



# Edinburgh Festivals The Network Effect

The role of the Edinburgh Festivals  
in the national culture and events sectors

July 2018

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# 1. Executive Summary

Edinburgh is an undisputed world leader as a festival city. The innovation and momentum of its Festivals inspire people from local audiences through to international cultural peers.

Thanks to research commissioned by Festivals Edinburgh, the impacts that the Festivals have on the city of Edinburgh and on Scotland's international profile are well documented. This study pioneers a new field of enquiry and explores the relatively hidden Festivals' impacts within Scotland's cultural and events ecosystems: as the literature review demonstrates, no body of research yet exists on such regional impacts for cultural events.

The scale of activity in Edinburgh is key and in 2016-17 the Festivals spent:

- collectively £10.5m on event production, with 89% [£9.3m] of that spent with Scottish based companies
- collectively £9.3m on creative talent, with 56% [£5.1m] of that spent with Scottish based individuals and organisations
- total spend on event production and creative talent in Scotland was £14.4m, representing 46% of the Festivals' collective total expenditure in these areas

But their role goes far beyond mere numbers. The international profile; the variety of events; and the number of participants, permanent and temporary staff, combine to give the Festivals a specific role in the Scotland-wide cultural and events ecosystems. Talent, ambition, skills, jobs, ideas and inspiration circulate through the system, boosted by the Festivals. This research highlights that being the home of these large-scale, internationally renowned events benefits all Scottish cultural and event organisations. This is reflected by the prominent role the Festivals play in national strategies, including *The Perfect Stage* (Scotland's Event Strategy).

There are also a range of specific activities, from networking to training to business development, which occur around the Festivals and support the national cultural and events scene. The case studies demonstrate how other global cultural initiatives have planned such activity programmes to support their sectors. In contrast, in Edinburgh these activities have evolved independently

under a strategic approach to supporting bottom-up innovation. However, as such, their collective impact is not currently sufficiently understood or recognised.

Although each Festival works differently with its specific cultural sector this research identifies five key common impacts that the Festivals have collectively in the Scottish ecosystems of culture and event production:

- **Scottish creative talent gets high profile promotion** in local and international markets that is essential to their financial development
- for **the event production sector, the Festivals create stability**: risk is reduced, new talent is developed and professional networks formed
- the Festivals **support sectoral lead bodies** through personal networks, brand reinforcement and lending weight to key sectoral discussions
- a high number of **formal and informal training initiatives** are built around the rich opportunities that the Festivals present for practitioners, technicians and cultural managers. The professional experience gained through Festival work ensures there is a strong pool of talent available
- the 'halo effect' of the global recognition of Scotland as a home for culture gives both **cultural organisations and audiences pride and confidence** across the nation.

This report is a pathfinder for future work to grow and develop the Edinburgh Festivals and makes five main recommendations:

1. Embed the story of the Festivals' role across Scotland in the Festivals' impact narrative and the country's cultural narrative
2. Gather further data, including participant experiences, to evidence the narrative of sectoral support
3. Formalise and develop the Festivals' role as technical training platforms
4. Dedicate resource to opening up the Festivals to education and training partnerships
5. Seize the initiative in developing the Festivals' role in the wider Scottish culture and events landscape

## 2. Introduction

Edinburgh's identity as a festival city has been built over the past 70 years to its current position as an acknowledged world leader. Its individual festivals are leading cultural brands in their respective fields; collectively, they attract audiences in excess of 4.5 million and have an economic impact of £313 million annually.<sup>1</sup> Their pioneering collaborative approach has enabled them to plan certain aspects of their work collectively and has led to the production of a series of major impact studies to support the Festivals' continuing growth and development.

Through these studies, the Festivals have demonstrated the efficacy of their partnership model and set new standards in quantifying the cultural, economic, social and environmental impacts of the Festivals. Thanks to this work, there is a comprehensive body of evidence for the Festivals' roles as an international cultural platform, as a major attraction for Edinburgh residents and investors, and as a defining feature of Edinburgh / Scotland's cultural identity on a global stage. This set of studies has played an important role in highlighting the value of the Festivals to Scotland's international relations and to Edinburgh's cultural, social and economic eco-system.

### 2.1 Project aims and objectives

Building on this strong platform, the Festivals commissioned this new study, through their collaborative vehicle Festivals Edinburgh, to extend the understanding of the Festivals' role and impacts in new directions. In the context of the development of the first national cultural strategy, a refresh of Scotland's Events Strategy, *The Perfect Stage*, and the 70<sup>th</sup> anniversary of the beginnings of the Edinburgh Festivals, this research looks specifically at how the Festivals function as a national cultural asset for Scotland, looking beyond Edinburgh to the country as a whole.

In particular, the research aimed to identify and understand the Festivals in terms of two twin strands, looking at how they influence and contribute to Scotland's:

- creative and cultural ecosystem (creative supply chain)
- wider events ecosystem (events production supply chain)

This 'twin strand' approach has governed the way in which the project methodology was constructed and delivered. In reporting on impacts, however, findings have been streamlined and combined where appropriate to provide a focused overall picture.

Of these two ecosystems, the Festivals' impact in the former (creative and cultural) was already indicated in the 2011 impact study, which partially explored the impact of the Festivals on the Scottish creative talent that participates. This focus has been extended here to include the impact of the Festivals on Scottish venues, companies and organisations outside Edinburgh.

The Festivals' impact on the events sector in Scotland has not previously been studied – though the 'one Scotland' approach of EventScotland's *The Perfect Stage* (2015) strategy recognises both the connectedness of the Scottish events sector and the importance of the Edinburgh Festivals. The current research aimed to uncover a clearer picture of the nature of the relationship between the Festivals and the wider events sector.

The research objectives can be summarised as follows:

- define the roles that the Edinburgh Festivals play in the events sector and creative eco-system
- assess the impact of such Edinburgh Festivals' roles on the events sector and creative ecosystem
- provide supporting qualitative research

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<sup>1</sup> Source: BOP Consulting (2016) *Edinburgh Festivals 2015 Impact Study*, report for Festivals Edinburgh.

- recommend a suitable framework for the regular updating of such cultural impact data; and
- provide an analysis of where comparable UK and/or international data on cultural impact could be sourced.

## 2.2 Approach

This impact study is primarily qualitative. Whilst earlier studies have gathered significant volumes of primary quantitative data, this was not felt to be appropriate in this case. As a pathfinder study, what the impacts of the Festivals in the wider cultural/creative and events sectors might be was not yet known: the priority was to develop a picture of what role the Festivals played, and develop a plan for collecting supporting data in future years.

As we explore in the Literature Review (c.f. Appendix 1), the nature of this study is pioneering. Whilst economic impact studies for major events have become standard, there are few if any models for considering the role of such events in their wider ecosystems. We hope that, once again, Edinburgh Festivals' innovation in this area will lead to wider consideration of this aspect of cultural activity.

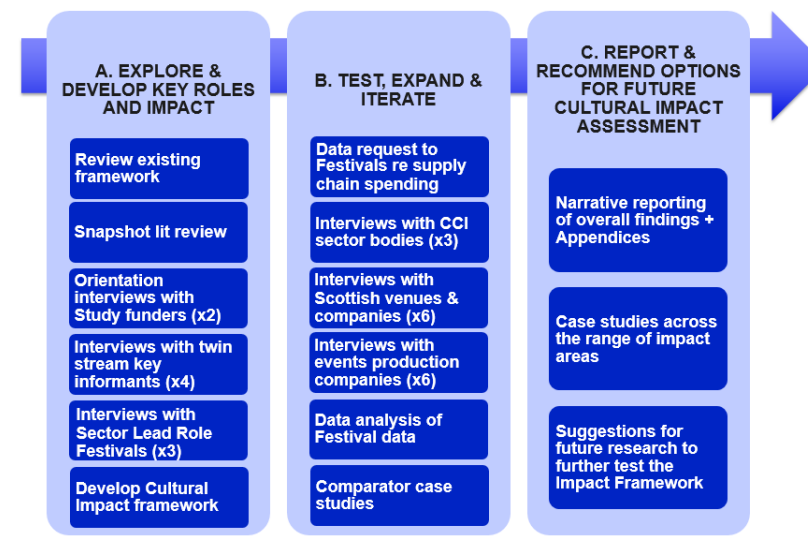
## 2.3 Process, timeline and methodology

The need for this new piece of research was discussed and agreed by the Management Board of Festivals Edinburgh, which includes the CEOs or Directors of each of the 11 member Festivals. BOP Consulting was commissioned to carry out the research in consultation with Festivals Edinburgh and in collaboration not only with the Festival Directors, but also with the two key national funding agencies, EventScotland and Creative Scotland.

- Feb 2017                      Invitation to tender issued
- April 2017                    BOP Consulting commissioned
- May to December 2017    Fieldwork and analysis
- January 2018                Discussion of headline findings
- March 2018                  Report completion

The programme of work was planned in three stages, as laid out below:

Figure 1 Methodology overview



Source: BOP Consulting (2018)

### 2.3.1 Interviews

A structured approach was taken to all interviews to allow findings to be compared, whilst space was also left in discussion for participants to contribute any reflections or information they felt to be relevant.

As can be seen in this model, the fieldwork was carried out in two phases. In Phase A, interviewees were explicitly asked to provide an overview of their field and suggest further contacts across it. This method allow contacts to 'cascade' from interviews with those already closely involved with the Festivals (the study funders, key sectoral informants and Festivals themselves) outwards to those working with the Festivals or at further remove. Through the interviews, we have endeavoured to trace the Festivals' impacts along their supply chains in both

creative and events sectors, and geographically, conducting interviews with those based in the far north of Scotland, in southern England, and with many points in between. Cultural interviewees included representatives of different sectors and different cultural management roles: we did not approach creative practitioners. Event sector interviewees included venues and suppliers, all of whom had a working relationship with the Festivals of some sort. In total, 26 telephone interviews were conducted. The data from these interviews is anonymous but we have indicated the nature of the individual's role when using direct quotations.

Whilst invitations were issued to interviewees based on their specific roles in either the cultural/creative or events sector, we found that all respondents had views on the cultural reach of the Festivals, and many cultural respondents were also able to provide views on the events and production side. Additional information was also provided by some participants in the form of strategy or funding documents, which have provided a useful source of further evidence.

### **2.3.2 Data request to the Festivals**

The data request to the Festivals to evidence their supply chain spending in both cultural/creative and events sectors was structured according to two principles: firstly, to gather top level data on expenditure already held by the Festivals; and secondly, to build upon the data collection model used in the 2015 impact study (also designed and delivered by BOP Consulting).

The request asked Festivals to provide data in three main areas:

- direct spend on creative talent (i.e. fees paid to artists/performers/companies but not travel or hospitality)
- event production spend; and
- breakdown of the above spends by location of provider – in Scotland; rest of UK; and rest of world.

Ten festivals provided data, and festivals were supported in providing their data by the research team to ensure consistency. It should be noted that although data was provided by the Edinburgh Festival Fringe Society, this does not

include the full costs for the Edinburgh Festival Fringe itself since, as an open access festival, such data is not held centrally but rather retained by individual promoters and participants.

The eleventh festival that participates in Festivals Edinburgh – Edinburgh's Hogmanay – was not included on the grounds that it had just moved to new management, such that its model of operation was both new and in transition. In future research however, it would obviously be beneficial to include all eleven Edinburgh Festivals. The headline figures for total spending on creative talent and event production costs in Scotland is included in section 5.2 below, and more detailed results of the data request are provided in Appendix 2.

Only financial data relating to direct spend by the Festivals themselves has been included here. In the case of the Edinburgh Festival Fringe, and specific project areas of some other Festivals, there is additional expenditure on event production and creative talent made by participating organisations. As such the full expenditure in the areas of event production and creative talent required to stage the overall festivals offering is greater than the figures for direct Festival expenditure given here.

### **2.3.3 Literature review and Case studies**

The timing of the research for the case studies was deliberately set for later on in the fieldwork process, to allow these to provide points of comparison with / illustrations of the impact areas identified.

Initial research on suitable events was delivered as part of a literature review of both academic and grey (professional / public facing) media – it was hoped that existing evaluation in a similar vein, tracing a cultural event's role in a wider regional / national ecosystem would provide some direct points of comparison. It was interesting to discover that very little such research existed (the sole example that we found being for the European Capitals of Culture), and therefore this study has taken a relatively new direction in impact assessment. Desk research was supplemented by interviews with relevant organisations, all of which offered a point of comparison and a learning opportunity for the Edinburgh Festivals (see Figure 2 below).



