

North Berwick Arts Centre Steering Group



North Berwick Arts Centre Feasibility Study

Final Report



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E.0 EXECUTIVE SUMMARY

E.1 Introduction

This study considers the feasibility of developing a purpose-built arts venue in North Berwick, as despite its flourishing and vibrant arts community, it has no dedicated arts venue. It is the vision of the North Berwick Arts Centre Steering Group (NBACSG) to create an inspiring and exciting purpose built Arts Centre in North Berwick offering a vibrant hub of performance creativity and learning that will appeal to locals and visitors alike. The Centre could provide a focus for arts provision in the East of the county, where there are issues with access to existing provision. The Arts Centre would also incorporate a Learning Academy which would offer skills development and training opportunities to the local community, particularly young people.

The Steering Group carried out an initial community consultation which showed demand for an Arts Centre, and obtained funding to allow a feasibility study and commissioned Jura Consultants to carry out the study.

E.2 Research Methodology and Findings

The feasibility study was supported by a variety of research including the following:

- Survey research (206 on-street surveys with residents of North Berwick, Haddington and Dunbar and 224 online surveys distributed amongst Steering Group members' contacts)
- Focus group and telephone interviews with key stakeholders representing the North Berwick and East Lothian arts sector.

Key findings:

- Strong demand for a North Berwick Arts Centre amongst both members of the community and the local arts sector. A cinema, theatre and exhibition space were identified as the preferred arts programmes with strong support for facilities including a café, bar and car-parking
- The immediate local market as the primary market for arts performances. Day trip and tourist audiences, amongst whom an Arts Centre could enhance the appeal of visiting North Berwick, as secondary markets
- The typical facilities (including audience capacity), programming mix, admission charge, volunteer involvement, and significance of revenue funding support at comparator arts centres
- A series of issues and limitations surrounding the various venues currently available for hire as performance spaces in North Berwick
- A high level of café provision in North Berwick however there is opportunity for a bistro style offer (similar to that provided at comparators) which would appeal to all markets
- Recognition of the potential social and economic benefits, particularly in terms of enhancing community integration and providing opportunities for young people, both of which have been identified as priorities for the North Berwick Coastal Ward

E.3 Feasibility Assessment

The results of the research were used to identify anticipated visit numbers, optimum capacity and performance programme from which a preferred arts centre model was developed and subjected to feasibility testing.

Key components are as follows:

- The preferred option is a 'local Arts Centre' model with main auditorium seating 200 and a studio seating 100
- Visitor facilities to include a quality bistro-type facility. This could be operated as a social enterprise as part of the Learning Academy
- Reception space with opportunity to host small-scale exhibitions would be desirable
- Other facilities would include dressing rooms (ideally with toilets), backstage storage, office space and public male, female and disabled toilets
- On-site car parking is desirable. If this cannot be achieved close proximity to public transport terminals will be essential
- Training and learning opportunities provided through Learning Academy programme

There would be approximately 221 performances per annum (anchored by film, music and drama performances), with 27,800 visits to the main auditorium and 32,500 visits to the café/bistro/bar. This is based on the assumption that the facilities are available for use 7 days per week. The income and expenditure analysis based on the proposed model indicates an annual deficit in the region of approximately -£90,000. This is not an unexpected outcome and closely mirrors the typical experience at other similar arts centres.

The capital costs analysis identifies a total construction cost in the region of £4.27 million based on a total floor area of 945m². Capital funding opportunities are available, particularly through National Lottery funding bodies, however competition will be extremely high and even if successful there will still be a considerable funding gap to fill.

E.4 Social and Economic Impact

The proposed North Berwick Arts Centre has real potential to impact meaningful social benefit on sections of the local community facing issues concerning training and employability (for young people in particular), an aging population and access deprivation. The Learning Academy is a key element in the delivery of such social benefits.

The visitor impact of the North Berwick Arts Centre on the East Lothian economy is anticipated to be approximately £480,000 net additional expenditure. This equates to an employment impact on the local economy of approximately 9.5 Full Time Equivalent employment positions.

E.5 Recommendations

- The Steering Group should proceed to the second stage of the feasibility study and explore the various potential locations for the recommended arts centre. From this a specification can be drawn and the capital costs revisited and refined.
- Should a feasible option emerge the next step is to consider the fundraising strategy for the project. It will be important to approach funders directly.
- Simultaneous to this a business plan should be completed to test the phase 1 feasibility assumptions based on more detailed understanding of key variables such as programme and location and explore alternative scenarios through sensitivity testing. This will enable clearer understanding of the specific challenges and risks to be addressed going forward
- Begin to consider the appropriate governing vehicle for developing and operating the centre.

1.0 INTRODUCTION

1.1 Introduction

This study considers the feasibility of developing a purpose-built arts venue in North Berwick. Commissioned by the North Berwick Arts Centre Steering Group (NBACSG), it has been undertaken by Jura Consultants, and defines the outline business case and indicative delivery costs, as well as assessing the potential economic and community impact and providing an action plan indicating the next steps to be taken. It is informed by comparator analysis, market appraisal and consultation conducted with the local and day trip populations.

1.2 North Berwick

Situated on the coast of East Lothian, North Berwick is an attractive and popular visitor destination. The population of the town is 6,380, while 12,468 people live in the North Berwick Coastal ward, almost 13% of the population of East Lothian.

The population of North Berwick is set to grow considerably over the next 10 to 20 years although it is difficult to quantify the exact amount at this early stage. Land has been allocated for 600 new houses and East Lothian Council is currently engaged in further discussions regarding additional expansion.

North Berwick has good railway and road links to Edinburgh, and boasts a flourishing arts community (further information provided in Section 4, from p.23).

1.3 The North Berwick Arts Centre

With an abundance of local arts groups and galleries and its annual Fringe By the Sea festival, an independent event coinciding with the Edinburgh International Festival attracting thousands of visitors to the seaside town every August, North Berwick has a flourishing and vibrant arts community. Throughout the year the seaside town is also one of East Lothian's top destinations for day trip visitors and tourists owing to its attractive scenery, abundance of wildlife and a variety of visitor attractions to name but a few attractors. Despite this however, there is currently no dedicated arts venue within the town meaning its local residents must travel 20 miles to Musselburgh in order to access a dedicated arts facility. This also implicates on the quality and extent of arts-based activity that can be offered for visitors during the Fringe by the Sea and year round.

It is the vision of the NBACSG (the Steering Group) to create an inspiring and exciting Arts Centre offering a vibrant hub of performance creativity and learning that will appeal to locals and visitors alike. It is intended that the Arts Centre would host a varied programme encompassing a variety of art genres and also function as a learning academy for young people looking for

employment in related arts industries with opportunities for involvement of retired professionals/experts on the delivery side. It is envisaged that a learning academy would provide skills development and training opportunities relating to a wide variety of roles including performance, event management, catering, front-of-house customer service roles, and back-of-house operational roles.

Having recently conducted community consultation and a mapping exercise into existing community facility provision, the Steering Group has identified a demand for a new arts venue, an opportunity for a new arts venue to address a series of social and economic issues within the North Berwick area and a 'wish list' of desired elements for the venue.

1.4 The Study Brief

The feasibility study is therefore required to establish the viability of such an Arts Centre within North Berwick. This study represents Stage 1 of the feasibility assessment with Stage 2 being the exploration of site selection, the architectural brief and project costs should the feasibility be demonstrated at Stage 1. The Steering Group's stated objectives for the study were to:

- Establish a strategic project brief
- Assist the Steering Group in making informed decisions
- Support future funding applications
- Ensure quality services to the most important stakeholder – the local community
- Improve / enhance collaborative partnership working
- Assist in delivering an effective and professional Business Plan

1.5 The North Berwick Arts Centre Steering Group

The following organisations are represented on the NBACSG:

Fringe by the Sea

Fringe by the Sea has now been going for 7 years - progressing from a 4 day festival with 13 ticketed performances in 2008, to the most recent of 7 days with over 55 ticketed events being featured.

It regularly attracts in excess of 7,000 attendees and uses a number of venues within North Berwick. The last two years has seen the development of a 'harbour hub' with two Speigeltents and a food court, but other venues involved during the festival were St Andrews Blackadder Church, the Masonic Hall, the North Berwick Fry and the Marine Hotel. In previous years, the Abbey Church, Glen Golf Club and the Scottish Seabird Centre have also been utilised. These venues range in capacity from 600 [large Speigeltent] to approx. 70 [the North Berwick Fry and Masonic Hall].

Most recent research shows a catchment for audiences of 33% North Berwick, 21% rest of East Lothian, 13% Edinburgh, 17% rest of Scotland - the remaining 16% being UK/Overseas.

North Berwick Drama Circle

The North Berwick Drama Circle welcomes everyone from teens to pensioners. They have traditionally met twice a week in the St Andrew Blackadder Hall, where they also perform.

North Berwick Movies

North Berwick Movies show films at the Freemasons Hall on the third Saturday of each month, and are currently running a family matinee and an evening movie.

North Berwick Youth Project

The North Berwick Youth Project (also known as the North Berwick Youth Cafe) aims to provide a safe and fun environment for young people. Its drop-in centre provides fun activities, workshops on social issues and trips, and runs a disability group on Thursdays. It also provides young people with the opportunity to volunteer and gain skills from the age of 16.

North Berwick Community Centre

North Berwick Community Centre promotes an inclusive, stimulating and fun learning environment for the local community offering a programme of activities to enhance well being. The centre is managed by a voluntary management committee in partnership with East Lothian Council.

North Berwick Community Council

The North Berwick Community Council is an elected body which aims to represent the members of the community by ensuring that their views are sought, co-ordinated and expressed to the proper authorities to facilitate the implementation of any necessary action.

1.6 Report Structure

The remainder of the report is structured as follows:

Section 2	Comparator Analysis
Section 3	Consultation
Section 4	Market Appraisal
Section 5	Feasibility Assessment
Section 6	Capital Costs and Funding
Section 7	Social and Economic Impact
Section 8	Conclusions and Recommendations

2.0 COMPARATOR ANALYSIS

2.1 Introduction

This section provides a summary of the key messages derived from a review of similar arts centres. The detailed information is provided in Appendix A, from p.69. The following comparator arts centres have been considered:

- The Brunton Theatre, Musselburgh (also considered in the competitor analysis, Section 4.10, p.34)
- The Maltings Theatre and Cinema, Berwick Upon Tweed
- The Regal, Bathgate
- The Eastgate, Peebles
- Beacon Arts Centre, Greenock
- The CatStrand, Castle Douglas
- The Three Villages Hall, Arrochar
- The Brewery Arts Centre, Kendal
- The Rosehill Theatre, Cumbria

2.2 Key Messages

The box below summarises the key findings of the comparator analysis relevant for the North Berwick Arts Centre.

Facilities

- **Theatre space** is a core component - all comparators offer theatre space, some with flexible seating configurations. Theatre auditorium capacity ranges from 206 (Regal) to 500 (Beacon Arts Centre). The majority however offer seating for 200 – 300.
- **Film screenings** are a core component - all comparators have the capacity to show films either within the adaptable theatre space or within an additional space. This can be in the form of dedicated cinema space, flexible use black box studio space or flexible use studio space. Only the Brewery Arts Centre offers more than 1 cinema screen.
- **Flexible studio space** is a core component - all comparators have dedicated, typically flexible, studio space capable of accommodating a range of activities e.g. workshops, dance classes etc
- Some comparators also make use of outdoor/garden space to host performances (typically free music performances).
- **Catering facility** as a core component - with the exception of The Regal and the Rosehill Theatre, all comparators offer café/ restaurant or bar facilities with some offering more than one outlet (The Maltings and Brewery Arts Centre). Cafes/restaurants are typically open daily rather than only during performances and are marketed as meeting spaces for both the arts and general community.
- All comparators offer **venue space for hire**.

Programming

- Comparators typically offer a **varied programme** encompassing drama, music, cinema and comedy performances. Most offer a variety in terms of professional, semi-professional and community performances with the specific mix dependent on the venue capacity and target audiences. For example, the Brunton Theatre in Musselburgh has one of the largest capacities of all the comparators and since the completion of a major refurbishment in 2012 has been able to significantly expand its programming, encompassing more high quality performance events in particular. Other venues, such as the Three Villages Hall in Arrochar has more of a focus on community produced events. It is anticipated that a North Berwick Arts Centre would sit in the middle of this scale with potential to attract some of the smaller scale/ semi-professional performances that the nearby Brunton Theatre accommodates.
- Focus on **youth engagement** - dedicated youth arts programmes is a common feature. This includes performances and activities by and for young creatives. The Brewery Arts Centre in Kendal and the Brunton Theatre in Musselburgh have a particularly strong programme for young people.
- Focus on **community engagement** through classes and workshops, particularly aimed at children is also a common feature and important for encouraging arts engagement amongst local communities and generating positive social impact in the process. The Brunton Theatre has a dedicated education and outreach programme. There may be potential for a North Berwick Arts Centre to become a partner in this.

Admission

- **Varied admission charges** typically not exceeding £20.
- Venues that offer the most recent cinema releases typically charge £7-8. Venues with dedicated screens offer daily screenings (e.g. Brewery Arts Centre). Weekend screenings are common to all. Higher charges (up to approximately £15) for theatre performance screenings.
- Music/theatre performance prices range from approximately £5 (community performances) to £20 (small-scale professional/semi-professional performances)

Volunteering

- **Significance of volunteers** in supporting daily operation - all except Beacon offer opportunities to involve people as volunteers and many depend on volunteer involvement to sustain their daily operations. The Maltings in particular offer work experience placements and internships

Funding

- Significance of **grant funding support**, particularly local authority, and private donations

3.0 CONSULTATION

3.1 Introduction

Consultation with a variety of audience groups in and around the North Berwick area has formed a key element of the feasibility study. Prior to the commencement of this study the Steering Group had performed an initial survey assessing the need and demand for an Arts Centre amongst North Berwick residents. The results of this were overwhelmingly positive (almost 90% of respondents were in favour of having an arts facility in North Berwick).

The purpose of this second phase of consultation was to understand existing arts engagement, intent to use proposed facilities (based on the 'wish list' previously identified), and the requirements of use in order to ascertain the optimum centre size, facilities, potential visitor numbers and potential impact of the centre – key assumptions underpinning the feasibility tests.

As the North Berwick Arts Centre is proposed to be a facility for the local community beyond the town itself a second phase of consultation also offered the opportunity to canvass the views of potential audience groups from neighbouring towns and in doing so ascertain the extent of impact a centre could yield. Residents of both Dunbar (located approximately 25 minutes drive east of North Berwick) and Haddington (located approximately 20 minutes south west of North Berwick) were viewed as potential users of an Arts Centre and as such were selected as the additional survey locations. The following methods of consultation were performed:

- On-street Survey (206 respondents) – performed by field research company What's Your View? Ltd in North Berwick (70 respondents), Dunbar (67 respondents) and Haddington (69 respondents)
- On-line Survey (224 respondents) – distributed through various contacts amongst the Steering Group
- Focus Group – attended by representatives of 6 North Berwick groups with an interest in using an Arts Centre

This section summarises the consultation findings. See Appendix B (p.79) for full survey frequencies.

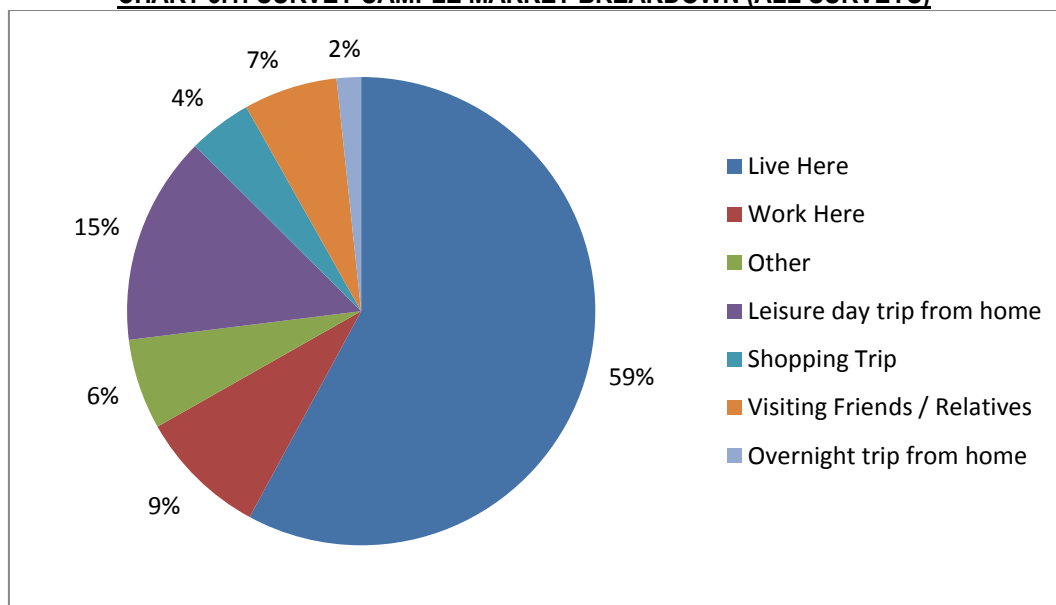
3.2 Survey

This section presents the key findings across the online and each on-street survey. Each survey was based on the same design however, necessitated by the location within which it was conducted, some alterations/additional questions were required. Further, survey analysis was performed in five batches: across all surveys and across each of the four surveys individually. For some questions this revealed interesting insights particular to location. Therefore, where results pertain to a particular survey this is denoted in the analysis.

3.2.1 Market Breakdown

All survey respondents were asked why they were in each respective location that day. This provides an indication of the market type each respondent falls in to. This is an important classification as different audience groups will have different behaviours, characteristics and preferences. Based on the 408 respondents who answered this question the survey sample market breakdown was as follows:

CHART 3.1: SURVEY SAMPLE MARKET BREAKDOWN (ALL SURVEYS)



- **Local Market** (resident within 30 minutes) – **59%** were resident in what would be the local catchment for a North Berwick Arts Centre (42% resident in North Berwick; 10% resident in Dunbar; 7% resident in Haddington).
- **Day Trip Market** – **15%** of survey respondents were on a leisure day-trip from home (7% visiting North Berwick, 2% visiting Dunbar, 6% visiting Haddington)
- **Tourist Market** – **2%** of survey respondents were on an overnight trip from home and can therefore be considered representative of the tourist market (<1% in North Berwick, <1% in Dunbar and 1% in Haddington)
- **Other Markets** – **9%** of respondents **worked** within the local catchment; **7%** were **visiting friends/relatives** (5% North Berwick, 1% in Haddington); **2%** of the survey sample were on a **shopping trip** in the local catchment (all North Berwick) and **6%** were visiting for **other reasons** (all in North Berwick). For the purposes of this analysis in terms of characteristics and behaviours the majority of these respondents can be considered akin to the local or day trip market.

The above market breakdown indicates that the survey comprises representation from all key market segments. Representation is however strongest from the local market – the market considered to be the primary market for the Arts Centre.

3.2.2 Respondent Profile

Age

A wide age range is represented in the total survey sample (n=425) including 25% aged 45-54 years, 18% aged 55-64 years, 17% aged 34-44 years, 12% aged 65-74, 7% aged under 16, 6% aged 16-24 and 4% aged 75+.

Residency

Of the 392 valid postcodes which were provided the vast majority of respondents lived within East Lothian (299 respondents, 76%).

Residency spread within East Lothian was concentrated in North Berwick itself (159 respondents, 41% of total respondents) with a substantial amount resident to the **east** of North Berwick (101 respondents, 26%) and some resident to the **west** up to Musselburgh (39 respondents, 10%).

Outwith East Lothian most numerous respondent residency clusters were in Edinburgh (46 respondents, 12%), the Borders (10 respondents, 3%) and West Lothian (9 respondents 3%).

Arts Group Membership

14% of respondents were members of arts groups (n=411). This indicates that the survey results are unlikely to have been overly influenced by those who have a disproportionately strong existing involvement in the arts.

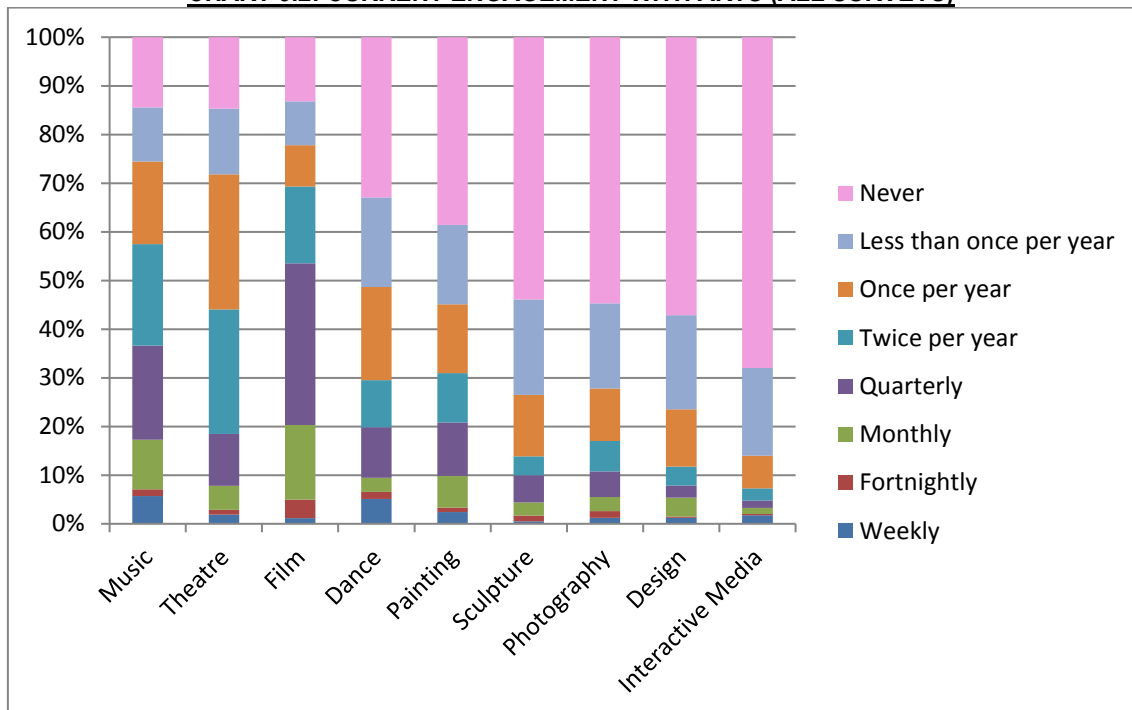
3.2.3 Current Engagement with Arts

Respondents were asked to indicate how frequently they engaged with a variety of different arts categories. Between 400 and 424 respondents provided a response to each arts type. The results are illustrated in the graph overleaf.

Across the total survey sample there was a varying degree of engagement across the different arts categories however overall there was a relatively modest regularity of engagement.

The most regular engagement was with film (53% of respondents engaged at least quarterly within the last year). Respondents engaged with music at least twice per year (57%) and with theatre at least once per year (73%).

Engagement with dance and painting was less frequent (33% and 39% never engage with this respectively) and engagement with photography design and interactive media was even lower (with 55%, 57% and 68% never engaging with these respectively).

CHART 3.2: CURRENT ENGAGEMENT WITH ARTS (ALL SURVEYS)

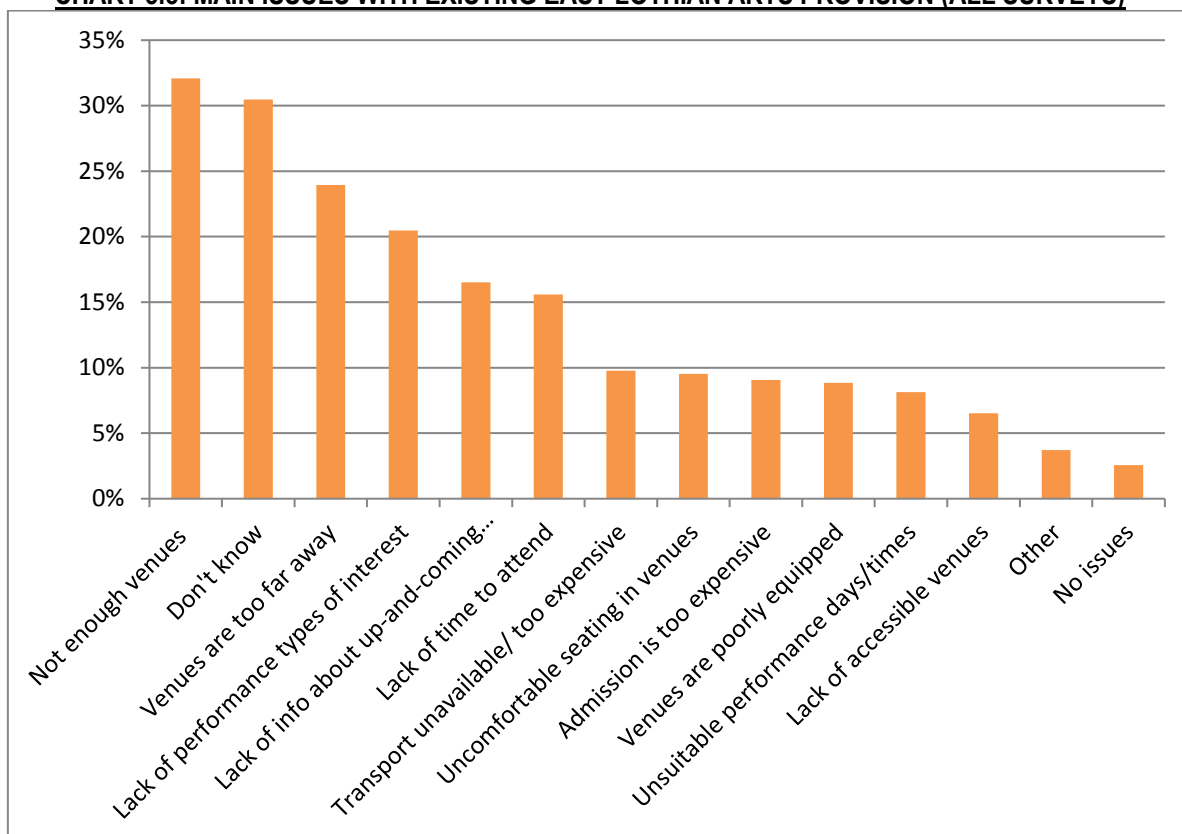
Survey respondents were also asked who they would typically attend arts performances / activities / exhibitions with. Of the 430 who responded the most common answers were with one other adult (50%) or in a family group with children (25%).

This evidence indicates some strong behavioural patterns surrounding regularity of engagement with the arts. If the reason for modest regularity of engagement surrounds lack of opportunity rather than lack of interest there is potential for a North Berwick Arts Centre to positively impact on the above trends.

3.2.4 Issues with East Lothian Arts Provision

As illustrated in the graph overleaf, the top issue with existing arts provision in East Lothian identified across all surveys (n=430) was a lack of venues (32%). A similar amount of respondents did not know (30%). The next most popular answers were venues being too far away (24%) and lack of performance types of interest (20%). Very few (3%) felt that there were no issues.

This indicates that there is a demand for an enlarged/improved provision of arts engagement opportunities in East Lothian and given that the majority of respondents live in and around North Berwick itself, indicates demand specifically in the North Berwick area.

CHART 3.3: MAIN ISSUES WITH EXISTING EAST LoTHIAN ARTS PROVISION (ALL SURVEYS)

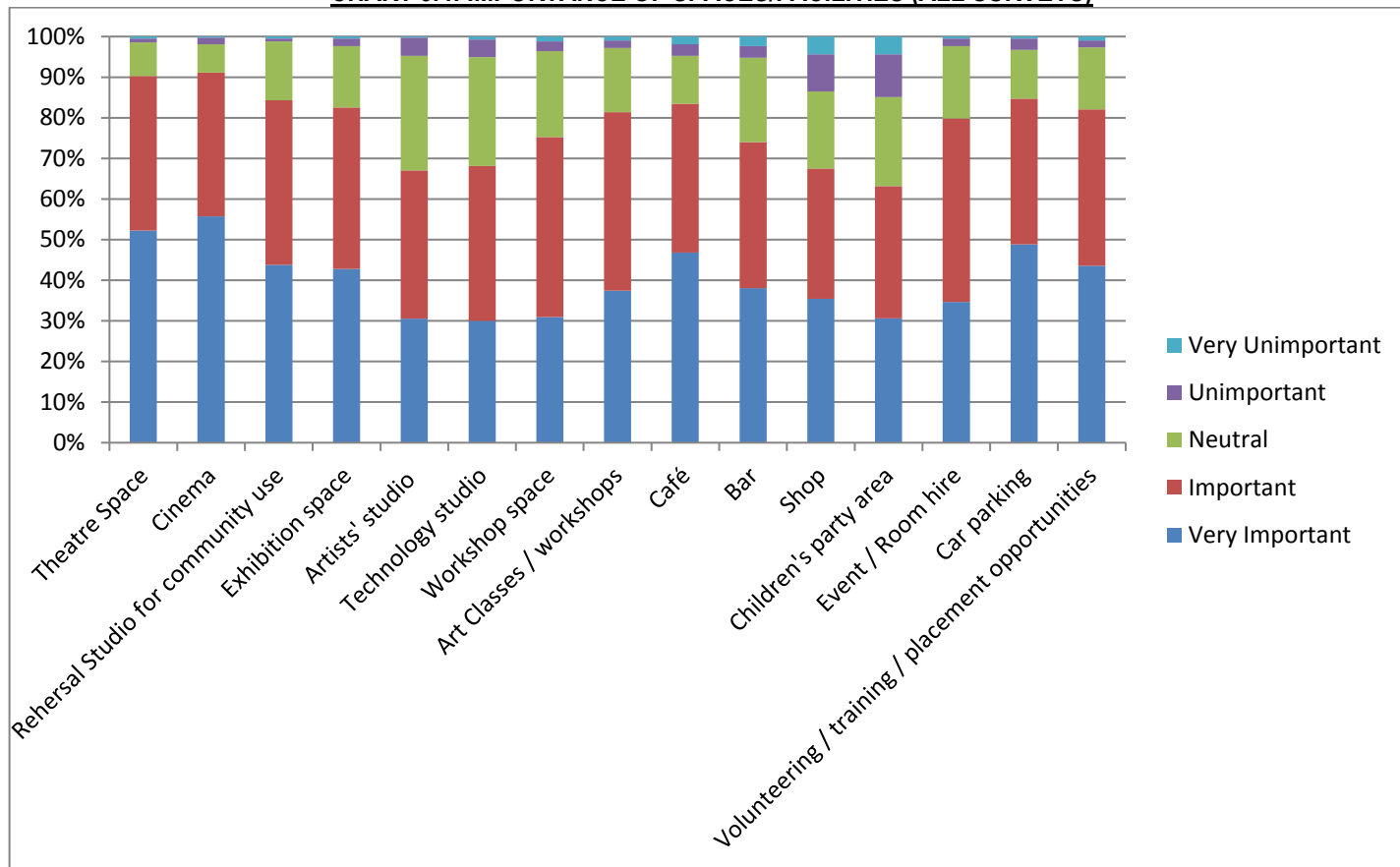
3.2.5 Arts Centre Facilities

Importance

Survey respondents were asked how important they thought it was that a new Arts Centre encompasses a range of facilities/spaces based on the 'wish list' which had been identified during the first phase of consultation conducted by the Steering Group.

