



**HELEN AVENELL HERITAGE ASSOCIATES &
MORAY: ARTS DEVELOPMENT ENGAGEMENT**

CULTURE SECTOR MAPPING, MORAY

FINAL REPORT

JULY 2023

CONTENTS

Page 2 CONTEXT

Page 2 OBJECTIVES

Page 2 APPROACH

Page 3 MARKET PROFILE

Page 7 RESEARCH

Reflections on current data/evidence

Reflections on sectorial conversations

Case studies

Database information

Page 13 KEY FINDINGS

Page 16 CONSIDERATIONS: NEXT STEPS

Page 17 APPENDIX

CONTEXT

The Moray Growth Deal (MGD) is a transformational package on investment for eight strategic projects which will maximise regional economic competitiveness and boost economic growth across the Moray area. The Cultural Quarter is one of these projects, which is focused on three main elements: the refurbishment of Grant Lodge to create a high-quality heritage attraction; extension and rebranding of Elgin Town Hall; and provision of a high quality hotel. Since the initial confirmation of MGD funding, the economy has changed significantly and there is a need to review the original outline business case for the Cultural Quarter project, ahead of any works being undertaken. Within that review, there is a requirement to establish an up to date understanding of the shape of and provision delivered across the cultural sector, in the widest sense, throughout Moray. Bringing experience and knowledge from two key areas within the cultural sector, Helen Avenell Heritage Associates and Moray: Arts Development Engagement collaborated on this mapping exercise with an aim to provide a tangible picture of how the cultural sector is currently functioning in Moray.

OBJECTIVES

- Who is active across heritage and arts within the region?
- How are those identified staffed, structured, and operational?
- What activity do those identified currently provide?
- Where do key challenges, developments and trends reveal themselves to be?
- What facilities, venues and meeting spaces are accessed and what is missing locally?
- How are those identified supported more widely and what provision are they currently tied into with regards networking, promotion and ideas sharing?

DELIVERY APPROACH

Between March and May 2023, both HAHA and MADE undertook a variety of activities to consolidate a representational picture of the cultural landscape in Moray. This included:

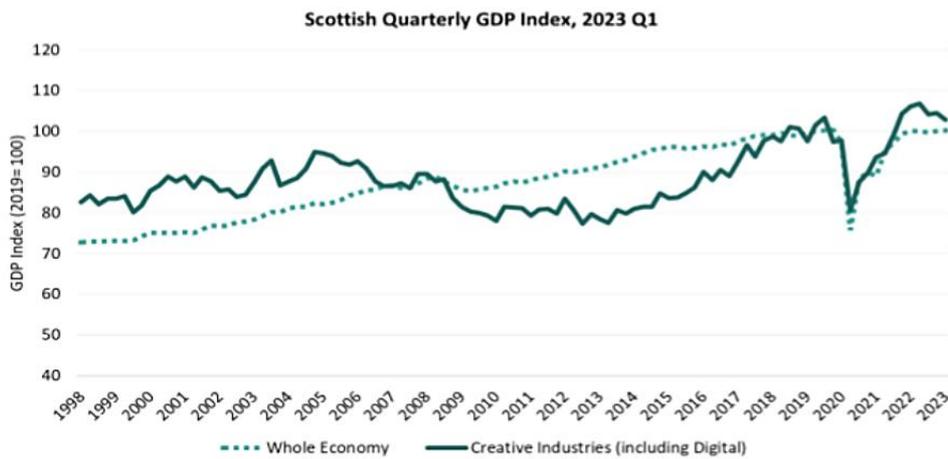
- Attending local workshops linked with the cultural quarter development
- Attending the Museums & Heritage Highland Conference and participating in discussions with sector specialists & regional stakeholders
- Generating desk-based research in relation to local context, resulting in the creation of a new resource database collating venues/networks/research/organisations across Moray
- Exploration of best practice examples of heritage-arts based partnerships, including:
 - *CHARTS in Argyll about their structure/set up*
 - *XpoNorth about potential crowd/membership models*
 - *NESHN (North East Scotland Heritage Network) about partnerships*
 - *Museums Galleries Scotland about heritage forums*
 - *Timespan about venue specific setup for heritage/arts*
 - *Research on cultural profiling incl. Helsinki & Birmingham*
- Collating and analysing existing reports and data
- Surveying a proportion of contacts directly across arts, culture & heritage

