

Edinburgh Festivals Impact Study

Final Report



Contents

Acknowledgements	1
1. Report Summary.....	2
2. Introduction	7
2.1 Background	7
2.2 Objectives.....	8
3. Methodology	9
3.1 Evaluation Framework.....	9
3.1.1 Scope of impact study.....	9
3.1.2 Stakeholder mapping	10
3.1.3 Existing data collection and previous studies	12
3.1.4 Logic model.....	12
3.1.5 Identification of outcomes	14
3.1.6 Development of indicators.....	15
3.2 Data collection	15
3.2.1 Festival-specific primary research.....	16
3.2.2 Management information	19
4. Core Festival outcomes.....	20
4.1 Cultural impact: Provide enriching, world class cultural experiences	22
4.1.1 Enjoyment, satisfaction and quality.....	22
4.1.2 Deepening and widening engagement with a cultural form	24
4.1.3 Distinctiveness and innovation.....	25
4.1.4 Widening access to high quality cultural experiences.....	26
4.1.5 Summary and conclusions.....	27
4.2 Learning impact: Provide engaging, informal learning experiences	28
4.2.1 Improving knowledge and engagement with the subject or cultural form	28
4.2.2 Improving personal development and 'non-cognitive' skills.....	31
Summary and conclusions.....	32
4.3 Cultural impact: Developing the creative, cultural and events industries in Edinburgh and Scotland	34
4.3.1 Professional development for participating artists/companies.....	34
4.3.2 Supporting Edinburgh's venue infrastructure	36
4.3.3 Supporting the Scottish culture sector in the wider world.....	36
4.3.4 Summary and conclusions	37
5. Wider Festival outcomes	38
5.1 Cultural impact: Develop audiences for culture	38
5.1.1 Summary and conclusions.....	39
5.2 Placemaking and media impact: Enhance the identity and image of Edinburgh and Scotland.....	40
5.2.1 Greater pride in the local area	40
5.2.2 Enhanced image of Edinburgh as a visitor destination	41
5.2.3 Promotes an outward looking, positive Scottish national identity to visitors.....	43
5.2.4 Generates (inter)national media profile.....	43
5.2.5 Summary and conclusions	46
5.3 Social impact: Support cultural diversity and community cohesion	47
5.3.1 Brings the local community together	48

5.3.2 Increasing opportunities to meet people from other backgrounds	48
5.3.3 Better understanding of own and other cultures.....	49
5.3.4 Increasing quality time together as a family	50
5.3.5 Summary and conclusions.....	51
5.4 Social impact: Contribute to well-being and quality of life	52
5.4.1 Summary and conclusions.....	53
5.5 Economic impact: Provide routes to employment and skills 54	
5.5.1 Personal development	54
5.5.2 Improved transferable skills.....	54
5.5.3 Widen social networks and contacts.....	57
5.5.4 Summary and conclusions.....	58
5.6 Economic impact: Support the wider economy in Edinburgh and Scotland	59
5.6.1 Overview	60
5.6.2 Audience numbers	60
5.6.3 Expenditure.....	62
5.6.4 Determinants of visitor expenditure	62
5.6.5 Festival organisers' expenditure	69
5.6.6 Multiplier effects	70
5.6.7 Overall economic impact of the Edinburgh Festivals	70
5.6.8 Summary and conclusions.....	73
5.7 Provide a marketing platform for sponsors and stakeholders.....	74
5.7.1 Summary and conclusions	76
5.8 Environmental impact: Resource depletion and climate change.....	77
5.8.1 Introduction.....	77
5.8.2 The specific challenge of the Festivals.....	77
5.8.3 Overall approach.....	77
5.8.4 The determinants of the Festivals' environmental impact..	78

5.8.5 Additionality	80
5.8.6 Capturing the base data: direct emissions and waste.....	80
5.8.7 Capturing the base data: indirect emissions and waste.....	81
5.8.8 Conversion to carbon.....	82
5.8.9 Summary and conclusions	84

