


Arts Marketing
Association



AMA Symposium 2005

A ROAD MAP TO UTOPIA

In partnership with

*The***Guardian**

The Observer

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**LONDON
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SYMPOSIUM REPORT

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Introduction

The symposium started in 2003 to meet the needs of the AMA's more senior members (arts professionals with ten or more years' professional experience). It focuses exclusively on 'big picture', sector issues and is less concerned with offering practical learning experiences that are directly relevant to the delegate's job. The symposium is programmed for people with ten or more years' professional experience in mind.

This year, the symposium provided an opportunity for senior arts professionals to plan collectively for the next twenty years – to agree a blueprint for the future for the arts and audiences. It brought together marketers, managers, audience development professionals, policy makers, cultural planners, artistic directors and curators, and offered a three-cornered structure:

- Visioning Utopia: what could the UK arts sector look like for audiences in 2025?
- Looking Out: what opportunities and challenges might help or hinder this vision?
- Looking In: using this knowledge, how might we create a road map to a realistic Utopia and make it happen?

The programme was delivered in a series of presentations, debates and facilitated discussions with the final plenary presenting a summary of what the symposium participants felt to be the salient points of the two days.

The AMA enabled delegates to keep abreast of innovative products through the conference exhibition and for those wishing to relax, they added yoga sessions and sugarfreedesign provided a chill-out area featuring a new work by artist Carey Young that delegates could take part in.

Debate

Visioning Utopia

Seven panellists were asked to present their Utopian vision of what the UK arts sector could look like for audiences in 2025.

Howard Rayner – Hallé Orchestra

It has taken the human race around two million years to get to where we are now. We are driven by stories, and that won't change in the future, because they help our understanding of the human condition. What *is* clear is that participation and involvement are ever more important, and we have ever widening choices. Those that pursue insight and quality will win out. Environments will help to integrate art forms and these, together with burgeoning technology, will provide multiple platforms for artists to present their work.

We will also need places to be still and concentrate.

Customisation and the desires of the individual will be to the fore together with the counterbalance of the need for community.

Dr Tom Shakespeare – University of Newcastle

It's tough to make projections, especially about the future.

What we know is that we have an ageing population, and the future will contain far fewer children and young people; we are becoming more diverse; and more educated – nearly 50 per cent of the population now receives some higher education qualification whereas 50 per cent of people over 65 have no qualifications at all; and we are becoming more affluent – in 2002 the average income was £44,000.

We will buy our books rather than using libraries; we will stop buying CDs as we download more and more of our music choices on our MP3; and our global view means that as venues we will compete more with overseas venues.

As we express ourselves as individuals more, we will also crave collective, ritual participation.

Boundaries between art forms will blur as will the distinction between audiences and those who participate. Artists and companies will find new channels of delivery and organisations

will depend on strong leaders who are both skilled and flexible enough to respond to the mixed environment.

Victoria Todd – National Campaign for the Arts

What is sure is that the National Campaign for the Arts will be here forever as there will always be something to fight for. My vision is that the arts will play a pivotal role in education, in the lives of children from the age of three upwards, and that it will be integral to all curriculum subjects.

Felix Cross – Nitro

Nitro was formed 20 years ago as the Black Theatre Co-operative to present musical theatre influenced by the mixed cultural sources of migration. In that time, the profile of the population of those running organisations and producing art has changed (there are fewer Oxbridge men around now) and will continue to do so.

Migration is the most important cultural phenomenon. From the 1950s to 1989, migration was characterised by the post-colonial era. From 1989 to the present it is post-cold war, where immigrants have little historical link to the country of adoption.

This presents a problem for the arts: just when the industry appears to have got the mixed cultural idea, the world has changed again.

My plea is that we will hungrily embrace diversity as exciting and essential. And by diversity I mean true diversity, not just Black and Asian, because good ideas are as rare as gold nuggets and may come from anywhere, as long as we are open to them.

John Holden – Demos

There's a triangle of relationships here: the public vote for politicians, politicians decide on the framework and structure of funding the artists, the artists provide for the people. But the dialogue between these bodies is either absent or dysfunctional.

People primarily value two things about the arts:

- experiences which help them shape themselves;
- to be treated well, honestly and straightforwardly.

They don't care about what the funders care about. My vision is that the professionals will talk to people and will embark on an adult conversation concerned with creating for and with the public. Then politicians will fund what the public values.

Rosie Millard – BBC

Why is the Donmar Warehouse putting on *Guys and Dolls* when there have been several productions in recent years? Why is the Tate trotting out Monet again? My vision is that there will be a ten-year moratorium on the public funding of any classics – or, to go further than that – any repeat performances.

New work provides vibrancy but people are conservative and don't want to spend £40 on a risk. Subsidised organisations shouldn't be allowed to do repeats: it's the egos of the directors and actors, and the greed of the producers, which are ruining audiences. It can work – look at the film industry where only new work is funded. The Opera House should not be allowed to do what Raymond Gubbay does.

John Tusa – Barbican Centre

My vision is that government funding will be index linked (it is not honest at the moment). Preoccupations and arguments about elitism, instrumentalism will stop. Artists will have abandoned their phobia about the arts being 'business' and that there will be a blurring of the line between radical innovation and the creations of the past.

Questions

Q: Alice Black - Imperial War Museum

Rosie Millard's vision is in danger of denying important and beneficial cultural activity to children and immigrants and others not so familiar with these cultural references. John Holden's vision tends towards giving the public what they want.

A: Rosie Millard

I agree, but I am only asking for it for ten years.

A: John Holden

I just think that the public should have more of a voice.

A: Felix Cross

We could get around the problem by asking that the big organisations be funded by Heritage money.

C: Richard Bliss – Northern Stage

I think the notion of artists, performances and audiences as we think of it now won't exist in 2025. There is a down-grading of the cannon in school but young people are using their creativity in ways unknown to us.

Q: David Moutrey – Cornerhouse

Maybe we should be using the arts and culture to re-examine our identity and our place in the world as they have done in Australia.

C: John Holden

For me the marketing role is in mediating between artists and audiences so that there is no language divide. This means that we have to listen.

C: Emily Till – The Sage, Gateshead

We advertise our folk music as 'tradition in the making'. This doesn't quite work with Rosie's comments.

C: John Holden

Perhaps you could read *The Right to Art* by John Holden and Robert Hewison. The two key things to create audiences are socialisation and early exposure. Get this right and audiences will be there.

Cultural aims are sometime subverted by dishonesty in the system, especially when organisations have to fill in application forms stating objectives that they can't possibly be expected to fulfil.

C: Heather Maitland – Consultant

This is going to get worse as grants begin to go out to tender, and only those who make the most rash promises to deliver will get funded.

C: John Tusa

If we believe this can't work, then we have to find ways of saying it. We must have this debate – but do we have the guts for it?

Q: Ben Jeffries – Arts Council England, London

Can the panel members' Utopias be achieved through existing funding structures?

A: John Holden

We should stop funding things once they have done what they were funded for because that frees up the money for new things and new artists.

A: John Tusa

Arts Council England needs a letterbox outside (as they have, or used to have, in Italy) where we could denounce our fellow citizens! Somewhere we can cite names of organisations that have outlived their usefulness.

C: Ben Jeffries – Arts Council England, London

I agree. Arts Council England should be a listening organisation.

A: Rosie Millard

Except then you would get rival organisations voting for each others' closure. The vulnerable and more valid ones might go out of existence.

Q: Dave Moutrey – Cornerhouse

My Utopian vision is that I will be spending my pension on going to the Barbican. But it remains Utopian because I work in the arts and I have no stake in this business, and I get paid badly. I also don't get any intellectual property rights. What do you think about the way we look after each other in the arts?