MARKET PROFILE

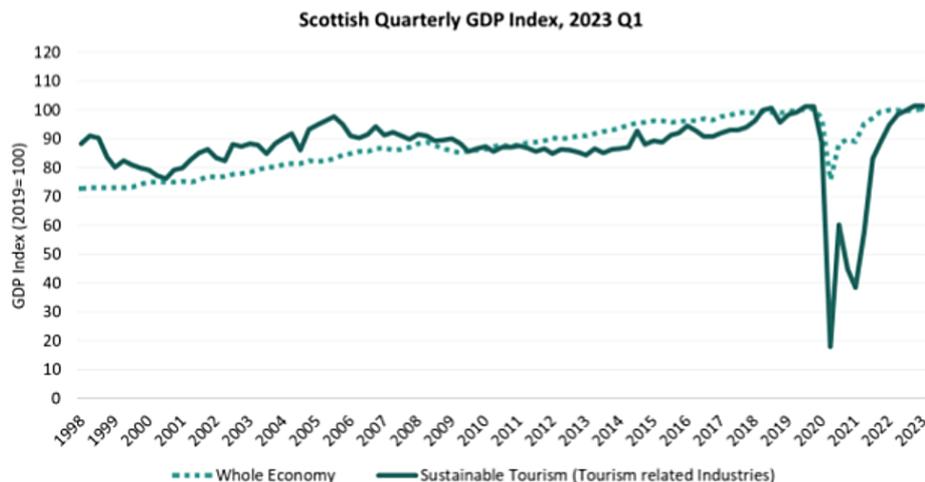
This section demonstrates interest and need in this area and an overview of local industry. It proved challenging grouping evidence by sub-sector i.e. arts, culture, and heritage, as the data sets, variations and interpretation of language and benchmarking is so varied. Thus, key evidence has instead been collated and listed, with gaps in relation to heritage findings strengthened with quotes extracted from one-to-one conversations, with the aim of shedding light on the current landscape.

National Profile

Scotland's Creative Industries were identified in Scotland's Economic Strategy (2015) as one of the growth sectors in which Scotland could build on existing comparative advantage and increase productivity and growth. As stated within the [Growth Sector Briefing for the Creative Industries](#), updated in June 2023, the latest GDP data shows that output in the Creative Industries growth sector decreased by 1.6% in the most recent quarter, whereas output across the economy as a whole increased by 0.4%; however, it can also be seen that the Creative Industries is in fact recovering and performing well, rising above pre-covid GDP, which signifies less risk when investing in this area, and proving the sector to be adaptable, flexible and resilient.



Sustainable Tourism was also identified in Scotland's Economic Strategy (2015) as one of the seven growth sectors; museum activities and the operation of operation of historical sites, buildings and similar visitor attractions falls within this categorisation – which is relevant to this research from a heritage perspective. As stated within the [Growth Sector Briefing for Sustainable Tourism](#), updated in June 2023, the latest GDP data shows that output in the Sustainable Tourism growth sector increased by 0.2% in the most recent quarter, whereas output across the economy as a whole increased by 0.4%; however, as demonstrated below, recovery post-covid is now detectable, suggesting that travel and tourism are back on the agenda of a spending market.



Local Profile

- According to Highlands and Islands Enterprise (HIE), which encompasses the region of Moray, the creative industries bring £740 million of value to the region, 5500 people work in this sector in our region and that expansion of industry, between 2010 and 2017, has seen an increase of 27% (HIE Online, 2023). This demonstrates consistent and stable progression in terms of the economic viability of creative and cultural developments, given that return can be seen across finance, workforce, and profile contexts.
- The [‘My Life’](#) survey from 2022, commissioned by HIE, provides area specific data including only 32% of survey respondents (872 in Moray) attend local events – lower than the overall Highlands and Islands average; 30% are members of local groups or clubs - same as Highlands and Islands average; and only 16% volunteer – again lower than the Highlands and Islands average. In addition, local businesses and trades are a higher priority for communities in Moray, at 30% compared to the regional average of 24%. Although rationale for these stats is not provided, it can be assumed that access to facilities might contribute to low engagement, but that community optimism (mapped at high) could allow for this to change if addressed. Thus, we could predict that an improvement in local amenities i.e. Elgin Town Hall, Grant Lodge, will contribute to a growth in community participation and investment.
- According to HIE’s [‘Area Profile 2020’](#), Moray has a marginally lower share of employment in arts, entertainment and recreation at 3.8% compared to 4.1% regionally and 4.4% nationally. This is likely linked to low employment/salaried opportunities in the sector, given that we currently only have five creative organisations with salaried staffing capacity (Dance North Scotland, Elgin Town Hall, Findhorn Bay Arts, Moray Art Centre, M:ADE and The Universal Hall) and only one (Elgin Museum) in the heritage domain that has a paid member of staff outside of heritage operations – it is worth noting that all mentioned organisations are funded on a set-duration basis and operate differently to for-profit organisations, such as Hunted Cow Studios and North Port Studios. This too mirrors the SME and sole-trade-heavy-nature of our sector, and of our area, with Moray seeing SME’s make up 87.1% of private sector employment, compared to 67.6% across the Highlands and Islands and 50.6% nationally. In March 2022, there were 13,285 registered enterprises operating in the Creative Industries growth sector, representing 7.6% of all registered business in Scotland, with the majority of enterprises in UK owned with their registered office address in Scotland (97.0%), accounting for 66.0% of sector employment in 2022. Thus, there is untapped potential and room for development in Moray particularly, in terms of strategy and leadership in this area, but also in support provision for SME’s and/or sole traders to become established and/or scale up. This type of assistance, when considered in the framework of upskilling and employability, could be harnessed as a market in itself.
- In the heritage context, out of the 19 venue-based organisations or enterprises defined by this piece of research as primarily heritage operations (excluding Moray Council Services & Historic Environment Scotland), 37% (seven) employ staff with a role encompassing heritage operations. Of these, however, 85% of these are primarily front facing roles focused on tour guiding or visitor services and only one organisation has any staff with a professional heritage management role (Elgin Museum). It is also important to note that the categorisation of the nature of organisations and businesses can change and move, one example being Johnston’s of Elgin, which has been deemed as ‘heritage based’ in the framework of this research, but as a business have recently removed the heritage section from their website. Paired with the nature of employment within heritage spaces, this demonstrates an opportunity for improvement across innovative practice, interpretation, collaboration, education and engagement, skills development, and workforce – all of which contribute to economic and social capital.
- According to the [Sector Skills Improvement Plan](#) for the Creative Industries, published by Skills Development Scotland in 2015, key gaps and opportunities are apparent across a number of areas

