scotland funded work.

Fig 4: Dance attendance in Scotland

	Bookers	Tickets	Revenue	Performances	Average Number of Tickets per Performance	Average Revenue per Performance
FY12/13	78,344	254,500	£4,655,215	1,246	204	£3,736
FY13/14	64,915	214,856	£3,706,916	1,300	165	£2,851
FY14/15	96,600	299,562	£5,493,978	1,371	218	£4,007
FY15/16	83,486	259,652	£5,408,925	1,250	208	£4,327

Source: Culture Republic 2016, Report for Creative Scotland.

The Scottish Household Survey 2015 (see Fig. 5) indicates an increase in both dance and theatre attendance over the last four years, with 34% of respondents stating they attended a theatre performance in 2015 and 12% attending a dance performance.

Fig 5: Attendance at cultural events and visiting places of culture in the last 12 months

Adults	2012	2013	2014	2015
Theatre - e.g. pantomime/play	31	32	33	34
Dance show/event - inc. ballet	9	10	11	12

Source: Scottish Household Survey, 2015, Scottish Government.

3:3:3 Examples of strategic support for dance touring

UK Audiences for dance are being strategically targeted for development, with support from the strategic touring funds available from Arts Council Wales and Arts Council England.

Wales Dance Consortium: a development initiative to increase the quality of dance production and presentation in theatres and arts centres across Wales, with over 45 member theatres. They are currently engaged in an extensive, three-year period of development funded by the Arts Council of Wales, focusing on four elements Children and Families; International-Presenting Work from outside Wales; Marketing and Audience Development; and Dance Buddy: a programme that pairs up independent dance artists with a theatre or arts centre in co-mentoring partnership – the ultimate aim being an increase in the quantity and quality of Wales-made work available for audiences.

The National Rural Touring Forum: represents a number of mainly rural touring schemes and rural arts development agencies across the UK, that aim to help local people to promote high quality arts events and experiences in rural and other community venues. They have secured Strategic Touring Funds from Arts Council England to run the Rural Touring Dance Initiative which addresses the lack of dance programmed by their members by showcasing work, offering supported bursaries to pay performance fees and offering marketing and audience development support.

3:3:4 Data Analysis - Supply and Demand

Industry Perspective	Data Analysis and Survey Results
Small-scale, riskier work is prioritised over larger-scale more mainstream companies.	The data from Creative Scotland on project funded productions, shows that 7% of productions were large scale, 48% were mid-scale and 42% small scale between 2012 – 2016. In that time, funded productions toured to a total of 420 unique venues, 41% of which were micro scale (less than 100 seats).
The majority of work that is toured is new work.	New work accounts for the vast majority of work supported to tour in Scotland through the project funds OPF, TFAP and QP 2012-2016. 75% of Theatre productions and 94% of Dance productions were new work. New work (for both theatre and dance) was the most common genre of work cited by survey respondents when asked about their recent productions. 60% of those recent productions were new work. This is likely to be an under estimate as much of the work tagged as ‘other’ (19% of the sample) is also new work.
There is an over-supply of small scale touring and dance.	This issue came through strongly in both the focus groups and the online survey. 64% of the productions cited by the survey respondents had a cast size of four or less. Only 34 Dance productions were supported to tour between 2012 and 2016 averaging less than 10 per year. Creative Scotland Funded productions, 2012-16, toured to a total of 420 unique venues, 41% of which were micro scale (less than 100 seats), which is proportionately high when compared to small (14%) medium (15%), large (7%) or unknown – outdoor or site specific. (23%).
There is an under-supply of mainstream middle to large-scale work.	This issue came through strongly in both the focus groups and the online survey.

Key Data Findings

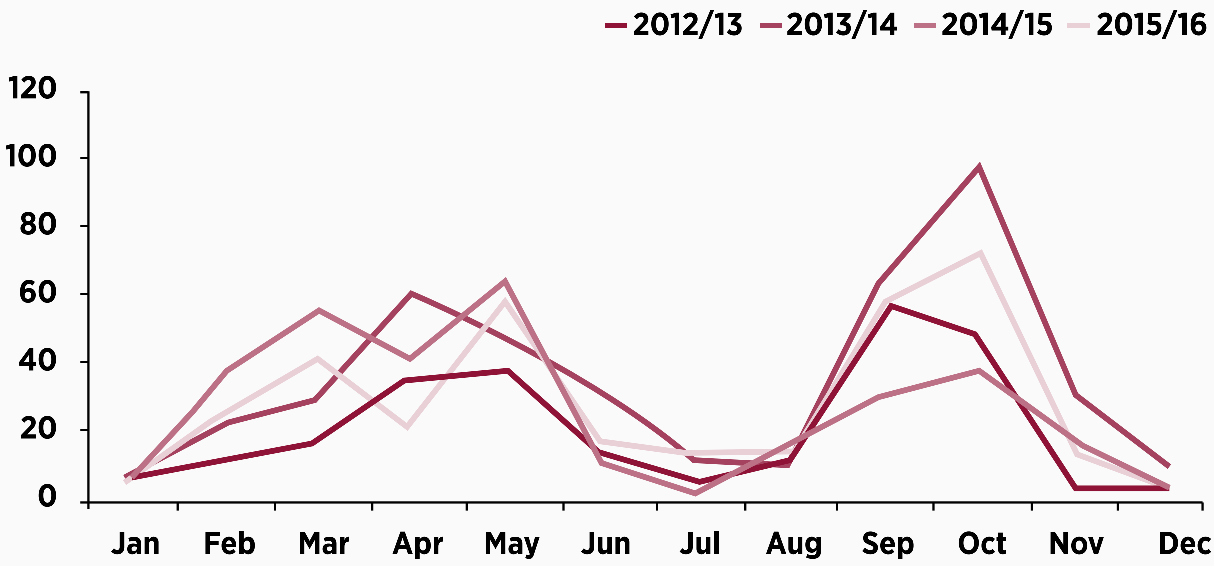
- The data would seem to support the industry perspective that small-scale, new work is predominant as the vast majority of work supported is new work.
- A large proportion of venues toured into are micro venues (100 seats or less). This is particularly the case in more rural Local Authority areas. There is no current comprehensive data set on venue sizes and scales and many modern venues are adaptable to this scale of the production.
- The feedback from the larger and mid-scale venues through both the survey and the focus groups highlights a frustration in securing mid-scale work.
- There is a correlation of opinion between the focus groups and sector survey that supports the perception of an undersupply of mid/large scale work, but no qualitative data to support this view.
- We don't know if larger scale or mid-scale producers are applying for funding. Analysis of unsuccessful applications shows the average requests refused amount to less than the average amount awarded, which could suggest smaller scale projects. There is no clear evidence that large and mid-scale work is being specifically discriminated against. However, it is possible that producers feel discouraged from applying for this scale of work. Similarly, we have no data on whether any non-new work is applying.

The Touring Environment

3:4:1 The challenges of tour booking and programming

- **Feast and famine:** there are two main touring windows created by the Edinburgh Fringe and Christmas Season which creates bottlenecks where companies are competing within a condensed period of time and prevents programmers from maintaining a consistent year-round programme of work.

Fig 6: Calendar of start of tour dates for touring activity supported through project funds from 2012/13 through to 2015/16



Source: Strand One: Data analysis of Creative Scotland Funded touring 2012 – 2016.

- **Challenges around scheduling:** the rolling nature of the Open Project Fund has disrupted planning timelines and introduced a high degree of uncertainty into the system as both programmers and producers await the outcome of the funding awards.

- **Precarity of the verbal agreement:** the practice of 'penciling in', rather than bringing a degree of certainty and trust to the tour booking process is, where programmers are using it as a to serve their own purposes, achieving the opposite.

- **The revolving address book:** there is demand for a centrally managed, authoritative and up-to-date resource to streamline the tour booking and programming process in what is a complex and rapidly evolving sector.

3:4:2 The increased commercialisation of the touring relationship in Scotland

There has been a shift in the way tours are underwritten due to the increasing financial pressures programmers face and the concomitant need to negotiate tougher deals and recoup some of their costs through contras.

- **Shifts in deal making:** programmers are, through financial necessity, striking harder deals for work that is small-scale or risky. Described by producers as a rise in 'market forces', this shift is having a disproportionate effect on their ability to tour as they increasingly bear the financial brunt of the risk.

- **Internal subsidy at risk:** the financial model of programmers supporting a diverse programme by internally subsidising risk is vulnerable to increasing financial pressures and a balance of supply that favours 'riskier work'.

- **Local Authorities and Cultural Trusts:** on-going budget cuts and shifting priorities means producers are experiencing the sharp end of a more commercial mind-set and resistance to riskier work, which was described as an 'erosion of artistic integrity'. Between 2010/11 and 2014/15, overall spending by Local Authorities on "other cultural and heritage services" (which includes Archives, Arts Development and Support, Heritage and Theatres and Public Entertainment) had a 20% reduction[4]. This leaves the Cultural Trusts tasked with delivering provision with reduced budgets which affects their ability to programme work.

- **Programmers are charging for more:** programmers are increasingly charging for services, such as technical support and marketing contras, that used to be free. Whereas programmers regard this as a growing financial necessity, producers are unhappy about increasingly bearing the brunt of the costs.

- **Sector Survey results:** The industry survey highlighted who the sector feels are responsible for which costs and who normally pays for those costs.

    - Production Companies are largely seen as being responsible for provision and meeting costs of production development (materials, rehearsal time and space).

    - Audience development is more mixed picture with promoters taking more responsibility for the provision of audience development, marketing and accessibility costs and producing companies taking responsibility for the organisation and costs of workshops.