The graph overleaf illustrates the response across all surveys (between 415 and 427 respondents expressed an opinion on each individual option). The vast majority of respondents felt that that it was either very important or important that all of the stated elements of a new Arts Centre should feature. Particularly important elements were:

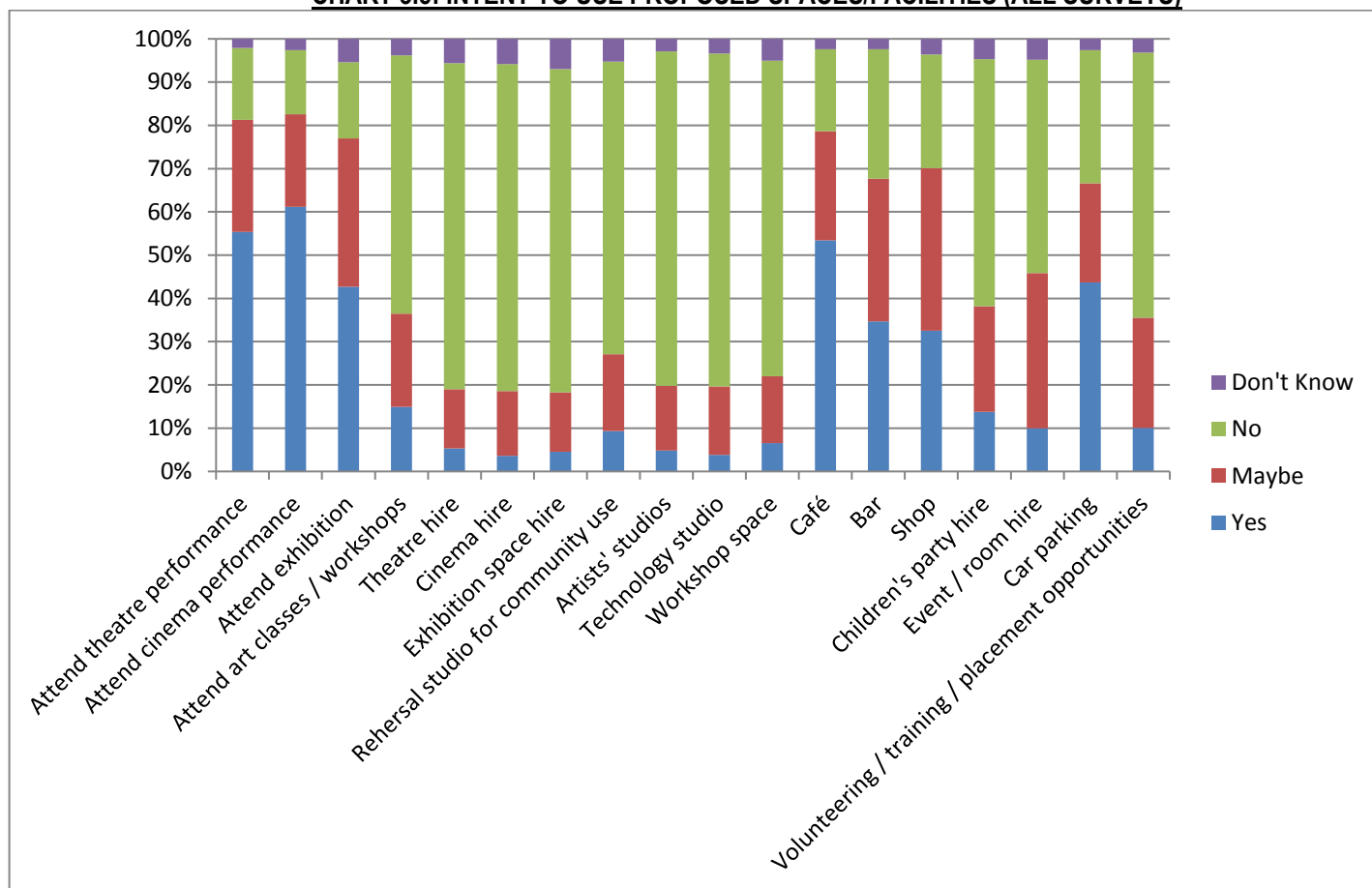
- A cinema: 91% (56% very important, 35% important)
- Theatre space: 90% (52% very important, 38% important)
- Car parking facility: 85% (49% very important, 36% important)
- Rehearsal studio for community use: 84% (44% very important, 40% important)
- Café: 84% (47% very important, 37% important)
- Exhibition space: 83% (43% very important, 40% important)
- Volunteering / training /placement opportunities: 83% (44% important, 39% very important)
- Art classes/workshops: 81% (37% very important, 44% important).

CHART 3.4: IMPORTANCE OF SPACES/FACILITIES (ALL SURVEYS)

Analysing the results from each survey individually reveals that whilst it was considered important that all elements feature, the on-street survey respondents typically expressed more enthusiasm than the online survey. Across each of the on-street surveys all of the proposed features were considered either very important or important by at least approximately 80% of respondents. Most enthusiasm was expressed in Haddington. Aspects that were considered less important by the online respondents included a shop and children's party area (30% and 27% considering them either unimportant or very unimportant respectively). Other elements generated neutral opinion only online and included artists' studio and technology studio (46% respectively). See Appendix B (from p.86) for graphs pertaining to each individual survey.

Intent to Use

Respondents were then asked whether they would attend, use or participate in each of the elements of an arts centre they considered in the previous question. This highlights that whilst respondents thought it was important that certain spaces / facilities feature, there was less inclination to actually use them themselves. The response across all surveys is illustrated in the graph below.

CHART 3.5: INTENT TO USE PROPOSED SPACES/FACILITIES (ALL SURVEYS)

Across all surveys no more than 61% said that they would attend/use/participate in each proposed element themselves. There was most inclination to:

- Attend cinema performances (61%)
- Attend theatre performances (55%)
- Use a café (53%)

Over 70% of all respondents would not hire cinema, exhibition or rehearsal space or use an artist's studio, technology studio or workshop space.

The following table sets out the key findings relating to each survey. Where individual surveys deviate from the results across all surveys this is denoted in bold. See Appendix B (from p.88) for separate survey graphs.

TABLE 3.1
INTENTION TO USE LISTED ARTS CENTRE FACILITIES - INDIVIDUAL SURVEY RESULTS

	All Surveys	Online	North Berwick	Dunbar	Haddington
Overall	Up to 61% would use/engage	Up to 78% would use/engage	Up to 59% would use/engage	Up to 46% would use/engage	Up to 38% would use/engage
Positive (> 50%)	Attend cinema: 61% Attend theatre: 55% Use café: 53%	Attend cinema: 78% Attend theatre: 71% Attend exhibitions: 61% Use café: 60%	Car parking: 63% Visit a shop: 59% Attend cinema: 54% Use a bar: 54%	None over 50% (Attend cinema: 46%, attend theatre: 43%, use café: 40%)	None over 50% (Use café: 38%, car parking 36% , attend theatre: 32%, attend cinema 30%)
Negative (> 50%)	Artists' Studios: 77% Technology Studio: 77% Cinema hire: 76% Theatre hire: 75% Exhibition space hire: 75% Workshop space: 73% Rehearsal space: 68% Volunteer/placement opportunities: 61% Art classes/workshops: 60% Children's party area: 57%	Technology Studio: 67% Artists' Studios: 63% Children's party area: 62% Cinema hire: 58% Theatre hire: 57% Workshop space: 51% Exhibition space hire: 54%	Artists' Studios: 99% Technology Studio: 99% Workshop space: 99% Exhibition space hire: 99% Cinema hire: 96% Theatre hire: 96% Rehearsal space: 96% Volunteer/placement opportunities: 96% Art classes /workshops: 87% Children's party area: 63%	Exhibition space hire: 90% Workshop space: 91% Theatre hire: 88% Cinema hire: 87% Artists' Studios: 84% Art classes /workshops: 82% Rehearsal space: 79% Technology Studio: 78% Event / room hire: 76% Volunteer/placement opportunities: 73%	Art classes /workshops: 93% Theatre hire: 99% Cinema hire: 99% Exhibition space hire: 99% Workshop space: 96% Artists' Studios: 93% Volunteer/placement opportunities: 93% Rehearsal space: 90% Event / room hire: 88% Technology Studio: 86%

Conversely to the previous question, when considering the surveys individually a higher tendency to use/engage with facilities is reflected amongst **online** respondents than on-street respondents (most of whom live or work in North Berwick). In addition to the previously indicated activities this also introduced attend exhibitions as something a majority of respondents felt they would do (61%).

On-street respondents in **North Berwick** would also use car parking (63%), a shop (59%) and a bar (54%) in addition to attend cinema performances (54%). Over 85% had no interest in attending art classes/workshops, theatre/ cinema/ exhibition/ rehearsal space hire, artists' studios, technology studios, workshop space or volunteering/training/placement opportunities.

Intent to use the listed facilities drops amongst Dunbar and Haddington respondents with no one facility receiving a majority positive response. On-street respondents in Dunbar were most interested in attending the cinema (46%) or theatre (43%) or using a café (40%). This was also the case in Haddington however although lower percentage rates were recorded. There was also a higher negative response rate amongst Dunbar and Haddington respondents, symptomatic of the fact that they are located further away. One facility particular to these groups in the negative response rate was event / room hire implying that there is sufficient provision in their local area.

Another noteworthy finding is relatively low interest in volunteering / placement / internship opportunities (particularly amongst the on-street surveys where 96% of North Berwick respondents, 73% of Dunbar respondents and 93% of Haddington respondents would not make

use of this). This is despite the fact it is considered important to offer (83%). The experience of the comparators as highlighted in Section 2 (from p.5) indicates the importance of volunteer support for the running of arts centres.

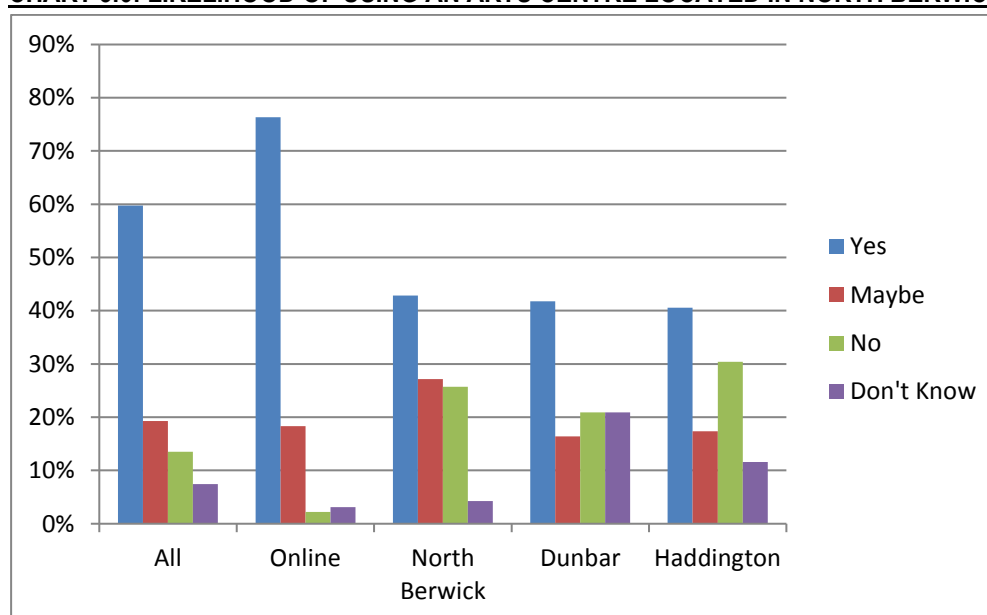
Respondents were also invited to make any other suggestions regarding facilities and spaces. Several respondents took this opportunity to indicate their enthusiasm for the project overall to emphasise the need for a central location or to comment on the need for improved public transport to bring people to the centre. Additional specific suggestions included music programmes and activities and artists in residence complete with activity programmes.

Comparing the responses to these two questions indicates that there is demand for an Arts Centre and that there is also intent to use it amongst members of the local community. However intent to use is stronger amongst North Berwick respondents and also stronger in relation to particular facilities/types of engagement including attending cinema, café, theatre followed by attend exhibitions, bar, shop and need for car parking. There is less inclination to hire spaces themselves.

3.2.6 North Berwick Location

All respondents were asked if they would make use of an arts facility such as that outlined in the previous questions if it were to be located in North Berwick. As outlined in the graph below across all surveys the majority of respondents answered yes (60%). Across each individual survey, online respondents considered themselves most likely to (76%). Fewer respondents to the North Berwick, Dunbar and Haddington surveys answered yes (41%-43%).

CHART 3.6: LIKELIHOOD OF USING AN ARTS CENTRE LOCATED IN NORTH BERWICK



A minority of respondents overall indicated that they would not use an Arts Centre located in North Berwick (13%). This encompasses 2% of online respondents, 26% of North Berwick on-

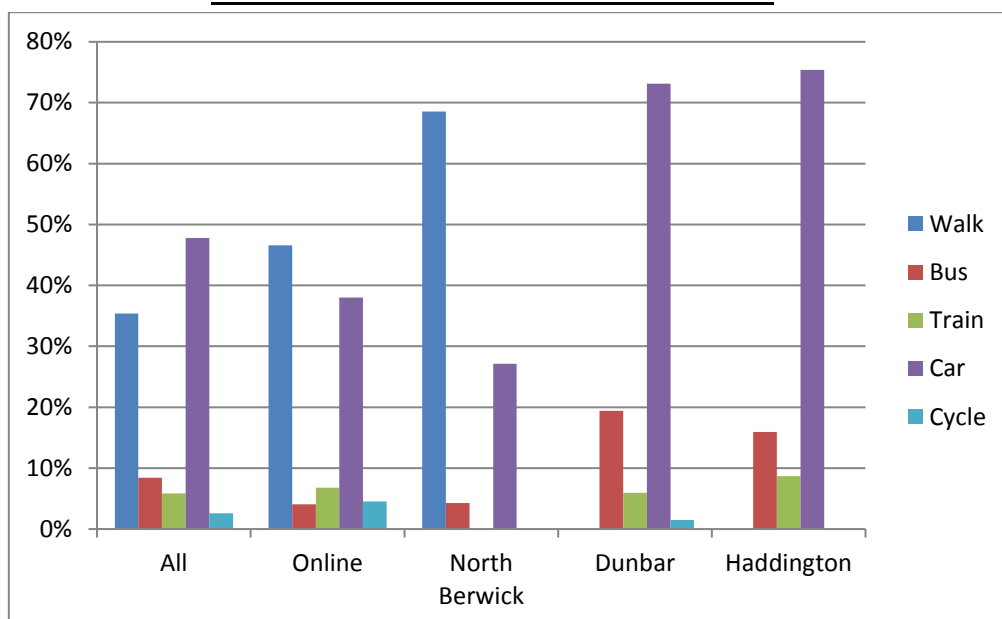
street respondents, 21% of Dunbar on-street respondents and 30% of Haddington on-street respondents.

Amongst those who indicated that they would not or only may use a North Berwick based Arts Centre the main reason was having no interest in any arts performances/activities (27% of the 158 who answered this question) followed by it being an inconvenient location (21%) and lack of time (18%). Few respondents indicated that this was either because it does not offer facilities/performance types of interest or because they are satisfied with existing provision elsewhere (8%). The most common 'other' response was that it would depend on the particular programme of activity.

Overall this evidence indicates support for an Arts Centre located in North Berwick. It does however also highlight the reality that not all members of the local community will either want or be able to use the facility. Such information is key to informing visit number projections.

The following chart outlines the preferred mode of transport to a North Berwick Arts Centre.

CHART 3.7: PREFERRED MODE OF TRANSPORT



The preferred mode of transport to an Arts Centre located in North Berwick amongst all survey respondents (N=427) was by car (48%) followed by walk (35%). This split is reflected in the online survey (47% walk, 38% car). The North Berwick on-street survey indicated a preference for walking (69%) whereas both Dunbar and Haddington surveys would prefer to drive (73% and 75% respectively). This is perhaps unsurprising given the earlier comments regarding inadequate public transport provision in East Lothian. This indicates that if there are no improvements in public transport it will be especially important that the Arts Centre would have parking facilities.

3.2.7 Social Impact

Survey respondents were asked to consider whether there were any social issues or particular sections of the local community they felt a North Berwick Arts Centre could benefit. The word cloud overleaf illustrates their responses (note that size of word/phrase denotes frequency).

As illustrated overleaf it was strongly felt that an Arts Centre would benefit all ages / members of the community (North Berwick and the wider locality), promoting community integration as a result, (31 respondents) and that it could and should specifically benefit young people (33 respondents). A real need for facilities to engage young people in the area was recognised. Other comments recognised the employment and tourism benefits the centre could bring and felt that it should specifically focus on vulnerable groups such as the elderly, unemployed or those facing learning / access difficulties. A selection of full comments is provided below:

To be inclusive for all sections of the community but as outlined in your proposal to offer young people training and employment in the arts, hospitality and tourism would be particularly welcome in the town.

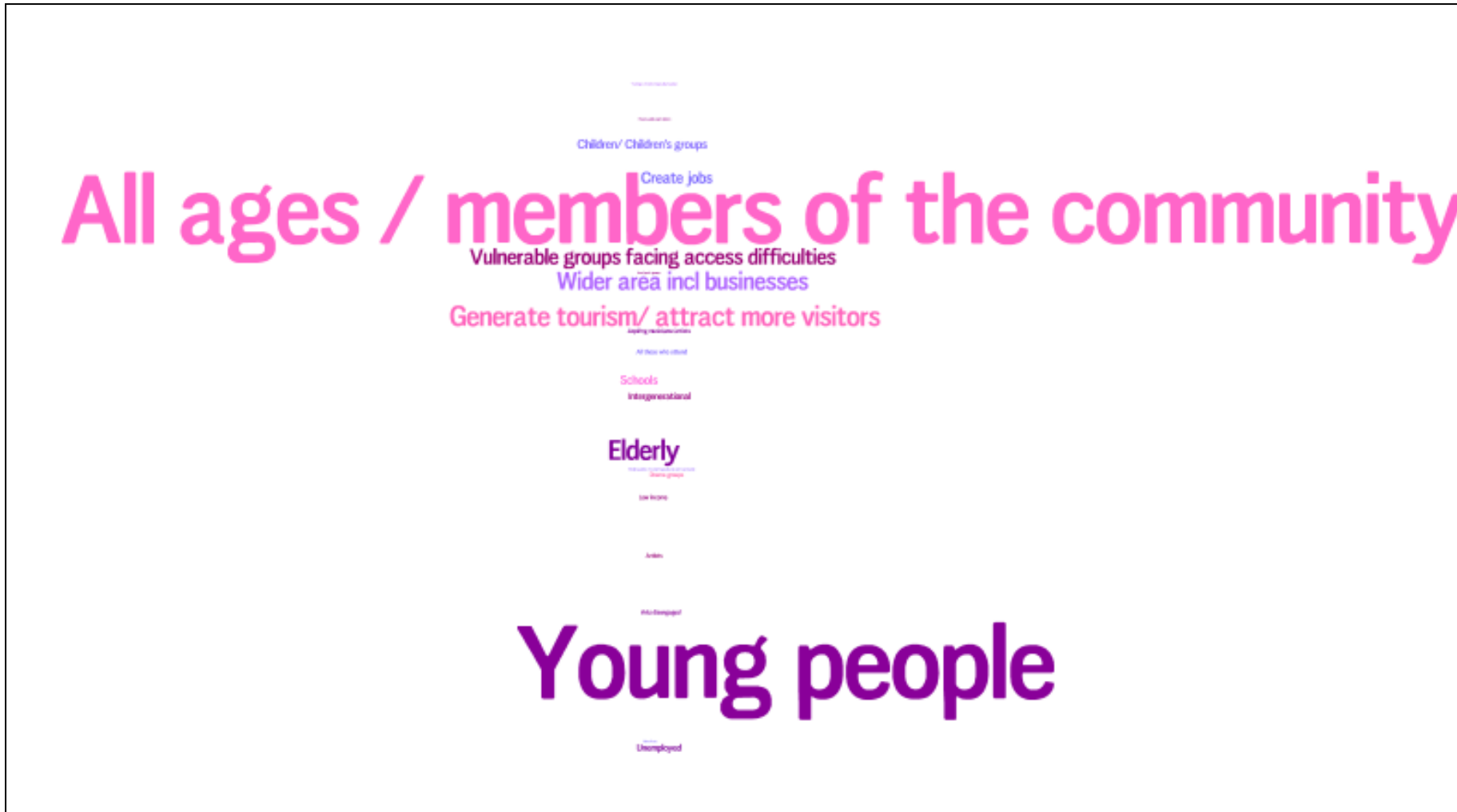
Teenagers would benefit from volunteering/ helping/ performing. Lack of provision for teenagers in North Berwick currently.

A venue for young people and to mix the community so all ages can learn together.

I have a child with autism. There is generally very little opportunity for him to take part in local activities. He doesn't like crowds/bustle so any dedicated sessions just for children/adults with additional support needs, where it doesn't matter if they make a noise etc, would always be welcome.

Access to a cultural centre for people who may find it hard to travel - young, old, parents with small children, the unwaged

DIAGRAM 3.1: POTENTIAL SOCIAL BENEFITS IDENTIFIED BY RESPONDENTS



3.2.8 Young People

Given the identified need for engagement with young people, the views of the young people aged under 16 and 16-24 years who participated in the surveys were explored specifically (53 respondents). The following summarises the key findings:

- Main issues with current provision: lack of venues (40%); lack of time to attend (38%)
- The majority of respondents considered all of the proposed elements to be very important or important
- However, as per the other respondents there is less intention to use the proposed facilities. Cinema (68%), café (60%), shop (47%), theatre (38%) were most popular. Only 7 respondents (13%) were interested in volunteering/placement opportunities
- Overall 43% would use an Arts Centre in North Berwick. Amongst those who would not the main reason was lack of interest in anything offered.
- There was a strong sense that the main beneficiaries should be the wider community – they did not specify young people as per the overall survey respondents

This indicates that the young people who participated in the survey are supportive of an Arts Centre and that a sizeable amount would use an Arts Centre located in North Berwick (particularly cinema and café). However, there was a lack of interest in volunteering opportunities and lack of recognition that young people could be amongst the key beneficiaries of such a facility. This is not necessarily an indication that there is no need for opportunities for young people however. It is perhaps symptomatic of the fact that those who completed the survey may not be in need of such opportunities themselves and therefore do not perceive that to be a need amongst others.

3.2.9 Key Findings

The box below summarises the key findings from the survey research:

- The survey represents all key market segments. Representation is however strongest from the local market – the primary market for the Arts Centre
- Whilst film followed by music and theatre were the art forms with which there was most engagement, the survey suggests that overall there is currently a modest level of engagement with the arts in East Lothian. This indicates the existence of strong behavioural patterns that may, for some audiences, be challenging for a new Arts Centre to immediately address.
- There is dissatisfaction with current arts provision, support for all of the proposed facilities / spaces within an Arts Centre and majority support for the location of an Arts Centre in North Berwick.
- However, the intent to use particular proposed facilities is lower than the expressed level of support and there remains a substantial portion of respondents who would not engage with an Arts Centre located in North Berwick.
- This indicates that whilst there is real potential to yield a positive impact on current modest arts engagement levels, there will be a limit as to how far a new facility can change existing perceptions and behaviours.
- Components of an Arts Centre that would be most used include a cinema, café, theatre followed by exhibitions, bar, shop and car parking. Respondents would prefer to either walk or drive to the centre further highlighting the significance of car parking facilities.
- There is relatively low interest in volunteering / placement / internship opportunities. It should however be noted that there is currently considerable volunteer support for many existing North Berwick groups, including those represented on the Steering Group. This indicates the existence of volunteers in the local community with a particular interest in arts however the survey research also highlights potential challenges in recruiting a wider/more diverse volunteer base. The experience of the comparators emphasises the importance of volunteer support.
- An Arts Centre has recognised potential to deliver positive social and economic impact on the North Berwick and surrounding locality particularly in terms of enhancing community integration and providing opportunities for young people. Interestingly, the young people who participated did not recognise a direct opportunity for them however this may be symptomatic of the fact that those who completed the survey may not be in need of such opportunities themselves rather than an indication of a lack of need for young people overall.

3.3 Focus Group

On July 14th 2014, Jura Consultants facilitated a focus group with key stakeholders of the potential Arts Centre. Amongst those present were representatives of North Berwick Community Council, North Berwick Drama Circle, North Berwick Movies, North Berwick Youth Project, Tyne and Esk Writers and the North Berwick Royal National Lifeboat Institution. The key messages from this session (and the initial commissioning meeting which touched upon similar topics) are

outlined below. Follow-up conversations were held with representatives of the North Berwick Community Centre and the East Lothian Council Principal Arts Officer.

Facilities

- Main auditorium space - North Berwick Movies indicated that a main auditorium with a minimum capacity of 120 up to a maximum of 250 would meet their needs. The Arts Officer from East Lothian Council indicated that a capacity of approximately 200 would be appropriate and could enable a North Berwick Arts Centre to complement and fit with the programming at the nearby Brunton Theatre.
- Main auditorium space should be as flexible as possible and accommodate drama/music performance and film screenings. A permanent stage facility is important. A drop-down cinema screen would be sufficient for showing films
- Seating should be as flexible as possible and offer good viewpoints
- Facilities to allow digital feeds, enabling live screenings of plays performed elsewhere in the country. An in-built sound system would be of benefit
- Importance of acoustics in the performance space for groups such as North Berwick Choir. Others suggested sound-proofing to enable appeal to groups such as the North Berwick Samba Band as a practice/ performance venue
- Studio space with capacity for 100-120. Studio space should accommodate a range of community uses such as dance, exercise classes and meeting space rendering it capable of fulfilling demand which currently exceeds provision at the Community Centre

Supporting Facilities

- Desire to have a bar facility
- Cafe - considered to be an integral method of drawing people in
- Space to bring in scenery and good backstage facilities in general are of utmost importance in order to attract professional companies
- Separate male and female changing rooms were desirable but not a necessity
- Backstage toilets were considered vital, as was circulation space between stage area and backstage
- Storage facilities were considered to be of considerable importance
- Function space which can be hired out

Volunteers

- Each group relies heavily on their own volunteers, and felt that they would be interested in taking on the types of roles that would be required to run the new venue
- Difficulties in encouraging volunteers were highlighted. However, Fringe By The Sea attracts a large number of volunteers as it offered the opportunity for the volunteers to see performances, and thus it is considered important to examine ways in which volunteers to the Arts Centre could be offered similar incentives and benefits, particularly to younger volunteers
- There is a growing number of people in North Berwick taking early retirement, it is hoped that volunteering opportunities at the Arts Centre would appeal to them
- STRiVE, the lead partner in Voluntary Action East Lothian the Third Sector Interface (TSI) for East Lothian currently supports the volunteer network in the region and could provide further assistance helping new volunteers to come on-stream through the Arts Centre

Learning Academy

- There is the desire that the Learning Academy provides accreditation training and development opportunities for young people to enhance their employability skills including arts, theatre production, catering and hospitality. This is of considerable importance, particularly since current employability training presently ends in the Tranent/ Musselburgh region
- There could be potential for a learning programme at a North Berwick Arts Centre to become part of the existing council East Lothian Works scheme, as a placement venue or a partner in the programme. The Steering Group's objectives and aspirations for the Arts Centre correspond with the council's objectives underpinning this scheme.
- North Berwick Youth Project aims to work in partnership with the Arts Centre to deliver this and give young people professional recognition for their learning. There is very little training available in the area and the academy would support young people secure future training and employment
- There is also the desire that the Learning Academy promotes inter-generational opportunities whereby skilled retired members of the community share their skills and experience with young people.
- Providing increased opportunities for young people is currently the number one priority of the North Berwick Coastal Area Partnership, part of the East Lothian Partnership the overarching partnership responsible for community planning in East Lothian.