A: Rosie Millard

It's the same for people at the BBC.

A: John Holden

Yes, we should have a better eye for the long term.

C: Dave Moutrey – Cornerhouse

Compulsory pension contributions will be a further drain on our organisations' resources.

Q: Lee Rotbard – London Calling

I want to get back to an earlier point. We are trying to shape our audiences to fit our art. If we take Victoria's point and start educating at three years old, the government can get off the 'inclusion' bandwagon and the audiences will be there.

C: Rachel Kelnar – Henley Centre

I do a lot of scenario planning with people, and this group here today are to be congratulated on at least grappling with your futures.

Summary: Ivan Wadeson – Arts about Manchester

On that positive note, we must wind up. There is a role for the visionary and a place for collective action in affecting change, but in all of this discussion the crucial questions are what is the role for the arts, and how can it justify its existence? We need to grapple with these over the next 24 hours.

Keynote speeches

Informing the Road Map

Four speakers each made predictions for how the world might change between now and 2025.

Bill Thompson – New Media Pioneer

We have a rich and complex relationship with new technology; we shape and are shaped by technology within a capitalist framework. It has similarities with the arts where reflexivity is all.

There are three constraints on the possibilities for the future of arts and technology:

- Physical reality (the constraints of the technology – we don't have endless supplies of clean energy, and we don't have time travel – these may still not be solved by 2025);
- Human desire – there are some things you can't make people want;
- Chance and contingency – is the right thing available at the right time, or the right person in the right place?

Linear projections don't work in technology – at least not for very far into the future. We could reasonably predict as far as 2010: it is fairly certain that by then we will have free wireless access and flexible folding screens; it is sure that peer to peer will be the core distribution method, and doubtless the digital divide between the haves and have-nots will remain. Further than that it is trickier to predict; at best we can tell plausible stories about the future.

Story 1: By 2025 the magic will be gone. We won't notice it and we won't look for it. We will assume wireless connectivity in the way that we assume light or water.

Story 2: Bleeding edge toys will be around but not common – toys for rich people. These might include holographic projection, quantum computers, direct neural input (jacks in the neck).

Story 3: The drivers of technology will probably be the same: pornography and crime (especially fraud) pushed the boundaries of technology in the 1990s (such as streaming and online payments). Watch out for teledildonics – which may have additional user interfaces! – avatar fraud and pre-crime (brain-scanning and brain-imaging).

Story 4: the media landscape will change. We will still call it 'new media' and there will still be print and television, but the boundaries will have disappeared, and the distinctions will not reflect the reality. Big media conglomerates will proliferate. Technology will converge and 'the spew' will emerge – one pipe coming into your home with data being decoded on arrival to provide our needs. Analogue will be switched off in around 2012, and digital will end in 2015. Broadcasting will become publishing with bitstreams made available at set times; television becomes a screen mode and channels will just be brands. Newspapers will be for the elite only with digital paper for the masses.

Story 5: in the arts we might challenge the primacy of physical presence: why only have one print of an image? Why have an audience for a film show? Who needs galleries for digital artworks? We will need a new hierarchy of value where the 'live experience' may not be the Holy Grail.

In summary – we could say that it is likely that:

- The network will be omnipresent and invisible, in the West;
- Manhattan media workers will have their heads in the virtual space;
- Every village in India will have fast access;
- A child in sub-Saharan Africa will die of dehydration, with no Net access, no technology and little hope.

Hetan Shah – New Economics Foundation

Hetan presented his predictions as if retrospectively – the conceit being that he was addressing us from 2025 and talking about the ensuing years as if they were history. He felt that there were some things we could have predicted in 2005 (the rise of 'choice'; the explosion of 'ethical products'; the grey population and the 50-80 year old age group being the most economically active; China becoming the world's second largest economy; the world's population rising to 8.5 billion) but there are things that he felt we might not have been able to predict:

1. We could not have predicted the pro-globalisation process exhibited recently at the G10 summit. The anti-globalisation lobby used to be the radicals; after the US recession in 2007-12, the US government adopted the anti-globalisation rhetoric in order to meet their own agenda of closing down trade and protecting their own economy. This has left us with a situation where the new radicals are

now the globalisers with a similar set of arguments that the anti-globaliser lobby used to have.

2. We might not have predicted the fall of inequality: this came from the collapse of the property market; the US recession; the massive Olympic debt which lumbered the fourth labour government (and in any case, extraordinarily, social mobility had actually fallen in the first few terms of the labour government); the intelligentsia had already spotted that inequality was likely to rise and began to focus on the Scandinavian economy to model itself on rather than the US.
3. Who could have predicted that happiness and well-being would be on the rise? It used to be accepted that if the economy grew, people would be able to buy things which would make them happy. But between 1975 and 2005 when the economy grew enormously, levels of happiness remained flat. The combined fall in social trust, and the rise of mental health problems led to happiness and well-being meaning, purpose and curiosity beginning to be measured. An added benefit of this is that happier people are more productive, which has contributed to the success of the 'buy back your time' legislation where if you choose to work three days instead of four, you can buy a day back from your employer
4. Our attitudes towards immigration are much more positive since the Institute of Fiscal Studies report showed the direct relationship between the number of extra years we would need to work beyond pensionable age in order for immigration to fall. Making this link between money and immigration has brought *The Sun* into line. We still do, however, need to address the issue of restricted citizenship rights which store up trouble for the future.
5. The rise of smarter government would have been difficult to predict. We're fairly used to stupid government – the ridiculous fiasco of the national ID Cards – which were actually cheaper to buy on the black market than through official means was a good example. But in recent years there has been a rise in holistic government, with a realisation that one intervention may hit a whole range of things. For example, now regeneration projects use local unemployed people to get them back into the working world; we build social and environmental measures into Government contracts (where as before they were based on 'Best Value' – i.e. the cheapest). In addition Government is now using psychological or behavioural economics to achieve a whole range of aims. For instance, it learned from the blood transfusions services in the UK and US (UK not paying, and US financially incentivising and as a result attracting 'bad' blood which cost

the service even more) that financial incentives don't always achieve the desired ends. One of the Government's smart moves is the use of 'defaults'. It used to be the people would have to opt-in to their company pension schemes; now people have to opt-out, which has led to a 40 per cent rise in people who stay with their company pension. And finally, there is the preventative health-care initiative which focuses on 0-3 year olds and which is starting to have very positive effects.

6. Developing countries have got wealthier despite our best efforts: we wouldn't let them trade, and we dumped our rubbish on them, but still they grow. Two things helped this. Firstly the distribution of mobile phones helped to create networks where people could, for example, phone local towns to find the price of a commodity so as not to be saddled with 'middle-man' prices; secondly the cure for AIDS, discovered in 2016 and put on the Internet and freely downloadable halted the drain of resources in that direction. Poverty and inequality, however, remain high.
7. The social economy is on the rise: who would have guessed that recycling and leisure facilities would be run by workers co-operatives, or that employment would have risen so massively in ethical careers. The Government now measures the household and social economies which comprise half the total economy.
8. The environment used to be seen as part of the economy, now we know that the economy is a subset of the environment. Who could believe that driving or flying used to be so cheap? In 2005 environment concerns were a fringe idea but change became endemic when the two degree rise in temperatures was topped; crop yields fell and forests started dying, but it was the runaway climate changes that made the real difference. The London flooding in 2018, lost Milliband the election and unbelievably the Tory party started repositioning themselves as the Green Party. Poor countries suing rich ones for ecological debt also contributed (although they didn't win). The fall in income tax and the rise of congestion and pollution taxes mean that taxation now focuses on penalties for 'bads' not 'goods'.