including a need to create more practical and work-based learning, improving digital skills in relation to design capability, use of technology to support creative storytelling, business practice, communication skills, leadership and support of freelancers. Although this predates the pandemic, recent work undertaken by Creative & Cultural Skills confirms that these gaps and opportunities remain, providing scope from which to integrate income generation activity into programming across the Town Hall and Grant Lodge, contributing to the entrepreneurial focus and sustainability of the Cultural Quarter.

- [The Economic Contribution Study: the Arts & Creative Industries in Scotland](#) (Creative Scotland & Scottish Enterprise, 2012) estimated that the sector generated an additional £3.06 billion in turnover in indirect impacts, whilst the same study also highlighted that Scotland's Creative Industries work both directly and indirectly in boosting tourism by attracting day and overnight visitors, with the strongest effects being in the Heritage and Performing Arts sectors. Given that these attractions speak directly to what is envisioned for Elgin Town Hall and Grant Lodge, there is room to tap into tourism expenditure, of which over £1 billion can be ascribed to overnight tourism motivated by the Creative Industries, and this gives rise to a direct GVA of £280 million.
- In 2021/22, local arts organisation M:ADE developed a business case for the redevelopment of a building, proposed to become a community arts venue. There is crossover in the evidence base of need and demand [within this document](#), which now weighs heavier given a number of changes to the landscape can be identified since its publication i.e. Gallery Pop closed, creative industry curriculum change/decreased offer at Moray UHI. With activity and learning within the arts fluctuating, venue-based access and provision through Elgin Town Hall, Grant Lodge and the wider Cultural Quarter development, could provide consistency and stability for communities. Embedded within the M:ADE business case is market research dated from November 2021, generated via a digital survey which received fifty responses. Although the results are more aligned with the need and demand for a community arts space, the ethos and ambition align with the Cultural Quarter, and so a number of key conclusions are shared below:
 - Respondents travel out with the region to access visual arts exhibitions on average 55% of the time
 - Respondents travel out with the region to access equipment and facilities on average 55% of the time
 - Creative workshops, exhibition openings and short courses featured as most wanted activities
 - Overall direction should be underpinned by accessibility (in financial, environmental, and programming contexts), a physical space for experimentation, dialogue, and coming together, with an emphasis on sharing ideas, learning, and being exposed to creativity. A balance of quality and inclusivity key for community belonging and engagement
- In absence of rich data in the field of heritage, please find below extracted quotes from direct interviews with individuals actively engaged in this sector in and across Moray:

*'Moray Heritage Connections was a great network but once the support from Moray Council ended (*following the deletion of the Museum Officer post), it was almost impossible to keep running it with volunteers who already had their own museums and groups to run.'*

'There used to be regular meetings (Moray Heritage Connections) and it was great to come together and share... to network... but nothing has happened with it since Covid, it's been a difficult time and the whole thing feels quite fragile.'

'Volunteers have a loyalty to their own place... you can't expect them to then run another whole organisation, we are community amateurs.'

'There is a real lack of capacity in the area... we run completely on volunteer goodwill and mostly from an older demographic.'

'We have learnt not to be dependent on Moray Council or have any expectations... we just keep our own parameters and only commit to things that our small amount of capacity can cope with. We don't want a commercial model but organisations like SCOTO have the right idea... they are 'bottom up rather than 'top down.'

'We are successful in what we do but to do more, to open more... we'd then need more volunteers.'

'Networking was the most positive thing about Moray Heritage Connections... sharing problems and challenges.'

'We operate completely with volunteers... we are down volunteers since Covid and have had to shorten our opening hours. Our model works ok but it would be hard to do more than we currently do without support.'

Currently nobody is taking the lead, but Moray justifies a culture or heritage of its own. We should not be 'silo building' but working together.'

The Cultural Quarter project is the opportunity to create a catalyst... an exciting way of bringing heritage together for visitors and for our local communities.'

'We need to address the issue of Falconer Museum and this project could help to do that.'

