The Bournemouth International Arts Festival

Evidence from case studies and other sources

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Background

The Market Research Group at Bournemouth University has provided support for the development of outline proposals for a major international arts festival, to be launched during 2011. Following a meeting with representatives of the Bournemouth Arts and Culture Board in March 2009, a set of objectives were agreed for a limited research project, reviewing existing data and obtaining feedback from representatives of successful festivals in the United Kingdom and overseas where appropriate. Bournemouth University has agreed to support this research with time and resources in the absence of a budget and because of the need for prompt action, in order to facilitate a planning process toward 2011.

Bournemouth has been successful in developing a unique ‘brand’ presence in the tourism and leisure sector. Bournemouth has drawn on its natural resources and created a series of distinctive products, which blend traditional aspects of the seaside, appealing to traditional markets, a strong conference and events business and a vibrant night time economy. The expansion of the ‘creative industry’ in Bournemouth represents a further challenge that can reposition Bournemouth’s cultural profile, appealing to new markets, expanding existing markets, improving the quality of community life and attracting both direct investment in the festival events and indirect investment as Bournemouth’s appeal becomes more comprehensive.

The data and information used in this report has been extracted from studies conducted between 2004-2008, a period of relative economic stability and predictability. Since the economic downturn, during the latter part of 2008, the leisure and tourism sector along with the wider economy has been the subject of exceptional challenges. While there is evidence that leisure spending and domestic tourism may have experienced growth during 2009 there is uncertainty about the longer term market trends, also the return of confidence for private and public sector investment remains elusive.

Summary

The development of an international arts festival in Bournemouth should be seen as an expansion of the borough's economic portfolio through the creative industries, providing substantial economic and quality of life benefits for Bournemouth residents.

In order to engage public support, the contribution of the arts to Bournemouth's economy and quality of life should be further publicised and plans for future development explained, at an early stage.

There are three principal business options with associated investment implications. These may be viewed as development phases, commencing with Option 1 in 2011, with subsequent development to Option 3 over a period of 4-5 years.

1. Option 1 – Development of one major international arts event with a duration of at least 7 days, to be programmed during May/June or possibly early July. The creation and management of the event could be directed by a specialist creative director with the support of the existing network of local creative management; perhaps utilising the new management arrangements for the Pavilion thus reflecting the 'Brighton model.'
2. Option 2 – Development of a major international arts event and the 'repackaging' of existing smaller events as part of the Bournemouth arts festival programme. This would probably require the recruitment of a specialist creative director working with a network of local creative management support.
3. Option 3 - Development of a significant programme of arts events including at least three major annual events supported by up to nine smaller events as part of a significant brand offer. This would require the recruitment of a specialist creative director plus support staff (especially marketing) and a managed organisation of creative support.

Repositioning Bournemouth's destination brand image requires either:

- A substantial single event 'The Bournemouth International Arts Festival' which acts as an introduction to a series of arts events running throughout the year but not necessarily branded as part of the festival or
- A programme of arts events perhaps 'packaged' as the Bournemouth International Arts Festival and distinctive from the extensive events programme already offered.

A single event or programme of separate events may not have the required impact to reposition the Bournemouth brand or have sufficient appeal for sponsors.

The Bournemouth International Arts Festival should complement the main visitor season; offering a significant programme over at least 7 days during May/June/early July, with smaller events during the peak demand periods,

during July and August. At least 10-12 arts events should be offered during 2011. The smaller events during year one could be 'repackaged' events that are either already offered such as the comedy shows or tried and tested events such as the 'Inside Out' format.

Bournemouth already has world class strengths in the fields of classical music through the Bournemouth Symphony Orchestra, dance represented by Dance South West, film, animation, fashion design and digital media through the two universities. These art forms should provide key themes for the development of the festival programme.

The Bournemouth International Arts Festival, which initiates the arts festival season, should combine popular art forms that have proven successful with other festivals, to include classical music, theatre and dance. Bournemouth is in a unique position to lead the festival with its own world renowned Bournemouth Symphony Orchestra, combined with dance companies of similar international stature that can further raise the profile of Bournemouth as a centre for dance. The notions of spectacle and 'extraordinariness' are no longer necessarily based exclusively on the attraction of talent from outside (the great performers, artists, film-makers etc), but on an integration between global and the local creativity.

Bournemouth has a unique heritage, a product of the dynamism of the Victorians, a resort influenced by the spirituality of the 'Oxford Movement' and set within a marine seascape of exceptional beauty and geological interest. The Bournemouth festivals should draw upon the youth and dynamism of the borough drawing inspiration and developing themes from the time of its inception to the present.

Themes associated with Bournemouth and the area could include the literary/gothic (Mary Shelley) and extended to include the UK fascination with murder/mystery (Cornwell/Le Carre), children's story telling (Enid Blyton, Meade Falkner). Traditional seaside entertainments such as comedy and carnival should also be included in the programme.

The visual arts are relatively under-represented in Bournemouth, apart from the relatively small exhibition space at the two universities, The Russell Coates Museum and small independent galleries. There is probably a need for a sub committee of the Arts and Culture Board, specifically for the development of the visual arts in Bournemouth including gallery space, outdoor sculptures and other art forms (screens for animation and digital media). The sub board should include direction from the expertise resident in the two universities. The brief of the sub committee should include the planning for a major architectural town centre 'hub' for the visual arts.

The Bournemouth festivals should extend into the fabric of the borough using a range of venues including street performances, pubs, clubs and other places of public entertainment, the parks and more formal venues.

At an early stage in the planning of the festival programme links with the media should be developed, to evaluate the extent to which events can be televised and networked in the United Kingdom and overseas. This will be an important part of future discussions with potential sponsors.

The venues for open air performances should be evaluated for the potential to install temporary or permanent facilities that can provide for the visual and acoustic needs of major artistic performances.

As part of the strategy to expand the creative industries in Bournemouth new works should be commissioned in the various artistic forms for inclusion in the festival programme.

Visitors to arts festivals are generally younger and have a much higher economic impact than other tourists, even other cultural tourists. Comparison with the figures for the UK Tourism Survey (UKTS) seems to demonstrate that visitors to festivals spend more and stay longer than other cultural tourists, ultimately making a very significant contribution to the local economy.

When measuring the economic impact of any cultural activity, in most instances, the greatest part of the impact is made by audiences' spending money on hospitality, accommodation, retail and travel into the economy of a specific geographic location. As an example, in 2004, Brighton Festival generated £22 within the city's economy for every £1 spent on tickets and thereby accounted for over £20m within the local economy alone.

Estimates of spending by visitors attending the Brighton festivals in 2004, including money spent on tickets (£1million) , meals, drinks, accommodation, shopping, taxis, amounted to, £20 million in 2004. Local businesses invested over £400K in the Festival Open Houses, artists received over £840K. Public Sector support of £1.1 million brought a return on investment of nearly £20 million into the City's economy. The Manchester International Festival is projected to generate £34m for Manchester in return for £3.65m public investment. Newcastle is making use of festivals as part of its tourism strategy although investment by the RDA is to be reduced for 2009-2010.

For Bournemouth to offer an arts festival programme from 2011 it is estimated that Bournemouth Borough Council would be required to commit at least £2.5 million per annum for a four year programme with a further £2-3 million per annum from other funding sources (total of £5mn per annum, year one may require a higher commitment of up to 75% of cost by Bournemouth Borough Council). The returns could potentially be an additional £20-£30 million pounds per annum to the local economy accrued mainly during the shoulder and low periods of the tourist season between September and June.

Case studies of festival cities indicate an approximate budget threshold for 'culture' of around 4% of the overall municipal budget per annum. Amsterdam, Montreal and San Francisco have cultural budgets of approximately 4%. It was proposed in 2007 that Edinburgh City Council which had a budget of around 2.8% of budget should work towards achieving a 4% threshold for

"Culture" to reflect comparator cities. Bournemouth Council's total budget for 2008/09 was £432.6 million.
Income sources for established festivals (BAFA) include – ticket sales 34%, trusts and foundations 11%, businesses 12%, individuals 3%, additional sales 4%, advertising 2%, membership fees 1%, interest on investments, 0.5%, arts councils 12%, national lottery 1%, county councils 13%, borough or district councils 2%. Manchester city council met 75% of the festival costs in the first year.

The breakdown of expenditure for festivals investing over £1mn is approximately – staff costs 26%, overheads 12%, production/exhibition costs 54%, marketing 8% and other costs 5%.

Marketing activity should be coordinated with Bournemouth's tourism strategy and marketed with the DMO.

Aim and objectives

To evaluate the success factors for a major international arts festival to be held in Bournemouth.

Objectives

This proposal and feasibility study should:

1. Identify the key components and timing of an international arts festival, to have substantial appeal for a culturally orientated audience.

2. Evaluate the infrastructure supporting the festival including transport links, accommodation and venues.

3. Evaluate the likely economic and community impact and effect on tourism to Bournemouth.

4. Evaluate current activity, strengths, aspirations and potential of current delivery in Bournemouth and how it maps regionally, nationally and internationally with what is already on offer.

5. Propose a means of obtaining feedback and evaluation to provide a basis for reviewing and modifying the festival.

6. Propose a range of options or models and business models for the Arts & Culture Board to consider.

Methodology

This report has been compiled from a range of existing reports and data, combined with feedback from representatives of major international festivals, notably those in Edinburgh, Manchester and San Francisco and representative organisations, such as the British Arts Festival Association.

Members of the Bournemouth Arts and Culture Board have provided important contributions to the development of the proposals described in the report.

A number of case studies have been used from which conclusions have been drawn and these have provided many of the themes for discussion with those managing and organising major international festivals. Major sections of these case studies and other materials have been extracted from a number of key reports, previously prepared by different agencies for client organisations involved in festival management.

Introduction

Festivals have become a major growth market across different continents; and a major component of this market is the expansion of arts festivals that span different or multiple artistic disciplines, celebrate local customs and history, or mark special occasions and events. Although there is no verifiable source that lists all such festivals that take place world-wide, a review of national tourist organization websites indicates that there are more than 10,000 cultural festivals, of which half can demonstrate some degree of international recognition.

In the context of urban development, from the early 1980's the growth of festivals has been linked to the economic restructuring of cities, inter-city competitiveness and the drive to develop cities as large-scale platforms for the development and consumption of 'creative experience'. Although the key period of the development of international cultural festivals in Europe was following the Second World War, a large number of cities around the World continue to create international festivals and events as important catalysts for renewal and image-making. These aims are linked with an increasing pre-occupation with the realisable impact of festivals in hard economic terms and in certain cities, also in relation to softer social inclusion and education objectives.

Enhanced means of communication, the ease of travel, the dramatic rise of tourism in domestic and international markets and improved standards of education have all contributed to the festival boom. Festivals are no longer seen as matters of fashion, offering 'background conditions' for cities, or as playgrounds for culturally-minded minority publics; increasingly festivals have become critical elements of broad and integrated local, regional and national development strategies.

A review of national tourist organisation information indicates an increase of approximately 25% over the last ten years in the number of arts festivals taking place. This indicates the seriousness with which cities are now actively competing to attract, sustain and expand their roles in hosting and promoting cultural events of all types. There are increasingly high levels of investment in both hardware (infrastructure) and software (people, talent and projects). At its simplest, the western inspired cultural imperative, encouraged by mass travel has resulted in cities across the globe becoming homogenised. Festivals and more particularly a festival programme is one of the mechanisms by which cities distinguish themselves and move from commodity to brand, in order to attract and retain inward investment, tourism and a skilled work-force. There is little evidence for the current economic downturn adversely affecting the number of festivals or audience attendance during 2009, however the long planning cycle for large events, means that the impact may not be felt for up to two years, as public finances and private sponsorship is compromised.

Festival development is often benchmarked against Edinburgh, one of the most successful and longstanding festival venues, copying some of its models, headhunting talent, creating rival events with large amounts of public and private 'venture capital,' re-branding their cities as leaders in the competitive realm of the creative and experience economy, and allocating substantial funds for large-scale international marketing to help guarantee the success of re-positioning efforts.

Successful festivals that can be sustained over time (say, more than ten years) tend to be those that are able to respond to the particular and changing contexts of the cities in which they operate. This focus on context is beginning to prompt a ‘reconsideration’ of the value of festivals primarily as tools for economic regeneration and platforms for city marketing to a broader view where festivals simultaneously promote and help achieve significant cultural and social goals. One only needs to look at the recent successful bids of Liverpool Capital of Culture 2008 or the London Olympics in 2012 to recognize the strength of commitment to multiple (not all economic) objectives and agendas. This broader canvas of expectation applies as well to existing cultural festivals and is creating complexities for both large and smaller festivals that are struggling to meet overlapping and often conflicting priorities of different political bodies, funders, sponsors, diverse audiences and artists, and often doing so within declining public resources and limited development.

In spite of increasing tendencies to respond to the local contexts in which festivals take place, there is an equal drive to position more and more festivals as ‘international’, as symbols of their standing and eminence. This is leading to an increase in scale and sophistication of a developing competitive international festivals’ market-place. A global festival infrastructure has been created, with specialised networks, venues, presenters, producers, critics and audiences.

There are informal (cultural) league tables assessing the standing of different festivals around the world. At the ‘top’ of such international cultural leagues are mainly festivals that are creating their own artistic capital, measured in terms of new productions, exclusive projects (even if in collaboration with associated groups of co producers), attracting culturally diverse publics, developing newly built or reconstructed performing and exhibition venues, and making ‘exceptional’ discoveries of combinations of talent that are unexpected and unpredictable. For cultural festivals of international standing, such league ratings are based not on the scale of visitors, but on critical reaction from informed and specialist groups of critics and opinion formers. Success is generated through an alchemy that combines enlightened vision, a strong creative process, effective leadership and management, astute communication and marketing, and ‘risk-taking’ impulses.

Festivals that enjoy long term critical and popular success are those that invest in their own development and in their relationship to their community, that go ‘that little bit further’ than their competitors. When the competition begins to reproduce the success and starts to catch up the leading festivals use their inventive and risk taking capabilities to move up or across in order to set a new standard. A similar pattern exists in all creative sectors where development and innovation capacity (not only sales) become critical factors of sustained achievement.

Richard Wagner referred to *“the extraordinary event, in an extraordinary place at an extraordinary time”;* leading festivals share such characteristics. This ‘extraordinariness’ is no longer based exclusively on the attraction of talent from outside (the great performers, artists, film-makers etc), but on an integration between global and the local creativity, and on the imaginative relationships between ‘foreign presence’ and the ‘local cultural ecology and place’. The current and certainly next generation of festival directors and organisers will grapple with the subtlety of ensuring such synergies as a condition of making cultural festivals ‘extraordinary’.

However, this is a relatively recent revelation in the traditional world of cultural festivals. The current tools of evaluation are still pre-occupied primarily with the quantifiable and the economic. Despite the developing prominence of issues that inform the debate about social inclusion and multiculturalism, when it comes down to the key criteria against which to assess large festivals, the combined attributes of linking the local with international contexts, discovery, scholarship, risk, invention, imagination and integration remain under-valued in terms of arguments for increased support. These attributes should be critical measures in the overall evaluation of the festival offer.

International trends in festival development

When examining the expansion of festivals internationally it is possible to discern the following trends:

- There is a shift from viewing festivals as ‘single attractions’ to the development of the ‘culture of cities’ (including its festivals) as an integrated ‘product’ (usually at certain times of the year), linked to broad destination marketing strategies;
- Festivals are often viewed from one or a combination of perspectives, often summarised as ‘arts-focused’, ‘urban development focused’ and ‘liveable cities focused’;
- There is an increase in highly specialised festival producers and managements and global circuits; There is a steady growth of one-off ‘cultural blockbusters’ (Cultural Capitals, themed years, special expos and exhibitions, etc), in parallel with newly established recurring festivals; and with some notable exceptions (certain UK cities included), proportions of public funding for festivals are reducing internationally when compared to other sources of income (sponsorship, ticket sales, merchandising/catering income, etc.).

Festival success factors

From the various case studies examined and the conclusions of the 'Thundering Hooves Report' prepared by the AEA consultancy for Edinburgh, it is clear that there is no guaranteed template for a successful leading festival city that can be sustained over time.

However, there are a number of apparent critical success factors and the research suggests that a leading festival city will be able to demonstrate the following attributes:

Long-term Planning and Strategy: Festivals development should be considered in minimum blocks of five years and set within a longer-term strategic context of a city's long-term development and competitiveness.

Importance of context: The historical, physical, social and cultural context of a city is a major source of the uniqueness of each festival.

Distinctiveness of location: The location must be 'attractive' in terms of beauty, geology or distinctiveness.

Appropriate Timing: The dates of key festivals must be set to enable both strong programming and to attract a required and expanding number of visitors (both local and tourists).

Diversity of Cultural Ecology: The city should offer a wide range and variety of year-round cultural activities, and the festivals should be well-integrated into this ecology through networks, relationships and projects at local, regional and national levels. The festivals should be an integral part of their host cities' cultural life, with deep relationships to their local communities, and not have the feel of being grafted onto them.

Coordinated Action: Opportunities for collaborative initiatives should be explored and maximised, making linkages with and across different facets of the cultural systems at play.

Invading and Interacting with the City: Events should be 'audience friendly' and 'safe', but at the same time energizing and continually surprising, creating a 'spirit of excitement' or 'buzz'.

Investing in Quality over Quantity: Success depends on achieving and sustaining a consistent international quality threshold for all festivals, regardless of the number of festivals offered. Careful impact assessment of each new festival to be added to an existing mix should be a requirement. This is more a question of understanding the implications (both positive and negative) of new entrants rather than creating a cartel of existing players.

Talented and Experienced Direction: Visionary artistic and managerial leadership are essential and conditions for recruitment, selection, retention and succession need to be carefully considered to attract the best talent and to offer platforms and solid operational frameworks that can support the creativity that such leadership inspires.

Focused and Innovative Programming: The cultural programmes must be purposefully directed and focused continually innovating; investment in innovation is a prerequisite of sustainability.

Effective Marketing and Branding: Marketing and branding should operate within a coordinated strategy on several integrated dimensions, with clear responsibilities agreed between partners and adequate resourcing taking into account the competitive environment.

Political will matched by strong leadership and political independence: Sustained policy-driven support by funders should be linked to strong leadership offered by the governing structures. Members of governing bodies should have appropriate expertise and have an appropriate balance of skills, interests and contacts to support a festival's objectives. The programme should not be influenced by political interests and the operational structures should be autonomous, characterised by strong governance. Political and operational alliances must work toward commonly agreed goals.

Wide Public Engagement: There is a balance between the involvement and engagement of resident and visiting publics, with the former being the dominant sector.

Adequate Resources: The combined sources of finance must be sufficient to enable appropriate levels of quality, volume and breadth of festival activity in a city with sufficient opportunity for new development and risk-taking.

Many Financial Stakeholders: There needs to be an appropriate balance of resources offered by different stakeholders from both public and private sectors, and a means of 'brokering' the particular interests and needs of each. It is often the public sector that must take the responsibility to coordinate and facilitate discussions, which need to involve players at all levels (local, regional, national and international).

The Public Sector has a Key Role to Play: Investment by the public sector should offer a measure of confidence in each festival and to the festivals' system as a whole, to help lever other forms of support and partnership development. The public sector has a prime responsibility for supporting the development of festival infrastructure, in the delivery of publicly-managed or public-private partnership projects, and in the setting of priorities and offering incentives to the private sector. In addition, the public sector should take the major responsibility for ensuring longer term impacts of festivals and their sustainable benefits, based on end-user research and engagement, are monitored and understood.

Developed Festival Infrastructure for All Visiting Publics: This includes high quality information, accommodation, transport and visitor services when compared to competitors.

Excellent Facilities: Provision of ‘world-class’ venues, outdoor event spaces and other festival infrastructure to accommodate ‘world-class’ programmes, including the need for continuous innovative use of existing and new indoor and outdoor spaces.

Wide Media Support: World-wide press and media must be attracted because of the quality and stature of the events and be sufficiently motivated to ensure that the coverage is extensive and prominent. Indeed the ability to attract national and international press coverage is critical to success. The prospect of press coverage enables a festival to secure performers at lower rates than would otherwise be the case, affecting benignly the underlying business model. Press coverage tends, given scarce resources (and inertia), to focus disproportionately on the top one or two events. A failure to secure press coverage has a correspondingly adverse impact on both the ability to attract and retain performers at competitive rates and, because of the obvious benefits of free publicity, the level of effective demand.

Coordinated Processes of Monitoring and Evaluation: All interested parties should agree the criteria, priorities and processes for monitoring and evaluation of each festival and festivals as a whole. A ‘toolkit’ should be devised that balances economic, social and cultural factors with innovation and management effectiveness. The primary aim of monitoring and evaluation should be to promote a learning environment that encourages continuous improvement, with the acknowledgement of successes and achievements as well as problems and mistakes of the festivals and the funders. Financial control systems should be in place to help negate adverse cost variances, as well as business planning that uses options appraisals, scenario planning and financial modelling techniques.

Bournemouth’s Festival Infrastructure

Bournemouth has an enviable geographical coastal position, located as a ‘gateway’ to the South West, with the benefits that accrue from a sophisticated urban development adjacent to exceptional countryside and the eastern end of the Jurassic Coast.

The Bournemouth population is approximately 163,000 of which 62% are of working age compared to 60% for the South West and 62% for England and Wales. 22% of the population are of retirement age compared to 19% in England and Wales. Thus a perception that Bournemouth has a predominantly aged population is misplaced.

Population estimates 2007
Source: ONS 2007

	Persons('000s)	% Change on previous year	Males ('000s)	Females ('000s)
Bournemouth	163.2	1.2	79.6	83.6
Poole	138.1	0.9	66.3	71.8
Dorset	406.8	0.9	197.3	209.6
South West	5,178.0	1.1	2,536.2	2,641.8
England & Wales	54,072.0	0.6	26,568.5	27,503.5

The resident population is further augmented (Approximately 25,000+) by the student population attending the universities (Bournemouth University and The Arts University College at Bournemouth), Bournemouth College and the language schools (approximately 35 schools in the area). This section of the population has grown significantly in recent years enhancing the youthful and cosmopolitan aspect of the borough.