Andy Martin – Head of Leisure Research, MORI

Demographic and sociographic research identifies what people do and know, what their attitudes and values are, but it won't tell you what they are going to do.

There are three themes to my presentation today:

- Population profile
- Age profile
 - Ageing population
 - Quality time
- Other ways we're changing
 - Technology trends
 - Leisure trends

Population profile: every year since 1901 (except 1976) there have been more births than deaths in the UK. This is forecast to continue until the 2040s. Our population is growing by a quarter of a million annually and is in constant flux (over the decade to 2002, 3.9 million people entered the country as migrants and 2.8 million people left); 35 per cent of people in the U.K. think this is a bad thing. At the moment 1 in 12 people in the U.K. were not born in the country; by 2015 it will be 1 in 9 people.

People are moving out of London and 'downshifting', but possibly not moving far from London: the South East is now the third most populated region on earth.

The birth rate is around 1.74.

The implications of this for the arts are:

- In England particularly (Scotland's population is predicted to decrease) we have a growing population of people to appeal to;
- Out migrants tend to be our core arts audience which we need to replace;
- Immigrants are younger, foreign and don't want what we offer;
- The family structure and profile is shifting: many more single parents, non-conventional families and older people becoming parents for the first time, with fewer children per family.

Age Profile: The UK has an aging population; by 2031 there will be 4 million more people aged over 60 years old than under 20 years old. The average age will be 43 years old, and

there will be 15 million people of pensionable age (despite the increase in women's pensionable age). The number of people of working age will increase continually until 2022 (partly because of the pensionable age shift) from 36.8 million to 40 million after which it will start to decline. There is evidence that working people are now too busy to go to the arts (32 per cent stated that they were too busy when asked in 2004 why they had not visited a museum or art gallery in the last twelve months).

Life expectancy will increase to 81 for males and 85 for women by 2031. Although they will not necessarily conform to stereotypes, they have particular needs – tea instead of alcohol for example – and they will ultimately be dependent. They will have spent their money and will have no resources for when they are sick.

The implications of this changing age profile are:

- there will be more people of working age – but less time and more stressed;
- there will be people of working age supporting elderly relatives – less money and more stressed;
- the looming pensions crisis will have serious implications for everyone; more people will be working into their 60s and the current population of healthy, wealthy and time-rich individuals in their late 50s and early 60s will diminish – less time, less money and more stressed!
- people become significantly less active after the age of 70. We'll all be living for longer, but what will we be doing with our time?

Other ways we are changing: There is evidence of declining attendance at the arts, but 10 million people state that they haven't been and would like to: that is considerably better than casinos. In terms of tourism, day-visits are down 12 per cent in a decade. 80 per cent of the population now have mobile phones, and 60 per cent has access to digital services or the internet (and this is fairly representative of the population).

Implications of technology changes:

- We're instantly accessible at all times – we live life at full pelt, and expect things to run smoothly. Many will pay for this guarantee;
- We can dial up information about anything we're vaguely interested in at any time of the day or night. If the first Website we go to can't provide what we're looking for, we'll go immediately elsewhere, and might not ever go back.

- At present there are lots of new technology users who are coming to it late in life – for the time-being, your offer has to make things simple for them.

The overall conclusions from this research are:

- Britain's population is constantly shifting. What might be the perfect proposition one year can be irrelevant just a few short years later;
- Key issues to bear in mind over the next 20 years:
 - More elderly members of the population;
 - More people working longer hours;
 - Fewer kids;
 - More people moving here from overseas.
- Big shifts are occurring right under our noses – unless we keep an eye on the way the population is changing, we can easily find ourselves providing a service to a public who don't exist any more.

Gaby Hinsliff – The *Observer*

(Gaby was unable to attend the Symposium, but her paper was read out to delegates by Ivan Wadeson)

In 1985 Margaret Thatcher was at the height of her powers, the Berlin Wall hadn't yet fallen, the Internet was some mad glint in some geek's eye and Duran Duran were cool.

No-one then could have predicted the manner of Thatcher's downfall five years later, the rise of Al Qaeda or the invention of text messaging – all events that have revolutionised our lives. Unexpected events transform politics, and in a globalised world, shocks from thousands of miles away can drive events here: 9/11 was America's tragedy but it turned Tony Blair's second term from a parliament focused on public service delivery to a parliament obsessed with security at every level and triggered the event that has defined his leadership, the Iraq war.

So, I'm going to mirror what they do: I will try to sketch out what will characterise this unfolding parliament, about which we can make some predictions with confidence, and then what might happen beyond.

First the immediate future. This is an age of security politics, from terrorism to immigration to discipline in schools. When faced with a big, overarching threat, it is a natural reaction to

want to control the little threats too. You become less tolerant of the smaller things: crime, the threat on your street, but also of difference and discord generally. In such climates, the far right usually thrives: it has across Europe, from France to Holland and beyond, and probably the only reason the BNP didn't do better at the last election is because both mainstream parties were trying to outdo each other in sounding tough on immigration. So long as there are attacks on the West that mood will not lift.

We are also in an era of micropolitics. That phrase is sometimes used to mean the politics of the streets – not the big structural reforms, like changing the way the NHS works, but things such as how parents raise their children and whether you should be allowed to smoke in public places.

Micropoliticians are characterised by their interest in personal behaviour, or pavement politics as the Liberal Democrats have been calling it for years.

But micropolitics originally meant the process of detecting and countering resistance from often quite small interest groups. It's the opposite of Thatcherite conviction politics, where you decide what is right and then either convince or bulldoze everyone into it. As a result, they tend to preside over slow incremental change rather than 'big bangs'.

Tony Blair is a natural micropolitician: on domestic policies, his instinct is to reach consensus and to listen to what comes up on doorsteps and in focus groups, however trivial. On foreign policy, as in Iraq, it's a bit different, but this will probably be a micropolitical parliament.

But the politics of the personal will eventually reach its logical endpoint. An MP during the election had been knocking up known Labour supporters who hadn't voted. On polling day he spoke to a woman who said she wasn't going to vote because a hole in a fence opposite her house had been there a year. And he thought 'Oh bugger this: I know all politics is local, but somehow the pendulum has swung a bit too far.'

If Tony Blair is a micropolitician, Gordon Brown is instinctively macro. He operates by clique, imposing his will rather than seeking consensus: his frames of reference are global rather than local. And from perhaps 2008 to perhaps – who knows? – 2013, when the Tories certainly ought to be back in power, my guess is we will see a gradual shift back to macropolitics.

But enough of the big picture. The enormity of everything that will have changed in our lives by 2025 would take longer than 20 minutes, so I want to concentrate on three ideas. The first is social. By 2025, there will be more people aged over 65 than under 20, which means issues that normally affect the elderly, from pensions to the provision of long-term care and dying with dignity, will come centre stage. By 2020, a recent survey suggested, elder care will be a bigger issue than childcare and the needs of working mothers is today. After all, we won't all have kids, but we all, by definition, have parents.

If women's participation in the labour market continues to increase or even stays the same, we are also talking about a huge 'care gap'. Just as working women now pay other women to look after their children, those in full-time employment will have to find someone else to look after their parents. Carers UK, which represents unpaid carers for elderly or sick relatives, estimates that by 2037 we will need another nine million carers. Where are they all going to come from?

By 2025, I suspect we are going to be tackling childcare and elder care together. Not least because the increasing popularity of delaying having children until your thirties means many women are experiencing both dependent children and dependent parents at the same time. As for the financial impact of an ageing society, fewer adults of working, taxpaying age supporting ever more adults of retirement, pension-drawing age equals a lot fewer people contributing into the pot and a lot more taking money out.