6. Sustainability of the Festivals..... 85

6.1 Achieve a sustainable and diversified portfolio of funding sources	86
6.2 Innovate in product development.....	87
6.3 Actively engage with audiences and communities	87
6.4 Develop sustainable human resources	88
6.5 Use fair trade practice in procurement and supply chain management.....	89
6.6 Measure and reduce waste and energy consumption	89

7. Medium to long-term impacts.....91

8. Recommendations for repeating the impact assessment 93

8.1 Introduction	93
8.2 The evaluation process	93
8.3 Evaluation framework	93
8.4 Data capture tools	93
8.5 Survey scope and workplan	95
8.6 Data processing and analysis.....	96
8.7 Beyond the Edinburgh Festivals.....	96

9. Appendices 98

9.1 Festival descriptions.....	98
9.2 Meltwater News analysis search terms.....	102
9.3 Data description	103

Table of Figures

Figure 1: Festival activities included in the evaluation framework	9
Figure 2. Map of Festival stakeholders	10
Figure 3: Logic model of the Edinburgh Festivals Evaluation Framework	13
Figure 4: Overview of Festival-specific primary research	18
Figure 5. Number of survey responses, by Festival and visitor segment, to the Edinburgh Festivals, 2010	21
Figure 6. Audiences' enjoyment of Festival events (1=strongly disagree, 5=strongly agree), 2010	22
Figure 7. Audiences' ratings of quality of Festival events against other comparable events (1=much worse, 5=much better), 2010	23
Figure 8. Audiences' enthusiasm and interest in the cultural form/subject (1=strongly disagree, 5=strongly agree), 2010	24
Figure 9 Audiences' deepened engagement with the cultural form/subject (1=strongly disagree, 5=strongly agree), 2010	24
Figure 10. Audiences' rating of the uniqueness of Festival events against other comparable events (1=very similar, 5=totally unique), 2010	25
Figure 11. Children's and adult audiences' access to high quality cultural experiences (1=strongly disagree, 5=strongly agree), 2010	26
Figure 12 Audiences' learning outcomes (1=strongly disagree, 5=strongly agree), 2010	29
Figure 13. Learning outcomes for school children, assessed by teachers (1=strongly disagree, 5=strongly agree), 2010	30
Figure 14. Increased knowledge and understanding of audiences, volunteers and temporary staff (1=strongly disagree, 5=strongly agree), 2010	30
Figure 15 Increase in knowledge and understanding at Video Games Workshop of the Science Festival, pre and post workshop survey 2010	31
Figure 16 Science Festival Video Games workshop's effects on young people's non-cognitive skills, post workshop survey 2010	32
Figure 17. Performers'/delegates' professional development outcomes (1=strongly disagree, 5=strongly agree), 2010	34
Figure 18 Performers'/delegates' skills development and media profile outcomes (1=strongly disagree, 5=strongly agree), 2010	35
Figure 19 Gross visitor expenditure made at the Festival venues, by visitor segments, 2010	36
Figure 20. Festivals' impact on future attendance at cultural form (1=strongly disagree, 5=strongly agree), 2010	38
Figure 21. Local audiences' feeling of pride in the local area (1=strongly disagree, 5=strongly agree), 2010	40
Figure 22. Edinburgh's perception by audiences from outside Edinburgh and Scotland (1=strongly disagree, 5=strongly agree), 2010	41
Figure 23 Edinburgh's perception by delegates/performers and journalists (1=strongly disagree, 5=strongly agree), 2010	42
Figure 24. Audiences' perception of Edinburgh's and Scottish cultural identity (1=strongly disagree, 5=strongly agree), 2010	43
Figure 25. Number of news items for Edinburgh Festivals and comparator events, 2010	44
Figure 26. Meltwater News press monitoring 2010/11	45
Figure 27. Audiences' views on the Edinburgh Mela's role in promoting greater cultural understanding (1=strongly disagree, 5=strongly agree), 2010	50
Figure 28. Proportion of volunteers and temporary staff reporting increased skills in the different transferable skills areas, 2010	56
Figure 29. Skills development in non-cognitive skill areas by volunteers and temporary staff (scale: 1=Decreased greatly, 5=Increased greatly), 2010	56
Figure 30 Volunteers' and temporary staff's views on transferability of skills developed through engagement with the Festivals, 2010	57
Figure 31. Number of attendances and attendees to the Edinburgh Festivals, 2010	61
Figure 32 Average audience expenditure at the Edinburgh Festivals, per person per day, and average length of stay in Edinburgh and Scotland, 2010	63