**Figure 2 Case studies chosen for the research**

Cultural event	Comparison	Key learning area
Design Indaba	Multi-disciplinary festival aiming to put city and nation on the global stage	Supports both culture and the creative economy as a matter of policy
Belfast's AVA Festival	Major arts festival with significant city investment	Established specifically to support national cultural/creative ecosystem
Melbourne International Festival	Festival city explicitly modelled on Edinburgh (and with which it is highly connected)	Regional strategic agency is commissioning research into sharing resources (staff, expertise) across the festivals and region's cultural ecosystem
European Capitals of Culture (ECOC)	Edinburgh Festivals effectively deliver an ECOC offer year on year	Specific strategies to extend ECoC benefits across regional cultural ecosystems

Source: BOP Consulting (2018)

### 2.3.4 Logic model and structure of the report

In accordance with the 'twin stream' approach and following the first stage of interviewing, a dual logic model was produced to guide the research. This two-part diagram (Figure 3 below) details the distinct outcomes of the Festivals' work in the creative/cultural and events spheres, and shows how these contribute to a positive impact in the relevant sector (in line with the strategic aims of Creative Scotland/ EventScotland.)

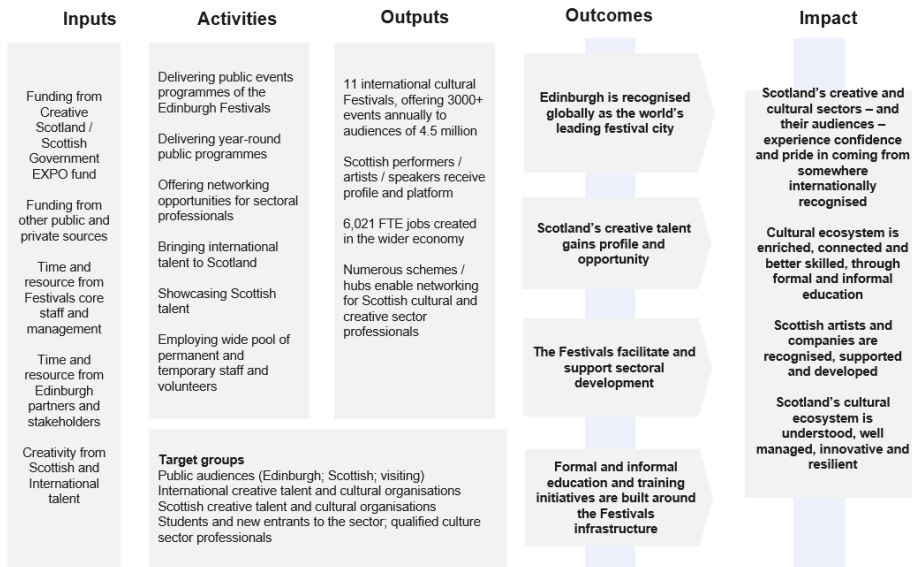
In total, this dual model identifies eight outcomes of the Festivals' activity in wider Scotland – four for the creative/cultural sector, four for the events sector. Whilst the two parts of the diagram are shown as distinct, in practice however there are overlaps – just as there should be between two such intertwined sectors:

- both cultural / creative and events activity contribute to the recognition of Edinburgh globally as a world leading festival city (the first outcome on both diagrams);
- the Festivals support sectoral development for the creative, cultural and event spheres: while there is nuance to the different ways this is accomplished in each sector, there is sufficient commonality to allow findings on this outcome to be reported together; and
- formal and informal training initiatives are delivered in both the cultural/creative and events sectors.

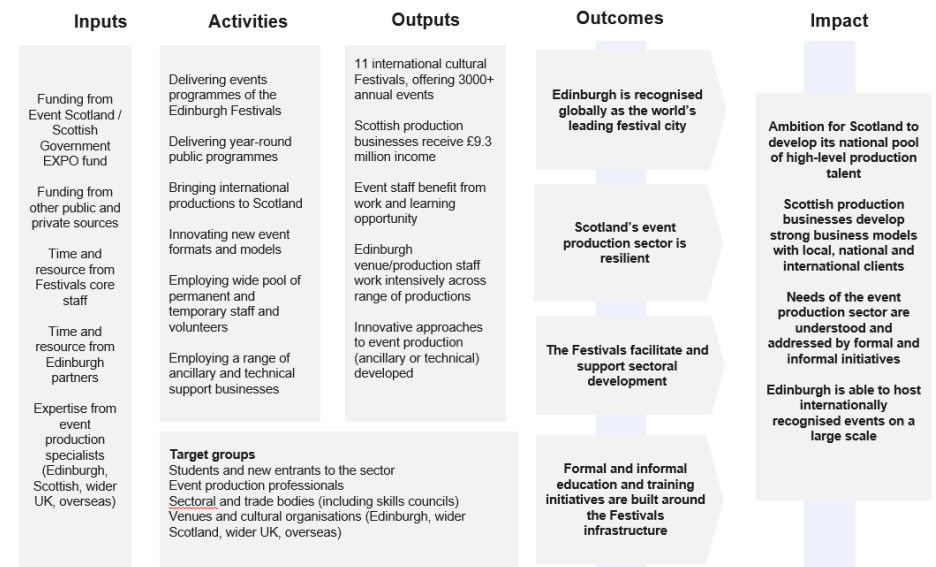
In structuring this report, therefore, we have combined the reporting of findings around these outcomes into a single chapter each that addresses both of the twin strands. There are therefore five, rather than eight outcome area chapters in the report. These outcome areas lay the foundations for what we have characterised in the conclusion as the five roles played by the Festivals. Our recommendations are based around developing and strengthening these five roles to increase further the impact of the Festivals in Scotland's successful cultural, creative and events sectors. The case studies then highlight ways in which other organisations have approached delivering on these roles in their own contexts.

Figure 3 Twin strand logic models

Logic model: Creative and Cultural Impact



Logic model: Event Production Impact



Source: BOP Consulting (2018)

## 3. Edinburgh is recognised globally as a world leading festival city

### Summary

The Edinburgh Festivals are funded from a mix of public and private sources for a range of cultural, economic and social reasons, including the enhancement of international profile for both the city and the Scottish nation. Their success in this regard is both widely acknowledged and a key element of national policy (c.f. *The Perfect Stage*). The scale of the Festivals – both collectively and individually – in terms of size, ambition, and profile is key to their role within the Scottish creative and events ecosystems and enables all of the Festivals’ other impacts. The benefit of having events at this scale is felt throughout the ecosystem from audiences through producers to strategic bodies. “The ‘halo effect’ of the Festivals benefits the rest of Scotland.”

### 3.1 Overview

Edinburgh’s Festivals each year deliver over 3,000 events, reaching audiences of more than 4.5 million and creating the equivalent of approximately 6,000 full time jobs. 32% of the 14 million+ annual visitors to Scotland are motivated by the nation’s cultural and heritage offer, in which the Festivals play a defining role.<sup>2</sup>

Their extensive media coverage includes an estimated 30.1 billion views of online articles globally.<sup>3</sup> Many of the Festivals are major global players in their respective fields and collectively the city’s year-round offer and profile are remarkable, with research in 2017 showing that participants from 85 countries took part in the Festivals during that year.

<sup>2</sup> VisitScotland Visitor Survey 2015.

Figure 4 Global participation in Edinburgh Festivals



Source: Festivals Edinburgh

### 3.2 Impact across Scotland

The importance of the global scale of the Edinburgh Festivals was reiterated with varying emphases by interviewees across the study:

“ We have a global reputation because of them – you come from somewhere that people have heard of – and that matters! (Event production supplier)

<sup>3</sup> Meltwater News tracking for 2010, Edinburgh Festivals Impact Report 2011 (BOP Consulting).

“ By experiencing high quality, challenging festival work, audiences are inspired and confident to seek out more, and more exciting, work across the year – we can evidence this through audience feedback data (Festival director)

This is quite a subtle impact. Respondents were clear that there was little crossover between Festivals' audiences and audiences elsewhere in Scotland. The shaping of cultural preferences is not (necessarily) through direct contact with Festival content but is about a general, nationwide appreciation of the importance of culture that enables a generally raised game. This feeling is reinforced by the fact that the Festivals exert a global pull on their sectors, bringing them together in a critical mass:

“ Sense of 'putting it on the map' is really important. Cultural managers, events, etc. from all over the world come – the most incredible mix of folk. (Cultural organisation)

“ No other example of that many technicians at one time in any given city. (Event producer)

This global gathering in turn amplifies the confidence effect on both creative talent (an impact explored in depth in the 2016 report on the Festivals' impacts) and audiences:

“ Knowing that Scotland is a place where literature is valued and has long heritage and contemporary expression is really important – seeing our leading

Scottish writers on a stage with leading international writers is liked by the audience. (Sectoral body)

Others pointed to the impact that the size of the Festivals has in their professional sphere:

“ ...these attract attention to Scotland that year-round or regional events wouldn't, they're just not on that scale (Sectoral body)

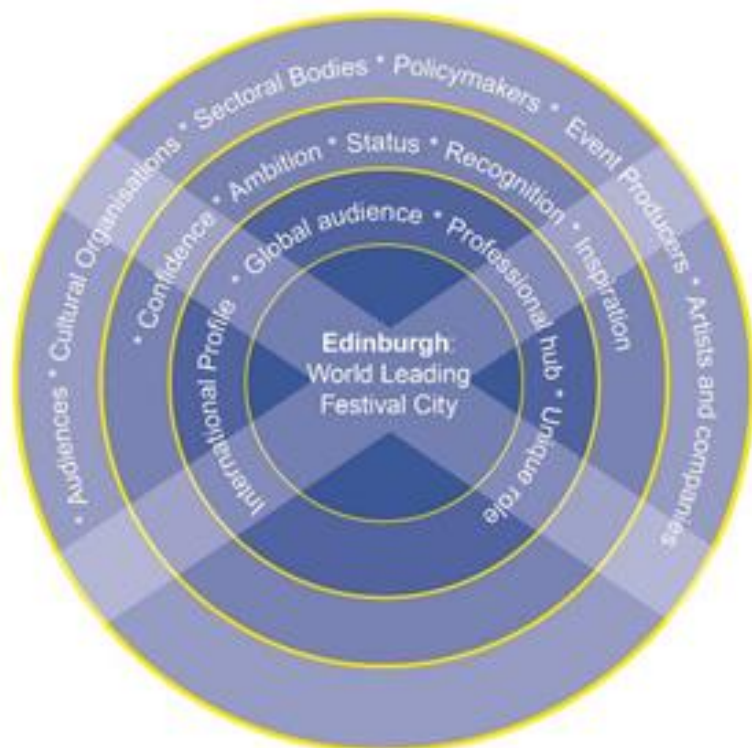
“ Festivals have such status that they give the sectors that they work in impact, politically (Sectoral body)

“ The Festival plays a special role in my planning as it is so big – though their reliance on us is tiny (8 – 10%) they are strategically important so we spend a lot of time on this relationship, they are such an international calling card. We very visibly support that project, because of the subsidiary benefits, the knock-on, the pride, that position as a sort of pyramid. The sheer scale of it – it can encompass so much of what happens in Scotland the rest of the year round. (Sectoral body)

Bringing these observations together, we can state that the global scale of the Festivals creates profile, audience, a critical mass of sectoral / creative attendees and a distinctive position not replicated elsewhere in the ecosystem. These factors create confidence, ambition, status, and recognition; these effects extend across audiences, cultural organisations and practitioners, event producers, sectoral bodies and policymakers. The way in which the benefits of a

globally recognised, large scale festivals hub extend across Scotland – the ‘halo effect’ as one interviewee described it – are represented in Figure 5 below.

**Figure 5 The Halo Effect’: The Impact of Edinburgh Festival’s Global Reputation on the National Cultural, Creative and Events Ecosystems**



Source: BOP Consulting (2018)

### 3.3 Conclusions and recommendation

What would happen without the Festivals?

“ a significant loss to the sector, loss of press attention to what is happening in Scotland, loss of opportunities for artists, loss of employment opportunities, loss of diversity in the ecosystem. (Event producer)

The role that the Festivals play in the wider Scottish sphere is intrinsic to their value. Such recognition is an important counterbalance to the less positive tone that some respondents noted as part of the view that “something taking place over 4 weeks in summer that is an international tradeshow is not great for everyone,” and a concern that the Festivals “eat up the attention.” It is important that the Festivals’ supportive and essential role within the wider cultural and events ecosystems is clearly identified, recognised and maximised.

The global scale of the Edinburgh Festivals is the foundation of all the Festivals’ impacts on the Scottish cultural and events sectors, as laid out in the following chapters. Each of these present further evidence as to why such concentrated, large-scale activity is beneficial across a wider area and this evidence should be gathered, amplified and shared.

**Recommendation:**

- **Embed the story of the Festivals’ role across Scotland in the Festivals’ impact narrative and the country’s cultural narrative**



## 4. The Festivals facilitate and support sectoral development

### Summary

The Edinburgh Festivals are visioned, designed and funded as festivals. They are not in themselves sectoral lead bodies, but they are valued by these bodies and in some cases embedded within organisations that take on sector development roles. Their key stories to date have been of the international, economic and city-wide benefits they bring – and these are the stories that interviewees found easiest to tell. But in addition to these impacts, the Festivals play an important role in the Scottish creative and cultural sectors at strategic level – as hubs, networks, key players, lighting rods, collaborators, colleagues. Some of this is formalised, much of it is delivered informally through personal contacts or as offshoots of other initiatives, and the Festivals provide an important forum for debate, not through specific initiatives but through the critical mass of attendees. The Festivals are therefore valued by sectoral lead bodies as important supports in sustaining and developing Scottish arts and events.