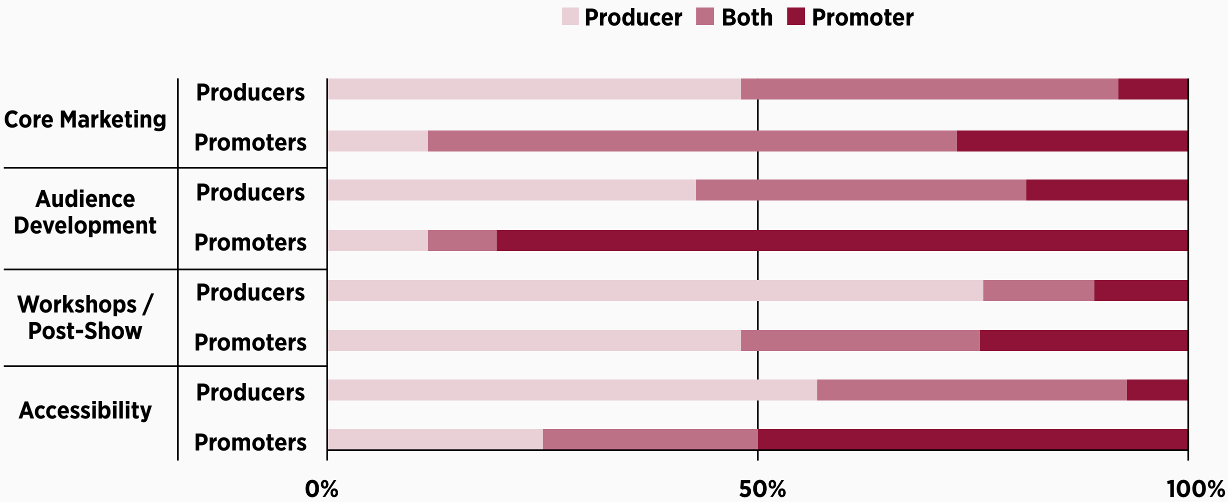
    - Production Staging is more of a shared responsibility with the get in and get out crews and technical being provided by both producer and promoter – however producers were more likely to be meeting the costs. Producer companies were almost always seen as responsible for the provision and costs of accommodation and transport.

    - There was significant variation between producers and promoters view of who took responsibility for the provision and costs of these core functions. With producers stating that they mostly provided and met the costs of all functions.

The data table below shows the divergence with regards who is perceived to meet costs for Accessibility and Workshops as well as Audience Development and Core Marketing.

[4]EKOS, Culture and Leisure Services in Scottish Local Authorities, February 2014, page 6

Fig 7: Sector survey responses



Generally in your experience who meets the costs of the following? %			
Accessibility	Producer pays	Both pay	Promoter pays
Promoters	25	25	50
Producers	57	36	7
Workshops/post show	Producer pays	Both pay	Promoter pays
Promoters	48	28	24
Producers	77	13	11
Audience Development	Producer pays	Both pay	Promoter pays
Promoters	12	8	81
Producers	43	38	19
Core Marketing	Producer pays	Both pay	Promoter pays
Promoters	12	62	27
Producers	48	44	8

Source: Strand 2: Industry survey of producers and Promoters.

3:4:3 The dimensions of touring

- **Length of tour:** producers believe that tours are getting shorter because lean funding, increased costs and deals that result in unreliable income can often mean they do not have the margins available to fund tour extensions. The length of tours has shortened by 40% between 2012 and 2016.

- **Distribution:** programmers believe there is a concentration of small-scale companies in the central belt producing new and riskier work, who do not tour widely. This was variously attributed to the perceived difficulties of the time, cost and distance involved in rural touring; a perception that rural touring is not prestigious enough; and a preference for making work over the sharing of it. Rural promoters believe this has contributed to the difficulties they encounter in attracting a varied programme to their area.

- **Concentration:** producers are frustrated at the rise of single night bookings, usually on a Thursday, Friday or Saturday night. This creates hidden costs around empty days, limiting the duration and reach of the tours and precluding the opportunity of word of mouth to build audiences.

- **Efficiency:** some producers were concerned that their tours have become less cost and carbon efficient. The disruption in timelines since the establishment of Open Project Funding, together with some programmers not honouring their pencil agreements, limits producers' ability to secure well-routed tours.

3:4:4 A regional overview of Scottish touring

Touring in Scotland is supported through local touring networks, through showcasing opportunities and into schools through the new Theatre in Schools Touring Initiative.

Touring Networks: Where they exist, there are excellent touring networks which support touring: Dumfries and Galloway Arts Festival in the South West, Borders Live in the South East, Rural Nations in the Outer Hebrides, North East Arts Touring (NEAT) in the North East, and the Touring Network across the Highlands and Islands. They have similar aims:

- to bring work to their locality and to audiences who wouldn't otherwise have access,
- co-ordinate touring across geographical areas,
- to support local promoters to book more adventurous and diverse programming, by paying some of the artist's fees through supported touring programmes, thus reducing the financial risk to local promoters who are often involved in the selection processes, or are offered a 'menu' of productions to choose from.

At least one producer survey respondent reported that the Touring Network system was ineffective and increased the difficulty of direct communication and reduced the number of rural venues booked.

Variations do exist across the networks in terms of fees paid to performers, the box office splits with local promoters, and differing timescales to book work.

Gaps in network coverage: Across the Central Belt (beyond Glasgow Arts Community touring) and in Fife, there are no formal support networks.

Precarity: There is a precariousness in the rural touring support structures. The Touring Network and NEAT both receive Regular Funding from Creative Scotland. However, others are supported through Open Project Funds, on a project-by-project basis so coordinators can discontinue the network at any time, leaving local promoters without support.

Showcase opportunities: The Federation of Scottish Theatre host an annual Emporium, which includes an early dialogue day for productions in the early stages of development, and a marketplace day for productions ready to tour. The Touring Network host a Spring Gathering, with selected productions given slots to perform excerpts, and other opportunities for wider promoter and producer networking. Festivals also offer an opportunity to show and showcase work in Scotland, particularly Edinburgh Festival Fringe, Imaginate, Manipulate, and Edinburgh International Festival.

Theatre in Schools Touring: Imaginate's Theatre in Schools Scotland supports and develops the provision of theatre in Scotland's schools, with the ultimate aim of ensuring that every child in Scotland receives - at their nursery or school - a minimum of one performing arts production per year as a core part of their education. This provides a touring opportunity for work for young people.

3:4:5 Examples of alternative touring models

As an alternative to one night stands or short runs, models of deeper local connection and engagement are in evidence in the UK and Australia,

Companies in Residence: Farnham Malting's Greenhouse, Battersea Arts Centre's Collaborative Touring Network and Creu Cymru's Dance Buddy all have elements of companies in residence. They create work with local audiences, and then tour it or spend time in a locality in the week leading up to performance, delivering workshops and skill sharing.

Slow touring with local engagement: Australia's call for slow touring and deeper engagement with local communities has led to some successful experiments in audience development. Spending time in a town and working with groups to explore the themes of the performance beforehand, really engaged the audience for Shiver. Whilst the tour was contemporary dance, the workshops were not exclusively so, focusing on the thematiCreative Scotland of the work, loss, to create authentic points of resonance between audience and art irrespective of form.

3:4:6 National Theatre of Scotland (NTS) is operating independently of the touring sector

Funded directly by the government and fulfilling a separate set of criteria to touring, programmers in particular believe NTS is operating more in competition with them than working alongside them to build audiences as part of an integrated approach.

3:4:7 Insufficient training and progression routes

Producers discussed the lack of good quality training provision for technical staff. Opportunities for progression are limited due to the declining number of small-scale companies able to afford technicians. Another view put forward was that NTS is 'hoovering up' the talent and 'fast-tracking' them to the mid-scale, meaning many young tech professionals are not cutting their teeth on small-scale and rural touring. From an artist perspective, theatres may be cautious about releasing staff time and resource to support artist development whilst a reliance on project-funding does not provide the continuity of resource to invest in professional development.

3:4:8 Data analysis – touring patterns and distribution

Industry Perspective	Data Analysis and Survey Results
Tours are getting shorter.	Between 2012/13 and 2015/16 the number of performances per tour, when looking at both theatre and dance combined, has decreased from an average of 25 to 13.
There is a concentration of small scale companies in the central belt.	60% of the producing theatre and dance companies who were project funded by Creative Scotland to tour were based in Edinburgh (29%) or Glasgow (31%). This broadly similar for both Dance (62% of grants) and Theatre (59% of grants).
These small companies do not tour widely.	Productions project funded between 2012 - 2016 were performed in all of Scotland's 32 Local Authorities. Edinburgh, Glasgow and Highland are most provisioned, collectively accounting for 29% of all venues, 30% of all productions and 43% of all performances. The least visited areas for the most part sit close to Edinburgh and Glasgow across the central belt - Clackmannanshire, East Ayrshire, East Dumbartonshire, Midlothian, North Lanarkshire and West Dumbartonshire. Some remote and island communities, such as Shetland, Islay and Kintyre, receive very few productions.
There is a concentration of bookings on Thu, Fri and Sat evenings.	41% of the tours funded by Open Project Funds, between 2012 - 2016 started their runs in venues on a Friday or Saturday night. In 2015/16, tours by Regularly Funded Organisations showed that Saturday is the most common performance day. Where there was only one performance in a venue for those RFO tours, 50% of performances were either on a Friday or Saturday night.
There is a rise in one night stands.	Around three quarters of all programming is one night only. 76% of all venues toured to by project funded productions hosted only one performance per production. (average across all years). 70% of all venues toured to by Creative Scotland funded productions (OPF and RFO) in 2015/16 hosted only one performance per production.
Tours are less cost and carbon efficient.	There is no requirement currently for organisations to submit carbon footprint data for project funded tours.