Figure 33. Proportion of visitors to the Edinburgh Festivals, by place of origin, whose expenditure is additional to Edinburgh and Scotland, 2010	64	Figure 41. Framework for assessing the contribution of the Edinburgh Festivals to resource depletion and climate change, 2010	79
Figure 34. Gross and net visitor expenditure (audience, performers, delegates and journalists) at the Edinburgh Festivals, for Edinburgh and Scotland, 2010.....	66	Figure 42. Existing data on Festival offices, held by the Edinburgh Festivals, for calculating their environmental impact, 2010	80
Figure 35. Comparison of gross and net visitor expenditure to the Edinburgh Festivals (£m), by visitor segments, for Edinburgh, 2010	67	Figure 43. Existing data on outdoor Festival sites, held by the Edinburgh Festivals, for calculating their environmental impact, 2010	81
Figure 36. Breakdown of non-ticket net expenditure for Edinburgh, from audiences to the Edinburgh Festivals, 2010....	68	Figure 44. Means of transport to/from Edinburgh and average miles travelled, for additional visitors to the Edinburgh Festivals, 2010	81
Figure 37. Breakdown of net audience expenditure for Edinburgh (£m), by visitor type, at the Edinburgh Festivals, 2010.....	68	Figure 45. CO2e emissions generated by audiences', including travel to and from; and within Edinburgh, 2010	82
Figure 38. Proportion of staying visitors (audience members) from outside Scotland to the Edinburgh Festivals, 2010	69	Figure 46. CO2e emissions from the Edinburgh Festivals, 2010	83
Figure 39. Overall net economic impact of the Edinburgh Festivals, for Edinburgh, 2010.....	72	Figure 47. Evaluation process for the Edinburgh Festivals, with suggestions for refinements and alternatives for 2011	94
Figure 40. Festivals' benefits for corporate sponsors (1=Not very important, 5=Very important), 2010	75		

Acknowledgements

This report was written and prepared by Ulrike Chouguley, Richard Naylor and Cristina Rosemberg Montes at BOP. Philip Craig at GHK provided initial guidance and input on the development of the economic impact methodology. The research team would like to thank the Steering Group for their valuable input and support throughout the research:

- Margaret McNeil (Scottish Enterprise)
- Martin Reynolds (Festivals Edinburgh)
- Joanna Baker (Edinburgh International Festival)
- Joanne Deponio (EventScotland)
- Lynne Halfpenny (City of Edinburgh Council)
- Hilary Pearce (Scottish Government)

Thanks as well to Jonathan Sewell (Scottish Government) for his feedback and to Bruce MacDonald (SQW) for his clarifications on the economic impact methodology.

We would also like to thank Julie's Bicycle for their collaboration on the environmental impact calculations and the Festivals' market research partners for their research collaboration: The Audience Business (TAB), Scotinform and Progressive. We are particularly grateful to Amy Thomson from TAB for her collaboration and support all throughout the research period.

Finally, we would like to express our gratitude to the twelve Festivals that took part in the research. This work would not have been possible without their support and assistance and we appreciate the time and effort that they invested into the impact assessment.

1. Report Summary

BOP Consulting was commissioned to conduct an impact assessment of the twelve Festivals represented by Festivals Edinburgh. The Study was commissioned by the Festivals Forum and in partnership with Scottish Enterprise, Festivals Edinburgh, City of Edinburgh Council, EventScotland (also representing VisitScotland), The Scottish Government and Scottish Arts Council (now Creative Scotland).