### 4.1 Overview of activities

The first Edinburgh Festivals were initiated seventy years ago and as the city's Festivals offer has grown to its current year-round programme of 11 major events, the dual ambition of delivering both local and international impact has developed at the heart of the Festivals' missions. The growth and development of the cultural, creative and events sectors in Scotland is the remit of the strategic funding lead bodies, Creative Scotland and EventScotland, with a range of organisations further supported to provide leadership and support in specific areas, for example the Federation of Scottish Theatres, Publishing Scotland, Scottish Book Trust, Literature Alliance Scotland, Regional Screen Scotland, Scottish Contemporary Arts Network. These organisations are

independent of the Festivals which celebrate their relevant sectors; Festivals are often 'members' of these sectoral organisations where appropriate, but the important relationships between these organisations and the Festivals are typically personal.

Of the 11 Festivals three do see themselves having a formal sectoral leadership mission:

- the Edinburgh Jazz and Blues Festival shares its staff with festival promoter Jazz Scotland; the two organisations are legally distinct, and staff split their time between both organisations
- the Scottish International Storytelling Festival (SISF), in concert with its home venue the Scottish Storytelling Centre, have a focus on developing the Scottish storytelling sector
- Imagineate, the parent company which runs the Edinburgh International Children's Festival, has as one of its three core purposes to deliver "an artform development and support programme for artists based in Scotland"

Whether in formal leadership roles or not, however, the Festivals deliver a range of activities both during their peak seasons and across the year which aim, either wholly or in part, to support the sectors in which they work. There is of course strong and positive overlap between supporting a sector as a whole and supporting the individuals working within that sector, whether in their creative careers (as is explored in depth in chapter 5), or through training (see chapter 7).

Snapshot lists of creative and cultural sector and individual support activities are included below in figures 6 and 8 respectively. In the event sector, networking opportunities were noted for their role in sectoral development but no specific schemes noted. A range of training initiatives, particularly for new entrants, were however discussed; those mentioned by interviewees and specific to the event production sector (and therefore not covered below) are listed in chapter 7.

**Figure 6 Cultural and creative sectoral support activity delivered by the Edinburgh Festivals**

<b>Festival</b>	<b>Activity</b>
Edinburgh Jazz and Blues Festival	Informal mentoring of individual musicians Raising profile of the sector, including by producing and sharing high quality marketing materials
Edinburgh International Children's Festival	Delegate programme for over 300 artists, bookers/presenters, local authorities, educationalists who access networking, social and discussion events
Edinburgh International Festival	Encounters training programme for early career programmers, producers, curators, artists and performers, jointly offered by the Festival, Royal Conservatoire of Scotland and Edinburgh University
SISF	'Storytellers Pass' for storytellers, cultural managers and educationalists, giving access to Festival events, professional networking and specific workshops Year-round artist mentoring Advocacy for children's right to the best theatre and dance
Edinburgh Festival Fringe	Largest International Arts Industry and Media Accredited programmes to support ongoing development and touring of work Fringe Central: a professional development centre and programme for creative industry professionals Made in Scotland curated showcase, an EXPO supported programme to showcase and prepare for international touring, the best of Scottish drama, dance and music at the Fringe
Edinburgh International Book Festival	Subsidised bookshop area dedicated to Scottish publishers Festival acts as hub for the literature and publishing sector On the Road programme supports partners across Scotland

	Dedicated literature strand of Momentum
Edinburgh Art Festival	Open call to all Scottish venues to participate Regular forums of key visual art venues to discuss Programme, Marketing and Learning Dedicated visual art strand of Momentum
Edinburgh International Film Festival	Industry programme for over 1200 filmmakers and industry delegates including events and networking
Edinburgh International Science Festival	Schools touring programme Training for science communicators
All Festivals Edinburgh members	Momentum programme with Creative Scotland and the British Council supports international cultural management and curatorial delegates – who network with Scottish national counterparts to promote trade, share knowledge and collaborate

Source: BOP Consulting (2018)

## 4.2 Impact across Scotland

There are four important, interrelated ways in which the Festivals support the national cultural, creative and events sectors.

### 4.2.1 Support Schemes

The wide range of sectoral support schemes delivered by or around the Festivals is known and appreciated only narrowly: individuals were aware of specific schemes according to their relevance to their own organisation and interests. These schemes were all viewed positively:

“ It's extremely evident how open the Festivals are in terms of how available and engaged with the wider

sector; it's just so frighteningly huge – you can only have a little bite of it. (Cultural organisation)

Though the scale of the Festivals' resources also suggested that there is untapped potential in this area:

- “ In general, those on year-round salaries are always more than happy to contribute to training (Sectoral body)
- “ We would like to do more, but can't do more due to resources and being too focused on delivering the events (Festival director)
- “ Huge amounts of talent within that organisation in terms of development, operational side – and this isn't shared across the sector. No mechanism, no time, no resources . . . (Sectoral body)

The recognition that what the Festivals can deliver is limited by time and money is important – and the Festivals' priority must always be to deliver on their core programme activities. In a context in which such sectoral support schemes are more clearly valued – either through discussion or through measurement – there may, however, be opportunities for festivals to identify opportunities to leverage resources from partners and funders for additional work in this area.

#### 4.2.2 Networking and network support

The Festivals deliver and participate in two distinct ways: as providers of networking opportunities, and as participants in networks.

That the Festivals are “hubs” which bring together a critical mass of peers is a hugely valued benefit. While some in the events sector felt that the Festivals' period was simply too busy to enable any networking, for others the main August event period was a critical time for catching up and bringing people together:

- “ good for morale, a place for people to come together and celebrate or drown their sorrows (Sectoral body)
- “ The Festivals and the venues all speak to each other. That's a resource that's undervalued; it keeps everybody's wagon rolling. (Event producer)

For the event sector, this informal networking is critical as there is little formal provision through conferences etc, which tend to be dedicated to audience development or funding and “the coalface workers [ie production] don't really get involved.”

- “ We get shared culture and aspiration – and the chance to mingle en masse. (Sectoral body)

It is interesting to note that the concept of a sectoral network was a holistic one, felt to include the audience as well as professionals. This distinguishes the networking opportunity that festivals provide from, for example, that of an industry conference.

The Edinburgh Festivals provide a networking service for their visitors, delegates, contributors, providing a specific opportunity to meet a large number of peers, rather than the general offer that everyone gets from 'doing' the Festivals themselves. The Festivals' unique scale make a difference and ensures they are a great network provider for peer support although this scale can both be an enabler of support and a barrier in the case of some smaller

regional local authority venues who sometimes find it difficult to see their context represented in the overall mix.

This is a good reminder of the need for a range of voices in the ecosystem, and that the Festivals' role is one part of a greater whole, albeit a very significant part: There are also, of course, the person-to-person networks that support any system and in which the Festivals, as a large employer, play a large role:

“ Across the country, loads of organisations and people in leadership positions have at one point worked in the festivals. Really important – again, that aspirational thing. That would apply on the technical side, too.  
(Sectoral body)

#### 4.2.3 Enabling discussion and change

Through the critical mass of professional attendees at the Festivals, vital discussion about the health and needs of the sector take place. Examples were given of both the event- and culture-related issues being surfaced in the context of the Festivals:

“ A few years ago, there was discussion about a skills shortage in specialist technical and people being brought in from the South. This is now being looked at by EventScotland, Creative Scotland and Skills people.  
(Event producer)

The Festivals become a conduit or lightning rod for discussion – the need to change the 24/7 culture of production working, innovative ways of presenting events, the value systems represented by funding decisions – these and others were cited as discussions which the existence of or attendance at the Festivals had enabled. Such discussion is essential for enabling change and ensuring the ongoing sustainability of a sector.

#### 4.2.4 Supporting sectoral lead bodies

The specific schemes, discussions and networking that the Festivals provide all contribute sectoral support and, thereby, to the sectoral lead bodies. But their support goes beyond this and is more specific, again, due to their unique role as a cohort of large-scale, global events:

“ ...we absolutely depend on the buy-in of the large organisations and the brainpower of their senior teams.  
(Sectoral body)

The Festivals lend the sectoral leads the support of their brand, status and scale; and this, critically, strengthens the sector's power of advocacy:

“ Some are leaders in the world e.g. EIF, and they can be a champion and ambassador for the sector. Sectors need leadership on all different levels and the Festivals provide a focus for this. (Cultural organisation)

“ Festivals shine a light on what goes on year-round, and the need for a strong network of year-round organisations – they provide advocacy for the need for year-round infrastructure. (Sectoral body)

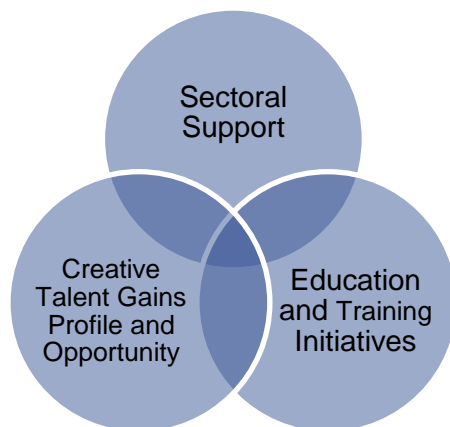
#### 4.3 Conclusions and recommendation

The combined Festivals offer of activity and opportunity provided for sectoral development is wide-ranging. Interviewees felt that the benefits to the sector of these major Edinburgh-based events were widespread. Furthermore the Festivals provide strong support to their sectoral lead bodies, further enabling sectoral development.

It was notable that whilst interviewees could cite specific activities or a general sense of sectoral good will between Festivals and their sectors, the story of 'how the Festivals' support sectoral development' was not one which came readily to mind - in contrast to narratives of international, economic, or Edinburgh-benefits, which have been well documented and are now firmly embedded within understandings of the Festivals' work. The level of appreciation of this as a key impact of the Festivals could be improved both internally and externally. This could be effected through knowledge sharing, growing the evidence base and creating a shared narrative of the Festivals' collective role.

We suspect that the list of support activity given above – drawn from information provided during this research – is incomplete. Updating and expanding the list of sectoral support activity would provide supporting evidence for the narrative. This will necessarily link in with further mapping of the career support provided to creative talent on the one hand, and training initiatives on the other, as illustrated in the figure below.

**Figure 7 How the Edinburgh Festivals facilitate and support sector development in Scotland**



Source: BOP Consulting [2018]

Other indicators of levels of collective sectoral support across Scotland that could be collected include:

- Number of partnerships with Scottish cultural /creative organisations
- Number of professional delegates
- Satisfaction and learning feedback from professional delegates
- Provision of networking, support, discussion or training events
- Participation in networking, support, discussion or training events

Looking ahead we believe this evidence is important to demonstrate the strength of the Edinburgh Festivals' sectoral support. Many funders already place a high value on sector development and may consider incorporating this further or more formally into a wider range of funding schemes. With this in mind, we recommend building on the initiative demonstrated by the commissioning of this report and continuing the work of evidencing and cohering this narrative of sectoral support provided.

**Recommendation:**

- **Gather further data, including participant experiences, to evidence the narrative of sectoral support**



## 5. Scotland's creative talent gains profile and opportunity

### Summary

There are different but interrelated benefits for different groups in the creative value chain, including individual producers, curators / distributors, venues and companies. Many of the Festivals were established historically as a showcase for international talent but have always included UK creative talent, and have in recent years been building their support to Scottish talent in particular with resources from the Scottish Government's Edinburgh Festivals EXPO Fund.

Each Festival has a distinct set of approaches and initiatives for showcasing, including or networking Scotland's creative talent. The opportunity to participate in the Festivals is highly valued as a sign of recognition, an opportunity to meet with and learn from international peers, to interact with engaged audiences and as a route to higher profile and market opportunity within and beyond the event.

### 5.1 Overview of activities

The Edinburgh Festivals are one of the largest global gathering of creative talent internationally and have always showcased Scottish talent. This latter element has received added impetus via the Scottish Government's Edinburgh Festivals EXPO Fund, which has at one of its three central aims "to increase the funding available to Scottish artists and practitioners." This change has been appreciated:

“ The Festivals are now more aware of their privileged position..... and being much more supportive.  
(Sectoral body)

The economic contribution this makes is significant: from our research, the Festivals (excluding Hogmanay) directly contributed:

— over £5.15m in fees to Scottish-based creative talent in 2016-17

Scottish talent appears both alongside their international peers and under specific spotlights, for example the Made in Scotland fringe programme at the Edinburgh Fringe or the Scottish publishing area in the bookshop at the Edinburgh International Book Festival. Other Festivals highlight Scottish talent less formally, for instance through a selection of Scottish work for key slots such as opening night or gala presentations.