Conclusions to be drawn:

- 1) Data suggests that investment in cultural developments will reap economic and social return for Moray.**
- 2) There are clearly identified gaps and opportunities to generate income from the Cultural Quarter project across learning, freelancer support, business development, tourism, and community engagement.**
- 3) Local regeneration efforts have long term potential to tap into, and be funded by, national agendas across employability, workforce development, SME scaling up and tourism.**

RESEARCH

Reflections on current data/evidence

The most wide-ranging document in relation to cultural development and growth in Moray is the 'Culture Strategy for Moray 2014-17'. This is now outdated by almost a decade but the four overarching themes are still relevant; creative activities benefit health and wellbeing, cultural experiences are accessible in every community, visitors encounter a dynamic and authentic cultural offer and creative people and creative businesses thrive. It could be argued that this document was strong in vision but that lack of resources to implement the vision hindered its full realisation. It worked well as a reference point for what to aim for, rather than an operational framework from which to achieve measurable objectives.

'A Sustainable Future for Heritage & Culture in Moray' produced by Culture Radar in 2020 as part of Moray's Great Places was the next key piece of research that, despite the intervening challenges brought about as a result of the Covid epidemic, should be considered as a key baseline document. The comprehensive report set out the challenges and opportunities for Moray's heritage as evaluated in 2020, just before the Covid pandemic. The report focused on heritage and culture and included in-depth analysis of the sector in Moray with extensive consultation across both heritage venues and organisations. In this report, we have sought to revisit Culture Radar's findings to understand the key changes since 2020 and have found that the 'Key Research & Consultation Findings' (cite refer pgs 11-13) all remain valid but that the challenges around a 'heavily fragmented heritage ecology' is now even more pronounced. This is explored in the Key Findings section below.

The evaluation reports produced for 'Moray's Great Places' and 'Castle to Cathedral to Cashmere' form the other major pieces of data and evidence most recently gathered on the area of heritage, arts and culture in Moray. The primary learning from 'Moray's Great Places' was around partnership working and collaboration; how without multiple voices and perspectives, the reach and scope of the project would not have been achieved. This is further echoed in 'Castle to Cathedral to Cashmere', where commercial and third sector links proved fruitful. Over and above this, an important reflection for future impact was noted (cite refer pg 18) in relation to the creation of a 'brand' to enhance our cultural identity and sense of place. Both projects reported strength in the area of community engagement but during and post-delivery it was commented on, by those working in the sector, that more could be done moving forward to engage with local companies in terms of delivery, production and evaluation.

The pillars of wellbeing, access, attraction and growth from the 2014-2017 culture strategy are still mirrored across arts and heritage provision today, including within the ambitions of the Moray Growth Deal itself. Given this strategy has not been fully updated and much has changed since its lapse, there could be scope to bring together these reports and establish a new collective strategy and accompanying action plan to complement the Cultural Quarter development.

Conclusions to be drawn:

- 4) Proven record of arts and heritage as an economic driver. This needs to be recognised, valued and utilised moving forward.**
- 5) Collaboration and partnership are key for raising the profile, deepening engagement and improving future sustainability of the arts and heritage sectors.**
- 6) Strategic work to be done with regards generating an operational plan for culture, inc. a brand identity. 'A Sustainable Future for Heritage & Culture in Moray' already outlines findings that remain relevant to our current context; these should be drawn upon for future vision.**

Reflections on sectorial conversations

- Feedback from interviews undertaken with heritage organisations and individuals has highlighted that communication between heritage organisations across Moray is fractured or non-existent. Moray Heritage Connections is currently in abeyance and without any direction or leadership in ways of reforming.
- The profile of heritage organisations and venues shows most fall either in completely voluntary led and run, or at the other end of the scale as part of larger commercial businesses. This wide gap is a reason for some of the structural challenges of supporting heritage.
- There is a clear distinction between charity based and commercially driven creative organisations, inevitably, because of the differing financial structures, needs and approaches. Moray has only one 'Regularly Funded Organisation' through Creative Scotland, and in a landscape that is being impacted by decreasing budgets and high competition, the arts is in a vulnerable position. Collaborative working i.e. through the Culture Collective Programmes, has provided experience for new approaches to community engagement moving forward.
- There seems to be a shift in the potential ways for organisations to grow/widen their operations. Moray Council now has a Community Wealth Building Officer who is aware of procurement issues for smaller cultural groups to access service delivery opportunities - if these mechanisms were shifted to allow for such groups to provide an offer, this would enable income to be generated in new ways, in turn enhancing sustainability.
- In parallel with sustainability, other government priorities are influencing the way Third Sector organisations think about and approach their work. From fair working practices to workforce development and equalities to quality, there is a wider support required to help understand and address these priorities.
- There is a huge appreciation for the amount of grassroots work undertaken since the loss of Moray Council's arts development team in 2013. Activities such as Culture Day, The Findhorn Bay Arts Festival, Rise and MacMoray are raising the profile and variety of provision on offer and are succeeding at providing for local communities whilst attracting people into the region.
- That being said, more joined up thinking and access to facilities could further enhance consistency and growth of activity. Partners such as WildBird, the Highland Print Studio and Elgin Ceramics Club have all expressed a need and/or interest in securing suitable space and equipment. Out of the Darkness and private dance companies have reported a lack of suitable rehearsal space (without mirrored walls or sprung floors) and village halls have been rented and converted to temporary recording studios.
- The arts landscape is very diverse, with a healthy mix of third sector organisations, freelance practitioners, creative SME's and community groups and clubs. As with the heritage context, this could benefit from more cohesion as contextual placements tend to result in split communications.
- As a result of this gap across the board, there is a potential loss in opportunity to collaborate, share resources and/or raise awareness of provision. There is a strong grassroots element held across activity, which provides a richness of agency, voice and empowerment whilst showing demand and motivation for local and regional delivery and development.
- There is an array of community-based/amateur groups across multi-art forms. Those that require physical space are currently dependent on the hiring of small town or village halls. Commercial groups find it difficult to improve facilities as they are unable to access third sector capital grants.

