

# EDINBURGH: CITY OF IMAGINATION

2030 Vision for a  
Resilient and Ambitious  
Festival City

Found the seats, lit the fire, drew us close  
to coorie down, let the world in, made space  
for story, for song, for dance, for moments  
that we collected an held, left us  
in community wi more than our neighbours  
– the whole world, an when the whole world  
became oor front rooms, you kept the welcome  
going, kept us looking beyond our shrinking  
borders, asked us to keep dreaming  
in stories that would transform  
Edinburgh, can't help but invite it  
a city of imagination birlin in the harr

FROM 'RARE EDINBURGH NIGHT' BY HANNAH LAVERY, EDINBURGH'S MAKAR

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# Executive Summary

In 2019 the Edinburgh Festivals and Festivals Forum stakeholders launched a mid-term review of their previous strategy and began developing a new future vision reflecting on the latest opportunities and challenges. After the Covid-19 pandemic struck, this work was updated to propose principles for how the festivals and the festival city could rebuild and support wider renewal in a changed era.

The festivals needed to adapt while holding onto fundamental purposes. They identified their unique value as being to connect people, inspire creative ideas, and bring places alive in concentrated moments of communal celebration – focused on combining the local, the global and the live.

A series of collective conversations gathered feedback from local residents through Community Councils, from artists and creatives through Creative Edinburgh, and from businesses through Edinburgh Chamber of Commerce. This was part of a wider period of reflection and rethinking by individual festivals and others at local, national and international levels.

The result of this collective internal research and external discussion is our agreed **2030 Vision to be a world leading sustainable festival city**, with six ambitions to protect and develop our position encompassing shared values of being globally minded, locally rooted, and creatively led.

- 1 Global Solidarity:** Edinburgh's Festivals are proudly internationalist, a defining value since their foundation – and it will be vital to see festivals, national agencies and governments at all levels working together to push for the best possible conditions for the free exchange of people and ideas across borders.
- 2 Valuable Skills and Work:** The festivals rely on, and help nurture, Scotland's wealth of cultural talent, connecting them with international peers and ideas – and it is imperative to rebuild opportunities for Edinburgh's artists, workers and traders, along with Scotland-wide pathways for creation, production and participation, and the national events supply chain.
- 3 Connected Local Communities:** Prior to the pandemic, Edinburgh's Festivals had developed extensive links with city community groups and

schools – and for festivals to create deeper relationships with community and education partners will require sustainable longer-term resourcing of wider cultural and social services, as well as of the programmes themselves.

- 4 Vibrant, Sustainable, Gathering Places:** Edinburgh's citizens value their festivals for the communal joy they bring, the pride they create, and the livelihoods they support – and to redevelop successfully will require investment for works of excellence, innovation and risk, and integrated multi-year planning from local and national authorities.
- 5 Net Zero Carbon Future:** Edinburgh's Festivals recognise that in order to flourish, they need to find innovative, sustainable ways of operating in a net zero carbon future – and they have created a shared carbon reduction route map which identifies how they will reduce emissions in line with Edinburgh's goal to be a net zero carbon city by 2030.
- 6 Increased Resilience, Partnership and Investment:** The Covid-19 crisis brought into stark relief the fragilities of the entire culture sector, especially its long-term financial sustainability and ability to invest in change – and it is a priority to identify new investment and partnership models that can support maximum resilience and public value.

Aligned with each ambition of the 2030 Vision are two actions, twelve in total, that will be taken forward by the different festivals and festival city stakeholders – as outlined on the next page. Brought together, the vision, ambitions and actions provide a powerful framework to regrow Edinburgh's international festivals cluster, succeeding the 2015 strategy Thundering Hooves 2.0.

Edinburgh's festivals are vital to Scotland's culture, economy and place in the world, and they will be at the heart of the recovery and renewal of our capital city. Together they form a portfolio that is distinctively Scottish and fiercely international – and this 2030 Vision enables us to build upon these solid foundations with the collective effort and leadership required to ensure that Edinburgh's Festival City flourishes even in uncertain times.

## Actions

### Global Solidarity

- > Edinburgh's Festivals will champion 21st century enlightenment, with Scotland as a global cultural hub for thinkers and creatives
- > Edinburgh's Festival City stakeholders will support festivals' international missions, reach and relevance, demonstrating Scotland as a creative, open and progressive nation

### Valuable Skills and Work

- > Edinburgh's Festivals will rebuild and maximise access to the skills, employment and development opportunities the festivals create
- > Edinburgh's Festival City stakeholders will sustain the maximum possible long-term funding for festivals' core programmes, to secure the public value of the work they generate

### Connected Local Communities

- > Edinburgh's Festivals will deepen equitable community partnerships and connect local with global ideas
- > Edinburgh's Festival City stakeholders will explore ways to strengthen wider year-round community and cultural capacity

### Vibrant, Sustainable Gathering Places

- > Edinburgh's Festivals will work to sustain our capital's world leadership in unique creative live experiences
- > Edinburgh's Festival City stakeholders will examine how integrated multi-year planning can be strengthened across local and national levels to secure long-term benefits

### Net Zero Carbon Future

- > Edinburgh's Festivals will plan and implement actions to reduce festivals' direct emissions in line with city 2030 net zero targets
- > Edinburgh's Festival City stakeholders will work towards decarbonisation of cultural infrastructure, power and transport systems

### Increased Resilience, Partnership and Investment

- > Edinburgh's Festivals will create cross-sector partnerships to attract resources for renewal of festivals & cultural provision
- > Edinburgh's Festival City stakeholders will identify new investment models and streamline shared public funding metrics and reporting to maximise efficient use of funds

# CULTURE GOES TO THE HEART OF WHAT CONNECTS US



# Foreword

Susan Deacon CBE, Chair, Edinburgh Festivals Forum

Edinburgh's Festival City was born in the wake of World War Two, as a place to bring people together through culture. Standing on the threshold of a daunting new era in July 2022 – after two years of global pandemic and in the festivals' 75th anniversary year – it is time take inspiration from those visionary founders and re-imagine how to fulfil this fundamental purpose.

*Edinburgh: City of Imagination* is the product of a sustained collaborative effort by the city's international festivals and their major stakeholders to map out how we can rebuild resilience for our festivals in the short term, while working towards a more sustainable long term future for our Festival City.

It tells the story of how and why Edinburgh came to be a world leading festival city and the impact our festivals have had – locally, national and globally. It reflects on how the festivals have become central to Scotland's culture, economy and place in the world; the challenges of rapid growth Edinburgh was experiencing prior to the pandemic; and how the world around us is changing. And, most importantly, it identifies shared ambitions and agreed actions for the future.

Edinburgh's world leading status has been achieved due to the scale and range of our festivals which together form a portfolio that is distinctively Scottish and fiercely international. As we work together to renew and rebuild our Festival City, after two deeply damaging and disruptive years, it is vital that we nurture these precious assets while continuing to adapt in a changed era. The seismic shifts caused by Covid, Brexit and conflict in Ukraine, together with the ever more pressing need to address the climate emergency, require us all to think and work differently in the future.

*Edinburgh: City of Imagination* presents the new 2030 Vision for a world leading sustainable festival city. This provides a robust framework within which the festivals and their major stakeholders can work together with others to safeguard and renew our Festival City, both now and in the future. This work builds on the progress and collaborative approach which has been developed over the past 15 years in taking forward the previous Thundering Hooves strategies, while now setting out a fresh future direction.