Yet within this predominantly ageing society will be some pockets of youth. There is a predominantly younger age profile among the immigrant community compared to the indigenous community. What contribution will that make to existing tensions between the two?

The second influence is advances in genetics. We have already mapped the human genome, but we're only paddling in the shallows of what genetic science will offer in years to come.

By 2015, we will start to see workable gene therapies on the market. Therapeutic cloning – the creation of spare parts grown from a patient's cloned cell, which could be transplanted back into the sick individual – is on roughly the same timescale. These treatments are aimed at the diseases that will be our biggest problem by 2025 like Parkinson's or Alzheimer's. Put bluntly, as life expectancy rises and our ability to survive heart diseases and cancer increases, we're going to die of other things instead: chronic diseases of the elderly. But these therapies will also bring enormous ethical difficulties, and present huge demands on the NHS.

Even if the Government decides not to offer many tests on the NHS, somebody will offer them for a price: and then people will want to know what the NHS is going to do for them. How does the NHS deal with the demand? How much are we prepared to pay for?

Once we have that knowledge, too, we will fight over who uses it. Currently there is a voluntary moratorium on the use of genetic test results by insurers and employers. If it's lifted, what will be the impact on people whose tests suggest they're likely to die young, or need a lot of time off sick? Will they still be able to get mortgages, or jobs?

We have isolated mainly single-effect genes (such as the one for breast cancer) with simple cause and effect relationships. It doesn't mean you are 100 per cent certain to get it, but that

you are more likely than most, and so you should have regular tests from a young age to catch it early.

But what about some of the more complex genes, whose influence might be milder and harder to determine, but which impact on behaviour? What if we were able to isolate a gene for criminality, or for alcoholism, or for risk-taking behaviour? Would genetic inheritance become an admissible defence in court? Would we be justified in testing pre-school children for these genes, and intervening with those we think are likely to be at risk? And given the US president already has a yearly medical whose results are published will we start asking for the genetic test results of those who aim for the highest office in the UK?

This may seem far-fetched, but some US courts have heard defences citing neurological evidence suggesting some people are either born with, or at least rapidly evolve, psychopathic tendencies. It hasn't succeeded yet as a defence. But as medical advances continue who's to say it won't? These are all going to be live issues for our Government of 2025.

My final issue is an economic one. Chevron, the giant petroleum company launched an ad campaign earlier this month saying the world is going to run out of fossil fuels soon, please join in a conversation with us about what should be done. By 2025 it will be a major issue. In Britain, we hit peak production in the North Sea in 1999: oil revenues have been going down since. Worldwide, the Treasury thinks we'll hit peak production about 2030 but some experts think it could be at least ten years sooner. It doesn't mean we'll run out of oil in 2030, but it does mean that oil will be scarcer and therefore more expensive. And that matters because our prosperity is founded on oil. It runs our cars, factories, mass transport systems, businesses. We might have wind farms, but we are in no position to do without oil. The markets will start to respond to the crisis of peak production before it happens, so by 2025, we might be in the eye of the storm: at the very least, the Government will be engaged in a massive effort to persuade us to use alternatives to petrol-fuelled cars, planes and trains. If we could become less dependent on oil, we could not only save ourselves from economic disaster but from an ecological crisis. There's a report out shortly from one leading think-tank entitled, *Is climate change more of a threat than terrorism?* Climate change might just kill more of us than Al Qaeda, given the thousands of deaths attributed across Europe to the last hot summer, in 2003.

Even if we stopped emitting greenhouse gases tomorrow, we would still have done enough damage to experience global warming for the next thirty years. The freak weather we have seen this year would be only the start. And there would be knock on effects around the world; it will be the developing countries of Africa and Asia who are worst hit and least able to cope.

Droughts could start to create or inflame conflicts, as in Sudan. If people's water supplies dry up, and their land becomes infertile, they will naturally move towards the remaining fertile ground, prompting territorial conflicts.

So if these are some of the problems our Government of 2025 will face, how they might cope?

I'm not going to try and predict who will be prime minister. I think some of the more optimistic New Labour forecasts of a 50-year Reich for Blairism are rather unlikely. Most Labour MPs expect Gordon Brown to follow Tony Blair and then win the 2009 election, albeit narrowly, on the grounds that he is at least a change of face; and then, probably, to lose office around 2013. Whether the Tories are then able to challenge him depends on a lot of unknowables: who the Tories choose as their new leader, how Brown does in office.

But if the Tories don't come back in 2013, interesting possibilities emerge. To have lost five elections in a row would leave the party effectively no longer a going concern. The possibility of a radical reshaping of the body politic along new lines – maybe even a broadly libertarian party comprising the sort of David Davis anti-ID card wing of the Tories, plus most Liberal Democrats and some enterprising Labour types, versus a broadly authoritarian party comprising some New Labour stalwarts plus the more old-fashioned, patrician Tory wing – is interesting.

Another scenario is the genuine establishment of three-party politics: already in 2005, you could see the Tories and Labour struggling to adapt to fighting the Liberal Democrats as well as each other. It isn't a two horse race any more.

But I would leave you with one more radical thought. We are currently entering an era of non-political politics. Jamie Oliver's campaign on school dinners was probably the single most potent political act of the last two years, and he's a TV chef, not a politician. The Make Poverty History campaign may have attracted both Blair and Brown on board, but it didn't start with them: it was Bob Geldof, Bono and the grass roots who were most important. People who wore white wristbands for MPH or who signed Jamie's online petition against turkey twizzlers were not necessarily members of any political party or even vote at the general election. But when it mattered to them, they got involved. The future of political parties will be how people group around these kind of ad hoc, informal groupings on an issue.

Electoral turnout rose a bit in 2005, but the trend is down: most worryingly, while young people have always been worse at voting than pensioners, we are now seeing that non-voting habit formed in the teens carried over into well into their late twenties. What if by 2025, when that non-voting generation is in their mid-40s, they are still not going to the polls?

What if, by then, turnout is less than 50 per cent – is a government elected like that even legitimate?

Membership of all three main political parties is declining. I think the future will not be about direct membership but about a sort of looser, informal support network where parties say lend us your support on this one issue that you have brought up - maybe for this election, or for the next year – and then we won't ask anything more from you. Parties that learn how to do this will be in pole position by 2025.

And so, probably, will institutions. We have to get used to a more volatile consumer-led environment where people don't just vote the way they always have; where people don't just buy the newspaper they've always read; where they don't watch the same TV programmes, go to the same places or buy the same soap powder out of habit. Which is a sobering reflection for us all.

Breakout Sessions*Discussion Seminars***Hetan Shah****Q: Fred Moroni – Malvern Theatre**

How far will what you are suggesting require a big shake-up and how far will it be by degrees?

A: Hetan Shah

First to say that much of what I was saying, I don't really believe. I'm a lot more pessimistic than that and extrapolation from now is a depressing prospect. What I do believe is that changes will not come from party politics.

Q: James Gough – AMH

I'm interested in the notion of personal identity. We used to have the idea that people would define themselves as classical music attenders. We now think of ourselves as individuals but marketers deal with segments and trends.

A: Hetan Shah

Certainly. This is precisely the difficulty that comes with diversity.

Q: Kirsty Brackenridge – MOMA Oxford

Is it for us to be more explicit about our politics and our civic role? To politicise what we do? Perhaps we should be talking about global warming and architecture.

C: Kate Carreno – Sainsbury's Centre

In as far as we are the civic community spaces of the future. We are also good at being passionate about what we do so we can open up debates.