- Elgin Town Hall is seen as the primary performing venue in Moray however as it stands there are a number of elements that make access a challenge; booking is required extremely far in advance, rates are thought to be expensive, facilities could be improved for larger shows.
- Similar feedback in relation to exhibition opportunities; Elgin Library is booked up years in advance - there is no curator or exhibitions officer, and it is managed on a hire basis, which means there is no cohesion or standardisation of shows (suitable for a community display space). Moray Art Centre is the other venue option, and although it was noted staffing, profile and accessibility has increased over the past year, there are still issues with geographic placement and misinterpretations of being part of the Findhorn Foundation.
- Heritage and art have commonalities in the following areas of need: improved connectivity, increased profile, diversifying of income and reach, benefit from additional human capacity.
- Heritage and arts also have areas of difference: the arts are somewhat ahead with regards professionalisation and securing grant funding but are less likely to have access to appropriate space and facilities. Heritage, still largely volunteer run, may not have the same sense of ambition in relation to growth, modernisation and/or innovation.

Conclusions to be drawn:

- 7) There is a benefit to approaching arts and heritage under the combined banner of ‘culture.’**
- 8) Need and demand suggest that additional human resources, and accompanying mechanisms, are required for cohesive and effective sectoral growth.**
- 9) The relationship between Moray Council and external partners needs to be carefully considered moving forward. There is a long standing history with regards to statutory services and lack of investment across arts and heritage, therefore should be sensitively handled to ensure a mutual understanding, respect, value and purpose is achieved.**

Case studies

CHARTS

‘A Culture, Heritage and Arts’ (CHARTS) network was conceived through the desire to create a sustainable future for those combined sectors in and across Argyll and Isles. It is a member-guided SCIO which aims to foster collaborative working across the whole Culture Heritage and Arts sector, create events and products that are of sufficient quality and scale to be marketable at the highest level, create an environment that supports sustainability for sole traders and micro-businesses so they can afford to stay in Argyll and the Isles and be an advocate for the needs and benefits of cultural activity.

CHARTS comprises a board of Trustees and members (never having less than 20 members at one time), who are also supported by a regional Steering Group. Members have the right to attend members meetings and have important powers under the constitution, in particular to appoint to the board and take constitutional decisions, with the membership open to any individual aged 16 or over who is a member of any of the geographic or thematic cultural hubs in Argyll and Bute. Membership is also available to practitioners nationally and internationally, collaborating with the organisation or with a particular association to development in the region.

As a network and ‘umbrella body’, CHARTS embodies multiple roles and responsibilities: fundraiser, strategic visioning, connector, evaluator, collaborator. They are actively embedded in key cultural programmes, such as Culture Collective, and are strong in best practice when it comes to supporting the talent pipeline through apprenticeships and development support. Through project funding, they generate opportunities for partnership working and avenues for freelance work. From a profiling point of view, they provide a ‘one stop shop’ for advertising and signposting as well as projecting both a geographical and sectoral inspired ‘brand identity’.

Museums & Heritage Highland

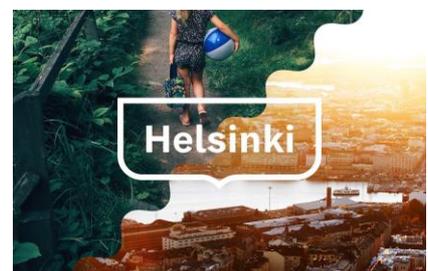
Museums & Heritage Highland was established in 2019 in response to a significant project undertaken by Highland Museums Forum. The ‘Our Collective Future’ project, funded by Museums Galleries Scotland and National Lottery Heritage Fund was an eighteen-month partnership project between 18 independent museums across the Highlands developed in response to the proposed removal of all remaining Highland Council funding support. The project investigated opportunities to increase sustainability, capitalise on collective strengths and skills to build capacity for curatorial, management activities and future fund-raising. Museums & Heritage Highland was formed as a SCIO and as a successor to Highland Museums Forum. Members include museums, galleries, and heritage organisations of all sizes across the region. The organisation operates with a paid, sliding scale membership model and includes individual membership options. Organisations out with the geographical Local Authority Highland area can also join as associate members with all rights to participation but without voting rights.