Current Performances and Existing Facilities

- North Berwick Drama Circle has traditionally put on 2 full-scale productions per year, running for 4/5 nights. Rehearsal facilities were required for approximately 10 weeks prior to this
- North Berwick Movies presently operate one screening day per month
- North Berwick Choir meet once a week, with approximately two performances per year
- The Tyne and Esk Writers Club are currently seeking an informal meeting and performance space
- The North Berwick Community Centre currently cannot meet the high demand for bookings by local community groups. The Centre is used throughout the year often with regular bookings meaning it cannot always accommodate one-off uses such as exhibitions or other events. Evenings are very busy, particularly Fridays. It was noted that the Community Centre could be filled twice over such is the current demand. This high demand also means it cannot support the establishment of new groups and classes (such as new adult learning activities). The facilities at the Centre are also not fit for purpose for many groups; the lack of permanent stage is a particular issue.
- Other local community venues have a range of space and facility limitations rendering them unfit for purpose for many groups. There is also the feeling that a North Berwick Arts Centre would not directly compete with the nearby Brunton Theatre and could offer some of the performers an opportunity for additional shows as part of an East Lothian tour (see Section 4.10, p.34 for further details)

4.0 MARKET APPRAISAL

The following section comprises an appraisal of the potential market for the North Berwick Arts Centre. It encompasses:

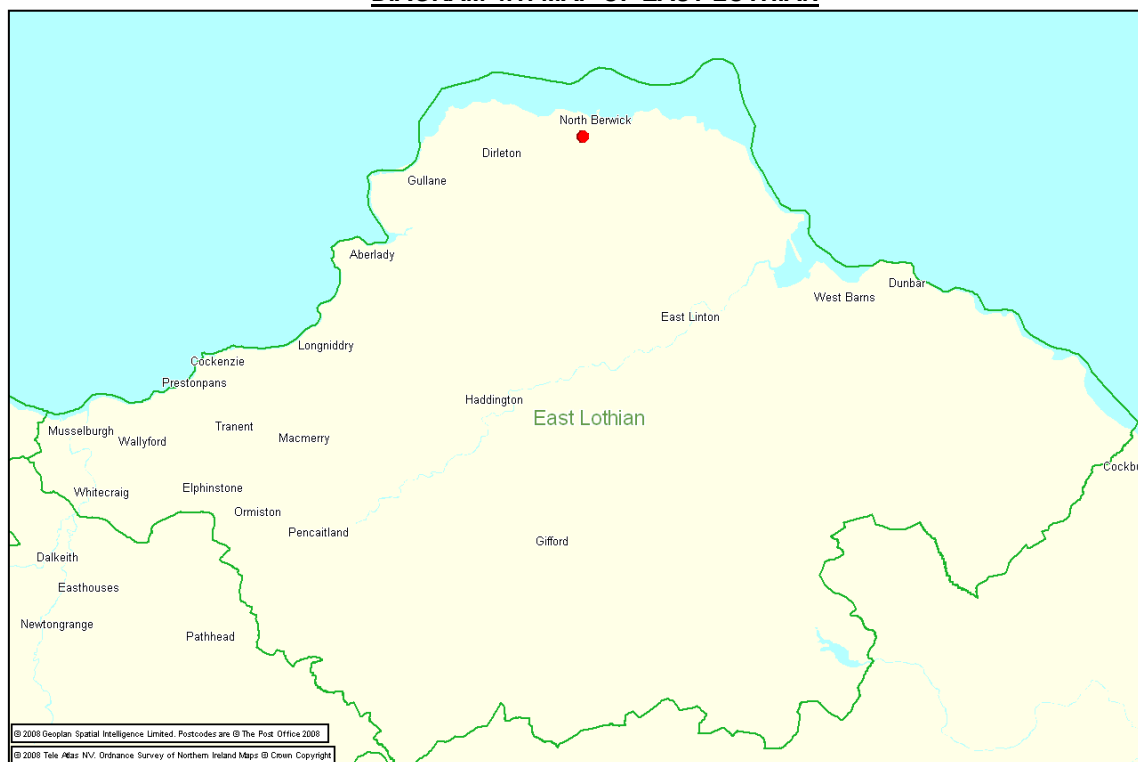
- Local market – split into immediate local market encompassing the North Berwick Coastal Ward and the wider local market encompassing all settlements within a 30 minute drive time of the town
- Day trip market – residents with potential to visit the Arts Centre as part of a day trip (here those living approximately 31 – 60 minutes drive of North Berwick)
- Education market – in this instance predominantly primary and secondary pupils within the North Berwick catchment area
- Tourist market – overnight visitors to North Berwick (domestic and overseas)

The market appraisal also examines local competitor attractions in and around the North Berwick area. This is important to understand any areas of potential competition, gaps in current provision and opportunities for a new Arts Centre to meet the needs of its audiences and also generate income.

4.1 North Berwick

North Berwick is located on East Lothian's northerly coast (illustrated on the map below). East Lothian Council cites the total population of North Berwick itself as **6,380**.

DIAGRAM 4.1: MAP OF EAST LOTHIAN



4.2 Local Market

The local market is considered to be the total population within a 30 minute drive time of North Berwick. This includes the entirety of East Lothian (illustrated in the map above).

The table below sets out the population of the wards comprising the East Lothian Council area.

TABLE 4.1 LOCAL MARKET (30 MINUTE DRIVE TIME)		
Council Area	Ward	Population
East Lothian (7 of 7)	Musselburgh West	10,107
	Musselburgh East and Carberry	14,012
	Preston/Seton/Gosford	16,410
	Fa'side	19,091
	North Berwick Coastal	12,468
	Haddington and Lammermuir	12,916
	Dunbar and East Linton	13,166
Total		98,170

Source: Scottish Neighbourhood Statistics

North Berwick is located in the North Berwick Coastal Ward. As outlined above, approximately 12,500 people live in the ward (representing approximately 13% of the total East Lothian population). Other main settlements located in this ward include Gullane, Aberlady and Dirleton. Within the wider 30 minute drive time there is a wider local population of approximately 98,200. This figure is inclusive of the population of North Berwick and North Berwick Coastal Ward.

It is considered that the local market located within an approximate 15 minute drive time would be the primary market for an Arts Centre in North Berwick. This encompasses the residents amongst whom travelling to North Berwick would be quicker than travelling to the Brunton Theatre in Musselburgh. This includes the population of the North Berwick Coastal Ward and approximately 50% of the Haddington & Lammermuir and Dunbar & East Linton wards (approximately 24,500 people in total).

Immediate Local Market Profile

East Lothian Partnership has produced an area profile for the North Berwick Coastal Ward (*North Berwick Coastal by numbers, 2014*).

This document highlights the significance of North Berwick as a population centre within the ward (53% of the ward population reside there). It also indicates that there is currently a strong population growth rate in the ward (around double that for Scotland) and that this pattern is anticipated to continue in the future.

Whilst the document identifies the North Berwick Coastal Ward (NBC ward) as having proportionately low rates of deprivation, as an area of high employment, general affluence, high education attainment, high quality housing, low crime and a positive sense of neighbourhood and place, it is not without challenges and issues. These are as follows:

- There is a significantly higher percentage of **people of pensionable age** living in the NBC ward than average across East Lothian and Scotland (32% of all households are made up entirely of residents aged over 65 years compared to 23% across East Lothian). In line with this a proportionately low amount of the ward population are working age (57% compared to 66% across Scotland). Further, the proportion of older people is set to grow and continue to exceed that for East Lothian and Scotland. It is anticipated that by 2031 approximately 56% of the ward population will be 65 years or older.
- There is considerable **variation in economic activity, unemployment and financial position** of households within the ward. Compared to across East Lothian the North Berwick Coastal Ward has a lower proportion of the working age population who are economically active (67% compared to 71%); a lower proportion of the working age population are employed part-time (14% to 15%) and full-time (34% to 40%) whereas a higher proportion are self-employed (14% to 9%).
- Whilst overall school attainment is good across East Lothian, there are issues relating to **school leavers attaining and sustaining positive post-school destinations**. Because of this early intervention, ensuring all young people enter schooling equipped to learn and receive the support they need to reach their potential has been identified as a key focus.
- Certain datazones within the ward can be considered **access deprived** (reflecting their rural nature). Four datazones in the North Berwick Coastal ward are among the 20% most access deprived datazones across Scotland. Residents are more likely to use a car to travel to a range of local services than others across East Lothian overall. Further, there are clear public transport issues with less than 47% in the ward agreeing that public transport would take them where they want to go.

These statistics indicate that there are a number of socio-economic issues in need of attention in and around the immediate area surrounding North Berwick. With a high proportion (and growing proportion) of older people; issues surrounding positive post-school destinations for young people; employment opportunities (other than self-employment) and transport and access issues, the need for community facilities that promote inclusion, develop skills and provide people with opportunities that meet their needs within the community is apparent now and likely to enhance as the population grows. An Arts Centre located in North Berwick has the potential to positively contribute to such socio-economic issues.

4.3 Day Trip Market

The day trip market is considered to be everything that lies within a 60 minute drive time of North Berwick (excluding the population already cited in the local market). This includes Edinburgh, Midlothian and a proportion of the Scottish Borders.

DIAGRAM 4.2: MAP OF CENTRAL-EAST AND SOUTH EAST SCOTLAND



The table below breaks the day trip market down by local authority and ward; where approximately only half of a ward falls within the drive time, this is denoted by the symbol 0.5.

TABLE 4.2 DAY MARKET (60 MINUTE DRIVE TIME)			
Council Area	Ward	Population	Total
City of Edinburgh	Almond	25,616	
	Pentland Hills	23,091	
	Drum Brae / Gyle	23,545	
	Forth	32,326	
	Inverleith	33,155	
	Corstorphine / Murrayfield	21,959	
	Sighthill / Gorgie	39,456	
	Colinton / Fairmilehead	26,492	
	Fountainbridge / Craiglockhart	26,368	
	Meadows / Morningside	38,007	
	City Centre	25,741	
	Leith Walk	33,638	

TABLE 4.2 DAY MARKET (60 MINUTE DRIVE TIME)			
Council Area	Ward	Population	Total
	Leith	25,584	
	Craighentiny / Duddingston	25,170	
	Southside / Newington	36,738	
	Liberton / Gilmerton	33,363	
	Portobello / Craigmillar	25,111	495,360
Midlothian	Penicuik	13,832	
	Bonnyrigg	16,299	
	Dalkeith	10,553	
	Midlothian West	14,099	
	Midlothian East	15,149	
	Midlothian South	12,438	82,370
Scottish Borders (4 of 11)	East Berwickshire	11,177	
	Mid Berwickshire	9,929	
	Leaderdale and Melrose (0.5)	5,298	
	Galshiels and District (0.5)	6,995	33,399
TOTAL			611,129

Source: Scottish Neighbourhood Statistics

With a total day visitor population of **611,129** North Berwick experiences a strong day trip market. This is largely attributable to its close proximity to the City of Edinburgh. North Berwick is already a popular destination amongst this market and whilst the creation of an Arts Centre is unlikely to be a key driver of day trip visits it would enhance the visitor offer contributing to the appeal of visiting the town. The café/bistro facility could also have particular appeal to day trip visitors in the town.

4.4 Education Market

The North Berwick Arts Centre aims to provide learning opportunities for younger children as well as prospective employment and internships for older students. To this end, an examination of the number of children in local education is useful. The table below shows the number of school children in education within the North Berwick High School catchment area (note that this boundary largely mirrors that for the North Berwick Coastal Ward).

TABLE 4.3 PUPILS NORTH BERWICK		
	No. of Schools	No. of Pupils
Primary	5	1,017
Secondary	1	942
Special	-	-
Total	6	1,959

Source: Scottish Schools Online, 2013

There is a total of 1,959 school pupils in the North Berwick catchment. Whilst the North Berwick catchment area can be considered the core catchment for education visits to a new North Berwick Arts Centre, there is potential to draw visits from across the East Lothian region depending on the size, scope and programming of the centre. As outlined in the table below there is a total potential education market of **13,658** pupils. This figure includes those attending schools detailed above.

TABLE 4.4 PUPILS EAST LoTHIAN	
	No. of Pupils
Primary	7,913
Secondary	5,745
Special	-
Total	13,658
<i>Source: Scottish Government, 2013</i>	

4.5 Tourist Market

The following section examines the current tourism market of North Berwick (all those visiting the town as part of an overnight trip). The tourist market is of significance given the fact they will be in the area for a sustained length of time and will therefore have increased opportunity to utilise the facilities of the Arts Centre (both as a performance venue and café) during their stay.

The table below depicts the total number of domestic tourists to the region in comparison with Scotland overall. The results are drawn from a Visitor Survey conducted by VisitScotland in 2013. Note that the figure relating to Lothians (excluding Edinburgh) have been separately calculated based on the supplied Edinburgh & Lothians and Edinburgh figures.

TABLE 4.5 EXPENDITURE AND NUMBER OF TRIP BY DOMESTIC AND OVERSEAS TOURISTS 2013								
	Edinburgh and the Lothians		Edinburgh		Lothians (excl Edinburgh)		Scotland	
	Trips (000s)	Expenditure (£m)	Trips (000s)	Expenditure (£m)	Trips (000s)	Expenditure (£m)	Trips (000s)	Expenditure (£m)
Domestic Total	2,463	604	2,148	558	315	46	12,122	2,889
Overseas Total	1,355	625	1,303	593	52	32	2,443	1,680
TOTAL	3,818	1,229	3,451	1,151	367	78	14,565	4,569
<i>Source: VisitScotland, Tourism in Scotland's Regions 2013</i>								

The table shows that Edinburgh and the Lothians visitors, both domestic and overseas, made a total of 3,818,000 trips to Edinburgh and the Lothians in 2013. If it is considered that 3,451,000 of these trips were made solely to Edinburgh, this leaves **367,000** visits made to the surrounding areas. The Lothians tourist market therefore represents approximately 9.6% of the total Edinburgh & Lothians tourist market, and approximately 2.5% of the total Scotland tourist market. Assuming that a portion of the Lothians tourist market were visiting Mid and West Lothian, the

number of tourists visiting East Lothian will have been less than 367,000. Note that this figure for the Lothians represented a reduction of 110,000 visits (-23%) on the volume of tourism experienced in 2012. During the same period there was also a reduction in visits to Edinburgh and Scotland however at -7.6% and -2.8% respectively this was considerably less sharp.

Overseas and domestic visitors spent a total of approximately £1,229 million while visiting Edinburgh and the Lothians. Again taking into account the fact that £1.151 million was spent in Edinburgh alone, this leaves a total spend of approximately £78 million in the Lothians in 2013. This represents approximately 6.3% of total tourist expenditure in Edinburgh and Lothians, and approximately 1.7% of total tourist expenditure in Scotland. This represents a reduction of £17 million tourist spend (-17.9%) in the Lothians from that during 2012 (£95 million). Again this is a higher reduction than that experienced in Edinburgh (-9.2%) and across Scotland where tourist expenditure actually grew (+6.5%).

The close proximity to Edinburgh will inevitably present a challenge for East Lothian attractions in attracting the tourist market. However, with a reduction in visits and spend from 2012 to 2013 it is apparent that the current context is particularly challenging. That said, North Berwick has a strong visitor offer and as such is one of the top visited areas in the region amongst this somewhat challenging tourist market.

4.6 Market Size Summary

The following table summarises the total potential market for the North Berwick Arts Centre. Education, and the individual figures identified for North Berwick town and the Coastal Ward, have been excluded from the final total to avoid double-counting.

TABLE 4.6 MARKET SIZE SUMMARY	
Market	Population
Town	6,380
Ward	12,648
Local (30 min drive time total)	98,170
Day Trip (31 - 60 min drive time total)	611,129
Tourist (Lothians excl Edin)	367,000
Education (North Berwick)	1,623
Education (East Lothian)	13,568
TOTAL	1,076,299

The total potential market for the Arts Centre encompasses approximately 1.08 million people. Due to the nature of the proposed Arts Centre, the local market, particularly that located within the 15 minute drive time of North Berwick will be the core market from which it would expect to attract repeat visits to performances (approximately 24,500 people). North Berwick also has a sizeable potential day trip market (approximately 611,000) which is larger than the potential

tourist market (under 367,000 owing to the fact that the above figure includes all Lothians outwith Edinburgh). However, with an overnight stay tourists will have more opportunity to include a visit to the centre during their stay. Thus it is apparent that the local market, particularly the more immediate local market, is the primary market for an Arts Centre in North Berwick with the day trip and particularly tourist markets as important secondary markets.

4.7 Visitor Profile

The following section explores the profile and motivations of the tourist market in more detail.

4.7.1 Seasonality

VisitScotland regional profile data provides figures on the seasonality of the domestic tourist market (figures for the overseas market are not provided). Based on the supplied figures pertaining to Edinburgh & Lothians and Edinburgh, the seasonality of the Lothians domestic tourist market has been calculated. Note that the Lothians includes Mid Lothian and West Lothian as well as East Lothian.

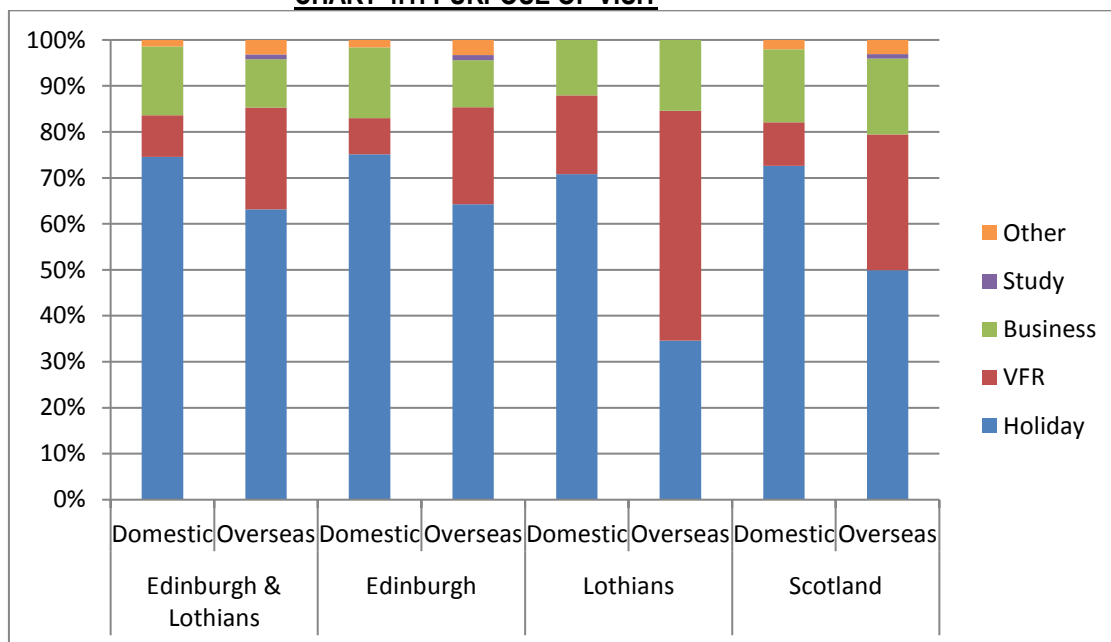
TABLE 4.7 LOTHIANS DOMESTIC TOURIST MARKET SEASONALITY					
Season	Scotland	Edinburgh & Lothians	Edinburgh	Lothians	Lothians 2012
Jan-Mar	18%	19%	20%	13%	17%
Apr-Jun	28%	26%	24%	44%	25%
Jul-Sep	33%	30%	30%	23%	33%
Oct-Dec	21%	26%	26%	21%	25%
Source: VisitScotland, <i>Tourism in Scotland's Regions 2013</i>					

The table above indicates that in 2013 April to June was the Lothians' strongest domestic tourism season (44%), significantly higher than all other seasons with July to September being the second strongest (23%). This is at odds with the three other regions depicted where July to September is typically the strongest quarter. Closer investigation of the monthly breakdown reveals that this is attributable to a particularly strong performance during May 2013 which alone accounted for 26% of domestic tourist visits across the year. In 2012 the Lothians domestic tourist market seasonality closely mirrored that experienced at across the other area levels indicating that the 2013 seasonality is not typical. Going by the 2013 and 2012 seasonality it is apparent that the spring/summer months are the region's strongest for domestic tourism with a reasonably sustained seasonality until December. January to March is the Lothians' weakest season. This will have implications on programming decisions and also capacity requirements, the latter during the peak months in particular.

4.7.2 Purpose of Trip

The chart below outlines the purpose of domestic and overseas tourist trips (*VisitScotland, Tourism in Scotland's Regions 2013*). Again figures for the Lothians have been calculated based on the stated Edinburgh & Lothians and Edinburgh figures.

CHART 4.1: PURPOSE OF VISIT



The chart reveals that the trends in purpose for domestic visits to the Lothians largely mirror those for Edinburgh and Scotland (a majority of around 70-75% visit for a holiday across the three areas). Conversely, a significantly lower amount of overseas tourists to the Lothians are visiting for a holiday, approximately 35% compared to approximately 63% in Edinburgh and 50% in Scotland. In the Lothians a higher proportion of overseas tourists are there to visit friends and relatives than elsewhere (approximately 50% compared to 21% of overseas tourists to Edinburgh and 30% of overseas tourists to Scotland).

Tourists visiting as part of a holiday will have the most time and the most inclination to visit visitor attractions followed by those visiting friends and family. This information therefore indicates the potential for an Arts Centre to encourage visits from domestic tourists to North Berwick and the surrounding area in particular.

4.8 Arts Engagement

Taking Part is a household survey in England which explores participation in the cultural sectors (*Taking Part* does not extend to Scotland). This section considers the key findings relating to arts participation over the past 5 years taken from the 2012/13 Quarter 4 report.

- 78% of adults had attended or participated in the arts in 2012/13. This represents a significant increase of 2.7% since 2008/09
- 64.1% of adults had engaged with the arts 3 or more times in 2012/13, a significant increase of 4.2% from 59.9% in 2008/08
- 21.6% of adults had not engaged with the arts at all. This represents a significant decrease of 2.5% from 24.1% in 2008/09
- Adults aged 65-74 and 75+ have seen a significant increase in engagement in recent years. Engagement amongst those aged 65-74 has increased by 7% over the past 5 years, and by 4.4% amongst those aged 75+. That said, engagement amongst adults aged 75 and over is still significantly lower in comparison to other age groups (64.3% in 2012/13 compared with approximately 80% amongst all other age groups)

The above analysis indicates overall growth in arts engagement in England over the past 5 years with figures pertaining to the reduction in adults having no engagement and those engaging 3 or more times particularly encouraging. Whilst this growth is evidenced across all age groups engagement amongst those aged 75+ does remain significantly lower. This growth in arts engagement provides a positive context for the creation of a new Arts Centre in North Berwick and also indicates a key group with which engagement should be sought.

Comparing the English national arts participation figures with those identified by the survey participants in this study indicates how arts engagement in the North Berwick area varies depending on art form. The following table outlines the percentage of respondents who engaged with each pre-identified art form at least once per year:

TABLE 4.9 ARTS ENGAGEMENT NORTH BERWICK AREA	
Art Form	% Engaging at Least Once Per Year
Music	74%
Theatre	72%
Film	78%
Dance	49%
Painting	45%
Sculpture	26%
Photography	28%
Design	24%
Interactive Media	14%

Arts engagement in the North Berwick area mirrored the English national average for film only (78%). For no categories did arts engagement in the North Berwick area exceed the English national average. Engagement with music and theatre came close (74% and 72% respectively). Less than 50% of respondents engaged with all other forms of art at least once per year with interactive media representing the lowest engagement (14%).

This data further indicates the significance of music, theatre and film for the North Berwick and surrounding area audiences. It also highlights the opportunity for growth in engagement a new arts facility could provide.

4.9 North Berwick Arts

North Berwick has a vibrant, and growing, arts community featuring a wide range of community groups encompassing a variety of arts disciplines and specialisms, art galleries and festivals. The following outlines some of the main galleries and arts groups active in the North Berwick area.

Art Galleries

- Tantallon Arts & Crafts Studios – working artists' studio offering art classes in drawing, painting, ceramics and design (also offers holiday accommodation)
- Breeze Art Gallery – specialises in a wide range of high quality contemporary art and hand-crafted bespoke furniture. Work with over 100 artists and hold in excess of 3,000 pieces at any one time (one of several branches across Scotland)
- Fidra Fine Art – exhibitions and works for sale
- Greens & Blues – exhibitions with works for sale
- Tippecanoe Gallery – gallery and gift shop
- Westgate Galleries – gallery, gift shop and coffee shop

Arts Groups / Events

- North Berwick Fringe By the Sea – music, theatre and comedy festival running for one week in August concurrently with the Edinburgh Festival. Features over 100 performances in and around North Berwick with additional capacity created with the erection two Spiegeltents by the Harbour
- North Berwick Art Group - 80 members; hold 2-3 exhibitions per annum in the Hope Room which provides an opportunity for members to show the year's work and for visitors to buy original local artwork; runs weekly Friday morning drop-in sessions
- North Berwick Drama Circle – have previously used St Andrew Blackadder Church Hall North for their annual performance however this has presented a number of challenges and limitations. The Circle is currently reviewing other possible performance and rehearsal space.
- North Berwick Movies – community cinema with showings at the Freemasons Hall on the third Saturday of each month. Currently running a family matinee and evening movie
- North Berwick Sings - approximately 35-40 participants
- Sparkly Arts – performing art classes for children held at North Berwick Community Centre
- Tyne and Esk Writers
- Red Flame Dance – dance, music and fitness classes for children held at Star of the Sea Catholic Church Hall, North Berwick
- Street Beats Samba Drumming

- Creative Embroidery Group

The above indicates the existence of an audience with a strong interest in arts and therefore inclination to use an Arts Centre.

4.10 Competitor Analysis

This section examines the potential of competitor venues in and around the North Berwick area to fulfil a similar function to the proposed Arts Centre.

4.10.1 East Lothian Arts Venues

There are no dedicated arts performance facilities in North Berwick or the surrounding area. The closest purpose-built facility is the Brunton Theatre in Musselburgh (approximately 35 minutes drive from North Berwick). The Brunton Theatre offers 3 spaces for performance and hire (366 capacity theatre and 500 capacity 'Venue 1' and 250 capacity 'Venue 2'). Venues 1 and 2 were recently subject to a major refurbishment which was completed in 2012. The Brunton Theatre offers music, theatre, dance, comedy, children's shows, and films year round (a high quality artistic performance programme which the recent refurbishment has enabled the Brunton Theatre Trust to extend). The programme includes touring performances, tribute acts, classical music, talks and lunchtime performances. It also offers a bar and bistro. In terms of activity the theatre runs a youth theatre programme and community activities (see Appendix C, p.105, for full details).

Informed by discussions with East Lothian Council's Principal Arts Officer, a new North Berwick Arts Centre is not considered to present strong competition for the Brunton Theatre. A North Berwick Arts Centre would be principally used by the immediate local market (who currently face difficulty travelling to Musselburgh) and visitors to the attractive seaside town – the Brunton Theatre's catchment is primarily located within its immediate vicinity. Further, there is potential for the programming at the North Berwick Arts Centre to complement that at the Brunton Theatre. Several performers have enquired about the potential to perform elsewhere in East Lothian however the lack of dedicated performance venues currently negates this. It was felt that a performance venue with a seating capacity of approximately 200 could provide this opportunity to a number of smaller-scale professional or semi-professional performers currently featuring in the Brunton Theatre programme.

The majority of the local community arts groups tend to use the North Berwick Community Centre or various church/town halls as venues for their meetings/classes/performances. An audit was performed that identified twelve central North Berwick venues that are capable of accommodating arts related performances or activities of the type proposed for the North Berwick Arts Centre (see Appendix C, p.106 for full details). This includes a wide range of venue types including hotels, schools, churches, Masonic halls, a sports centre and the Community Centre. Whilst

some are capable of accommodating larger performances or screenings, there is no purpose built facility meaning there can be many restrictions and limitations in terms of facilities, set-up, seating and (in the case of churches in particular) content restrictions.

The North Berwick Community Centre is perhaps the closest competitor for the Arts Centre. It comprises the following facilities:

- Main hall – can accommodate 120 people seated in rows. Currently used for gymnastic classes, computer classes, playgroup, Samba Drumming
- Small hall – can accommodate 60 people seated. Currently used by EL Youth Theatre, Ballet, Brownies, North Berwick Sings
- Pottery room – can accommodate 10 + tutor. Used by adults enrolled for pottery in East Lothian Adult Education Programme
- Art room – can accommodate 30 people. Natural light, good views

Whilst offering a number of facilities for the arts, the North Berwick Community Centre does not exclusively cater for such activity and is heavily used by a variety of groups across the local community so much that it cannot cater for demand. The Community Centre currently accommodates many regular bookings meaning it cannot accommodate new classes and groups or respond to one-off bookings such as festivals, exhibitions or other such events. Further, a lack of dedicated performance space ensures its use is primarily for community classes and activities rather than for drama, music or film performances.

The Community Centre has recently been closed for refurbishment which has highlighted the issues with alternative spaces in the local community. Further, the impending closure of theSPACE, skate-park with dedicated music room, cinema/games room and a café, means that existing facilities will be in even higher demand, many of which are not fit for purpose for the types of activities currently held at theSPACE.

Across the North Berwick venues capacity ranges from below 50 (County Hotel) to 350 (St Andrew Blackadder Hall and Church). The majority of venues offer a capacity in the region of 100 heads which, for some arts performance types, is too small.

In terms of availability many of the existing venues are provided on an ad hoc basis depending on the demand surrounding their primary usage. None of the venues have a primarily arts related purpose meaning that any performance must compete for availability with other events or functions for which the venues cater.

The cost of venue hire varies and generally reflects the size of venue and the facilities required, particularly if the venue is required to provide additional staff. Hourly charges range from £10 (North Berwick Community Centre during weekdays) to £50 (North Berwick Rugby Club). St Andrew Blackadder Church charges a flat rate of £150. There is often an additional charge for

weekend bookings (e.g. North Berwick Community Centre charges an additional £5 per hour). Certain venues also charge for tasks which could not be performed by volunteers, such as staffing the bar (County Hotel), or janitor costs (High School Hall).

A minor refurbishment at the Haddington Corn exchange has recently been completed. Plans are also underway to deliver a more significant redevelopment transforming the 160 year old building into a 900-capacity concert hall. The project is being led by Haddington Community Development Trust. The Trust is currently facing challenges compiling a funding package for the project and as such the project's future is by no means certain. Both the current and proposed programme will predominantly focus on live music performances and as such it does not present direct competition for an Arts Centre in North Berwick delivering a broader arts-based programme. Where live music would feature at a North Berwick Arts Centre complementary programming would be important to minimise competition with the Haddington Corn Exchange. Together the two developments could significantly increase access to the arts in East Lothian and there may be opportunities for partnership working in terms of activity programming.

Given the width and depth of the arts community within North Berwick demonstrated above (and across the wider local area) the lack of a dedicated arts facility is noteworthy in its absence. Whilst there are numerous other venues available for hire there are a number of significant limitations with them, particularly for larger drama, music and film performances. The Brunton Theatre in Musselburgh does offer a potential venue for performances however this offers limited opportunity for local amateur performances and is considered to be located too far away for many locals to encourage more regular arts engagement.

4.10.2 North Berwick Cafes/Bistros

It is proposed that the North Berwick Arts Centre includes a café/bar facility. The comparator analysis indicates that this is fundamental aspect of the visitor offer at an arts centre. During September 2014 an audit was performed of the current café/bar facilities in and around North Berwick (see Appendix C, p.107). Those operating as cafes or cafes/bistros with evening dining have been selected for consideration based on the models featuring in the comparator analysis. The purpose of the audit is to indicate the level of competition that currently exists and therefore any gap in the market or opportunity for such a facility at a new Arts Centre.

The audit indicates a high level of café provision in and around the centre of North Berwick. These are predominantly cafes serving breakfasts, lunches, coffee with many serving cakes and snacks. One recent addition to the North Berwick catering scene, Herringbone, provides an offer akin to the bistro/bar approach that is suggested for the Arts Centre. Herringbone is open 7 days per week from 9am until between 9pm and midnight depending on the day of the week. Others that offer later openings and a bistro/bar offer (e.g. Rocketeer, Zitto's and Signals Bistro) are marketed more as restaurants rather than cafes.

With the exception of Herringbone, there are few café/bistro-type establishments that extend to evening meals. JP's Deli and Café has branched out in to this however it only offers evening dining two Saturdays per month. Further, few of the catering establishments market themselves as bars (Zitto's being the exception). The vast majority of the café-type catering establishments operate daily from around 9/10am to 5/6pm.