While Bournemouth has unquestionable advantages in terms of prosperity and location, it was ranked 95th out of 354 local authorities in the ODPM indices of deprivation in 2006 further justifying the need for continued investment in the economy and infrastructure development.

The transport links serving the borough are excellent and compare well with other festival venues such as Brighton, Manchester and Edinburgh. Bournemouth Airport is small but growing and currently engaged in a redevelopment programme costing in the region of £45mn. Passengers handled in 2007 rose by 13% on previous years to 1,083,446 and in November 2008 was ranked best airport in the United Kingdom and 3rd best after Singapore and Hong Kong International airports. Passenger traffic is predominately leisure motivated. There are good links from the airport into Bournemouth town centre and more frequent bus services are planned as part of the redevelopment programme.

Southampton airport provides another important international link, 30miles to the East of Bournemouth with a relatively straightforward train link of about 30 minutes. There are good motorway connections between the two conurbations but these are mitigated at peak times by congestion.

Motorway connections to London via the M3 are good with drive times from the capital of between 2 -2.5hrs, although traffic congestion can add significantly to the journey time.

Bournemouth's internal routes and routes to the surrounding area are well served by a modern bus fleet and train stops within the conurbation.

Ferries sail from neighbouring Poole to Normandy and the Channel Islands, while most of the traffic is UK outgoing the links for an international festival are important for future development.

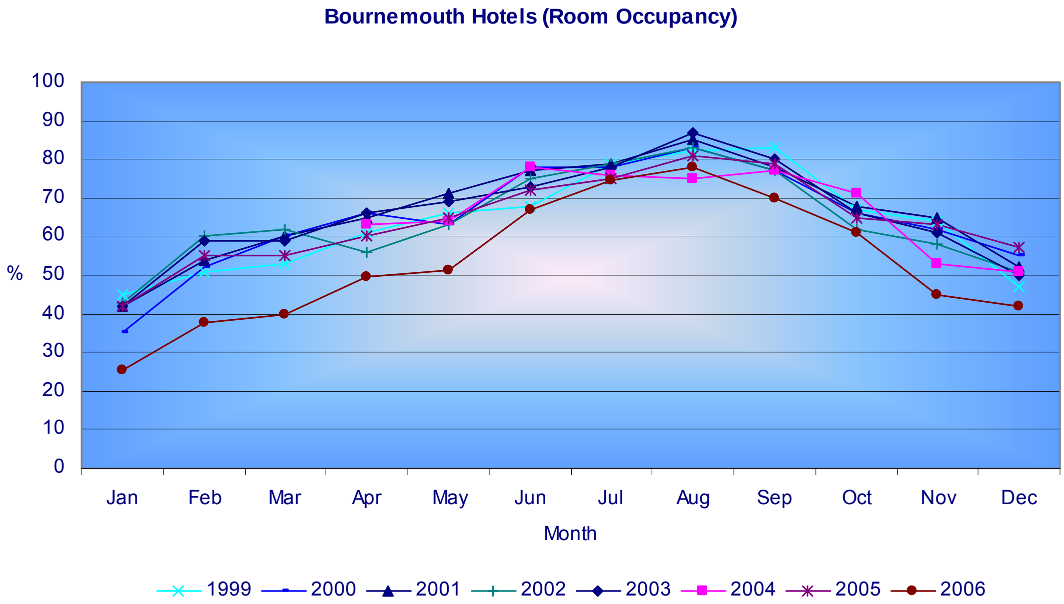
The accommodation stock in Bournemouth and Poole is described in the table below. The hotel sector is the most significant accounting for 41% of bed spaces with the majority of establishments located in Bournemouth (65%). The constraints imposed by the lack of 4 and five star hotel accommodation have been recognised in the Poole and Bournemouth Strategic Framework and Action Plan (2008-10).

Accommodation stock in Bournemouth and Poole

Establishment type	No. of establishments	Bedspaces/units/pitches	Bedspaces	% inspected	Average rating
Hotel	161	14463	14463	53	2.3
Guesthouse/B&B	295	5667	5667	28	3.1
Self catering	224	577	2308	46	
Touring					
Caravans/tents	2	104	416	50	5
Static vans	2	290	1160	100	5
Holiday Centres	1	1250	5000	100	5
Group	0				
Accommodation	1	67	67		
Marinas	6	1502	6008		
TOTAL	692	23920	35089		

Source: Volume and Value of Tourism 2005

Predictably the occupancy rates for Bournemouth hotels (1999 -2006) indicate that there is very little high season (Mid July through August) capacity and that May/June and September/October offer the most scope for the development of a festival programme attracting substantial numbers of people from outside of the region.



Venues

The principal venues currently available within the borough are described below. The capacity for the open air venues is dependent upon the production facilities required for different events and health and safety assessments. The weather during May and June should provide sufficient scope for outdoor events in the parks and football stadium. The development of a more permanent 'Hollywood Bowl' (http://www.hollywoodbowl.com/about/bowl) arrangement may be considered as an option for the future, providing an acoustic summer alternative to The Lighthouse in Poole.

While the principal venues provide a focal point for key festival events, in order to derive maximum social and financial benefit from the festival programmes and create a memorable festival atmosphere, the streets and squares of Bournemouth including Boscombe, pubs and clubs, public building and redundant buildings, should all be considered within the portfolio of potential festival venues particularly fringe events. In fact the dispersion of the festival into these venues is critical for the overall success of the festival and creative strategy. The creative collective 'Shunt' is a good example of small scale productions that use abandoned or derelict buildings for performances that can extend the creative offer beyond formal venues to reach a wider audience.

Venues for the visual as opposed to performing arts are more difficult to identify. With the development of the Pavilion as a venue for dance perhaps urgent consideration should be given to find suitable, central accommodation for the visual and 'plastic' arts including animation and digital media which is becoming an important feature of the local creative economy driven significantly by the universities. A sub committee of the Arts and Culture Board could occupy an important role in the development of this important aspect of Bournemouth's embryonic creative industry.

In addition to ‘street art’ including commissioned sculptures for the parks and gardens; initiatives such as ‘2nd Birthday’ a charity which utilises disused shops and empty buildings for the exhibition of the visual arts, should be encouraged and developed to provide a permanent creative narrative for the borough.

	Capacity
Bournemouth Pavilion	
Theatre	1458
Ballroom	
Theatre Style	650
Banquet	650
Reception	900
Pavilion Dance	
Studio Theatre	180-220
Dance studios	3
2 Terrace outdoor performance areas	
Bournemouth BIC	
Windsor Hall	
Concert standing	6500
Theatre Style	4200
Banquet	1100
Reception	3500
Tregonwell Hall	
Concert standing	1000
Theatre Style	1100
Banquet	464
Reception	1500
Purbeck Hall	
Theatre Style	1700
Banquet	900
Reception	2500
Solent Hall	
Concert standing	2000
Theatre Style	1100
Banquet	650
Reception	2000
Pier Theatre	
Open Air	
Bournemouth football ground	9600 (seated)
Kings Park	
Queens Park	
Bournemouth gardens	

The development of an international festival fits well within the proposals for the Town Centre Master Vision, notably,

Towards 2015 (The Regional Tourism Strategy) was published in January 2005 and sets out the strategic vision and priorities for the South West region for the next ten years. The three main strategic aims of 'Towards 2015' are:

- **Driving Up Quality -** South West England does not want to become, a 'cheap' destination. By driving up quality and the competitiveness of businesses in the region the aim is to increase value and respond to the changing demands of existing and new visitors.

- **Delivering Truly Sustainable Tourism -** through meeting the needs of the visitor, industry and community within environmental limits.

- **Creating Superior Destination Management Arrangements** - for the strategy to be effective there is a need to rationalise the wide variety of methods and structures involved in tourism support and promotion. The visitor experience should ultimately be delivered at 'destination level' and it is on this experience that visitors base their decisions on whether or not they will return.

Specific vision projects have emerged and the Area Action Plan will help develop the vision further and enable planning policy to evolve. The Vision Board has established clear goals:

- A world-class Dance Centre is being created in Bournemouth Pavilion
- The Town Centre Master Vision will bring significant improvements to Bournemouth's public spaces - making the town easier and more pleasant to experience on foot
- Pier Approach, near the sea front, will be transformed through better landscaping, removal of clutter and work to the existing flyover
- Views into the award winning Victorian gardens will be improved and signage and landscaping throughout the town revamped to make it easier to navigate the town
- The town's main shopping streets will be improved by widening pavements, changing the road network, encouraging distinct retail zones and improving car parking facilities for shoppers
- An all-weather cafe culture will be promoted to increase town centre vibrancy
- A programme of events and new attractions will boost the town's visitor appeal and place Bournemouth on the festival circuit
- A number of prime sites including existing surface car parks will be earmarked for the development of attractions, homes and offices
- Demand for homes and jobs will be met by building mixed-use developments including new homes and affordable work spaces in the town centre. Business incubator units will give support to graduates wishing to stay to work in Bournemouth and a growing

employment quarter will attract new business, retain existing business and encourage a more diverse and skilled workforce
- Town centre congestion will be tackled through changes to the road network and improved public transport
- Environmental good practice will be at the heart of all development, this and cleaner public transport will help reduce Bournemouth's carbon footprint.

Bournemouth – The portfolio of cultural events

Bournemouth already has an extensive programme of cultural/arts events, drawing on local and regional strengths, as well as hosting national and international performers. The programme is varied and extensive, ranging from the classical to the contemporary arts and demonstrates a resource of local talent and a receptive audience. The challenge is to develop the strengths of this local and regional resource, while appealing to a geographically wider audience, through further investment in the creative industries thus repositioning Bournemouth as a cultural centre.

The Bournemouth Symphony Orchestra (BSO) represents a singular strength with national and international reach, capable of attracting interest in the national media, which is of particular interest to potential sponsors and investors in the 'festival project.'

The lack of a permanent venue for the visual arts is a significant 'gap.' Such a venue could provide an enduring manifestation of Bournemouth's commitment to the 'creative industries' and provide an essential complement for the performing arts and festival culture. There are centres of excellence in the universities, in the artists 'quarter' of Boscombe and independent galleries in the conurbation, but there is possibly a requirement for a significant central architectural statement, which can provide a focus for the visual arts and the creative life of the borough. Conversion of part of the existing town hall or redevelopment of the Imax site could eventually provide the necessary iconic and practical representation of Bournemouth as a cultural centre.

Bournemouth has considerable strengths in its arts 'portfolio,' some of which could be more effectively harnessed to meet the borough's aims of raising its cultural profile and providing the necessary context for a 'Festival City'. The Arts University College has considerable resident expertise, a great deal of which is internationally recognised, across the spectrum of the arts, including acting, architecture, digital media, photography, fashion and fine art. The Arts University is already significantly linked with the global creative industry and can provide a unique dimension to the ambitions of the borough.

Bournemouth University has centres of excellence in corporate and media communications, media production and computer animation and has an in-house agency, SCAN which specialises in developing media arts. Launched in 2004, SCAN works in partnership with a broad range of individuals, groups and institutions nationally and internationally to commission innovative projects that cross and merge disciplines drawn from arts, media, humanities, science and technology. SCAN explores ideas, sites and tools showing the creative potential that media arts offer in our changing society. Collaborators have included John Hansard Gallery, Arts Catalyst, ArtSway, FACT, Cornerhouse, South Hill Park Arts Centre, Fabrica, Plymouth Arts Centre, I-DAT, ICA, Arnolfini and Science Museum London. The agency has worked on a number of regional festivals including Brighton Festival, andLiverpool, and Lovebytes Festival Sheffield.

It is suggested that a sub group of the Arts and Culture Board is formed specifically to develop a visual arts strategy which will underpin Bournemouth's renaissance as a cultural centre. The sub group should include substantial elements from the two universities.

In the early stages of festival development some of the existing events may be suitable for 'rebranding,' as part of the Bournemouth festival programme harnessing local talent under the direction of a festival creative director, with dedicated marketing support. From the case studies a range of between 12-15 events per annum seems to be the scope of most festival programmes.

The Bournemouth programme could be introduced by 'The Bournemouth International Festival' in May/June possibly early July, perhaps consisting of a combination of music, dance and theatre over 7-10 days (from the cases examined these would appear to attract significant audiences). In order for this to be launched in 2011 a creative director would have to be appointed within the next 3-6 months, in order to be instrumental in developing the event and the programme of events. An alternative would be to appoint a sub contractor but this may compromise the distinctiveness of the event. Brighton has organised their festival programme through Brighton Dome and Festival Ltd, which manages the annual Brighton Festival. It also manages Brighton Dome year round. It is a single charitable trust employing 75 permanent and 200 casual staff with an annual turnover of £6m.

The first major event should perhaps include performances by the Bournemouth Symphony Orchestra and dance companies with international appeal such as The English National Ballet and Ballet Rambert, which could provide additional dimensions to and raise the profile of local dance companies. These are however creative decisions that perhaps go beyond the remit of this report and require specialist creative direction.

Following careful evaluation and feedback from artists, attendees, the community and businesses, subsequent events could be planned, refining the festival offer and more comprehensively incorporating local talent.

The British Arts Festival Association survey 2008.

During 2008 The British Arts Festival Association commissioned a survey of its members plus 500 other arts festival organisers in the United Kingdom. A total of 193 festivals returned data giving an overall response rate of 32.5%. 41 BAFA members returned data. At the time this survey took place, BAFA had 88 members and so this survey represents 47.6% of those members. Since then, BAFA membership has risen to 110.

Arts Council/region	Festivals	%
London	24	12.5
South East	25	13
South West	30	15.6
East	7	3.6
East Midlands	11	5.7
West Midlands	17	8.9
North East	6	3.2
North West	15	7.8
Yorkshire	24	12.5
Scotland	16	7.8
Wales	18	9.4
	193	100

The breakdown by size of festival programme is as follows:

Annual Expenditure	Festivals	%
No Data	36	18.8
<£30k	59	30.7
£31-£100k	56	29.2
£101-£300k	23	12
£301-£500k	9	4.7
£501-£999k	6	3.1
£1m+	4	1.6

Over half (51.8%) of festivals in the survey were established after 1990. A quarter (25.1%) of festivals started less than seven years ago. The number of festivals established in 1990 or before declines sharply with each decade, to just 2.6% of festivals in 1951-1960. About one in twenty festivals were established in 1950 or earlier.

The average recorded length of festivals in this survey was 13.4 days with the median length at 9 days.

Duration of Festivals		%
<7 days	69	35.9
7-14 days	58	30.2
15-21 days	36	18.8
22-28 days	11	5.8
29-35 days	5	2.6
36-42 days	2	1
42 days	11	5.7
	193	100

The majority of festivals (67.1%) lasted for up to two weeks, with a steady decline in the number of festivals lasting up to six weeks (42 days). Fewer than 6% of festivals had duration of over six weeks.

As a rule, the average length of a festival increases with expenditure. However, festivals with an expenditure of £101k-£300k show a significant increase in length compared to other categories suggesting that such festivals tend to go on for a longer period of time in relation to their small expenditure. These festivals report an average duration of just over 20 days (+6.5 days above the average duration for all festivals).

In terms of festival frequency, annual festivals were by far the most common type in the survey (92.2%), with just over 5% taking place once every two years. Only a few festivals took place more than once a year, or every three years or more.

Audience

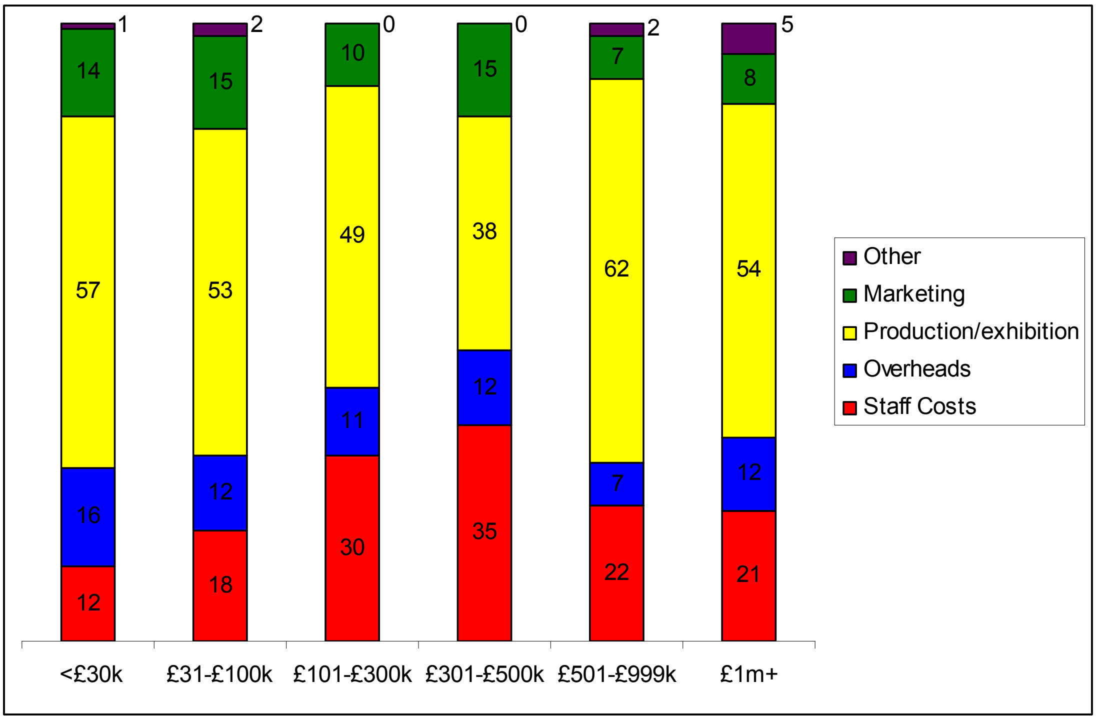
Festivals with an expenditure of £1m+ show the highest average attendances, over 1.2m; although it should be noted that only four festivals fall within this category (Edinburgh International Festival, Edinburgh Festival Fringe, Brighton Festival and The Guardian Hay Festival). This figure is also likely to be greatly affected by the large number of attendances at Edinburgh Festival Fringe's free, open-air events.

Smaller festivals average between 5,000 and 9,000 attendances. Medium-size festivals with an expenditure of £101k - £300k attracted a relatively high number of attendances at just over 53,000 on average. Scotland reported the highest average attendances per festival, at over 146,000, due to the very large festivals that take place in central Scotland, such as Edinburgh International Festival and Edinburgh Festival Fringe.

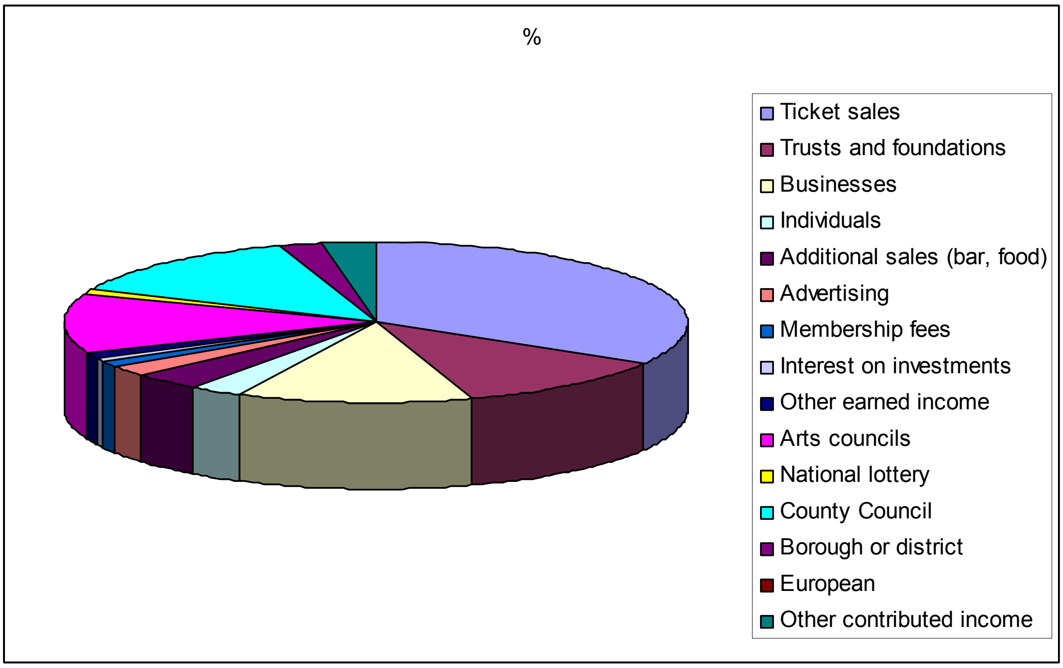
The South East reported the highest average attendances per festival for England, over 36,000. The West Midlands region shows a relatively high average attendance per festival of just over 32,000 which is attributable to three festivals recording high attendance figures: The Guardian Hay Festival, Birmingham International Jazz Festival and Worcester Festival. Other regions and countries show average attendances per festival of between 5,838 and 15,602.

Annual Expenditure	Festivals	Estimated attendances
No Data	36	769,835
<£30k	59	362,427
£31-£100k	56	756,260
£101-£300k	23	1,222,375
£301-£500k	9	220,423
£501-£999k	6	264,582
£1m+	4	1,551,909
	193	5,147,811

By looking at the spending profiles of festivals according to expenditure groups, certain trends can be identified across festivals of different sizes. To be clear, it should be noted that the trends detailed here do not refer to *amounts* of money between festivals (e.g. although staff costs of the largest festivals account for a smaller *proportion* of spending than medium-sized festivals, this does not mean that medium-sized festivals are *spending more*).