MHH aims to be a strong, supportive voice for heritage in the Highlands, promoting collaborative working and capacity building that supports members to achieve their purpose. Projects are drawn from the membership with the key aim of helping museums and other heritage organisations raise standards, engage with more people, collaborate with each other and be sustainable and resilient. MHH acts as a network for the sector and provides a portal for heritage in the Highlands. It also works to project a strong geographical and sectoral inspired ‘brand identity’ under which the independent member organisations can come together.

Place-based Identities: Helsinki & Birmingham

Both Helsinki and Birmingham provide examples of cities that have undertaken a brand exercise in an effort to build a cultural identity.

When describing the rationale for having and developing a visual identity, Helsinki City states that ‘the Helsinki brand concept is used to build and strengthen the image of Helsinki...it makes the City of Helsinki’s brand strategy visible. With a clear and unified visual identity, we get more media coverage and return on investments.’ A clear strategy is accompanied with marketing guidelines, a logo, value proposition and brand cornerstones. It is simple, colourful, legible, versatile and strong - all characteristics that feed into the narrative of ‘It’s a good life’. [Helsinki brand concept - Design Helsinki](#)



Birmingham's efforts are more recent and have been implemented to align with large scale regeneration projects and being host of the 2022 Commonwealth Games. The approach is one to bring Birmingham into attention and to challenge the negative press it has received in the past. Be Bold, Be Birmingham is defined as: a celebration, attitude, aspiration, state of mind, sense of direction, purpose, and promotion of civic pride. From street art to consistent design use, font to colour, Be Bold, Be Birmingham has lived on beyond the Commonwealth Games and has longevity in its use. [Be Bold, Be Birmingham | Birmingham City Council](#)



Synergies between these two examples are:

- The funding, resource, and contextual demand to develop an identity. Both cities have notable venues, organisations, and activity across the cultural fields.
- An existing cultural reputation from which to build on.
- An all encompassing 'cultural framework', from multi-arts representation to archives.
- An interest in tangible and intangible culture, including public art and memorials.
- Public engagement was key to the development of the brands accompanying values/narrative.
- Local authority/statutory service support.
- Simple, colourful, consistent visuals.

Conclusions to be drawn:

- 10) A core body/structure would be strategically impactful for cultural growth and potential.**
- 11) Pre-delivery financial resources have a direct impact on the success and longevity of capital projects; development money allows for momentum, community buy-in, sector voices to be heard and listened to and opportunities to build collective investment in a future vision.**
- 12) The scale and size of our geography, aligned with the volume of grassroots activity and community-led/supported provision and Moray Council/Government investment, creates a strong triangulation and significant opportunity for Moray to 'level-up' in terms of our 'cultural narrative'.**

Database information

One key element of this work was the creation of the new resource document collating an up-to-date overview of the venues, networks, research, and organisations across Moray linked with the arts and heritage sector.

This can be accessed here: *

Key reflections from the information generated are:

- The range of venues is greater than expected and many have a multi-function role in delivering arts, culture, and heritage in Moray. However, there is little coordination between these and any that exists is dependent on individual connections rather than organisational partnerships.
- There is no primary platform from which to access this information. There have been attempts to host, hold and/or signpost (We Make Moray, IGNITE Youth Arts, Culture Cafe) but, these take time and capacity to make known, and take investment from others to populate.
- Active networks and collectives continue to be so due to resource and capacity. There are examples of previous connections ceasing due to a lack of finance, leadership or strategy i.e. Moray Place Partnership, Moray Heritage Connections.
- Networks and collectives tend to be thematic rather than geographical. Those that are place based are often region wide i.e. Economic Partnership, Moray Speyside, Enterprise Network.
- Moray is rich in both natural heritage sites and cultural destinations, from castles to landscape walks and village halls.
- Village halls are key facilities for small communities. They, in general, keep things local and affordable. However, many are run by small groups of volunteers and are reliant on good will from the communities they serve.
- Many groups exist across arts and heritage that are arguably not meeting their potential due to either a) no desire to grow b) no need to grow and/or c) no resource to grow.
- Reflecting sector conversations, the spreadsheet supports the notion of fragmentation across the cultural scene in Moray. It is quite fluid and is vulnerable to fluctuation depending on people, money and circumstance.

Conclusions to be drawn:

There are many synergies with previous conclusions but in addition:

- 13) There is a conversation to be had around maximising the facilities and resources that already exist in Moray, as a way to collectively construct a wider benefit to cultural quarter projects.**

KEY FINDINGS

Who is active across heritage and arts within the region?