Key Data Findings

- There is a concentration of producing companies in Edinburgh and Glasgow.
- While touring work has a wider reach beyond the cities, Glasgow and Edinburgh are still the most toured to areas. However, across the central corridor work is sticking to Glasgow and Edinburgh which suggests that companies do not tour widely close to home and highly populated suburban central belt areas are underserved.
- The Highlands and Islands are regular receivers of work, which suggests the active networks for promoters is supporting that circuit.
- Whilst there is no trend analysis to confirm a rise in one-night stands, the incidence of one night stands are high. Similarly, the nights of the week when performances happen are concentrated at weekends. 41% of tours started their run-in venues on a Friday or Saturday night. This combined with the fact that 76% of venues only hosted one performance per production indicates a strong weekend bias.
- There is no data on the cost and carbon efficiency of tours, but the funding structure and subsequent booking process does not allow companies to prioritise carbon efficiency. RFOs are asked to report their carbon data but this is not specifically for touring and there is no requirement (therefore incentive) to manage tours more efficiently.

3.5 Key Relationships

3:5:1 A sector operating at its limits is impacting on relationships

- Producers and programmers are frustrated that they don't have the capacity to invest the time and resource needed to develop informed relationships.
- For programmers, the increasing demands made on the funding they receive, and the lack of time to keep abreast of the influx of new companies supported through the Open Project Fund, means they are not able to engage in as much meaningful dialogue as they would like. Some find themselves programming blind out of necessity.
- As project-funded companies, producers focus their resource on short-term tour booking rather than longer-term relationship building.
- As a result, producers and programmers acknowledged that they can find themselves operating from a limited understanding of each other's priorities, and that the exchanges between them are too often reduced to the transactional requirement of booking a slot and negotiating a deal.

3:5:2 The perceived imbalance of power

Producers believe that an over-supply of small-scale work has resulted in an appreciable shift in the balance of power to the programmers. In their experience, this has been evidenced by:

- an unwillingness to return calls or respond to emails,
- questionable practice around penciling in,
- interactions where programmers can increasingly determine the terms and drive down fees,
- a feeling that much of their contact with programmers is being reduced to a sales pitch rather than a meeting of equals.

These views were affirmed by some of the programmers during the focus groups. The impact on the producers is a sense of being de-valued and, in some cases, a profound loss of trust.

3:5:3 The mutual discomfort of negotiation

Both programmers and producers have experienced a considerable degree of discomfort around negotiating the deal. For programmers this discomfort centres on:

- feeling guilty about the necessity of negotiating fees which, sometimes, are lower than the perceived worth of the work,
- the difficulty of negotiating when each party is operating from a limited understanding of each other's position,
- not having enough time to talk meaningfully about the work,
- having to field uninformed sales pitches.

Producers feel that:

- negotiation is not the informed conversation between equals they believe it ought to be,
- their role has been reduced to that of a sales person,
- they find themselves making sales pitches which they admit can be uninformed.

3:5:4 Producer's relationship with Creative Scotland

Some producers who took part in the research were unhappy with the nature of their relationship with Creative Scotland. Some felt unsupported in relation to their applications to the Open Project Fund; some reported feeling pressurised into reducing the amount of funding they ask for, to levels which they believe are unsustainable and some stated they had tried to work the system by over-budgeting or under-budgeting in their applications to achieve what they thought would be the best possible outcome. All of which indicates an erosion of trust and honesty.

3:6 Audiences

3:6:1 Audiences do not sit at the heart

Whilst the overarching aspiration for everyone taking part in the qualitative research was to build audiences, in reality this is not translating into consistently high quality marketing and audience development practice within the sector.

3:6:2 Venue tour marketing

Programmers admitted that high volume programmes reduce their capacity to provide tailored marketing support across a diverse range of work, leading to marketing that can be generic. Venue marketers are too stretched to take an informed interest in every company visiting the venue, meaning they can operate from a shallow understanding of the work, particularly in relation to one-night visits of small-scale work. Tough decisions have to be made in relation to where spend is best allocated, meaning small-scale work can lose out. Programmers find that there is an expectation from some producers that, once they have supplied the core marketing collateral, all the marketing will be done for them, which is not always possible. In addition, budget and staff reductions at civic venues, together with a perceived de-skilling of marketing practice, dilutes the quality of marketing support for touring work.

Some producers are finding it hard to engage venues in collaborative marketing and believe their work is being de-prioritised in favour of companies with the potential to deliver better return on marketing investment. Incidences where the print and online digital marketing collateral they supplied have been left unused has undermined their confidence in the level of venue marketing support they receive. This perceived lack of investment in their visit has led to some companies questioning the programmer motives behind booking their work at all.

3:6:3 Marketing support from producers

The quality and usefulness of the support different producers offer is determined by the degree of skill and resource they have. Copy can often be written from an artistic perspective which then has to be ‘decoded’ by the venue marketing departments into a language audiences can understand.

3:6:4 Disagreements around sharing audience contact data

Some producers would like to be able to develop relationships directly with audiences and are being met with strong resistance from programmers. Programmers and their marketing departments are unwilling to hand over audience contact data for reasons of data protection and their own perceived self interests.

3:6:5 Good audience insight practice

The Audience Agency have set up **Show Stats**, a digital data tool, which promises to generate reports for touring companies on their audience demographic at venues in England. This will allow for shared language which will allow clearer marketing conversations between touring companies and venues and opportunities to address audience development gaps. It does not allude to email addresses or who ‘owns’ the data.

3:6:6 Audience development and engagement in Scotland

- A luxury rather than a necessity: producers find that audience development is not on the programmer’s agenda unless there is additional resource to support it. This means some small and medium sized companies could find themselves financially exposed, whilst potential new audiences remain untapped.
- Operating from a shallow understanding of the audience and marketplace: programmers admitted they have limited knowledge about their potential audiences and communities. Some also questioned the validity and effectiveness of the audience data they have.
- Operating in silos: Not enough dialogue takes place between producers, programmers and marketing staff to inspire staff teams and develop a shared understanding around the work and audiences, an understanding which could inform more astute marketing and audience development activity.
- Programming as an audience development tool: programmers shared examples of programming around national theme days and events, and creating their own festivals or distinct programming themes within a season, as a means to attract and develop new audiences. Some have committed relationships with specific companies in order to build audiences over time. This was more evident with RFO venues than civic venues and rural promoters.
- One-night stands preclude word of mouth: producers pointed out the contradiction behind venues booking their work to attract audiences to a diverse programme, but then not investing in the opportunity to build audiences by booking them for a single night only.
- Support deeper, more sustained audience engagement: some suggested an increased focus around audience engagement (e.g. socially engaged, participatory, locally contextualised) to establish more meaningful relationships between audience, artists and programmers/ promoters, and to deepen the impact of the work and build new audiences.

3:6:7 Alternative methods of audience development and engagement

The literature review suggested alternative touring practices exist that are designed to slow down touring and/or develop creative and more sustained opportunities for deeper audience engagement at each venue in order to build meaningful connections and new audiences.

In the UK, Fevered Sleep's Future Play research project successfully explored longer runs for young audiences. Farnham Malting's Greenhouse project supports venues and artists to develop deeper relationships with audiences by having an artist in residence create work locally and then tour more widely. Creu Cmyru's Dance Buddy is an artist-in-residence and audience development scheme where choreographers are resident in a venue, and work with them to develop audiences and create new work.

In Australia, Danielle Micich's Western Australian tour of the contemporary dance work Shiver successfully delivered pre-production activity and audience engagement as a marketing tool to deliver larger, more interested audiences who had a deep connection with the work.

3:6:8 Data analysis – key relationships and dance

Industry Perspective	Data Analysis and Survey Results
There is unmet demand for high quality mainstream mid to large-scale work.	7% of project funded 2012-2016 work toured to large-scale venues.
There is a limited market for dance.	This issue came through strongly in both the focus groups and the online survey. The data for dance audiences is inconsistent: According to the Scottish Household Survey 2015, the market is increasing, with attendance at theatre up to 34% in 2015 from 31% in 2012, and dance up to 12% in 2015 from 9%. According to box office data from Culture Republic, dance attendance fell slightly in 2015/16. Meanwhile the number of dance performances per tour is increasing.
The market cannot support programmes that include more new and risky work.	Whilst this issue came through strongly in both the focus groups and the online survey, there is no data evidence available in relation to this.

Key Data Findings

- There is a clear demand from programmers for mainstream mid and large-scale work which is not being met through work produced in Scotland. It is more common for project funded work to tour to small and micro venues for short runs.
- It's unclear whether the market for dance is improving. The data reports that the number of performances per dance tour have been increasing in recent years, but audience attendance data is inconsistent.

Conclusions and Recommendations

The review has surfaced many complex and inter-related issues regarding touring theatre and dance in Scotland. There is no quick fix or single-approach solution. As the recommendations section in the Qualitative Research report (Strand 3) states:

"Given the inevitability of continued reduced funding, rising costs, rapidly evolving cultural behaviour, shifts in the priorities and practices of civic venues, and the need to secure optimal carbon efficiency, there needs to be a comprehensive sector-wide review on how to build a more resilient touring ecosystem.

The answer may not lie in throwing more money at the problem. It certainly cannot be solved by a reactive, incremental approach. What is required is brave, disruptive thinking to re-imagine how touring theatre and dance can survive and thrive in an increasingly challenging environment."