Income from the festivals in the study indicated that one third of income was generated by ticket sales; however, funding before the event was largely derived from local authority sources.



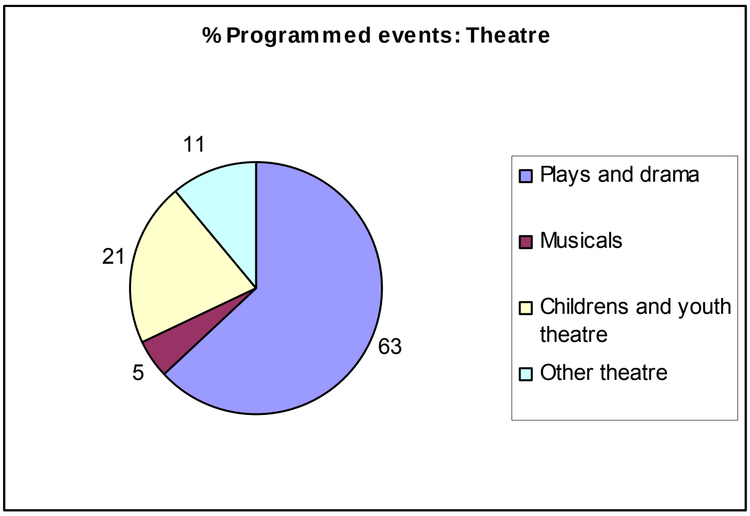
Income source	%	Interest on investments	0.5
Ticket sales	33.6	Other earned income	1.5
Trusts and foundations	11.3	Arts councils	12
Businesses	12.2	National lottery	0.9
Individuals	2.8	County Council	13.1
Additional sales (bar, food)	3.7	Borough or district	2.2
Advertising	2.1	European	0
Membership fees	1.2	Other contributed income	2.9

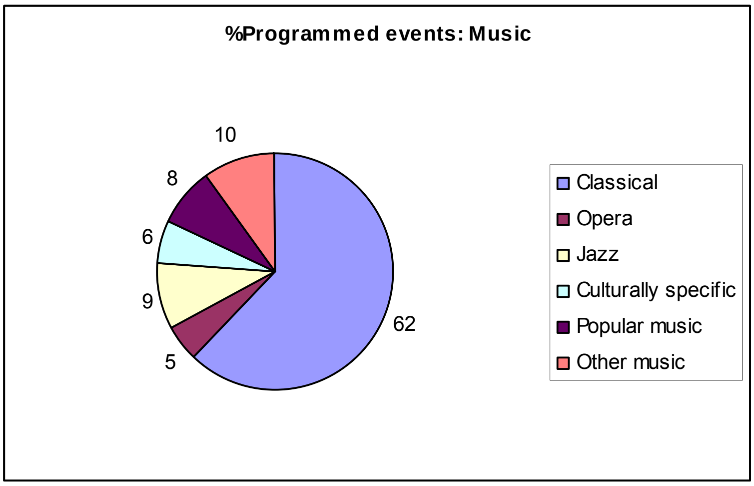
Small Festivals
Smaller festivals with an annual expenditure of less than £100k have similar spending profiles. Between 55-60% of spending for these festivals is attributed to production costs. Marketing accounts for between 13-14% of spending. There is a slight shift in the proportion of spending on running costs and staff costs for the two smallest categories of festival, although this difference is relatively slight at +/-5%. The larger festivals appear to spend more on staff and have reduced running costs as a proportion of overall spending.

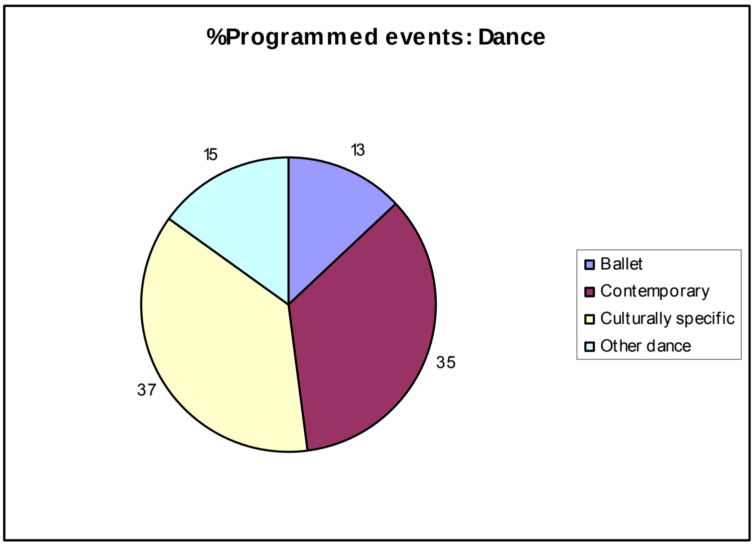
Medium Festivals
This trend continues into the medium-sized festivals with an annual expenditure of between £101k- £300k and £301k-£500k. These festivals report a much higher proportion of spending on staff costs at 30-35% (up to 23% greater share of spending compared to smaller festivals). This accounts for a significantly reduced share of spending on production costs compared to smaller festivals as running costs and marketing costs account for roughly the same proportion of spending as smaller festivals.
Larger festivals with an annual expenditure of between £501k-£999k and £1m+ show a spending profile similar to that of smaller festivals.

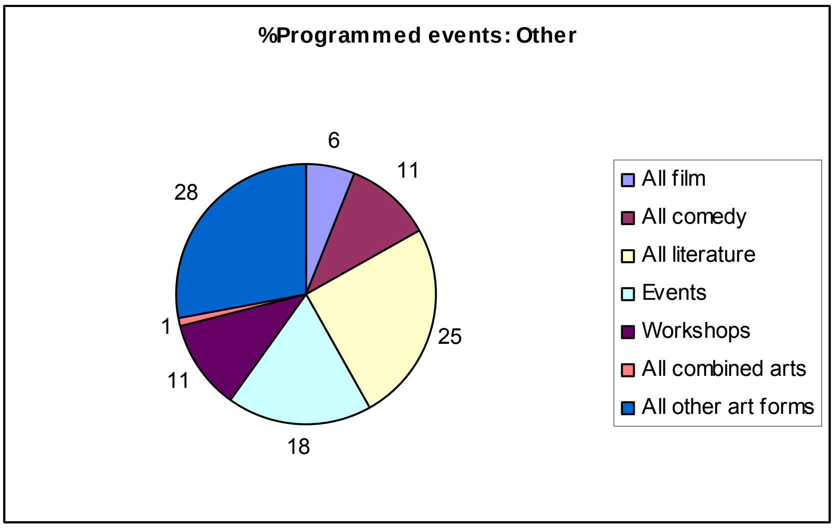
<u>Art forms</u>
The data provided in the BAFA research provides a breakdown of the types of events offered; there is probably a connection between the events offered and the popularity of these events in terms of audience numbers.

Art form (detailed breakdown)	**Total events**	**%**
Plays and drama	1002	19.4
Music (classical)	938	18.1
Comedy	698	13.5
Other art forms	318	6.1
Visual arts (events)	287	5.5
Literature	285	5.5
Music (other)	209	4
Jazz	191	3.7
Music (popular)	190	3.7
Children's and youth theatre	189	3.7
Music (culturally specific)	155	3
Opera	140	2.7
Visual arts (workshops)	126	2.4
Musicals	107	2.1
Film	71	1.4
Dance (culturally specific)	63	1.2
Theatre (other)	62	1.2
Dance (contemporary)	61	1.2
Dance (other)	38	0.7
Ballet	35	0.7
All combined arts	11	0.2


% Programmed events: Theatre
11
21
5
63
Plays and drama
Musicals
Childrens and youth theatre
Other theatre


%Programmed events: Music
10
8
6
9
5
62
Classical
Opera
Jazz
Culturally specific
Popular music
Other music


%Programmed events: Dance
15
13
35
37
Ballet
Contemporary
Culturally specific
Other dance



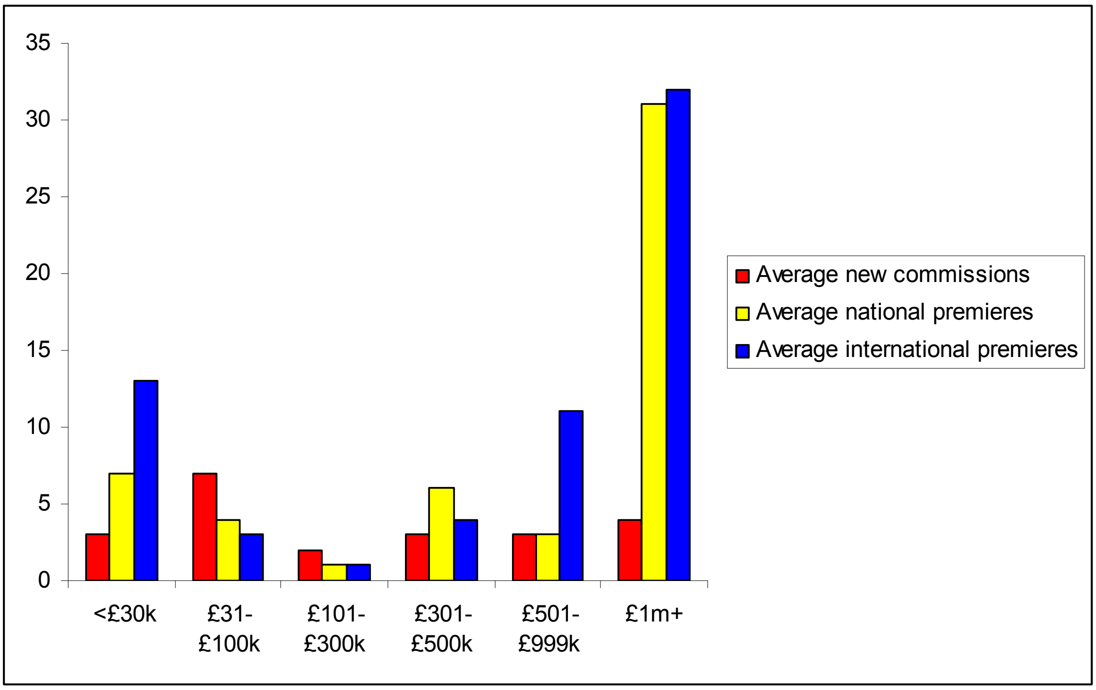
Art Form (summary)	Total events	%
Music	1823	35.2
Theatre	1360	26.4
Comedy	698	13.5
Visual arts and craft	413	7.9
All other art forms	318	6.1
Literature	285	5.5
Dance	197	3.8
Film	71	1.4
Combined arts	11	0.2

A breakdown of the summary event types for BAFA member festivals, separated into art forms, indicates the predominance of music programming, accounting for 1,823 (35.2%) of events overall – the largest share in this sample.

Theatre represents just over a quarter (26.4%) of programming and accounts for 1,360 individual events. Comedy appears to be the third most prolific type of event and represents a 13.5% share in programming. After this, visual arts and crafts, literature and dance represent between 3.5%-8% of all programming, with film and combined arts taking a relatively small share of up to 1.5%.

Other art forms, which account for just over 6% of programming, include circus, cabaret, walks, lectures, sound installations and master classes. When events are considered in more detail, by sub-dividing art forms into their major components, it is found that plays and drama account for the largest individual share of programming with a total of 1,002 events (19.4%). As such, about one in five of all events programmed at participating BAFA festivals can be considered to fall within this category. Classical music also appears to be a popular programming choice, accounting for 18.1% of events, similar to comedy which represents 13.5% of events of participating member programming. After these three dominant event types, all other art forms account for considerably less of the overall programming of member festivals, with each representing 6% or less.

New commissions
New work was commissioned by 44% of BAFA members participating in the study, who reported 68 individual commissions. National premieres were reported by 61% of members, accounting for 188 pieces of work. International premieres were reported by 46% of members, accounting for 933 pieces of work.



The chart above shows average numbers of new commissions and premieres according to reported annual expenditure of member festivals.

Medium-sized festivals with an annual expenditure of £101k-£500k show relatively little activity in commissioning new work and premieres compared to other expenditure brackets.

The majority of activity is polarised, involving mostly smaller festivals with an expenditure of less than £100k and larger festivals with an expenditure of £500k or higher. The majority of world premieres, for example, are reported by smaller festivals with an expenditure of less than £100k and very large festivals with an expenditure of over £1m. In terms of new work commissions it appears that festivals within the £31k-£100k bracket commission the most work. Interestingly, the data shows that for this sample the very large festivals have a mean new work commission rate only a few points higher than that of the smallest festivals. While the numbers of new commissions may be similar, it is important to recognise that the scale and value of these will in all probability be significantly greater for large festivals when compared to smaller ones.

The BAFA survey of festival organisers received details of employment from its 88 members at that time (2008). The table below provides a breakdown of employment types of those 88 members during 2007-2008.

Festival employment: staff, volunteers and artists (88 BAFA members)

	PAID POSITIONS			VOLUNTARY POSITIONS			ARTISTS & PERFORMERS			TOTAL
	FT Perm Paid	PT Perm Paid	FT Temp Paid	PT Temp Paid	FT Voluntary	PT Voluntary	Artists from the EU	Artists non EU Europe	Artists non EU	
All participating BAFA member festivals	150	59	294	321	14	1212	24318	445	4461	31274

Economic Impact

The Creative Industries are recognised nationally in the Government's Creative Economy Programme and in the SW Regional Economic Strategy and other relevant policy documents as a priority sector. However there are perceptions in the sector that the SW as a whole is at serious risk – for example the region may no longer be seen as their natural alternative base by London creative / media people and their businesses.

The Government have a vision of the UK as the world's creative hub and recently commissioned a report from the Work Foundation ("Staying ahead: the economic performance of the UK's creative industries"). The report identifies 8 drivers of success in the national creative economy. The first five of these drivers (set out below) are areas which the Regional Development Agency (RDA) can influence at a regional level in the SW and will also be relevant for the Agency's focused approach to the sector:

- Demand - encourage rich creative and cultural connections - not just in core cities but enable **access for all** across the region
- Greater diversity - **foster diversity and stimulate interdisciplinary innovation** in creative businesses
- Education and skills - should **focus on industry specific gaps** and **the commercialisation of creative ideas**
- Networks - more **brokerage to fill gaps** in knowledge and skill sets
- Build business capacity - need to **focus on the blockages** and hurdles that restrict business growth
- Public sector - grants to the creative / cultural core should be organised to maximise impact and spill over to the economy
- Level playing field - there is a need for a further public (competition) investigation of structures which inhibit access to market (ie in film and games)

Government has also highlighted that it is their intention to publish a Green Paper this autumn on how it proposes to address the conclusions of the Work Foundation report and propose a policy framework for further development. A further report on 'access to finance' for the sector is expected shortly.

The Creative Industries in the South West have already been acknowledged as a regional strength. According to Broadcast Magazine's Nations and Regions survey, eleven of the top 50 regional independent production companies are based in the South West. Aardman Animations has the coveted number one slot with turnover in 2006 of £43.7 million, Twofour in

Plymouth are at three with a turnover of £16.1 million, whilst Bristol-based Tigress is close behind at number four. Big hits produced in the region include Deal or No Deal (Endemol), Planet Earth (BBC NHU), Skins (Company Pictures), and Shaun the Sheep (Aardman). There are however significant disparities in the level of investment across the south west with Cornwall receiving £112mn and Dorset £4mn in the recent RDA investment programme.

Cultural Tourism in Bournemouth

Tourism in Bournemouth and Poole generates approximately £612m of direct visitor expenditure (2005). This supports (directly and indirectly) an estimated 17,500 jobs (about 12,700 in Bournemouth and 4800 in Poole). The various case studies of other conurbations indicate that this total could be increased by 5-10% over a four to five year period; potentially providing another £30mn of tourism income to Bournemouth in the early years of festival development. The wider economic benefits of a successful creative economy are more difficult to estimate, but the possible attraction of media and creative businesses to the area would add significantly to the success of the local economy, including the retention of graduates from the two universities. The social and community benefits are equally difficult to estimate but potentially significant.

Volume and Value of tourism in Bournemouth and Poole						
	Trips		Nights		Spend	
	000	%	000	%	£m	%
Overall total	**7004**	**100**	**6523**	**100**	**612.4**	**100**
By main market group						
Domestic (staying)	1518	22	5149	79	316.3	52
Overseas (staying)	160	2	1374	21	69.3	11
Day trips	5326	76			226.8	37
By purpose						
Holiday (staying)	1201	17	4613	71	272.5	44
Business (staying)	207	3	619	9	56.6	9
VFR (staying)	236	3	929	14	36	6
Other (staying)	16	0	103	2	12.8	2
Study (staying)	24	0	276	4	8.5	1
Toyal staying	1684	24	6523	100	385.4	63
Day trips	5326	76			226.8	37
By destination						
Bournemouth	4308	62	4572	70	426.1	70
Poole	2696	38	1951	30	186.3	30

The 2008 visitor survey identified the following key aspects of visitor activity:

- **Accommodation:** The majority of staying visitors were either on an additional holiday or short break (60%). The majority of staying visitors had accommodation in Bournemouth itself. Hotels were the most popular type of accommodation. Most visitors were staying between 4 and 7 nights. The majority of visitors booked their accommodation in advance with the majority booking through their accommodation provider.

- **Activities and Attractions:** The seaside, beaches and coast and the countryside were the main factors which attracted visitors to the area and that they had visited the area before. The majority of respondents participated in walking (76%), exploring towns and villages (54%) and shopping (54%). The most popular place for respondents to visit whilst in Bournemouth was the pier (70%) followed by Durley Chine (64%).

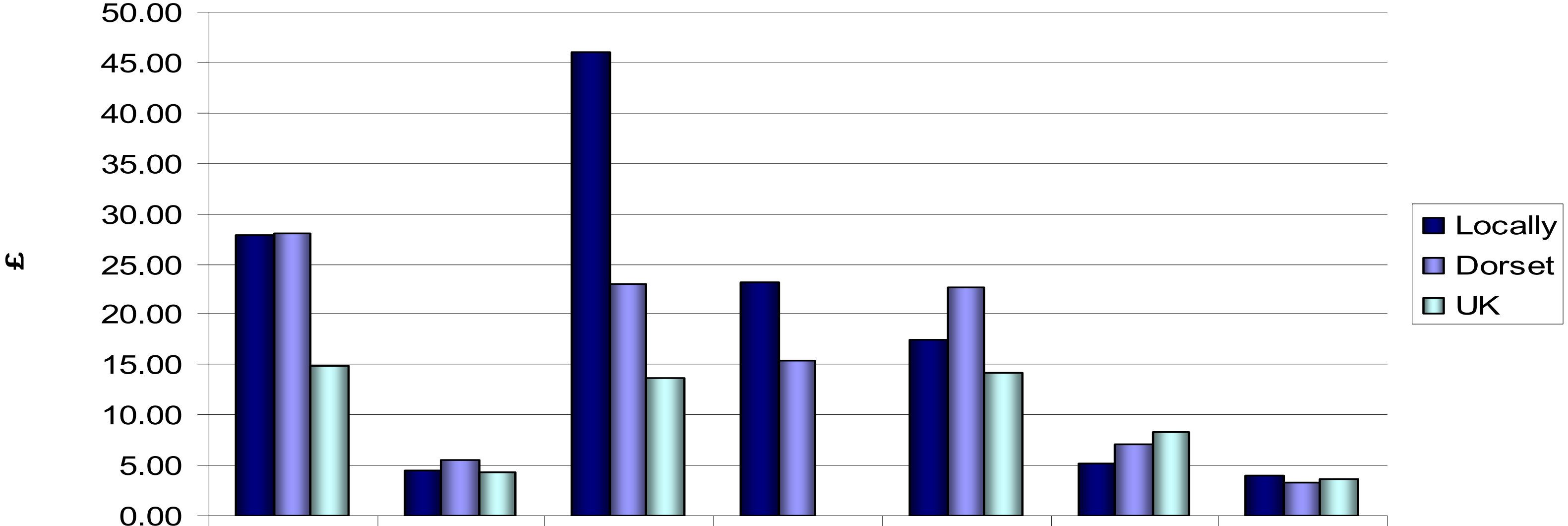
- **Expenditure:** Respondents spent on average the most on food and drink and the least on convenience goods.

- **Visitor Demographics**: 94% of respondents originated from within the UK, most frequently from the South East (34%) and South West (18%). Respondents most frequently belonged to either the B (25%) or C1 (45%) socio-economic groups. 56% of respondents were visiting in a group of two adults with no children. 24% of respondents were visiting with children.

It is anticipated that a comprehensive festival programme for Bournemouth will attract higher spend visitors from the AB socio economic groups. Festival visitors have particularly high economic value: Research data collected for an evaluation of festivals in the West Midlands, suggests that visitors to arts festivals are generally younger and have a much higher economic impact than other tourists, even other cultural tourists. Comparison with the figures for the UK Tourism Survey (UKTS) seems to demonstrate that visitors to festivals spend more and stay longer than other cultural tourists, ultimately making the very significant contribution to the local economy.