A: Hetan Shah

We are trying to drag people from the entertainments end of the spectrum to the high art end – it is difficult but in a way I disagree with Bill about this – I think ultimately that people's concern with their well-being will draw people to the arts.

Q: Jennie Jordan - Freelance

Leicester will have a greater immigrant population than non-immigrant in the next couple of years. How will this affect our jobs? How can we lead people into Western classical music?

A: Hetan Shah

The art will emerge from the community – we may not need to provide it. I think the solution is to provide common spaces and invite people in to do stuff.

Q: Julie Tait – GGA

I'm interested in the psychological models you were mentioning.

A: Hetan Shah

Economists think people are simple. They respond to money, but the psychologists are gradually climbing on board and many economists are adopting their principles. However, if you want to speak to the treasury you need to speak in pounds. Well-being is a currency and it has economic effects, for example, of the 25 per cent of happiest novitiate nuns, 75 per cent are still alive 70 years later whereas of the 25 per cent of the most miserable novitiate nuns, only 25 per cent are alive 70 years later. Do you see what I mean?

Q: Kate Carreno

How do we present ourselves to the Government? I take your point about percentages and monetary value but it won't make a difference – however I believe stories will. We need to learn how to tell stories.

A: Hetan Shah

You should be doing both, and someone needs to co-ordinate a strategy.

C: Ann Kellaway – Arts Council of Wales

Help us to do that.

Andy Martin**Q: Avril Scott**

With things changing so rapidly, we have to make tactical changes in adapting our marketing for the future, for example considering the point size in a brochure, but I wonder to what extent we have yet started thinking about the *strategic* changes.

C: Emily Till, Sage Gateshead

I think we need to start being less negative about having a 'grey audience', stop stigmatising them and start welcoming them instead.

Q: Heather Maitland – Freelance

Where does this negative image come from?

A: Matthew Carwardine-Palmer, Bristol Old Vic

Funding stigmatises the older segment of the audience, by so frequently trying to push for better statistics on the under-26 segment.

We need to ask the question of what will make current 40-somethings suddenly turn to classical music, in other words to consider what the future grey demand will be like.

There is also the notion that you develop lifelong habits in your 20s, which explains the importance of 'getting them young'.

C: Andy Martin

Is it too late to attract people if you miss them in their 20s? It's my opinion that you see, to some extent, the age-cohort effect. Younger people will adapt their behaviour as they age, picking some traits from previous generations; there's no evidence that I know of that says you must get them early.

A: Rachel Kelnar, Henley Centre

In our work in the private sector it is absolutely the pattern that brands such as Nike, Cadburys and so on recognise the importance of 'getting them young'.

C: Orian Brook, Audiences London

Andy mentioned that figure of 20 per cent of those surveyed in the market research he was discussing, who want to attend but so far never have. Isn't it the case that those people, as

they get older, will have the time and the opportunity to become attendees? Also, I think it's important to note that since six years ago, according to Andy's figures, there has been a *drop* in the number of people that don't go because there's nothing to see that interests them.

C: Sarah Jervis, Oxford Playhouse

Databases also have codes to record the level of interest – but I'm sure if you went through them there would be a large number of people who said they like opera, but still have never attended a single one.

The current pattern seems to be that you do 'get got' when you are younger – at school, for example, on school trips to the theatre and so on – and then people stop for around 20 years until they start going back again.

A: Andy Martin

Precisely – people drift into things, getting introduced to the theatre and so on by friends. When we measured museum visiting, the attendance is higher in 2004 than in 1994, but people are going for the same things, with the same average frequency and the same level of interest as before.

Q:

To what extent can we believe in the truthfulness of replies to questions about interest? It seems there's a tendency to feel that you *should* be interested in opera.

A: Andy Martin

Certainly, people fib. The only thing I can think of is to ask the question, 'To what extent are you likely to go to the opera?' and then ask, 'No, honestly! How likely are you really to go?'

If a response comes back as saying that person is certain to go, we'd probably count that, whereas if they say they are 'likely' to go, that would probably be excluded.

A: Heather Maitland - Freelance

On the matter of being 'too busy' to go to shows, research in Scotland recently has shown that in the under-35s age group, the biggest barrier to going to an arts event is the fact that it ties you to being in a specific place at a specific time.

Q: Pam Pfrommer – Freelance

We know that around 70 per cent of attendees only come the once. What are the implications of this? Are audiences simply not getting what they want?

A: Andy Martin

People tend to go to a museum to see a specific exhibition, and the nature of these exhibitions is that they don't change frequently enough to encourage people to return. So, whereas people will return to Thorpe Park because each time the rides will give you a different experience, the same won't happen at London Zoo, where it's always the same lion. So the message is, static displays imply less patron frequency.

Q: Avril Scott - Freelance

How do you think the surveying, the methods of carrying out research, should change?

A: Andy Martin

Surveying methods are changing already. For example, there are already a lot fewer people with clipboards hanging around on street corners. Research tends now to be carried out a lot more by telephone, or even online, which makes a lot of it more 'opt-in' rather than opt-out, allowing people to participate in research about things they are interested in.

Q:

Returning to the question of 'getting them young', I think there is often a perception that once through the doors, people will meet snobbery in terms of their age or class, giving them the sense that, for example, 'opera is not for me'.

We also need to take into account the changing consumption patterns in younger people: going to a performance is so often a relatively passive experience, and we need to start thinking of ways to make that experience more active.

C: Adrian Davis

I'm interested to think about what the ethnic mix of the UK will be in 2025, and would suggest that we may have a different, European audience in 20 years time. We need to map what this audience will be.

A: Andy Martin

Certainly, our population is in a state of constant flux. For this reason, we need to consider how to sell an institution to an audience that won't necessarily have heard of it before – so whereas we take for granted that many people have heard of the RSC now, this may change in the future and we will need to think about marketing it from scratch.

In terms of mapping what the future audience by ethnic mix might be, we could do a simple analysis of the population by ethnic group by age, to predict the possible proportion of ethnic groups in the future. However, this fails to take into account migration – something very much dependent upon the economy.

C: Rachel Kelnar – Henley Centre

The ethnic make-up of those people putting on productions will also change – the type of production will probably change in the future, not just the audience.

Q: Heather Maitland – Freelance

So, to come back to that 20 per cent of respondents who claimed some latent interest in the arts, how are we to work on this segment?

C: Mary Butlin - RSC

One of the problems with the arts is building awareness. In cinema, for example, there are constant adverts reminding us of new films – the marketing is refreshing and different and keeps on changing. This sort of awareness is hard to achieve in the arts.

C:

But the arts aren't as flexible as cinema – you can see a film up to five times a day in some cinemas. What is interesting is why people don't go. We should look at different ways of programming in order to make the arts more accessible to people with busy lifestyles.

It is a question of finding out what that 20 per cent want and responding to their needs.

Q: Andy Martin

This brings us back to the question of how research can change. Currently we work by saying, 'We have "x" to offer you, how can we persuade you to attend?' Perhaps we need to change this, to asking instead, 'What can we show that you want to see?'

A: John Haywood - NPG

Yes. When people say 'I'm too busy' what they are really saying is 'Make it worth my while'. We need to represent what we do better, to convince people of the time-value.

C: Sarah Jarvis – Oxford Playhouse

In order to provide a better offering, it's not just down to venues, programmers and so on. We need support from the industry as a whole, for example from Equity. At the moment, the

reason we can't put on as many performances as are needed to provide flexibility is because of the cost. The whole industry needs to work together on this for it to work.

C: Sally Wilson – Wee Stories

In Scotland, some recent research has been carried out using focus groups about marketing media, for example online marketing and so on. We targeted family audiences, and the results were a call for a return to paper advertising. Parents prefer receiving leaflets in the post – the children can go away and cut bits out and so on, and it also means that children spend less time on the computer than they would if all of the information could only be accessed online.