The above audit indicates that whilst there are numerous catering establishments in the vicinity of where the Arts Centre would likely be located, there is a gap in the market for an establishment that offers day and evening catering and also functions as a bar – the model offered in several of the comparator arts centres. With the introduction of Herringbone and a selection of cafes piloting evening openings it is apparent that North Berwick catering establishments are beginning to address this developing market opportunity. Inclusion of such an offer in an Arts Centre would provide a varied choice for visitors and locals alike however there is the risk that by the time it becomes operational competition will have increased.

4.10.3 Visitor Attractions

The table below displays the visit numbers to East Lothian visitor attractions in 2013. Data derives from the Moffat Centre *Visitor Attraction Monitor* and therefore only includes attractions which participated in the survey. Those in bold are located in North Berwick or its near vicinity.

**TABLE 4.10
EAST LOTHIAN ATTRACTIONS VISITS**

Attraction	2009	2010	2011	2012	2013	Change 12 to 13
Scottish Seabird Centre, North Berwick	288,458	276,434	277,263	267,549	271, 443	1.5
East Links Family Park, Dunbar	DK	DK	DK	DK	101,000	DK
National Museum of Flight, nr Haddington	82,002	77,030	71,564	72,200	70,116	-2.1
John Muir Country Park, Dunbar	29,439	14,195	E 270,000	E 250,000	DK	
Tantallon Castle, North Berwick	30,819	28,564	28,336	31,811	35,370	11.2
Glenkinchie Distillery, Tranent	23,634	26,529	29,232	27,695	E 32,192	16.2
Dirleton Castle, Dirleton	23,344	24,402	26,301	25,395	24,136	-5.0
The John Gray Centre, Haddington	DK	DK	Not Open	E 13,234	E 9,020	-31.8
Dunbar Town House Museum, Dunbar	DK	DK	Closed	6,643	6,836	5.1
Newhailes, Musselburgh	5,676	5,059	9,267	8,004	4,307	-46.2
Prestongrange Museum, Prestongrange	8,246	4,781	E 6,894	E 7,933	DK	
Musselburgh Museum, Musselburgh	DK	DK	Closed	3,017	E 3,101	2.8
Seton Collegiate Church, Longniddry	3,037	2,172	2,414	2,201	2,529	14.9
St Mary's Parish Church, Haddington	4,555	3,314	4,048	2,260	2,333	3.2
Preston Mill and Phantassie Doocot, East Linton	2,055	2,208	2,461	2,660	2,298	-13.6
Inveresk Lodge Garden, Musselburgh	1,845	2,297	1,622	1,613	1,294	-19.8
Gosford House, Longniddry	786	892	845	1,066	1,023	-4.0
Saltire Flag Site, Athelstaneford	929	E 916	E 838	E 882	E 819	-7.1

Source: Moffat Centre, Visitor Attraction Monitor, 2013

Across the East Lothian region four tiers of attractions are observed. This includes one headline attraction attracting almost 300,000 visits; three significant attractions attracting from 70,000 to 100,000 visits; three moderate attractions attracting 25,000 to 35,000 visits and eleven small-scale attractions attracting no more than 10,000 visits.

It is a North Berwick attraction, The Scottish Seabird Centre, that is the region's headline attraction (271,443 visits in 2013). This represents a +1.5% increase on the 2012 performance. It should be noted that the Seabird Centre visits figure includes paying visitors, members and café visits. We estimate that paying visits account for between 10% and 15% of the reported visits.

The Scottish Seabird Centre was also the only North Berwick based attraction to feature. Located in close proximity to North Berwick, Tantallon Castle can be considered a moderate attraction with 35,370 visits in 2013. This represented an increase of +11.9% on the 2012 performance. The other attraction in particularly close proximity to North Berwick is the Saltire Flag Site in Athelstaneford which attracted considerably less visits (estimated 819).

Other attractions located in North Berwick but absent from the Moffat Centre data include Bass Rock Boat Trips; Berwick Law, a popular walking hill-climb affording panoramic views of East Lothian and beyond; The Lodge Grounds, a public park with formal garden, aviary and children's area; and several golfing related activities (three golf courses and two more family focused pitch-and-putt activities). The beach is also a key draw for many visitors.

Analysis of the performance of East Lothian attractions indicates that North Berwick attracts a high volume of visits in and around the immediate vicinity of the proposed North Berwick Arts Centre. The Scottish Seabird Centre in particular demonstrates how successful an attraction with a paid element and free-to-enter café can be and depending on the location of the Arts Centre there is potential for it to tap in to a similar market. Given the fact that many of North Berwick's attractions relate to the natural landscape it is apparent that this is a key draw for visitors. The creation of an Arts Centre is therefore unlikely to become an attractor in its own right but it does have the potential to enhance the existing visitor offer and therefore overall appeal of visiting North Berwick.

4.11 Key Messages

The box below presents the key messages highlighted by the market appraisal.

- The local market comprises approximately 100,000 people. Within this, the immediate locality (North Berwick Coastal Ward, Haddington and Dunbar – approximately 25,000 people) is considered to be the primary market for a North Berwick Arts Centre, particularly performances.
- Whilst the North Berwick Coastal Ward has proportionately low rates of deprivation across all indicators there are a number of socio-economic issues a new arts centre could address. This includes providing recreational opportunities for an aging and an access deprived population promoting community involvement and cohesion as a result and offering opportunities for post-school training and skills development for young people.
- Owing to the close proximity of Edinburgh, North Berwick has a sizeable day trip market.
- Numerically the tourist market for the area is modest however, with a sizeable proportion of domestic tourists visiting for a holiday, there would be opportunities for an Arts Centre to attract this market, particularly in the summer season.
- The popularity of North Berwick amongst visitors is evidenced by the performance of the Scottish Seabird Centre, East Lothian's headline attraction. Given that many visitors to the Seabird Centre are visiting the café only there is potential for an Arts Centre with café to tap in to this market also. Many of North Berwick's other attractions relate to the natural landscape making it apparent that this is a key draw amongst visitors. The creation of an Arts Centre is therefore unlikely to become an attractor in its own right but it does have the potential to enhance the appeal of visiting North Berwick as part of a day trip or holiday.
- Central location and inclusion of a café would be key components for all markets.
- National figures indicate a significant growth in arts engagement; however engagement amongst the older age groups remains comparatively low. Comparison between the English national figures and figures amongst survey respondents canvassed as part of this study indicates lower average engagement across all art forms (however comparable engagement with respect to film, theatre and music). This indicates the potential opportunity for a new arts facility to contribute to a growth in arts engagement across the North Berwick area.
- Demand for space hire in North Berwick is currently extremely high. The principal venue accommodating community hire cannot meet demand.
- North Berwick currently has a vibrant arts community featuring a wide range of community groups encompassing a variety of different arts disciplines and specialisms, art galleries and festivals. The lack of a dedicated facility is therefore noteworthy in its absence. There are a series of issues and limitations surrounding the various venues which are available for hire in North Berwick. The nearest purpose-built venue is the Brunton Theatre in Musselburgh which is not considered a direct competitor but in fact a North Berwick Arts Centre offers potential to complement the offer here increasing access to the arts across East Lothian.
- There is a high level of café provision in and around the centre of North Berwick. There are relatively few establishments offering a bistro type offer (the model provided in several of the comparator arts centres) although this is something that is beginning to emerge.

5.0 FEASIBILITY ASSESSMENT

5.1 Introduction

This section assesses the feasibility of an Arts Centre located in North Berwick. The North Berwick Arts Centre Steering Group indicated that there were two key options they were considering. These were as follows:

Option 1: Iconic Theatre Arts Centre	Option 2: Local Theatre Arts Centre
<ul style="list-style-type: none"> • 600 seat theatre / cinema with live digital streaming • Studio theatre / dance / black box space capable of accommodating up to 150 people seated • Dressing rooms / small meeting rooms • Rehearsal studio • Scenery / props storage / backstage • Control room / tech / TV / radio / podcast / webcast studio • Reception area / exhibition space / shop • Booking office / reception • Admin offices / managers office • Children's area / party area • Café / restaurant / bar / snacks • Bar / interval / green room • Art studios / small cinema • Training room / activity room 	<ul style="list-style-type: none"> • 250 seat theatre / cinema with live digital streaming • Studio / small cinema space capable of accommodating up to 100 people standing • Dressing rooms / backstage storage • Tech room • Reception / booking office / admin offices • Reception hall / exhibition / meeting • Café / bar / snacks • Meeting rooms

This section establishes whether the Steering Group should pursue an 'iconic theatre,' 'local theatre' or indeed an alternative arts centre model. This recommendation will be informed by the visit numbers the market is anticipated to support and the associated programming requirements. This will indicate the number and maximum capacity of the spaces a North Berwick Arts Centre could feasibly support. This analysis will be informed by the consultation, comparator analysis and market appraisal findings.

The assessment will then explore the sustainability of the outlined Arts Centre examining the associated income and expenditure.

The final stage in the feasibility assessment will explore the deliverability of the centre as a new build or existing building redevelopment and the associated funding options.

5.2 Visits, Programming and Capacity Assessment

5.2.1 Performance Visits

It is considered that the performance function of an Arts Centre would be the key driver for visits and the key source of income generation. The survey consultation and comparator analysis clearly indicates the demand and precedent for an Arts Centre with film, theatre and music performance at the core. Current engagement with each of these art forms amongst survey respondents is outlined below.

It is considered that the 24,500 population within the North Berwick Coastal Ward and approximately half of the Haddington & Lammermuir and Dunbar & East Linton wards would be the primary attendees at arts related performances. Taking those who attend arts activities weekly, fortnightly, monthly and quarterly (rates from the survey data) it is possible to ascertain the approximate size of the 'currently engaged' arts market within that immediate local area. This has been calculated in the table below.

TABLE 5.1 LOCAL ART ENGAGED AUDIENCE ARTS VISITS PER ANNUM						
	Current Frequency of Engagement			Av. Freq. of Engagement	No. of People (out of 24,500 population)	No. of Visits Per Annum
	Film	Music	Theatre			
Weekly (x52)	1%	6%	2%	3%	735	38,220
Fortnightly (x26)	4%	1%	1%	2%	490	12,740
Monthly (x12)	15%	10%	5%	10%	2,450	29,400
Quarterly (x4)	33%	19%	11%	21%	5,145	20,580
Total	53%	36%	19%	36%	8,820	100,940

Taking an average frequency of engagement across the three core arts areas of film, music and theatre indicates an average of approximately **101,000 visits** to film, music and theatre performances made by approximately 8,800 people within the immediate local market per annum (approximately 36% of the immediate local population). This equates to an average of 11.4 attendances at arts-related performances by members of the local community who can be considered engaged in arts.

The survey research indicated that 60% of all respondents would use a North Berwick Arts Centre. It would be unrealistic to assume that a new Arts Centre could completely change current behaviour and encourage all existing users to only use the new venue. It is inevitable that, for a variety of reasons, people will continue to make use of existing facilities, particularly those who are resident out with the North Berwick Coastal Ward itself (approximately half of the identified immediate local market). Taking this into consideration it has been prudently assumed that 25% of all visits currently made by that arts engaged audience within the immediate local market could transfer to a new Arts Centre. This equates to approximately **25,200 visits** per annum.

In addition to attracting the currently engaged arts audience, a new Arts Centre located in North Berwick would encourage increased participation amongst the less or non-engaged audiences, particularly those that cite lack of venues and/or location as amongst the key issues for arts provision in East Lothian (32% and 24% of survey respondents respectively). It is considered that approximately 10% more visits could be achieved through attendance from members of the immediate local market who are currently 'less engaged' with the arts (approximately 2,500 visits per annum).

Evidence from the survey and market appraisal combined therefore suggests that a new Arts Centre located in North Berwick could expect to attract approximately **27,800 visits** to film, theatre and/or music performances from the immediate local market.

The wider local market, day trip and tourist markets are viewed as secondary arts performance attendees. As explored in the market appraisal, such audiences typically visit North Berwick to enjoy the scenery and other activities currently enjoyed as part of a day out or holiday to this popular East Lothian seaside town. They are unlikely to visit North Berwick because there is an Arts Centre there but some may take in a performance whilst they are there, particularly in inclement weather. Thus there will be additional performance visits from these markets, the tourist market in particular owing to the prolonged length of time spent in the town and therefore increased opportunity to attend. It is however difficult to ascertain how many additional visits will be attributable to these secondary markets given that the Arts Centre will not be the determining factor in their decision to visit. Accordingly, for the purposes of the feasibility study these markets have been omitted and the above 27,800 performance visits can be considered the minimum a new Arts Centre could attract.

Such markets are however considered to have a higher propensity to use a café facility at an arts centre during their trip or holiday to the town. Café visits are explored in Section 5.2.3 below.

5.2.2 Performance Programme

The following table sets out an indicative annual performance programme for a North Berwick Arts Centre. This is informed by the programming at comparators and the anticipated engagement figures amongst local market residents.

TABLE 5.2 PERFORMANCE PROGRAMME			
Performance Type	Description	Av. Frequency	No. Per Annum
Film	Mix of latest release / specialist etc	2 per week	104
Music	Local performances	2 nights per month	24
	Touring performances	2 nights per month	24
Drama	Community Production	2 x 5 nights	10
	Touring Production	10 x 3 nights	30
	Festival Production	5 nights during Fringe By the Sea	5
Comedy	Touring performance	1 per month	12
Dance	Touring / local performance	1 every 2 months	6
Talks	Local expert talks	1 every 2 months	6
TOTAL			221

As previously stated, film, music and drama performance form the core of the performance programme however comedy, dance and talks also feature. Film is the most numerous performance type (2 showings per week). Overall it is anticipated that a North Berwick Arts Centre could host **221 performances in the main auditorium space** per annum (an average of 4.25 per week – assuming year round operation).

Through further analysis of the above performance programme it is possible to explore maximum capacity scenarios and triangulate this with the assumptions underpinning the performance programme and anticipated minimum visit number in order to test their validity. The following table considers three maximum capacity scenarios.

TABLE 5.3 MAXIMUM CAPACITY SCENARIOS			
	Scenario 1	Scenario 2	Scenario 3
Assumed auditorium capacity	150	200	250
All performances at maximum capacity	33,150	44,200	55,250
Attendance Rate	60%	60%	60%
Performance Visits	19,890	26,520	33,150

Scenario 1 assumes a maximum main auditorium capacity of 150. Based on 221 performances per annum this equates to an accommodation potential of 33,150 per annum. An average attendance rate of 60% per performance has been assumed. This estimate has been prudently benchmarked against the performance of other Scottish theatres including the Brunton Theatre which operated at 70% capacity in 2012/13 (*Brunton Theatre Trust, Trustees' Report and Financial Statements*). This results in 19,890 attendances per annum.

Scenario 2 assumes a maximum main auditorium capacity of 200. Based on 221 performances per annum and an average attendance of 60%, this results in a total attendance figure of 26,520 per annum.

Scenario 3 assumes a maximum main auditorium capacity of 250. Based on 221 performances per annum and an average attendance of 60%, this results in a total attendance figure of 33,150 per annum.

The calculated performance visits per annum under Scenario 2 (26,520 visits) closely mirrors the projected minimum main auditorium visit numbers calculated above based on the market appraisal and consultation analysis (27,800 visits). This indicates the suitability of a 200 capacity auditorium. Should the Arts Centre effectively draw more of the local market or increased repeat visits than our prudent estimations suggest, the 200 capacity auditorium could also support an increased number of attendees (by an average of 40% for all performances and therefore up to a maximum of approximately 37,100 performance visits per annum based on a programme of 221 performances). Should the Arts Centre be in a position to expand its performance programme there is potential for further visit number growth.

A maximum capacity of 150 is too low and could result in an inability to meet demand particularly during the most popular performances or should the local arts market experience increased growth in years to come. Conversely, achieving an average 60% attendance rate within a 250 capacity auditorium will be more challenging and is likely to require a more mass-appeal programme and significant marketing. There could be less opportunity to offer a varied arts programme which would undermine a key objective of the centre.

The temptation to develop a larger auditorium than is justified by the user market appraisal should be resisted. A half-empty (or worse) auditorium impacts on the experience of the audience and while various strategies have been adopted to address the operation of larger auditoria for smaller audiences this is notoriously difficult. It may be possible for the design solution for the building to allow the main auditorium and studio space to be combined without adversely impacting on the functionality or construction cost of either space. This would enable the provision of a larger facility should this ever be required to accommodate special events.

5.2.3 Café Visits

Whilst there is a high level of café provision in and around the centre of North Berwick, there are relatively few establishments offering the bistro-type offer as is typical amongst the arts centre comparators, although this is something which is beginning to emerge within the town and may present increased competition by the time the Arts Centre would be operational. A café/bistro will appeal to locals and visitors alike. This will include 'Arts Centre users' who are attending performances or classes and 'café users' who are visiting purely for the catering.

It is anticipated that a catering establishment within the Arts Centre could attract a total of approximately **32,500 visits per annum**. This is based on the following assumptions:

- A quality bistro-type facility offering light meals, snacks, coffees and alcoholic beverages throughout the day and evening (year round opening related to performance with standard café hours 10am to 5pm 5 or 6 days per week)
- Significant usage by Arts Centre performance attendees who would make use of the facility for meals, snacks or drinks before, after or during the performance they are paying to attend. It is assumed that on average half of all visits to paid performances would feature usage of the catering/bar facility per annum (approximately 13,900 café visits per annum)
- Significant usage amongst the local market resident within a 30 minute drive time of the centre (approximately 11,800 visits per annum). This includes those visiting primarily for the café/bar facility and those attending community classes etc in a separate studio space. It is assumed that 6% of the local market would frequent the catering facility an average of 2 times per annum. It should be noted that this will largely comprise residents of the North Berwick Coastal Ward.
- Modest usage amongst the day trip and tourist markets who will be presented with numerous alternative dining options during their visit (highest volume during the summer)

The following table sets out the anticipated visit numbers to a café facility of this nature.

TABLE 5.4 CAFÉ VISIT NUMBERS					
	Market Size		Penetration Rate	Repeat Visit Factor	Café Visits
Arts Centre Performance		27,759	50.00%	NA	13,879
Café	Local	98,170	6.00%	2	11,780
	Day Trip	611,129	0.70%	1	4,278
	Tourist	367,000	0.70%	1	2,569
Total					32,507

This equates to an increase of approximately 17% on the number of anticipated visits to performances at the main auditorium per annum.

It is recommended that the café/bistro/bar facility accommodates a minimum **of 35 covers**, with room for extension (possibly into to the foyer area or outdoors) during particularly popular performances and during higher footfall days. This is based on benchmarking against similar catering establishments in arts and performance venues.

5.2.4 Arts Centre Preferred Option

The visit number and capacity analysis supports adoption of a model along the lines of the 'Local Arts Centre' identified by the Steering Group. In order for a venue of this nature to effectively

accommodate the desired varied programme of arts performances, film screenings, local community classes, meetings and exhibitions (as identified through the consultation process) it will be crucial that the spaces are flexible and adaptive. An outline of the key facilities, uses, requirements and assumptions underpinning an Arts Centre of the 'local' model is provided below.

Facilities	Description
Main Auditorium	Capable of hosting drama and music performances and cinema screenings, including live digital streaming Complete with stage and flexible seating configuration Capacity of 200 seated
Studio Space	Flexible space capable of accommodating various community arts groups, smaller scale performances, exhibitions, additional cinema screenings when the main auditorium is in use, meetings and functions. No fixed seating and opportunity to partition areas off and ideally opportunity to remove partition wall with main auditorium and create one larger space (300 seated) Seated capacity of 100 (approximately 80 m ²)
Café/Bistro/Bar	Quality bistro-type facility offering light meals, snacks, coffees and alcoholic beverages throughout the day and evening Minimum capacity of 35 covers with opportunity to extend
Public toilets	Male, female and disabled toilets
Dressing rooms with toilets	Green room / Changing Rooms Opportunity to be used as meeting space when not required as dressing room This space could also function as a staff room for Arts Centre staff and volunteers
Backstage storage	Space to store seating, scenery, props and partitions. Important that space meets stage scenery height requirements
Reception area with exhibition space	Reception area where visitors can find out 'what's on' and purchase tickets. Space for small-scale exhibitions by local artists / community groups would also be desirable
Office space	Office space for staff
Car Parking	On-site car parking desirable. If this cannot be achieved close proximity to public transport terminals will be essential.
Programme	Varied programme anchored by film, music and drama performances. Approximately 221 performances per annum
Learning Academy	Training and learning opportunities provided through Learning Academy programme (see p.53 below for more details)
Visit Numbers	Approximately 27,800 paid visits to main auditorium performances per annum Approximately 32,500 visits to café/bistro/bar per annum
Hours/Seasonality	Facilities available for use 7 days per week Café open 7 days per week from 9am to 5pm. Extended hours during weekends and to coincide with evening screenings / performances

5.3 Income and Expenditure

5.3.1 Income

The following table presents the income projections for the above outlined North Berwick Arts Centre. Note that figures relate to the minimum 'steady state' when the above outlined performance programme would be delivered and visit numbers achieved. How soon the 'steady state' is achieved will depend on programming and the extent to which the new Arts Centre can change current arts engagement behaviour. It is anticipated this would take several years.

TABLE 5.5 INCOME PROJECTIONS	
Income Area	£
Admissions	
Cinema	72,800
Music	48,000
Theatre	54,000
Other	19,500
	194,300
Café/Bistro/Bar	9,750
Space Hire	7,488
TOTAL	211,538

It is anticipated that the North Berwick Arts Centre could expect to generate a minimum annual income of approximately £211,500. This is based on the following assumptions:

Admissions

Admissions income would be the main source of income generation. It is anticipated that approximately £194,300 would be generated through admissions to the main auditorium (92% of total income generated). Admissions income has been calculated for each arts performance type based on the proposed frequency and an average 60% attendance rate as per Table 5.2. An average admission charge per performance type has been identified based on the comparator analysis and adjusted to account for VAT. This is outlined in the table below.

TABLE 5.6
ADMISSIONS ASSUMPTIONS

Performance Type	Description	No. Per Annum	Max. Capacity	Attendance Rate	Av. Admission Charge (£)	Av. Income per Admission (£)	Income (£)
Film	Mix of latest release / specialist etc	104	200	60%	7	5.83	72,800
Music	Local performances	24	200	60%	5	4.17	12,000
	Touring performances	24	200	60%	15	12.5	36,000
Drama	Community Production	10	200	60%	5	4.17	5,000
	Touring Production	30	200	60%	15	12.5	45,000
	Festival Production	5	200	60%	8	6.67	4,000
Comedy	Touring performance	12	200	60%	10	8.33	12,000
Dance	Touring / local performance	6	200	60%	7.5	6.25	4,500
Talks	Local expert talks	6	200	60%	5	4.17	3,000
TOTAL		221			8.61	7.18	194,300

The above table demonstrates the importance of film screenings for income generation, owing to the frequency of its programming (£72,800 per annum). This emphasises the importance of selecting the appropriate film programme and timings. Touring performances also make a significant contribution to income generation, more so than local productions (income from touring drama productions, touring music performances and touring comedy performances combined is anticipated to be approximately (£93,000)). This stresses the importance of providing a facility and visitor experience that will render the North Berwick Arts Centre an attractive venue to such companies. Of course terms and conditions in terms of box office split will also be a key element for touring companies (this is explored in the expenditure calculations below, Section 5.3.2, p.50).

Café/Bistro/Bar

In order to minimise risk and remove the need for the Arts Centre to employ kitchen and serving staff for the café/bistro/bar facility, as is often the case with the comparator arts centres, it has been assumed that the facility would be run as a franchise. This could be a private, commercial franchise or part of a social enterprise-type project where a local community group becomes the franchisee. The latter would support the Steering Group's ambitions to deliver training opportunities and could therefore become part of the proposed Learning Academy (see Section 5.3.2 below for more details). Based on an average £3 spend per head across all café/bistro/bar visits (32,500) and a 10% return for the North Berwick Arts Centre, this results in a net café income of approximately £9,750.

Space Hire

Space hire encompasses the community arts classes and activities that would make use of the studio space and also hires by other non-arts related groups for any meetings or functions such as parties, fundraisers etc. It has been assumed that the studio space would be hired for an average of 12 hours per week at a rate of £12 per hour (slightly higher than the North Berwick

Community Centre due to the fact that the Arts Centre would boast purpose built arts facilities). This results in a gross income of approximately £6,240. 12 hours per week is considered a reasonable hire rate given the popularity of the North Berwick Community Centre.

5.3.2 Expenditure

The table below sets out the anticipated annual expenditure for the North Berwick Arts Centre.

TABLE 5.7 EXPENDITURE PROJECTIONS	
Expenditure Area	£
Performance Costs	
Film	29,120
Music	31,200
Theatre	36,000
Other	11,700
	108,020
Staff	
Arts Centre Director	43,200
Duty Manager	28,800
Receptionist/Administration	19,200
Technical Support Officer	21,600
	91,200
Building & Maintenance	
Lifecycle	27,405
Reactive Maintenance	16,065
Security, Waste, Cleaning	17,010
Light, Heat and Water	21,735
	82,215
Advertising & Marketing	25,000
TOTAL	281,435

It is anticipated that the North Berwick Arts Centre could expect to generate an annual expenditure of approximately £281,435. This is based on the following assumptions:

Performance Costs

Cost to buy-in films and performances has been calculated based on a box office split per performance type. In some cases performers will seek a guaranteed fee, particularly if there is uncertainty surrounding the popularity of the performance. However, this cannot be determined without knowing the specific artists and performances so all costs have been expressed as a box-office split whereby performers receive a percentage of ticket sales income. The table below sets out the performance costs calculations.

TABLE 5.8
PERFORMANCE COSTS

Performance Type	Description	Income (after VAT)	Box Office Split (Performer: Arts Centre)	Expenditure (£)	Net Income (£)
Film	Mix of latest release / specialist etc	72,800	40%: 60%	29,120	43,680
Music	Local performances	12,000	50%:50%	6,000	6,000
	Touring performances	36,000	70%:30%	25,200	10,800
Drama	Community Production	5,000	50%:50%	2,500	2,500
	Touring Production	45,000	70%:30%	31,500	13,500
	Festival Production	4,000	50%:50%	2,000	2,000
Comedy	Touring performance	12,000	70%:30%	8,400	3,600
Dance	Touring / local performance	4,500	60%:40%	2,700	1,800
Talks	Local expert talks	3,000	20%:80%	600	2,400
TOTAL				108,020	86,280

The cost of renting films from distributors has been assumed at 40%. Experience at other local cinemas and industry average statistics indicates that the cost is typically 35%-45% depending on the bargaining power of the cinema (and conversely the distributor), the reputation of the film/ critic's reviews, the release date of the film (whether its first run or not) and the expected income generated by the cinema through the showing of the film (number of screens, schedule etc). It has been assumed that the North Berwick Arts Centre would largely show first run films with an average rental cost of 40%. It has been assumed that all films will be digital and downloadable therefore removing all carry costs.

All touring performances have been allocated an average box-office split of 70%. This is based on our experience working with other arts centres of a similar model and scale. Community performances will demand a lower box-office split, here 50% has been assumed.

The total performance cost has been calculated at approximately £108,020. This would result in a net admissions income of approximately £86,280.

Staff

Four permanent full-time staff posts have been identified. These are as follows:

TABLE 5.9
ARTS CENTRE PERMANENT STAFF

Position	Description	FTE	Salary (£)	Cost (£ (Incl on-costs at 20%))
Director	Programme selection, negotiator with artists	1	36,000	43,200
Duty Manager	General Arts Centre manager	1	24,000	28,800
Receptionist/Administration	Performance bookings/ticket sales; programme information; telephone calls; maintaining spreadsheets etc	1	16,000	19,200
Technical Support Officer	Trained to operate lighting, sound, film projection, stage set-up etc	1	18,000	21,600
TOTAL				91,200

Volunteers

In addition to the above staff members, the North Berwick Arts Centre would require considerable volunteer support across a number of areas front and back of house. It is considered that the Centre would require the equivalent of 6 FTE positions filled by volunteers. Volunteer roles include:

- Ushers
- Booking/reception support
- Stage/seating set-up
- Marketing and communications
- Programme coordination support
- Café/bistro/bar support
- Volunteer coordinator

It is anticipated that several of the volunteer roles would be specifically targeted towards young people providing them with opportunities to gain real-life experience and develop key interpersonal and practical skills that will support their career development. Should the café/bistro/bar be run as a social enterprise this will offer further opportunities.

Whilst there was relatively low overall interest expressed in volunteering in the survey, many existing North Berwick arts groups (including those on the Steering Group) experience strong volunteer support. With an increasing amount of residents taking early retirement and further support of agencies such as STRIVE it is considered achievable to attract the support of the equivalent of 6 FTE volunteers.

Learning Academy

There will also be the opportunity for some of these roles to be filled by apprentices or interns. Such opportunities would be part of the Learning Academy programme. The Learning Academy would provide accreditation training and development opportunities for a range of members of the local community, particularly young people amongst whom enhancing employability and encouraging them to remain in the area as they advance their careers are key issues. Running

the café/bistro/bar facility as a social-enterprise franchise would be a core element of this. Intergenerational training and learning whereby skilled members of the local community share their skills and experience with young people would also be a key delivery mechanism within the programme. This could include retired local artists, actors, dancers, business people etc. amongst whom there is a strong contingent in North Berwick. The North Berwick Youth Project would work in partnership with the Arts Centre to deliver this. It is also the intention that the Learning Academy becomes a partner in East Lothian Works, the Council's employability projects providing advice and information on jobs, training and skills development to all members of the East Lothian population.

The Learning Academy would not generate income for the Arts Centre. It is however a crucial aspect of the project enhancing the socio-economic benefit for the local community. As such there are opportunities to secure separate funding specifically for the delivery of the programme (see Section 6.2, p.58 for further explanation). The Learning Academy has therefore not been included in the expenditure analysis above.