In addition to creative practitioners themselves, professionals from across the cultural and creative value chain whose work impacts on the careers and opportunities of the creatives attend - distributors, curators, consultants, producers, presenters, bookers, agents, publishers, buyers ("we go there to shop!") – alongside a wide range of Scottish, UK and international journalists. This trade function, which creates commercial opportunity for the participating creative talent and other cultural organisations who attend ("the route to international and selling opportunities"), varies from festival to festival and is most noticeable in the Edinburgh Festival Fringe which accredits c1200 arts industry representatives and c1200 media each year and provides a platform for c800 Scottish shows.

### 5.2 Impact across Scotland

The benefits to participating creative professionals are significant and at headline level generic: in taking part, all performers receive the benefits of a professional engagement. Beyond the contractual they gain profile, opportunity to network internationally, the status of taking part in a prestigious global event, and access to a wide network of contacts who may commission or programme the current or future work. These two key central tenets around profile – gaining exposure and making money – are illustrated by the following quotes:

“ ...anyone’s first appearance at Edinburgh International Book Festival is a milestone in their career, no matter how successful they are (Cultural organisation)

Similar points were reiterated repeatedly by interviewees as key benefits to creative talent from the Festivals.

These are certainly key benefits for Scottish creatives, both within and beyond Edinburgh, in the same way as for any other creative professionals who travel in to attend.

“ Non-Edinburgh organisations do events in Edinburgh within the Festival in order to raise profile, gain platform and reach wider audiences (Festival director)

But respondents also felt that there were some specific benefits for creative talent from the role of the Festivals in the Scottish ecosystem.

“ Edinburgh Festival is an incredibly well respected global offering; in rural parts of Scotland, it is viewed with the highest regard and viewed as a destination for networks engaged in their sectors; for filmmakers, it is of critical importance. Relationship between these rural networks and Edinburgh Film Festival is really strong and important. It has proved an important conduit for expediting rural talent on to markets and facilitating that. Important to understand what’s happening on the ground and then connect it to something that’s so internationally visible – constantly provided additional

opportunities and access points to the marketplace for creative businesses. (Sectoral body)

This suggests there is a distinctly national network in which the Festivals support Scottish talent. The importance of this way in which the Festivals help “overcome Scotland’s complex geography” was mentioned several times: whilst Edinburgh is not the only place creative talent in wider Scotland goes to gain profile and commercial opportunity within Scotland or internationally, it has the benefit of being accessible and with the resonance of being on home turf:

“ It’s an opportunity for artists / curators to network internationally, and for Scottish arts people to feel that people have come to their country to see their work – a hugely positive force – alongside encountering new work with which you wouldn’t otherwise have contact. (Festival director)

### 5.2.1 Sectorally-specific benefits to creative talent

As well as the profile and opportunity benefits listed for Scotland’s creative talent and their enhancement by the Scottish context and networks, there are also specific benefits which interviewees pointed to in particular sectors.

Three examples serve to illustrate specific ways in which different Festivals create benefits for Scottish creative talent in testing economic and audience potential, feeding national venues and audiences, generating employment and driving innovation in Scotland in ways specific to the operation of their artform sectors:

- **Theatre.** Several interviewees pointed out that the Fringe’s role as a trade show is a great resource to the sector, especially programming teams, who saw a production’s time in Edinburgh as a means of testing ground (will it make money?) before booking shows into their own venues

“ It means that there’s a good vibrant, flexible economy out there – and there’s a lot of crossing of boundaries and innovation, as there should be. (Cultural organisation)

On the other hand, some complain of a ‘Festivalisation of product’ in which certain programmes take up too much space in the landscape, and are the wrong length (too short) and wrong type of content (aimed at cosmopolitan audiences) to travel to other venues.

— **Jazz.** The Festival is now the biggest employer of jazz musicians in Scotland, and also provides the musicians with artistic opportunity:

“ The festival has become the ‘engine room’ in terms of employment as it has allowed the development of collaborations and projects between musicians that can then also be picked up/taken elsewhere. (Festival director)

— **Children’s Theatre and Dance.** The Edinburgh International Children’s Festival trade showcase for companies plays a unique and essential role, giving productions a unique opportunity to be seen by potential bookers / presenters.

“ Very hard to get access to international children’s theatre and dance – no companies. The only place that they get to see it is at our Festival. (Festival director)

Other sectors can no doubt point to similar specific ways in which their creative talent is developed through the Festival experience; capacity and resource

associated with this study were limited such that other sectors could not be reviewed in depth.

## 5.3 Conclusions and recommendation

While making money is not the primary reason for creative talent to take part in the Festivals, there are clearly ways in which participants make money directly (during a Festival) or indirectly (as a result of the platform the Festivals provide).

The inspiration, innovation and international networking that the Festivals provide for creative talent is also vital to the ongoing health of Scotland’s creative sector and the cultural sector in which it operates.

The expenditure of the Festivals on creative talent based within Scotland provides an easily accessible and straightforward indicator of the economic benefit and level of involvement of Scotland’s creative talent.

Individual stories should continue to be gathered at Festival level and made available for collective illustration of how the Festivals help drive their creative ecosystems.

### Recommendation:

- **Gather further data, including participant experiences, to evidence the narrative of sectoral support**

## 6. Scotland's event production sector is resilient

### Summary

The impact of the Festivals on the event production sector must be set in the context of the Scotland-wide events strategy published in 2015, *The Perfect Stage*. Many of *The Perfect Stage* strategic objectives for developing the events ecosystem are clearly delivered by the Festivals, including building national reputation and international attractiveness; offering high impact events for residents and visitors; drawing on Scottish heritage and cultural assets; consideration of skills; and creating direct and indirect employment opportunities.

Interviewees highlighted that Scotland's event production business is limited by the size of the country, such that to fill specific skills gaps and ensure capacity the Scottish event production business must be viewed as part of a larger UK-wide ecosystem – and many of the key companies involved in fact work across the UK, and internationally.

The event ecosystem is allied beyond the cultural sector to other business areas (conferences, trade shows, corporate events etc). The Festivals' distinctive contributions are as a large-scale repeat client, which provides income and reduces risk; bringing reputational benefit through brand association; and generating inspiration. All of these increase the resilience of the sector.

### 6.1 Overview of activities

*The Perfect Stage* (2015) outlines a mission for the event sector in Scotland to function as one, held together by collaborations, knowledge sharing, and a single strategy:

“ To develop, through a one Scotland approach, a strong and dynamic events industry producing a portfolio of events and festivals that delivers sustainable impact and international profile for Scotland. (*The Perfect Stage*)

The Edinburgh Festivals, as 'signature events' within the national portfolio, play an important role in delivering on the strategy: they provide employment, enhance Scotland's reputation, attract visitors and play a supportive role in the events industry. It is this latter role – the Festivals' support to the Scottish event ecosystem – that has been explored in more depth through this research.

### 6.2 Impact across Scotland

#### 6.2.1 Event production expenditure

The Edinburgh Festivals (excluding Edinburgh's Hogmanay) spent in total £10.5m on event production in 2016-17, with 89% [£9.3m] of that spent with Scottish based companies

It should be noted that the report includes figures from the Edinburgh Festival Fringe Society but does not include the full costs for the Edinburgh Festival Fringe itself since, as an open access festival, such data is not held centrally but rather retained by individual promoters and participants.

As such it is clear that the findings represent a conservative estimate of the overall spend of the Festivals on event production.

#### 6.2.2 Business support and risk management

The level of expenditure by the Festivals on event production is not insignificant and it opens doors to positive relationships across the sector.

“ The Festival is one of our biggest customers – and the more a company spends, the more you are prepared to do. (Event production supplier)

Interestingly, however, it is not the size of the Festivals' expenditure that interviewees generally noted as important when considering the Festivals' role in the events sector. (And in fact, a number of event businesses were clear that, such was the scale of their own enterprise, the Festivals were not a make-or-break percentage of their income.) The importance of the Festivals to the event sector was underpinned by revenue, but came more from other aspects of the relationship. Status and political weight were relevant:

“ If EIF ask for things, these then get done in a way they don't the rest of the year – the local authority listen to them! (Edinburgh venue manager)

Brand association was also highly significant:

“ .....as part of the venue's identity and positioning as cultural venue it's very important (Edinburgh venue manager)

For a few organisations, the association with the Festivals also functioned in a marketing capacity, leading to other business through contacts made through Festivals networks. The regularity, predictability and year-round spread of Festivals activity were also noted as beneficial to planning, budgeting and ensuring a good spread of work: in short, to help manage business risk.

“ Very useful to have such a long-standing customer. (Event production supplier)

“ Hogmanay was a game changer – to do a major event over New Year was a first, and has now been copied all around the world. It was essential in creating work at a real down time for production crew, and has since extended into the longer period of the Christmas festival, and encouraged all sorts of other Christmas or New Year events. (Event producer)

“ The income is certain – it's not our risk – so it's all positive. Risk and staff planning are helped. Good to know when the Festivals will be and what they'll involve. Edinburgh Festivals plan in advance so are easy to deal with. (Edinburgh venue manager)

“ It's a symbiotic relationship. We have really benefitted and the Festival has really benefitted all the other shows. (Edinburgh venue manager)

### 6.2.3 Innovation

Whilst not a major impact (it was mentioned by only a few respondents), as in the creative sector the Festivals can spur innovation in event production.

“ As time goes on and developments are made in tech, new tech is needed by the shows. Companies that support have to be able to supply whatever the artiste demands! The more tech advances the more they need. (Event production supplier)



The creativity at the heart of the Festivals influences their production requirements, and production companies enjoy “being able to make fun things as well as practical things” and expanding their range:

“ When I tell the guys who do big shows in London what we do in Edinburgh their jaws drop to the floor!” (Event producer)

A specific example of this innovation dimension can be seen in the development of the Edinburgh-based company Red61 whose ticketing system was first developed for the Fringe, and is now in use by a number of the other Festivals as well as by other UK and international organisations – including the Abu Dhabi Science Festival (programmed and managed in collaboration with the Edinburgh International Science Festival). There is further considerable interest building across the wider cultural sector as the need to share services and work collaboratively becomes more apparent.

“ The experience of working with the Festivals both grounds and continues to drive global development in our business (Event supplier)

#### 6.2.4 The shape of the ecosystem

From the evidence of these interviews, the events ecosystem functions at three levels: across Edinburgh; UK-wide; and globally. The majority of event freelancers are local to the Festivals: given the costs of accommodation and travel and the short timespan of most contracts this makes sense. More senior professionals work UK-wide and see this as essential for accessing the volume of work required. But many are proud to stress that their links are global.

Freelance event technicians circulate around different Scottish (central belt) events – “lots of movement around the circuit and the Festivals are part of it” –

aided by the generic nature of the majority of skills required for the majority of events:

“ What do you need for an event? You need kit, a venue, music/sound, lighting, some crowd management – it’s all the same. Security, catering – the same. (Event producer)

It should be noted however that this circulation is geographically limited: staff are unwilling to travel far from their home base and accommodation costs make working away from home uneconomic.

The sector is also tightly networked, with limited opportunity for career development in the field:

“ There are 20-30 people in Scotland that know all you need to know about how to put on an event. They bring expertise and experience, but also a big contacts book. (Event producer)

“ People do have to move down south to get the meaty positions – there’s limited ladders up here. (Edinburgh venue manager)

Individuals have to look UK-wide for career progression; organisations have to look further afield for more specialist technical skills, for instance in gallery or museum lighting - the volume of work available in Scotland is not sufficient to support specialist resources to service Scotland alone.

The sector however also sees itself as global, at all levels: venues were proud of training new entrants from across the globe, and much personal connection and interchange was mentioned with the Australasian festivals in particular.

“ Other people aspire to it [...] Melbourne, Adelaide, New Zealand – run and generated by people who learned how to do it while doing the Edinburgh Festivals. (Event producer)

“ Without the Festivals there would be a huge gap in the industry and the workforce that support that, and in spaces for new material to be shared and picked up and taken round the world. And the same thing happens for technical teams – they get picked up and toured, or decide on a particular career path. (Event producer)

The event production side of the Edinburgh Festivals is competitive, commercial and enjoys a great reputation across the world.

### 6.3 Conclusions and recommendation

The Festivals provide the Scottish events ecosystem with three key factors needed for resilience:

- reliable income
- lowered risk
- competitiveness and a strong reputation.

They also provide a certain level of training and development, ensuring the flow of talent required, as will be explored in the following chapter.

That the sector is as much global as national is to be celebrated as a sign of Scotland's prowess as 'the perfect stage' and its development of globally marketable skills.

Issues in the sector – around pay, around a long hours culture, and a lack of progression – are already being surfaced; the Festivals will inevitably be drawn into related discussions and have a role to play in creating solutions.

#### Recommendation:

- **Embed the story of the Festivals' role across Scotland in the Festivals' impact narrative and the country's cultural narrative**

## 7. Formal and informal education and training initiatives are built around the Festivals infrastructure

### Summary

Recent decades have seen a step change in formal training opportunities for the cultural and events sectors, though informal entry routes are still common. The size, variety and concentration of Festivals in Edinburgh makes them a significant resource in the development of training initiatives in the cultural, creative and event production sectors. These include formal, accredited initiatives, informal schemes, and opportunities to learn. Some initiatives exploit the rich resources of the Festivals independently but the vast majority are actively supported by, or in partnership with, the Festivals. The event sector in particular is keenly aware of the importance of the training opportunity that the Festivals provide.