Q: Kathleen Towler – British Film Institute

In one of Thursday's sessions, it was mentioned that you can't research programming, as people don't know what they want. What are your thoughts?

A: Andy Martin

It's true that programming is researched very little – it's hard to produce questionnaires that provide enough information for respondents to make a sensible comment.

C:

Currently, people will travel to see arts events, so we talk about international competition to an extent. With the predictions of fuel prices to 2025, however, travel may become a thing of the past.

C: Rachel Kelnar – Henley Centre

I agree – every current DTI planning scenario excludes low-cost airlines.

A: Mary Butlin - RSC

In response to the question about researching programming, it's important to see how research can be used in measuring the response to certain concepts, and measuring what turns the audience on. Scenarios can be tested in order to understand audience reaction.

A: Fiona Sturgeon – Scottish Arts Council

Working on a youth health project for the NHS, we had the luxury of being able to test on children, and tried out five or six humour campaigns we were planning to run. The kids

simply didn't get most of it, they didn't find it funny at all, so we threw out around 90per cent of what we'd planned. This approach was time-consuming but not costly.

Q: Heather Maitland - Freelance

Is there difficulty in getting the creative people in an arts organisation to be open to market research input?

A: Andy Martin

In some research last year, curators of a museum took part in an experiment where they were watched by members of the public as they put an exhibition together. The visitors then had the opportunity to say what they thought of the curators' decisions. Though the curators were scared by the thought of it beforehand, afterwards they were fascinated by the experience. This is an example of the need to force yourself to interact with your audience.

Q: Rachel Kelnar – Henley Centre

Returning to the question of researching for programming, this is something reflected in the US, where politicians use opinion polls to determine what they will say in their speeches. This poses an obvious problem: should politics/art not be about having a vision and then testing it, rather than compromising that vision by testing the audience in advance?

Q:

Is it possible to measure the social impact of the arts?

A: Andy Martin

The cost of measuring it is massive, making it a virtually pointless task.

A: Mary Butlin - RSC

But you could build in questions about whether people feel inspired – for example, whether they then go home and paint with their children and so on.

C: Lee Rotbart – London Calling

But a lot of people go to the theatre so that they can say, for example, that they've gone to see some Shakespeare. There's an expectation that you *have* to feel inspired.

A: Andy Martin

In a survey carried out for the MLA, we included questions about whether people felt inspired or not, and asked 70,000 people. From the responses you can measure the relative impact of the arts in different areas.

C: Rachel Kelnar- Henley Centre

To make an analogy with the sporting world, we've all heard dozens of times the notion that the 2012 Olympics will reduce obesity.

A: Andy Martin

Everyone is struggling with the same issues – in sports and in the arts. We carried out some research in Manchester after the Commonwealth Games there to try to measure how inspired people felt to do sport.

A major difference of course is the vast amounts of money Sports England have to spend. For example, at the moment they're considering carrying out 1,000 interviews at every Local Authority in the country to measure the impact of sport at a local level.

Q: Heather Maitland - Freelance

To move on to the point raised by Andy in the keynote presentation about the changing structure of the family, how are we shifting our ideas to meet the demands of the 1.74-child family?

A: Chris Hill - RSC

We've made the family scheme more flexible, so now every full price adult ticket comes with the offer of up to four half-price children's seats.

Q: Heather Maitland - Freelance

If arts marketing was given a big birthday present of cash, where should we be focusing our research spending?

A: Andy Martin

There are three broad segments of the market – some people will reject everything you offer them, some will come regardless of what you offer, and then there is that 20 per cent who might allow themselves to be interested. It's that 20 per cent you need to focus on, to find out what would really interest them.

Bill Thompson

Unfortunately the discussion seminar led by Bill Thompson did not record and is therefore not available here. There will be a feature in the 2006 issue of the *Journal of Arts Marketing (JAM)* in which Bill will present some thoughts and ideas on technology and the future of the arts.

Building the Road Map

Workshop Briefing

Gill Ringland – SAMI Consulting

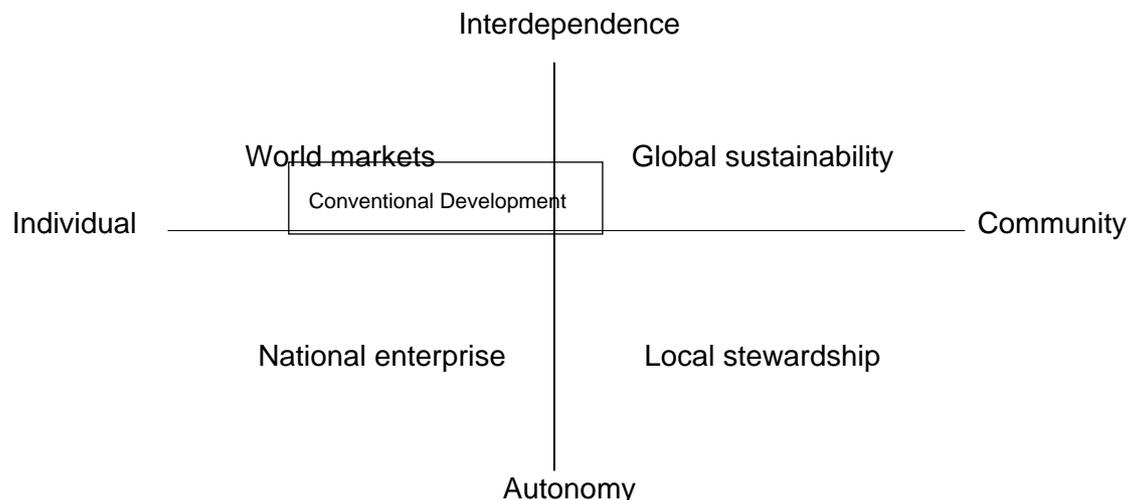
Gill Ringland introduced the workshop sessions and briefed the delegates on their task for the afternoon. The task was to integrate the two sessions *Visioning Utopia* and *Informing the Road Map* by exploring scenarios for the arts for 2025 in which we can create views of desirable and undesirable futures. The task was to brainstorm ideas for getting to 2025, to write up the outputs and create task-forces and action plans to progress the ideas.

She described what a 'scenario' is:

- 'an internally consistent view of what the future might be';
- 'not a forecast but one possible future outcome'¹

Scenarios are used for visioning, strategy development, portfolio management and planning, and unlike forecasting, are a way of exploring possible directions rather than trying to predict a single path.

The scenarios for the UK are manifold but in this exercise are described in the following matrix:



If the UK moves into the World Markets quadrant the following would be the characteristics of society:

- People aspire to independence, wealth, mobility;

¹ Professor Michael Porter, Harvard, 1985

- Global markets presumed best to deliver;
- Internationally co-ordinated policies;
- Minimal government;
- Rights of individuals to freedoms enshrined in law;
- Some rise in private sector arts funding, with some reduction in public sector. In this scenario the arts would not be widely perceived as high value.

This is the tendency of the UK at present.

An exploration of a move towards Global Sustainability would manifest the following characteristics:

- People aspire to high levels of welfare, more equally distributed opportunities, sound environment;
- Active public policy within EU and globally to deliver;
- Social objectives met through public provision, at international level;
- Regulatory and norm-based mechanisms to control markets and people;
- In this scenario we would see UK and EU public sector funding for the arts, and the art would be seen as a social good.