The heritage museums and venues across Moray hold incredibly rich and diverse heritage collections, many of which hold the power and potential to create outstanding experiences for visitors. Elgin Museum is the only Accredited Museum in the region. Other points of significance are Elgin Cathedral, Spynie Palace, Brodie

Castle and The Moray Way. Thus, the National Trust for Scotland, Historic Environment Scotland and the Moray Way Association are key stakeholders in the heritage landscape across Moray.

From an arts framework, there are four distinct sub-sectors; third sector organisations, commercial businesses, community groups and sole traders. There is no evident connection between the four, as they are all fundamentally driven by different purpose. However, it could be argued that the arts are more fully developed than heritage in the region from an economic development and leadership perspective. Key players in the third sector context are Dance North Scotland, Findhorn Bay Arts, M:ADE, Moray Art Centre, and The Universal Hall. In a commercial context Hunted Cow Studios and North Port Studios are primary players. Community groups and sole traders are many, across art forms and areas.

From a wider cultural perspective key organisations would include Elgin Town Hall for the Community, Johnstons of Elgin, Moray Speyside, and The Village Hall Association. Education stakeholders include Moray UHI, Lossie Entertainment Academy and Out of The Darkness Theatre Company.

How are those identified staffed, structured, and operational?

The heritage sector in Moray is almost entirely structured, staffed and operated by volunteers. Elgin Museum is the only Accredited Museum in Moray but due to financial restraints, currently relies on professional heritage support and advice from a Museum Mentor from out with the area. Moray Council has a Heritage Officer but they are exclusively aligned to the Council's Libraries & Archives Service and do not have a role in supporting the independent heritage sector in Moray. Whilst some heritage organisations benefit from volunteer knowledge or experience, there is currently no general access to professional heritage support. Most of the heritage venues in Moray are charities (either Registered Charities or SCIOs) and operate on a micro level, managing their opening hours based on volunteer numbers and capacity rather than with any strategic focus.

The arts sector in Moray, as noted above, is fragmented in nature across four sub-sectors. In short, third sector organisations tend to be structured as legal charities, governed by a board of trustees; depending on size, there may be salaried staff and/or freelance practitioners on fixed term contracts. Commercial businesses differ in structure as for-profit companies, but mirror approaches to staffing having a mix of salaried and/or freelance practitioners. This is the blueprint within the creative industries. Community groups tend to be volunteer run, with memberships and/or leadership teams in place to drive activity. There is currently no access to support or provision for the arts within Moray Council, with the development team cut in 2013 and never replaced. Any engagement with heritage, arts and the wider cultural agenda is now embedded within the Economic Development Team.

What activity do those identified currently provide?

The heritage venues identified in the Resource database are responsible for caring for, and making accessible, the majority of tangible heritage across Moray. They run and manage a range of venue types, often buildings with an additional heritage listing. Most are open seasonally and the degree of access is usually defined by volunteer 'front-of-house' capacity. Elgin Museum and The Cabrach Trust excepted, none of the museums are undertaking any externally funded heritage funded projects and there are no partnership projects between museums.

The arts provision, in relation to community benefit and access, tends to sit with third sector and community groups. Thus, activity is often fully funded or heavily subsidised via grant funding and/or income generation efforts i.e. ticket sales from shows. It could be argued that performance-based provision is more consistent, coming in the form of theatre groups, music development, dance classes/studios and local choirs. Visual and digital arts are often offered on a project-funded basis only, with an evident need and demand for regular classes at all levels.

Where do key challenges, developments and trends reveal themselves to be?

The overarching feedback from consultation showed that Covid has further impacted on the 'fragmentary heritage landscape' identified by Culture Radar's Report in 2020. There is a desire for space for heritage organisations to come together to network and share resources and knowledge but there is no capacity within the sector to make this happen. The sector's almost complete reliance on volunteers means that organisations are focused on their own survival and do not have the time or resources to support anything additional i.e. managing any kind of forum or network similar to Moray Heritage Connections. This lack of any coalescence between heritage venues and organisations means that significant opportunities are being lost to develop the heritage assets and facilities that could be aligned to economic development. Moray Heritage Connections has not reformed since the Covid pandemic (although does still have an operational FB page), resulting in the removal of the only networking structure for heritage in Moray. It is evident that the running of Moray Heritage Connections was reliant on the support that was given by Moray Council and it was under-estimated how much this was worth in terms of providing even a minimal network for communication and information sharing.

The arts sector (talking predominantly about third sector and community groups) all face the same primary challenge of capacity and resources to run, grow and reach their full potential. Funding streams are vulnerable with budgets decreasing and competition increasing, and there is a widening need to meet more strategic priorities across equalities, fair work and the environment through the activity that is delivered, which in turn means doing more with less. There have been key developments and trends across enhanced finance for community/participatory working in response to covid recovery, but these pots of money don't have longevity and as such sustainability of such activity will be impacted. The arts are becoming more aware of how to translate outcomes to different frameworks, from community wealth building to raising attainment and this could see a shift in the types of projects being introduced moving forward. These opportunities, however, have allowed for local partnerships to bloom and there is an awareness, acceptance, and ambition to develop this moving forward. Grassroots agency has come to the fore in recent years, because of depleted council support, with new mechanisms being driven and constructed from individual efforts.