Many – but by no means all opportunities – are aimed at new entrants, especially for young creatives or technicians. Initiatives take place both during Festival time and outside it, when Festival staff are available to contribute to training programmes. The Festivals also provide experience and information for cultural and events professionals engaged in training schemes elsewhere, including teachers involved in arts and creative education.

The Festivals' size and scope make them a significant employer in the cultural sector of entry level, freelance and permanent staff. Many use the festivals as a jumping off point in the industry or move on to senior positions elsewhere. Skills and experience gained in the Festivals are a support to the nation's creative, cultural and events infrastructure.

### 7.1 Overview of activities

#### 7.1.1 Support for formal training

“ In terms of routes into the sector, in the past there were not many formal training entry routes, though this has changed a bit now and its more common for people to have formal qualifications. (Event producer)

The above quotation refers to the event production sector, though it could equally well apply to the sphere of cultural management. There are currently no formal event production / technical courses associated with the Edinburgh Festivals, but the cultural sector is richly represented through the association with Edinburgh Napier University, which runs one of the UK's main Festivals and Events training and research departments offering both BAs and MAs. The presence of this department in Edinburgh is not accidental, and the symbiosis with the city's Festivals (as part of the wider sector) is made very clear in the course prospectus:

“ During your studies you will be made aware of any volunteering or employment opportunities in Edinburgh's vibrant festivals, events, tourism and hospitality sectors. Throughout the academic year and during the busy summer festivals season in Edinburgh there are numerous opportunities to get involved with such opportunities [...]. As well as these opportunities [...] we have excellent industry contacts within Edinburgh and Scotland's tourism and festivals and events sectors. For example, all eleven of Edinburgh's Festivals' Directors are regular Visiting Professors. We have numerous

other industry and professional contacts across the sector who contribute to teaching. (University publication)

In the creative sector, the Festivals are again a key resource. The Royal Scottish Conservatoire of Music and Drama, for example, creates, performs and produces a Fringe show annually as part of the students' course, and a North American university likewise hires the Churchill Theatre each year for a similar scheme.

### 7.1.2 Support for informal training

'Informal training' refers to organised skills schemes which are not formally accredited. The range of informal training initiatives built around the Festivals offer is large, frequently developed opportunistically and through personal contacts – largely with Festival participation, though some schemes run independently.

**Figure 8 Informal training initiatives built with and around the Edinburgh Festivals**

Organisers	Initiative	Sector	Level
Youth Theatre Arts Scotland	Young Critics programme	Cultural (Theatre)	Taster / youth
Highland & Island Enterprise	TV and Film Production Talent Scheme	Creative / Cultural (Film & TV)	Early to Mid Career
Federation of Scottish Theatres	Bursary scheme for assistant producers and directors (can be used in Ed Fests)	Creative / Cultural (Theatre)	Early to Mid Career
The Hub	Stewardship training scheme	Event production	New entrant
Red 61	Speaking at University events	Event production	New entrant

Scottish Book Trust	Young Writers Programme	Creative (Literature)	Taster / youth
Edinburgh Art Festival	Santander internships	Programming/Marketing [visual arts]	Early / youth
Edinburgh Festival Fringe	Staged for Life	Technical [Theatre]	Early / youth
Scottish Drama Training Network, Edinburgh Festival Fringe	College Training Programme	Theatre	Youth
Edinburgh International Festival, Royal Conservatoire of Scotland and Edinburgh University	Encounters Programme	Cultural (general)	Early to Mid Career

Source: BOP Consulting (2018)

The list above is illustrative of the variety of schemes delivered, rather than complete.

In addition, much of the sectoral support activity listed in Figure 6 above also delivers training or professional development for individuals as well as sectoral support. The Momentum programme, for example, offers the opportunity to learn how to partner internationally to the Scottish participants; the Fringe Central programme offers workshops on sectoral issues, developing skills for existing professionals.

### 7.1.3 Opportunity to learn

For the event sector in particular, it is widely acknowledged that the ability to take part in live production work on a grand scale with considerable variety is a golden opportunity for new entrants to the sector, either fresh from formal training or at ground level.

“ The Festival is an amazing learning ground. We quite often have an extra junior in August (Event production supplier)

“ A lot of skills exchange. A good technician is rounded; they have knowledge of other ways of doing things – unique to festival. If you're on a rock tour you don't experience a different way to do things. A festival is a unique thing because they are doing something unique, e.g. audience on stage, company in audience. (Event producer)

And these opportunities are not just for the juniors: at all levels across the event sector, the networking is again referenced as important, serving individual as well as sectoral development:

“ We go to the pub and have a chat. Yes issues are surfaced. A lot of skills exchange. (Event producer)

In the cultural sector, the Festivals are “often a jumping off point for a career” and employ a lot of early career workers. Early, mid-career and senior professionals all benefit from the opportunity to learn and develop, that the Festivals bring through their scale and variety.

“ Not sure if there is a formal desire or obligation to provide professional development but it happens in ways that are not really measured. (Event producer)

Others note however, as above, that the Festival period is simply too busy for such activity – “there is not a lot of time for training and development – everyone is spread so thin!”

### 7.1.4 Support to creative education

The Festivals support the education system with specific schools-focused schemes, such as the schools tour delivered by the Science Festival or the artists-in-schools residency programmes run by the Children's Festival's year round organisation Imagineate. They are also used as a resource by other organisations looking to deliver creative education:

“ The schools team do go and scout at the Festival to see what authors are like in attitude and presentation with young people. Good to be aware of what people are doing – Edinburgh is on their doorstep – would go to other things if they were there, but wouldn't travel to them. (Cultural organisation)

And the Festival is of course a creative learning opportunity for its audiences, especially young people:

“ If it wasn't there many of the young people wouldn't realise at first that something had happened. But it would hit them within a couple of years – the narrowing of resources, the fact that they hadn't had a chance to



do a lot of stuff that their predecessors / older brothers and sisters had been able to do. (Sectoral body)

do when everyone has heads down and tails up. Need some basic skills qualification / accreditation / recognition; could be useful. (Event producer)

## 7.2 Awareness of the Festivals' offer

### 7.2.1 Cultural / creative sector

The resources that the Festivals have to offer – the volume of activity, duration, variety, and exemplary or new practice – offer a fantastic opportunity for individuals employed by the Festivals, and are attractive to organisations planning cultural or creative educational training. These initiatives have sprung up through personal interest and connections, or through proximity. The collective scale of this offer is significant and exciting – and leads to connections for the cultural and events sector that flow around the ecosystem in Scotland.

Across the interviews, however, whilst most individuals in the cultural sector were aware of some scheme or other, this overall picture was (in general) missing – even when speaking with those most closely connected with the Festivals. Whilst the offer and its impact across wider Scotland is a good one, the story is being missed amidst a tendency to focus on Edinburgh, international and economic benefits.

### 7.2.2 Event sector

In the event sector, there was a growing awareness that the Festivals had a distinct and special role to play in technical / event production training.

“ I've been talking to Queen Margaret Uni – Arts and Events training – and Edinburgh College – trying to work out work experience but had to establish trust.  
(Edinburgh venue manager)

“ A pipeline of skilled and experienced people would be a lovely thing to have – but it's the last thing you need to

Lack of time, occasion and clear sectoral leadership roles are barriers to developing the informal skills offer of the Festivals into a formal offer that would offer greater benefit to participants, Festivals, and the wider Scottish ecosystem.

## 7.3 Conclusion and recommendations

There is a huge range of formal and informal training and professional development initiatives that take place at the Edinburgh Festivals. The Festivals also support the education system with specific schools-focused schemes. They are also used as a resource by other organisations looking to deliver creative education.

These are currently opportunistic rather than strategic. There is an opportunity for the Festivals to make more of the platform they provide, and through greater visibility and some dedicated resource (web space, admin time) make their offer open to a wider group of cultural organisations for mutual benefit.

Leadership and advocacy are required to take the event sector's wish for more formalised training routes around the Festivals to the next level.

It would be beneficial to have a larger, stratified map of all training, professional development and sectoral support initiatives that take place in or around the Festivals to more fully evidence the strength of this offer and significance of the Festivals' role.

### Recommendations:

- **Formalise and develop the Festivals' role as technical training platforms**
- **Dedicate resource to opening up the Festivals to education and training partnerships**
- **Seize the initiative in developing the Festivals' role in the wider Scottish culture and events landscape**

## 8. Summary of Recommendations

### 8.1 Embed the story of the Festivals' role across Scotland in the Festivals' impact narrative and the country's cultural narrative

The Festivals deliver and enable high levels of activity in supporting the creative, cultural and events sectors and through the 'halo effect' have a significant beneficial impact on the creative and cultural sectors. This story of how the Festivals support and benefit the national sectors is neither well known nor well told - even by the Festivals themselves, despite the many initiatives they support personally and organisationally in this area.

This research report should serve as an effective starting point for building recognition of this story with the Festivals and moving towards embedding this narrative in their hearts, minds, strategies and websites. That the Festivals take their role as part of wider national ecosystems seriously should be made more apparent to funders, partners and the specific sectors with which they engage; much good work is currently below the radar or seen as contributing to other agendas.

### 8.2 Gather further data, including participant experiences, to evidence the narrative of sectoral support

Much relevant data is already gathered and reported by the Festivals individually but for robust support to this narrative of collective impact an ongoing aggregate data collection model is required. Potential data fields could include:

- range or number of partnerships, e.g. with other cultural organisations, educational or training initiatives, strategic bodies
- interaction with cultural / event sector professionals (number of attendees, role, home base)
- experience of visiting professionals (survey data around learning, networks, commercial opportunities)

Selective longitudinal alumni tracking (case studies of individuals or organisations) would also demonstrate the role of the Festivals as a developmental ground for cultural managers and event producers.

### 8.3 Formalise and develop the Festivals' role as technical training platforms

Several interviewees expressed a desire to develop the role of the Festivals in nurturing new technical talent. The richness of opportunity is very clear. Lack of time, resource and leadership in the event production sector are barriers to making this happen.

Leadership and advocacy are required, supported by aggregate data that would help build an evidence case for the Festivals' role and impact. This could be a range of existing initiatives for technicians; number of new entrants; quality of participants' experience; key skills learned.

It is important that any scheme is clearly differentiated from unpaid internships. Options include mentoring; internships / apprenticeships (especially across several events); formal networking opportunities; training campus using Festivals staff both during and outside of Festival time.

Mapping and gapping the skills needs in the technical / production side would also be an important step. Although beyond the scope of this study several interviewees indicated that there may be technical skills gaps in sound engineering or other production skills. Further research is required to substantiate these views.

### 8.4 Dedicate resource to opening up the Festivals to education and training partnerships

The work of the Festivals with school-based education is already well known from previous research. What is revealed here is the remarkable range of training/education initiatives from 16 upwards - not in culture generally, but in cultural / event-related skills – for example young critics programmes, formally accredited HE fringe productions, stewardship training, skills sessions or technical apprenticeships. At present, these initiatives are chiefly opportunistic

and developed through personal contacts. Dedicated resource could expand this area of work and its known impact.

Data collection around the range of the schemes, participants and participants' experience would be valuable.

### **8.5 Seize the initiative in developing the Festivals' role in the wider Scottish culture and events landscape**

There is a lot of activity and goodwill across the Festivals towards supporting new talent, Scottish peers and the cultural sector. It is also clear that this is not joined up strategically or achieving its full impact as a collective offer. Improved strategic oversight and monitoring will deliver higher visibility, with further benefits to delivery. Skill sharing, mentoring and networking schemes from organisations in a major cultural centre with a wider region, for example select European Capitals of Culture, could provide useful models.

The Festivals receive a significant amount of available public funding support and have done so over time: more is therefore expected of them than of others in contributing to sectoral development. (This point was noted by interviewees). Such an expectation has long been the case for the Museums and Theatre sectors in the UK, where the large 'nationals' are explicitly required by their funders to share expertise and services with smaller institutions (e.g. the Tate Plus network, the British Museum's touring exhibitions and loans programme, the National Gallery's science and conservation capacity, etc).

## 9. Case Studies

### 9.1 Overview

The light-touch case studies below were each selected for two reasons:

- the event bore some point of comparison with the Edinburgh Festivals
- the events had focused on an area of activity relevant to the recommendations made by this study.

All of the organisations contacted were interested in this research and open to further conversation at a future time.

### 9.2 Design Indaba

**Point of comparison:** Multi-disciplinary festival aiming to put city and nation on the global stage.

**Learning potential:** Supports both culture and creative economy as a matter of policy.

#### 9.2.1 Creative festival as catalyst for wider ecosystem development

Design Indaba – an annual ‘festival of creativity’ which has become akin to Africa’s version of SxSW or TED combined with cross-disciplinary cultural performances — started in 1995 on the heels of the end of apartheid. Founded by Ravi Naidoo, the inception of the event was a concerted effort to help shape both Cape Town and South Africa’s creative ethos and industries as the country began the process of rebuilding itself.