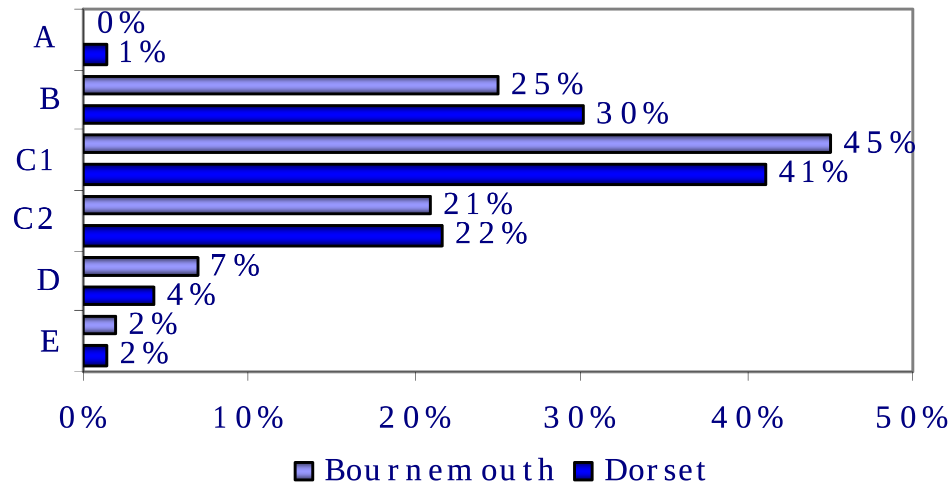
When measuring the economic impact of any cultural activity, in most instances, the greatest part of the impact is made by audiences spending money on hospitality, accommodation, retail and travel into the economy of a specific geographic location. As an example, in 2004, Brighton Festival generated £22 within the city's economy for every £1 spent on tickets and thereby accounted for over £20m within the local economy alone. Although Brighton represents the larger end of the festival spectrum, it gives an idea of the secondary impact or 'knock-on' effects that festivals have on local economies and, ultimately, on the UK economy as a whole.

Breakdown of expenditure: 2008 Bournemouth, all visitors



	Food and drink	Convenience Goods	Durable goods	Entertainment and Leisure	Visitor Attractions	Fares and Petrol	Other Costs
Locally	27.80	4.53	45.96	23.13	17.56	5.12	3.92
Dorset	27.95	5.50	23.00	15.43	22.75	7.04	3.29
UK	14.88	4.25	13.67		14.14	8.33	3.60

Bournemouth visitors 2008 – Socio economic groups


A
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45%
41%
21%
22%
7%
4%
2%
2%
0%
10%
20%
30%
40%
50%
Bournemouth
Dorset

In addition, visitors show more loyalty through repeat attendance than more locally based festival attendees: once a festival has attracted a visitor, that visitor has high potential to become a regular attendee in future years.

A review of the economic impacts' of festivals provides various estimates, much of this variation is caused by the different methodologies used in collecting and analyzing the data and so direct comparisons are usually unhelpful. The Brighton Arts festival programme perhaps provides the nearest and most relevant competitor for comparison. Although in terms of market positioning, the Bournemouth festival programme with the Bournemouth Symphony Orchestra as a benchmark of excellence for festival programming, could potentially be seen as offering more international and national appeal.

Estimates of spending by visitors attending the Brighton festivals in 2004, including money spent on tickets (£1million) , meals, drinks, accommodation, shopping, taxis , amounted to, £20 million in 2004. Local businesses invested over £400K in the Festival Open Houses, artists received over £840K in sales. Public Sector support of £1.1 million brought a return on investment of nearly £20 million into the City's economy.

Manchester is less of a direct competitor but has a festival programme developed during the last two years. A report by Cambridge Policy Consultants in the planning for the Manchester Arts Festival which commenced in 2007 (15 events) predicted that the festival would attract 160,000 visitors in the first year and 270,000 in subsequent years, bringing in £34m in economic benefit. The actual visitor numbers were higher.

The Manchester International Festival, 2007, aimed to reach an attendance of 160,000 (committed £470,000 for the 2007/8 programme) which it exceeded in its first year and 270,000 (231,455 in 2009) in subsequent years. The Newcastle Science Festival, founded in 2003, whose attendance doubled to 41,000 in 2005, is chasing the Edinburgh International Science Festival's 77,000 (2005).leading to further financial commitment by the City council for future years. The budget for 2005-6, 2006-7, for the first half of 2007-8 until after the first festival was £5m of which £2m was from the City Council; £0.65m from the North West Development Agency; £0.5m from the Arts Council of England for preliminary events in the lead-up to the festival; £0.5m from other public sector; £1.35m from private sources. –

For Bournemouth to offer an arts festival programme from 2011 it is estimated that Bournemouth Borough Council would be required to commit at least £2.5 million per annum for a four year programme with a further £2-3 million per annum from other funding sources (total of £5mn per annum, year one may require a higher commitment of up to 75% of cost by Bournemouth Borough Council). The returns could potentially be an additional £20-£30 million pounds per annum to the local economy accrued mainly during the shoulder and low periods of the tourist season between September and June during the first year.

APPENDICES

The Case Studies

The following case studies have been compiled from existing reports and other sources including the 'Thundering Hooves' report prepared by AEA consulting for Edinburgh City Council in 2006. Figures and references have been updated where possible.

Edinburgh
Edinburgh rates among the smaller of the festival cities benchmarked with a population of 450,000 within the city and 780,000 people in the surrounding region. Singapore has over 4m inhabitants within its metropolis, Barcelona over 4.6m, Melbourne 3.6m, Montreal 3.5m, and Manchester 2.5m. Edinburgh's international comparator cities all have significantly larger financial resources available due to their scale; thereby generating substantial sources of income that could be applied to festival development should this become a priority for the city. The population and economy of comparator cities are all growing, even though certain cities, like San Francisco and Montreal, have had recent dips.

Edinburgh had the fastest growing economy in the UK after London to 2008 (although Manchester and Newcastle were close behind); at 2.9% it had the lowest unemployment rate of all the comparative cities (Amsterdam 6.1%, Montreal 7.5%), which is particularly impressive when compared to UK cities (Manchester experienced a 9.1% unemployment rate in 2007 and Newcastle 8.4%). It still has a competitive GDP per capita rate and an educated workforce: 32.8% of the workforce has a higher education degree. This is lower than San Francisco, the most educated workforce in the US, where 48% of its population over 25 has a university degree, but it compares well with Newcastle/Gateshead (25.1%) or Manchester (24%).

Edinburgh's average weekly wage (£467) is fractionally lower than the UK average (£476). Despite considerable increase in research and development, per capita spending is lower in Scotland than the rest of the UK. Edinburgh runs the risk of being a victim of its own success. Visitor and performer accommodation costs in Edinburgh have risen 120% since 1997, against a 27% rise in ticket prices for festival events.

Infrastructure
Edinburgh's size and geography helps to create a festival atmosphere that is difficult to replicate. However, Edinburgh's transport infrastructure does not compare well with those of its competitors. In addition, other cities either have developed, or are proposing to make, significant improvements to cultural venues and infrastructure, and Edinburgh does not compare favourably with any of the chosen non-UK competitor cities. Edinburgh is progressing plans for tram lines serving the city centre, airport and the waterfront. Approximately £535 million has been committed to date, with the first trams scheduled to be running in 2010. A rail link to Edinburgh Airport is also being considered by

the Scottish Parliament. This would provide direct rail services between the airport and towns and cities across Scotland, as well as to Edinburgh itself. Without investment of this scale, in infrastructural terms Edinburgh will fall behind UK competitors.

Compared to San Francisco, Montreal, Amsterdam and Singapore, Edinburgh's air passenger capacity is tiny. Within the UK, Manchester's airport is the 11th largest in Europe and 46th largest in the world with 95 airlines serving 180 destinations. *Lonely Planet*, for example, encourages visitors from Europe to fly in to London and take the train to Edinburgh.

Within the city, public transport is limited although the size of the centre makes travel by foot and cycle more palatable than in bigger cities such as San Francisco. Nevertheless, other cities provide a wider variety of transport. Amsterdam, for example, in addition to buses and trams, runs a metro and a public boat service and is investing in extensive new metro lines. Melbourne has one of the world's most extensive tram networks, almost 300 bus routes and a train system with 15 lines. The Edinburgh bus system does not link festival venues especially well, and timetables do not take into account the late evening/early morning transport requirements during the festival period.

No data exists that allows for clear comparison of volume and quality of the cultural venues in each city. Cities are building performance and exhibition venues to focus cultural attention. Gateshead has built The Sage and the Baltic; Manchester built a new stadium for the Commonwealth Games; Amsterdam has recently completed the 1,850 seat Van den Ende theatre; Montreal is proposing to build a massive entertainment complex that will open in 2010/2011; and Singapore possesses the recently completed 'Esplanade – Theatres on the Bay' and is planning a series of new museums. Barcelona has invested substantially in renovating and building new cultural venues since the 1990s to reinforce its pre-eminence as a world class cultural destination. A 15,000 to 20,000-seat performing venue has been mooted for construction in San Francisco. The Edinburgh Festival Theatre was extended in the early 1990s, with work completed in 1994, and the renovation of the Usher Hall is underway.

Taken as a whole, Edinburgh's small city centre and topography help to promote a festival atmosphere, a quality impossible in larger, more diffuse cities, such as San Francisco or Manchester, where a number of the festivals do not take place in the centre. It is striking that the San Francisco Jazz Festival does not seek to generate a festival 'atmosphere'. Melbourne has suffered from the same problem, but is taking steps to remedy it. It has built Federation Square to provide an area that will allow the festivals to succeed in their aim of 'setting the city on fire'

Public Funding

Edinburgh's overall cultural budget appears lower than comparator cities on the basis of per capita spending. The majority of festivals receive subsidy from public bodies, but the extent varies dramatically from festival to festival.

Edinburgh City Council's culture and leisure spend (£19.2m in 05/06) was 2.8% of total budget (£684m in 05/06). Cities all define 'culture' differently and therefore budget figures should not be used as comparative tools. However defined, there appears to be, amongst the cities studied, a budget threshold for 'culture' of around 4% of the overall municipal budget. Amsterdam, Montreal and San Francisco have cultural budgets of approximately 4%. It was proposed that Edinburgh City Council should work towards achieving a 4% threshold for "Culture" to reflect comparator cities. Had this been the case in 2005/06 the City Council would have invested £27.4m into festivals, theatres, visual arts and other cultural services

The level of public municipal funding differs by city and by festival. A number of festivals do not provide details of income, which prevents conclusions about the average public funding for the festivals. Publicly available city budgets rarely offer festivals as a separate cost centre. However, public subsidy is the norm. For example, three festivals surveyed in Amsterdam, had a high level of public subsidy (performers at the Uitmarkt are unpaid as there is no ticketing so all has to be funded). Several of Singapore's festivals are run and funded almost entirely by the National Arts Council, a government agency. The Manchester International Festival (commenced 2007) was subsidised during the first years (almost 75% public funding); whether this will be sustained in the long-term is unknown. The Manchester Comedy Festival was subsidised, but is now being part-funded by smile.co.uk. It is difficult to make meaningful generalisations about San Francisco. Its fringe has a small subsidy (9%, 2007), it raises 11% privately and the rest is earned – performers, however, receive 100% of box office income – while the Jazz Festival enjoys a suite of income streams, including memberships, patrons, merchandising, sponsorship, business support, and municipal support – a model of diverse revenue generation. Manchester Comedy and International Festival, Singapore Festivals, and the Newcastle festivals are most notable examples of new public investment in festivals.

Festival Offer

For the number and range of large festivals, Edinburgh's festival season in August is unrivalled in the world. In terms of festival days per year (calculated by adding the length in days for each festival found in each city), Edinburgh's offer is not exceptional. No one city can completely match Edinburgh's offer exactly, but most of Edinburgh's festivals have equivalents in other cities.

In the winter period, none of the comparator cities except Montreal have exploited the Christmas/New Year experience in festival terms on the scale of Edinburgh, although Singapore undertakes major promotions that focus on shopping in the November-January season directed at Asian markets. Other cities, however, maintain a less seasonally specific offer, providing festivals throughout the year. Montreal and Melbourne are examples of this kind of city with a greater spread throughout the year and Barcelona's summer festivals and fiestas (May through October) in total offer a large critical mass of activity.

In terms of festival days/year, Edinburgh's offer is not exceptional. At 251 festival days per year, Edinburgh's festival offer is far larger than its UK rival

Manchester at 134 festival days, but is not especially imposing when compared to its international comparators. Barcelona presents 226 festival days/year, Melbourne 281, San Francisco 264 and Singapore 234. Only Amsterdam, which presents 177 festival days/year, is significantly smaller, while Montreal, at 397 festival days/year is very much bigger. (London, Paris and New York were not included in this study.)

Such a calculation cannot convey the intensity of programming within the city. The fashion of labelling theatre or music seasons as ‘festivals’ often masks the ordinary or sporadic nature of the programming schedule that lies behind them. Festivals by most standards provide multiple performances per day. A thorough analysis of performance numbers in the festivals offers the chance to compare the programming ambition in each city. Analysis suggests the following insights. It is clear that the number of productions at Edinburgh Festival Fringe far outstrips Montreal and San Francisco’s Fringes combined. Indeed, when contrasted with a suite of festivals, Edinburgh Festival Fringe offers unbelievable choice and activity. Festival atmosphere, when understood as directly related to the number of performances per day during the festival, is made by Fringe events. When compared to other international arts festivals, the Edinburgh International Festival’s performance per day ratio is mid-way between Singapore (largest) and the Holland Festival (smallest). Among the jazz festivals, it is Montreal that is way ahead of the pack in terms of performances.

No one city can match Edinburgh’s offer exactly. Montreal has six festivals that match Edinburgh’s with any exactness (a children’s theatre festival, a jazz festival, a fringe festival, a new film festival, a literary festival, and a storytelling festival) and markets itself as a ‘city of festivals’ as actively as Edinburgh. Melbourne has five major festivals in common with Edinburgh’s (a jazz festival, a fringe festival, an international arts festival, a film festival, and a literary festival), and is beginning globally to promote its festival cluster. Across the range of cities, jazz festivals and arts festivals stand out as the most common. Barcelona, Manchester, Melbourne, Montreal and San Francisco all have jazz festivals (Amsterdam has a World Roots Festival); while Amsterdam, Barcelona, Manchester, Melbourne and Singapore all have festivals comparable to Edinburgh International Festival, at least in terms of number of productions and performances, and in certain cases attendance figures. (A comparative evaluation of programming quality, on the basis of expert opinion, was not part of this study.)

Film festivals are also common. Montreal, Barcelona and San Francisco provide throughout the year a large number of relatively small film festivals that celebrate subgenres and interest groups. In a sense, these cities might be considered film festival cities in a way Edinburgh is not. However, the Edinburgh International Film Festival does not look to the particular set of cities chosen for this study as its direct industry comparators. Many of Edinburgh’s festivals have a broadly comparable festival in one of the festival cities. The Children’s Theatre Festival is matched by *Les Coups de Theatre Le Forum International des Arts Jeune Public* of Montreal; the International Science Festival has a comparator in Newcastle’s Science Festival; the

Fringe has equivalents in Melbourne, Montreal and San Francisco; Newcastle has a Mela; the International Storytelling Festival is matched by the Quebec Intercultural Storytelling Festival. None of the cities had a Tattoo or a Hogmanay, although Barcelona is replete with calendar festivals, usually saints' days. (The study embarked on a city-to city comparison. There may be value in further festival-to-festival comparisons, not necessarily in the currently benchmarked cities.)

Brand

No city provides greater visibility to its festivals than Edinburgh, although Montreal and Melbourne are aspiring to do so. This relationship is being made even more explicit in the marketing campaign around 'an inspired Edinburgh' which draws explicitly upon the festivals for that inspiration.

The Edinburgh City Region Brand – 'Edinburgh Inspiring Capital' was launched in May 2005 and is the destination brand of the city region which is being used to attract tourists, inward investment and talent to the area. It provides a coherent visual identity and messages for the city region and for all the sectors in the area, acting as an umbrella brand. The cultural sector and, in particular, a number of the festivals were involved in the development of the brand.

The brand is intended to work in synergy with all the festivals and over time should add value to their promotion as the marketing plan for the brand is implemented.

Nearly all the festivals choose to specify their home city in their title – the San Francisco Blues Festival, the Singapore Arts Festival, and so on. There are exceptions, such as Sónar in Barcelona, or the Festival of New Cinema and New Media in Montreal. Nevertheless, there is little evidence of a city brand dominating the city's festivals or any attempt to integrate festival brands within each city.

Newcastle/Gateshead's '2005 Alive' brand was introduced to represent Newcastle/Gateshead as a festival location, but, being date specific, does not offer long-term potential as a brand. It serves to promote disparate events that hitherto had no umbrella or relationships to one another.

The quality of city websites differs greatly. Amsterdam and Montreal provide the best city websites and link quickly to the festivals. Others are surprisingly poor: Barcelona and Singapore are instances of websites that provide inadequate insights into their respective festival scenes, although Singapore has plans to construct a new comprehensive gateway tourism portal.

The level of promotion for the festivals differs between cities but there are no cities that are placing festivals right at the forefront of their cultural offer to the exclusion of other events. Even Montreal, which asserts that it 'parties longer, harder and way more often than any place on earth', and may indeed have the most festival days in the world, does not provide its festivals with exceptional visibility on its website. Indeed, Amsterdam, with a smaller festival offer, nevertheless makes its festivals equally visible. The website edinburghfestivals.co.uk is unique and is to be commended, although it can be much further exploited and developed.

Management, Governance & Collaboration

Many festivals in the comparator cities experience similar governance challenges to those evidenced in Edinburgh. There are instances of occasional collaborations between festivals in other cities but over all the evidence of collaboration among festivals within cities is modest. There is increasing 'talk' in most cities of the need for increased collaboration but few signs of concrete actions being taken.

Festivals remain largely independent of one another. However, there is evidence among the newer entries into the festival scene, such as Newcastle and Manchester that municipal councils are being interventionist and trying to encourage collaboration between festivals. For example, amongst the various 'Festivals of the River and the Sea' (an umbrella sub-brand of Newcastle's 2005 Alive festival campaign) the Source of the Tyne Festival and Festival of the Coast collaborated on their marketing campaigns with one another and with an assortment of music festivals.

There is no example of a city-specific umbrella organisation independent of local government that coordinates festival strategy or festival ticketing although certain cities, such as Amsterdam, have developed festival strategies within a broader city cultural strategy. In terms of governance, many festivals studied have articulated problems: large and unwieldy boards, political interference, difficulties in recruiting skilled artistic directors; unclear divisions of responsibility. In most festivals, the Artistic Director remains the key figure within the organisation, although the styles of direction vary enormously. Friction between Directors and their Boards, or Boards and their public funders are often concentrated on poor performance at the box office or negotiations over levels of public subsidy.

There is little evidence of significant bilateral collaboration between festivals, let alone collaboration among festivals within cities. An exception is Singapore. Some of Singapore's festivals are directly funded and run by the National Arts Council – the festivals are produced in house and therefore necessarily are a product of collaboration. Singapore Arts Festival has operated as a receiving house for programmes conceived or put on first by the Hong Kong Arts Festival. It has also collaborated with the Melbourne International Arts Festival. The Holland and Amsterdam Roots Festivals have collaborated with one other: the Roots Festival obtained use of Holland Festival's greater spending power and Holland Festival got the benefit of higher attendance numbers. Yet the collaboration ended last year as the directors felt it was too burdensome. They are prepared to work together again but only on specific projects.

In no city did festivals appear to share overheads or marketing responsibilities with one another. In the first instance festivals appear drawn to comparable festivals in the region, rather than festivals within the city. Hence, festivals are represented by umbrella networking organisations such as the Asia Pacific Arts Festival Organisation, International Jazz Festivals Organisation, Jazz Festivals Canada or European Festivals Association.

The Holland Festival is advertising for new partners but this is exceptional. The lack of evidence for collaboration between festivals may be the result of singular importance of the uniqueness of festivals, or at least the appearance of uniqueness. Brand alliances appear unheard of.

Programming
Most festivals claim, predictably, to have innovative programming. The majority of festivals offer a little of the old and the new to appeal to a wide audience and almost all of them place an emphasis on being cutting-edge. There are exceptions, such as the San Francisco Blues Festival, but most cultivate the image of experimentation. Singapore Arts Festival is trying to introduce contemporary and cutting edge Asian art. Sónar in Barcelona and the Festival of New Cinema and New Media in Montreal are aspiring to be genuinely leading-edge festivals.

Manchester International Festival, commenced in 2007, presented exclusively newly commissioned work, a policy it contrasts to the programme policy of the Edinburgh International Festival. Such an emphasis on innovation does not guarantee happy critics or visitors, as Avignon Festival has discovered in recent seasons. All festivals studied strive to develop a programming policy that allows them to pursue an artistic mission whilst expanding audiences and revenues. When examining mission statements and policy documents of festivals, there is often little differentiation in the language used. It is the interpretation of the policy in terms of selecting the programme that gives each festival its distinction. However, there appears to be an increasing homogenisation in the programmes of similar types of festivals, which claim they are distinctive, but are clearly not so when viewed alongside their peers, as the market for presentations becomes increasingly global.

Festivals endeavour to harness local talent as well as introduce locals to the best of international talent. The Uitmarkt, for example, presents a largely Dutch-speaking programme using local talent. Between the various fringe festivals risk is allocated differently. In Edinburgh, the performers take the financial risk; in the Manchester Comedy Festival, by contrast, the performers are paid by the festival, which takes the financial risk. In San Francisco, fringe performers are chosen by ballot and they take all receipts at the door. The expense of performing at the Edinburgh Fringe (let alone paying for accommodation) risks becoming a disincentive to groups with little money irrespective of artistic ambition.

Perhaps surprisingly, city festivals have not linked their programmes with city theme years. Amsterdam has been keen to use themed years to drive up visitor numbers (they have recently completed a Rembrandt year), but the festivals do not appear to have been affected by this. Barcelona has adopted a similar strategy (Gaudi year, year of design, etc).

Ticketing
Edinburgh has probably the most sophisticated ticketing operation among all the festival cities. There is no evidence of exceptional ticketing practices in other cities, although certain cities (Montreal, Singapore, Melbourne) are exploring new ticketing initiatives. Whether Edinburgh's lead remains in the future is a question of speculation, but there is increased discussion in other cities of introducing enhanced ticketing operations. The Edinburgh Festival Fringe's website, which allows customers to view the programme and, through linked access to festival sites, to buy tickets online, is particularly impressive. There is no evidence of exceptional ticketing practices in other cities and at present no dedicated festival portal of the kind supported by Edinburgh.