This section does not attempt to unilaterally solve the issues. Rather, it offers a distillation of the key issues with associated recommendations to further thinking, prompt discussion and inform action.

4:1 The Need For A Strategic Focus For Touring	
Context	Touring does not currently benefit from the advantages that come with a shared vision, strategic priorities and clear criteria for success. Bringing dance and theatre touring into Open Project Funding and its non-artform specific predecessors has resulted in the loss of the strategic focus that was evident in the SAC Theatre Touring Strategy 2006-11. There is no sector space to discuss what success in touring looks like and to share practice.
Recommendations	The sector and Creative Scotland work together to articulate a shared vision for touring that galvanises everyone around shared purpose, priorities and a common language. Establish a strategic framework for touring. Establish a touring fund driven by a renewed vision and clear strategic priorities around artistic quality, audience development, reach, balance of genre and scale, depth of engagement, efficiency, sustainability, continuity and progression. Introduce protocols to safeguard RFO commitment to a balanced, diverse programme of work. Seek ways to align national, RFO and project funded companies around the shared goal of developing audiences for Scottish work in a way that is mutually beneficial and advances the touring infrastructure. Ensure proven high quality work is given an extended life to reach more audiences.
Supporting Information	Strand 4: Section 4.2.1, Scottish Arts Council Theatre Touring Strategy Section 3.2, Arts Council England, Strategic Touring Fund.

4:2 An Active Sector in Need of Sustained Support	
Context	Whilst touring in Scotland is very active, deep-rooted issues exist which prevent it from flourishing. Producers find that project funding supports short-term activity at the expense of long-term development. The low incidence of repeat funding inhibits artistic development, progression and continuity. Funding has not increased in line with costs and cast sizes are small. Companies which are not getting what they asked for have to cut their cloth to fit which may result in a thwarting of artistic ambition. Financially squeezed producers are sending out shorter tours, which are small in scale. Similarly, venues and promoters are experiencing increasing budget pressures, are seen as becoming increasingly risk-averse and are programming fewer performances. These factors combined are impacting on continuity of provision, strategic relationship building and sustained audience development.
Recommendations	Longer-term funding agreements for touring companies. A dedicated funding stream designed to support creative partnerships (producer and programmer), and/or specific initiatives to underwrite the risk, over a fixed term period to encourage longer-term planning, continuity of provision, strategic relationship building and sustained audience development.
Supporting Information	Strand 4: Section 5.2: Strategically Supported Touring Initiatives.

4:3 Deteriorating Professional Relationships	
Context	There is compelling qualitative evidence that professional relationships within the sector are in a state of decline. Producers and programmers believe that the prevailing culture of doing 'more for less' or 'more for the same' reduces the capacity for relationships to flourish. Instead, they have experienced frustration, guilt and discomfort in their relations with each other and described scenarios where there has been a lack of honesty and mutual understanding. An absence of professional courtesies such as returning calls and honouring 'pencils', have given rise to claims of programmer power-play, leaving some producers feeling de-valued and unsupported. Programmers and producers question how Creative Scotland makes its funding decisions, possibly as a result of the opacity of the decision-making process and absence of transparent priorities. In addition, some producers questioned Creative Scotland's understanding of the true costs of touring and attribute issues around pay, health and well-being to being chronically under-resourced to tour.
Recommendations	Create opportunities for dialogue and exchange to address the limited understanding of each other's priorities and invite more openness and sharing of different programming systems. Establish regular seasonal showcases of new work to develop programmers' knowledge of the creative marketplace, seed constructive conversations between them and artists about the right product for their venues, and where producers, promoters and marketers can meet to share/discuss works-in-progress, deepen mutual understanding and build relationships. Establish clear priorities and guidelines in relation to the different stages of developing a tour (R&D, Development, Production) which allows for better forward planning between producers and programmers. Consider working together as a sector to establish an accord around best, and most ethical, practice.
Supporting Information	Strand 4: Section 6.3: A variety of ways for companies to pitch work.

4:4 Tour Booking and Programming are Unnecessarily Difficult	
Context	The rolling nature of the Open Project Fund is seen by some as disrupting what convergence there was between funding announcements and deadlines for programmers. The touring networks and venue programmers all work to differing timescales when planning. The deadlines for participation in touring programmes and cut off points for venue programmes are all varied, making it difficult to coordinate tour dates, or to be clear about when to approach whom. The uncertainties involved in securing funding through project funding presents significant challenges tour booking and programming. Touring costs and fee structures are a grey area which can make negotiating deals challenging on both sides. Both producers and promoters appear to operate from a limited understanding of each other's priorities which undermines their ability to speak a common language and work towards shared objectives. The current difficulties around tour booking may have resulted in inefficiencies around the costs and carbon footprint of the tour route.
Recommendations	Explore the viability of establishing more aligned programmer planning cycles, and include funding cycles in the consideration. Establish a touring fund with transparent funding mechanisms, longer lead-ins, clear guidance of what is expected, and allows for better forward planning. Support a centrally managed national resource (which could be Tourbook) that aids communication between producers and programmers. Initiate a benchmarking exercise to establish clear, evidence-based expectations around the costs of touring, pay rates, fee structures and anticipated audiences in relation to genre and scale. Establish regular showcases where producers and programmers can meet to share/discuss works-in-progress, deepen mutual understanding, build relationships and share working practices. Form regional/national touring consortia which would collaborate on establishing efficient touring 'highways' that producers can tap into.
Supporting Information	Strand 4 Section 5.4: Methods venues use to approach programming Section 6.3: A variety of ways for companies to pitch work Section 6.5: Denmark's Touring Network Section 4.1.1: The Touring Network / Tourbook Section 5.1.2: House's tour-finder.org

4:5 There is an Unfathomable Money-Go-Round of Subsidy	
Context	The effectiveness of current subsidy for touring theatre and dance is unclear. Subsidy and cross-subsidy flow amongst and between numerous parties with no systemic understanding of its movement or efficacy. Despite programmers being in receipt of public funds and having a role of supporting work which would not survive in a commercial environment, many are moving away from internally subsiding risk and taking a more commercial approach. Producers feel 'squeezed on both sides' with little increase funding in awards over time, despite rising costs and shifting deal-making. This increases their exposure to risk, reducing the margins required to support tour extensions. At present, it is not possible to track the movement or efficacy of current subsidy. The results of recent reports into alternative financial models appear not to have been acted on.
Recommendations	Commission an in-depth economic review of the movement and effectiveness of current subsidy and examine how it might be better applied. Explore the viability of alternative funding approaches, such as full cost recovery fees, to support risk within an evolving touring and economic landscape. Explore other models of working that could reduce reliance on subsidy and support enhanced sustainability. Encourage relationships with trusts and charitable foundations. Initiate a benchmarking exercise to establish clear, evidence-based expectations around the costs of touring, pay rates and anticipated audiences in relation to genre and scale.
Supporting Information	Strand 4: Section 4.3: Are there other models of working? Section 4.3.4: Charitable Trusts are funding touring consortia Section 6.4: Dancenet, Sweden Section 6.5: Denmark's Touring Network.

4:6 A Confusing Picture Around The Product Pipeline	
Context	Given the absence of strategic priorities for touring, the types of project-funded work touring Scotland appear to be determined more by who successfully applies to the Open Project Fund, touring and non-touring, than by careful consideration in supporting a balanced touring ecosystem across genres and scales. The available data upholds programmer views that the vast majority of work supported is new, small-scale work, though it is not possible to determine evidentially whether this can be regarded as an 'over-supply'. Neither can it be determined whether there is, in reality, an 'under-supply' of mid-scale and large-scale work relative to demand/capacity. The prevailing view from programmers is that the current product pipeline is impairing their ability to create balanced programmes. There are significant differences of opinion around dance in relation to market-demand and supply. The data shows that whilst the number of average productions per year for theatre has been in steady decline, dance almost doubled in the year 2014/15 to 2015/16 (although this still equates to less than 10 productions per year). There are unresolved tensions between dance-makers who believe their work is being de-prioritised by some programmers, and programmers who believe there is an over-supply of dance, which can be of low quality, which the market cannot support. The data around the market for dance is inconclusive, with a small data sample to work from.
Recommendations	Establish a strategic framework for touring. Introduce protocols to safeguard RFO commitment to balanced, diverse programmes of work. Conduct research to uncover the current status of dance and theatre touring with regards audiences, sales trends, capacities and market demand. Following analysis of market and audience data, instigate a strategic programming or audience development initiative around dance.
Supporting Information	Strand 4: Section 5.2.2: Wales Dance Consortium Section 5.2.3: National Rural Touring Forum.

4:7 A Need to Improve Reach and Distribution	
Context	There is a high concentration of small-scale companies based in the urban centres of Edinburgh and Glasgow which may not be representative of the distribution of talent. Postcode mapping and Local Authority analysis of the touring work supported showed a high variance in areas toured to, with Highland, Edinburgh and Glasgow receiving the most productions while suburban central belt areas and some remote and island communities, such as Shetland, Islay and Kintyre, receiving very few productions. Across the central corridor work is more poorly shared across the Local Authority areas and concentrated in Glasgow and Edinburgh, which suggests that companies do not tour widely close to home. The majority of touring productions, over 60%, are new work. The touring networks across the country support promoters to take risks and programme these unknown pieces. The touring networks are a pivotal point of access in joining up the touring circuit and sharing work with local promoters. Where they are funded project to project they are at risk, as the networks can withdraw at any point and leave the local volunteer promoters unsupported. Tours are getting shorter and casts are small.
Recommendations	Look to address the gaps in distribution in the central corridor of Local Authority areas, and in the least visited areas. Establish long-term funding for touring networks to secure continuity. Examine ways to pool resources to generate work with a longer life and more resources through consortia. Establish targeted programmes of residencies and audience development to support touring work. Review priorities around the volume and balance of productions funded to tour by genre and scale.
Supporting Information	Strand 4: Section 5.1.1: Collaborative Touring Network Section 5.1.2: House Section 5.1.3: Dance Consortium Section 5.2.1: Theatre Hullabaloo.