It builds on the Edinburgh Festivals Economic Impact Study conducted by SQW in 2004/05, which assessed Edinburgh's Festivals in terms of their collective economic impact. It also responds to some of the issues identified in the *Thundering Hooves* report in 2006, which looked at the competitive global position of Edinburgh's Festivals.

While the assessment of economic impact remains a key concern of this study, there was a shared recognition among the Festivals and the commissioning stakeholders of the need for a more rounded assessment of the value of the Festivals. This study therefore set out to take a '360 degree' approach to assessing impact that considers social, cultural, environmental and media aspects, in addition to the economic effects. The research thus enables the Festivals to demonstrate their value to a much wider range of stakeholders across Scotland and beyond. A further key objective was to develop a repeatable method that is owned by the Festivals themselves, in the form of a new impact assessment framework and data collection process.

At the core of the impact assessment lies an ambitious and far-reaching programme of primary research. The scale and depth of the study exceeds all previous research projects carried out on behalf of the Festivals: more than 50 separate surveys were conducted across the twelve Festivals, involving in total more than 15,000 respondents. This did not only include audiences, but also sought to understand the impact that the Festivals have on a range of other groups and stakeholders (performers and delegates, attending journalists, volunteers, temporary staff, teachers and Festival sponsors).

The study shows that Edinburgh's Festivals together provide an incredibly rich and varied cultural offer. While audiences in the UK and internationally may initially associate Edinburgh with larger Festivals like the Edinburgh International Festival, the Edinburgh Festival Fringe, or Royal Edinburgh Military Tattoo, it is the diversity and quality of experiences offered throughout the year-round Festival season that makes Edinburgh truly distinctive. Our research confirms that the Festivals together have positive impacts that span an enormous range of cultural, social and economic areas. This year has also seen the Festivals taking a leadership role by taking the first collective steps towards measuring the impact that they have on the environment.

Cultural impact: provide enriching, unique, world class cultural experiences and develop audiences for culture

Providing enriching, world class cultural experiences lies at the heart of all the Festivals. A positive Festival experience is also a prerequisite for many of the wider social and economic outcomes that may arise (in the sense that a good Festival experience may shape visitors' views about the city itself in a positive way and make them more likely to return, garner more positive media attention, and so on).

The research finds that audiences are very satisfied with their experience of the Edinburgh Festivals. Indeed, they rate the events as better than other comparable events and activities. Audiences value the Festivals because they give them the opportunity to have an enjoyable social experience with friends and family, but also because they result in a number of specific cultural benefits.

- Audiences value world class and international cultural experiences – and the Festivals provide these.
- Through the Festivals, audiences are able to engage more deeply with the many art forms, including discovering new artists, new styles and new genres.
- Audiences consider the Festivals to be unique and distinctive – standing out from comparable events.

The study also shows that the Festivals have an impact on cultural participation more widely, in particular on audiences' year-round attendance. For instance, there is evidence that:

- The Festivals are a stimulus to further attendance at similar cultural events subsequently.
- Audiences are more likely to take their children to similar cultural events as a result of their Festival experience.
- Audiences are more likely to take greater risks in their cultural choices and explore new cultural experiences as a result of their Festival-going.

Cultural impact: develop the creative, cultural and events industries in Edinburgh and Scotland

Aside from events for the public, the Festivals also promote, develop and support the cultural, creative and events sector in Edinburgh, Scotland and beyond. Most obviously, the Festivals make an important economic contribution to the range of cultural venues that are involved in hosting the Festivals throughout the year. The Festivals also contribute to the professional development of performers and artists. Simply taking part in the Festivals increases artists' reputations and provides them with inspiration for new work as well as the prospect of follow-on sales and new commissions.

The Festivals are also proactive in supporting performers and companies. This includes directly spending a significant proportion of their budget on artists based in Scotland, and by providing tailored delegate programmes that increase practitioners' knowledge and skills, and widen and deepen their peer networks.