Building and Maintenance

Building and maintenance costs have been calculated based on an industry average per square meter. This average concerns existing buildings so there is potential for some modest cost savings should a new build option be pursued. In order to calculate such costs a notional scale for the Arts Centre has been identified as follows:

TABLE 5.10 ARTS CENTRE NOTIONAL SCALE	
Space	Area (m²)
Auditorium (incl. stage)	250
Studio	100
Café and Kitchen	100
Foyer	100
Toilets	50
Backstage/ scene dock / get-in	80
Dressing rooms/ green room/ backstage toilets	40
Storage	40
Circulation	100
Plant	40
Design Contingency	45
TOTAL	945

A notional scale of 945m² has been carried forward to the building cost calculations. These are as follows:

TABLE 5.11 BUILDING & MAINTENANCE			
	Rate Per m ² (new build)	Arts Centre Area (m ²)	Total Cost (£)
Lifecycle	29	945	27,405
Reactive Maintenance	17	945	16,065
Security, Waste, Cleaning	18	945	17,010
Light, Heat and Water	23	945	21,735
TOTAL			82,215

Advertising and Marketing

A budget of £25,000 for advertising and marketing has been identified. Scottish Arts Council guidance indicates an average of 8% of income generated is typically allocated to marketing. In this case, with a new arts centre that is seeking to change and increase existing behaviours an increased proportion of 12% has been assumed.

5.3.3 Operating Surplus/Deficit

The following table sets out the anticipated operating surplus for the North Berwick Arts Centre.

TABLE 5.12 OPERATING SURPLUS/ (DEFICIT)	
	£
Income	194,300
Expenditure	281,435
Surplus / (Deficit)	-87,135

An annual deficit of approximately -£87,135 is anticipated. This is not an unexpected outcome and closely mirrors the typical experience at local arts centres of a similar type to the model proposed for North Berwick. In order for the North Berwick Arts Centre to be considered sustainable therefore, it would require grant support either from local authority, organisations such as Creative Scotland or through a fundraising campaign.

5.4 Key Messages

The box below summarises the key messages revealed by the feasibility assessment:

- An Arts Centre of the 'local' model is recommended. Core elements should include a main auditorium with a seated capacity of 200, studio space with standing capacity of 100, café/bistro/bar facility with minimum capacity of 35 covers and reception area capable of accommodating small-scale exhibitions
- This is supported by the visit number and capacity analysis which suggests the centre could anticipate a minimum number of around 27,800 paid visits to the main auditorium and an additional approximate 32,500 visits to a café/bistro/bar facility. A main auditorium capacity of 200 would be required to accommodate this level of visits based on an average attendance rate of 60% and the programming of 221 performances per annum. These assumptions are considered the base level for the Arts Centre, market growth would be anticipated dependent on programming and the ability of the new facility to change existing behaviours. These assumptions allow for market growth in the form of the opportunity to accommodate increased visit numbers per performance (by an average of 40%) and also through the programming of more performances across the year
- An annual deficit in the region of approximately -£90,000 is anticipated. This is not an unexpected outcome and closely mirrors the typical experience at local arts centre of a similar type to the model proposed for North Berwick. This emphasises the following key points in relation to the sustainability of the venture:
 - Significance of programming for the centre's success – admissions to main auditorium performances is the principal source of income, within this film screenings are a particularly important income channel
 - Significance of volunteer involvement for the day-to-day running of the facility
 - Need for grant support and/or fundraising
- The Learning Academy is an important aspect of the Arts Centre delivering volunteering, skills development and training opportunities to the local community, particularly young people and will provide an important feature in the case for funding support. Given the above deficit omitting the Learning Academy programme it has been assumed that separate funding would be sought for this. Further discussions with East Lothian Council and how it could fit with existing work and skills development initiatives are recommended.

6.0 CAPITAL COSTS AND FUNDING

6.1 Capital Costs

In the absence of a design for the Arts Centre the costs can only be indicative. We have based the indicative costs on the following schedule of accommodation:

TABLE 6.1 SCHEDULE OF ACCOMMODATION	
Description of Space	Remarks
Auditorium	To seat approx. 200; flexible seating; retractable projection screen for films; sound-proofing required; in-built sound-system / digital facilities
Studio Space	To accommodate 100 people standing; equipped for dance (i.e. sprung flooring), but also suitable for a range of community purpose
Bar/ Cafe / Bistro and Kitchen	Multi-purpose space able to transition from day-time to evening purpose
Foyer/entrance hall	Entrance and meeting space for patrons of the centre. Should include box-office/ reception facilities
Toilets	For public use
Backstage area	Containing dressing rooms; toilets for artist use only; space for access between stage wings; scene dock; office space
Storage	To accommodate scenery / tables / chairs etc
Circulation	Across the building
Plant	Air conditioning, plumbing, lighting etc

The schedule is informed by the requirements ascertained during the survey and focus groups. As previously established, it is envisaged that the Arts Centre will be a new-build of 945m².

On the basis of a building of this scale, therefore, we have estimated the construction and development costs as follows. For these calculations a new-build has been assumed.

TABLE 6.2 NORTH BERWICK ARTS CENTRE INDICATIVE CAPITAL COSTS		
Cost Area	Remark	£ (excl VAT)
Construction Cost	£2,250 per m ²	£2,126,250
Infrastructure/ site preparation	Nominal lump sum (dependent on site)	£50,000
External Works: surfacing/ landscaping	Nominal lump sum (dependent on site and required parking provision)	£150,000
Fit-out	£500 per m ²	£472,500
Sub-Total		£2,798,750
Preliminaries	10%	£279,875
Contingency	10%	£307,863
Fees	20% (anticipated to cover full team)	£677,298
Inflation Allowance	5%	£203,189
TOTAL		£4,266,974

The total construction cost for the Arts Centre, including fit-out and other related capital expenses, is assumed to be approximately £4.27 million. As indicated in the table above this includes several notional figures, based on a notional area, which should be revisited and refined once a building/site has been identified. The above also omits any land acquisition cost as this is impossible to estimate until a site has been identified. Once a building or site has been identified this will be possible to quantify and there will also be opportunities to perform value engineering exercises in order to interrogate whether construction cost savings can be made.

6.2 Funding

The funding of such a development has the potential to attract National Lottery funding. This could be through Creative Scotland or the Big Lottery Fund. Creative Scotland does not have a live capital programme at present but there is every likelihood that previous capital schemes will be reopened.

TABLE 6.3 POTENTIAL FUNDING PROVISION	
Organisation	Potential Grant Available
Creative Scotland / Big Lottery Fund	£1,500,000
Trusts and Foundations	£400,000
Community Benefit Funds (Landfill and Renewable Energy)	600,000
Other Public Sector	£400,000
Total	£2,900,000
Funding Gap	£1,366,974

The figures included in the table above are based upon our knowledge of the industry and our experience of similar projects. Creative Scotland would, potentially, be a significant funder and has previously operated a capital programme. This programme is not currently live but we would

anticipate that Creative Scotland would reopen the programme at some stage over the next few years. While Creative Scotland has awarded capital grants up to and above £2 million we consider an achievable grant request based on the outcomes would be £1 - £1.5 million. Additional capital funding may be possible through the Big Lottery Fund in recognition of the significant community dimension and benefits of the project.

Securing funding, particularly capital funding, from Trusts and Foundations is extremely difficult, time consuming and fraught with uncertainty. The ability to resource an effective campaign over a number of years is crucial to the outcome and in comparison with other community projects we consider the target of £400,000 to be realistic, require 3 years of effort and a significant resource to achieve this.

We are aware that Landfill operator Viridor has previously funded projects in East Lothian and a multi-annual award could yield a significant 6 figure sum. Community projects are also increasingly being funded by community funds created by windfarm developers and operators and we would anticipate opportunities to secure capital funding from such a source.

Other public funding is highly uncertain given the changes with local authority funding and the enterprise network. We have not had the benefit of specific discussions but advice and experience from comparable projects would suggest that even if support is provided from this source it is likely to be a minority funder.

These demonstrate that, based on the assumption of achieving the maximum funding we consider to be potentially available, there still remains a significant funding gap of approximately £1.4 million. The funding gap identified in this feasibility study can be addressed by a more detailed examination of the architect's brief and the associated capital costs. This would then be followed by discussions with each of the potential funders to consider if the funding gap could be removed.

Learning Academy

The Learning Academy offers an opportunity which requires start-up and revenue funding and will appeal to different funding programmes (although potentially some of the same funders as the capital scheme) concerned with outcomes for young people, other disadvantaged communities and intergenerational learning opportunities.

6.3 Key Messages

The table below highlights the key messages relating to the capital costs and funding.

- A new build arts centre of the 'local' model outlined in the previous section would cost in the region of £4.27 million to construct
- Whilst there are capital cost funding opportunities, particularly through National Lottery funding bodies, competition will be extremely high and even if successful there will still be a considerable funding gap to fill. It is imperative that the Steering Group approach potential funders prior to submitting any applications in order to ascertain the potential for securing a greater grant than those outlined above

7.0 SOCIAL AND ECONOMIC IMPACT

7.1 Introduction

This section presents an outline social and economic assessment of the proposed North Berwick Arts Centre.

7.2 Social Impact

This section examines the social impact which the establishment of a North Berwick Arts Centre could have on the community of the North Berwick Coastal Ward. Several areas of socio-economic issue were identified in Section 4.2, Local Area Profile. These included:

- A higher percentage of people of a pensionable age within the ward
- Problems with school-leavers attaining and sustaining positive post-school destinations
- A lower number of employment opportunities for those not self-employed than in the rest of East Lothian
- Transport and access issues for those living in certain, predominantly rural, areas

To these potential issues can be added the current trend of strong population growth, which is foreseen to continue.

Such is the significance of the above issues that a number of them have been adopted as key priority areas by the North Berwick Coastal Area Partnership, part of the overarching partnership responsible for community planning in East Lothian. The partnership has identified providing increased opportunities for young people and addressing access deprivation (which is a particular issue for young people limiting their opportunities to participate in training and employment opportunities out with the ward) as their number one and two priorities.

All of the above are areas where the proposed Arts Centre could potentially have considerable impact:

Young People

The area where the Arts Centre could potentially achieve the most measurable social impact is in its potential offer to young people in the area. As noted in the survey analysis (Section 3.2.7, p.17), local residents recognise a need for activities to engage young people in the area, while the Local Market profile has demonstrated a lack of post-education employment opportunities. The Arts Centre could not only provide an engaging programme of arts classes and performances, but through the Learning Academy could also provide the opportunity to gain valuable pre-employment skills through volunteering, more structured internships or skills development sessions. Running the café/bistro/bar facility as a social-enterprise type franchise would be a key element of this.

Though the Centre may not necessarily offer long-term employment opportunities to school-leavers, it offers real potential to enhance the employability of local young people through the development of skills and experience, and consequently assist them in pursuing employment opportunities in other areas. This, as noted during the stakeholder focus group, represents an element of the Centre to which the organisations which make up the Steering Group are extremely committed, and which they desire to prioritise.

An Older Population

A population with a higher pensionable age presents several problems, including the increased isolation and loneliness of more elderly residents, and the desire amongst those who are healthy and active to remain positively engaged with their community. An Arts Centre, particularly if served by strong transport links, could contribute to the alleviation of both these issues by providing a community focal point delivering programmes to interest and engage more isolated people, and those who simply wish to maintain or develop their interest in the arts. It also offers a welcoming, comfortable meeting place for the local community and the opportunity to become involved as a volunteer or engage in classes to those who are more active.

Intergenerational Opportunities

Through the Learning Academy the Arts Centre would also promote opportunities for intergenerational work bringing young people and the older population together for mutual and wider benefit. Opportunities would include skilled (predominantly retired) members of the local community sharing their skills and experience with young people as a key delivery mechanism within the programme Learning Academy programme. This could include retired local artists, actors, dancers, business people etc. amongst whom there is a strong contingent in North Berwick. The Beth Johnson Foundation sums up the function and benefit of intergenerational opportunities:

“Intergenerational practice aims to bring people together in purposeful, mutually beneficial activities which promote greater understanding and respect between generations and contributes to building more cohesive communities. Intergenerational practice is inclusive, building on the positive resources that the younger and older have to offer each other and those around them.”

Access Deprivation

The issue of transport and access which face some residents of the more rural areas and young people who cannot afford to travel to engage in employment or training opportunities is also something which the Centre could assist with. A vibrant facility within an easily commutable distance where people can participate in the arts, simply meet up for refreshments or participate in more formal learning or training opportunities will provide the opportunity for greater social inclusion for a wide cross section of the community, encouraging a greater sense of community cohesion as a result.

Employment Opportunities

A core team of staff will be required for the successful management of the Centre, and it is feasible that some of these positions should be drawn from local community members, particularly for roles focusing on community engagement.

The issues discussed above are only likely to increase in response to the current and projected population growth in the North Berwick Coastal Ward. This will not only potentially exacerbate current local issues, but is also likely to create new ones, not least a challenge to maintaining a strong sense of community. A facility such as the Arts Centre, with its potential to address some of the local issues and its clear and unambiguous focus on the benefits its stakeholders wish to bring to the area, could therefore have a strong social impact.

7.3 Economic Impact

An economic impact assessment was performed in relation to the main visitor activities associated with the Arts Centre, namely attendance at paid-for performances and café/bar/bistro visits. The economic impact assessment identifies the impact generated on the tourism economy in a typical year at the local East Lothian level assuming achievement of the mid scenario visit numbers identified and analysed in Section 5. The assumptions underpinning the impact assessment are based on a combination of industry estimates, the surveys which were conducted as part of this study, and our own understanding gained through considerable experience working with arts facilities within a variety of contexts. The assumptions and the supporting evidence are explained in full in Appendix D (from p.109).

TABLE 7.1 NORTH BERWICK ARTS CENTRE ECONOMIC IMPACT SUMMARY	
	Local East Lothian Level
Net Additional Expenditure	£480,000
Employment Impact	9.5

The visitor impact of the North Berwick Arts Centre on the East Lothian economy is anticipated to be **approximately £480,000 net additional expenditure**. This equates to an employment impact on the local economy of approximately **9.5 Full Time Equivalent** employment positions.

7.4 Key Messages

The box below presents the key messages highlighted through the social and economic impact assessment.

- The proposed North Berwick Arts Centre has real potential to impact meaningful social benefit on sections of the local community facing issues concerning training and employability (for young people in particular), an aging population and access deprivation. The Arts Centre has real potential to improve life chances for members of the local community of all ages, through learning, personal development and active citizenship. The Arts Centre could help build a stronger, more resilient, supportive, influential and inclusive community. The Learning Academy is a key element in the delivery of such social benefits.
- The visitor impact of the North Berwick Arts Centre on the East Lothian economy is anticipated to be approximately £480,000 net additional expenditure. This equates to an employment impact on the local economy of approximately 9.5 Full Time Equivalent employment positions.

8.0 CONCLUSIONS AND RECOMMENDATIONS

8.1 Conclusions

The feasibility study confirms a demand and market opportunity for the creation of an Arts Centre in North Berwick. The consultation results and market appraisal highlight that North Berwick has a sizeable, vibrant arts community yet a lack of accessible, available performance venues considered fit-for-purpose by performers and potential audiences. Residents in the local market within the immediate vicinity (approximate 15 minute drive time) are considered to be the primary attendees and users. The creation of a new Arts Centre would also enhance the appeal of a visit to North Berwick amongst the wider local market, day trip market and tourist market providing them with an enhanced choice in recreational activity once they are there, particularly with the inclusion of a café/bistro. Visit number and capacity analysis informed by the market appraisal and comparator analysis recommends that a North Berwick Arts Centre adopts the 'Local' model which includes the core features of a main auditorium with seated capacity of 200, studio space with seated capacity of 100, café/bistro/bar facility with minimum capacity of 35 covers. This would meet current demand and allow for future growth of the market. The programme for the Arts Centre should include a varied programme of film, theatre, music, dance and comedy with film showings being the most numerous.

The creation of an Arts Centre in North Berwick has potential to yield real positive social and economic impact on the local area. The North Berwick Coastal Ward currently faces demographic, employment and access issues causing a population comprised of a comparatively high proportion of older people, issues surrounding youth training and employment opportunities and issues surrounding isolation and lack of community cohesiveness. With the population set to grow this has the potential to exacerbate current issues and the likelihood of creating new ones. The creation of an Arts Centre would not only provide enhanced access to the arts, itself well-known to generate social benefits, but through the Learning Academy also provide the opportunity for members of the community to gain valuable pre-employment skills through volunteering, more structured internships or skills development sessions. With opportunities for intergenerational work as a key element of this, the Learning Academy would be a key contributor to enhancing community cohesiveness bringing young and older people together for mutual and wider benefit.

Whilst displacement would factor, the creation of a North Berwick Arts Centre would enhance access to the arts providing the opportunity for increased visits amongst the currently 'arts engaged' audiences and new opportunities amongst those for whom the need to travel to attend a dedicated arts venue is a key barrier to participation. It would therefore stimulate increased direct and indirect economic activity for the area whilst also providing new employment opportunities.

However, the feasibility study also demonstrates the scale of the financial challenge in terms of matching income and expenditure. As with many local arts centres the operating expenditure exceeds the income. Even allowing for imaginative staffing and the use of volunteers, the economics of operating an arts centre are challenging. The feasibility study quantifies the scale of the gap between the earned income and the expenditure. This gap would have to be addressed on a recurring basis.

The capital investment required for the development and construction of the Arts Centre is estimated provisionally at £4.27 million. This could be funded by public sector bodies, notably Creative Scotland or the Big Lottery Fund, supplemented by smaller capital grants from other trusts and foundations. It is considered that at best, approximately £2.9 million could be achieved from these sources. This reveals a potential capital funding shortfall of at least £1.36 million (although once a preferred building/site has been identified there is potential that through value engineering exercises the final capital cost could be lower). This could be challenging to locate from other sources, particularly in the current competitive funding climate, and would require a clear, well thought-out fundraising strategy alongside personnel with strong skills in this area.

8.2 Recommendations

The key issues which emerge from this first phase of the feasibility study concern funding the capital cost of the project and addressing an anticipated annual deficit. As outlined above, neither of these are unexpected outcomes for an arts centre. It is recommended that the Steering Group proceed to the second stage of the feasibility study and explore the various potential locations for an Arts Centre of the type outlined in the report. As a result of this specifications can be drawn and the capital costs can be revisited and refined. Should a feasible option emerge the next step is to consider the fundraising strategy for the project exploring the optimum funding package which is likely to be secured. It will be important to approach funders directly to discuss this. Simultaneous to this a business plan should be completed to test the phase 1 feasibility assumptions based on more detailed understanding of key variables such as programme and location and explore alternative scenarios through sensitivity testing. This will enable clearer understanding of the specific challenges and risks to be addressed going forward.

The current North Berwick Arts Centre Steering Group includes a range of expertise and experience relevant to the development, implementation and operation of the proposed project. There is no need to formalise this at this stage as further development and initial funding applications can be made in the name of the Steering Group. It would however be prudent to consider the appropriate vehicle for developing and operating the centre. An organisational structure with charitable status would be beneficial in terms of securing grants and maximising a variety of potential donations through the application of Gift Aid. The organisation could take a variety of forms with the Company Limited by Guarantee with Charitable Status being a well established model. There is also a new legal structure in the form of a Scottish Charitable

Incorporated Organisation which has been created for the charity sector in Scotland. The selection between the options would require legal advice.

Looking ahead to the future operations the organisation would want to consider establishing a trading subsidiary to reduce the charity's exposure to market and financial risk. This is a common approach and avoids the charity and the charity's assets being placed at risk should any of the trading activities encounter severe financial difficulties.

Outlined below is an Action Plan for the Steering Group mapping out the short term, medium term and long term actions which will be required in order to advance the project forward as a feasible, sustainable proposition attractive to funders and the likely timescale for the project should it advance each threshold.

TABLE 8.1
NORTH BERWICK ARTS CENTRE ACTION PLAN

Short-Term	Medium Term	Long Term
2014, 2015	2016, 2017	2018, 2019
<ul style="list-style-type: none"> • Design Development to establish the building footprint and site requirements • Identify a feasible site that responds to the feasibility study and initial design • Capital Project Fundraising Strategy Framework - consider how the funding gap could be met and how achievable this is. Discuss with potential funders. • Explore the potential to secure funding for Learning Academy • Establish budget (through fundraising/ from funders) for project development if seeking support from external consultants / professionals • Complete a business plan that tests underlying assumptions and explores alternative scenarios through sensitivity testing • Explore which bodies or organisations could provide revenue grant funding • Further community consultation • Initiate a Project Gateway Review based on revenue funding potential and determine whether to proceed 	<ul style="list-style-type: none"> • Complete Capital Project Fundraising Strategy • Complete application to potential capital project funders, with external consultant support • Consider how the Arts Centre could be governed and the cost/benefits of Trust/Charity status, the types of expertise that would be required and where this could be found • Create a governing body for the Arts Centre • Explore planning permission and other requirements • Building/site acquisition • Further community consultation • Capital project funding decisions made • Performance programme framework created 	<ul style="list-style-type: none"> • Construction works on-site • Staff and volunteer recruitment & training • Performance programme established • Marketing campaign launched • Arts Centre operational

APPENDIX A

COMPARATOR PROFILES

A.1 Initial Comparators

The following comparators were visited by the NBACSG prior to the commissioning of Jura Consultants during the initial consultation stage.

The Maltings Theatre and Cinema	
Location:	Berwick Upon Tweed
Visitor Experience:	The Maltings offers a full programme of nearly 700 events each year – mixing world-class professional performance and film with community-centred activities, workshops and amateur events. Venue hire/conferencing also available.
Facilities:	<p>Theatre: 311-seat Main House theatre with a proscenium arch stage, circle and boxes, and superb sight lines.</p> <p>Studio: state-of-the-art black box studio theatre, completed in March 2011, which seats 74 on retractable seating and which is programmed with live performance and film throughout the year, as well as hosting a wide range of workshops and classes which attract in the region of 9,000 attendances annually.</p> <p>Stage Door Bar: open Wednesday-Saturday from 6pm until late (Open Sunday, Monday & Tuesday if there is a performance). The Stage Door bar is an eccentric and bohemian public bar that serves a wide range of hot and cold drinks, as well as being able to host live entertainment.</p> <p>The Maltings Kitchen: a fully licensed restaurant and café which serves cakes, coffees and lunches Monday–Saturday through the day, and superb pre-theatre suppers from 6pm onwards on Thursdays, Fridays and Saturdays.</p> <p>The Maltings also houses the offices of community arts education social enterprise Berwick Film and Media Arts Festival.</p>
Programme of events:	Theatre; Film; Comedy; Dance (incl. tango workshop); Music; Community (vintage market, summer arts workshop); Spoken Word (e.g. talk by John Bird); Visual Arts (incl. craft workshops)
Admission:	<p>Cinema: adult admission £7.50 (live theatre broadcast £16)</p> <p>Theatre/ music performance: typically ranges between £10-18</p> <p>Activity classes: e.g. adult drawing and painting £15 per adult per day; children's photography £4</p>
Staff and Volunteering:	In addition to its paid staff (almost all part-time), the Maltings utilises around 30-40 volunteers, primarily as stewards for films. They also offer two- week work experience placements for local schools and three-month internships in marketing, technical, programming etc.
Funding:	<p>From sponsors and funders:</p> <ul style="list-style-type: none"> • Northumberland County Council, our local authority funder • Arts Council England North East, our state arts funder • Vision Express, our newest Corporate Patron • Greaves, West & Ayre, our longstanding Corporate Patron <p>Northern Angel Fund for Berwick at the Community Foundation Tyne & Wear</p>

The Maltings Theatre and Cinema	
	<p>and Northumberland</p> <ul style="list-style-type: none"> • Awards For All part of the National Lottery Fund <p>The following organisations supported the development of the Henry Travers Studio in 2011:</p> <ul style="list-style-type: none"> • The Leader Coast and Lowlands Fund • DEFRA • The European Agricultural Fund for Rural Areas • The Northumberland Area of Outstanding Natural Beauty

The Regal	
Location:	Bathgate
Visitor Experience:	Community theatre offering an exciting programme of film, music, theatre, comedy and children's events. A unique venue for performances, celebrations, conferences or events. Spaces for classes and workshops
Facilities:	<p>Theatre: dedicated theatre space, accommodating an audience of 206 people in tiered seating. The tiered seating can be folded away revealing an attractive wooden floor to cater for a cabaret performance, party or business function</p> <p>Cinema: permanent, retractable cinema screen, over 20 feet in width</p> <p>Bar: open by arrangement to suit functions and performances.</p> <p>Rooms for hire: Five attractive spaces available to hire for parties, functions, meetings, rehearsals and workshops</p>
Programme of events:	Classes and workshops (<i>some aimed specifically at children</i>); films; shows and concerts;
Admission:	<p>Cinema: £4 (releases typically later than nationwide release)</p> <p>Film/theatre: up to £20</p>
Staff and Volunteering	Offer various opportunities to volunteer
Funding:	Not stated

The Eastgate	
Location:	Peebles
Visitor Experience:	<p>Eastgate Theatre and Arts Centre in the heart of Peebles in the Scottish Borders is a vibrant, busy, well-loved hub for live performances, films, classes and exhibitions. A key venue for established acts and emerging talent, the theatre's year round performance programme ranges across music, drama, dance, comedy, talks and family shows.</p> <p>Weekly classes give opportunities for people of all ages to take part in art, dance, drama and music. There are also "one off" workshops and festivals as well as an outreach</p>

The Eastgate	
	<p>programme taking arts into the community.</p> <p>The Eastgate's easily accessible, family friendly café is a popular meeting place where locals and visitors enjoy a selection of drinks and snacks, as well as a very warm welcome.</p>
Facilities:	<p>Auditorium - Eastgate's main performance venue, which can be set up theatre style with around 230 seats, or with the raked seating retracted to provide either a cabaret style setting with tables and chairs or a clear space for dancing. Hosts drama, theatre, comedy and film performances.</p> <p>Studio - an adaptable space which is used regularly for classes, workshops and rehearsals, and often displays exhibitions by artists from the Scottish Borders and further afield.</p> <p>Café/ bar - during the summer months the café can be extended onto an external paved area for al fresco refreshments, weather permitting.</p> <p>Car parking – large, free car-park near to front door</p>
Programme of events:	Music; film; drama; talks; dance; comedy; weekly classes for all ages; workshops/ courses; also outreach programme with the local community and schools.
Admission:	<p>Film: Adult admission £7 (typically weekend showings)</p> <p>Music/theatre/drama performances: approximately £5-15</p>
Staff and volunteering:	Volunteer opportunities in the café and bar, the box office, and as ushers in the auditorium.
Funding:	Scottish Arts Council Capital Committee, the ERDF, Scottish Borders Enterprise, Scottish Borders Council and funds raised by local people and organisations

Beacon Arts Centre	
Location:	Greenock
Visitor Experience:	Opening in January 2013, the Beacon is a significant new addition to the Scottish theatre and arts scene and is a venue of choice for touring productions as well as being a vibrant hub for the local community theatre groups within the area
Facilities:	<p>Main stage - one of the largest in Scotland with capacity for up to 500 over 3 levels. Fully equipped including a full height fly tower with counterweight system, two trap doors, retractable orchestra pit and generous wing space.</p> <p>Studio – seating for up to 130 people on retractable bleacher seating and is adaptable as a black box space, which can be used end stage, in the round, cabaret etc.</p> <p>Rehearsal rooms – which can be extended to provide a function suite for up to 170 guests</p> <p>Bistro – offering casual dining including morning coffee, afternoon teas, handcrafted pastries, light lunches, all day dining and pre-theatre supper menus. Catering for Weddings, Birthdays, Anniversaries, Conferences and a variety of other events is also available in the form of specially selected or those tailored to suit individual needs.</p>

Beacon Arts Centre	
Programme of events:	Film and drama ; music; exhibitions; comedy; youth dance and theatre classes; children's' and adult art classes including touring and local performances
Admission:	Performances: £5-20
Staff and Volunteering	No details given
Funding:	Big Lottery Fund, Inverclyde Council

A.2 Additional Comparators

The remainder of the comparators in this section were not included in the initial consideration, but nonetheless present a number of similarities with the vision of the NBACSG.

The CatStrand, Castle Douglas	
Location:	Dumfries and Galloway
Visitor Experience:	Scotland's newest and most exciting contemporary performance and meeting space in the heart of the Glenkens community promoting a varied music, arts and exhibition programme
Facilities:	<p>CatStrand Cinema</p> <p>Flexible space for music performances, classes, training meeting space, exhibitions, conferences</p> <p>Cafe</p> <p>A central focal point for the whole of Dumfries and Galloway, the CatStrand welcomes individuals, groups and businesses wanting to hire fully equipped meeting rooms. The CatStrand aims to offer a range of high quality events, activities and facilities, with full disabled access, to suit every taste and every visitor - all under one roof.</p>
Programme of events:	Film, music, theatre, exhibitions, workshops and classes. Includes youth performance programme.
Admission	Performances: free to approximately £10 per adult
Staff and Volunteering:	Opportunities for general volunteers; also a range of longer term possibilities for voluntary internships and placements for those keen to gain work experience in the arts, develop certain skills, or to help provide a first step back into employment.
Funding:	HLF, Council, Creative Scotland, Independent Trusts, Donations

The Three Villages Hall, Arrochar	
Location:	Argyll and Bute
Visitor Experience:	<p>The Hall acts as a vibrant local hub for the three villages and also the wider community. A place for groups to meet: karate, photography, scouts, lunch clubs, indoor bowls and table tennis, cinema club showings. The Hall provides an active programme of events all year round, from concerts and theatrical performances, to book clubs and art classes.</p> <p>The Three Villages Hall typically acts as a venue for local community classes and</p>

The Three Villages Hall, Arrochar	
	activities rather than a venue for touring performances.
Facilities:	<p>Hall – venue for classes, activities and meetings. Total capacity of 120. Cinema showings (seating limited to 50). Also available for family gatherings: wedding receptions, christening parties, birthday and anniversary celebrations</p> <p>Meeting room – x 2 with capacity of 20 – 25 in each</p> <p>Interview room – capacity for approximately 6</p> <p>Classroom / backstage space</p> <p>Fully equipped gym - offer additional facilities for locals and visitors alike.</p> <p>Café – Pitstop café offering hot and cold meals and snacks</p>
Programme of events:	Music, theatre, film, ceilidhs, clubs, classes, meeting and conferences. Strong focus on local community classes and activities.
Staff and Volunteering:	Managed by the campus management committee. Volunteers operate the hall day to day
Funding:	No details available

Brewery Arts Centre, Kendal	
Location:	Lake District
Visitor Experience:	The Brewery has evolved to become one of the most important education centres for the arts in the North West with an extensive programme of arts based learning for all ages, abilities and interests.
Facilities:	<p>Theatre - with raked auditorium offering seating for 260. Also suitable for talks, lectures, conferences, shows and film. Also used as a third screen for the cinema for half the year.</p> <p>Malt Room – flexible venue which can accommodate 300 without catering, 175 with. Offers dancefloor, platform stage and private bar facility.</p> <p>Cinema – 2 permanent cinema screens offering most titles on their release dates. 3D screenings available. Daily screenings at various times throughout the day. Approximately 6 different films shown per week. Also offers screenings of theatrical performance.</p> <p>Garden – a venue for regular free music performances</p> <p>Vats Bar & Grainstore – bar and restaurant specialising in cask ales and serving pizzas and tapas</p> <p>Warehouse Café – marketed as a meeting place for artists, audiences and members of the community. Free Wi-Fi with every purchase. Also offers specialised film showings every Tuesday and Thursday</p> <p>All available for hire.</p>
Programme of events:	Cinema, Music, Comedy, Theatre, Dance, Youth, Art, Lit, Festivals, Adult Education. Strong youth arts programme encompassing dance, music and theatre. Activities include holiday workshops, regular term-time classes, schools and community outreach, projects and special events.