No city tourist portals offered ticketing services directly under their own brand, although offered links to ticketing websites. Many festivals offered online ticketing facilities. Most festivals provided a range of ticketing portals, including dedicated ticketing companies (like Ticketmaster) telephone, integrated box office, venue box offices, and newsagents, post offices and related stores (e.g. record shops for the San Francisco Blues Festival).

Although a number of cities have the equivalent of the Edinburgh Pass, a card allowing discounted and free entry to a wide range of attractions, none of these city passes allowed access to festivals (e.g. Amsterdam card). Nor is there among any cities a Festival Ticket, allowing discounted or priority access to the city's festivals.

A number of festivals, such as the Uitmarkt in Holland, are free entry.

Visitors
Edinburgh's tourism figures are at a level similar to those of its comparators, impressive given the city's relative size, small airport and weather. Its figures cannot, however, compete with the most popular tourist destinations. Edinburgh's flagship festivals have competitive attendances. New UK festivals may compete better with Edinburgh in terms of attendance in the near future. Firm conclusions are difficult as a result of inconsistencies in data collection and a lack of detailed segmentation within festival visitor statistics available.

The different means employed by the cities in measuring visitor numbers makes comparison difficult. It appears that Edinburgh, with 13m bed nights per year, fares relatively well next to its comparator cities: Barcelona receives 10.1m and Amsterdam 8m. Other cities, such as Melbourne (19.5m), receive considerably more. Edinburgh is well ahead of its UK festival competition in this respect, and at present looks healthy, with visitor numbers increasing. As a percentage of total tourists, the level of overseas tourists to Edinburgh is at present declining.

Edinburgh's flagship festivals are well attended in comparison to their international counterparts. Edinburgh International Festival's ticketed attendance of 153,000 (average, 2000-2004) compares well to that of the

Holland Festival, which has 50,000 (2005), and the Barcelona Grec, which received 166,000 (2004). A comparison with Singapore's Arts Festival is potentially misleading as the latter's attendance figure, 601,000 for 2005, includes 400 free events. The Edinburgh Fringe's ticketed attendance of 1.25m (2004) dwarfs that of both the Melbourne Fringe (191,000 free and ticketed visitors in 2004) and the San Francisco Fringe (6,629 visitors in 2004). Montreal's Jazz Festival and Just for Laughs Festival exceed the Edinburgh Fringe's numbers, with 1.9m and 1.65m patrons respectively, although these figures include free events. Edinburgh's festivals may be threatened in terms of size by new UK festivals – the Manchester International Festival, 2007, aimed to reach an attendance of 160,000 (committed £470,000 for the 2007/8 programme) which it exceeded in its first year and 270,000 (231,455 in 2009) in subsequent year. The Newcastle Science Festival, founded in 2003, whose attendance doubled to 41,000 in 2005, is chasing the Edinburgh International Science Festival's 77,000 (2005).

The Edinburgh Festival attracts tourist from all over the world, over the last decade cultural tourism has increased in large numbers. According to official Edinburgh International Festival Audience Research: 43% of the Festival's audience comes from Edinburgh and the Lothians, 18% from the rest of Scotland, 21% from the rest of the UK and 17% from overseas. Visitors stay an average of 8 nights in Edinburgh.

Economic Impact

Edinburgh's festivals have a significant and beneficial economic impact. Many cities are trying to capitalise on this. Data on the economic impact of festivals is sporadic.

That festivals bring significant economic benefit is undeniable. Sonar is estimated to generate €47m for the Catalonian economy, creating 216 jobs; and the Melbourne Fringe has an estimated total economic benefit across Australia of A$18.1m and 118 jobs. A study conducted into the economic impact of the cultural sector in Montreal concluded that the cultural sector generated a real economic impact of C$4.7bn, of which an estimated 82% share stayed in Montreal, exceeding the tourism sector's figure of 69%. The Edinburgh Festivals 2004-5 Economic Impact Survey estimates that the Edinburgh summer festivals generate £126.5m for Edinburgh, support 2,500 jobs, and contribute £134.7m for Scotland as a whole. Other cities which are not traditionally known for staging festivals are increasingly aware of the economic and tourism-related benefit of festivals, and are taking steps to increase their offer. The Manchester International Festival is projected to generate £34m for Manchester in return for £3.65m public investment. Newcastle is making use of festivals as part of its tourism strategy.

The Festivals and the City

Edinburgh has been the capital of Scotland since 1437 and is now the seat of the country's devolved government. The city came to European pre-eminence during the eighteenth century when it was one of the major centres of the Enlightenment. The Old Town and New Town districts of Edinburgh were listed as a UNESCO World Heritage Site in 1995. It is home to many of the major bodies responsible for cultural life in Scotland, including National Museums Scotland, National Galleries Scotland, the Scottish Arts Council, National Library of Scotland, Scottish Museums Council, and the Royal Commission on the Ancient and Historical Monuments of Scotland. It is home to the Scottish Chamber Orchestra, a selection of fine galleries, such the National Gallery of Scotland and the Scottish National Portrait Gallery; and some of Scotland's finest museums, such as the Royal Museum, the Museum of Scotland, and the National War Museum. The Edinburgh Festival, which takes place in August, is the highlight of Edinburgh and Scotland's cultural year and the biggest arts festival in the world.

Edinburgh had a total resident population of 448,624, while 779,180 persons live in the wider metropolitan area. This makes it the smallest of the festival cities studied. It has an ageing population offset by the large numbers of young students that reside in the city. It has a successful economy that is showing the strongest growth of any city in the UK. GDP per capita in 2001 was £22,168. The main contributors to Edinburgh's wealth are the tourism, finance, and education sectors.

Edinburgh had an enviable unemployment status in 2008: only 2.9% were unemployed. It has a highly educated workforce: 32.8% of the working population aged 16-74 has a higher degree. Edinburgh was not evaluated in the Mercer Human Resources's Annual Quality of Life Survey of 2005 nor 'The Economist's' hardship rating. However, in a recent survey conducted by YouGov with support from *The Economist* and Condé Nast, Edinburgh was voted 14th in the list of the world's most glamorous cities; 13th in the list of the cities with the most vibrant culture, and 19th in a list of cities with the best quality of life.

Edinburgh was recently voted the most talked about city in the UK by UK citizens and the fifth most talked about city in the world. Trudi Harris, of the advertising firm Leo Burnett that helped compile the YouGov survey, said one of the reasons Edinburgh was at the tip of so many tongues was the Festivals. According to readers of *Condé Nast Traveller* magazine, Edinburgh is the third most satisfying UK city to visit after London and Glasgow. The city of Edinburgh spent £19.2mn on 'culture and leisure' in 05/06. This is 2.8% of the overall budget. This is set to decline by 06/07 to £18.7m, or 2.7% of the total Council budget.

Edinburgh is the 'engine room' of Scottish tourism and hence of central importance to Scotland's economic health. Edinburgh has been voted Favourite UK City for five consecutive years since 1999 in the *Guardian/Observer* Readers Travel Awards. Approximately 25,000 people are employed in Edinburgh's tourist industries, which supports almost £1 billion spend per annum (2002). This figure includes expenditures for the Winter Festivals and the Science Festival. This figure does not include direct expenditures for Parks and Sport.

Edinburgh and Lothians achieved an overall room occupancy of 73% in 2003, a high proportion. The proportion of total bednights accounted for by overseas visitors to Edinburgh is over 37%. This is a similar level to Manchester (which has far fewer bednights in total), but lower than comparable cities in continental Europe. In Amsterdam and Barcelona the high proportion of overseas bed nights is accounted for by the relative weaknesses of the domestic market. Edinburgh has also performed well relative to its competitors outside Europe. For example, between 2000 and 2002 total arrivals to Edinburgh grew by 18%, the same rate as Montreal over the same period.

Edinburgh International Airport processed 8m visitors in 2005. It has recently developed facilities with a significant £100 m investment. Visitors can also access Edinburgh from Glasgow Airport, which serves as the hub for the bulk of Scotland's international visitors. There have been some recent international route additions, including Continental's daily direct flight from New York, and the expectation is that this will grow in the coming years.

Edinburgh International Airport is also not a major European hub: Amsterdam, Paris, Frankfurt and London are the main link airports to Edinburgh. Low-cost airlines offer frequent services from London Heathrow and London Gatwick. Edinburgh has good rail and road links to other major UK cities. It is served by Leith Port, a commercial port that is set for further development. Three bus companies serve Edinburgh, the main one being Lothian Regional Transport. A new city tramway system is on course for introduction in 2010 at the cost of approximately £700 m of which £535 million of funds committed to date.

Edinburgh is host to fifteen national and international festivals, as well as several community and participative festivals. Eleven of these festivals are members of Festivals Edinburgh (the Association of Edinburgh Festivals). There are 251 festival days per year. No city in the world appears to rival the breadth and extent of festival activity in Edinburgh in August. Attendance is growing year after year and 2005 broke all records for total attendance.

The main driver for the cumulative rise in overall attendance is the success of the Fringe, which shows the spectacular increase in visitor attendance from 2000/1 to 2003/4 of 161% and the Book Festival's audience has grown by 120% over the five year period to 2005. The other large festivals such as the Edinburgh International Festival and Hogmanay show healthy incremental growth but nothing as spectacular as the Fringe.

In 1999, City of Edinburgh Council published 'Towards the New Enlightenment', a cultural policy for Edinburgh that remains the foremost expression of the city's cultural ambition. Individual art form strategies including one for Festivals are a strand of that policy, along with dance, education, film and multi-media, heritage, libraries, literature, music, science, theatre and visual arts and crafts. The Festivals strategy recognised the crucial role the Festivals play in the city's cultural, economic and social life and encourages the Festivals, in association with the City Council, Tourist Boards and The Audience Business to work closer together. In particular, the report emphasises working towards a coordinated approach to programming, brochure publication and advanced ticket sales; reviewing how to extend festivals into secondary events; identifying efficiencies; raising visitor profile throughout the year (particularly outside the summer); and encouraging collaboration among the Festivals themselves.

Scotland's cultural policy framework is undergoing a period of change. A Cultural Commission under the chair of James Boyle reported in June 2005 and made recommendations concerning the machinery of government, levels of funding, and cultural rights. The recommendations received a mixed reception by the public and the Scottish Executive, with broadly positive endorsement of the institutionalisation of cultural rights but less enthusiastic responses to proposals vis-a-vis funding levels and mechanisms. The Scottish Executive published its response to the Culture Review in January 2006 in Scotland's Culture. In future the national performing arts companies (National Theatre of Scotland, Royal Scottish National Orchestra, Scottish Ballet, Scottish Chamber Orchestra and Scottish Opera) will be funded directly by the Executive rather than by the Scottish Arts Council and the Scottish Arts Council will be amalgamated with Scottish Screen to form a new cultural development agency for Scotland called Creative Scotland. In Scotland's Culture the Minister for Tourism, Culture and Sport announced that "Festivals, however significant, are not national performing companies; as appropriate; some festivals will be supported in other ways such as through Event Scotland, Creative Scotland or by local authorities." The festivals are understandably concerned that they should not be disadvantaged by any change in the machinery of government.

Increasingly, Edinburgh's different cultural bodies, festivals amongst them, are working together. The City's Cultural Partnership was established in 2002, as recommended in 'Towards the New Enlightenment'. The Partnership is made up of many of Edinburgh's cultural stakeholders. It oversees the implementation of the City's Cultural Policy and related strategies, and also plays a significant role in community planning with the Edinburgh Partnership, an economic partnership. It is a meeting place in which cultural producers can share experience, consider future spending plans and represent the interests of Edinburgh's cultural sector.

This forum represents, for the first time, an on-going framework within which interested parties convene to discuss issues affecting the festivals collectively, and has done much to build greater trust and understanding between parties, and the possibility of a 'joined-up' approach to festival strategy. It has also stimulated the creation of Festivals Edinburgh.

The national arts body most directly involved in the funding of festivals in Scotland is the Scottish Arts Council, the restructuring of which was announced by the Scottish Executive in *Scotland's Culture*. It invests approximately £3 m per annum in festivals across Scotland. About £1.5m goes to the Edinburgh International Festival, Edinburgh International Book Festival and Imaginate (Bank of Scotland's Children's International Theatre Festival) reflecting the high artistic quality of the work and the large audiences they attract. Financial support is also given to the Edinburgh Mela, the Edinburgh Festival Fringe, Edinburgh Art Festival and the Edinburgh

International Jazz and Blues Festival. The Scottish Arts Council also supports smaller festivals in both urban and rural settings, ranging from £1,000 for the Butelive festival on the Isle of Bute to over £90,000 for the St Magnus Festival on Orkney, plus festivals run by enthusiastic volunteers, particularly for folk music, storytelling and drama. The Scottish Arts Council also oversees the distribution of National Lottery funding which has been utilised to develop the cultural infrastructure of Edinburgh used by the Festivals.

In Edinburgh Tourism Action Group's (ETAG) action plan 2004/2007, the group commits itself to support Edinburgh's year-round events programme and establish an Edinburgh Festivals and Events Unit to act as a facilitator to potential bodies wishing to bring festivals and events to Edinburgh. The Edinburgh Pass, which offers access to a wide range of tourist activities, is now a reality (but Edinburgh International Festival is the only festival represented in the client group that is currently participating in this promotion). ETAG is actively pursuing improvements in connectivity and marketing of direct significance to the Festivals, such as a comprehensive tourism signposting system, improved street dressing, improved transport infrastructure, benchmarking with competitor cities, and the website www.eventful-edinburgh.com, which is designed to stimulate interest in Scotland's events and festivals.

VisitScotland, the Scottish tourist board, recognises the importance of prestigious big events such as the Edinburgh Festivals for generating increased tourism to Scotland, and as a result more income. In 2003 it set up an events subsidiary, EventScotland, with the support of the Scottish Executive. It is overseen by a Ministerial Advisory Board chaired by the Minister for Tourism, Culture and Sport. Its aim is to make Scotland one of the world's foremost event destinations by 2015 with affordable, sustainable events that have strong community support. This will potentially involve the challenge of co-ordinating the timetables and programming of Scotland's festivals throughout the year to prevent them competing with one another for the same visitors. Its services include managing bid processes, helping develop business and marketing plans, offering advice on budget, sponsorship, merchandising, and TV rights and providing financial assistance. It should also be noted that many individual local authorities in Scotland have established their own events offices, whose positions are unclear in relation to EventScotland.

VisitScotland published a report based on a scenario planning exercise that articulates four possible futures for Scottish tourism in 2015: Dynamic Scotland; Weekend Gateway; Yesterday's Destination, and Exclusive Scotland. (Ian Yeoman, 'What do you want Scottish Tourism to look like in 2015?')

The newest entity working on strategic support issues is Festivals Edinburgh (the Association of Edinburgh Festivals), a hitherto informal networking body that is moving towards full incorporation, finalising a formal business plan and hiring staff. Festivals Edinburgh is one of only a few examples of such voluntary city-wide festival organisations in the cities that were included in this study.

Marketing and Ticketing
Festivals are responsible for their own marketing strategies and each festival has its own brand. Marketing delivery is generally organised in-house, although certain activities are outsourced to specialist agencies and companies. There is a Festival Marketing Group (FMG) that meets quarterly and is administered by The Audience Business, which runs the meetings as part of its service to subscribers. The FMG includes all Festivals Edinburgh members and will become a sub-group of Festivals Edinburgh, although the precise arrangements have yet to be finalised. However, it is not attended by the most senior management of the Festivals, but by marketing managers who may be temporary and, for certain festivals, not authorised to make strategic marketing decisions. The marketing budgets and extent of marketing activity varies considerably from festival to festival.

The Festivals have collaborated on producing the web portal with The Scotsman, and they are considering a joint electronic press pack. However, there are opportunities to collaborate on larger scale initiatives that could lower individual festival costs. The Festivals are considered a critical part of the City of Edinburgh Council's own tourism strategies and objectives. The Scottish Executive wants to harness the Festivals' existing profile into its international branding strategy for Scotland. VisitScotland and Edinburgh Tourism Action Group wants to see Edinburgh benefit from more short-term city breaks and to stimulate visits inspired by the Festivals ('Edinburgh is Europe's most Eventful city' was Visit Scotland Edinburgh's strap-line of 2004). The portal www.eventful-edinburgh.com is an embodiment of this strategy.

The Festivals have developed a portal (www.edinburghfestivals.com) run by Go-Edinburgh, an independent company owned by the International, Science, Book, Film, Children's Theatre and Fringe Festivals. This portal serves as an access point to all the Festival websites, but not every festival's website is equipped for on-line ticket sales. The Theatre Strategy (2005) published by CEC argued that a joint box office and audience development marketing site for the city's theatres, concert halls, festivals and other "cultural providers" should be produced.

The City of Edinburgh Council recently put out to tender a study to explore the feasibility of creating an on-line ticketing audience development/marketing portal that could be used by the Festivals and other cultural organisations in Edinburgh. In 2006, The Audience Business will be launching a new box office information system made by Purple 7. This will enable the Festivals to extract definitive box office data daily, and introduce sophisticated cross tabulations. The Festivals will be able to use accurate and thorough marketing intelligence of a kind it that has not hitherto been available

West Midlands

In 2004, Advantage West Midlands (AWM) launched the Visitor Economy Strategy for the West Midlands region. The strategy identified heritage and culture as key providers of local distinctiveness, and within that sector festivals and events were selected by Tourism West Midlands for further development through the creation of a specialist theme group.

Arts Council England, West Midlands is a partner in the Visitor Economy Strategy. To help realise the potential of arts festivals in relation to the visitor economy, a study was conducted investigating the extent to which the region's arts festivals were engaging with the visitor market as well as how, with what result, and with what economic effects.

It was believed at the outset that the cultural tourism potential of even higher profile and relatively better-funded festivals would remain unfulfilled unless strategies can be put in place to address current limitations.

This case study is a summary of the wide ranging findings and recommendations that resulted from this work, which was conducted between April 2004 and November 2005 and supported by findings from a separate report commissioned from The Tourism Company also in 2004.

<u>The rationale for arts festivals</u>

The research identified that art festivals exist for three primary reasons:

1. As a celebration of the arts and culture. They exist for artistic and creative celebration, either of an art form, a celebration of an artist or group of artists or some other form of cultural icon. They also provide special and additional opportunities to present artistic work which wouldn't otherwise be available in a locality
2. As an amenity for a locality or a community,
3. A contributor to improved quality of life as an attraction to attract visitors to, and raise the profile and reputation of, an area

The three purposes are not mutually exclusive: one usually follows from another but it is obvious that all arts festivals of any serious intent have the arts as their foundation – whether this is primarily for the benefit of local people or to attract visitors.

Festival directors were challenged to justify their festivals' existence on a broader front. Their responses fell into four main categories:

1. To switch people on to art by offering a short, intense burst of activity that achieves impact and concentrates attention
2. To enrich local people's quality of life by providing new artistic and other cultural opportunities in places where these don't currently exist
3. To provide an opportunity for celebration, and a focus for, and expression of, collective effort by the local community

4. To improve local quality of life. Of particular relevance to the visitor economy, and beyond their avowed passion for the arts, many festival directors cite a desire to improve local quality of life and put their city/town/village 'on the map' and to challenge negative perceptions where these exist

Despite these aspirations, there are limitations to the festivals' ability to realize their full potential in terms of attendance, both from the local community and wider afield, which are discussed below. Nonetheless, the current picture of visitor impact is impressive.

The implications of these findings are that, with greater support from relevant agencies, the impact already felt could make festivals a major player in the region's visitor marketing strategies.

Arts festivals' contribution to the visitor economy

A brief survey of available literature and information from independent sources relating to the contribution of festivals to visitor economies reveals a range of observations that echo the views of the festival directors:

Festivals offer depth and interest to a destination mix. The live performance element – particularly out on the streets – creates a buzz, a holiday atmosphere. They can animate otherwise sleepy, rather dull, places and leave visitors with a strong and positive impression. Because festivals are about collective celebration, they give visitors an insight into local life and culture. They offer something distinctively different via interesting and eclectic programmes, concentrated into intense periods – a valuable marketing commodity in the quest for competitive differential advantage.

Festival directors would be the first to admit that such benefits don't just happen naturally. A number of key conditions, explored below, have to be in place.

The destination management partnership (DMP) viewpoint

Festivals and events can make a very positive contribution to brand perceptions. Some DMPs report that local festivals can positively change people's perceptions.

Points raised by DMPs include:

- festivals and events are good at bringing people together and 'showing off the best of the place', projecting a vibrant, alive, and happening image, beyond the simple allure of interesting bricks and mortar
- festivals can play a role in raising destination profile through press coverage, positive word of mouth and presenting a diverse, culturally rich, live offering that complements mainstream fixed attractions
- festivals and events are good for local people, engendering local pride, sense of community and collective endeavour: in this, they closely mirror

the qualities that successful destination brands aspire to develop.

Estimate of visitor impact

While the research did not specifically set out to measure the economic impact of visitors to arts festivals, various data derived from box office analysis, from questionnaires and from audits with the festival directors has been collated and a number of methodologies were used to generate indicative figures for visitor value to the region.

The economic impact of visitors specifically generated by the 20 festivals included in the quantitative research for the report was at the very least £6m to £8m, though this is a conservative figure.

Because attendee data available for this research derives only from computer box office ticketed events, the researchers were unable to take into account visitors for free or other types of paid for events (eg ArtsFest, Festival at the Edge, the various visual arts festivals), nor for attendance at the ticketed events which do form part of the sample by patrons who buy tickets on the door, and whose data therefore evades capture. Additionally, a few festivals known to have significant impact in terms of visitor numbers were unable to be included in the self-completion survey that created the visitor profile.