Since 2007, the development of the Festival City has been supported by the Edinburgh Festivals Forum, a strategic advisory body comprising leaders from key national and city funders and partners which I have had the privilege of chairing since 2016. I am immensely grateful to the members of the Forum, past and present, and to all the member organisations – which include the City of Edinburgh Council, Scottish Government, Creative Scotland, VisitScotland, Scottish Enterprise and British Council – for their contribution, expertise and insights.

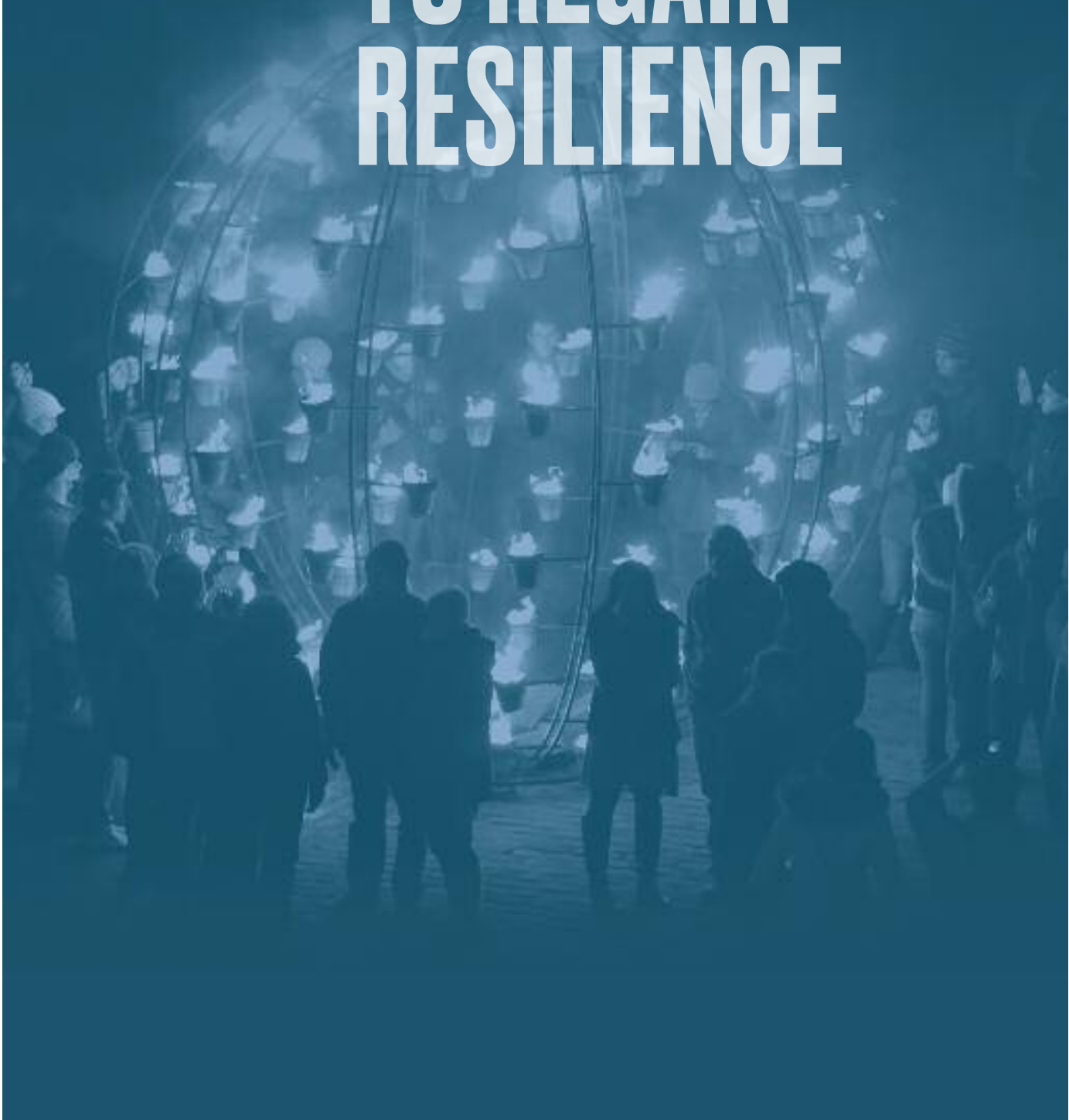
I would also like to thank all those people and organisations across the city who took time to be part of conversations that informed and influenced this work; and of course, the festivals themselves for their input – and their tremendous agility, creativity and determination in weathering this deep crisis.

Culture goes to the heart of what connects us as we seek to face the global challenges of our time. I hope that the ambitions and actions set out here will help forge the renewed leadership and collective effort needed to support a renaissance for Edinburgh's Festival City. In our disrupted and potentially destructive age, ensuring that this extraordinary exchange of ideas can flourish will help people to navigate the uncharted territory ahead – bringing the world to Scotland and Scotland to the world; and cherishing for generations to come the sense of joy, insight and belonging that come from cultural discovery.



A full list of Edinburgh Festivals Forum members can be found at [www.edinburghfestivalcity.com/about/core-partners](http://www.edinburghfestivalcity.com/about/core-partners)

**WE ARE  
WORKING HARD  
TO REGAIN  
RESILIENCE**





# Introduction

Dr Simon Gage OBE, Chair, Festivals Edinburgh

Edinburgh offers an unparalleled range of festival experiences to audiences from near and far in our uniquely beautiful city. These features mark us out as a distinctive cultural capital and have made our reputation as a world leading festival city.

Our group of eleven international cultural festivals offers the crucial advantage of being able to deliver a wide range of aims. The largest festivals in peak seasons contribute hugely to Scotland's global reputation, creative industry networks and employment. They work alongside our world-class festivals in other seasons, who have international reach in their own areas of focus, and in many cases also specialise in creative and community development. The story told in these pages uncovers the achievement of powerful and perhaps unexpected benefits, as well as constraints and challenges that need to be addressed.

Two years of Covid restrictions have shown how badly people missed cultural and communal experience. This time has had a major impact on arts and events workers, small traders and cultural organisations – and even brought Edinburgh's major festivals to the brink of existential crisis. The heroic combined efforts of creatives, crews, organisers, partners, funders and supporters managed to avoid that, and we want to thank them all.

Now – in the 75th anniversary year of our founding festivals – we are working hard to regain resilience after being one of the last industry sectors to fully re-open following pandemic restrictions. We are starting to regenerate industry networks locally, nationally and internationally, and we are laying the pathway for the ambitious changes that will be needed for the long term.

With all the present risks to business models, even if public health can continue to be managed without any future Covid restrictions, many festivals will need to continue working to regain a new stability until at least 2024. And with the degree of global uncertainty, challenges and cost pressures, no industry has long-term predictability or the technical solutions needed for 2030.

So we see this decade as a journey of three phases, working with all our supporters: a transition to resilience by 2024/25; resetting and evolving approaches towards the 2030 Vision by our Festival City's 80th anniversary year in 2027/28; and by 2030/31 being able to demonstrate how we have reimagined and reorientated our events for a sustainable, net zero carbon future.

The climate crisis is the most profound challenge of all, and we are returning with a clear commitment to secure continual carbon reductions against 2019 levels. We do not underestimate the longer-term change required – and, along with the whole of society, we have not yet mapped out the entire journey – but we have begun it with rigour.

In areas of common need and opportunity like this, our collective development body Festivals Edinburgh will have a vital role in supporting and sometimes delivering on our shared priorities. Working in partnership with the key funders and stakeholders on the Festivals Forum is also critical, to focus on the key areas that can help most in rebuilding and revitalising the benefits our festivals offer.