In the 23 years the festival has been running, it has grown from 200 to over 40,000 attendees and has played a pivotal role in the development of Cape Town and South Africa’s creative economy. Design Indaba has effectively seeded an ecosystem which has since led to the development of a host of

cross-sectoral cultural and creative institutions – governmental (a more robust City Department of Cultural Affairs), NGOs (Creative Cape Town, Cape Town Partnership), and academic (Cape Craft and Design Institute and the University of Cape Town’s new design school) and contributed to the securing of a number of international cultural designations, including Cape Town as World Design Capital in 2014 and in 2017 Cape Town becoming Africa’s first UNESCO City of Design.

#### 9.2.2 Operating from a four-pillar philosophy of impact

Founder Naidoo has identified four main areas where he sees the impact of Design Indaba and its role in supporting the wider regional cultural and creative sector:

- *Development and support:* The organising team for Design Indaba pay concerted attention to how they are creating opportunities outside of the duration of the event itself. They regularly work to bring globally renowned creatives to town to speak at the festival and to assume visiting professorships at universities and businesses schools throughout South Africa, hosting workshops and masterclasses. Design Indaba has also partnered with the University of Cape Town to offer free business classes to select promising creative talent through the Business Acumen for Artists programme.
- *Marketplace development:* As will be detailed in the following section, Design Indaba has worked to develop a marketplace running alongside the event to give young and emerging creative talent a physical platform to connect with new commercial opportunities.
- *Awareness:* Design Indaba views the awareness—both in terms of the number of people from across the world who attend the physical event and watch it being simulcast and in terms of the media attention (both nationally and internationally) garnered through its platform—as important contributors to South Africa’s larger creative and design ecosystem.
- *Activist work:* As part of festival programme, the Design Indaba team initiate new projects that take on a life beyond the event itself. For example, in 2017

the architecture firm Snøhetta announced and unveiled onstage a design for a new honorary memorial for South African Archbishop Desmond Tutu. 'When the genius leaves the festival, and we're still able to use the brain trust of people who work with us and then employ regional architects and artists in their creation based on what developed initially at the event. These projects are a living testament to the power of coalescing these energies in one place during the event, then taking that energy and converting it into action afterwards.

“ But while it is tempting to be blinded by these numbers, the real value of the Design Indaba may not be in the cash it generates. While hard to quantify, there is real value in how the event supports artists and craftspeople, providing a platform for entrepreneurs and small businesspeople in need of a venue to showcase their wares as well as a market and consumers to sell their goods to. It gives them the opportunity to gain a foothold in competitive industries and provides an initial boost, making it easier for them to become sustainable businesses in the long run.” - Walter Baets: Director of the University of Cape Town Graduate School of Business

### 9.2.3 Event as marketplace and providing a platform for emerging talent

Acknowledging its role in enabling a wider entrepreneurial creative ecosystem, in 2004, Design Indaba launched an expo as an extension of the festival. The expo evolved into a significant destination for international buyers looking for the most promising new design talent on the continent and has launched the careers of a new generation of local and regional creative talent, for many, providing their first opportunity to exhibit and commercialise their work. In many

cases these designers were able to fill their orders for the year at the event. A report carried out by University of Cape Town Business School found that in 2015, the expo created direct employment for 465 people in the Western Cape, and 502 indirect jobs.

The Design Indaba Expo in particular provided an important platform for enabling 100s of South African creative SMEs to scale their production and business efforts. This success—and the emergence of a new scene of design stores and shops and institutions in the city—made Design Indaba decide to phase out the expo in its previous format.

“ Our mission was to facilitate growth within the South African creative economy that could transcend our borders. At the time, there was no strategy for design in the province, there was no opportunity to showcase creative work through the year, and South Africans were not buying locally designed product. The concept grew from strength to strength, and over its 11 years, the platform grew from 40 exhibitors in 2004 to over 600 exhibitors in 2015

Design Indaba continues to run an Emerging Creative programme during the event, which brings 40 promising design graduates to the festival each year. The festival pairs them with world class creative talent for masterclasses and individual mentoring.

“ When you curate a conference, it's not just about content—it's about curating the audience and doing a bit of matchmaking as well. And too many creative events become mutual backslapping. So we also aim to ensure a certain percent of our audience are potential



commissioners of creative work to add that snap and crackle into the mix.

### 9.2.4 Leveraging strategic partnerships for creative sector benefit

Since its inception, a hallmark of the festival has been sponsorship and partnerships with the private sector. But rather than viewing these relationships through a purely fiscal lens, Design Indaba works to develop functionally strategic partnerships with sectoral development activities embedded within them.

For example, Design Indaba's relationship with Nando's has resulted in all of their stores globally now being furnished by South African designers featured during the event. And most recently, Design Indaba used the 2017 festival to roll out a new partnership with IKEA whereby a group of creatives from across the continent collaborated on-site with IKEA's in-house design team, using the festival as a 'living laboratory' to prototype designs for the furniture retailer's first African collection. The collection is currently set to go to production, and expected to be launched in Spring 2019.

### 9.2.5 Conclusion

When Design Indaba formed in 1995, Cape Town –and the rest of country—had virtually nothing in the way of government or affiliated policies dedicated to the cultural and creative industries. In the 23 years the event has been running, Cape Town has evolved into a globally recognised creative city with a burgeoning creative industries support ecosystem. The region has produced a Western Cape Design Strategy focused on the sector, the city has produced a designated events strategy for 2014 –2030, and the city has increased the capacity and activities of its designated Department for Cultural Affairs and Sport.

## 9.3 Melbourne Writers Festival

**Point of comparison:** Festival city modelled on Edinburgh (and with which it is highly connected)

**Learning potential:** Regional strategic agency is commissioning research into sharing resources (staff, expertise) across the festivals and region's cultural ecosystem

Melbourne is one of the world's most active festival cities and Victoria one of the world's most active festival regions. Between 2017 and 2018 Creative Victoria undertook a comprehensive review of the state's 450 creative industry festivals—including many small and niche festivals—to assess their wider impact and potential. When published in 2018, the review—the first being carried out by the region in a decade—will feature specific recommendations encouraging the continued vibrancy and sustainability of the sector including how to share resources, staff, and create employment opportunities across festivals. Whilst the review is not yet complete, Creative Victoria commented that it would great going forward for the cultural festivals across Melbourne and the rest of Victoria to have access to trained and professional technicians and ticket operators and to create a pool and combined resource approach to operations.

### 9.3.1 Shared capacity building to develop a more diverse literary sector

Melbourne in particular now sees a robust and vibrant year-round programme of cultural festivals. The Melbourne Writers' Festival (MWF) - supported by Arts Victoria - is now in its 32<sup>nd</sup> year feature over 350 local and internationally claimed authors, sees over 70,000 attendees over the course of its 10 day programme

In addition to the readings, storytelling, live performances and art events that make up the public-facing elements, the MWF also engages in a series of

industry development activities during the event including workshops and masterclasses. For example, a reviewing masterclass offered was aimed at “develop[ing] the next generation of reviewers and critics, and rais[ing] awareness of gender imbalances and other crucial elements of Australian critical culture. These practical workshops seek to foster a richer, more equitable, diverse and engaged critical culture, which is aware of gender imbalances, unconscious biases and other ways in which representation is skewed or inequitable.’<sup>4</sup> The reviewing masterclass was made possible with support from the Copyright Agency’s Cultural Fund.

The Melbourne Writers’ Festival has also been working to promote diversity and equity in Victoria’s literary sector. A collaboration between the MWF and the Emerging Writers Festival has been working to ‘develop broader cultural diversity in strategic programming, audience and participant’.<sup>5</sup> In a shared capacity building exercise, the two festivals have pooled resources and coordinated efforts to bolster diversity, hiring a joint Multicultural Programme Coordinator to ‘initiate and develop programming which showcases the work of Australian writers from culturally and linguistically diverse (CALD) backgrounds, and to increase the access of CALD audiences to reading, writing and literary programming’. This initiative has also led to new partnerships across community and cultural organisations and with local councils.

### 9.3.2 Developing partnerships with literary festivals around the world

In addition to engaging in innovative partnerships with other festivals in Melbourne, MWF also engages with peer festivals globally through the Word Alliance – an initiative originated by the Edinburgh International Book Festival. The Word Alliance is an international network of literary festivals working together to develop joint initiatives to provide unique opportunities to local talent, promote co-creation and co-curation. Other member festivals include the Edinburgh International Book Festival, Berlin’s International Literature Festival, International Festival of Authors (IFOA), New York’s PEN World Voices Festival

of International Literature, and the Jaipur Literature Festival. These festivals work together to:

- Convene the directors of each festival to exchange ideas and information around programming development and to collaborate on unique projects to promote all of the festivals individually and collectively
- To provide international opportunities for local creative talent
- Collaborate on author exchanges
- Work together to discover and pursue new sources of funding and to lobby government and the wider cultural sector, particularly in relation to international engagement
- ‘Work jointly to seek and lobby for new sources of funding for international and cross-festival projects and build relationships with decision-makers in festival territories.’
- ‘Guarantee the quality of new and locally unknown international writers appearing at each Alliance festival and provide opportunities for guest curatorships and increased international programming.’
- ‘Share expertise by offering opportunities for staff exchanges, mentoring and placements.’<sup>6</sup>

MWF utilises this network of eight leading international literature festivals, together with funding from Australia Council, to promote Australian writers to the world. ‘This collaboration has resulted in the execution of global literary projects such as bringing Jaipur Literature Festival and the Edinburgh World Writers’ Conference to Melbourne, ensuring that Melbourne City of Literature has a place on the global literary stage.’

<sup>4</sup> <http://mwf.com.au/the-stella-prize-reviewing-masterclass/>

<sup>5</sup> <https://hmstrust.org.au/case-studies/melbourne-writers-festival/>

<sup>6</sup> <http://www.wordalliance.org/>

## 9.4 Belfast AVA Festival

**Point of comparison:** Major arts festival with significant city investment

**Learning potential:** Established specifically to support national cultural / creative ecosystem

### 9.4.1 Launching a new festival with field-configuring<sup>7</sup> in mind

A few years ago Sarah McBriar launched Audio Visual Arts (AVA) as a one day festival in Belfast with the aim of creating a new anchor cultural event in Northern Ireland. AVA has since evolved into ‘Ireland’s leading electronic music conference and industry network’. The two-day event now marks an important part of Belfast’s cultural calendar and has since launched spinoff events in Mumbai, Amsterdam and East London.

“ As it stands, McBriar’s AVA Festival has galvanised Northern Ireland’s electronic music scene and has helped showcase its talents further afield. Not bad for a festival that is less than two years old. – Irish Times (2016)

### 9.4.2 Nurturing Northern Ireland’s creative ecosystem

McBriar had previously spent years working on renowned cultural festivals in the U.K. including Glastonbury and Manchester Festival, and saw a noticeable void in Northern Ireland events celebrating and elevating the region’s cultural sector and talent. With that in mind, AVA has an emphasis on Irish talent (from

both Northern and [mainland] Ireland, with internationally renowned electronic creative talent brought in as special guests.

A central aim of the curation of AVA is to encourage cross-disciplinary creative collaborations among Irish creative talent. AVA has, for instance, built partnerships with international music media Boiler Room, broadcasting Irish artists at the event to an audience of over 12 million internationally.

AVA has now expanded into a wider platform, hosting international electronic music showcases – and in all cases, AVA’s organisers programme and bring along Irish talent. AVA typically works with a team of 150 people during the festival—through a mix of staff, temporary workers, and volunteers—giving people in the region the skills and experience necessary to then go work in larger markets in the U.K. including London and Manchester.

### 9.4.3 Building education into the design of the event

According to McBriar, the aim of developing the surrounding music and arts community is core to AVA’s DNA. Since the first edition, AVA has hosted a concurrent conference dedicated to exploring the latest industry trends, all sessions of which are free and open to the public in order to inspire the next generation of DJs and electronic music talent in Northern Ireland.

The conference features workshops, industry talks, ‘native sessions’, designated networking events, one-on-one mentoring, and an emerging talent record fair. These sessions are led by many of the globally recognised music talent performing at the festival and music showcase. The conference is also looking to advance significant topics in the industry including the role of women in electronic music and the potential impact of Brexit on the sector.

“ It’s important for what we are and who we are - I didn’t want to start a brand and a festival that didn’t have an industry development element. The talks and

<sup>7</sup> This is a term that has been coined by some academics that have looked into the role of festivals as wider sector development organisations (see Literature Review below).

conference element was central part of what the event we were creating was about. It's about developing something strong and quite unique and able to really engage artists and industry

#### 9.4.4 Engaging with peers around the world

Outside of the event itself, McBriar also makes it a point to engage with industry peers and networks, including She Said So, a global network of women working in the music industry, which AVA has hosted breakfast events with. And at SxSW in 2017 McBriar appeared on the panel 'Electronic Music in the Festival World' with other leading festival organisers from around the world.

The development and expansion of AVA has been made possible through partnership and collaborations with Generator NI, Tourism Ireland and Belfast City Council.