To create an assumption of annual visitor value of £9m to £12m for all 30 festivals originally invited to take part in the study (those with sufficient regional profile, duration, nature of programming) may well be a significant understatement. In addition, it should be noted that this estimated visitor value generated by the existence of the festivals is above and beyond the spend of more local West Midlands residents.

Bearing in mind the relatively slender resources of most of these events, and the fact that they have an annual duration of just one to three weeks, this is an impressive performance. The research identifies that much potential exists to boost business and market performance via a number of initiatives that are outlined below.

Festival visitors have particularly high economic value: - Data collected for the study suggests that visitors to arts festivals have a much higher economic impact than other tourists, even other cultural tourists. Comparison with the figures for the UK Tourism Survey (UKTS) seems to demonstrate that visitors to festivals spend more and stay longer than other cultural tourists, ultimately making the very significant contribution to the local economy noted above.

The loyalty factor - In addition, visitors show more loyalty through repeat attendance than more locally based festival attendees: once a festival has attracted a visitor, that visitor has high potential to become a regular attendee in future years.

Visitor value - includes expenditure on tickets, food and drink, accommodation, souvenirs/gifts, transport etc. The data on visitor expenditure was developed from a self-completion survey of attendees at 15 festivals participating in the West Midlands research in 2004. Average reported spend per head per visit – which may amount to several days – was around £450. Box office data on visitor attendance was derived from nine festivals: Borderlines; Leamington; Lichfield; Ross on Wye; Shrewsbury Children's Bookfest; Shrewsbury Summer Season; Three Choirs; Warwick Festival; Worcester Festival.

Festivals which successfully attract high proportions of visitors

Five festivals that participated in the project demonstrated considerable success in attracting visitors, with over a quarter, and in some cases up to 80%, of bookings travelling more than 20 miles to events.

These were:
- Hay Festival
- Leamington Festival
- Bridgnorth Folk Festival
- English Haydn Festival
- Three Choirs (Gloucester)

A number of specific factors can be identified in relation to each of these festivals that partly explain their high proportions of visitors. However, a number of common characteristics have also been identified:

- well established: all five of these festivals have been running for a number of years
- well-defined product: all focus upon a niche or specialist product, in terms of their focus upon a specific art form. This inevitably means that they each have very clear target markets, in terms of devotees of the specific art form or subject area.
- Summer: these festivals take place between May and August, primarily across the summer months. A clear correlation can be identified with the fact that significant proportions of the visitors to Hay and Bridgnorth Folk festivals camp for the duration of the event but it is not clear whether the time of year is a clear influencing factor in visits to the other festivals, all of which focus upon classical music.
- Independent: these festivals are all independently run (ie not local authority) organisations that exist specifically to promote each festival.
- Ad hoc venues: events at all of these festivals tend to take place in non-art venues, such as churches, schools and outdoor locations, rather than within traditional, arts specific venues.

Critical success factors for festivals as visitor attractions
Some festivals are well adapted to life in the visitor economy – and others potentially could be, given the right sort of support and investment. The research suggests the following preconditions for festivals to be capable of competing within a regional, national, or international visitor market place:

Product:
A cogent, original, memorable well-differentiated (from competitors) product offering - The product is understood to extend beyond the core artistic offer: it embraces the venues and spaces in which events are presented; a compelling brand identity; a range of augmented products and services such as hospitality, customer service, a website that encourages repeat and year-round visits etc. Successful festivals are constantly experimenting with ways to improve visitor experiences in every possible way. Their ethos is based on exceeding expectation, surprising and delighting in every possible customer/ visitor interaction.

Place:
An interesting, attractive, culturally vibrant destination in its own right - Festivals are sometimes capable of attracting visitors to a destination on their own merit, yet it seems that the super-successful festivals in the UK and overseas take place in destinations of distinction in their own right. Thus, the destination becomes an integral part of the festival experience itself. The destination offers a compelling reason to attend the arts festival. The arts festival offers a compelling incentive to make that journey to destination x, amid an array of other competitor possibilities.

Alignment:
A good fit between the live arts experience and the physical environment rests upon a congruence of purpose, image and values between the two. The arts product accords with the qualities and values of the destination brand itself. In the minds of the customer/visitor, the arts offering and the ambience of the location seem appropriate and inevitable; one augments the enjoyment of the other.

Pride:
Great festivals are strongly of their own place and owned by local people. Yet community involvement is also critical to the visitor experience: visitors must be made to feel welcome, valued and looked after by local people and all sections of the community have to be involved in that effort. The quality of the visitor experience is only as good as the worst part of it. It is precisely the experience of diversity and difference found in diverse locations that is attractive to and valued by visitors. Festivals are not just a cultural experience, they are a social experience. The richness of that social experience rests largely upon the local community. Local distinctiveness is created by people.

Integration:
At a practical level, there is a joined up effort between festivals and destination marketing professionals. Festivals are actively included in promotional and other strategic marketing planning initiatives. Equally festivals make efforts to listen to and be flexible to the needs of destination management partnerships (DMPs). Issues of timing, branding, even product and programming choices are open for discussion and negotiation between arts provider and destination marketer. The delivery of the festival is an integral part of the destination brand offer; it conforms to destination brand values and aspires to deliver the highest standards of quality assurance in

terms of customer service. This kind of perfect synergy seems rare in practice, but good examples should be sought and emulated.

<u>Harnessing the potential contribution of festivals and addressing the limitations</u>

Some significant factors may limit the achievement of the full potential of festivals, the majority of which operate on a small financial base, with a tiny paid staff, and without the benefits of a year-round operation.

The DMPs consulted for the study put forward a set of desirable factors for creating a positive climate of success for festivals and events, namely that the sector should

- have a long term strategic view and consider festivals and events as part of the 'bigger picture' (e.g. Black Country Tourism has a 30 year plan which features festivals and events as a key strand)
- invest in festivals that have growth potential, particularly those which can plug gaps or address areas of weakness that hinder development.
- develop a critical mass of festivals and cultural events within a particular destination that together could make a significant impact on destination perceptions and the local visitor economy.
- build a strong, locally owned, home-grown offering which is perceived in the main to be as important as having externally high profile events.
- offer a flexible range of services and resources which are affordable (not just to the few with the biggest budgets) and geared to maximising their potential (which does not necessarily mean growing small ones into large ones).
- support festivals that reflect their locality and that can ideally express something of the authenticity of the place.
- muster tangible support from their local authority and media.
- identify a personal single point of contact at the DMP who is knowledgeable about their issues and concerns and therefore well trusted.
- adopt a collective, 'joined up' approach to festival marketing within the overall destination brand umbrella.
- evaluate the success of festivals in a long term context, considering not only the direct economic impact and destination brand strength, but also issues of community cohesion, local pride, and projection of cultural diversity.

<u>Caveat</u>

Not all festivals will have the same characteristics as those that already achieve a significant level of visitor impact, and many may never do so, for a variety of reasons. In broad terms, though, those that do achieve an above average level of visitor numbers exhibit these shared characteristics.

Destination management partnerships and festivals: a mismatch of needs and expectations

Most sub-regional destination management partnerships and similar providers operate as commercial enterprises in their own right. Most have a range of useful marketing support services available to the commercial visitor mainstream of local attractions, accommodation and other hospitality providers. However, many festivals comment that what is on offer can be inappropriate to their needs or beyond reach financially.

Small budgets militate against festivals being able to commit significant portions of expenditure to visitor-related promotion. They have to balance their expectations of potential audiences from a variety of sectors, and have a natural tendency to play safe and focus on 'doing their own thing' locally, particularly since many of the DMP-based marketing services are financially out of their reach.

There is a double bind at work here: because festivals generally do not buy in financially to the DMP, they are further marginalised, appearing to the DMP to be uninterested in marketing and promotional effort and, with no buying power over their DMPs, they have very limited influence on policy or direction. At the same time DMPs are most likely to become involved with arts and culture only with a view to how they may help realise their objectives in terms of visitor numbers. However, some others tend not to have a deep understanding of the potential of festivals and the market differentiation they can offer as part of their destination's brand, and therefore miss out on the valuable opportunities that their festivals present.

The conclusions to the West Midlands report propose ways out of this dilemma of mismatched needs and objectives in order to foster genuine understanding between the agents of arts and tourism, breaking a vicious circle in the process.

Conclusions

The study centred on testing a number of assumptions about needs to be satisfied as a prerequisite to achieving a successful synergy between arts festivals and the visitor market.

The field research and consultation confirmed the following beyond any doubt the need for:

- market intelligence relating specifically to customer service quality, brand presence, communications effectiveness, and e-marketing channels.
- synergy with DMPs and the need for a joined-up marketing approach linking arts and non-arts visitor attractions via destination marketing partnerships.
- marketing collaborations at all levels in order to raise profile and awareness of the festivals offer professional networking opportunities to

share ideas, expertise and best practice examples of culture and tourism working together and to combat isolation and parochialism.

- quality benchmarking: the need for competitive benchmarking and the development of an outward looking perspective, plus ongoing monitoring of economic impact.
- improved business and marketing planning skills and, linked to this, dedicated training and mentoring.
- specific resources to be made available to support exploitation of new markets.
- more interaction between festival and DMP: consultation with the region's DMPs has identified several measures which might succeed in building bridges, leading to more productive working relationships.
- better communication: local DMPs need to undertake proactive programmes to raise awareness of and enlist local festivals in their day to day work.
- dedicated coordination, management and focus: ideally, a dedicated officer should provide access to a range of dedicated services aiming to re-skill, raise awareness and stimulate collaborative activity.
- a clear structure: festivals often find it hard to engage with DMPs because there is no structure for them to work within.

West Midlands - The way forward

To support the development of visitor markets by arts festivals, and indeed the wider arts sector, the following shared initiatives between Arts Council England and Culture West Midlands are proposed as a starting point:

1. Investigation of the outcomes and benefits of concentrated investment by the East Midlands Development Agency into a developmental initiative working with selected arts festivals in collaboration with Arts Council East Midlands
2. Creation of a handbook or other similar resource for destination management partnerships: culture and tourism working together
3. Roadshows to be created to visit each DMP/tourism office in turn to talk through issues of the handbook, to make the issue 'live' and stimulate further discussion, awareness and debate
4. Festivals should be helped via a toolkit to understand how they can get involved in tourism networks and the key issues for destination managers. The toolkit should be regarded as an ongoing process of learning and growth on both sides. Drawing on the principles of Action Learning the process might involve structured training, networking, consultation and action research
5. Creation of sub-regional 'festivals, arts and events forums' to meet regularly with their local DMP/tourism office in order that a shared agenda can be developed and pursued, overcoming marginalisation and fostering mutual understanding
6. That the example of the city of Aarhus in Denmark be investigated as a model of good practice of culture and tourism working productively together
7. Re-examine the potential for the sub-regional Arts Marketing

Development Coordinators' proposal developed by Audiences Central, currently with Tourism West Midlands, to deliver in large part against the needs identified by this study.

8. A joint culture and tourism conference to be convened, coordinated by Culture West Midlands working with Tourism West Midlands. This would be scheduled to take place in about two years time, to allow for sufficient growth of awareness as a result of the impact of other initiatives outlined here
9. Audiences Central and the Regional Centre for Tourism Business Support to collaborate on delivery of marketing and business support needs for festivals.

The festivals whose audience data formed part of this study, and who also gave invaluable information on business practice were:

Festivals funding policies

Arts Council England, West Midlands currently provides revenue support only to those festivals which are key to an art form's infrastructure (such as Ledbury Poetry Festival or Fierce!), or those which undertake significant commissions and provide year round impact. The West Midlands role in relation to all other festivals, where it exists, is a minor one, via Grants for the arts funding programme, where consideration is given to one-off funding for activities of a significantly developmental nature. Such festivals are primarily of benefit to their own community and therefore funds for year on year activity should be sourced locally.

Advantage West Midlands (AWM) is one of the nine Regional Development Agencies established by government in 1999, to be "strategic drivers of economic development and regeneration". AWM published the Regional Visitor Economy Strategy (RVES) in April 2004. Among other initiatives, the RVES identified the theme of 'Festivals and Events' – an area of current strength in regional tourism, with additional potential to grow.

The 'Festivals and Events Theme Group', made up of a wide cross-section of public and private sector events practitioners, has been operating since summer 2004. The Group has taken the view that this Theme Group should not seek to offer a fund, to which individual festivals and events could bid, because of the large number in the region. Instead it has developed three proposals, which are hoped will be available, and helpful, to all festivals and events throughout the region:

1. the collation of a series of strong and emotive images from various festivals across the region. This project started summer 2005 andl finished summer 2006.
2. the production of a 'toolkit', which will enable organisers to assess the economic impact of their event. This procedure can be either self-administered, or supported by an expert third party. The application for this toolkit is currently (March 2006) progressing through the AWM assessment process.
3. the development of a website for festival organisers, which will be an

updated, comprehensive source of business, funding and legislative information. Likewise, at March 2006, this application is progressing through the AWM assessment process

Nevertheless, the Agency has given financial support in the past to certain arts events. These include:

- Elgar International Festival 2004
- Birmingham Urban Fusion Programme 2006

In order to clarify the criteria on which AWM should base any future decisions for supporting events, the Agency has decided to develop an AWM events strategy/policy.

It is likely that this proposed AWM events policy will emphasise the importance of the following criteria, for an event to be able to contribute to the objectives of AWM:

- national or international significance
- high economic impact high media interest and impact.

Brighton

The last 10 to 15 years in Brighton and Hove has seen a consistent growth in the profile and investment in the cultural sector, plus a number of culturally-led capital developments. Against this backdrop, the recognition of the significance of the creative industries and the allocation of specific support to those industries has helped to develop the sector. It is now one of the key employment sectors for the city accounting for 20 per cent of businesses and more than 10 per cent of employment.

Brighton and Hove is the creative powerhouse of the South East region. Its strength lies in its combination of people and place: it is a city of contrasts. The city has unique architectural heritage and cutting edge contemporary culture, art and entertainment, countryside and cosmopolitan seafront, and rich and poor neighbourhoods and communities.

Brighton and Hove is recognised as a creative hub on the South Coast, hosting the biggest cluster of creative industries businesses and organisations in the South East outside London. In 2000, approximately 1,500 creative businesses were identified. This revealed that almost one in five businesses in the city were from the creative economy. Figures from 2007 suggested that total employment in the creative industries was estimated to be 15,800 – 10.7 per cent of the city’s working population in 2007.

The city is cosmopolitan: it is socially, culturally and creatively diverse with a unique social history with long artistic traditions. There are two universities with international reputations for excellence and demonstrable local commitment to the success of the city’s economy and increasing opportunities for residents.

There are more than 50 festivals each year, ranging from critically-renowned artform festivals to neighbourhood and community of interest festivals. This includes the Brighton Festival held each year in May. This is the largest arts festival in England and, with its umbrella ‘festivals within festival’, contributes more than £20 million to the local economy.

It is home to creative practitioners who forge new directions and has a reputation for networking, flexible working, innovation and collaboration. This attracts global giants in new technology and media: the city is the ‘real world’ European home of Linden Lab – the inventors of ‘Second Life’ and Disney’s ‘The Penguin Club’.

It is also home to the annual Develop Conference – the leading European games development expo. Brighton and Hove is ranked at number five in the national ‘Sharpie Index of Creative Cities’, published in 2008, which measures the creativity of individuals and businesses. It was recently named as one of five potential ‘supercities of the future’ in the HSBC-commissioned ‘Supercities Report’.

Brighton and Hove's Museum Service ranks in the top 10 performing unitary authorities in the country, and is a regional hub for museums. Its Library Services rank in the top five, with Children's Library Services ranking as the second best in the whole country.

In terms of the new national indicator NI11 – Engagement in the Arts, Brighton and Hove is the top ranked authority in the country outside of the London Boroughs, and the highest in the South East region. There are eight million visitors a year and the tourism industry contributes more than £400 million to the local economy.

The city is well known for its vibrant grassroots nightlife, a unique cabaret and theatre scene, a music scene which numbers 1,000 bands and club nights that cater for every taste. There are more than 50 venues – including theatres, performance spaces, pubs and clubs – mostly well within walking distance of each other.

There are small-scale contemporary art galleries, 1,000 Open House artists and a growing public art portfolio finding a place throughout and across the city. There is also a diverse ethnic and bohemian independent retail offer particularly in North Laine and The Lanes.

There is excellent cross-sector partnership working supporting the development of culture and cultural representation on both the local strategic partnership (LSP) and the economic partnership. It underlines the importance the city places on culture. Successful models for stimulating the cultural sector have grown here. The Brighton and Hove Arts Commission and Creative Brighton both provide independent and arms-length sector-led vision, advocacy and dialogue while creating a solid base for expanding infrastructure.

Partners have included:

- Arts Council England.
- Brighton and Hove Arts Commission.
- Brighton Media Centre.
- Brighton Music Network.
- Creative Brighton.
- University of Sussex.
- University of Brighton.
- Wired Sussex.
- Brighton and Hove Economic Partnership.
- South East of England Development Agency (SEEDA).

<u>Historical background</u>

The success of the creative industries sector is undoubtedly a result of the levels of investment in culture that the city has seen over the last 10 to 15 years. From the 1990s onwards, forward planning and investment in the seafront and cultural assets has revitalised the public face of the city and the infrastructure of its cultural offer.

The creation of the city's Cultural Quarter, comprising the Royal Pavilion and its estate, with significant government and lottery-funded refurbishment of Brighton Museum and the Brighton Dome venues, also involved the new Jubilee Library – a contemporary building in a contemporary new civic square with a regular events programme – and New Road, the linking road in the Cultural Quarter recently re-designed by the Danish architects Gehl and awarded a Civic Trust Award.

Other significant investments included Single Regeneration Fund funding for Phoenix – an artist-led project creating around 100 studios plus an art gallery, Fabrica – a city centre art gallery in a converted church, the Brighton Media Centre, initially housing Lighthouse – a digital media production, exhibition and training facility which has now relocated

This context created a city where graduate retention grew even higher, creative companies both started in the city and located themselves in Brighton; the wider cultural offer being an essential part of the mix for the creative industries sector to thrive.

Building the information base and profile of creative industries in Brighton:- In 2000, shortly after Brighton and Hove made its successful bid for city status, an audit of the creative industries in the city was commissioned for the first time.

The process of bidding for city status, had led to an informal analysis of the city's strengths that clearly indicated that culture and creative industries were a clear focus. The audit then confirmed this and created a baseline of statistics that was used to lobby for resources and support to the sector, such as the establishment of a dedicated post within the local authority.

In addition, Creative Brighton was established – an independent partnership group for the creative industries sector. Most recently, it has commissioned the Creative Industries Workspace Study which provides both ambitious targets and potential routemaps for growth.

Providing access to advice and support: -Creative businesses historically have found public, commercial and professional agencies in Brighton and Hove, including the council, difficult to access for suitable support.

The establishment of a Creative Industries post has helped this, creating a clear point of contact for creative businesses. Free business clinics have been now been designed to provide local enterprises with a face-to-face review with an experienced Business Link adviser. Creative Brighton has also endorsed a business guide.

Over the last five years, the creative industries sector has grown by nearly five per cent, making it the fastest growing business sub-sector. The creative industries are an acknowledged key employment sector, both in local and regional economic strategies. The Creative Industries Workspace Strategy findings have been incorporated to the local development framework (LDF), a key planning document governing the next 20 years

The Festivals

Brighton Festival is a festival of broad popular appeal. Its success is built upon the variety and range of events, created through a strong artistic vision and emphasis on quality. The Festival is hugely popular with the City's residents, but also attracts significant numbers of UK and international visitors into the City for its free and ticketed events. The festival programme is managed by a Trust also responsible for The Dome, The Brighton Dome and Festival Ltd. (bdfl) with an annual turnover of £7million in 2008/09; bdfl generates 65% of its income from its own activities and receives the remaining 35% in core funding support from Arts Council England South East and Brighton & Hove City Council.

There were over 430,000 attendances at Brighton Festival and Fringe events 197,000 attendances at free events in 2008; 69% of the audience come from Brighton and Hove 31% are visitors to the city.

In addition to spending money on tickets Brighton Festival attendees, combined going to Festival events with having a meal or a drink, staying in hotels, shopping, etc. at festival time. £20 million was added to the City's economy in 2004, over £1 million spent on tickets, local businesses invested over £400K in the Festival, 'Open Houses' artists received over £840K in sales. Public Sector support of £1.1 million brought a return on investment of nearly £20 million into the City's economy in 2004, a return of over 17 times on their initial contribution

Brighton Festival is also a positive force in raising awareness of arts and culture, it has helped to build Brighton and Hove's profile, and contributes to the City's quality of life and its economy. The Festival brings some of the best creative minds to the region, stimulating local talent, helping the City face increasing competition, and making Brighton a major magnet for the creative industries. £1 million of press coverage was generated by the 2004 Brighton Festival It has been responsible for building talent and creating new work It reinforces the unique eclectic mix that is Brighton, blending the contemporary with heritage, architecture and community It has become a respected leader amongst national and international festivals

Manchester
The Manchester International Festival drives economic development by substantially raising the profile of Manchester, draws in tourism and attracts inward investment by positioning the City as an international centre for culture. The 2009 Festival achieved an estimated economic impact value of £35.7 m.

Manchester's growth from a market town into a major industrial centre took place in the 18th century; its eminence has traditionally been founded on large-scale industry. Cultural highlights include the recently-expanded Manchester Art Gallery, the Lowry Centre and Cube, as well as several museums of national significance. In 2001 the City of Manchester had a population of 393,000, while Greater Manchester had population of 2.5m. Manchester's textile and manufacturing industries remain a major part of the city's economy, although other industries and retail are also significant. Many overseas companies and 80 of the FTSE 100 have branches in Manchester; the city has over 150 conference venues reflecting its significance as a conference destination. GDP per capita in 2003 was £14,489. 24% of the population aged 16-74 is educated at university level (2003).