This vision sets us on course for integrated action. It is the starting point for each festival to consider the shared ambitions and identify their particular areas of contribution; and for joint efforts across the festivals, funders and stakeholders to identify policy directions and interventions for us to thrive as a world leading sustainable festival city in this decisive decade.

> Information on Festivals Edinburgh can be found at [www.edinburghfestivalcity.com/about](http://www.edinburghfestivalcity.com/about)

# Edinburgh's Festivals: Overview

## Spring Festivals

### Edinburgh International Science Festival

The world's first science festival and one of Europe's largest

### Edinburgh International Children's Festival

World renowned children's festival presenting exceptional theatre and dance for young audiences

## Summer Festivals

### Edinburgh Jazz and Blues Festival

The UK's largest independently run jazz and blues festival

### Edinburgh Art Festival

The UK's largest annual festival of visual arts, including a programme of public realm commissions

### Edinburgh International Festival

Founded in 1947, the world's leading performing arts festival, featuring the finest performers in dance, opera, music and theatre

### Edinburgh Festival Fringe

One of the world's great celebrations of performing arts, with a purpose to give anyone a stage and everyone a seat, inspiring a global movement of 300 Fringe Festivals

### The Royal Edinburgh Military Tattoo

An iconic Edinburgh institution and one of Scotland's leading cultural brands

### Edinburgh International Film Festival

The world's longest continually running film festival, emphasising new talent, discovery and innovation

### Edinburgh International Book Festival

A world leading celebration of books and ideas

## Autumn/Winter Festivals

### Scottish International Storytelling Festival

Inspired by Scottish tradition and centred around the world's first purpose-built centre for storytelling

### Edinburgh's Hogmanay

Edinburgh's iconic New Year party, highlighted as one of the 'Top 100 things to do before you die'

# Edinburgh's Festivals in Numbers



For notes, see Annex A on page 25



# **1 THE FESTIVAL CITY STORY SO FAR**

## Why Festivals?

**Festivals have been around as long as human history. Down the centuries such gatherings have taken many forms, but they all tap in to a deep urge in people to put aside their everyday concerns and come together for a moment of communal celebration.**

At the beginning of the twentieth century, European classical music festivals such as Bayreuth and Salzburg put the emphasis on prestige and addressing elite audiences. By the era of post-Second World War Europe, new festivals were promoting a culture of reconciliation. At the same time, a democratic spirit began to emerge that saw festivals as important meeting places for creativity, sociability and debate.

The power and value of such festivals also began to be recognised by governments and their agencies. Cultural bodies focused on the creative impact of festivals. City authorities embraced the social role of festivals in enhancing community cohesion and civic pride. While others identified the key role festivals could play in tourism, and in delivering economic impact to a location.

Over the decades many festivals worldwide have lost their way amidst such competing agendas. The danger is to lose sight of the fundamental essence of a festival around those concentrated moments of communal celebration, without which there is no unique appeal distinct from other cultural forms. From the time of the ancient Greek tragedies, Aristotle had identified his 'unities of time, place and action' as being vital to the power of drama – and, appropriately enough, these ideas put down deep roots in the 'Athens of the North' – Scotland's capital city, Edinburgh.

## Festival City Foundations

The first festivals to appear in 1947 – the Edinburgh International Festival, the Edinburgh Festival Fringe and the Edinburgh International Film Festival – did so in the context of the devastation of the Second World War and

the desire to use culture as a healing balm to bring peoples and nations back together. The City of Edinburgh Council's visionary Lord Provost expressed their founding aim as being to 'provide a platform for the flowering of the human spirit', which could find no better home than the city of the Scottish Enlightenment, where world leading thinkers of their time well understood the value of internationalism, co-operation and trust in building a better future.

Throughout the next decades – joined by the Royal Edinburgh Military Tattoo in 1950 – the festivals' reputations continued to grow. They were often in the vanguard with journeys of cultural discovery including *Beyond The Fringe* which prefigured the satire boom of the sixties and seventies; the International Writers' Conference that would change the world of literature; the Fringe fairytale of Tom Stoppard's *Rosencrantz and Guildenstern are Dead* transferring straight to London and New York; the seminal exhibition *Strategy: Get Arts* curated by Richard DeMarco, often cited as the most important post-war development in Scotland's visual arts; and the appointment of Lynda Myles in 1973 as the first woman to run an international film festival.

Starting in the seventies a series of further festivals emerged that focused on specific genres driven by representatives from the city's creative communities: from the Edinburgh Jazz & Blues Festival, through the Edinburgh International Book Festival, the Scottish International Storytelling Festival, Edinburgh Science Festival and the Edinburgh International Children's Festival, to Edinburgh's Hogmanay and the Edinburgh Art Festival. Each festival was not only rooted in the capital's history but also branched out into the city's contemporary cultural landscape, blending the old and the new.

## Collective Strategy

By the early years of the new century each of these festivals was enjoying individual success and international renown, with many other festivals and cities seeking to emulate Edinburgh. In response, the Thundering Hooves report in 2006 (metaphorically named after the sound of the competition catching up with Edinburgh) was commissioned by the festivals and key public funders, to examine the state of the festivals world.

Amongst its recommendations were that the city's festivals and their partners should think more strategically and work more collaboratively. As a result, two new bodies were created: Festivals Edinburgh – a company run collectively by the festivals to further their shared agenda for cultural, social and economic impact – and the Edinburgh Festivals Forum – a high-level strategic advisory board bringing together senior leaders of those bodies with a stake in helping shape the environment within which the festivals operated.

This unique collaborative infrastructure was put in place in 2007: little did those involved know that the financial crisis of 2008 was just over the horizon. The global recession and austerity programmes that followed soon heralded a challenging decade locally, nationally and internationally. Uncertainty was multiplied after the result of the UK's EU Referendum vote in 2016.

## The Last Decade

The societal impacts of the financial crisis were profound and widespread, especially from 2010 onwards. However, the city of Edinburgh weathered the downturn well compared to many others at home and abroad, with the festivals making a strong contribution. They reshaped their operations in the face of 30% real terms grant reductions and became increasingly effective at raising donor and ticket income building on the foundation of core grant that is vital to so many of the festivals. These measures enabled festivals to protect funding to support artists, performers, technicians and the wider economy at the maximum possible levels – but led to increasing stretch as expectations of the festivals from multiple stakeholders increased.

The facts and figures on page 9 show how key impacts of the world's Festival City had developed in the last decade, making Edinburgh's Festivals even more central to Scotland's vibrancy, culture, economy and place in the world. As well as welcoming 40% of their audiences from beyond Scotland, Edinburgh's major international festivals also grew to attract a record two-thirds of city residents and work with 90% of schools, their widest local reach on record. Festival programmes were supported as never before by Scottish Government to invest in Scottish talent, and to connect them with their global peers from on average 80 countries each year. This made the festivals one of Scotland's truly global assets, their world-class appeal supporting over 6,000 additional jobs annually across the country.

As the decade drew to a close, the pace of growth and globalisation had increasing effects on the city and its festivals. At the same time as recognising and protecting the benefits of the capital's world leading status, it became critical to deal with real concerns about living standards and sustainability in a fast-growing historic city. Rapid population growth, increasing visitor numbers and more affordable travel, and the sharp growth in short-term lets all year round, were leading to high peak concentrations of people and pressures on parts of the city's infrastructure. Debates became polarised about how to manage the development of this cluster of events, now on the scale of a FIFA World Cup, and second only to the Olympic Games.