4:8 Audiences do not sit at The Heart	
Context	The current touring ecosystem, shorter tours, the prevalence of one-night stands, a high turnover of touring companies and a perceived under/over-supply of product, presents a number of challenges in relation to attracting, retaining and growing audiences. High volume programmes and limited capacity mean venue marketing can often be generic, with the marketing of one-night stands and riskier work de-prioritised in favour of more commercially viable events. Audience development, unless specifically funded, is rare, and programmers admit they may operate from a limited understanding of their communities and potential audiences. Producer-supplied marketing collateral can often be more artistically driven than audience focused.
Recommendations	Develop systems to gather and share audience demographic data in order for producers and programmers to develop a shared language and enable collaborative, data-driven marketing. This will also deepen knowledge of potential audiences for new work. Develop alternative touring and funding models designed to support strategic audience development partnerships. Trial and share innovative marketing and sustainable audience development approaches, which encourage repeat visits and longer stays, and include a focus on depth of engagement and local impact. Support the development of work that is locally or regionally situated, and has increased capacity to resonate with audiences and communities. Develop training for producers to inform the creation of audience-centric marketing collateral.
Supporting Information	Strand 4: Section 5.5: Audience Agency's Show Stats Section 6.2: Building an audience for dance Section 5.1.1: Collaborative Touring Network Section 5.1.2: House.

4:9 Creative Scotland Data Collection could be Streamlined	
Context	This research demonstrates that Creative Scotland are listening to, and working with the sector to identify issues. This is the first time Creative Scotland has carried out a comprehensive analysis of touring data, building an accurate picture of the scale and reach of the work supported. The sector interpreted and answered the survey questions in a variety of ways which negated some data results.
Recommendations	Creative Scotland continue to measure against benchmarks gathered in the data reviews. Monitoring forms are reviewed to ensure a standardisation of answers, with appropriate guidelines for reporting. Open Project monitoring forms and RFO monitoring forms be aligned to collect comparable data. Explore online reporting options to make collation and reporting easier.
Supporting Information	Strand 2: Sector Survey Results.

Key Findings from each Research Strand

5:1 Strand 1: Data Analysis of Creative Scotland Funded Touring 2012-2016

5:1:1 Overview – key themes

- Across all three sections there is a clear seasonality in the touring circuit with peaks in spring and autumn.
- The geographic spread across Local Authorities is uneven with the main cities of Edinburgh and Glasgow along with Highland receiving the most toured work. The suburban central belt areas are some of the least well served.
- There is a high number of one night stands – where productions are only performing once at a venue. This is around 70 – 80% across the years and providers.

5:1:2 Section one: project funding 2012 - 2016

a) Profile

- A total of 136 awards were made through Creative Scotland project funding to tour theatre or dance productions between 2012/13 and 2015/16. This included performances at 1,282 venues. Theatre productions accounted for 75% of all grants and 82% of all venue performances.
- New work accounts for the vast majority of activity supported through project funding, comprising 75% of theatre productions and 94% of dance productions.
- Productions aimed at adult audiences accounted for nearly 70% of theatre productions and 82% of dance productions.
- Creative Scotland supported a total of 103 companies to tour work in Scotland from 2012 - 2016. 22 organisations were funded more than once to tour work over the four year period.
- Producing companies are mainly based in the main cities. 60% of the grants were awarded to organisations based in Edinburgh (29%) or Glasgow (31%).

b) Funding

- Creative Scotland awarded a total of 136 grants for touring work through project funding from 2012/13 to 2015/16 totalling over £5.9 million. 34 (25%) were dance productions and 102 (75%) were theatre productions.
- The number and value awarded increased from 2012/13 to 2013/14 and has remained largely stable since then. In 2015/16 (the first full year of the Open Project Fund) a total of 38 awards were made totalling £1.73 million.
- While the number of successful awards has varied the average grant size has remained relatively consistent at around £44,000 over the period. However, there is a high dispersal of award size ranging from £94,149 to only £1,500. Only seven awards received more than £70,000.
- 74% received at least 90% of the amount requested. In total 94% received at least 70% of the funds they requested. There is no clear pattern over time of amount awarded reducing compared to the amount requested.
- There is very little variance between the projected cost and the actual costs reported in the end of project monitoring forms.
- Dance consistently received higher average funding than theatre each year. Dance productions also had higher average projected costs at application stage. However, the number of dance productions is smaller and therefore trends are less conclusive.

- While average funding for dance has risen over the period, average award size for theatre has remained at the same level, despite projected costs increasing.
- Success rates ranged from 34% to 54% over the period. The success rate for 2015/16, the first full year of Open Project Funding (OPF), was 49%. This is higher than the OPF average success rate of around 30%.

c) Reach

- Only 25% of tours take place within a 16–25 day window with many tours spread out over longer periods of time.
- The average number of performances per production was 17.8. Shows for families and young people had a higher number of performances per production and theatre had a higher number of performances per production than dance.
- The average number of performances per production has declined for theatre over time from 25.2 in 2012/13 to 13.8 in 2015/16. There is a less consistent picture for dance.
- Productions toured to a total of 422 unique venues over the four year period, averaging 159 unique venues per year.
- 76% of runs at venues were ‘one night stands’ (performing only once per venue) This increases to 80% when looking only at shows with a focus on adult audiences. Only 6% of all venue runs had four or more performances of the same production.
- Productions were performed in all of Scotland’s 32 Local Authorities. The most common Local Authority areas were Edinburgh, Glasgow and Highland, collectively accounting for 29% of all venues, 30% of all productions and 43% of all performances.
- Creative Scotland funded productions toured to a total of 420 unique venues. 41% of which were micro scale (less than 100 seats). However, larger venues take a lot more shows, with mid and large scale venues hosting 50% of all productions.
- There is a clear seasonal pattern to the touring circuit with peaks of activity in autumn and spring. This is consistent across all four years. 41% of tours also started in their venues on a Friday or Saturday night.

5:1:3 Section Two: touring by Regularly Funded Organisations (RFOs)

a) Profile

- 33 organisations in receipt of Regular Funding toured theatre or dance work in Scotland during 2015/16, 22 were theatre companies, nine were dance and two were physical theatre. Collectively they toured to a total of 525 venues delivering a total of 1,752 individual performances.
- 75% of all venues toured to by RFOs were in Scotland. 25% were in the rest of the UK or international.

c) Reach

- The 33 RFOs toured productions to 394 venues in Scotland.
- 231 unique venues were visited, of which 176 only received one production.
- The average number of performances per venue was 2.7 across all venues.
- RFOs toured to 28 of Scotland’s 32 Local Authorities (the exceptions are Midlothian, Shetland, Western Isles and West Dunbartonshire). The most common Local Authority areas were Edinburgh, Glasgow and Highland which collectively account for 57% of performances and 44% of venue visits.

- Average attendance at venue visits was 228, however this is still very positively skewed from the median average of 73 due to the wide variance across venues (this is with one outlier removed from the sample).
- The tour calendar for RFOs reveals spikes in activity in spring and autumn, and also that Friday and Saturday are the most common start days for runs at venues.
- The Edinburgh Festival Fringe has a high impact on venue and geographic data, skewing the number of performances in August and in Edinburgh.

5:1:4 Section Three: overview of all touring in Scotland supported by Creative Scotland in 2015/16

- 67 organisations were supported to tour theatre and dance work across Scotland in 2015/16. This includes 33 RFOs and 34 organisations supported through Open Project Funding. Comprising of 18 dance companies, 47 theatre companies and two physical theatre companies.
- Creative Scotland supported 66 theatre and dance companies to tour productions to 705 venues staging 1,481 performances. Open Fund projects account for 44% of all supported touring activity (by number of venues toured to) with the remaining 56% of activity delivered by RFOs.
- Overall, across both Open Project and RFO, 70% of runs at venues involved only one performance. A further 16% presented two performances and only 14% presented three or more performances. RFOs were more likely to do more performances per venue – this is, in part, explained by a higher number of long-run productions at Edinburgh Fringe venues.
- Touring productions toured to a total of 332 unique venues in 2015. RFOs reached 231 and Open Project funded productions reached 306, suggesting that they have a broader reach. A total of 688 venue visits were made by productions presenting a total of 1,465 performances.
- 10 venues hosted 10 or more productions. 240 venues only hosted one Creative Scotland funded production in 2015/16.
- Creative Scotland funded performances were supported to tour to 31 of Scotland's 32 Local Authorities during 2015/16.
- Highland venues hosted the highest number of productions, followed by Edinburgh and Glasgow, then Argyll and Bute, and Dumfries and Galloway. Four areas had only one production tour to a venue in their area during 2015/16 and a further four had only two.
- The calendar of tours shows a peak of activity in spring and autumn; this is in line with analysis of previous years.
- Saturday was most common day for performances with 28% of all runs in venues starting then. Collectively, the weekend nights of Friday and Saturday accounted for 46% of all start days of performances.