In the 2003 European Innovation Scoreboard, the North West of England received a near-identical score to other European regions included in this study. 3.2 patents were granted per 100,000 people in the North West of England in 2001. In 2003-4, 57% of adults in the north west of England had accessed the internet in the previous three months. Unemployment rates in Manchester in 2001 were 9.1%, higher than the UK average. The City of Manchester's budget for 'Culture and Heritage' accounts for 1.7% of the total budget.

Manchester Airport is 10 miles from the city centre and processed 19.9m passengers in 2003, placing it 11th in Europe in 2003 and 46th in the world in 2004. It serves 95 airlines and reaches 180 destinations. There are no available data on quality of life, visitor numbers, tourist capacity and expenditure. Manchester has strong rail and air links to the rest of the UK, with a train to London taking 140 minutes. It has trams and buses for public transport. Major redevelopment of the south of Manchester is underway.

Manchester's Festival's
Greater Manchester hosts approximately 21 major festivals during the year (134 festival days). The key festival season is between July and October with the most festive months being July and October. The oldest and biggest are the Manchester Pride and the Manchester Comedy Festival. The Manchester International Festival, modelled after the Edinburgh International Festival began in 2007. The main competitors to Edinburgh's festivals are Manchester Comedy Festival (comedy elements of the Edinburgh Festival Fringe), the Manchester Jazz festival (Edinburgh International Jazz and Blues Festival) and the Manchester International Festival (Edinburgh International Festival).

The Manchester Comedy Festival aims to be the most recognised UK comedy festival outside Edinburgh. It seeks to promote comedy and encourage the perception of comedy as an art form. Founded in 2001, the festival is held during October for 12 days in 24 venues (2004). In 2004, 17,000 people attended, and average spend per audience member was £10. In 2005, 68 performances were staged. Successful festivals are seen by Manchester City Council as a way of improving the city's brand and tourist appeal. It sees the comedy festivals in Brighton, Glasgow, Leicester and Liverpool as its UK peers.

The Manchester Jazz Festival aims to present exciting, innovative contemporary jazz. Founded in 1996, the festival is held during July for nine days. In 2005 it used nine venues, and 51 bands attended, putting on the same number of performances. Most performances are free.

The Manchester International Festival began in 2007, running from 28th June until mid-July in both indoor and outdoor venues, staging approximately 15 core productions as well as a range of other events. The festival is intended to help secure Manchester's reputation as a world-class cultural city; encourage Manchester's talent and involvement from many communities; and drive the city's economy. The MIF aims to involve a broad spectrum of work, all of which will be commissioned by the festival. If successful, it will become a biennial event. A report by Cambridge Policy Consultants predicted that the festival would attract 160,000 visitors in the first year and 270,000 in subsequent years, bringing in £34m in economic benefit. (The planned structure of the festival has changed significantly since that report, however.) The MIF sees the New Haven, Connecticut International Festival of Arts and Ideas and the Adelaide Festival of Arts as its potential peers. It also sees the Edinburgh International Festival as a peer, but aims to be more focussed on contemporary rather than classical arts.

Festival Strategy
The Manchester International Festival will not be prepared to collaborate with other festivals on production unless it presents the world premiere of any given show; it is, however, looking for international venues with which to collaborate. The Manchester Comedy Festival has not collaborated with any other festivals. Festival organisers emphasise the excellent support offered by Manchester City Council, which sees major festivals as a way to raise the international profile of the City's brand. The City's tourism strategy emphasises the contribution of 'events with consistent appeal that are repeated on an annual basis' to raising visitor numbers. Leaders in festivals and the arts are encouraged by the City Council to meet and discuss ideas. The Council is able to have significant influence over festivals because it is viewed positively by them, and also because many of the festivals are young and still strongly dependent on Council support.

Festivals are a policy tool for regional government. There is no specific budget line item for festivals in Manchester City Council's budget. As a municipal concern, festivals are high on the local government's agenda.

Administration
The Manchester Comedy Festival is organised by The Comedy Store. It has a Director and a Producer/Coordinator, who liaise with representatives from the different venues. The office staff at The Comedy Store runs marketing and administration for the festival. The festival receives funding from Manchester City Council, as well as private sponsorship from companies including smile.co.uk and Holsten. Up to 2004, the City Council was the principal funder, but in 2005 funding from smile.co.uk matched that from the Council. Individual comedy awards are privately sponsored. Around two-thirds of expenditure is on marketing and administration. The Festival keeps the precise breakdown of income and expenditure confidential.

The Manchester Jazz Festival receives funding from the Arts Council of England, Manchester City Council and private sponsors, including Starbucks. The Manchester International Festival currently has a six person board; a director; three senior management staff: an executive, communications and programming director; and administration staff. The budget for 2005-6, 2006-7 and the first half of 2007-8 until after the first festival is £5m of which £2m is from the City Council; £0.65m from the North West Development Agency; £0.5m from the Arts Council of England for preliminary events in the lead-up to the festival; £0.5m from other public sector; £1.35m from private sources.

Marketing & Ticketing
www.vistitmanchester.com, Manchester's official tourist site, provides information on specific festivals, and has links to individual festival websites, but does not provide information on individual festival events. The site www.manchesteronline.co.uk also provides information on some festivals. Neither website offers online ticketing. There is no dedicated festival website. Tickets for some events can be acquired through ticketing websites, such as www.ticketline.co.uk. Otherwise tickets are available by telephone or by visiting festival and venue box offices in person. There is not a single overall festival agency selling tickets or coordinating festival marketing. The festivals are individually branded. The festivals are encouraged by the Council to develop informal supportive relationships with one another, but do not share overheads. Some festivals are run by organisations with year-round roles, enabling greater efficiency of expenditure.

Amsterdam
Amsterdam came to European eminence in the 17th century when it became a thriving commercial and cultural centre. It remains a socially progressive place in keeping with its politically liberal origins. Its economy is based on logistics, tourism, IT and engineering. It is a significant financial centre and an important congress city. Cultural highlights include the Rijksmuseum, the Van Gogh Museum, Rembrandt's House Museum and the beautiful canals and buildings of the seventeenth-century quarter. It boasts and hosts 16,000 concerts and theatrical performances a year.

There are presently 740,000 inhabitants in the city and 1.5m in metropolitan Amsterdam. In 2003, GDP per capita was £26,245, and the unemployment rate was 6.3%. 35% of the population is educated at college or university level. In the 2003 European Innovation Scoreboard, Noord-Holland received a near-identical score to other European regions included in this study. Amsterdam was rated 12th city of a selection of 215 cities in the world in Mercer Human Resources's Annual Quality of Life Survey 2005. According to *The Economist's* Hardship Rating, the city is the 19th easiest city to live in of 150 selected worldwide cities. Culture makes up approximately 4% of the municipal budget of Amsterdam. Total expenditure on culture per inhabitant of Amsterdam in 2002 was €236. Cultural expenditure per inhabitant of the Netherlands in 2001 was considerably lower at €148.

Amsterdam's Schipol Airport is 15 minutes from the city centre and processed 40m passengers in 2003, placing it 9th in the world and 4th in Europe. As of 2005, it serves 90 airlines and lands 3,800 incoming flights per week, reaching 250 destinations. The city attracts 24m visitors per annum of which 8m (33%) are overnight stays and 16m are day visitors. Tourist capacity is 38,200 hotel beds. The economic contribution of tourism to Amsterdam is estimated at €2.9 billion. Amsterdam has the 6th largest port in Europe and has strong rail and air links to the rest of Europe, in particular Germany, Belgium, Switzerland, Great Britain and Scandinavia. It has trams, metro, bus and boats for public transport. Large development projects include office and accommodation at Zuidas and IJBurg (27,000 new homes in all), a Science Park, new metro and transport lines, and the Teleport, a commercial IT hub.

Festival Offer
Amsterdam hosts approximately 18 significant festivals during the year (177 festival days). The key festival season is between June and October with the most festive month being June, with July and August close behind. The oldest and biggest are the Holland Festival, Queen's Day and Kwakoe, the country's largest multicultural festival with 1m visitors. The main competitors to Edinburgh's festivals are Holland Festival (Edinburgh International Festival), the Uimarkt (Edinburgh International Festival) and the Amsterdam Roots Festival (Edinburgh International Jazz and Blues Festival).

The Holland Festival aims to present topical and innovative achievements in the dramatic arts - music, opera, theatre, dance - in classical and experimental ways. It seeks to offer an international programme that challenges boundaries between 'high' and 'low' culture. It is 58 years old and is held during June for 26 days in 16 venues. In 2005 it was attended by 50,000 people. It put on 36 productions and 71 performances in 2005. In 2005 it hit 80% capacity.

The Uitmarkt aims to generate publicity for and interest in Amsterdam's cultural offering and Dutch culture generally. It signals the beginning of the cultural year. It is aimed at a Dutch audience. It is 27 years old and is held during August for three days. Each year it is attended by around 500,000 people at 30 stages indoor and outdoor. Its purported benefits are increasing paid attendance at cultural events in Amsterdam throughout the year (no study has been done to prove this), and raising cultural awareness amongst non-traditional groups, such as youth and immigrants, again with the aim of increasing ticket sales.

The Amsterdam Roots Festival aims to present new developments within world music. In its present form it is eight years old although it goes back 22 years. It is held in June over nine days. It has two parts: Roots Open Air, a free event which takes place over one day in a park and involves seven stages; and Roots Podia which involves five venues over eight days. It put on 60 concerts in 2004 and was attended by 55,000 people. 50,000 tickets were free. It purports to provide opportunities for cultural exchange and to give room to new young talent.

Festival Strategies
There is not a city-based festival taskforce responsible for pushing the agenda of the festivals and there is little sign of increasing cooperation and coordination between Amsterdam festivals following the collaboration between The Holland Festival and the Amsterdam Roots Festival. Until 2004 the Roots Festival collaborated with the Holland Festival, but they now collaborate only on individual events. The Holland Festival wishes 'to get in touch with foreign festivals' who want to work together. Amsterdam's Council does have a special strategy for the future of Amsterdam's festivals going forward. Informal supportive relationships exist between festivals, but festivals do not share overheads costs.

Out of the various special funds and foundations for the arts in the Netherlands, there is no specific fund for festivals and events, nor do festivals have a designated line item in the Ministry of Education, Culture and Science's budget. Festivals in Amsterdam are exploited by local tourist agencies, due to the influx of tourist to these activities.

Administration
The Holland Festival is run by an artistic director. The City of Amsterdam and the Ministry of Education, Culture and Sciences provide the majority of funding. (The festival received €694,000 in public subsidy in 2005) It is also supported by private sponsors. Breakdown on income and expenses are not available at present. Public subsidies have decreased from a peak of €2m in 2000.

The Uitmarkt festival is run by a director appointed by the Uitburo, the collective marketing organisation for the Amsterdam's cultural sector. It has a total budget of €1m, of which 20% is provided by the City of Amsterdam and the rest by private sponsorship. Earned income is zero as all events are free. Artists perform for free.

The Amsterdam Roots Festival is run by a freelance production company, and marketing managers are employed part-time for five months each year. A part-time assistant and an intern complete the staff. The Roots Festival's income is 58% public subsidy, 13% private subsidy and 29% earned income. 75% of its operating budget is spent on programming, 8% on marketing, and 17% on overheads. It is co-founder of the European Forum of Worldwide Music Festivals, a network of 48 independent musical festivals from 23 European countries.

Marketing & Ticketing

www.uitboro.nl provides a single information and ticketing portal in Dutch for all cultural activity in Holland and links users to festival sites. There is, however, no dedicated festival website. Uitboro.nl coordinates with the Amsterdam Tourist Board and the Amsterdam Museum Marketing Group. English visitors to Uitboro are linked to Amsterdam city's "I Amsterdam" site, which has a specific festivals section, and information on individual festival events. Tickets for festivals can be acquired online and at selected box office locations across the city. The Netherlands Tourist site (www.holland.com) has information about each festival but it does not include the option to purchase tickets online. The "I Amsterdam" card does not provide entry to festivals. There is not a single agency set up to coordinate festival delivery and marketing. Each festival is individually branded.

Newcastle/Gateshead
The Tyneside cities developed in the 19th century as a major shipbuilding, coal producing and heavy engineering centre. Following a century of decline Newcastle and Gateshead have staged a remarkable regeneration using prestigious cultural projects. Cultural highlights include BALTIC, The Sage, the Laing Art Gallery and the Angel of the North; there has been impressive investment in new cultural infrastructure in recent years. Newcastle's economic fortunes are improving: office and retail employment now play a large part in Newcastle's economy, while conferences are a rapidly expanding market worth £75m per annum.

Newcastle and Gateshead's respective populations in 2001 were 260,000 and 191,000, giving a combined population of 451,000. GDP per capita for Newcastle in 2003 was £14,077. 25.1% of those in Newcastle aged 16-74 had a university level qualification in 2001. It has an unexceptional innovation rating: 1.8 patents per 100,000 population were granted in North East England in 2001, which is almost identical to other European regions included in this study. In 2003-4, 43% of adults in the North East had accessed the internet in the previous three months. The city has an unemployment rate of 8.4% (2001), which is above average for the UK. No data on quality of life are available. Total expenditure on culture per inhabitant of Gateshead in 2005-6 was £74.94.

Newcastle International Airport is seven miles from the city of Newcastle and 23 minutes from the city centre by metro. Its airport is relatively small by European standards: it processed 4m passengers in 2003, placing it 60th in Europe. It serves 31 airlines that fly to 85 destinations. The Port of Tyne serves 800,000 passengers per year, with regular services to the Netherlands, Norway and Sweden. It is estimated that in 2003 Newcastle received 2.5m visitors, with 79% from the UK. There are 5,000 hotel bedrooms in Newcastle/Gateshead. Visitors to Newcastle contributed £450m to the local economy (2003). The area has strong rail and air links to the rest of the UK, with a train to London taking 3 hours. It has metro and bus for public transport.

Festival Offer
The Culture-10 initiative was launched in 2009 to build on the cultural programmes of the previous years. There are four main programme areas:

- Creating international festivals and events
- Bringing blockbuster exhibitions and commissions
- Unleashing creativity in communities
- Marketing cultural activity on a scale never seen before.

However the current economic situation has reduced the overall budget contribution from the regional RDA by half for 2010, from £5 to £2.5mn.

In 2005, festivals were grouped together according to four broad themes, lasting between six weeks and a year, which make up '2005 Alive'. The Festival of Rivers and The Sea, between 21st June and 7th August, formed a focus in 2005. The main comparators to Edinburgh's festivals are the

Newcastle Science Festival (Edinburgh International Science Festival), and the Newcastle Mela (Edinburgh Mela).

Newcastle Science Festival aims to bring science to as many people as possible, and to build itself into a nationally recognised event. It is two years old and is held during March for 11 days. The programme includes live shows and demonstrations, exhibitions, lectures and performances exploring current issues. There is a Schools programme with hands-on curriculum-linked events. The festival was attended by 41,000 people in 2005, up from 20,000 in 2004. There are both free and ticketed events. In 2005 there were 58 events in 20 venues, a significant increase from 26 events in ten venues in 2004. Its purported benefits are stimulating debate on social and ethical aspects of science; marketing science, science careers and the study of science to young people; and promoting awareness of the science and technology sector in the region. The festival sees Cheltenham Science Festival as its model, with Edinburgh International Science Festival also considered a peer, due to its proximity.

The Newcastle Mela is a multi-cultural celebration. It is held during August for two days. Its programme involves a varied range of Asian art forms, including art, drama and a varied range of musical styles.

The Source of the Tyne Festival aims to provide an event for the population of the isolated and rural area of Kielder and to draw visitors to the area. 2005 was its first year, held for four days in July, although a smaller festival was held in Kielder in 2004. Subsequent events depend on an assessment of the 2005 festival. It appears that there will be an annual or biennial event held in the area. This year it was held during July for four days. The 2005 programme involved a range of outdoor activities, including bicycling, a walking maze, and dramatic performances. The headline event was a water-based theatrical performance, Treibgut, on Kielder reservoir, occurring on each of the festival's four nights. While overall visitor data is not available, Treibgut had a total audience of roughly 2,600, reaching 80% capacity. Entry to this event was free for residents of local villages, but was otherwise ticketed. There were a total of 30 different events in 19 venues of which roughly half were outdoors. The festival views itself as unique.

Festival Strategies

The Culture-10 initiative's "2005 Alive" event aimed to increase the diversity and scale of Newcastle's festival offering. There are signs of increased cooperation and coordination between Newcastle/Gateshead's festivals. The Source of the Tyne Festival began in 2005 as a result of money provided by the Newcastle/Gateshead Initiative. Local government has an integrated tourism strategy which involves the use of festivals to increase Newcastle/Gateshead's appeal as a tourist destination.

Festivals are a policy focus for Newcastle/Gateshead's local government. While there is no specific organisation aimed at promoting festivals, they are regarded as a significant part of Newcastle/Gateshead's rebranding and tourism strategy. As they are viewed as a potential revenue stream, festivals in Newcastle/Gateshead are exploited by local tourist agencies. In terms of marketing, Newcastle/Gateshead's festivals might offer models of best practice, but it is too early to judge their success and hence conclude if their administration and revenue generation abilities are worthy of note.

Administration

The Newcastle Science Festival is run by a director, Linda Conlon, the director of the Life Science Centre. There is also a festival coordinator on the Life Science Centre staff. Life is part of a steering committee for the festival, along with Tyne and Wear Museums; the Policy, Ethics and Life Sciences Research Centre; Newcastle/Gateshead Initiative; Newcastle City Council and Newcastle University. This steering committee makes decisions on programming, dates, marketing and advertising strategy and the allocation of funds. The festival's income is entirely public and earned. In 2005, its public funding consisted of £80,000 from the Regional Development Agency and £7,500 from Tyne and Wear Museums. It budgeted £30,000 on marketing in 2005. In the future, it hopes to introduce private sponsorship for keynote speakers.

The Source of the Tyne Festival was organised by the Kielder Partnership, made up of Northumbria Water, the Forestry Commission, the National Park and the County and District Councils. There were approximately eight staff in the organising group, with a total of 20 involved. Northumbria Water donated staff time for festival marketing. Its total funding was £196,200, of which £165,200 was from the Newcastle/Gateshead Initiative, £10,000 from local councils and £10,000 from Northumbria Water. The vast bulk of funding, therefore, is public. Earned income is not yet known. Any surplus will be used on future events. It budgets 77% on programming, 5% on marketing, and 17% on overheads.

Marketing & Ticketing

www.visitnewcastlegateshead.com, the official tourist website for Newcastle and Gateshead gives information on specific festivals, has links to individual festival websites, and also provides information on individual festival events. It defines Newcastle and Gateshead as a single brand, and, through the 2005 Alive initiative, promotes a large proportion of the cities' cultural and sporting offering – such as arts exhibitions and one-off performances – as four broad envelope festivals. Tickets are not available through the site but a search facility for the 2005 A live events is. For some events tickets can be acquired through ticketing websites, such as www.ticketline.co.uk.

There is not a single agency selling festival tickets. The 2005 Alive event has been organised as part of Culture-10, which is a ten-year programme of cultural development. The four envelope festivals are to an extent cosmetic but serve to raise Newcastle/Gateshead's profile as a festival and cultural city. Tourism North East's 2005-10 strategy states that '[the area] will implement integrated themed campaigns to increase the profile of our…dispersed attractions, outdoor pursuits, events and festivals.' Some festivals have cooperative relationships with one-another: the Source of the Tyne Festival, for example, cooperated with the Festival of the Coast and music festivals, also involved in the Festival of the Rivers and Sea, for marketing purposes.

San Francisco
San Francisco was established in 1847 and grew rapidly with the California gold rush. It became a centre for alternative thought in the second half of the 20th century, and served as the centre of the dot-com boom of the 1990s. Cultural highlights include San Francisco Museum of Modern Art, San Francisco Opera and the Haight-Ashbury district home of the Beat poet movement. It is the banking and financial centre of the U.S. West Coast, home of the Pacific Exchange, and is 40 miles from Silicon Valley.

San Francisco's population is 744k (city – 7.5m MSA). GDP per capita income in 2003 was US$34,556. 48% of the population aged 25 and over has a university degree or higher (2001), an extremely high proportion. 53.9 patents per 100,000 population were granted in California in 2001. Strangely for the internet centre of the world, no data on internet use are available although the city is moving towards providing blanket free internet access to all residents. San Francisco has an estimated unemployment rate of 7.0% (2001). The city was rated 25th city in the world in Mercer Human Resources Annual Quality of Life Survey 2005. Culture makes up approximately 4% of the municipal budget of San Francisco.

San Francisco Airport is 15 miles from the city centre and processed 29m passengers in 2003, placing it 22nd in the world. 7.6m of these passengers were international. San Francisco's port serves 200,000 passengers per year. and the city has road and air links to the rest of the US. The number of visitors to San Francisco in 2004 was 15.1m, with these visitors spending $6.73b. No data are available on tourist capacity. It has streetcars, light rail and bus for public transport. Regeneration of the city's derelict Mission Bay area is being carried out, providing new housing and a new University; the San Francisco Redevelopment Agency created and preserved 9,000 homes between 1996 and 2003. There are preliminary plans for a new venue in the Civic Centre area, with 15-20,000 seats.

Festival Offer
San Francisco hosts approximately 38 significant festivals during the year. There are 264 festival days per year. The key festival season is September-October; outside these months the festival offer is relatively uniform over the year. The main comparators to Edinburgh's festivals are the San Francisco Jazz Festival (Edinburgh International Jazz and Blues Festival), the San Francisco Blues Festival (Edinburgh Jazz and Blues Festival) and the San Francisco Fringe (Edinburgh Festival Fringe).