More widely, national and international movements were gathering momentum to campaign for urgent change in areas of equalities, wellbeing and sustainability such as #MeToo, Black Lives Matter, and School Strikes for Climate.



## Covid-19

As 2020 dawned, city partners were working together to consider how to address the complex challenges shared by successful cultural capitals, when a new and widely unforeseen threat emerged at alarming speed – the global pandemic that was shutting down societies across the planet, and laying bare many underlying issues.

For the first time in over 70 years, there would be no Edinburgh Festivals as the world had known them. The city fell silent, the livelihoods of creatives and service businesses sustained grave damage, and the festivals faced existential challenges that were only averted through much welcomed support and emergency funding from governments at all levels. Edinburgh city centre footfall fell by up to 90%. Live cultural events were severely restricted throughout 2020 and the festivals had to adapt rapidly to find innovative ways to present work, to engage creatives and protect livelihoods, to support wider supply chains, and to sustain global connections.

In 2021, with social distancing for audiences not lifted until 9 August, it was only possible to make a carefully managed restart of live performances at 10% of pre-pandemic levels. For a second financial year, grant support was provided to the festivals through local and national government schemes to mitigate the long-term damage being caused by extended restrictions, and to assist innovation and adaptation. The broader picture, however, was that the creative and leisure sectors were the hardest hit across the whole economy – with Scotland's GDP in arts, culture and recreation services falling nearly 18% between February 2020 and November 2021. The scarring of Covid disruption has left serious long-term impacts that will take years to stabilise.

In 2022, as some level of normality returns and new challenges emerge, it is clear that the world will never be the same again – and that the pandemic has accelerated processes of long-term change that need to be considered as we re-imagine our Festival City.



# 2

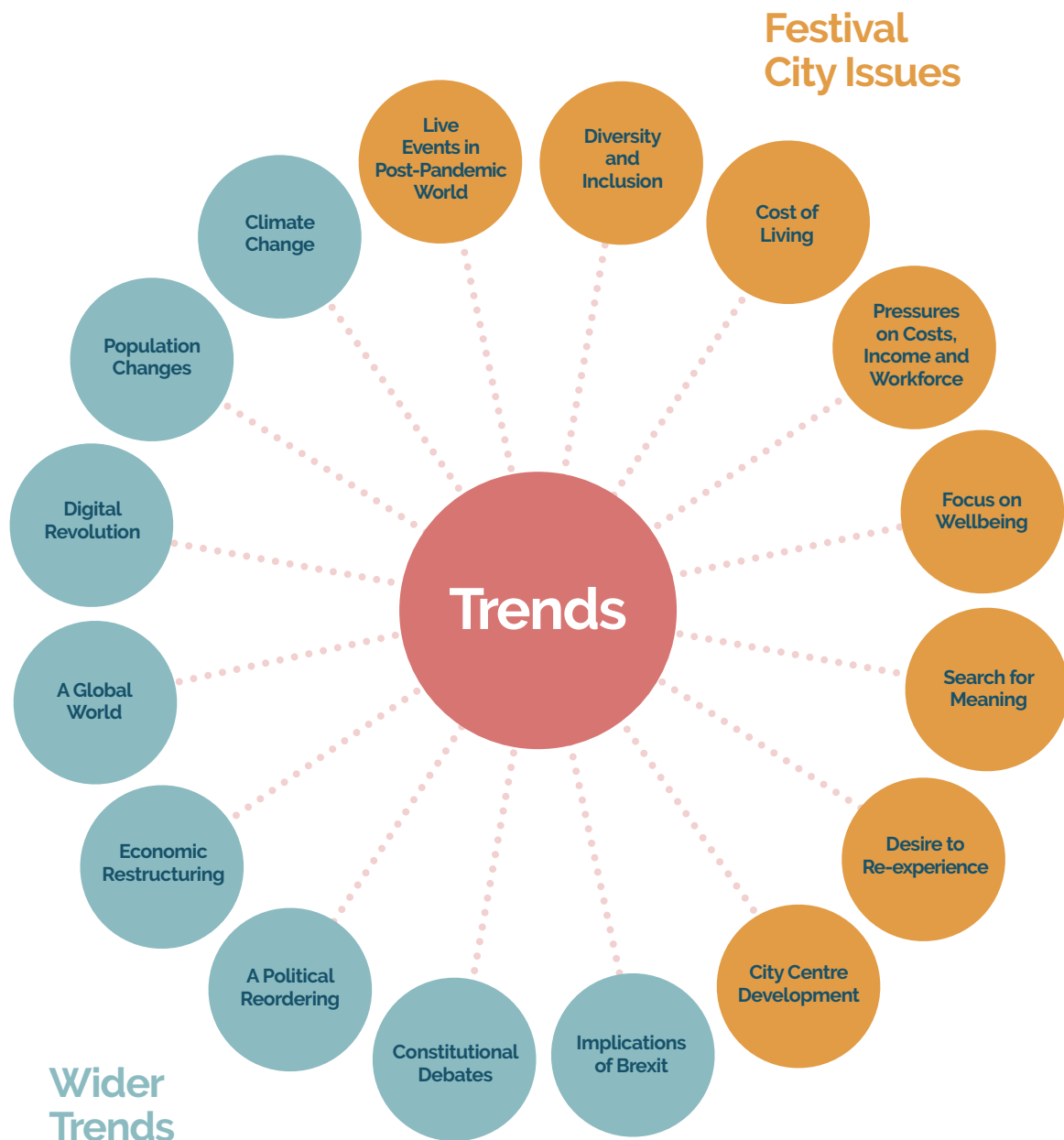
## DEVELOPING THE VISION



The pandemic struck just as the Edinburgh Festivals Forum were undertaking a mid-term review of their previous strategy *Thundering Hooves 2.0* and developing a future vision shared with the festivals. This process was rooted in the festivals' core purposes, the common ground with public policy, and global shared values such as the United Nations Sustainable Development Goals. The initial vision became an invaluable touchstone, and was updated based on internal research and external discussions to propose principles for how the festivals and the Festival City could rebuild and support wider renewal in a changed era.

## Recovery and Renewal Context

The festivals, and the Festival City, are re-emerging into a different, and increasingly complex, world. Crucial to setting a new vision for the coming decade is an understanding of key issues in this new landscape, and the trends within it which will have an impact on future operations. The graphic below identifies several trends that we think are most important to consider in planning our future festivals world – with further detail on each of the trends provided in Annex B to this report.



## Local, National and International Perspectives

Following a live event hosted by the Festivals Forum during the 2021 Edinburgh International Book Festival, a series of collective conversations began to gather feedback from local residents through Community Councils, from artists and creatives through Creative Edinburgh, and from businesses through Edinburgh Chamber of Commerce. This was part of a wider period of reflection and rethinking at local, national and international levels, which we participated in and learned from.

From these city conversations<sup>10</sup>, we know that:

- > cultural workers – who have seen worse Covid losses than any other sector – want to see more diverse, accessible, sustainable, and fair festivals as part of national rebuilding of the creative economy;
- > community representatives have highlighted environmental protection of the city centre and the over-commercialisation of public spaces as key concerns, and that they would like festival offers distributed more widely across the city; and
- > businesses, universities and colleges have stressed the need for Edinburgh to re-establish itself as a world city, for the exchange of ideas and talent, and to enhance regional prosperity.