5:2 Strand 2: Industry Survey of Producers and Promoters

5:2:1 Productions

- 74 organisations which produce work responded to the survey, including 59 which are exclusively producers and 15 operate as both producers and promoters.
- Production companies are most commonly based in Edinburgh or Glasgow – 70% of the producing companies which responded to our survey were based in Edinburgh or Glasgow.
- The touring sector is dominated by small scale work – 65% of the productions detailed by producers were small scale and 64% had a cast size of less than four.
- The majority of work being toured is 'new work' - 60% of productions were new work (this is likely to be an underestimate as data for 35 productions is not available).
- 70% of productions detailed by respondents were theatre and 26% were dance with 4% 'other'.
- Two thirds of companies' 'most recent productions' and 40% of the second most recent took place in the current financial year (2016/17) suggesting a very active touring sector.

5:2:2 Venues and Promoters

- 40 organisations which were venues or promoters responded to the survey, including 25 who are exclusively producers and 15 who were both producers and promoters.
- While the majority of work being produced is small in scale, only six (21%) of the main theatre spaces are small, 10 (34%) were mid-scale and 13 (45%) were large (500+) seats.
- Venues programme a wide range of arts genres, with work for children and young people featuring very highly across all venues. Larger venues had a far broader range of programming.
- Most venues had presented work from both Scottish and UK companies. 60% (15) of venues had presented international work.

5:2:3 Budget and costs

- 56% of programmers stated they thought their programming budget had stayed around the same, while 22% stated it had increased and 22% that it had decreased.
- Production Companies are largely seen as responsible for provision and meeting costs of production development (materials, rehearsal time and space).
- Audience development is a more mixed picture with promoters taking more responsibility for provision of audience development, marketing and accessibility costs and producing companies taking responsibility for the organisation and costs of workshops.
- Production Staging is more of a shared responsibility with the get in and get out crews and technical being provided by both producer and promoter – however producers were more likely to be seen to be meeting the costs. Producer companies were almost always seen as responsible for the provision and costs of accommodation and transport.
- There is significant variation between producers' and promoters' views of who took responsibility for the provision and costs of these core functions. Producers stated that they mostly provided and met the costs of all functions.

5:2:4 Fees

- The most common funding structures were 'upfront fee' (56% stating they experienced this most of the time or always) and 'Box Office split – company gets majority' (46% most of the time or always). 16 respondents stated that they had occasionally experienced arrangements of 'no fee to company'.
- 62% of all respondents had seen a change in fee structure. However there was a distinct split between promoters and producers with 68% of producers stating that they had seen a change compared with only 40% of promoters.
- The key changes experienced were lower fees and a move from fees to box office split.
- There is a strong feeling from producers that they are 'taking all the risk' and that payment structures are irregular and vary from one organisation to the next.
- The key issues highlighted by respondents in the final comments section include:
  - A reduction in fees meaning they can no longer sustain touring.
  - Frustrations around effectiveness of exacerbated by many performances being 'one night stands' and a lack of continuity in tours.
  - Venues report an oversupply of small scale and new work and an under supply of mid-scale work.
  - Venues are becoming more risk averse and there is a specific reluctance to programme dance.
  - Uneven distribution of supply across the year with peaks in spring and autumn.

5:3 Strand 3: Qualitative Research into Touring Theatre and Dance in Scotland

5:3:1 Audiences are at the heart

Audiences are at the heart of everyone's organisational aspirations.

5:3:2 Defining success

The touring theatre and dance sector is largely perceived as 'hit and miss'. There is no clear sector-wide understanding of what a successful touring theatre and dance sector looks like. The following is a distillation of the key points made when asked to suggest success criteria for the sector:

a) There would be a clear sector-wide understanding of what a successful touring theatre and dance sector looks like.

b) Audiences across Scotland would have year-round access to a range of high quality work of different genres and at different scales.

c) The touring theatre and dance sector would be relevant to audiences and seek to engage them beyond the stage.

d) The touring theatre and dance sector would be efficient, sustainable and thriving.

e) The touring theatre and dance sector would be powered by astute audience and marketplace data.

5:3:3 Articulating the shift

Participants identified a number of contextual shifts which they believe have impacted on the sector in Scotland over the past 10-15 years:

a) Creative Scotland's funding priorities and the balance and distribution of touring. There is a perceived oversupply of small-scale edgier work, dance in particular, at the expense of middle-scale mainstream touring, which venues believe, there is unmet demand for. Many of these small companies are concentrated in the central belt and do not tour widely. Views were split about their public value and concerns were raised about the frontloading of investment in developing this new work whilst high quality proven work is rarely given a second life to reach more audiences.

b) Creative Scotland's Open Project Fund is perceived to have negatively impacted on the touring ecosystem. Producers were critical of a perceived lack of strategic priorities around a very open, opaque and over-subscribed fund. In their view, Creative Scotland has an implicit priority based on volume, preferring to fund a high number of smaller applications over more costly ones. Producers feel under a huge amount of pressure to reduce the amount of funding they ask for, to levels which they consider unsustainable. They questioned whether Creative Scotland had a realistic understanding of, or are simply not acknowledging, the rising cost of touring and rates of pay. In response, some producers have submitted applications for less than they need upfront in order to increase their chances of obtaining the funding.

Producers believe the amount of cost-cutting they've been asked to commit to is excessive and is one of the reasons behind shorter tours. In addition, low fees mean there are insufficient margins to support tour extensions. The rolling nature of the fund has disrupted the planning process between producers and programmers because of the dislocation of funding/programming deadlines and lack of certainty around whether funding will be awarded. As a project fund, touring has become focused on the short-term at the expense of long-term planning and relationship building.

c) Declining guarantees and a shift to Box Office splits is undermining the sustainability of smaller-scale companies. Programmers are, through financial necessity, striking harder deals for work that is small-scale and/or risky. Regularly Funded Organisations (RFOs) were cited as the 'worst payers'. Described by producers as a rise in 'market forces', this shift is having a disproportionate effect on their ability to tour as they find themselves bearing the financial brunt of the risk. This, together with the rising costs of touring, creates challenges around the ambition, length and distribution of their tours.

d) The increasingly unfathomable money-go-round of subsidy. The way touring is currently funded is regarded, variously, as overly complex, seemingly unstrategic and opaque. Subsidy and cross-subsidy flow among and between parties with no systemic understanding of is movement or efficacy.

e) Local Authorities and Cultural Trusts are adopting an increasingly commercial approach to programming. The on-going Local Authority budget cuts and shifting priorities of Cultural Trusts means producers are experiencing the sharp end of a more commercial mind-set and a resistance to riskier work which was described as an 'erosion of artistic integrity'.

f) The creation of a dependency culture: One view was put forward that there is an over-reliance on funding due to a lack of an entrepreneurial mindset and an expectation that risk must be wholly supported through subsidy. This leads to a distortion in the market-place where too much work is being supported that cannot attract audiences.

g) National Theatre Scotland is operating independently of the touring sector. Funded directly by the government and fulfilling a separate set of criteria to touring, programmers in particular believe NTS is operating in competition with them rather than working with the touring sector to build audiences as part of a more integrated approach.

h) Insufficient training and progression routes resulting in a skills shortage. There is a lack of good quality training provision for technical staff. Opportunities for progression are limited due to the declining number of small-scale companies able to afford technicians. Another view put forward was that NTS is 'hoovering up' the talent and 'fast-tracking' them to the mid-scale, meaning many young professionals are not cutting their teeth on small-scale and rural touring. From an artist perspective, theatres may be cautious about releasing staff time and resource to support artist development whilst a reliance on project-funding does not provide the continuity of resource to invest in professional development.

5:3:4 Tour booking – a producer perspective

a) An oversupply of work shifts the balance of power to the programmers. There are two main touring windows in the year which creates a bottleneck of competing companies in a condensed period of time. The perceived over-supply of small scale companies means more work is being produced that can be programmed, shifting the balance of power to programmers who can now increasingly determine the terms.

b) Meaningful dialogue with programmers is on the wane. Producers are frustrated that they don't have the capacity to invest the time and resource needed to develop informed relationships with programmers, reducing much of their contact to a sales pitch rather than a meeting of equals.

c) The increased commercialisation of the touring relationship. Programmers are increasingly charging for services that used to be free which places additional financial burden on the producers.

d) The rise of the one-night stand. Producers are frustrated at the rise of single night bookings, usually at the weekend. It creates hidden costs around empty days, limiting the duration and reach of the tours, and precluding the opportunity for word of mouth to build audiences.

e) The precariousness of the verbal agreement. The practice of penciling-in tour dates is being used by some programmers, variously, as a delay tactic, a means to hedge their bets, and an avoidance strategy. This brings increased stress and uncertainty to the producers as well as a profound loss of trust.

f) Programmers' limited knowledge stifles dance touring. Programmers are unwilling to programme more than one or two dance events a season/year because they believe there is no audience for it. This has been attributed, by producers, to poor understanding about the form and lack of knowledge around how to develop audiences for dance. The perceived impacts are that the capacity for dance touring has shrunk, the potential to grow audiences is unrealised, and dance programming in Scotland doesn't represent the breadth of dance that is being produced there.

g) The revolving address book. There is currently no centrally managed resource to efficiently support tour booking in a complex and rapidly evolving sector. The imminent **Tourbook website** was suggested as a solution, though questions were raised about the authoritativeness and usefulness of a site which depended on people opting in and updating it themselves.