Brewery Arts Centre, Kendal	
Admission:	<p>Cinema: adult admission - £7.50</p> <p>Theatre: adult admission typically £10-15</p> <p>Music performances – vary from free up to approximately £20.00</p> <p>Youth Arts: dance classes - £48-54 per term;</p>
Staff and Volunteering:	Operate via staff and volunteers
Funding:	Registered charity, generates 90% of its own income, also corporate sponsors, Brewery “Friends”, Trusts and Foundations, other supporters

The Rosehill Theatre, Whitehaven	
Location:	Cumbria
Visitor Experience:	Rosehill Theatre, on the hills above Whitehaven, opened in 1959 and is one of the UK's most intimate theatres offering a diverse range of arts and entertainment from music, theatre, film, talks, comedy, shows for young people and more.
Facilities:	<p>Theatre with seating capacity of 208 (120 in stalls, 88 in circle)</p> <p>Barn with 2 meeting and function rooms. Upper floor is sprung and has seating capacity for 80. Lower floor has seating capacity for 40. Also offers access to double height workshop area.</p> <p>Adjacent to barn is courtyard space suitable for marquee</p> <p>Free car and coach parking, a licensed bar and serves food (by arrangement)</p>
Programme of events:	Theatre, Comedy, Music, Film, Activities and Workshops, particularly for children.
Admission:	<p>Cinema: film and curry night for £15</p> <p>Theatre: Adult admission typically £6-8</p> <p>Music performance: Adult admission typically ranges from £10-18 depending on performer</p>
Staff and Volunteering:	The theatre has a small number of permanent staff and is supported by over 30 volunteers.
Funding:	<p>A recent grant of £48,000 from the Copeland Community Fund and additional funding from Arts Council England has facilitated Rosehill to employ professional support to develop funding applications for a £4.5 million redevelopment of the theatre.</p> <p>The capital project has since secured additional funding of £4.1m from Arts Council England's Capital programme, Copeland Community Fund and Britain's Energy Coast <i>in partnership</i> with Nuclear Management Partners. The remainder of funding will be secured via the Reimagine Rosehill campaign.</p> <p>Community Participation</p> <p>Funding from the Copeland Community Fund and the Hadfield Trust made it possible for Rosehill to find new ways of engaging with young people and others from our local communities, through the Let Them Eat Jam project produced in partnership between</p>

The Rosehill Theatre, Whitehaven

Rosehill and the Coney project - work with local communities in Mirehouse and Cleator Moor unearthed stories from their past and present to create an exciting production using locally based and professional actors. Using local characters, anecdotes and memories the production was a great success and reached a wider Rosehill audience.

Schools Engagement

Grants from the Heritage Lottery Fund and Cumbria Community Foundation enabled the theatre to host a unique exhibition of costume designs by Rosehills' famous interior designer Oliver Messel. As part of the month long exhibition which was produced in partnership by Rosehill, The Beacon and V&A museum successes included:

- 7,000 people attending the exhibition
- 150 local school children participating in learning opportunities inspired by the exhibition
- 11 local 6th form students were engaged in the scheme to design, produce costumes and accompanying DVD.

A.3 Brunton Theatre (Comparator and Competitor Analysis)

Brunton Theatre, Musselburgh	
Location:	Musselburgh, East Lothian
About:	<p>Artistic programming managed by Brunton Theatre Trust (established in 1994 and a registered Scottish Charity). Venue hire is managed by the Arts Service, East Lothian Council.</p> <p>Since the completion of a major refurbishment in 2012 (investment by East Lothian Council), the Theatre Trust have been able to expand their programming of high quality artistic events. This commenced with a performance of La Traviata by Scottish Opera.</p>
Facilities:	<p>Theatre</p> <ul style="list-style-type: none"> - Steeply raked seating with flat stage and clear sight lines - Capacity of 366 <p>Venue 1</p> <ul style="list-style-type: none"> - Second venue with capacity of 496 - State of the art sound and lighting system; digital projection; cinema screen; staging; fully retractable seating; breakout rooms; changing rooms - Used for performances, film screenings and also used for private and corporate hire (including weddings) <p>Venue 2</p> <ul style="list-style-type: none"> - 250 theatre style seating - Sound and light; staging; break-out rooms; private bar access <p>Bar and Bistro</p> <ul style="list-style-type: none"> - Open before and after shows, interval drinks can be ordered on arrival - Serves snacks, lunches, pre-theatre suppers (special 2/3 course pre-theatre packages are available for selected performance evenings) - Open daily (9am-5pm) and all evenings when there is a performance (to 7.30pm) - 3 year lease agreement with Bistro at the Brunton Theatre
Programme of events:	<p>Offers quality music, theatre, dance, comedy, children's shows and films year round. Includes touring performances, tribute acts, classical music, talks and lunchtime performances. Film showings include new releases and National Theatre Live performances. During 2012/13 the Theatre hosted 198 performances:</p> <ul style="list-style-type: none"> - Panto 63; drama 31; dance 12; music 46; children's theatre 27; comedy 7; film screenings 12 <p>Youth Theatre programme – meets weekly and engages in creative workshops with specialists and 2 productions. 118 members in 2012/13.</p> <p>Education and outreach activities for all sections of the community. The programme links to local schools through projects and workshops. During 2012/13 there were 6 programmes for nursery, primary and secondary attended by 1,200 pupils.</p> <p>Partnership with Queen Margaret University where theatre students work alongside the Youth Theatre and other local theatre and music groups to develop a community play.</p>
Visits	Total attendance 2012/13: 38,995 (2011/12: 35,718). This equates to 70% of the theatre's capacity.
Admission:	<p>Film: £7 (National Theatre Live: £13)</p> <p>Drama: Typically £13.75-£16 (children's theatre: £6.50)</p> <p>Music: Typically £14-£16 (but up to £35)</p> <p>Comedy: £14.50</p>
Staff and Volunteering:	<p>No direct employees. East Lothian Council are contracted to provide the appropriate staff and management services to the charity.</p> <ul style="list-style-type: none"> - Management & Admin Staff x 6 - Theatre staff x 5.5
Funding:	Contract payment from East Lothian Council

APPENDIX B
FULL SURVEY RESULTS

Surveys

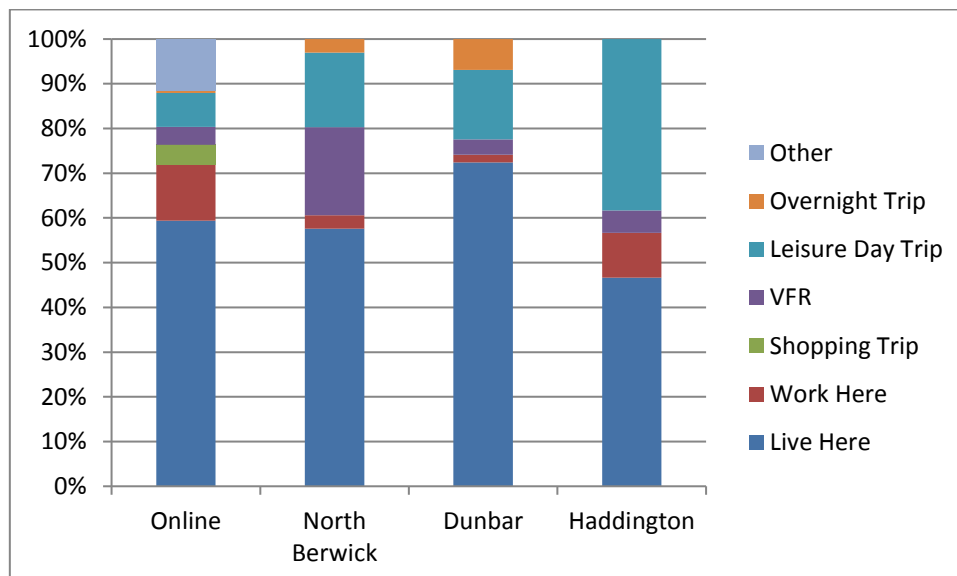
	No. of Respondents	%
Online	224	52
North Berwick On-street	70	16
Dunbar On-street	67	16
Haddington On-street	69	16
Total	430	100

1. When was your last visit to North Berwick? (Please select one answer)

Online survey only:

	Frequency	Percent
Within the last day	176	79%
Within the last week	20	9%
Within the last month	12	5%
Within the last 3 months	9	4%
Within the last 6 months	2	1%
Within the last year	3	1%
Within the last year	2	1%
Total	224	100%

2. What was your main reason for visiting North Berwick / Dunbar / Haddington? (Please select one answer)



Online Survey:

Online survey	Frequency	Percent
Live Here	133	59%
Work Here	28	13%
Other	26	12%
Leisure day trip from home	17	8%
Shopping Trip	10	4%
Visiting Friends / Relatives	9	4%
Overnight trip from home	1	0%
Total	224	100%

North Berwick On-street:

NB - on-street	Frequency	Percent
Live Here	38	58%
Visiting Friends / Relatives	13	20%
Leisure day trip from home	11	17%
Work Here	2	3%
Overnight trip from home	2	3%
Shopping Trip	0	0%
Other	0	0%
Total	66	100%

Dunbar On-street:

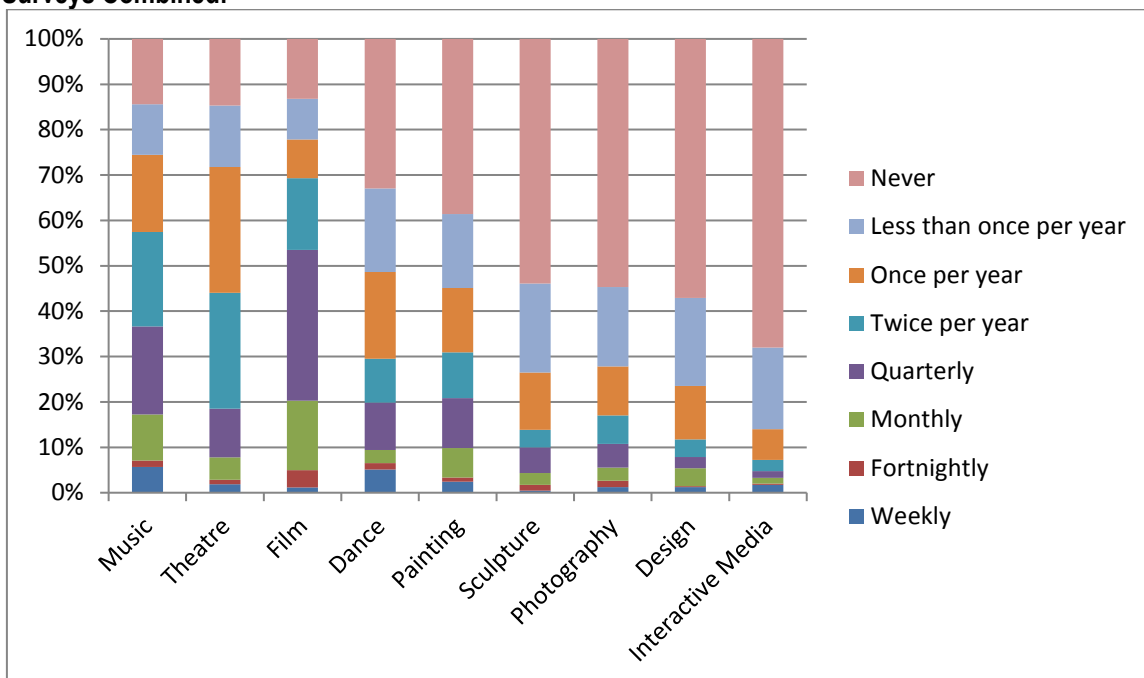
Dunbar - on-street survey	Frequency	Percent
Live Here	42	72%
Leisure day trip from home	9	16%
Overnight trip from home	4	7%
Visiting Friends / Relatives	2	3%
Work Here	1	2%
Shopping Trip	0	0%
Other	0	0%
Total	58	100%

Haddington On-street:

Haddington - on-street survey	Frequency	Percent
Live Here	28	47%
Leisure day trip from home	23	38%
Work Here	6	10%
Visiting Friends / Relatives	3	5%
Shopping Trip	0	0%
Overnight trip from home	0	0%
Other	0	0%
Total	60	100%

3. Please indicate how frequently you attend the following arts performances / activities / exhibitions. (Please tick one box per performance / activity / exhibition type)

All Surveys Combined:



	Weekly	Fortnightly	Monthly	Quarterly	Twice per year	Once per year	Less than once per year	Never	Total
Music	24	6	43	82	88	72	47	61	423
Theatre	8	4	21	45	108	117	57	62	422
Film	5	16	65	141	67	36	38	56	424
Dance	21	6	12	43	40	79	76	136	413
Painting	10	4	27	46	42	59	68	161	417
Sculpture	2	5	11	23	16	52	81	222	412
Photography	5	6	12	22	26	45	73	228	417
Design	5	1	16	10	16	48	79	233	408
Interactive Media	7	1	5	6	10	27	72	272	400

Other:

Also see a lot of theatre, dance, music and arts during the Edinburgh Fringe - maybe about 15 performances.

Art exhibitions in NB

Binge on lots of stuff during Festival and Fringe by Sea not included in above estimates

exhibitions-local history/heritage

Museums - monthly

Stained glass class

Whatever is on in the town

Yoga weekly

4. Who would you normally attend arts performances / activities / exhibitions with? (Please select one answer)

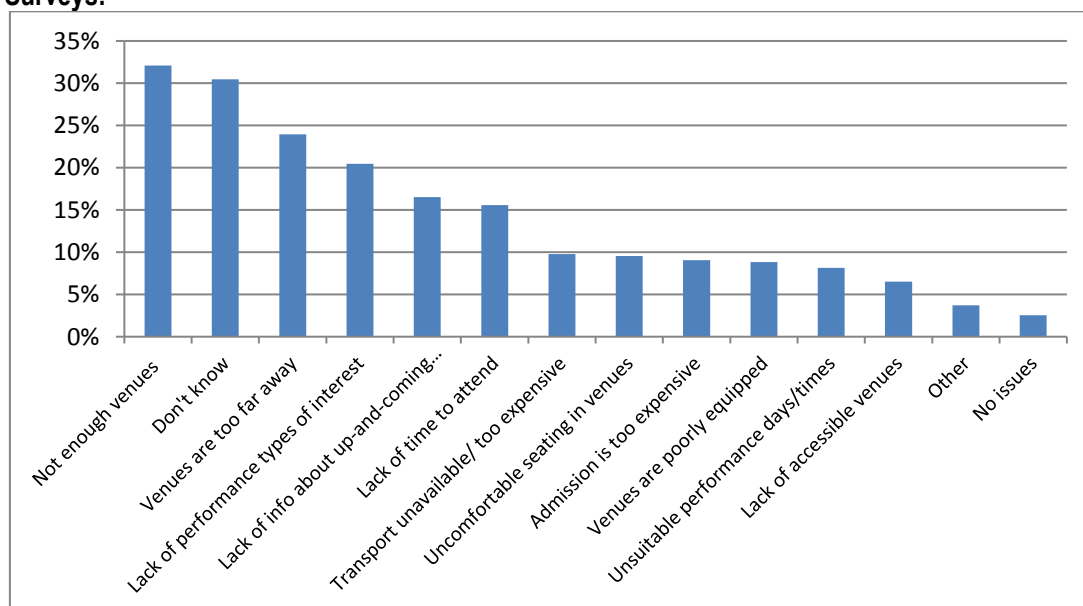
All Surveys:

	Frequency	Percent
Alone	11	3%
With another adult	214	50%
In a family group with children	106	25%
In a family group with adults	18	4%
In a group of children	12	3%
In a group of adults	22	5%
I don't attend any arts performances	38	9%
Other	9	2%
Total	430	100%

Other
A group of friends.
adults and family as appropriate
alone or with another adult
group of friends
it varies
One answer doesn't fit - with an adult AND in family group with children, c50:50
Probably equal amounts of answers 2-4.
With a group of friends or alone.
With my family

5. What are the main issues with the existing arts provision in East Lothian? (Please select all that apply)

All Surveys:

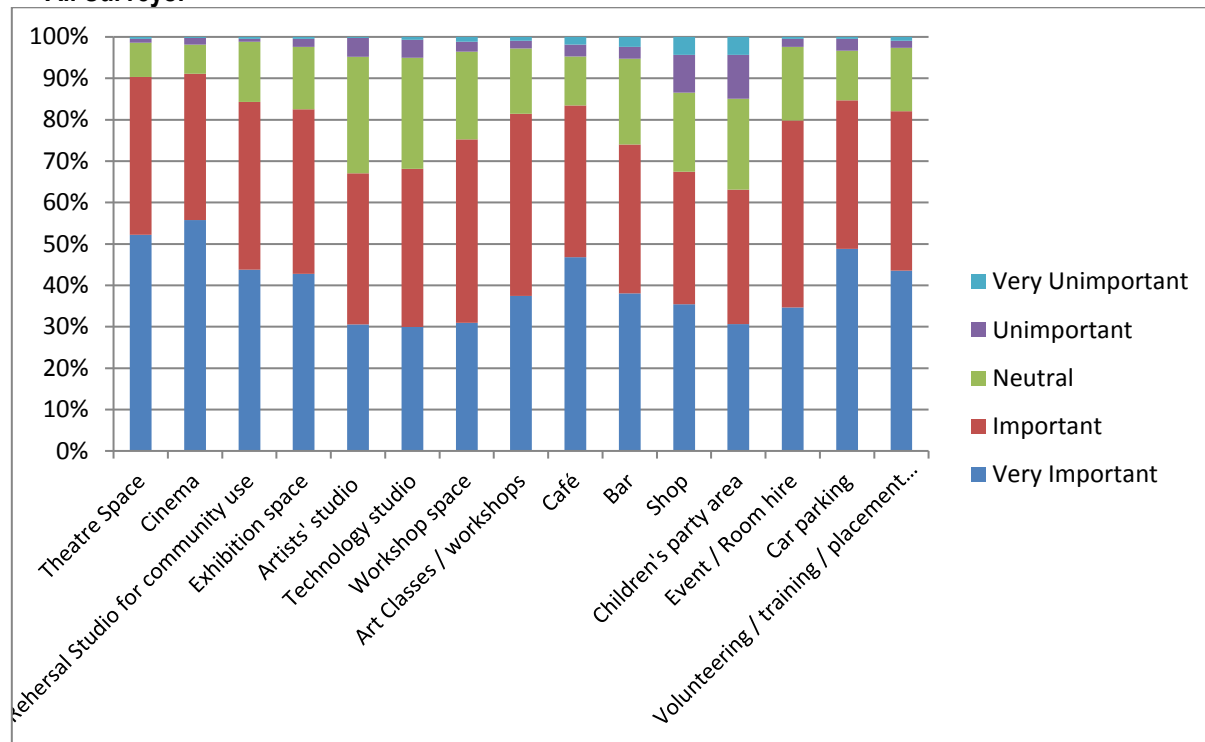


	Frequency	Percent
Not enough venues	138	32%
Don't know	131	30%
Venues are too far away	103	24%
Lack of performance types of interest	88	20%
Lack of info about up-and-coming performances	71	17%
Lack of time to attend	67	16%
Transport unavailable/ too expensive	42	10%
Uncomfortable seating in venues	41	10%
Admission is too expensive	39	9%
Venues are poorly equipped	38	9%
Unsuitable performance days/times	35	8%
Lack of accessible venues	28	7%
Other	16	4%
No issues	11	3%
Total	430	100%

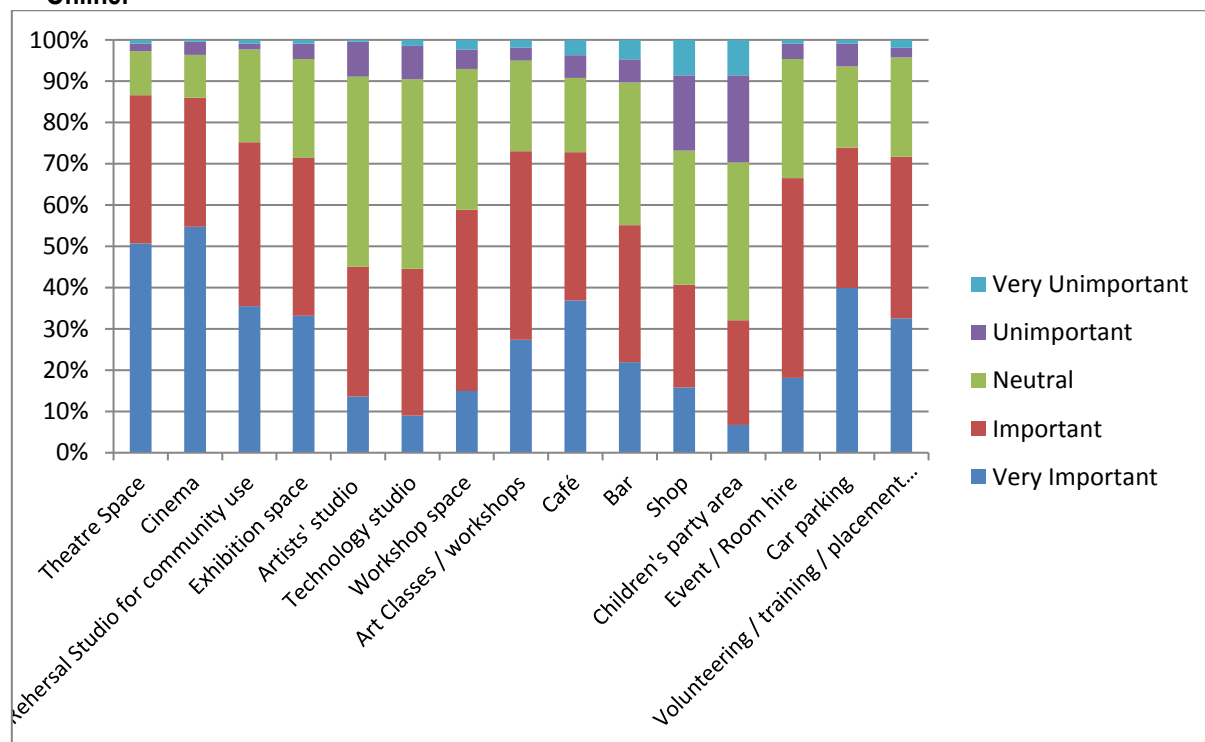
Other
Don't live in area
Don't really know
Don't really like that kind of thing
expensive
Films are too infrequent and seats are too uncomfortable, art galleries are all sales galleries and focus in the tourist market
I often travel to Edinburgh or Glasgow for dance, arts and music performances.
Lack of suitable performance space in the East of the county
Live in other part of UK
lots of potential venues which do not have the right equipment
No near
Not int.
Not Interested
Not interested in art
Not publicised well enough
Not really able to go too far these days
Not that interested
not very interesting
poor view of screen/stage (seating not stepped)
Population too small to support - combine with library/museum?
Prefer to go into Edinburgh to the Theatre because there are a choice of eating places prior to going to theatre
Quality
There are good venues in e.g. schools, church halls in most areas. A good theatre in Musselburgh
They are old and not purpose built, so a bit unsuitable for a lot of things
times are awkward
Too Old

6. A previous community consultation exercise highlighted a number of desirable features of a new Arts Centre. In your opinion how important is it that the new Arts Centre encompasses the following? (Please select one response for each element).

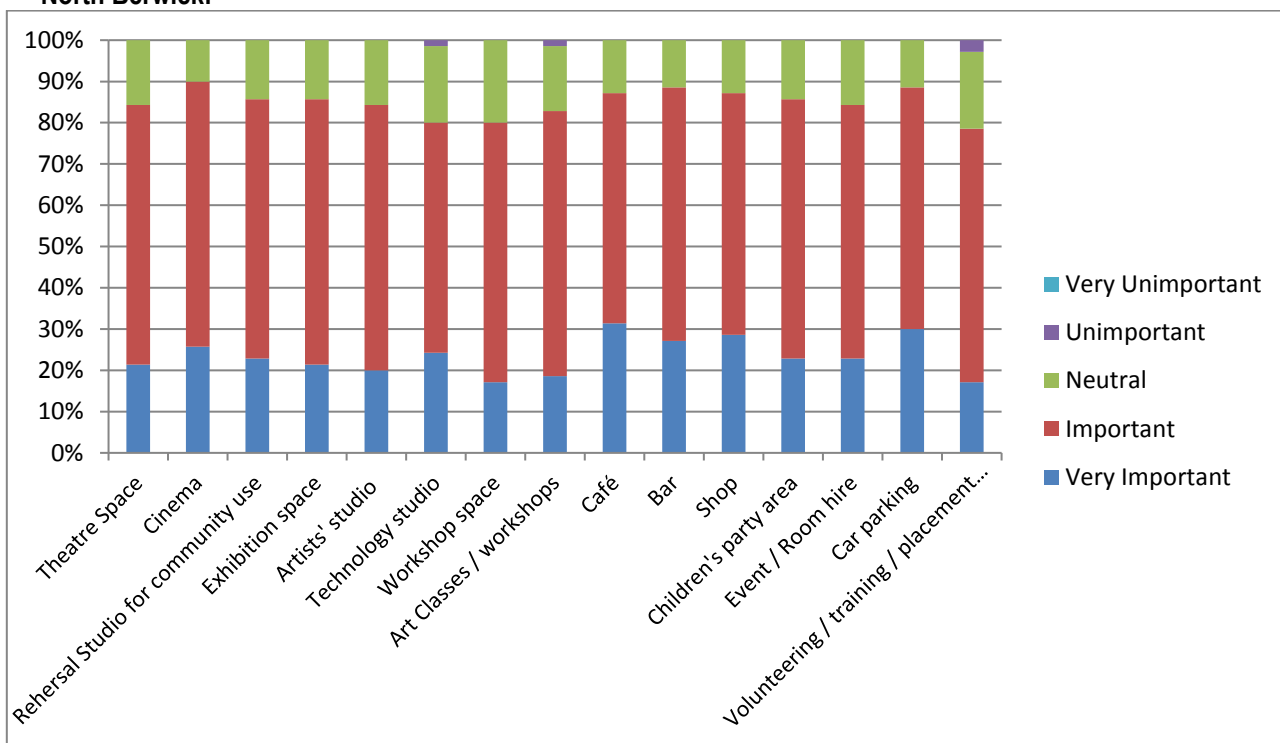
All Surveys:



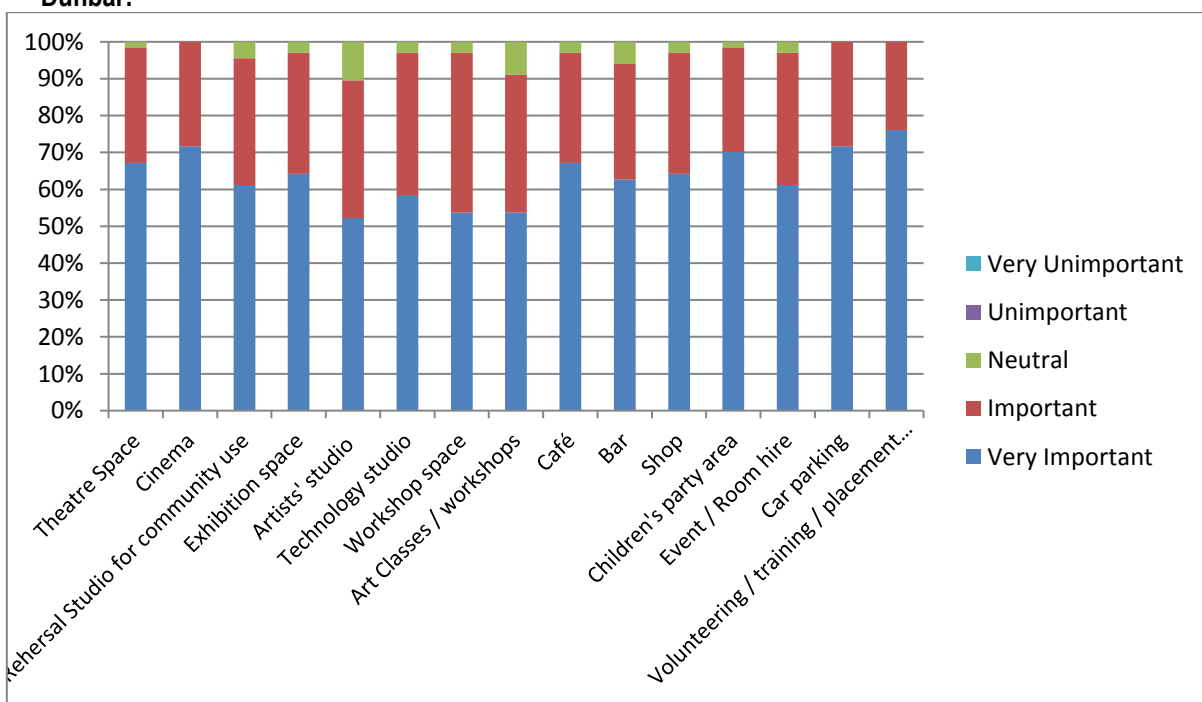
Online:



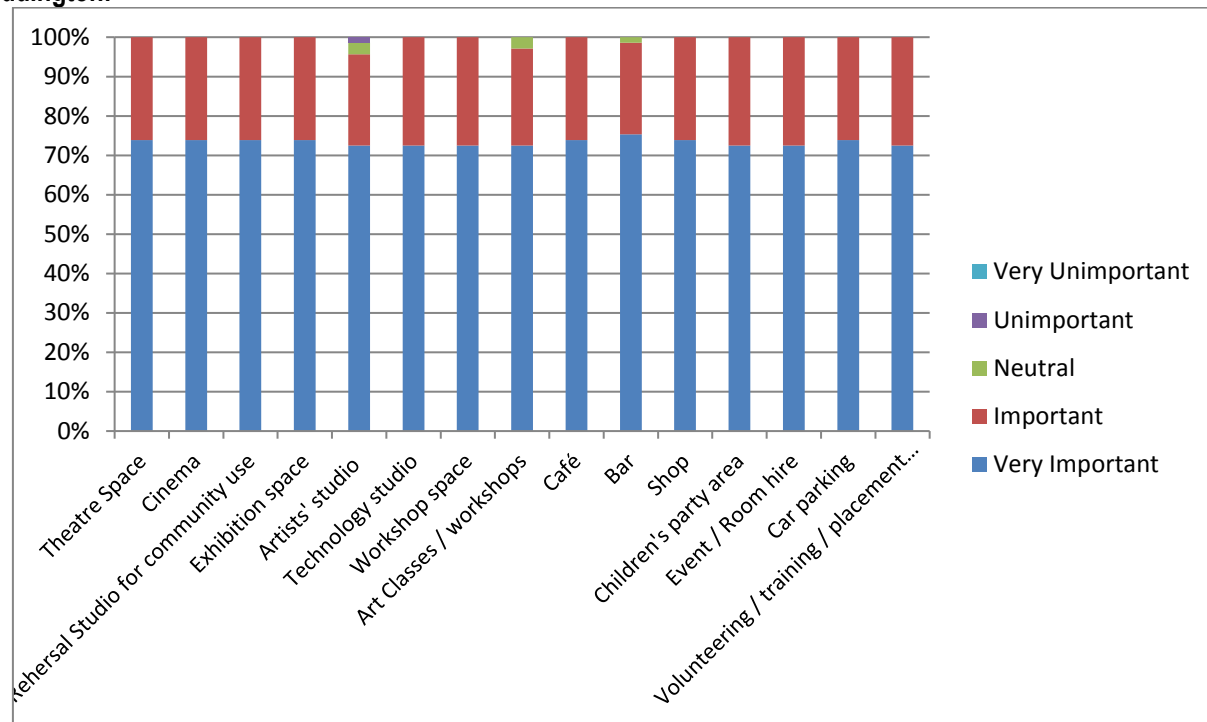
North Berwick:



Dunbar:

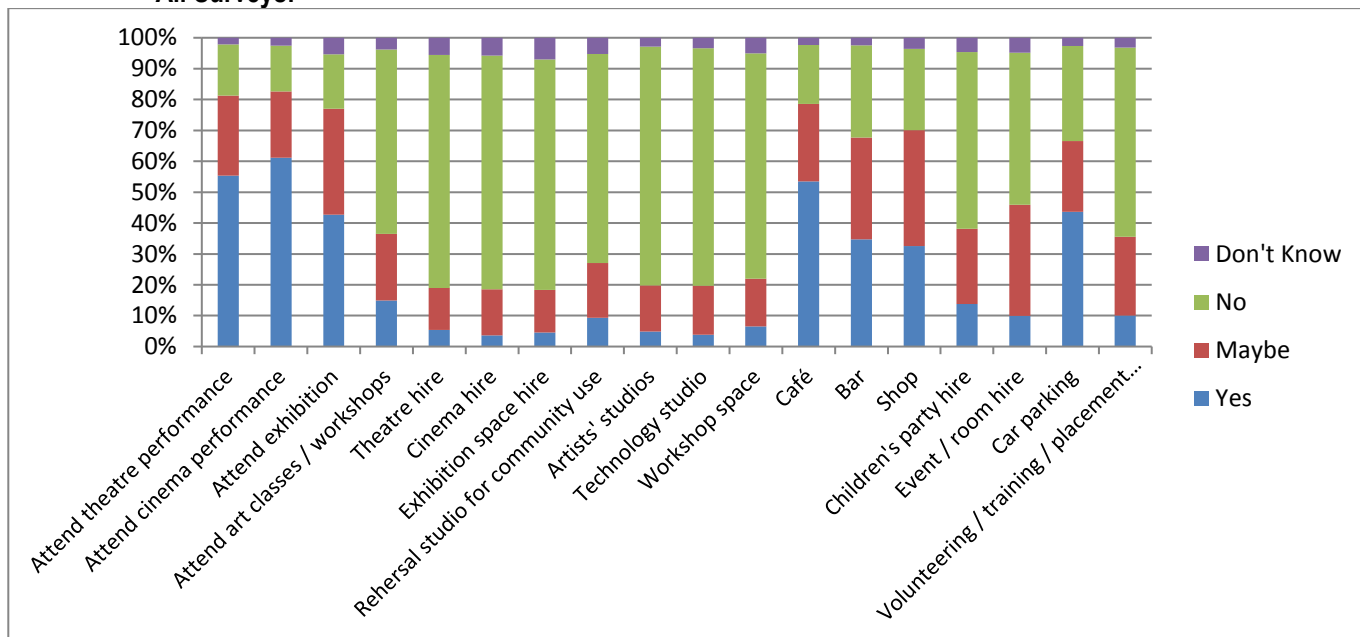


Haddington:

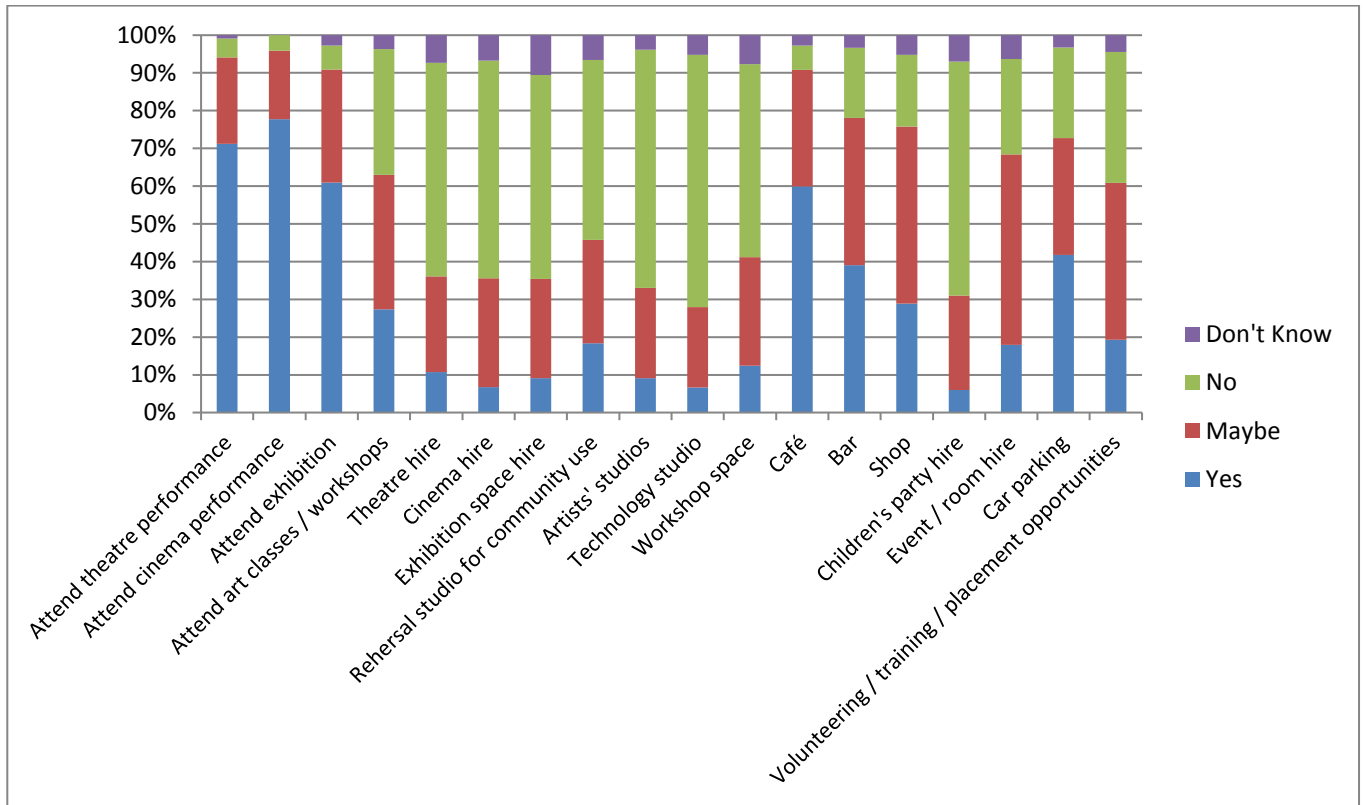


7. Would you attend / use / participate in any of the above? (Please select one response for each)

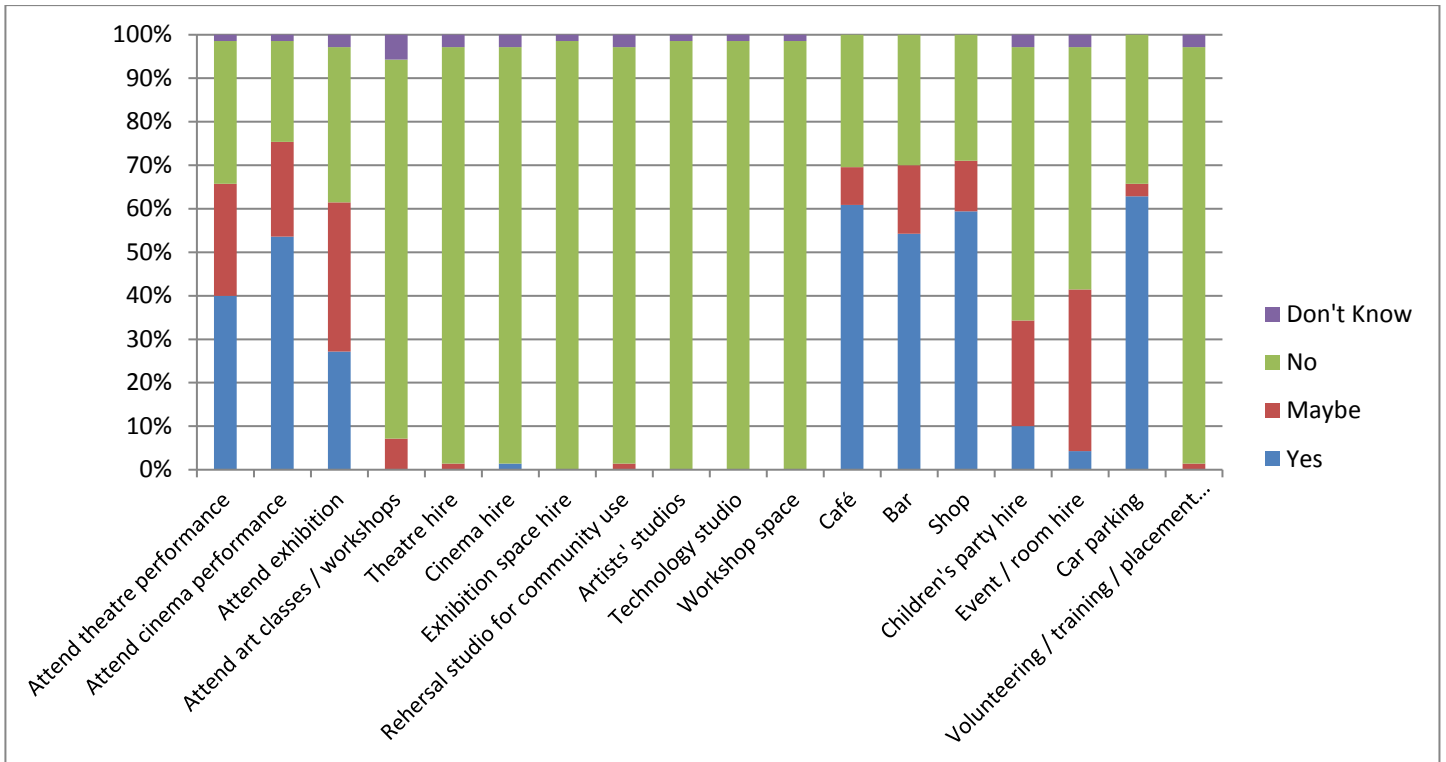
All Surveys:



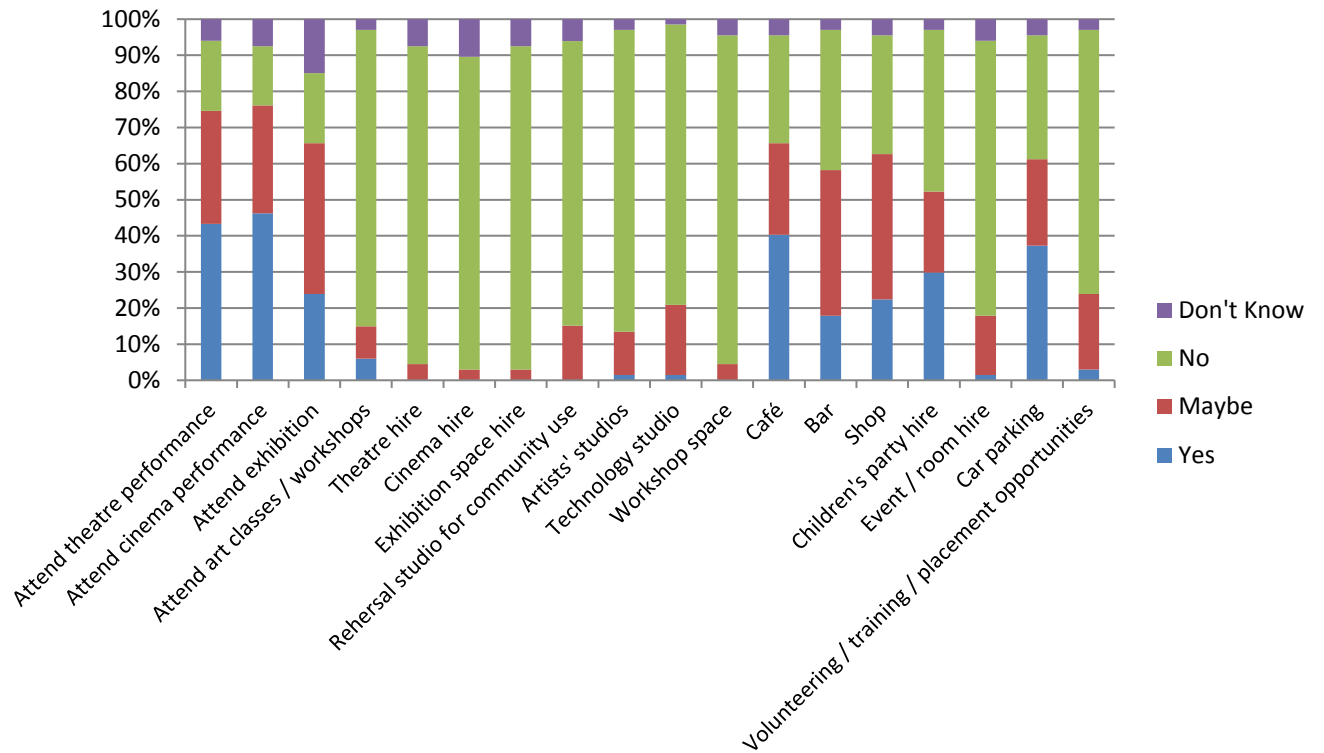
Online:



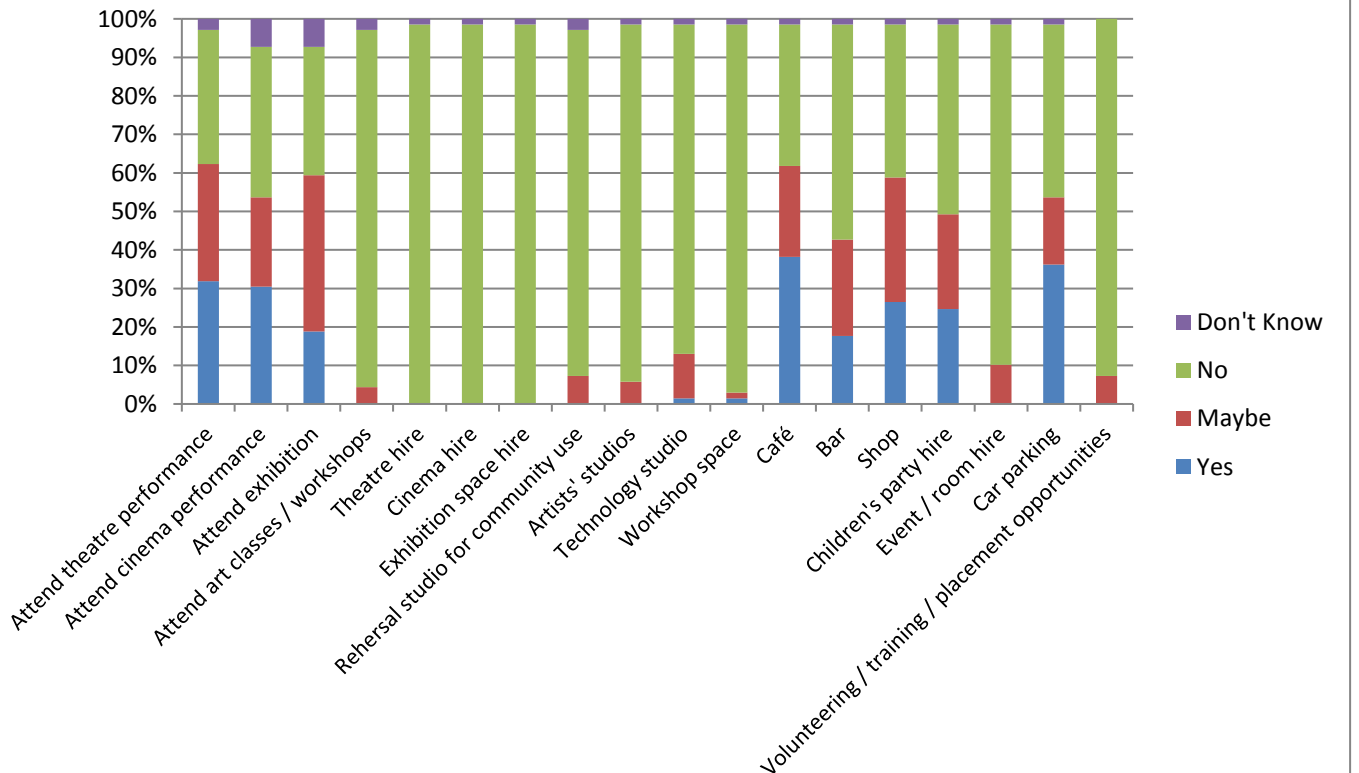
North Berwick:



Dunbar:



Haddington:

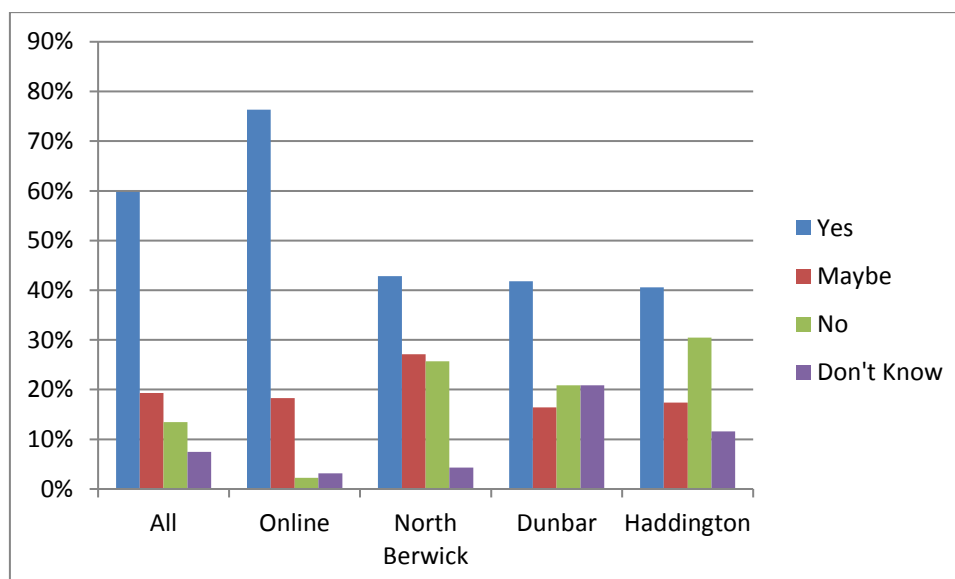


8. If you have any other suggestions or would like to expand on any of the above facilities / services please do so in the box below?

A Drama performance area with audience space would be very useful
A space for collective exhibitions of artists would be great. Workshop space too.
Aberfeldy Birks Cinema offers an inspiring example of a community based arts project.
All these things are important to different people
All these things are important to the people who live here
Central location
Cinema would be great for this area for all ages
D/K
dance studio
Don't visit enough to use this facility
East Lothian is well catered to for sporting activities but there is very little arts/design based provision for children. What there is, is over subscribed, or aimed at young children or 'girls' crafts. Would love to see more environmental arts, design technologies, street art to engage older children.
Equipment hire (PA, lighting etc) Online booking Mailing list for events Regular, e.g. monthly, club/theme nights, e.g. Folk, Jazz etc
Flexible space is the answer - there must be plenty of examples of good community arts/social spaces from other (particularly rural) communities around Scotland. It's also important (for us, anyway) that this project is done sustainably e.g. with a low carbon footprint. I'm slightly surprised that wasn't part of the survey. Thanks - this would make a positive difference to NB.
For people who are interested in arts it's a good thing - I wouldn't travel just for it though.
Good quality community cinemas probably mean this is not such a high priority as other facilities.
I don't think that this can meet everyone's needs as it would never get started! There are many coffee shops and bars so offering this would be duplication.
I don't think we would use it, we live too far away
I don't use this kind of facility. It seems a lot of money to spend for a small town
I think a theatre in North Berwick would do very well but there is a major issue about public transport. There needs to be improved bus services between the main towns in East Lothian and North Berwick. Would want to see a big feature made of local crafts.
I think these things are all important if you want a lot of people to use the facilities
I would only use this very rarely it's too far to travel
I'm not interested but others might be
If it's going to house all these things under one roof that would be really good for the area
It would be good for people that live in area
It's just not something I'm interested in
Links with other Arts events such as Edinburgh Festival/ outdoor arts.
Live music and electronica evenings would be fabulous
music venue for bands, singers etc
nah mate
Need a good cinema
Need to be age friendly with strong and clear community ownership & lead not just usual suspects
no
No
No none
None
Not really here that often but for people who live here I suppose they need something
nothing much about music, music workshops, tuition, concerts etc which would be my major interest
Organisation should take account of the fact that not everyone operates online.
Seems like a good idea for the local people

Stained glass class in PACC is ceasing despite all 3 classes a week being full, which indicates a demand.
The events in Dunbar in summer 2012/13 where there were artists in residence and the community could take part either on a paid workshop or passing experience basis were great. I would also welcome a venue for traditional music to have a venue and for community members to be able to follow the Edinburgh ALP Scotsmusic group model of learning and sharing music skills - it is a great inter-generational model.
There is no mention of a music concert venue. Would that be part of the theatre? If so please give consideration for acoustics.
These place are important but it's too far for me.
These things are all important but they need to do more to keep kids of the streets
They all seem good
They all sound great if it happens?
Think this area needs something there's not a lot to do.
This doesn't interest me but I know a lot of people will be happy if it does eventually get built
This would be good if it ever happens, there's been talk for years
This would only be good for area, I hope it happens
Town centre location is essential as it will enable those who travel by train to get to it and will support the growth and energy that is very apparent in the town right now.
users where able, could volunteer to man the centre
We have several venues available in North Berwick already, which people seem to use successfully for Art, Music, Cinema, Parties, and rehearsals.
Workshop or covered area large enough to paint scenery for shows, pantos etc would be great (eleven foot high)
Would bring some life back to the area

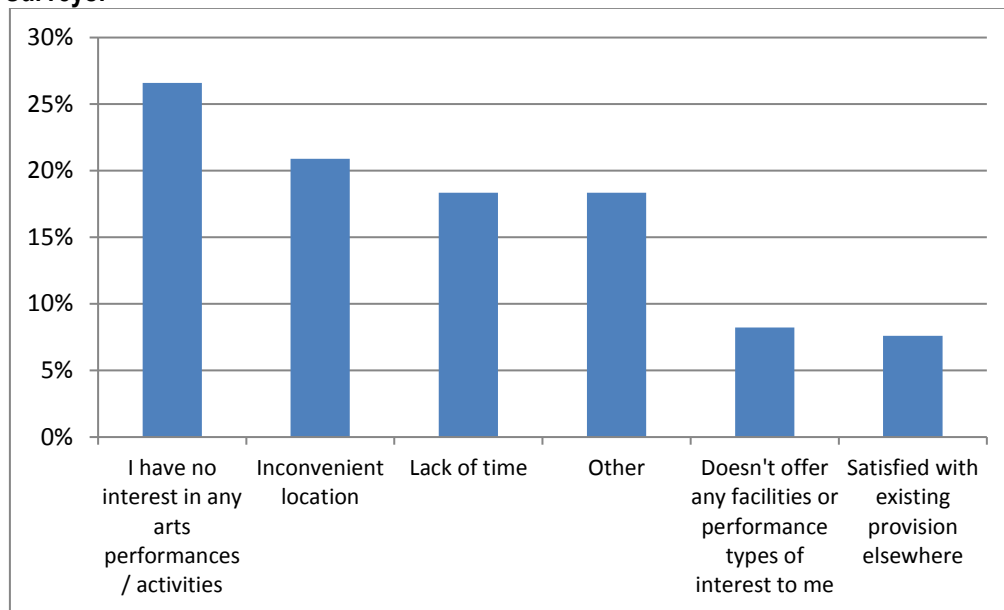
9. It is proposed that a new Arts Centre is established in North Berwick. Would you make use of this facility?



	All		Online		North Berwick		Dunbar		Haddington	
Yes	257	60%	171	76%	30	43%	28	42%	28	41%
Maybe	83	19%	41	18%	19	27%	11	16%	12	17%
No	58	13%	5	2%	18	26%	14	21%	21	30%
Don't Know	32	7%	7	3%	3	4%	14	21%	8	12%
Total	430	100%	224	100%	70	100%	67	100%	69	100%

10. If you answered 'maybe' or 'no' to Q9 can you explain why? (Please select all that apply)

All Surveys:



	Frequency	Percent
I have no interest in any arts performances / activities	42	27%
Inconvenient location	33	21%
Lack of time	29	18%
Other	29	18%
Doesn't offer any facilities or performance types of interest to me	13	8%
Satisfied with existing provision elsewhere	12	8%
Total	158	100%

Other
depends what is offered
Depends what it is.
Depends what was on
From another country
I'm not from this area
I'm on holiday
I'm on holiday
If I was here
If I was in the area I would use it
If in area will use it
If something of interest I would go
If visiting area
Ill Health
It depends on what is on offer
It depends what is on offer. I like to do things locally if possible but at the moment tend to go to Edinburgh or further afield for these sorts of activities.

It would depend on the programming and quality. Would be great to see some innovation - the Puppet Festival always brings in interesting international companies. Peter Potter Gallery in Haddington work with interesting artists and Summerhall in Edinburgh is great. There seems to be a lot for mainstream but nothing very quirky and I think there is an audience for this.

None of the above

Not from here

Not from this area

Not in this area

Not into art

Not local

Only here on holiday

Only if something really special I wanted to see

Too old

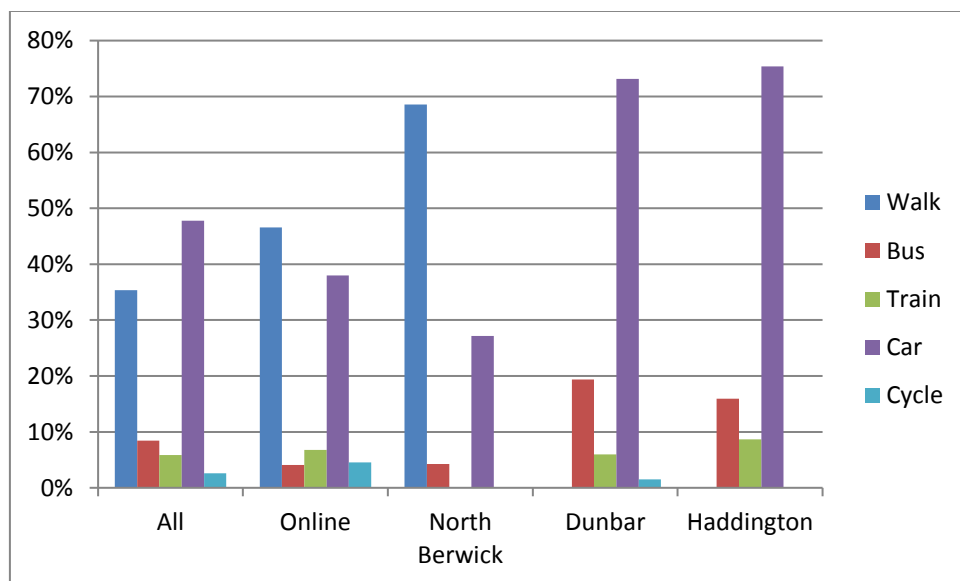
Totally depends on what is on offer...