Sitting alongside these desires for the future, it is clear that demand from audiences – representing the majority of festivals' income – will be the most critical factor in a sustained recovery. Festivals' audience research shows that there is a strong loyalty and compressed demand to experience the thrill of extraordinary, in-person live arts and culture again, as a counterbalance to ever-more digitised and localised lifestyles. However, in the short term this is set against 20% of audiences surveyed by Creative Scotland and the UK-wide Audience Agency – mainly in older age groups – being more anxious about returning due to Covid, and the current cost of living crisis putting pressure on discretionary expenditure.

Remaking relations with international supporters is also vital to a successful renewal, as they bring their brightest talent and inward investment to make Edinburgh a truly worldwide gathering. Scotland's cultural riches are many, but our reputation as a creative nation around the world is often first sparked by an awareness of Edinburgh as a world leading Festival City – as evidenced in a forthcoming report from the British Council, where international decision makers identified Edinburgh's Festivals as among the most significant of Scotland's cultural assets.

## Core Purposes and Shared Vision

Like others working to rebuild for a better society, Edinburgh's Festivals need to adapt and renew while holding onto fundamental purposes. Over the past two disrupted years the festivals have reflected deeply on what is the unique value that they can bring. Their answer is that they exist **to connect people, inspire creative ideas, and bring places alive in concentrated moments of communal celebration – focused on combining the local, the global and the live.**

Bringing the festivals' purposes together with those of the Festivals Forum stakeholders has enabled the development of the shared vision and ambitions.

The result of our collective internal research and external discussion is our agreed 2030 Vision, shown on the following page, to be **a world leading sustainable festival city**, with six ambitions to protect and develop our position encompassing shared values of being **globally minded, locally rooted, and creatively led.**

The following graphic summarises the 2030 Vision. The ambitions in orange will be led by the festivals, and the ambitions in purple will require policy collaborations.

<sup>10</sup> A summary of feedback can be found at [www.edinburghfestivalcity.com/about/documents/1424-2030-festival-city-vision](http://www.edinburghfestivalcity.com/about/documents/1424-2030-festival-city-vision)



The accountability of festivals remains to their boards, funders and regulators. This governance system will be reinforced by the 2030 Vision, and the aligned ambitions and actions set out here. Together they provide a complementary framework for integrated approaches to help regrow Edinburgh's international festivals cluster, and help identify where future collaborative actions can best be focused including in areas of common ground with public policy.

Each of the eleven festivals has their own core purposes, contributions, drivers and needs. This individuality is to be cherished as it is what makes Edinburgh's Festival City unique.

Supporting the festivals to develop these distinctive roles within the 2030 Vision, and building on their strengths as a portfolio, can optimise the resilience of the Festival City and the immense value brought to the people of Edinburgh, Scotland and the world.

The next section expands on the range of contributions across different festivals and Festival City stakeholders working towards these six 2030 ambitions. Given the uncertainties of the 2022 environment, and the difficulties of long-term forecasting, every ambition concludes with two key actions that each set of actors will prioritise now.

# 3

## SHARED AMBITIONS



# Global Solidarity

Edinburgh's Festivals are proudly and fiercely internationalist: it was a defining value of the festivals' foundations in 1947, which sought to establish Scotland as a cultural hub for global understanding, connecting people and ideas through shared creative experiences.

This internationalist spirit now needs to be reimagined in the context of the UK being outside the European Union. It will be vital to see festivals, national agencies and governments at all levels working together to push for the best possible conditions for the free exchange of people and ideas across borders.

The seismic shifts of Brexit and Covid-19 have also brought into sharp focus the importance of restarting pipelines of cultural export and inward investment for national recovery and renewal. Creative industries, major events and tourism have been identified as key opportunities at local, regional, Scottish and UK levels to contribute to a thriving economy. It is imperative for the festivals to regenerate to a scale of global ambition that will enable Edinburgh to reassert its position as a world leading sustainable festival city. Hosting artists, crew, producers and programmers gathers a pool of skilled talent and investment from home and abroad, creating the global marketplace that allows Scottish and UK talent to find their livelihoods.

The festivals play a crucial role in fulfilling Edinburgh's commitment to being a welcoming, international city. The city also makes a special contribution as Scotland's capital, which needs to be nurtured so that it can continue to be a global powerhouse in supporting regional and national prosperity, at the same time as increasing opportunities for local people to enjoy its success.

As worldwide conflicts and tensions deepen, our festivals will create opportunities for building understanding, connection and debate between people. Different festivals will uncover stories

that need to be told from home and abroad; raise awareness of humanitarian issues; champion freedom of expression; and connect global issues with the diversity of local communities.

In the short term, a key priority will be to protect and rebuild global content after two years when the hosting of international festivals in person has been a near impossibility. In doing so, the different festivals will pilot a range of models for international exchange, in the wider context of environmental concerns.

For the longer term, the festivals are determined to champion ideas for a more progressive new era in the shocking context of war in Europe and a geopolitical landscape sometimes ominously compared to the 1930s. Further development of the festivals' links with leading academics can strengthen the power of culture to generate new insights about ourselves, each other, and our intertwined past and future.

For global decision-makers, Edinburgh could provide thinking spaces that shed a different light on the world we live in and the great shared questions of our age. A latter-day Creative Enlightenment, spotlighting artists and thinkers, could aid the much needed transition to a more sustainable and peaceful future.

And among wider audiences, there is a panoply of stories about how a lifelong affinity with Scotland's culture and values can start with a visit to Edinburgh's Festivals for people who then choose to study, work, do business or live here. Scotland's national strategy of responsible tourism for a sustainable future will involve Edinburgh's magnetic pull being used to encourage curious and loyal visitors who stay longer and explore further, helping to optimise the capital's role as a gateway for the region and country.

## ACTIONS

- > Edinburgh's Festivals will champion 21st century enlightenment, with Scotland as a global cultural hub for thinkers and creatives
- > Edinburgh's Festival City stakeholders will support festivals' international missions, reach and relevance, demonstrating Scotland as a creative, open and progressive nation

# Valuable Skills and Work

For the re-emerging Edinburgh Festivals, the quality, range and innovation of each festival's programme remains at the heart of their ability to support creative careers; secure industry and partner interest; create opportunities; and attract audiences in their millions. Although our festivals have grown to be among the country's strongest cultural entrepreneurs – generating 85% earned income from 15% public grants – core public funding remains essential to business models to take risks on new work, uncover hidden themes, and support participants whose voices would not otherwise be heard.

The festivals rely on, and help nurture, Scotland's wealth of cultural talent, connecting them with international peers and ideas. Many programmes spotlight Scottish creatives on a global stage, supporting their livelihoods and development. At the world's leading performing arts gathering in 2019, nearly 1000 or 25% of Fringe shows were from Scotland, though we have less than 0.001% of the global population; and together the festivals supported over 6,000 full-time equivalent jobs in the wider Scottish economy. For the festivals not in receipt of core grant funding, including the Fringe, it will be important to consider the case for increased support where there is a drive to deliver more long-term public value.

The UK music, performing and visual arts sectors lost 30% of total jobs in 2020, with young people worst affected, and many have not returned. It is imperative that opportunities for Edinburgh's artists and workers are rebuilt, along with Scotland-wide pathways for creation, production and participation, and the pool of technicians and specialists in the events supply chain. This creates both a need and an opportunity for investment to work with schools and colleges to help more young people from every social background into the labour market. Online resources could also increase the transparency of, and accessibility to, information about the festivals' opportunities.