### 9.5 European Capitals of Culture

**Point of comparison:** Edinburgh Festivals effectively deliver a European City of Culture (ECoC) offer year on year

**Learning potential:** Specific strategies to extend ECoC benefits across regional cultural ecosystems.

#### 9.5.1 City-wide festival as a catalyst for sustainable cultural sector impact

The European Capital of Culture (ECoC) programme, dating back to 1995, has been studied extensively in both academic and grey literature. It has been tracked in media and academic studies and found to have a catalytic and transformative impact on host cities and regions both during and after the yearlong festival.

The report [European Capitals of Culture: Success Strategies and Long-Term Effects](#) examines the wider cultural impact these celebrations have had: by generating momentum; facilitating / seeding new long term partnerships; inspiring more collaborative ways of working; and delivering capacity building for the wider cultural sector. The report finds evidence across ECoC host cities that many have seen long-term positive cultural sector impacts and noted that in many cases there are 'new cultural activities that endure beyond the title year, improved networking and co-operation between stakeholders in culture, and new and improved cultural facilities':

##### *Increased capacity building*

- A case study of **Stavanger** (ECoC 2008) found that 'new knowledge, new ideas and new methods' emerged for those cultural actors who participated in the event and 80% of those surveyed felt that their involvement had a role to play in 'innovation in their production of culture and art' and 70% felt their involvement enabled them to take on bigger and more ambitious projects afterwards.
- As a result of being a European Capital of Culture, **Porto** (2001) found that the festival had helped to develop a 'new generation of cultural managers, many of whom still work within the field'
- For **Cork**, European Capital of Culture for 2005, a study conducted by Quinn & O'Halloran noted that cultural organisations and practitioners felt that ECoC provided them with a necessary learning curve, allowing them to '[try] out different kinds of activities, undertaking work on a different scale and developing new skills'. Many also responded that the programme exposed them to new influences, new venues and connected them with new audiences

##### *Enabling new networks, collaborations and structures*

- **Rotterdam** (ECoC 2001) established a new network for emerging cultural entrepreneurs in the year following the designation
- Over 90% of the cultural projects involved in **Turku's** ECoC year (2011) acknowledged developing new contacts and networks during the year

— A survey of cultural actors involved in the implementation of **Stavanger** as ECoC in 2008 found that most had developed stronger ties with their peers in the sector –locally, nationally and internationally—and two-thirds felt that the programme had ‘contributed to the establishment of new arenas for collaboration for the cultural life in the region’ and to more joined up approaches.

### 9.5.2 Marseilles and Provence

In 2013, Marseille-Provence acted as the European Capital of Culture. Prior to the programme, Marseille faced a number of urban challenges — a large but predominantly poor population, high levels of unemployment, low levels of skilled workers, and significant income inequality. The bid for the programme was designed to highlight and revitalise both the city and wider surrounding region.

Over the course of the festival, 950 projects were put on across the region, attracting over a million visitors<sup>8</sup>.

One of the key aims from the programme outset was to fundamentally ‘change the way that cultural players operate in the Marseille-Provence territory’. The ECoC galvanised small and mid-sized cultural operators and mobilised a diverse group of stakeholders across the region, building new connections between the cultural sector, local authorities, regional government Chamber of Commerce.

According to an evaluation of the 2013 ECoC for the European Commission, the Marseille-Provence programme had a significant configuring effect on cultural actors in the region, particularly in both directly and indirectly facilitating new partnerships and collaborations, including new financial partners and new collaboration across different areas of the territory.

The programme also served to strengthen the skills and capacity of those cultural actors engaged in the delivery, with over 70% of projects noting that they either developed new skills or strengthened existing ones. Identified skills

developed were ‘management of institutional partnerships (50%), project management (49%) and conception of cultural projects (47%)’.

Marseille-Provence 2013 worked to ensure the volunteer programme would be linked to paid opportunities, acting as a pipeline for those looking to enter the creative workforce.

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<sup>8</sup> <https://ec.europa.eu/programmes/creative-europe/sites/creative-europe/files/files/ecoc-2013-full-report.pdfm>

## 10. Appendix 1: Literature review

### 10.1 Objectives of the literature review

Main aims:

- To situate BOP's research into the impact of the Edinburgh festivals as a cultural sector development actor within a wider international context of research
- To determine the extent to which the core question – to what extent festivals and large-scale cultural events shape their surrounding cultural sector ecosystem — has been explored in both academic and grey literature
- To examine how specific the cultural sector outcomes of the Edinburgh Festivals are and to benchmark them against other cultural events and festivals around the world
- To identify any gaps or alignments with the main body of the impact study, in particular with the interview findings

Search phrases used:

- 'sector development' 'impact' 'festivals and cultural events' 'creative industries' 'skills' 'training and development' 'cultural sector' 'field-configuring events'

### Synthesis of findings

- The majority of academic research surveyed on the wider impact of large cultural events and festivals is focused on economic impact or the impact on their host cities. There appears to be very limited existing academic research devoted to the wider creative and cultural sector impact of these events.
- Another dominant research perspective sees festivals through the lens of mega-events. This literature places festivals alongside large sporting programmes as tools for economic development, regeneration and city branding. Unfortunately there has been little examination of these cultural events through a cultural policy or creative industries development lens

- The concept of 'Field-Configuring Events' is an interesting one, although underdeveloped as applied to large scale cultural events and festivals
- As far as the grey literature, the majority of results yielded were media articles and blog posts which were event-specific and descriptive, as opposed to looking at larger trends and themes and providing original analysis across events
- Programming activity conducted by individual cultural events and festivals emerged in response to search terms fell into a number of categories: providing scholarships, fellowships, and mentoring opportunities; programming industry knowledge events; engagement with issues of equity and diversity in the cultural sector; creating new platforms to elevate emerging talent; festivals and cultural events as marketplaces; and developing a year-round physical footprint



## 10.2 Academic literature review

### An acknowledgement of the research gap on the role of cultural festivals in sector development

The majority of academic literature dedicated to the wider impact of large-scale cultural events and festivals centres on economic and quantitative impact.

Some of the research surveyed specifically highlights this gap in evidence:

“Evaluative research has, until very recently, focused predominantly on economic benefits. This is despite a growing awareness of the potential limitations of results attained from the application of economic models alone and the growing pressure on public authorities and cultural festival organisers to account for the benefits (and costs) of staging these events in terms of social policy and public funding.”<sup>9</sup>

This acknowledged limitation of the methodologies and hypotheses used to measure and evaluate the wider significance of festivals has led to the establishment of an initiative at Edinburgh Napier University’s Centre for Festival and Event Management (CFEM) to “advance the methodologies and knowledge base of socio-cultural festival evaluation and, through industry and academic liaison, produce a robust, comprehensive set of indicators”<sup>10</sup> that will examine the sectorial and sociocultural outcomes of these events instead of relying predominantly on economic impact as a basis for measurement.

### Cultural festivals as ‘field-configuring’ events

The role of events – specifically conferences, trade shows, fairs and festivals — in supporting their wider industry and sector development has been theorised by Joseph Lampel and Alan D. Meyer under the terminology *field-configuring events (FCEs)*. FCEs are identified by those events that encompass and shape the development of professions, markets, and industries and are settings where

people from across an industry and with varying motivations can come together within a bounded space and time in order to “announce new products, develop industry standards, construct social networks, recognize accomplishments, share and interpret information, and transact business”. FCEs have the potential to strengthen and reorient their respective sector and are often constructed with industry evolution in mind.

The defining characteristics of FCEs are identified by Lampel and Mayer as:

- assembling actors from diverse professional, organisational, and geographical backgrounds in one location
- whose ‘duration is limited, normally running from a few hours to a few days’
- providing both structured and unstructured opportunities for face-to-face social interaction.
- ‘include ceremonial and dramaturgical activities’
- ‘are occasions for information exchange and collective sense-making’
- ‘generate social and reputational resources that can be deployed elsewhere and for other purposes’<sup>11</sup>

Within the cultural and creative industries, festivals, fairs, and other large-scale events act as FCEs by bringing together a large and diverse group of actors within the sector with varying agendas and motivations. Some will come for entertainment and leisure, others “to trade (to buy or to sell products exhibited); others to obtain financial support for projects; others to build or maintain social relations and networks; yet others to engage in some form of reputation-management”. Fairs and festivals also attract actors tangentially connected to the sector, including press.<sup>12</sup>

<sup>9</sup> Progressing socio-cultural impact evaluation for festivals, Journal of Policy Research in Tourism, Leisure and Events, 2009

<sup>10</sup> <https://www.napier.ac.uk/research-and-innovation/research-search/outputs/place-values-process-and-benefits-accounting-for-the-social-and-cultural-future-of>

<sup>11</sup> Field-Configuring Events as Structuring Mechanisms: How Conferences, Ceremonies, and Trade Shows Constitute New Technologies, Industries, and Markets

Journal of Management Studies, Vol. 45, No. 6, pp. 1025-1035, September 2008

<sup>12</sup> Moeran, B. and Strandgaard Pedersen, J. (2012). Fairs and Festivals: Negotiating values in the creative industries. Cambridge: Cambridge University Press.

Brian Moeran and Jesper Strandgaard Pedersen of Copenhagen Business School note that the “research on field-configuring events (FCEs) is still at an early stage, but existing research suggests that such events as art fairs and biennales, film and music festivals are especially important within creative fields”.

### **Film festivals as cultural sector brokers**

Film festivals in particular have been identified in the literature as cultural and creative sector for a [?] that directly function as field-configuring events by facilitating four of the mechanisms which define FCEs: “enabling increased communication and interaction; providing sense of common interests; facilitating structures of dominance; and allowing transformation of capital”.<sup>13</sup> Film festivals create and enable the development and exchange of ‘cultural, social, and material capital’ via the festival programmers and curators, the jury, and the directors and producers of the in-competition films being screened. Different actors within the film sector—filmmakers, distributors, and industry media—converge, using the festival as a marketplace, a laboratory for new ideas and to market test new work, to network, and to explore the latest industry trends.

A profile of the Guanajuato International Film Festival (GIFF) for the journal *Transnational Cinemas* found that the event has had a wide and transformative impact on the development of Mexico’s film sector. In the 20 years since the festival started, Mexico’s film industry has grown from only nine feature films produced annually to over 100 films co-produced in Mexico in 2012.<sup>14</sup>

Nearly all programming associated with GIFF, including screenings, masterclasses and workshops, are free and open to the public. GIFF also runs a mentorship scheme to encourage a new generation of Mexican filmmakers, giving them the necessary training, support and guidance to advance in the industry. GIFF does through different programmes including an International Pitching Market, hosting pitching workshops for filmmakers in advance of the event to learn how to ‘to professionally pitch their projects to potential investors and collaborators’; the MexiCannes summer residency programme, and an

incubator consultant programme. GIFF has also fostered partnerships with sector bodies including Mexico’s Writers’ Guild, Mexico’s Fund for Film Investment, Mexico’s Motion Picture Association, the Bilateral Commission Mexico-USA for film industry development, and Mexico’s Congressional Commission for Radio, Television and Cinematography.

The role of GIFF as a cultural sector actor is indicative of a larger trend for film festivals around the world, particularly in Europe, which increasingly engage directly in industry activities—‘coordinating sales markets, co-production markets, and/or film funding awards or film-maker residencies as part of their overall mission’. These events –including Cannes Film Festival, the Berlin International Film Festival, International Film Festival Rotterdam, and, in the United States, the Sundance Film Festival—are exploring ‘how markets function as a complimentary distribution network and/or how funds and related initiatives are shaping and reshaping traditional production networks’. In some cases, such as Sundance, the festivals are directly investing in films and filmmakers.

## **10.3 Grey literature review**

The majority of the grey literature surveyed represents examples of what specific events and festivals are doing to drive sector development by providing new and unique opportunities in the form of scholarships, fellowships, mentoring, and networking opportunities; sector knowledge development through industry-specific programming and training and skills development workshops; and by brokering new partnerships and commercial opportunities.

### **Providing scholarships, fellowships, and mentoring opportunities**

Festivals spanning music, design, and film are using these events as ground to provide opportunity, particularly for those beginning or looking to advance their careers in the cultural sector.

<sup>13</sup> International Film Festivals as Field-Configuring Events, PhD Thesis, 2008

<sup>14</sup> From ‘Expresión en n <Corto’ to Guanajuato International Film Festival: The rise of regional support for Mexican cinema in national and international contexts, *Transnational Cinemas*, 2014

The Cape Town International Jazz Festival, the largest annual music event in Sub-Saharan Africa, runs a concurrent cultural journalism fellowship—now in its 14<sup>th</sup> year—giving arts and cultural writers and photojournalists the opportunity to practically develop their skills and hone their craft, in telling unique cultural stories while building their portfolio. Included in the fellowship are a series of short courses, workshops, masterclasses, and performances that allow fellows to hone their knowledge and ability to reporting any arts topic, whether for traditional press, broadcast or new media.’ This gives them the opportunity to use the festival as a launchpad to ‘drill down to the heart of the story and format it into newsworthy and engaging copy.’<sup>15</sup>

The Hamptons International Film Festival offers mentorship opportunities through a screenwriters lab programme that takes place outside of the event. The lab provides a forum to develop emerging talent by enabling one-on-one mentoring, pairing established and renowned screenwriters, directors and producers with emerging screenwriting talent<sup>16 17</sup>.