The San Francisco Jazz Festival's aim comes out of SF Jazz's mission, which is dedicated to encouraging the growth of jazz and jazz audiences in San Francisco and beyond. It is keen to give new, local talent a stage on which to perform. Originally a small-scale event known mostly in the local community, the Festival has risen to national and international prominence and features dozens of events of both traditional and contemporary jazz. It describes itself as the 'crown jewel of American jazz festivals'. It is 22 years old and is held during October and November for 19 days. The Jazz Festival draws 35-40,000 ticketed patrons in around seven venues. It feels that it is not a traditional festival in that it does not involve multiple overlapping performances. Potential peers are Jazz at Lincoln Center, the JVC Jazz Festival and Earshot Jazz Festival.

The San Francisco Blues Festival is the longest continuously running blues festival in the United States. It is 33 years old and is held during September for two days. It takes place on a single stage. There were 16 performers in 2005.

The San Francisco Fringe aims to allow total creative freedom by exerting little top down control, encouraging risk-taking and new ideas, and the development of an audience for contemporary work. It follows the mandate of Fringes of North America, which involves 100% of ticket receipts going to performing companies, and an open access festival selection by lottery. It is 13 years old, and is held during September for 12 days in seven indoor venues. 42 companies attended in 2005. It is small. In 2004, total audience was 6,629.

Festival Strategies

There is not a city-based festivals taskforce to promote the agenda of local festivals; and there are no signs of increased cooperation and coordination between San Francisco's festivals. Local government appears not to have a special strategy for the future of San Francisco's festivals going forward.

Festivals are not a policy focus for national and regional government. As a municipal concern, festivals are not high on the local government's agenda, as is shown by the low level of public funding received by San Francisco Jazz festival in comparison to, for example, the Chicago Jazz Festival, which is presented for free as a result of large public funding, or the Montreal Jazz Festival.

Administration

The San Francisco Jazz Festival is run by SF Jazz, a not for profit presenter of jazz concerts and year-round education programmes. It is the leading non-profit jazz organization on the West Coast of the U.S. and the 6th largest performing arts organization in the Bay Area. Its members help support creative programming, artists' residencies, education programmes, composers, as well as the festival. It has a membership of 2,500, more than 100,000 annual concert patrons, and is supported by numerous corporations (some of whom come together to form the SF Jazz Business Council), foundations and government agencies in the Bay Area.

The San Francisco Jazz Festival makes tickets available to SF Jazz's members before they are available to the general public, and its opening night is open solely to members. The organisation has an actively involved board of trustees. Its Executive Director is Randall Kline. SF Jazz also runs a Spring festival and 'Summer Fest', an annual free outdoor season that runs from June to October and has 25 events. It is also heavily involved in educational work, visiting schools in the San Francisco area; and it deploys merchandising. The organisation's income is approximately 3-5% public subsidy, 35-45% from private foundations, corporations and individuals, and 50-60% earned. Expenditure figures are confidential.

The San Francisco Fringe Festival is organised by EXIT Theatre, a 22-year-old four venue theatre which runs as a tax-exempt, non-profit organisation. The theatre has two full-time and one part-time staff, who double as festival staff. They are supported by extra staff and volunteers before and during the festival. Its income is 9% public subsidy and 11% private subsidy and 80% earned income. It budgets 82% on programming, 13% on marketing, and 5% on overheads. The Festival has been a member of the Canadian Association of Fringe Festivals for the past twelve years.

Marketing & Ticketing
San Francisco Convention and Visitors Bureau, a private, non-profit organisation, presents www.sfvisitor.org, which provides information on San Francisco as a destination for business and leisure tourists. The site gives information on festivals and events, but does not have dedicated promotion of festivals, nor a facility for buying tickets, nor information on individual festival events. There is no dedicated festival website. Tickets for some events are available through ticketing websites such as www.ticketmaster.com. Otherwise festival tickets can be purchased on festival websites, by telephone from festivals and venues and from venue websites. There is not a single agency selling festival tickets or coordinating festival delivery and marketing. The festivals are individually branded. The festivals do not have informal supportive relationships with one another and do not share overheads.

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Consultants recommendations for Edinburgh festivals

The recommendations for the Edinburgh festival strategy have been included as an indication of competitive activity for festival audiences:

<u>The consultants (AEA) Recommendations for Edinburgh 2006</u>
From an examination of total attendance levels and visitor numbers for Edinburgh's Festivals, it appears that there are grounds for confidence in the short term. However, the scale of finance being made available to support new cultural infrastructure and festival activity in other cities and the rapidly developing quality of other festivals' programmes and managements suggests that Edinburgh can not risk complacency. The longer term changes in this report – demographic, technological, and governmental trends – also require careful on-going monitoring. The non-profit cultural sector throughout western democracies is undergoing profound changes and the festivals, by virtue of their reliance on, and relationship to, the 'global' cultural economy are sensitive to those changes.

Competition between cities in relation to their festivals tends to be evaluated simplistically on the basis of profit (sales), prestige (media profile), size (numbers of events), often translated into numbers of visitors and attendances, extent and value of media coverage, and scale of economic value-added impacts. There is evidence, especially in the UK, of both public and private sector interests supporting and even directly instigating and managing particular festivals themselves to achieve local or regional economic objectives, often defined very narrowly (sales, jobs, tourists). There is also an equally increasing supply of smaller more local community-based festivals and events in cities, most often supported by local councils, that have been spawned partly as a reaction to larger festivals that have become prime economic drivers. Such community-based festivals often try to re-claim cultural ground based on their social, educational and participative value.

Following an examination of the data, our conclusion is that when viewed against the sustained development of some of the actively competitive cities over a time span of the next five to seven years, Edinburgh's current enviable position as a pre-eminent festival city is vulnerable. In Chapter Two we identified the distinguishing characteristics of successful festival cities – some 20 in total. Edinburgh enjoys many of these characteristics, though not all.

Below we identify those areas where we believe action needs to be taken, based on analysis outlined in the body of the report.

Long-term Planning and Strategy:
The Festivals' development should be considered in minimum blocks of 5 years, and set within a longer-term strategic context of a city's long-term development and competitiveness.

The festival strategy of the city as a whole needs to be kept under review by stakeholders. The commissioning forum for this report, for example, is ad hoc in character although it offers the prospect of a model for longer term strategic oversight of the aggregate festival offer and the policy steps required to support it.

Recommendation One: That the Festivals and their stakeholders ensure that there is on-going forum in which the longer term health of Edinburgh as a Festival City is monitored and the investment strategy required to sustain its position cost effectively is articulated and overseen. The forum should include external members with a long term perspective on the internationally competitive economic and cultural standing of Edinburgh and Scotland. This need not, as a mechanism, challenge the artistic autonomy of the Festivals. It should, however, provide a context for indicative planning and early warning as to the impact of competitive trends. The festivals and their stakeholders should, through this mechanism, become more consciously aware of the need to direct investment - whether in marketing or presenting – toward specific competitive challenges
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The Festivals and Events Champions' Working Group (or a sub committee of that group) has been suggested as a forum for this. If so, then an explicitly longer term and more strategic framework for its modus operandi may need to be developed.

Investing in Quality over Quantity:
Success depends on achieving and sustaining a consistent international quality threshold for all festivals in order to ensure that the brand value of the festivals is sustained. Volume per se is of little intrinsic strategic value - that is, either the size or number of festivals, once some base threshold has been agreed. Careful impact assessment of any new festival to be added to an existing mix should be a requirement. This is more a question of understanding the implications (both positive and negative) of new entrants than creating a cartel of existing players.

Edinburgh's strategy as a Festival City is one of pre-eminence. It is to ensure that the brand is uniformly supported by the offer. This means that the stakeholder strategy should be to ensure that available resources for funding are focused on those aspects of the festival offer that do or can attain a degree of distinctiveness and pre-eminence within their respective art forms.

Recommendation Two: That stakeholders and funders take a more strategic view of their funding obligations, ensuring that the collective impact of their resource allocation is such that those programmatic initiatives that they support have the potential to be, or already are, world class in their quality and delivery and that their ability to meet such standards clearly and explicitly informs decision-making on resource allocation.

The Edinburgh City Council should consider increasing its current cultural spend from 2.8% to 4% in the first instance and work in tandem with other public stakeholders to develop an investment plan for the festivals over the next five to seven years, based on the key investment areas highlighted in this report.

The comparatively small tax base that Edinburgh has compared with benchmark cities provides a strong rationale – in the context of its economic impact for the whole of Scotland – for the festivals funding framework to access the wider, national, tax base. The Scottish Executive should consider how the national tax base and Edinburgh's contribution might be better reflected in the annual settlement to the City of Edinburgh Council and Creative Scotland to assist in increasing the levels of investment to both Edinburgh's Festivals and cultural infrastructure.

Recommendation Three: That the Festivals, in turn, focus their planning efforts, on the creation and marketing of competitive programming, appropriate to their current and potential mission and aims at regional, national and international level. This should explicitly inform strategic planning and goals should be articulated and costed and progress toward them monitored as part of the standard apparatus of accountability to funders.

Recommendation Four: That no new festival should be embraced as part of the City’s offer unless its niche and ability to fulfil that niche in the international arena is clear.

Talented and Experienced Direction:
Visionary artistic and managerial leadership are essential, and conditions for recruitment, selection, retention and succession need to be carefully considered to attract the best talent and to support the creativity that such leadership inspires.

The Festivals are in a globally competitive market for administrative and programming talent. The quality of their curatorial and administrative leadership, together with the resourcing of that leadership are perhaps the most important factors in retaining pre-eminence. As leadership changes take place, the Festivals’ boards’ and their stakeholders should ensure that every step is taken to attract and retain executive leadership of internationally competitive calibre.

Recommendation Five: The festival boards should give the closest possible attention to succession planning, and ensure that the recruitment and retention of leadership is undertaken in a way that attracts the interest of the strongest pool of eligible candidates.

Focused and Innovative Programming:
The cultural programmes must be curatorally focused and continually innovating; investment in innovation is a prerequisite of sustainability.

For the festivals to retain, or in some cases attain, collectively their pre-eminent international position, they need to be have the resources to invest in what in other sectors would be described as ‘strategic product research and development’ – that is, the commissioning, development and presentation work that is new to their target audiences or is interpreted and presented in new ways. There is no prospect of retaining international pre-eminence without a secure budget line dedicated to this.

Recommendation Six: The Festivals should identify in their strategic plans their required investment strategies to ensure that their programming includes a significant element of the presentation (and as appropriate commissioning) of new work and that the rationale for that new work is articulated.

Recommendation Seven: The Festivals' core funders embrace the relationship between continued pre-eminence and innovation and pay particular attention in reviewing funding proposals to the need that research and development requirements are adequately funded.

Excellent Facilities:
Provision of world-class venues, outdoor event spaces and other festival infrastructure to accommodate world-class programmes, including the need for continuous innovative use of existing and new indoor and outdoor spaces is an attribute of successful festival cities. Edinburgh is now faced with aggressive worldwide competition in cultural facilities and supporting infrastructure. The cultural building boom of the past two decades has resulted in world class venues in even relatively small cities. Edinburgh currently has a number of first class venues but have no overall strategic plan for capital investments in the costs.

The capital resources to achieve the levels of investment required may prove to be considerable. Consideration should therefore be given to alternative sources of funding such as the introduction of a Tourism Bed Levy or casino levy or the hypothecation of Airport tax with resources raised directed into cultural and tourism infrastructure.

Recommendation Eight: That the City of Edinburgh Council undertake a development plan for the infrastructure (including venues) required for the success of the Festivals (drawn up jointly with relevant partners).

Strategic Promotion:
As international competition for the attention of the cultural tourist and international media increases, Edinburgh will have to work hard to retain its edge, let alone lead the pack. In order to do this, the Festivals will need to continue to work with EventScotland, VisitScotland and other relevant agencies to develop a joint marketing strategy aimed at selling Edinburgh as the world's premier festival city. Individual festivals will not be able to compete in this marketplace on their own. At the same time, tourism agencies need to acknowledge the value of the Festivals in promoting Edinburgh and Scotland as a destination.

In addition to tourism marketing, a joint message is critical for retaining UK media attention, especially in the coming years when the media will be focused on Liverpool in 2008 and London in 2012. Many media sources need quick access to information, so creating a centralised source (preferably on line) where journalists can get information about all of the festivals will be crucial.

Many of the festival cities studied are recognising the importance of a more coherent and longer-term approach to marketing. In many cases, these strategies are developed in cooperation with local government and tourism agencies. The driver for such strategies is the desire to use festivals as a way of elevating the profile of a city. The hope is that these sorts of activities will drive tourism and result in significant economic impacts on the city.

After being named the European Capital of Culture for 2008, Liverpool unveiled an extensive plan to transform the city's cultural profile. In addition to significant investments in venue infrastructure and the creation and presentation of new work, the city has allocated nearly £3m per year to brand and market the city as a cultural destination.

Recommendation Nine: The machinery and resources should be put in place under an agreed management structure to promote Edinburgh, the Festival City worldwide

Recommendation Ten: A joint festivals marketing strategy should be developed by Festivals Edinburgh members and their stakeholders and resourced by those stakeholders that have a strategic interest in Edinburgh's continued pre-eminence as a festival city.

Strategic Intelligence:
Recommendation Eleven: The Festivals should continue to commission joint research so they maintain a sense of who their individual and collective audiences are. They should also use this data to understand audience cross-over between festivals so they can target specific segments that are interested in programming from multiple festivals.

All publicly-funded arts organisations are under increasing pressure to demonstrate how they are expanding audiences. The Festivals have benefited from the resources of The Audience Business, a market-research organisation responsible for delivering audience and visitor research in Edinburgh. The Festivals have access to considerable amounts of market data and when funding permits, are able to commission additional high quality research.

However, not all of the individual festivals do this. Research should always be commissioned with a strong strategic direction in mind or with specific decisions linked to the outcomes. In order to develop a lasting audience for the arts in Edinburgh, the Festivals should share data more routinely and assist one another in developing strategies. This recommendation is directly linked to the preceding recommendation to develop a joint marketing strategy. The Audience Business can continue to play an important role in this regard and the Festivals should embark on the construction of a unified database of findings. Important changes will come with the implementation of the new box office data collection ('vital statistics') system from Purple 7 towards the middle of 2006, which will allow all venues' box office data, including the festivals, to be collated and collected on a daily basis. It will allow for sophisticated segmentation of Edinburgh audiences and will make it easier to target non-core audiences.

The Festivals have been committed in recent years to strengthen educational programmes, not only to satisfy government agencies, but to prepare the next generation of local festival goers and to develop long-term relationships with the local community. However, similar to other initiatives, they are fragmented and spread across different festivals; there appears to be limited pooling of expertise and experience between education workers and teams and no consolidated effort to coordinate and expand provision as a whole. This is a priority that requires to be addressed across all festivals and should be a core activity of Festivals Edinburgh.

Recommendation Twelve: Additional collaborative projects should be developed that focus on audience and educational development.

Political Will Matched by Strong Leadership and Political Independence:
Sustained policy-driven support by funders should be linked to strong leadership offered by the governing structures. Members of governing bodies should have appropriate expertise and have an appropriate balance of skills, interests and contacts to support a festival's objectives. The programme should not be influenced by political interests and the operational structures should be autonomous, characterised by strong governance. Political and operational alliances must work toward commonly agreed goals.

The Festivals' boards should be strengthened in composition, vigour of oversight and organisational articulation to overcome any impediment to long term organisational development.

Recommendation Thirteen: The Festivals and their stakeholders should invest in a programme of board development, ensuring that the board composition and modus operandi matches the aspirations and achievements of the Festivals.

Coordinated Processes of Monitoring and Evaluation:
The primary aim of monitoring and evaluation should be to promote a learning environment that encourages continuous improvement, with the acknowledgement of successes and achievements as well as problems and mistakes of the Festivals and the funders. Financial control systems should be in place to help negate adverse cost variances, as well as business planning that uses options appraisals, scenario planning and financial modelling techniques.

Recommendation Fourteen: The Festivals and their core stakeholders should agree the criteria, priorities and processes for monitoring and evaluation of each festival's contribution to the strategic objective of retaining the City's pre-eminent festival status and festivals as a whole. A 'toolkit' should be devised that balances economic, social and cultural goals with innovation and management effectiveness suitable to the regional, national and international fit of each festival.

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http://www.culturalpolicies.net/netherlands.htm
Manchester
http://www.manchester.gov.uk/regen/culture/themes.htm
Newcastle/Gateshead
http://www.newcastle.gov.uk/artscult.nsf/a/objectives
http://www.visitnewcastlegateshead.com/viewpage.php?id=834&s=10
http://www.gateshead.gov.uk/culturalstrategy/
San Francisco
http://www.sfartscommission.org/home.htm

Other festivals included in the study

FESTIVAL - Italy	WEBSITE
San Remo Festival	www.sanremo.rai.it
Umbria Jazz Festival	www.umbriajazz.com
Venezia Film Festival	www.mostradelcinemadivenezia.tv
International Rome Film Festival	www.romacinemafest.it
Taormina Film Festival	www.taorminafilmfest.it
Play Arezzo Art Festival	www.playarezzo.it
Ferrara Festival Buskers	www.ferrarabuskers.com
Heineken Jammin' Festival	www.heineken.it
Venice Carnival	www.carnevale.venezia.it

FESTIVAL - France	WEBSITE
Festival d'Avignon	www.festival-avignon.com
Jazz à Vienne	www.jazzavienne.com
Festival de Cannes	www.festival-cannes.com
Festival d'Automne	www.festival-automne.com
Festival International de la Bande Dessinèe	www.bdangouleme.com
Festival International du film d'animation	www.annecy.org

FESTIVAL - Spain	WEBSITE
La Tomatina	www.tomatina.es
Feria de Abril	www.feriadesevilla.andalunet.com
Aste Nagusia Bilbao	www.astenagusia.com
Pamplona Festival	www.pamplona.es
Las Fallas Festival	www.fallas.comunitatvalenciana.com

FESTIVAL - Germany	WEBSITE
Berlin International Film Festival	www.berlinale.de
Frankfurt German Jazz Festival	www.hr-online.de
Oktoberfest The world's biggest beer festival	www.oktoberfest.de

FESTIVAL - Nederland	WEBSITE
Amsterdam Fringe Festival	www.amsterdamfringefestival.nl
Queen's Day	www.queensdayamsterdam.eu

FESTIVAL- Eire	WEBSITE
St Patrick Festival	www.stpatricksfestival.ie
Cork International Choral Festival	www.corkchoral.ie
Beamish Cork Folk Festival	www.corkfolkfestival.com
Wexford Opera Festival	www.wexfordopera.com

FESTIVAL - Austria	WEBSITE
Salzburg Festival	www.salzburgerfestspiele.at

FESTIVAL - Switzerland	WEBSITE
Lucerne Festival in Summer	www.lucernefestival.ch

FESTIVAL – United Kingdom	WEBSITE
Aberdeen International Youth Festival	www.aiyf.org
Althorp Literary Festival	www.althorp.com
Ashbourne Festival	www.ashbournefestival.org
Bath International Music Festival	www.bathmusicfest.org.uk
Bestival	www.bestival.net
BBC Proms	www.bbc.co.uk/proms
BBC Radio 1's Big Weekend	www.bbc.co.uk/radio1/bigweekend/
Beaminster Festival	www.beamfest.org.uk
Brighton Festival	www.brightonfestival.org
Buxton	www.buxtonfestival.co.uk
Cambridge Summer Music Festival	www.cambridgesummermusic.com
Canterbury Festival	www.canterburyfestival.co.uk
Cheltenham Jazz Festival	www.cheltenhamfestivals.com/jazz
Edinburgh Festival Fringe	www.edfringe.com
Edinburgh International Festival	www.eif.co.uk
Glastonbury Festival	www.glastonburyfestivals.co.uk
Grassington Festival	www.grassington-festival.org.uk
Guildford International Music Festival	www.guildfordinternationalmusicfestival.co.uk
Harrogate International Festival	www.harrogate-festival.org.uk
Ilkley Literature Festival	www.ilkleyliteraturefestival.org.uk
Larmer Tree Festival	www.larmertreefestival.co.uk
Leeds Festival	www.leedsfestival.com
Leicester International Music Festival	www.musicfestival.co.uk
Manchester International Festival	www.mif.co.uk
North Norfolk Music Festival	www.northnorfolkmusicfestival.com
Portsmouth Festivities	www.portsmouthfestivities.co.uk
Ribchester Art and Music Festival	www.ribchestermusicfestival.co.uk
Salisbury International Arts Festival	www.salisburyfestival.co.uk
T in the Park	www.tinthepark.com
V festival	www.vfestival.com
Worcester Art Festival	www.worcesterfestival.co.uk

FESTIVAL - Dorset	WEBSITE
Bournemouth Live Music Festival	www.bournemouthlive.info
Abbotsbury Music	www.abbmusic.org.uk
Beaminster Festival	www.beamfest.org.uk
Dorset Arts Week	www.dorsetartweeks.co.uk
Sherborne Abbey Festival	www.sherborneabbey.org
Sting in the Tale Festival	www.stinginthetale.org.uk
Swanage Folk Festival	www.swanagefolkfestival.co.uk
Swanage Jazz Festival	www.swanagejazz.org.uk
Tolpuddle Martyrs Festival	www.tuc.org.uk
Wessex Folk Festival	www.wessexfolkfestival.co.uk
Wimborne Folk Festival	www.wimbornefolkfestival.co.uk
Fossil Festival	www.risingseas.co.uk
Inside Out Festival	www.insideoutdorset.co.uk
Purbeck Strings Festival	www.purbeckstrings.com
Purbeck Film Festival	www.purbeckfilm.com

Arts and Culture Board Consultation

The following members of the Bournemouth Arts & Culture Board were interviewed regarding the proposal:

Councillor Stephen MacLoughlin
Councillor Beverley Dunlop
Simon Taylor
Shelagh Levett
Terence O'Rourke
Helen Sloan
Kate Castle/Eckhard Thiemann
Kate Wood
Andy Price (telephone)

Four responses were received from the survey distributed to the Board.