Beyond direct employment in the culture and events sectors, the festivals play a critical role in supporting many thousands of jobs for wider service businesses and local traders. Edinburgh has a 24% higher employment share in accommodation and food services than most UK cities. This sector together with arts, entertainment, recreation and other services account for 44,000 jobs between them. These are sectors of major importance for the city along with finance and insurance, and the education sector, which each employ 33,000 people. In order to rebuild prosperity, the growth of more extensive local supply chains, labour markets and investment flows are cornerstones of public policy – and many festivals are already reviewing procurement policies to bring increased benefits to city, regional and national suppliers.

Increasing equality of opportunity, diversity, and inclusion in working conditions will also be prioritised. A joint approach by funders to reviewing the framework of current policies could ensure that all such policy priorities are fully embedded in wider contractual agreements. Already, all of the Festivals Edinburgh members pay at least the Real Living Wage, and have a code of practice on volunteering developed with Volunteer Edinburgh. The most complex model is the open access platform of the Fringe, which is proud to lead with its vision 'to give anyone a stage and everyone a seat'. The new Fringe vision and values published in June 2022 outline core values for Fringe makers to subscribe to, with clear goals and pledges against key areas, including thriving artists, fair work, good citizenship, climate action, an equitable Fringe and digital evolution. This includes the aim for 95% of all paid employees at Fringe venues to be paid the Real Living Wage by 2027.

At a wider level, the nationwide event sector networks that developed during the pandemic could open up opportunities in the area of skills development through schools and further education partnerships. Edinburgh already has a retail and hospitality academy, and there may be latent demand for a sector skills initiative in sustainable live events, which could be taken forward at city region scale where the shared economic development framework has already identified creative, digital and tech industries as specific strengths.

## ACTIONS

- > Edinburgh's Festivals will rebuild and maximise access to the skills, employment and development opportunities the festivals create
- > Edinburgh's Festival City stakeholders will sustain the maximum possible long-term funding for festivals' core programmes, to secure the public value of the work they generate

# Connected Local Communities

Prior to the pandemic, Edinburgh's Festivals had developed extensive links with more than 130 community groups and over 90% of schools in the city. However, a pattern of short-term grants and fundraising made it difficult to sustain continuous relationships. The situation was improved when community engagement, along with programme innovation and creative development, was made one of three priorities for the 5-year Platforms for Creative Excellence programme (PlaCE) – a partnership investment between the City of Edinburgh Council, Scottish Government, and the festivals themselves.

This programme provided a long-term model for festivals' community engagement and creative learning ambitions for the first time.

Early results in 2019 were impressive – in the first 15 months, collaborative projects tripled, while festivals engaged over 3,000 Scottish artists and freelancers in professional development. When the Covid-19 pandemic took hold, the original scale of plans could not be realised: but despite this, the effect on those festivals who were supported to expand their work in local communities was transformative. As the programme comes to an end in 2023, festivals are working to secure future resources from across their funders and supporters to continue this work at scale. Whatever the volume of activity, the skills, values and working practices of those festivals have evolved for the long term.

At the same time, the festivals are very conscious that they rely on strong specialist community infrastructure to develop high quality targeted engagement. With non-statutory local authority budgets hard hit over the past decade, cultural capacity has been substantially affected in local venues and community centres, grassroots arts, and libraries.

The commitment from the festivals to deepen their local partnerships is widespread but has been made in the knowledge that they are not community arts organisations and need to balance such contributions while fulfilling a range of other roles. Sustainable resourcing of wider cultural and social services is

needed for a thriving community-based capability, if the ambitions for festivals to grow deeper community links are also to flourish.

The priority for the festivals post-pandemic will be to create deeper and longer-term relationships with local community partners, with an equitable recognition of each organisation's expertise, costs and contributions. Much has been learnt during Covid about the value of small-scale focused personal interventions. Those festivals best suited to expanding opportunities for community creativity and wellbeing want to see these lessons widely recognised, with quality and depth of engagement prioritised over volume. These targeted approaches will sit alongside continuing action by festivals to increase accessibility for all audiences.

Working with schools under pandemic restrictions has also been challenging but has offered new insights into how to support teachers and provide different formats to enrich activities. Festivals will take this experience into future programmes aimed at deepening creative learning opportunities for young people – both through planning with curriculum areas in mind such as expressive arts, health and wellbeing, and literacy; and through designing experiences that help develop personal achievements and skills for learning, life and the world of work.

Collectively, the festivals will nurture relationships with third sector partners who can help develop new collaborative models for community-led cultural planning; and will seek new investment to empower local people's choices to express their voices, celebrate their communities and share new experiences and ideas.

Digital accessibility has also emerged as a key opportunity to reach more isolated people in their local settings – whether in Edinburgh, countryside or around the world. While digital programmes will never be the primary focus, several of the festivals will continue to innovate and reach out through digitally augmented offers to new audiences from home and abroad.

## ACTIONS

- > Edinburgh's Festivals will deepen equitable community partnerships and connect local with global ideas
- > Edinburgh's Festival City stakeholders will explore ways to strengthen wider year-round community and cultural capacity

# Vibrant, Sustainable Gathering Places

Edinburgh's citizens value their festivals for the communal joy they bring; the pride they create in our city's quality of life; and the livelihoods they support locally, regionally and nationally. All of this relies upon the quality and range of creative live experiences the festivals can offer, catering for a myriad of tastes.

Thanks to the festivals, Edinburgh is well placed to adapt to the changing nature of city centres by providing responsibly managed experiences that generate value through human creativity. For audiences, they can serve the growing appetite for prioritising meaningful encounters as part of more sustainable lifestyles. And for the UK creative industries, they are a fixture in the annual calendar as a global testing ground and nexus of talent that increasingly reflects the interplay between live and screen arts, and between online and immersive design. Securing investment for works of excellence, innovation and risk as the festivals return will feed this pipeline of ideas exchange and talent attraction.

Local communities, businesses and creatives would also like to see more festival experiences widely distributed across the city – sometimes with local participation in mind and sometimes to drive new visitors. This is matched by a desire among many festivals to ensure that each year, some performances are staged in different neighbourhoods, guided by local audience demand. Scope for expansion is often dependent on confidence that wider audiences will attend on a scale that will make such shows financially viable, driven by factors such as city transport infrastructure.

The city centre will always remain popular in August during peak holiday season – and festivals, the City Council and other partners are committed to working together to improve city management. Pre-pandemic footfall of 2.7 million, split about equally between festivals and wider city attractions, dropped to 0.7 million during 2020 restrictions. As numbers rise from this low point, management of people flows and public safety will draw on the adaptations and innovations of the past two seasons.

At the same time, Edinburgh must still respond to the wider pressures on public services, housing and affordability driven by factors underlying the city's overall growth in the past decade – including population increases, visitor numbers, and our thriving tech, finance and education sectors, as well as the attractiveness of the city's built and cultural heritage. These growth pressures impact all who live and work here, especially those on lower incomes and many of the creatives who rely on freelance livelihoods. The city's development plans are geared towards taking action to promote fairness and tackle inequality, to build affordable and sustainable homes and to create safe and welcoming communities.

In this context, supporting the Festival City to develop successfully will require integrated multi-year planning from local and national authorities across infrastructure, regulation and regeneration. Key stakeholders will come together to examine how the framework for such integrated planning could be strengthened for long-term benefits.

Sustaining the attractiveness of Edinburgh's cultural quality of life requires infrastructure plans backed by many levels of public and private support – developing facilities for future generations; upgrading the public realm for accessibility and sustainability; creating state-of-the-art connectivity for digitally enhanced live events; and supporting year-round and community cultural hubs.