National Enterprise:

- People aspire to personal independence and wealth within a national cultural identity;
- Liberalised markets and national security and resilience believed best to deliver;
- Political and cultural institutions strengthened;
- World becomes more fragmented;
- Private sector funding of the arts backs up public sector funding and there is wide interest in the arts.

And finally Local Stewardship:

- People aspire to sustainable welfare in networked communities;
- Markets subject to social regulation;
- Active public policy promotes small scale and constrains large scale;

- Local communities strengthened;
- Wide interest in participative arts but less UK, EU or private sector funding.

The schedule for the workshop was as follows:

14:00 Introduction

14:30 Groups

- Discuss what is desirable view of 2025, which scenario fits most closely, position of the arts in UK;
- What is undesirable, which scenario fits most closely, position of arts in the UK;
- Capture 4 or 5 highlights of the desirable and undesirable on the flip chart.

15:15 Discussion moves on to

- What are the blue sky ideas for reaching 2025 (why, who, what, when, how e.g. who with);
- What are the obvious steps no matter what (green);
- Capture using blue and green pens.

16:00 Break

16:30 Plenary - chairman presents

- Major opportunities;
- Major threats;
- 3 big ideas (blue);
- 3 big ideas (green);
- Discussion – focus around who the AMA could work with to achieve its desirable 2025.

Plenary Presentation: A Road Map to Utopia

The following is a summary of the scenario workshop feedback:

Desirable futures:

- Arts are an integral part of everyday life: and they can challenge;
- Cultural 'Olympic' ideal:
 - expressing national identity through the arts;
 - understanding the role of arts in society;
 - enabling a communal cultural experience;
 - striving to achieve excellence;
 - competitive in the best sense.
- Better dialogue between arts, the community and the politicians;
- Increased choice and access; and diversity, replenishment of audiences;
- Coping with change and being flexible: by us taking responsibility for the dialogue between funders, audiences and artists/organisations.

Undesirable futures:

- Government or corporate control of the arts through funding;
- Loss of ownership by artists (particularly an issue with Open Source);
- People excluded from the arts;
- Things stay the same;
- The total collapse of public funding – only commercially viable art survives; (NB this was qualified as many in the room felt that partial dismantling of public funding could be a good thing);
- Arts professionals can't meet changes in public expectations – so that the public don't get a better experience by going out to an event.

Blue-sky ideas:

- Olympics for the arts: envisioned as a celebration on a similar scale to the sporting Olympics as it would aid regeneration. The jury is out pending the Glasgow Capital of Culture long-term impact study;
- Much of 'arts' is in fact heritage – get it funded as such: it potentially makes the funding system more complicated but it allows people to do what they are best at, and it saves and preserves art;
- Arts superbrand; 'experience the live': delegates were pointed to the AMA commissioned paper on whether or not to brand the arts on the AMA Website. The arguments for and against branding the arts are explained and delegates are asked to participate in the debate;
- Arts happening everywhere 'lift art';
- Restructure the funding model to leave artists/organisations and people free to relate to each other without the interference of government;
- Challenge the complacent view that 'art is good';
- Use lottery tickets to incentivise attendance;
- Long term planning for the arts;
- Refine 'arts' terminology so that it speaks to real people;
- Wrest organisational control from artistic directors so that entrepreneurs run organisations.

'Go do it' ideas:

- Improve distribution of excellent work;
- Bench-marking against other sectors;
- Arts education champion e.g. Jamie Oliver;
- Categorise based on what people actually do;
- Understand our communities better;
- Campaign to:
 - Change tax laws;
 - Arts presence/voice at e.g. Olympics;
 - Attitudinal change;

– Case for intrinsic value of arts.

Delegates were asked to vote on the ideas which they felt were most pertinent and most actionable. The six ideas that received the most votes were:

- Arts super-brand;
- Long term planning;
- Arts everywhere: 'Lift art';
- Challenge the view that art is good;
- Arts education champions;
- Campaigning.

Speaker Biographies

Gaby Hinsliff has been political editor of *The Observer* since November 2004, and has worked for the paper for five years. She started out in newspapers as a reporter on the *Grimsby Evening Telegraph*, moving on to the *Daily Mail* where she was first health reporter and then political correspondent from 1997 to 2000. She then left to join *The Observer* as chief political correspondent. In 2001, jointly with colleague Antony Barnett, she won the *What the Papers Say* Scoop of the Year award, for a story about Peter Mandelson and the Hinduja brothers which led to Mr. Mandelson's second resignation from the Cabinet. As well as her work for *The Observer*, she is a regular guest political commentator on television, and has recently contributed to programmes from ITV's *The Jonathan Dimbleby Programme* to Channel Five's *The Wright Stuff*. She also sits on a steering group for the Charity 4Children, and speaks on politics to audiences ranging recently from an Electoral Commission seminar on the last general election, to the Top Management Programme for senior civil servants.

Andy Martin is a research director at MORI, and heads up the leisure and travel practice. Andy has been with MORI for nine years, having previously worked in a number of leading leisure organisations, and graduated from Birmingham University with a Masters degree in tourism policy and management. He is a frequent speaker at conferences on such varied topics as the senior market for leisure, the future for the health and fitness market, and trends in tourism bookings. Although MORI is perhaps best known for its political polling, this represents just a fraction of its turnover. In the cultural sector, MORI works with a wide cross section of organisations, including the Royal Academy, the V&A, Tate, Whitechapel Art Gallery, English Heritage and London Zoo, on the attractions front, and others such as the MLA, Society of London Theatre, and DCMS.

Gill Ringland has written and consulted widely as fellow and chief executive of St Andrews Management Institute (SAMI) on using scenarios to make more resilient management decisions since 2002. Her books are 'why, what, when, how' guides to the use of scenarios for making choices: *Scenario Planning – Managing for the Future* (John Wiley 1997); *Scenarios in Business* (John Wiley, 2002); *Scenarios in Public Policy* (John Wiley, 2002). After research at the University of California, Berkeley and as a fellow at Somerville College, Oxford, she joined CAP (now SEMA), then Inmos, process control company Modcomp, and then ICL. At ICL she was responsible for building a £3billion new business based on

Officepower over five years. She started to use scenario planning when responsible for strategy at ICL, and as a result wrote the amazon.com bestseller *Scenario Planning*. She is a past member of SRC's Computing Science Committee and of the Council of the Economic and Social Research Council. She is a court assistant of the Information Technologists Livery Company, an ICL fellow emeritus, a fellow of the British Computer Society and graduate of Stanford's Senior Executive Programme.

Hetan Shah is director of the new economics programme at nef (the new economics foundation) – a think tank in London which works to create a just and sustainable economy. The new economics programme focuses upon alternative theoretical economics, projects on well-being, and work on new ways of measuring what really matters. Hetan has a particular interest in looking at what policy would look like if well-being were its aim and is the co-author of *A well-being manifesto for a flourishing society*. Other recent projects have included investigating the implications of 'bounded rationality' for policy making and work on new measurement tools for social enterprise. Hetan is also a director of Social Enterprise Partnership, an umbrella of social enterprise support organisations. Hetan has a degree in philosophy, politics and economics from the University of Oxford. He also has a Masters degree in contemporary history and politics, and a postgraduate certificate in economics, both from Birkbeck College, University of London. His research interests include alternative economics, creativity, systems thinking and political philosophy. Before working for nef, he was a lawyer in the City. Hetan was born in, and lives in, East London.