5:3:5 Programming: a programmer perspective

a) The challenges around scheduling. The rolling nature of the Open Project Fund, predicated on indicative tours and 'notes of interest', in reality produces a high degree of uncertainty around scheduling. In addition, the bottlenecks created by the Edinburgh Fringe and Christmas season are resulting in an uneven distribution of work which makes it difficult to maintain a consistent year-round programme of quality work.

b) Programming blind. The increasing number of small companies supported through the Open Project Fund means programmers find it hard to keep abreast with the influx of new talent and often have to programme sight-unseen.

c) Unable to strike a balance in an imbalanced sector. The dearth of middle-scale high quality mainstream work means venues are not earning sufficient box office income to subsidise riskier work.

d) A surfeit of low quality dance. Programmers believe the proliferation of new, relatively inexperienced companies being supported by Creative Scotland has resulted in work that is not of a sufficiently high standard.

e) The discomfort of negotiation. Programmers experience a considerable degree of discomfort around negotiating the deal. Some of this discomfort centres on feeling guilty about the necessity of negotiating fees which, sometimes, are lower than the perceived worth of the work. It also arises from the difficulty of negotiating when each party is operating from a limited understanding of each other's position, not having enough time to talk meaningfully about the work, and having to field un-informed sales pitches.

f) The difficulty of delivering diverse programmes for rural communities. Distance, the cost of travel, poor communication, and the belief that some companies think rural touring lacks the status of larger venues in the central belt, were some of the difficulties attributed to attracting a varied programme to remote and rural areas.

5:3:6 Building audiences: a producer perspective

a) Smaller companies have low priority status. Some producers are finding it hard to engage venues in collaborative marketing and believe their work is being de-prioritised in favour of companies with the potential to deliver better return on marketing investment.

b) The additional sting of the contra deal. Contra deals, where producers are expected to contribute financially towards the costs of venue marketing that used to be free, means they now have to cover both their own marketing costs and a proportion of the venue's.

c) A lack of confidence in venue marketing support. Some producers have experience of supplied marketing collateral and on-line resource remaining unused.

d) Audience development is a luxury rather than a necessity. Producers find that audience development is not on the programmer's agenda unless there is additional resource to support it.

e) Operating from a shallow understanding of the work. Venue marketers are too stretched to take an informed interest around marketing every visiting company and operate from a shallow understanding of the work, particularly in relation to one-night visits of small-scale work.

f) Disagreements around sharing audience contact data. Some producers would like to be able to develop relationships directly with audiences and are being met with strong resistance from programmers who are reluctant to hand over contact data.

5:3:7 Building audiences: a programmer perspective

a) Marketing high volume programmes with limited resource. High volume programmes reduce venue's capacity to provide the tailored marketing support across a diverse programme of work, leading to marketing that can be generic. Tough decisions have to be made in relation to where spend is best allocated, meaning small-scale work can lose out. In addition, budget and staff reductions at civic venues, together with a perceived de-skilling of marketing practice, dilutes the quality of marketing support for touring work.

b) Programming as an audience development tool. Programmers shared examples of programming around national theme days and events, and creating their own festivals or distinct programming themes within a season, as a means to attract and develop new audiences. Some have committed relationships with specific companies in order to build audiences over time. This was more evident with RFO venues than civic venues and rural promoters.

c) The variability of marketing support provided by producers. Programmers find that there is an expectation from some producers that, once they have supplied the core marketing collateral, all the marketing will be done for them, which is not always the case. The quality and usefulness of the support different producers offer is determined by the degree of skill and resource they have. Copy can often be written from an artistic perspective which then has to be 'decoded' by the venue marketing departments into a language audiences can understand.

d) Operating from a shallow understanding of the audience and marketplace. Programmers admitted they have limited knowledge about their potential audiences and communities. Some also questioned the validity and effectiveness of the audience data they have.

e) Disagreements around data sharing. Programmers and their marketing departments are unwilling to hand over audience contact data for reasons of data protection and their own self interests.

5:3:8 Towards Success

Participants made a number of recommendations around future priorities for the sector in Scotland:

a) Fresh, brave thinking is required. Participants want brave thinking to navigate the changes they believe the sector needs to undergo.

b) Work towards sector alignment around a shared vision. A shared vision, a re-commitment to the purpose and value of subsidised touring and clear success criteria that everyone can work to, criteria that aren't wholly predicated on income and audience numbers.

c) Establish strategic funding priorities and mechanisms everyone can subscribe to. Review the current funding mechanism and how subsidy moves through the system. Develop clear funding priorities and ring fenced funding for touring. Take steps to ensure diversity of programme at RFO venues. Seek ways to better support risk, obtain best value from proven successful work and invest in artistic and skills development.

d) Create a transparent funding mechanism that supports the best chance of a successful application.

e) Do less, better. Establish a more intelligent use of resource by funding fewer touring companies, with a re-focus on artistic quality, audience development and reach.

f) Greater industry dialogue and exchange. Introduce a sector-wide gathering (in addition to the Emporium and Early Dialogue Days), the focus of which will include strengthening shared purpose, fostering creative exchange and developing a more informed understanding of the whole touring ecosystem.

g) A centrally managed approach to showcasing work. Instigate seasonal showcases where multiple companies can share their work for programmers and allow them to see a critical mass of work in one go.

h) Support deeper, more sustained audience engagement. Creative Scotland suggested an increased focus around audience engagement (e.g. socially engaged, participatory, place specific) to establish more meaningful relationships between audience, artists and programmers/promoters, deepen the impact of the work and build new audiences.

i) We can work better together. Everyone believed there is need for improved communication, honesty and genuine exchange within the sector to foster more productive partnerships, mutual understanding and common purpose. Producers and programmers would work together around creative collaborations, shared investment and joint audience development and engagement activity. National touring companies would be funded to tour as part of the touring sector with the aim of building audiences for touring as a whole. Programmers work together to support touring through the creation of formal or informal consortia, as well as find ways to reduce touring costs.

j) Investment in marketing and audience development. Engage marketing staff in internal programming discussions and invite them to industry events and showcases about the work being produced. Invite marketing staff to see the work and to meet the artists. Invest in marketing and audience development training. Support innovative audience development initiatives that bring fresh thinking and practice to the sector. Establish regional and national audience benchmarks around ticket sales and income, by genre and scale, to inform budgets and target setting. Increase scrutiny of marketing and audience development in funding bids.

k) A centrally managed resource for tour booking. Create an authoritative and current resource that will streamline tour booking and aid communication between producers and programmers.

5:4 Strand 4: Literature and Practice Review

5:4:1 Current public funding for touring across the UK is inconsistent

There is an inconsistent picture across the UK in terms of the public funding of touring work.

a) Strategic Funds

Support for touring work differs across the UK's arts funding bodies. Arts Council Wales and Arts Council England are the only two to have ring fenced strategic touring funds. In Wales it demands geographic spread from large scale productions. In England it has a broader range of priorities.

Arts Council England's Strategic Touring Fund supports touring work, focusing on:
- areas where people have low engagement with the arts
- areas that rely on touring for much of their arts provision
- geographically isolated areas
- areas with a lack of local artists and arts organisations
- extending the reach of high-quality work by broadening the range of venues presenting it
- forging stronger relationships between audiences, promoters, programmers, artists and producers.

b) Length of terms of support

There is long term support of 3-4 years for touring organisations across the UK, except in Northern Ireland and Wales, where the maximum term of support committed is one year. All areas offer short-term project funds on a tour-by-tour basis.

c) Support for audience development varies

The Arts Council of Wales is the only body with a distinct Audience Development fund. This supports activity which is additional to the requirements within project funding that they have robust audience development plans and a commitment to sustaining and developing audiences.

d) Creative Scotland has no specific touring strategy

Grant applicants have less clarity on explicit priorities for touring work from Creative Scotland than previously. Neither Regularly Funded Organisations nor Open Project Fund guidelines clearly set out strategic priorities relating to touring work beyond the aims in 10 year plan. Guidance for OPF is limited to a short information sheet and there are no specific Creative Scotland regarding reach, distribution, balance of genre, or priorities for 'new' over classic and remounts of work.

When compared to Scottish Art's Council's touring strategy, the information guidelines available from Creative Scotland are minimal and not specific to touring.

5:4:2 How does touring in Scotland now compare with other models?

a) Networks in Scotland

There are five key touring networks operating in Scotland - Arts nan Eilean in the Western Isles, the Touring Network in the Highlands and North of Scotland, North East Arts Touring, Dumfries and Galloway Arts Festival and Borders Live Touring.

All have similar aims:
- to support local promoters to take work, and to book more adventurous and diverse programming
- to coordinate touring shows across geographical areas
- to bring work to audiences who wouldn't otherwise have access
- to support producing companies to tour widely.

There are key variations in funding and delivery models of the touring networks including practice around fee structures for producers, how they recoup income from box office and the timescales for producers to take part in their touring schemes.

b) Precarity

North East Arts Touring and The Touring Network are the most established schemes and deliver opportunities for promoters to develop, and youth promoter schemes alongside the main programme. They are both Regularly Funded Organisations.

The other schemes are funded by Creative Scotland through Open Project Funds and in some cases by Local Authority support. They are at risk of discontinuing, not necessarily because of lack of funding opportunities, but where the organisations involved do not prioritise the network activity. They may have other priorities in terms of applications they are making or when planning how to direct their energy.

5:4:3 Has the touring environment changed?

a) The issues facing dance and theatre touring are still pressing

There appears to have been little progress in the way touring happens and many of the issues facing dance and theatre touring raised in Creative Scotland's **Theatre Sector Review**, undertaken by Christine Hamilton in 2012 remain constant, such as the seasonal bottleneck of work, the feast or famine cycle of availability, and the struggle to spread risk evenly between programmers and producers. There is also continued reporting of under-provision of mainstream work which was identified in John Stalkers' Commercial Theatre Report 2012.

b) Funding has changed

There have been significant changes in the landscape in recent years in Scotland. These include the move away from art form specific funding, and the subsequent move away from touring-specific support. This removed the clarity of information regarding funding priorities and objectives regarding touring work for grant applicants.