Beyond the central area, investment through development and regeneration initiatives could help to test new citywide offers – in the knowledge that post-pandemic, many artists and festival organisers cannot afford the risk of exploring these opportunities alone. The coming years offer scope for funders and festivals to work together to secure resources so that festivals can support the establishment of new, more widely distributed cultural and creative economy hubs – and so that local authority development plans can take account of the vital contribution of creatives to a thriving city.

## ACTIONS

- > Edinburgh's Festivals will work to sustain our capital's world leadership in unique creative live experiences
- > Edinburgh's Festival City stakeholders will examine how integrated multi-year planning can be strengthened across local and national levels to secure long-term benefits



# Net Zero Carbon Future

This decade is a critical one for humanity's impact on the climate. Edinburgh's Festivals recognise that in order to flourish, they need to find innovative, sustainable ways of operating and fulfilling the function of festivals in a net zero carbon future. This is driven not just by ethical responsibilities and business drivers; but crucially by the desire of the creative community to engage with the great concerns our era and have a wider influence on society.

The Scottish Government's Climate Change Plan recognises the importance of boosting public and private investment in delivering the transition to net zero. By 2032 the national target is for at least 50% of heat, transport and electricity demand to be met from renewable sources – and Edinburgh will need to take full advantage of available investment to meet the capital city's even more stretching targets. UK Government action, in parallel to the decisions of the Scottish Government, is also essential if Scotland is to meet its targets.

The City of Edinburgh's plans to transform the city centre, transport and travel networks to meet carbon reduction goals – and to protect the natural and built environments – will influence policies on the use of public spaces. Key civic spaces in the public realm will require more resilient infrastructure and clean power, so that events can continue to animate our cultural capital for the benefit of residents and visitors.

For the wider purposes of responsible tourism, it will be vital to understand how national ambitions translate into priority visitor segments and markets. This will encourage everyone involved in the visitor economy to take action in line with Scotland's long-term plans to deliver a green recovery, and play an integral part in the global solution. It will be important to look closely at how Scotland maximises our appeal to

audiences who have options for lower-carbon travel, as well as taking forward national efforts to optimise strategic air connectivity for our island nation and use it as efficiently as possible.

The Festivals are committed to take action and have created a shared carbon reduction route map in addition to individual environmental strategies. This identifies the areas of operations and wider systems that need to change, to reduce emissions in line with Edinburgh's goal to be a net zero carbon city by 2030. The starting point is rigorous management of internal aspects of operations under their direct control including production activities, procurement, and travel by staff and programmed artists. All festivals in receipt of core grants will report their emissions to funders annually, with many already obtaining an independent assessment of their baseline emissions and engaging with advisers to verify their planned carbon reduction measures.

The forthcoming festival seasons will show progressive implementation across all commitments, including expanding new ways to sustain future cultural exchange without such intense global mobility – such as international residencies and digital industry programmes. Festivals are also committed to influencing the attitudes and behaviours of artists and audiences beyond the city, although this is not formally included in the city's carbon footprint.

Many of the carbon reductions required mean engaging in areas beyond festivals' control to seek to accelerate necessary changes, whether with landlords and venues, or with wider policy and industry bodies. Particular key areas of focus will include the refitting of historic city venues to modern standards, and the planning of new cultural infrastructure aligned with sustainability targets.

## ACTIONS

- Edinburgh's Festivals will plan and implement actions to reduce festivals' direct emissions in line with city 2030 net zero targets
- Edinburgh's Festival City stakeholders will work towards decarbonisation of cultural infrastructure, power and transport systems

# Increased Resilience, Partnership and Investment

The Covid-19 crisis brought into stark relief the fragilities of the entire culture sector, especially its long-term financial sustainability and ability to invest in change. Pre-pandemic, the sector had already seen a difficult decade since the 2008 global financial crisis with the festivals seeing a 30% real terms reduction in public grants which they had balanced by diversifying their income streams. Government finances at all levels now face even greater challenges, so it is a priority to identify new investment models that can support maximum resilience and public value.

Learning from existing recent approaches should be built upon – such as the Covid-19 adaptation funding in 2021 and 2022 which enabled selected festival organisers to offer more support for artists to restart the production of live work. New sustainable income streams will be needed to support wider city and community collaborations. Exploring the case for reinstating Transient Visitor Levy legislation in the legislative programme of the Scottish Government would support this, as well as Scottish Government exploration of the policy to create a Percentage for the Arts funding scheme.

Supporting the enterprising creativity of individual artists and organisers through the festivals' platforms is an important part of rebuilding livelihoods, but Edinburgh must avoid over-commercialisation which could affect its world-class quality of life. It remains crucial to reinvest in the management and quality of the city environment, and support a balance between income-generating and subsidised activities.

Building on the festivals' proven strength in attracting match funding, businesses also have a key role to play in supporting the live events, culture and tourism sectors they benefit from. Examples of Edinburgh's leading private sector supporters of culture can be used to seek to inspire other corporates, and to encourage businesses to back environmental, social and governance shifts for a more sustainable and equitable city.

The Scottish Government Resource Spending Review to 2026–27 shows a challenging picture with projected real terms reductions in culture and major events spending. Funders will need to make difficult choices about spending priorities within competitive public funding processes. An opportunity to secure greater grant effectiveness in a constrained environment would be to put schemes such as the Festivals Expo Fund on a long-term footing. Momentum for change could also be sustained by the festivals and funders working together to create a next generation framework for programmes such as Platforms for Creative Excellence (PLaCE), capitalising on current successful outcomes. Greater streamlining of metrics and reporting requirements across different public funders in areas of common interest will also help to direct maximum effort towards delivery, recognising that there will always be some differences in aims and outcomes between funders.

The festivals will make the case for these changes, and for investment into the whole cultural landscape, through continuing to prioritise the development of robust evidence for cultural, social, economic and environmental impacts; and through active membership of national sector groups looking at future policy models. Such networks will also be vital to build resilience and partnerships through exchanging knowledge and contacts nationally and internationally. The festivals are also committed to working together to develop collective programmes aligned with the key 2030 ambitions, that will support the next phase of Festival City transformation.

Alongside these sectoral discussions, specific partnerships and networks will need to evolve to support this next phase of development. Festivals and stakeholders will review and develop the collaborative infrastructure supporting this effort, and identify the opportunities for regular dialogue with diverse city communities of interest. This will help to ensure that the immediate work of re-establishing resilience from a fragile position is firmly founded within the wider 2030 Vision for a world leading sustainable festival city.