Bill Thompson is a new media pioneer and has been working in, on and around the Internet since 1984. Formerly head of new media at Guardian newspapers, he writes a weekly column, the BillBlog, for BBC news online and a monthly feature for new users for BBC Webwise. He contributes to other publications both on and off-line including *The Register*, *The New Statesman* and *The Guardian*. He appears weekly on *Go Digital* on the BBC World Service and occasionally on other BBC radio and television programmes. Bill is a visiting lecturer at City University where he teaches online journalism in the journalism department. He is an external editor for openDemocracy.net, a research associate for The Work Foundation's iSociety research programme and a member of the ippr Digital Manifesto advisory group. He used to edit the regional arts board website, and worked on *Arts Professional* online.

Delegate List

Alain	Airth	AKA
Nadine	Andrews	Arts About Manchester
Josie	Aston	Arts and Health Consultant
Jo	Aujla	Guardian Media Group
Tim	Baker	Baker Richards Consulting
Richard	Baker	Edinburgh International Film Festival
Jacqueline	Barsoux	Barbican Centre
Sarah	Bedell	Aspirational Arts Partnerships
Ellie	Beedham	LABAN
Haidee	Bell	ABL Cultural Consulting
Kate	Bines	Victoria and Albert Museum
Alice	Black	Imperial War Museum
Richard	Bliss	Northern Stage
Sarah	Boiling	Freelance Consultant
Kirsty	Brackenridge	Modern Art Oxford
Carole	Britten	Brighton Festival & Dome
Orian	Brook	Audiences London
Helen	Burgun	Barbican Centre
Barry	Burke	Theatre Royal Stratford East
Mary	Butlin	Royal Shakespeare Company
Karen	Cardy	London Symphony Orchestra
Kate	Carreno	Sainsbury Centre for Visual Arts
Matthew	Carwardine-Palmer	Bristol Old Vic
Jane	Coe	Barbican Centre
Emma	Clements	Impact Distribution & Marketing
Kieran	Cooper	Catalyst Arts
Felix	Cross	Nitro
Adrian	Davies	SAMI Consulting
Louisa	Davison	Secret Agent Marketing
Chris	Denton	Barbican Centre
Jo	Dereza	Exeter Phoenix
David	Dodd	Barbican Centre

Jane	Donald	The Glasgow Royal Concert Hall
Kirsty	Doubleday	Dewynters Plc
Simon	Drysdale	The Glasgow Royal Concert Hall
Anna	Dunne	Audiences Yorkshire
Helen	Dunnett	Royal Liverpool Philharmonic Orchestra
Julie	Eaglen	Arts Council England
Alison	Finn	Birmingham Repertory Theatre
Mark	Finney	Guardian Media Group
Colin	Fletcher	SAMI Consulting
Cathy	Gallagher	The Cogency
Sarah	Gee	City of Birmingham Symphony Orchestra
Jacqui	Gellman	Dance Umbrella
Jennie	Gentles	The Drum
Gordon	Glass	The Junction
Jonathan	Goodacre	momentum arts
James	Gough	amh
Steven	Hadley	Audiences NI
Adrienne	Hall	Beerstecher Hall Consulting Ltd.
Rachel	Harrison	Audiences Central
Chris	Harper	National Theatre
John	Haywood	National Portrait Gallery
Mark	Hazell	Norwich Theatre Royal
Roland	Henry	London Calling Arts
Andrew	Higgins	English Touring Opera
Chris	Hill	Royal Shakespeare Company
Gaby	Hinsliff	The Observer
Derek	Hobbs FIDM	Valleys Arts Marketing
Zol	Hoffmann	Impact Distribution & Marketing
Jane	Hogg	RGA
David	Holland	National Campaign for the Arts
Catherine	Hume	Smart Audiences
Sarah	Hunt	National Theatre
Jeni	Iannetta	Dundee Contemporary Arts
Gill	Jaggers	Pegasus Theatre
Mike	James	Unity Theatre

Ben	Jeffries	Arts Council England
Sarah	Jervis	The Oxford Playhouse
Gill	Johnson	Arts Council England
Andrea	Jones	London Calling Arts
Millicent	Jones	Royal Liverpool Philharmonic Orchestra
Jennie	Jordan	Freelance Consultant
Ann	Kellaway	The Arts Council Of Wales
Rachel	Kelnar	The Henley Centre
Shirley	Kirk	South West Arts Marketing
Stuart	Leeks	Opera North
Jo	Lock	North Devon Theatres Trust
Frances	Longley	mac
Adam	Lumb	Sheffield Galleries and Museums Trust
Jane	Macpherson	The Lowry
Heather	Maitland	Freelance Consultant
Joanna	Margetts	Cardiff Arts Marketing
Emma	Marlow	Barbican Centre
Andy	Martin	MORI
Brian	McAteer	Assembly Hall Theatre
Andrew	McIntyre	Morris Hargreaves McIntyre
Rosie	Millard	New Statesman
Penny	Mills	Royal Court Theatre
Debora	Mo	Consultant
Andrew	Moir	London Calling Arts
Julia	Moir-Jones	London Calling Arts
Ann	Monfries	Scottish Chamber Orchestra
Abigail	Moore	John Good Holbrook
Fred	Moroni	Malvern Theatres
Dave	Moutrey	Cornerhouse
Andrew	Muir	Audiences NI
Rita	Mulvey	The Lowry
John	Nicholls	London Calling Arts
Frederica	Notley	Gardner Arts Centre
Sarah	Ogle	Liverpool Everyman & Playhouse
Lisa	Owen-Jones	BBC Concert Orchestra

Harriet	Paul	London Calling Arts
Julia	Payne	The Hub
Pamela	Pfrommer	Anglia Polytechnic University
Sara	Phillips	momentum arts
Antony	Pickthall	Centre for Performance Research (CPR)
David	Popple	Stamford Arts Centre
Adrienne	Pye	amh
Howard	Raynor	Bridgewater Hall and Urbis
David	Richmond	Art & Power
Gill	Ringland	SAMI Consulting
Lee	Rotbart	London Calling Arts
Susan	Royce	Freelance Consultant
Andy	Ryans	Halle
Kate	Sanderson	West Yorkshire Playhouse
Jonathan	Saville	Royal Centre Nottingham
Avril	Scott	Strategic Marketing & Business Development Consultant
Hetan	Shah	NEF
Tom	Shakespeare	Arts Council England
Jessica	Silvester	Royal Albert Hall
Kate	Smith	South West Arts Marketing
Janet	Smith	Blackwood Miners Institute
Paul	Smith	Guardian Media Group
Dr Oliver	Sparrow	SAMI Consulting
Rachel	Stafford	mac
Ruth	Staple	South West Arts Marketing
Fiona	Sturgeon	Scottish Arts Council
Julie	Tait	Glasgow Grows Audiences Ltd
William	Tayleur	Business Of Culture Ltd
Alex	Taylor	Arts Council England
Jo	Taylor	Welsh National Opera
Bill	Thompson	New media pioneer
Vanessa	Thorpe	The Observer
Emily	Till	The Sage Gateshead
Victoria	Todd	National Campaign for the Arts
Roger	Tomlinson	ACT Consultant Services

Anne	Torreggiani	Audiences London
Kathleen	Towler	British Film Institute
Sir John	Tusa	Barbican Centre
Jenny	Vobe	Cardiff Arts Marketing
Ivan	Wadeson	Arts About Manchester
Fiona	Wallace	Derby Playhouse
Ian	Whitaker	Young Vic Theatre Company
Kate	White	The Courtyard
Janice	White	The Cogency
Ian	Whiteside	University Of Salford
Stephen	Whittle	Gallery Oldham
Elwyn	Williams	Theatr Genedlaethol Cymru
Andrew	Willshire	Horniman Museum & Gardens
Sally	Wilson	Wee Stories
Elaine	Wilson	Audiences North East
Tim	Wood	The Place
Sarah	Woods	Royal Albert Hall
Victoria	Young	MA Arts Policy