Won't be in area

Would need to know how programming would impinge on existing venues

Would only use it when visiting friends

11. If you were to make use of the North Berwick Arts Centre how would you prefer to travel there? (Please select one answer)



	All		Online		North Berwick		Dunbar		Haddington	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Walk	151	35%	103	47%	48	69%	0	0%	0	0%
Bus	36	8%	9	4%	3	4%	13	19%	11	16%
Train	25	6%	15	7%	0	0%	4	6%	6	9%
Car	204	48%	84	38%	19	27%	49	73%	52	75%
Cycle	11	3%	10	5%	0	0%	1	1%	0	0%
Total	427	100%	221	100%	70	100%	67	100%	69	100%

12. Are there any social issues or particular sections of the local community that the North Berwick Arts Centre could particularly benefit? (Please state in the box below)

A venue for young people and to mix the community so all ages can learn together.
Access to a cultural centre for people who may find it hard to travel - young, old, parents with small children, the unwaged
All ages would benefit
All of the community
All people
All sections would benefit
All surrounding areas would benefit
All the community will benefit
All the people in this area
All the people that attend
All the people that go and businesses close to it and the bus companies
All the people that would go to it
Anything would be great
Anything at all would be a bonus for this area
Area needs more entertainment
Be good for children's' groups and senior citizens etc.
Believe that elderly or those not working are well catered for. Teenagers & those working would particularly benefit. School would benefit enormously for events & volunteering as have to pay FES for use of their own school out of hours & facilities (e.g. sound systems) poor.
Benefits for 8+, teenagers and young people - if it's a programme that appeals to them and it's not packaged as 'education.'
Bring in jobs
Bring in more people
Bring in tourists
Bring jobs to area
Bring more people to it
Bring people into the area
Children
D/K
Depends what venues they have on
disaffected and unemployed young people throughout East Lothian could benefit from community projects at the centre
dk
Don't know
Don't Know
don't know
Drama groups in NB would benefit from rehearsal, training workshops and performance spaces. Depending on the facilities available it could also be a future venue for One-act play festivals.
eh idk
elderly, disabled,
Encourage everyone to take part and view a large variety of art, in particular vulnerable groups who would not have otherwise had access.
Everyone
Everyone that's interested in culture
Get the tourists
Good for all
Good for area

Good for younger people
Good idea
Good, I hope it happens
Help other businesses in the area
Hopefully bring jobs
Hopefully will boost revenue for the area
I am a local artist, and I think provision of studio space for artists is greatly needed around NB.
I can't really comment as I'm not that familiar with area
I feel it would benefit all
I have a child with autism. There is generally very little opportunity for him to take part in local activities. He doesn't like crowds/bustle so any dedicated sessions just for children/adults with additional support needs, where it doesn't matter if they make a noise etc, would always be welcome.
I think any think would be a good thing
I think anything would be better than nothing which is what they have at the moment
I think if it's going to have all the above things in it all aspects of the community will be covered
I think it would be a benefit to the entire community
I think it would benefit the local community
I think it would make the Rts more accessible to all the community if the facility was on the doorstep. Travel costs and getting to and from Edinburgh are a put off. There is a lot of talent around and it would be wonderful to have top class facilities where people could work and perform.
I think North Berwick and surrounding areas would benefit for any kind of venue
I work with many families and young people of low income across East Lothian and would like to see a balance of provision which allows all sections of the community to access the centre and take part. Photography, choirs, traditional music workshops, classes, community choirs, street /community bands have had great success in Edinburgh and in limited areas of East Lothian in achieving this community mixing. Pricing is all important - needs to be affordable to those on low/ no income.
I would support an Arts Centre if it were focused on those who wouldn't usually access fine arts. But I am not convinced that we don't have the venues, maybe just not the resources and people (paid),
I would think all of the community
I would use but not very often
I'm not familiar with local community
Ideally the Arts Centre would appeal to all ages to reflect the community.
If I was in the area I would visit
if you're into art it would be a benefit
Intergenerational Local care home residents/housebound to have access and supported to attend by travel and support
It has the potential to offer activities and facilities for everyone from young children to older adults.
It would be good for businesses as it will bring in more tourists
It would be good to provide facilities and encouragement to young local musician via rehearsal studios, workshops and a live venue, similar to The Space
It would be really good for people in the area and surrounding area
It would enable one venue for all members of the community to use as various times
It's a bit out of the way
Jobs
Make it affordable for people
Maybe people that unemployed
Mentally handicapped -dementia sufferers and children especially
More for the younger generation
More for young people
More things for kids to do
More tourists
Music/ recordings and lack of events
Need a nice soft play area for kids

Need more for area
Need something to bring people to the area
Needs to be an area for use of digital technology/game experience to engage younger people in the centre. Real opportunity here I feel.
No
No idea
No none
None
not sure
Not sure
Not Sure
Not sure I think possibly the younger sector
Not Sure, I think all the community
Not sure, probably everybody
Once 'The Space' is demolished there will be a gaping hole in the number of venues young people can go! A vibrant cultural hub - particularly with cinema and rehearsal rooms - will be a useful addition to the town.
Out-of-work school leavers could attend workshops or pursue solo or group projects in the workshop or other spaces.
people of all ages
People who need more social contacts and places to meet Older people who don't have family nearby working people who don't get time to meet community
Perhaps a North Berwick choir
Provide facility for local artists. Also local Drama groups and social occasions
Providing facilities to the school age children (including teenagers) in the town would represent a well-directed investment in young people's futures. The Space has been able to provide some of these facilities; it will certainly leave a provisioning gap when it is eventually closed.
Put it at Dunbar
Really important to make the centre accessible for young people, and to consider how to make it accessible to young people living outside NB area, who may have difficulties with transport - either by doing outreach, or by organising workshops with transport attached. I also feel it would be very useful for young people to have access to affordable studio, workshop/ rehearsal space, and if possible support provided for them to make the best use of that, especially those who do not have the confidence, networks or finances to engage with arts activities. Placement, volunteering and training opportunities very important - for young people but also for adults. Intergenerational work would be valuable. Need to target some work to include those who do not currently engage with the arts but who could benefit
School pupils
Special opportunities to participate in, or enjoy, the arts should be provided for teenagers.
spread out (disparate) community so greater integration
Teenagers would benefit from volunteering/helping/performing. Lack of provision for teenagers in North Berwick currently
Teenagers/youth - with Space due to leave next year, there won't be much in the town for them to do. This is an opportunity.
The area needs more venues for jobs and to bring more tourists
The bus service would have to improve
The businesses in this area would benefit as it would bring in more tourists
The high school would benefit in having a professional theatre, workshop, studio in their area. and for developing the skills for aspiring actors, technicians artists, photographers.
The Schools
The whole community
The young people
The young, parents and the old - i.e. all!
the young, the old, the disadvantaged--social inclusion
The younger generation but older people too
The younger people
The youngsters

There are a number of very committed local youth drama organisations, from NBHS's Shakespeare group to Indelible Arts Youth Theatre.
Those with disabilities that find travel to facilities in other population centres difficult or impossible
To be a forward looking Arts Centre that supports all of the community, not just retired people or those with children - for example the Pier Arts Centre in Stromness, Orkney is a great example of how a remote location needn't mean mediocrity or being stuck in the past.
To be inclusive for all sections of the community but as outlined in your proposal to offer young people training and employment in the arts, hospitality and tourism would be particularly welcome in the town.
We need more things of interest like this in area
Will be good for all the community
Work experience for adults with a learning disability.
Would be good for area
Would be good for younger people
Would be great for kids, especially older ones.
Would benefit all aspects of art
Would benefit Local Community & Outwith
Young adults
Young people
Young People
Young people - jobs Older population, involvement in their community
Young people and young people with additional support needs
Young people employment Older population
Young people, elderly, people who have no car could benefit from local art centre
young persons
Younger Generation needs entertainment
Youth
Youth / teenagers
Youth Groups

13. Do you have any other thoughts or opinions on the creation of an Arts Centre in North Berwick? (Please explain below)

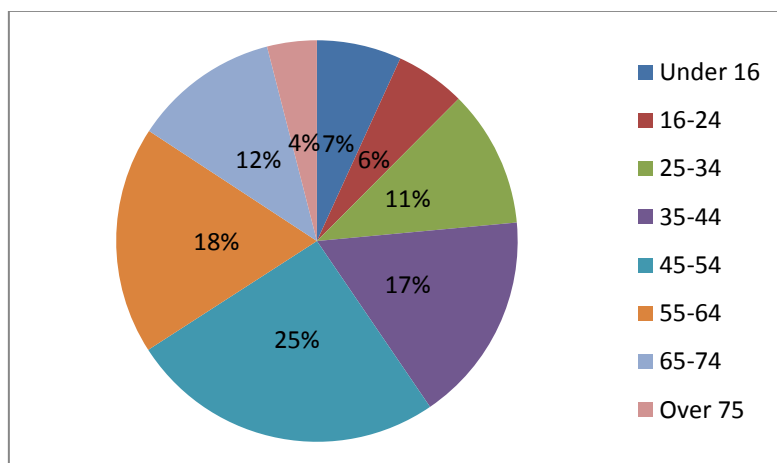
A centre that can bring together the town's two main demographic groups, families and retirees, through the arts would strengthen community cohesion, particularly as the town is expanding and there are very few alternatives in the area. Currently we either go to Edinburgh or the Brunton theatre, which makes a trip to see art events a much longer, and more expensive event. Frequent exposure at a local scale would be something I would make use of, especially as I have daughters who themselves are artistic and creative people. Location and accessibility within the town will be very important.
a fantastic idea that I hope comes to fruition
Although desirable, I don't think we need to wait for a building. If we pooled, organised and opened-up the existing resources within a single umbrella organisation, with a simple booking system, we could achieve a lot, and strengthen the case for a building by the resulting increase in arts activity.
An arts centre adds a cultural vibrancy to the life of the town. It encourages creativity and with financial support, is exposes all demographics to wider cultural experiences.
By having such a facility, local children encouraged to participates in ARTS
Centrally located and adapting existing building very important for me. I would not patronise a sterile new out-of-town build to anything like the same extent, if at all. If a down-town location necessitated dropping some facilities, such as party space, which is well served here already, or relocating some activities, it would still be worth it. Some proposed activities seem to have a natural affinity for facilities at The Space?
Could this be somehow given to the young people of North Berwick
D/K
do not situate it in THE SPACE because it is very useless
Don't be bullied by the community council!!!! Get a good cross section of the community involved, not just the usual suspects.

Essential to fill a huge gap in the cultural market.
Get big groups in to play
Good idea
Good idea the area needs something
Good idea. I have always felt that the theatre in Musselburgh should have been in North Berwick or Haddington where there a range of good eating places to go to before you go to the theatre/cinema....and this is a very important aspect of going out to the theatre/cinema.
Great idea and there's definitely a need.
Great idea lots of Arts/music in North Berwick and surrounding area
Great idea. Hope it comes to fruition.
Great to have something in the East of the County and makes sense to build on the fact that NB is already a tourist destination.
Have lots of events going on in it
I am an artist who has moved to East Lothian and although I was successful and had my own studio in the West of Scotland, I find it very hard to become involved in the Arts community in East Lothian, despite submitting work to various bodies. It is difficult to get even a courtesy response from many of the galleries and agencies in East Lothian
I feel the need for a small theatre venue within the east Lothian area and North Berwick would be well suited.
I think it is a brilliant idea and hope the plans go ahead - I would definitely use it
I think it is a fantastic idea, I have been to the Birnam Arts Centre in Perthshire and was very impressed with the centre and the quality and variety of their arts programme. If we could have something similar it would add a great deal to the town.
I think it would create a lively centre for creative people. A hub of art to see in the making and to buy.
I think it's a great idea and will interest others from throughout east Lothian and beyond
I think it's a great idea!!
I think that it should reuse existing buildings and could be spread over more than one location as North Berwick is a small town so I don't think that using different buildings would be a problem.
I'd love to join the community choir but work full time, wish it was held in the evening as Karen is excellent choir leader.
I'd very much like to see something along these lines in NB. Even if some of the facilities wouldn't be of direct interest to me, I know they would be to much of my friends and family, and the lack of a cinema anywhere closer than Edinburgh is an obvious shortcoming for East Lothian.
If I come back and it is operational I will visit
If it goes ahead they need to make use of it and have things going on more regularly
If they're going to do it they need to cater for all ages
is it sustainable financially--- is it co-ordinated with other venues
It can benefit the whole community as cultural activities can cross generations and ensure multi-age group activities.
It is a great idea (see other ideas above)
It must happen.
It must have car parking nearby
It sounds a very good idea which would bring great benefit to the local community
It would be an asset to the community. I often have to travel to Edinburgh or elsewhere to access the arts facilities I want but would prefer to do it with local people.
It's a good thing for the area
it's quite a good idea
Just if it had a various use then everyone would benefit especially things for kids to do
Just that it all sounds good
Just that it would be a good thing for the area
Kids drama classes would be great
light (and/or lit) and airy space would be good; and accessible
Look at what are successful innovative arts centres are doing, speak to their programmers, maybe Edinburgh Sculpture Workshop, Fruitmarket for Youth training + opps and Summerhall. Might help?
Looking forward to it happening
Make sure that it is run by a real representative cross section of the community. Got to be affordable so not just for the NB

well off.
Much needed in North Berwick
NB is a growing community but far from town with no good public links to other art venues in EL. Needs to have art centre and population expansion should be recognised.
Need a soft play for kids
Need to understand relationship to Seabird Centre, Community Centre, Museum, Hope Rooms all of which have some overlapping facilities in use or underused
no
No
No! Nor really interested
None
nope
North Berwick would benefit from a flexible venue that could be used by all sections of the community.
Not sure?
please make it as inclusive and open for folk to get involved and have really good open and transparent governance and make it truly inter generational get some young people on the board/trust
Put it at Dunbar
See above re Pier Art Centre, Stromness, Orkney http://www.pierartscentre.com
Seems unnecessary, North Berwick is well catered for in most areas already.
Something for writers would be great. Also a cinema as there aren't enough in East Lothian.
The idea can't be faulted in an ideal world, but in the current budget situation, we should try to focus on how we can encourage those who would not normally participate in arts activities to join in. I am not convinced that a separate venue is the answer. Perhaps more experts/paid people and more resources, but using existing venues would be more effective.
The sooner we have such a facility the better
This idea has been tried several times in the past twenty years without success
We need more of these in smaller communities. NB has so many great qualities but a sense of culture is not one of them and could be so easily attained. Look up Carmel by the Sea in California. It's a town of the same kind and they have reinvented themselves due to festivals and theatres etc.
Why North Berwick?
Would be a great thing to have.
Would be good for area
Would be great to have one and I am sure that it would be well used.
Would benefit local community
Would come if you got good bands
Would just love to see one in place, especially with a comfortable cinema/theatre - there is a great need for one
You could look at The Biscuit Factory in Newcastle.

Profile (All surveys)

Age



Where Live

Separate Analysis

Arts Group Member

	Frequency	Percent
Yes	57	14%
No	354	86%
Total	411	100%

If yes, which?

Arts Fund, PACC
Castle quilters
Citadel Arts Group
dance
Dancing
Dancing and drama
East Linton Drama Group
Edinburgh Theatre Arts
Edinburgh theatre arts & NB drama circle
Film, Museum
Flying Aspidistras
Friday Morning Art Group @ NB Community Centre
Haddington Fiddles
Hadley Court Singers
hell yeah
Indelible Arts.
Law Quilters North Berwick

Leith school of art
Little Big Screen Gullane Community Cinema
NADFAS and Art Fund
National Galleries of Scotland
NB Drama Circle
NB Drama Circle, art classes, choirs
NB Movies
NBHS Shakespeare Group, Indelible Arts Youth Theatre, NBHS Drama Club
NBHS Ukulele Orchestra
North Berwick art club
North Berwick Art Group
North Berwick Drama Circle
North Berwick Floral Art Club
North Berwick Sings
North Berwick writers/ Tyne and Esk writers
NorthBerwickMovies
Not member but supporter (Now getting OLD)
Not yet
PACC
Photographic group
Scotsmusic group, Edinburgh
Scottish Community Drama
Scottish Society of Architects Artists
Silver jewellery night class
The Mercators Drama Group (Edinburgh)
Tyne and Esk writers
Tyne and Esk writers
Tyne and Esk Writers

Contact Details if interested in being included in email list:

Provided separately

APPENDIX C

COMPETITOR ANALYSIS

C.1 Competitor Profile: Brunton Theatre, Musselburgh

Brunton Theatre, Musselburgh	
Location:	Musselburgh, East Lothian
About:	<p>Artistic programming managed by Brunton Theatre Trust (established in 1994 and a registered Scottish Charity). Venue hire is managed by the Arts Service, East Lothian Council.</p> <p>Since the completion of a major refurbishment in 2012 (investment by East Lothian Council), the Theatre Trust have been able to expand their programming of high quality artistic events. This commenced with a performance of La Traviata by Scottish Opera.</p>
Facilities:	<p>Theatre</p> <ul style="list-style-type: none"> - Steeply raked seating with flat stage and clear sight lines - Capacity of 366 <p>Venue 1</p> <ul style="list-style-type: none"> - Second venue with capacity of 496 - State of the art sound and lighting system; digital projection; cinema screen; staging; fully retractable seating; breakout rooms; changing rooms - Used for performances, film screenings and also used for private and corporate hire (including weddings) <p>Venue 2</p> <ul style="list-style-type: none"> - 250 theatre style seating - Sound and light; staging; break-out rooms; private bar access <p>Bar and Bistro</p> <ul style="list-style-type: none"> - Open before and after shows, interval drinks can be ordered on arrival - Serves snacks, lunches, pre-theatre suppers (special 2/3 course pre-theatre packages are available for selected performance evenings) - Open daily (9am-5pm) and all evenings when there is a performance (to 7.30pm) - 3 year lease agreement with Bistro at the Brunton Theatre
Programme of events:	<p>Offers quality music, theatre, dance, comedy, children's shows and films year round. Includes touring performances, tribute acts, classical music, talks and lunchtime performances. Film showings include new releases and National Theatre Live performances. During 2012/13 the Theatre hosted 198 performances:</p> <ul style="list-style-type: none"> - Panto 63; drama 31; dance 12; music 46; children's theatre 27; comedy 7; film screenings 12 <p>Youth Theatre programme – meets weekly and engages in creative workshops with specialists and 2 productions. 118 members in 2012/13.</p> <p>Education and outreach activities for all sections of the community. The programme links to local schools through projects and workshops. During 2012/13 there were 6 programmes for nursery, primary and secondary attended by 1,200 pupils.</p> <p>Partnership with Queen Margaret University where theatre students work alongside the Youth Theatre and other local theatre and music groups to develop a community play.</p>
Visits	Total attendance 2012/13: 38,995 (2011/12: 35,718). This equates to 70% of the theatre's capacity.
Admission:	<p>Film: £7 (National Theatre Live: £13)</p> <p>Drama: Typically £13.75-£16 (children's theatre: £6.50)</p> <p>Music: Typically £14-£16 (but up to £35)</p> <p>Comedy: £14.50</p>
Staff and Volunteering:	<p>No direct employees. East Lothian Council are contracted to provide the appropriate staff and management services to the charity.</p> <ul style="list-style-type: none"> - Management & Admin Staff x 6 - Theatre staff x 5.5
Funding:	Contract payment from East Lothian Council

C.2 North Berwick Arts Venues

The table below displays a selection of local venues, and provides a summary of the space available for hire, the cost of doing so, and their seating capacity.

TABLE C.1 COMPETITOR VENUES				
Venue	Seating Capacity	Availability	Costs	Comments
St Andrews Blackadder Hall and Church	350	Not Tue evening, Thu am/pm, Fri evening or all day Sun but this varies	£150 - includes area for drinks etc + kitchen	None
Abbey Church	New hall - 50 Old Hall - 70 Church - 200 Dirleton Hall - 70	To be confirmed - but not available on Sundays	To be negotiated	Restrictions regarding film/performance content
Law Primary School Gym	Approx. 120	Possibly Tue, Fri PM, Anytime at weekend	NA	Already heavily booked
North Berwick Sports Centre	Approx 100	Avail. most afternoons, and Wed/Fri evenings, Sat and Sun nights generally available. Not avail mornings	Concessionary: £21.40 ph Full rate £42.80. Charge for set up/clear down. Out of hours (Sat/Sun evenings) extra £16.50 ph depending on notice/frequency of bookings	
North Berwick Rugby Football Club	95	P.M. Mon, Wed, Thu, Fri Evenings Wed & Fri	£50	None
North Berwick Community Centre	Main hall - 90 Small hall - 60	To be confirmed	£10 p.h + £5 per hour for kitchen/crockery. Also £14.77 ph for after 10pm weekdays and after 12noon Sat	Costs subject to change (especially after hours cost)
North Berwick Scout Group Hall	80	Available Fri, Sat, Sun evenings	£10ph + £10 refundable deposit	None
North Berwick Masonic Hall	80	Available all week except Tue	Open to discussion should this be long term	Contact to discuss requirements
County Hotel	Up to 50. Can adjust seating to suit	Available except first Tues, second Wed and last Fri evenings	Free unless upstairs bar open	Big screen in function suite for film screenings
North Berwick High School Hall	Varies	Weekdays 6pm to 10pm, all day weekends. Potential availability at other times	Assembly Hall £43.92ph + cleaning. Janitor costs also if out of core hours	Also hire out any classroom, canteen, drama room, 2 gym halls, library and social area
Royal British Legion	n/a	Mon to Fri afternoon, Tue and Wed nights	£20	None

C.3 North Berwick Cafes/Bistros

The table below presents an audit of the café/bistro establishments in the North Berwick area.
Establishments have been presented in order of distance from North Berwick High Street.

TABLE C.2 NORTH BERWICK CAFES/BISTROS							
Name	Location	B/fast	Lunches	Dinners	Coffee/ Snacks	Licensed/ Bar	Opening Hours
JP's Deli and Cafe	High Street, NB	✓	✓	2 Saturdays per month	✓	✓	Mon – Sat (09.30-17.15) Sun (11.00-16.00)
Buttercup Café	High Street, NB	✓	✓	Greek nights during selected months	✓	×	-
Tea at Tiffany's	High Street, NB	✓	✓	×	✓	×	Mon – Sun (09.00-16.00)
Cake Café	High Street, NB		✓	×	✓	×	-
Zanzibar Coffee Shop	High Street, NB		✓	×	✓	×	Mon – Sat (09.00-17.00) Sun (10.00-17.00)
Charlie's Café	High Street, NB		✓	×	✓	×	Mon – Sat (09.00-17.00/30) Sun (09.30-16.30)
Why Not?	High Street, NB				✓		Mon – Sat (10.00-17.30) Sun (11.00-17.00)
Westgate Galleries	Westgate, NB	✓	✓	×	✓	✓	Mon – Sat (10.00-17.00) Sun (12.00-17.00)
Poonthai's Restaurant (Thai Restaurant & Coffee Shop – also serves Scottish food)	Westgate, NB	✓	✓	✓	✓	×	Mon – Sun (10.00 – 22.00)
Herringbone	Westgate, NB			✓		✓	Mon-Sun (09.00 – 21.00 to 00.00)
Steampunk Coffee	Kirk Ports, NB	×	✓	×	✓	×	Mon – Sat (09.00 – 17.00) Sun (10.00-17.00)
Gelateria Alandas Ice Cream Parlour	Quality Street, NB		✓		✓		
Signals Bistro (Restaurant within B&B)	Quality Street, NB	✓	✓	✓	×	✓	Mon-Sun (08.00 – late)
Zitto's (Italian Wine Bar)	Quality Street, NB	×	✓	✓		✓	Mon-Sun (12.00 – 23.00 – 01.00 Fri & Sat)
Mad March Hare (Coastal Communities Museum Café)	School Road, NB	×	×	×	✓	×	Jun-Sept Wed – Sun (11.00 – 16.00, CURRENTLY CLOSED)
Strings Café	East Road, NB	✓	✓	×	✓	×	Summer only Mon – Sun (10.00-17.00)
Scottish Seabird Centre	Harbour, NB	✓	✓	×	✓	✓	Mon – Sun (10.00-17.00/30/ 18.00) depending on day/month
Rocketeer Restaurant / Lobster Shack (Restaurant and food van)	Harbour, NB	×	✓	✓	✓	✓	Rocketeer & Shack: May – Sept May: weekends only Jun – Sept: 12.00-20.00

**TABLE C.2
NORTH BERWICK CAFES/BISTROS**

Name	Location	B/fast	Lunches	Dinners	Coffee/ Snacks	Licensed/ Bar	Opening Hours
Garden Café, Dirleton Gallery	Manse Road, Dirleton, NB	x	✓	x	✓	x	Tue-Sun (10.30/11.00-16.00)
The Café at Merryhatton (Garden Centre)	East Fortune	✓	✓	x	✓	x	Mon – Sun (0900-1700)

APPENDIX D
ECONOMIC IMPACT ASSESSEMENT

D.1 Introduction

This section provides an assessment of the potential economic impact of a North Berwick Arts Centre of the model identified in Section 5 on the local visitor economy. The economic assessment covers the main income generating visitor activities associated with the Centre, namely attendance at paid-for performances and café/bar/bistro visits.

The economic impact assessment identifies the impact on the visitor economy that would be generated in a typical year at the local East Lothian level assuming achievement of the visit numbers identified and analysed in Section 6. The visit numbers are considered to be the minimum which could be attracted and therefore this should be considered the minimum economic impact. The assumptions underpinning the impact assessment are based on a combination of industry estimates, the surveys which were conducted as part of this study, and our own understanding gained through considerable experience working with arts facilities within a variety of contexts. Assumptions and supporting evidence are explained in this section.

The multipliers are taken from the *Scottish Tourism Multiplier Study* and additional data has been sourced from the *Scottish Annual Business Statistics*. Given that the Arts Centre does not currently exist, there are no existing figures pertaining to visitor spend etc. that would typically support and economic impact assessment. This has resulted in the reliance on industry estimates.

D.2 Visitor Impact

D.2.1 Visit Number and Type

The table below presents the anticipated visit numbers by visit type to the North Berwick Arts Centre (see Section 5.2, from p.42 for visit number analysis).

TABLE D.1 VISIT NUMBER BY VISIT TYPE		
Visit Type	Audience Type	No. of Visits
Paid-For Performance	Immediate Local	27,800
Café	Local (Paid-For Performance)	13,879
	Local	11,780
	Day Visitor	4,278
	Tourist	2,569
	Café Total	32,506

D.2.3 Average Daily Expenditure

The assumed average daily expenditure for each visitor type outlined above is summarised in the following table.

TABLE D.2 AVERAGE SPEND PER HEAD		
Visit Type	Audience Type	Average Daily Spend per Head (£)
Paid-For Performance	Immediate Local	11.60
Café	Local (Paid-For Performance)	3.00
	Local	8.00
	Day Visitor	24.00
	Tourist	52.00

Average daily expenditure is based on the following assumptions:

- Paid-for performance visits amongst the immediate local market (living within 15 minute drive time of the Centre) spending an average admission across all performance types of £8.60 and spending a modest amount on travel
- Café visits amongst audiences attending paid-for performances spending an average of £3 per head on catering at the Arts Centre in addition to above spend
- Café only visits amongst the local market spending a modest amount on travel and an average of £3 per head on catering at the Arts Centre
- Café visits amongst the day visitor market spending more on travel, an average of £3 per head at the Arts Centre Café, spending a modest amount on catering elsewhere, a modest amount on retailing in the area and a modest amount on other entertainment (e.g. visitor attractions etc) within the area.
- Café visits amongst the tourist market spending a more substantial amount on travel, an average of £3 per head on catering at the Arts Centre, spending a more substantial amount on catering, retailing and other entertainment in the area and also spending on accommodation. East Lothian Council's *Tourism Events Strategy 2010-2015* indicates an average spend per head amongst tourists of £52 per day. This is based on research by Queen Margaret University into the impact of a series of events during the Homecoming 2009 celebrations.

D.2.4 Gross Expenditure

The gross expenditure associated with the anticipated visitor related expenditure from visits to the North Berwick Arts Centre is as follows:

TABLE D.3 GROSS EXPENDITURE		
Visit Type	Audience Type	£
Paid-For Performance	Immediate Local	322,480
Café	Immediate Local (Paid-For Performance)	41,637
	Local	94,240
	Day Visitor	102,672
	Tourist	133,588
TOTAL		694,617

The gross expenditure estimates include both on-site and off-site expenditure associated with a visit to the Arts Centre in accordance with the above assumptions.

D.2.3 Net Direct Impact

The gross impact does not consider the impacts of displacement. Displacement occurs with visitor attractions where one visitor attraction displaces activity from other attractions. As a result of displacement the visitor activity at any given site may not be new or additional economic activity, but include an element that is transferred or displaced from other sites. The measurement of displacement is complicated as it requires an insight into visitor motivations and intentions i.e. in this case the extent to which the Arts Centre is the reason visitors are visiting North Berwick. Given that the Arts Centre does not currently exist, it has not been possible to ask visitors such questions. This also makes it difficult to assess the extent to which visitors would be likely to select the Arts Centre instead of or in addition to existing North Berwick attractions and facilities.

The following displacement factors for the North Berwick Arts Centre have been assumed.

TABLE D.4 DISPLACEMENT FACTORS		
Visit Type	Audience Type	Displacement
Paid-For Performance	Immediate Local	15%
Café	Local (Paid-For Performance)	15%
	Local	90%
	Day Visitor	85%
	Tourist (overnight)	70%

These are based on the following assumptions:

- Paid-for Performance, Local: 15% displacement in accordance with the assumption that 25% of the currently engaged art-going audience would elect to use the North Berwick Arts Centre in place of existing facilities and that the new Arts Centre would stimulate a 10% growth in art attendance activity

- Café, Local (paid-for performance): 15% as per above
- Café, Local: 90% displacement. Given the level of café provision currently in North Berwick, it is highly likely that the majority of locals will select the Arts Centre café in place of other existing cafes
- Café, Day Visitor: 85% displacement. It is highly unlikely that the Arts Centre will be the primary reason for day visitors selecting North Berwick as their destination. Further, it is highly likely that café day visitors would have visited another North Berwick café had the Arts Centre not been in existence.
- Café, Tourist: 70% displacement. Again, the Arts Centre is unlikely to be a key contributor in the decision to stay in North Berwick. However the rate has been set lower than amongst day visitors given that they will reside in the area for longer and therefore visiting the Arts Centre café would not necessarily result in as much displacement as amongst day visitors

TABLE D.5 NET DIRECT EXPENDITURE	
	£
Gross Expenditure	694,617
Displaced Expenditure	328,544
Net Direct Expenditure	366,073

Applying the displacement factors identified above results in a displaced expenditure of £328,544 and therefore an **estimated net direct expenditure at the East Lothian level of £366,073.**

D.2.4 Net Additional Expenditure

Net direct expenditure does not consider multiplier effects. Multipliers are used to estimate and capture the overall economic impacts of investment and expenditure decisions. The overall impacts are usually greater than the direct impacts as these also include the indirect and induced effects – these are typically referred to as the multiplier effects.

Multipliers are derived from Input-Output tables that follow the flow of products and services in the economy. If there is an increase in demand for a product or service, producers will react to meet this increase in demand, this is the **direct impact**. This increase in output will mean that the producers create an increased demand on their suppliers and this is the **indirect impact**. Some of the increased income created by the direct and indirect impacts will be re-spent in the economy and this is the **induced impact** and includes consumer spending.

Regional multipliers typically from 1.2 to 1.5. A report produced by the Sports Industry Research Centre assessing *The Economic Impact of the Open Golf Championship Muirfield* (2013) adopted a multiplier of 1.31 at the East Lothian Level. This is based on the figure for Fife in the 2010

Scottish Multiplier Study. Applying this multiplier to the net direct expenditure produces the following net additional expenditure:

TABLE D.6 NET ADDITIONAL EXPENDITURE	
	£
Net Direct Expenditure	366,073
Multiplier	1.31
Indirect and Induced Expenditure	113,483
Net Additional Expenditure	479,556

The net additional expenditure anticipated to be produced by the North Berwick Arts Centre is estimated at approximately **£479,556**. This equates to an employment impact on the local economy of approximately **9.5 Full Time Equivalent** employment positions.

QA CHECK	
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