## ACTIONS

- Edinburgh's Festivals will create cross-sector partnerships to attract resources for renewal of festivals and cultural provision
- Edinburgh's Festival City stakeholders will identify new investment models and streamline shared public funding metrics and reporting to maximise efficient use of funds

# Annex A Endnotes

*These notes relate to the graphic on page 9, with many of the notes being a hyperlink to the online source of the relevant information*

- 1 [www.edinburghfestivalcity.com/about/documents/1106-overview-of-festival-numbers](http://www.edinburghfestivalcity.com/about/documents/1106-overview-of-festival-numbers)
- 2 [www.edinburgh.gov.uk/say/edinburgh-people-survey/1](http://www.edinburgh.gov.uk/say/edinburgh-people-survey/1)
- 3 Festivals' Collective Impact Studies 2011 and 2016  
[www.edinburghfestivalcity.com/about/documents/156-research-reports](http://www.edinburghfestivalcity.com/about/documents/156-research-reports)
- 4 2016: 5,660 FTE jobs in Edinburgh and 6,021 FTE jobs in Scotland
- 5 The Network Effect report 2018  
[www.edinburghfestivalcity.com/about/documents/156-research-reports](http://www.edinburghfestivalcity.com/about/documents/156-research-reports)
- 6 Festivals Edinburgh 2019 internal data collection geo-mapped by University of Edinburgh  
[www.edinburghculturalmap.org/research/festivals-communities-map/](http://www.edinburghculturalmap.org/research/festivals-communities-map/)
- 7 Inspiring Creativity in Pupils report 2020  
[www.edinburghfestivalcity.com/about/documents/156-research-reports](http://www.edinburghfestivalcity.com/about/documents/156-research-reports)
- 8 Festivals' 2019 news releases and annual reviews
- 9 Festivals Edinburgh internal data collection

# Annex B Issues and Trends

Edinburgh's Festivals, and the Festival City, are re-emerging into a changed, and increasingly complex, world. Crucial to setting a new vision for the coming decade is an understanding of this new landscape, and the trends within it which will have an impact on future operations. The trends outlined below – which are related to the graphic on p15 – are those that we think are most important to consider in planning our future festivals world.

## Festival City Issues

### 1 Live Events in a Post-Pandemic World:

The Covid-19 pandemic accelerated already existing trends, like the rise of a cashless society, the increase in remote work, and the decline of bricks-and-mortar retail. Different behaviours are emerging between generations, with young people more willing to gather in communal situations. Many public health measures have become embedded in business practice and there is no guarantee that restrictions will remain lifted if a serious new variant emerges.

*For the festivals, the 'new normal' will make the running of events more complex particularly where there are older audiences.*

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**2 Diversity and Inclusion:** The pandemic exposed existing inequalities in societies and gave new impetus to many policymakers and businesses working to improve their diversity, equity, and inclusion efforts. Such developments are happening across many sectors, countries, and employers – and correspondingly job seekers and employees say they want to work in organisations that truly value diversity and inclusion as part of their culture, and audiences are looking for more inclusive, diverse, and accessible festival experiences.

*For the festivals, this opens opportunities to further demonstrate their values in their ethos and programming.*

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**3 Cost of Living:** UK households are facing the sharpest annual rise in the cost of living for many decades. Increasing bills and energy costs, and high inflation outstripping any wage or benefit increases, is resulting in a fall in 'real' disposable incomes. Such a fall is leading people to become more cautious about spend, and hesitant about making financial commitments, until the overall picture becomes clearer.

*For the festivals, this may influence the ticket buying behaviour of their audiences and the charitable giving of many of their individual donors.*

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### 4 Pressure on Costs, Income and Workforce:

Many economic analysts have stated that current cost rises in energy, materials and general supplies along with labour shortages represent a long-term trend that will affect the world for many years to come. This will affect capacity and operating costs directly and put pressure on income, as all parts of the economy have to adjust to a challenging new operating environment.

*For the festivals, a climate of increased production costs and skills shortages with reduced corporate and grant income would be a serious challenge.*

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**5 Focus on Wellbeing:** The pandemic has led many people to re-evaluate their place in society and their immediate wellbeing on a personal and a societal level. The benefits of connecting with people and finding joy in the present moment have taken on new significance.

*For the festivals, an increased focus on wellbeing provides an opportunity to identify the value of communal creative social occasions.*

- 6 Search for Meaning:** Aligned to the focus on wellbeing, the pandemic has led many people to redefine what is meaningful in their lives. After a crisis people often report a newfound sense of purpose, deeper relationships, a greater appreciation of life and other benefits.

*For the festivals, identifying the role of culture in helping contribute to a more meaningful life becomes a more important factor.*

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- 7 Desire to Re-experience:** The reality of lockdown, and the associated isolation from most forms of social interaction, has led many to place greater value on 'experiences'. Although there remain some anxieties about returning to events, in the longer term these sentiments are likely to be outweighed by the desire to live life to the full.

*For the festivals, this provides an opportunity to reposition their offers as essential unique human experiences.*

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- 8 City Centre Development:** At a local level, the next few years in Edinburgh will see extensive infrastructure development and efforts to promote public transport, space for pedestrians and active travel routes for walking, cycling and wheeling. These developments sit alongside ongoing debates about the use of public spaces and future of events in the public realm.

*For the festivals, such changes will impact on planning and delivery, including offering new opportunities through improved public realm infrastructure.*

## Wider Trends

- 9 Implications of Brexit:** The UK has left the EU, meaning huge changes to our legal framework, trade, labour markets, national security arrangements and constitution. This new order will resonate through political debate, society, identity, culture, and the economy over the coming years.

*For the festivals, this impact may be most immediately felt in stricter visa controls placed on visiting artists.*

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- 10 Constitutional Debates:** It is clear that there will continue to be debates over Scotland's constitutional future, including over the potential for a second referendum on Scottish independence. Wider constitutional debates across the whole of the UK will also remain live.

*For the festivals, this will create an opportunity to support open, thoughtful, and respectful debate, working with people and governments across the UK.*

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- 11 A Political Reordering:** Surveys show a marked decline of trust in institutions all over the world, and that changes the context in which civil society institutions operate. The political system that had held relatively stable since the Second World War is seemingly being reordered.

*For the festivals, this may provide an opportunity to position our cultural offering as a place of trusted debate in an increasingly fractured world.*

**12 Economic Restructuring:**

It appears that the trend towards small state, limited regulation and increasingly free market approaches has been fundamentally altered by the pandemic as state intervention became commonplace. There have been calls from academics, activists, and politicians across many nations for an equitable restructuring of the global and national economies.

*For the festivals, this may open up opportunities for public sector investment for programmes aligned to wider societal benefit.*

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**13 A Global World:** The global pandemic showed everyone how closely inter-connected the world is. Such a realisation has been intensified in recent months due to the war in Ukraine, and people are now seemingly more engaged with a new spirit of internationalism.

*For the festivals, this provides both a need and an opportunity to reassert their founding values and place themselves at the centre of building understanding across countries and continents.*

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**14 Digital Revolution:** The move towards a digital world accelerated during the pandemic. People have become much more comfortable with the presence of digital applications in their lives because they have seen them as a force for good. However, many on low incomes are disadvantaged by the 'digital divide', and there is growing concern about digital and data regulation. There are also open questions over environmental impacts and how digital can help achieve net zero goals.

*For the festivals, there is a need to understand how digital technologies can enhance their creative offer and audience reach without detracting from their core 'in real life' programmes.*

**15 Population Change:** Cities globally are projected to grow faster than the world population as a whole. The ageing of the baby-boomer generation in western economies is likely to continue to be a crucial dynamic, with important impacts on distribution of wealth and income. Among young adults, polling of Generation Z shows strong beliefs about the equitable, diverse, and sustainable nature of the society they want to live in and that many want to be 'activists' in helping bring that society about.

*For the festivals, there is an increasing need to be mindful of the significant changes taking place in audience motivations and behaviours.*

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**16 Climate Change:** Global leaders and experts surveyed by the World Economic Forum cited environmental issues as the biggest global risks in the short, medium, and long term. The urgency of this problem has increased in the last two years, both because the pandemic has stalled progress toward a green transition and countries have fallen short on existing climate change commitments.

*For the festivals, there is an increasing need to put in place mechanisms that continue to minimise their environmental impact and thus aid Scotland's progress towards a net zero society.*

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