And the Montreal Jazz Festival, in partnership with TD Bank, offers the TD Grand Jazz Award, offering a \$5,000 grant to promising Canadian jazz musicians, and ensuring them a performing slot at the following year’s festival.<sup>18</sup>

## Programming industry knowledge events

A number of events surveyed have developed specific programming in the form of panels, talks, and workshops specifically designed to advance knowledge and dialogue within their respective industries.

The BFI London Film Festival holds a concurrent industry events programme for filmmakers and industry professionals. The stated aims of the programme are to

“stimulate debate, address areas of policy key to growth, share knowledge, generate business opportunities, as well as develop and showcase talent”<sup>19</sup>.

The programme features leading experts from across the film industry including numerous Oscar winners. Industry topics covered include navigating casting and production finance, the future of public film funding and finance, increasing diversity in film crew hiring/development; promoting equality for disabled film and television talent, promoting gender balance in the VFX industry; the impact of Brexit in film negotiation, how to develop new and younger audiences, and skills sessions focused on costume design.<sup>20</sup>

The Brighton Early Music Festival has worked to elevate knowledge and skills development in the music sector by organising and hosting a day-long workshop at a separate time of year from the festival itself and taking place in London “exploring innovative ways to approach marketing and programming in order to reach new audience and is open to both emerging and established artists across the early music sector and beyond”<sup>21</sup>. Topics covered include creative marketing, press engagement, using video, audio and new media to expand reach, and collaborating with promoters.

Understanding its role as an important actor in Northern Ireland’s music ecosystem, the AVA Festival—a new electronic music festival taking place annually in Belfast—works closely with bodies across the sector including with Generator NI, Tourism Ireland, and Belfast City Council. AVA has also developed a designated track of programming of industry talks and panels “designed to assist and inspire the next generation of electronic producers and DJs in Belfast”<sup>22</sup> including a session on women in electronic music, in an effort to spur dialogue and action towards a more diverse and equitable sector. All of the sessions in this educational track are free and open to the public<sup>23</sup>.

<sup>15</sup> <http://www.capetownjazzfest.com/single-post/2016/01/01/How-the-2016-Cape-Town-International-Jazz-Festival-grows-new-arts-writers-and-photographers>

<sup>16</sup> The Hamptons Lab pairs up-and-coming scribes with established screenwriters, directors and producers for a weekend of one-on-one mentoring sessions.

<sup>17</sup> The Hamptons Lab pairs up-and-coming scribes with established screenwriters, directors and producers for a weekend of one-on-one mentoring sessions.

<sup>18</sup> <http://www.montrealjazzfest.com/en/About/DeveloppementDurable>

<sup>19</sup> (Press release) BFI LONDON FILM FESTIVAL ANNOUNCES INDUSTRY EVENTS PROGRAMME FOR FILMMAKERS AND INDUSTRY PROFESSIONALS (2017)

<sup>20</sup> *Cineuropa*, *The London Film Festival boasts a strong industry section*, 2017

<sup>21</sup> <http://bremf.org.uk/livetrainingday/index.htm>

<sup>22</sup> Vice, *Belfast’s AVA Festival Have Announced a Huge Lineup for 2016*, 2016

<sup>23</sup> AVA Belfast - An electronic festival determined to do its own thing, *The Irish Times*, 2017

## Engaging issues of equity and diversity in the cultural sector

The 2016 edition of the BFI's London Film Festival used the event as an opportunity to elevate discussion around issues of diversity inclusion in the film industry. As part of the event, London Film Festival hosted the Black Star Diversity Symposium, led by actor David Oyelowo, to specifically address the issue of on-screen representation of the black community. The symposium sought to "bring together actors, filmmakers, and industry leaders to discuss why opportunities for blacks remain limited and what can be done to effect positive change"<sup>24</sup>.

Sheffield Doc Fest's 2017 programme made a concerted effort to increase dialogue and develop new initiatives aimed at widening and expanding the film pipeline in order to "[unlock] talent from widest geographical, social and BAME backgrounds" including new programming such as the new BBC Northern Docs Pitch, the new Reggie Yates' Doc/Dinner, impact of Brexit discussions; Maxine Peake on Northern and class stereotypes; new UK Talent Delegations for widest festival access.<sup>25</sup> Sheffield Doc Fest has also developed an interactive site, Doc/Player to extend its reach beyond the festival itself, creating a platform that highlights documentaries seeking 'sales, distribution and screening opportunities' alongside video of talks and sessions from the festival itself<sup>26</sup>.

## Creating new platforms to elevate emerging talent

A number of events surveyed have established new platforms within their programme specifically designed to elevate emerging talent in the sector. For example, Montreal's world renowned comedy festival *Just for Laughs*, which sees over 2 million attendees/visitors annually, has been running its New Faces initiative, now in its 20<sup>th</sup> year, to give budding comedians a forum/opportunity to advance in the industry and a forum to be able to exchange ideas with their peers<sup>27</sup>. 'We realized we could try to create an environment where we could

foster creativity—where we could create opportunities for artists to advance their careers not just in Hollywood'.

Cape Town's annual Design Indaba Festival of Creativity, through its Emerging Creatives Programme, presented in partnership with the Department of Arts and Culture, has sought to use the event to raise the visibility of young graduates and professionals in the design and craft sector. Participants in the programme—which provides support, mentoring and education for emerging design talent from across the continent—have gone on to exhibit/show in Milan, Paris, London, and other global design capitals.

## Festivals and cultural events as marketplaces

As will be further detailed further in the Design Indaba Case Study, in 2004 the event launched an expo alongside its annual festival creativity to create a physical marketplace for designers across the continent<sup>28</sup>. At the time, there was no existing creative economy development strategy for the region and there were limited opportunities for South African designers to showcase their work to a wider market.

According to Design Indaba, 'the concept grew from strength to strength, and over its 11 years, the platform grew from 40 exhibitors in 2004 to over 600 exhibitors in 2015'<sup>29</sup>. According to an economic impact assessment conducted by the University of Cape Town Graduate School of Business '465 people in the Western Cape owe their employment directly to the platform, while 502 jobs were indirectly sustained'. The marketplace gave these designers the opportunity to connect with over 800 domestic and international buyers and the general public.

## Developing a year-round physical footprint

An innovative set of festivals in North America is exploring ways to work with the cultural sector to create a physical footprint outside of the duration of the

<sup>24</sup> Variety, London Film Festival Bridges Cultural Divide, 2016

<sup>25</sup> <https://sheffdocfest.com/articles/513-festival-roundup-2017>

<sup>26</sup> <https://sheffdocfest.com/articles/513-festival-roundup-2017>

<sup>27</sup> How The World's Biggest Comedy Festival Is Leading The Industry's Charge, Fast Company, 2017

<sup>28</sup> Design Indaba Cape Town: 20 years on, the creative economy thrives - and could even compete with mining, Daily Maverick, 2014

<sup>29</sup> <http://www.designindaba.com/articles/design-indaba-news/way-forward-design-indaba-expo>

festival. In Austin, TX Fusebox, a city-wide festival featuring both local and international visual and performing artists, has hosted a 'living charette' during the event through the thinkEAST initiative to develop a new cultural centre as part of a 24-acre piece of land in East Austin. The developers of the site have tasked Fusebox with leading the process on concept development for the project, engaging artists and other creatives during the festival.<sup>30</sup> In 2016, Fusebox received a \$400,000 grant from ArtPlace America and partners including the City of Austin's Cultural Arts Division to host a 'living charette' – an 18-month process working with thinkEAST's primary stakeholders (Govalle and Johnston Terrace neighbourhood residents and local creatives) and gathering public input at community meetings' to reimagine the site.

Fusebox Founder and Director commented on the impetus for the festival taking on the project: "We wanted to focus on the big issues Austin is facing right now. Both our artists and longtime residents are facing displacement, and this project focuses on dealing with those issues in a responsible and a sustainable way."<sup>31</sup>

"The landowners approached Fusebox about creating a living "charette"—a place where artists could live, work, create, exhibit and perform. During the festival, the land was turned into a pop-up village where audience members participated in the process by sharing thoughts on what they would return to see if it were in the space."<sup>32</sup>

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<sup>30</sup> Fusebox Festival creates a pop-up village as part of its thinkEAST Living Charrette, Austin Chronicle, 2013

<sup>31</sup> <http://www.americantheatre.org/2015/04/20/playing-outside-the-fusebox-a-texas-festival-expands-its-civic-vision/>

<sup>32</sup> American Theatre Fusebox article

## 11. Appendix 2: Detail on Festivals' supply chain spending

The data provided by the Festivals has been considered in aggregate and not at the level of individual Festivals. This is appropriate to the exploratory nature of the research, which aims to map, not evaluate, current activity.

The difference in size and approach of each Festival however is significant, and the range of their activities varies enormously:

- the percentage of a Festival's total spend on fees for creative talent ranges from 0% to 60%, depending on the sector and the nature of performers' involvement (film directors, for example, typically appear in exchange for hospitality and the showcasing opportunity, whereas performers in the Tattoo are primarily appearing in a paid, professional capacity)
- total costs for event staging (including staging, sets, marketing, promotion, lighting, sound, insurance, and freelance but not core staff) range from £82K to just over £5m, and as a percentage of total Festival budgets from 5% to 80%
- individual Festivals, due to the nature of their events, can have strong 'outlier' effects which skew the picture dramatically

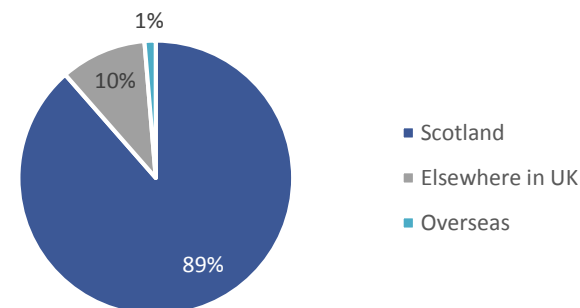
We have already noted earlier that the figures on expenditure does not include Edinburgh's Hogmanay on the grounds that it had just moved to new management, such that its model of operation was both new and in transition.

It should be further noted that the report includes figures from the Edinburgh Festival Fringe Society but does not include the full costs for the Edinburgh Festival Fringe itself since, as an open access festival, such data is not held centrally but rather retained by individual promoters and participants.

As such it is clear that the findings represent a conservative estimate of the overall spend of the Festivals on both event production and creative talent.

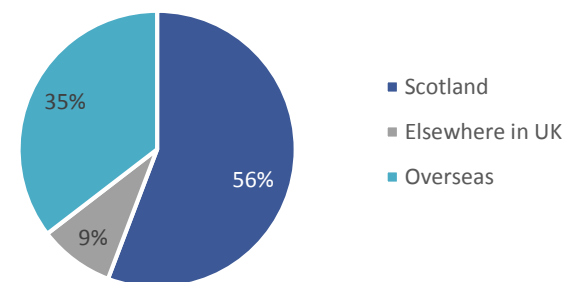
When considered collectively by geography, however, it can be seen that the Festivals' expenditure is significant.

**Figure 9 Edinburgh Festivals total spend on event production, by geography, 2016-17**



Source: Edinburgh Festivals / BOP Consulting (2018)

**Figure 10 Edinburgh Festivals' total spend on fees to creative talent, by geography, 2016-17**



Source: Edinburgh Festivals / BOP Consulting (2018)



The scale of activity in Edinburgh is apparent from these charts, showing that in 2016-17 the Festivals spent:

- collectively, on all areas of operation, in excess of £31.5m
- collectively £10,471,315 on event production,
  - with £9,271,573 of that spent with Scottish based companies
- collectively £9,275,327 on creative talent,
  - with £5,162,843 of that spent with Scottish based individuals and organisations
- total spend on event production and creative talent in Scotland was £14,434,416
  - representing 46% of the Festivals' collective total expenditure in these areas

These figures provide a valuable financial underpinning to the qualitative evidence of the Festivals' ecosystem roles. Looking across the data collected at the three recent research points (2010, 2015, 2017), levels of variation in the figures were too great to allow for trend analysis. Changes in event production costs for another festival varied by millions, in no consistent direction. In addition to differences in Festival operation and administration of financial data, it seems clear that these differences would need to be explored at granular level in their individual contexts to understand the changes in funding, projects, and approach that these differences illustrate. Sadly it is not possible to draw any general conclusions on the themes of this study from the longitudinal analysis.

We have suggested refinements and additions to the data collection model for future years that would evidence the Festival impacts that have now been identified qualitatively, and which would hopefully be trackable over time. It should be noted that even delivering pre-existing data (albeit in a new format) was challenging for the Festivals and the process took more time than anticipated; this limitation in resourcing should be borne in mind when planning for future collective data collection.

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BOP Consulting is an international consultancy specialising in culture and the creative economy.

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