Creative Scotland discussed proposals for a strategic touring fund in early 2013, but it was not progressed by the sector.

There has been a 20% reduction in Local Authority support for Cultural and Heritage Services which has had huge impact on Local Authority venues, and their ability to programme touring productions.

c) Balance of risk is still a concern

Based on the literature there is little evidence of change in the balance of risk between programmer and producer. The **Dance Sector Review** and Theatre Sector Review 2012 both highlighted the issue, typified in a perceived decrease in guaranteed fees for productions and more box office split arrangements.

d) New networks of support are available

There have been new organisations welcomed to the network of supporting agencies with the addition of Dumfries and Galloway Arts Festival, Glasgow Arts Community Touring and Borders Live Touring to the touring networks. These are expanding the provision of help for local promoters who want to bring shows to their area, and also supporting touring companies who are keen to get their work out to audiences.

5:4:4 Other models of working

There appears to be scope for other models of working that move away from reliance on public funding.

a) There are opportunities for subsidised and commercial theatre to work together, with models based on return on investment, and further exploitation of successful work.

It may be possible to get commercial producers to take on the 'second life' touring of work where a production has shown box office success; or to invest up front in the original production of work with a view to lucrative West End or large scale touring transfers.

b) Consortium working models are a positive way of working collectively - Consortia allow organisations to come together to pool their resources and share the risk of touring. They can:

- build around a shared scale of operation
- build around a shared interest in the genre they are working in
- attract international or interesting work through a critical mass of dates they are able to offer, or through a geographical cluster of dates
- work through organisations to mutually benefit marketing, technical and outreach departments with shared collateral and resources.

c) Charitable Trusts are funding touring consortia - There are opportunities to look outside public funding for financial support for strategic touring initiatives. In the UK, Charitable Trusts are supporting touring consortia and networks in order to address social equality issues and strategically reach audiences who have a lack of provision in their local area.

The Farnham Maltings Greenhouse Programme and Battersea Arts Centre's Collaborative Touring Network both receive substantial support from trusts. These programmes enjoy a clear alignment of values and purpose which is socially impactful, audience focussed, and has a strong socially engaged agenda.

5:4:5 There are examples of good practice to learn from

Across the UK there are examples of successful touring supported by public funding and trusts, pooled resources, deep audience engagement programmes and networked systems of data sharing.

a) Touring consortia working for common goals
There exist several examples of consortia or networks pooling resources to tour work across specific regions or to targeted audiences.

These include large theatres working together to amplify their buying power and consortia of shared interests developing genres. These consortia build capacity, skills and expertise in their own organisations and artforms.

b) Strategic touring funds are useful
The support of strategic funds allows networks to examine gaps in provision and to address these. Particularly in England and Wales, there are examples of those funds addressing gaps in provision and access. The dance sector is particularly employing planned strategies to reach audiences.

c) Using longer runs and residencies to make work to tour creates more meaningful encounters
Developing deeper engagement with locals and longer stays in communities allows companies to create work with specific local context which has a deep relevance, and which resonates with and attracts new audiences.

Deeper local engagement - There are positive advantages for audiences where companies adopt a slower rate of touring with a deeper local engagement. Both Fevered Sleep (England) and Performing Lines (Australia) have set examples of ways of working which more deeply engage with the areas they visit, by spending more time in the local venues and hosting workshops and activities with communities over a period of time. Particularly for dance, this helps in finding points of relevance and opportunities for participation that don't rely on an understanding of dance or predisposition towards attending.

Audience development through residencies
Hosting a producing company within a venue to make work that will then tour, is one method of creating work around a venue's audience. Both Battersea Art Centre's Collaborative Touring Network and Creu Cymru's Dance Buddy employ this method. Artists and audience build their relationship with the work and then share it in the wider world, creating work with specific local context which has a deep relevance, and which resonates with and attracts new audiences.

d) Very little is shared about the methods venues use to approach programming
There is very little written or shared about the process of putting a season together for venues, leading to a lack of understanding which can disadvantage everyone involved in tour booking conversations.

e) Good practice in sharing audience analysis
The Audience Agency's Show Stats system in England is working to address the reporting needs of touring organisations, allowing them to access demographic information about their audiences, and to develop a shared language with the venues. This will contribute to more meaningful conversations about markets and audience development for touring productions.

5:4:6 International models of working

There are interesting international models of developing relationships with audience, selling shows, getting work out of the cities across a country and supporting work to tour in an economically viable way.

a) Slow touring with local engagement
Australia's call for slow touring and deeper engagement with local communities has led to some successful experiments in audience development. Spending time in a town and working with groups to explore the themes of the performance beforehand, really engaged the audience for Shiver. Whilst the tour was contemporary dance, the workshops were not exclusively so, focussing on the thematiCreative Scotland of the work, loss, to create authentic points of resonance between audience and art irrespective of form.

b) Varieties of showcasing and pitching possibilities
There are exciting variations available in the way performances are pitched to programmers and promoters, and the stages they are at when those conversations take place. There seems to be a healthy variety and range of opportunities to start those conversations in Western Australia.

c) Joined up dance touring with full recovery fees
Over 10 years, Sweden's Dancenet has successfully taken touring dance out of the cities and spread it right across the regions and towns of Sweden. They promote meetings across all levels of their member and partner organisations, including technical staff and marketers to discuss the programmes. They pay full cost recovery fees to the touring companies, which supports economically viable tours.

d) Economically viable touring
Denmark's Touring Network offers a full cost recovery approach to paying producers fees. Once accepted into the curated programme, producers are able to tour with confidence that they can afford it.

Appendix 1: Focus Group Participants

Venues and Programmers

Mari Binnie	Glasgow Life
Liam Sinclair	Byre Theatre
Vicktoria Begg	Dundee Rep Theatre
Peter Renwick	Dumfries and Galloway Arts Festival
Linda Crooks	Traverse
Evan Henderson	Arts in Fife
Ben Torrie	Aberdeen Performing Arts
Roz Bell	Eden Court
Christine Martin	Paisely Arts Centre
Jan Harrison	Birnham Arts
Jo Mclean	The Touring Network
Emyr Bell	North East Arts Touring
Julie Ellen	Macrobert Arts Centre
Jackie Shearer	Beacon Arts Centre

Producers

Belinda McElhinney	Barrowland Ballet
Susan Hay	Marc Brew
Catriona Tyre	Cat Tyre
Alice McGrath	Red Bridge Arts
Janet Coulson	Firebrand
Michael Emans	Rapture
Eileen O'Reilly	National Theatre of Scotland
David Hutchinson	Sell A Door
Joan Cleville	Joan Cleville Dance
Robert Softley Gale	Birds of Paradise
Rebecca Davies	Stellar Quines
Ewan Downie	Company of Wolves
Aiyana DArcangelo	Scottish Dance Theatre
Louise Gilmour-Wills	Catherine Wheels
Verity Leigh	Magnetic North

Federation of Scottish Theatre

Jon Morgan	Former Director

Creative Scotland

Laura Mackenzie-Stuart	Head of Theatre
Lorna Duguid	Multi-Artform Manager
Laura Cameron-Lewis	Head of Dance
Lulu Johnston	Dance Officer

Appendix 2: Survey Participants

Promoters

A Blank Canvas
All or Nothing Aerial Dance Theatre
Asylon Theatre
Barrowland Ballet
Birds of Paradise Theatre Company
Borderline Theatre Company
Brunstane Productions Ltd
Charioteer Theatre
Company Chordelia
Company of Wolves Ltd
conFAB
Cultured Mongrel
Curious Seed
Dance Ihayami
Dogstar Theatre Company
Fire Exit Ltd
Firebrand Theatre Company
Fronteiras Theatre Lab
Glas(s) Performance
Grinagog Theatre Company
Indepen-dance
Independent Artist (anon)
Independent Artist (anon)
Jabuti Theatre
Joan Clevillé Dance
Lung Ha Theatre Company
Magnetic North
Marc Brew Company
Mischief La-Bas
Poorboy
Rapture Theatre
Right Lines Cartoon Theatre
Scottish Ballet
Scottish Dance Theatre
Scottish Opera
Scottish Theatre Producers
Sell a Door Theatre Company
Showroom
Solar Bear
Spinning Pizza Arts
Spotted Stripes Circus
Stammer productions
Starcatchers
Stellar Quines
Stillmotion
Strange Town
Terra Incognita Arts
The Occasion
The Walking Theatre Company
Theatre Broad
Tortoise in a Nutshell
Treading The Borders Theatre Company
Tricky Hat Productions
Visible Fictions
White & Givan
YDance

Producers / Venues

Aberdeen International Youth Festival
Aberdeen Performing Arts
An Lanntair
Aros Centre Isle of Skye
Ayr Gaiety
Birnam Arts
Bodysurf Scotland
Byre Theatre / University of St Andrews
Citizens Theatre
Comar (Mull Theatre)
Cumbernauld Theatre
Dumfries and Galloway Arts Festival
Dundee Rep Theatre
East Ayshire Leisure Trust
Eden Court
Falkirk Community Trust
Festival City Theatre Trust
Fife Cultural Trust
Freelance
Glasgow Life / Glasgow Arts
Horsecross Arts
Macphail Centre
North East Arts Touring
North Edinburgh Arts
Pitlochry Festival Theatre
Platform
Puppet Animation Scotland
Renfrewshire Leisure - Paisley Arts Centre
Rural Nations Scotland CIC
SEALL
The Swallow Theatre
The Touring Network
Theatre Royal Dumfries
Traverse Theatre
Tron Theatre

Some respondents remained anonymous