What facilities, venues and meeting spaces are accessed and what is missing locally?

Consultation for this report highlights that whilst the operational heritage venues in Moray are 'just about managing', there is no cohesive sense of 'place' for heritage in Moray, either in terms of profile or internally in terms of creating an anchor or space for heritage organisations to work together with key strategic aims. This means that the many opportunities for partnership working are missed, and the huge potential for creating 'joined up' heritage and cultural experiences that are responsive to visitors' needs are not currently being investigated or developed. Whilst individual heritage organisations do not have the capacity to look further than their own aims, there is a recognition and desire to see more collaboration to benefit wider education & learning, tourism and enterprise in their own location.

As with heritage, the arts would benefit from a cohesive sense of 'place' - although there are facilities, venues and meeting spaces, nothing at the moment is seen to be fully fit for purpose or wholly appropriate to context and/or art form. There is exhibition space at Elgin Library, Moray School of Art and Moray Art Centre - but nothing that drives, hosts or curates' high quality contemporary art shows. There is

performance space in village halls, The Universal Hall, and Elgin Town Hall - but nothing equipped to a standard that allows large scale performances, or affordable enough, to present to a greater level of ambition. There are dance studios but very little are available and affordable with sprung floors and mirrored walls. There is currently no publicly accessible digital suite or recording studio within Moray - both of which could be capitalised on in the context of health and wellbeing and income generation. It could be argued that provision across art forms has hit a ceiling in terms of the market's they reach and that with significant improvement in such spaces, there would be a new door opened for encouraging greater local engagement and higher inward engagement across cultural activity.

How are those identified supported more widely and what provision are they currently tied into with regards networking, promotion and ideas sharing?

Heritage organisations across Moray currently have access to membership of Museums & Heritage Highland but only Elgin Museum have been members. The new Northeast of Scotland Heritage Network is open to museums and heritage organisations across Moray but has little representation from them currently. With the loss of Moray Heritage Connections, there is currently little networking, promotion or ideas sharing across heritage, but the potential is there if capacity is given to support this.

The arts heavily self-facilitate networking, promotion and ideas sharing. From Culture Cafe to the Culture Collective projects, leaders, artists and partners are communicating well. There are semi-regular events i.e. conferences, Degree Show, learning exchanges, that help foster relationships - however - there is no one hold or coordinator that ensures cohesion, consistency or added-value connection. There is also a culture of the same people turning up to and/or generating these opportunities, so there is work to do with regards inclusion and ensuring those that want to be involved and/or represented have the option and ability to do so.

CONSIDERATIONS: NEXT STEPS

Conclusions:
1) Proven record of arts and heritage as an economic driver. This needs to be recognised, valued and utilised moving forward.
2) Collaboration and partnership is key for raising the profile, deepening engagement and improving future sustainability of the arts and heritage sectors.
3) Strategic work to be done with regards generating an operational plan for culture, inc. a brand identity. 'A Sustainable Future for Heritage & Culture in Moray' already outlines findings that remain relevant to our current context; these should be drawn upon for future vision.
4) There is a benefit to approaching arts and heritage under the combined banner of 'culture.'
5) Need and demand suggest that additional human resources, and accompanying mechanisms, are required for cohesive and effective sectoral growth.
6) The relationship between Moray Council and external partners needs to be carefully considered moving forward. There is a long standing history with regards to statutory services and lack of investment across arts and heritage, therefore should be sensitively handled to ensure a mutual understanding, respect, value and purpose is achieved.
7) A core body/structure would be strategically impactful for cultural growth and potential.
8) Pre-delivery financial resources have a direct impact on the success and longevity of capital projects; development money allows for momentum, community buy-in, sector voices to be heard and listened to and opportunities to build collective investment in a future vision.
9) The scale and size of our geography, aligned with the volume of grassroots activity and community-led/supported provision and Moray Council/Government investment, creates a strong triangulation and significant opportunity for Moray to 'level-up' in terms of our 'cultural narrative'.
10) There is a conversation to be had around maximising the facilities and resources that already exist in Moray, as a way to collectively construct a wider benefit to cultural quarter projects.

APPENDICES

Appendix 1

Heritage Sector Consultation

George Alexander	Forres Heritage Trust (Nelson Tower & Forres Tolbooth)
Jim Kilpatrick	Fochabers Folk Museum & Heritage Centre
Tim Negus	Findhorn Ice House & Heritage Centre
Bill Dalgarno	Elgin Museum & Moray Heritage Connections
Gordon Scott	Friends of Falconer Museum
Sam Dowdall	The Cabrach Trust
Bruce Mann	North East of Scotland Heritage Network
Shona Elliott	Jacob O'Sullivan Museums Galleries Scotland
Kirsty Conti	Moray Council
	Moray Motor Museum
	Speyside Cooperage
	Knockando Woolen Mill