The Festivals help to build capacity for the sector long-term. Volunteers and temporary staff who are working with the Festivals are more intensely engaged than in, for instance, the Scottish museums sector (in terms of the average number of hours contributed per volunteer). This wealth of experience constitutes a resource for the sector when looking ahead towards other large scale events such as the Glasgow Commonwealth Games in 2014.

Learning impact

Audiences' increased enjoyment of the event – and of the cultural form or subject – translates into learning benefits for a large part of the audience. This learning includes a better understanding of the cultural form itself, and of wider environmental or social issues covered through the Festival activities. Some of the Festivals also provide activities for the formal education sector. Teachers perceive these as a value-added enrichment to the curriculum, rather than a major contributor to core subject learning.

In line with this, the Festivals have very positive effects on children's personal development, in particular their imagination and creativity. The Festivals do not have any major influence on pupils' attitudes to school learning and peer relationships. This is perhaps not surprising, considering that most Festivals' activities for the formal education sector during the Festival time only offer a very short engagement period. This is also true for audience engagement at Festival events more generally. However, many Festivals do offer education activities outside the Festival time and these offer greater scope for deeper engagement.

The brevity of the interaction is likely to be a key reason why the Festivals' impacts on increasing knowledge and learning, albeit positive, are perhaps not as high as expected (compared to other cultural sector research). Another explanatory factor may be that the Festivals' audiences are already sophisticated and knowledgeable cultural consumers, so the degree to which the Festivals are able to contribute to further improvements in their understanding or knowledge of the cultural form or subject matter itself, may be limited. Having said this, the Festivals do provide some forms of deeper engagement during the Festival period – for volunteers, temporary staff and some workshop participants – and these groups do indeed show strong learning impacts in the subject area and the cultural form.

Place-making and media impact: enhancing the identity and image of Edinburgh and Scotland

One of the most striking findings from the research is the strong and positive impact that the Festivals have on the way the City of Edinburgh

and Scotland are perceived, by locals and external visitors alike. While it might be expected that attendees have a positive attitude towards the Festivals, the results exceed what is known from research on other cultural and heritage activities (including where improving local pride and perceptions have been a major aim of the activities). Our results show that:

- Local residents take great pride in the Festivals and the value they provide to Edinburgh as a city.
- Visitors believe that the Festivals make the city distinctive; they highly value the experience of having multiple Festivals running simultaneously during the summer period, and are more likely to re-visit as a result of attending the Festivals (thus ensuring the continued contribution to Edinburgh's visitor economy).
- The image that the Festivals present of Edinburgh and Scotland is one of diversity and openness; showcasing a positive national identity.

The media attention that the Festivals generate (as recorded through the online monitoring service Meltwater News) is also very significant, and it exceeds that of other comparable events. The data recorded by the online news monitoring tool used in the study does not allow any conclusions to be drawn as to whether this media attention is positive or negative. However, the social media activity generated by the attending journalists has been assessed and it is largely favourable. This suggests that the ultimate media messages that are networked and syndicated from the attending journalists are predominantly favourable.

Social impact: cultural diversity and community cohesion

With the exception of the Edinburgh Mela, achieving social outcomes is not the primary aim of any of the Festivals. Nevertheless, our research shows that the Festivals do have a number of social impacts, in addition to promoting local pride and a sense of belonging. In this study, the Festivals' social impacts were interrogated based on the concept of social capital, which considers the formation of social networks, relationships and links to resources as a first step in achieving longer term socio-economic outcomes. From this perspective, there is evidence that the Festivals help to build social connections between

people – whether between family members, or between people from both similar and different communities. Providing opportunities for people to meet people from, and share messages about, different cultures – within the positive and informal context of a cultural event like the Edinburgh Mela – also helps people to increase their understanding of other cultures.

Social impact: contribute to well-being and quality of life

Participation in culture and leisure activities is thought to support all round well-being (in the sense of 'a positive physical, social and mental state') and 'happiness'. Although relatively mild, the Festival research was able to demonstrate a noticeable impact on people's all-round well-being, which is in line with other cultural and heritage events research.

In addition, the Festivals have a stronger well-being impact on particular groups. Firstly, they positively affect the overall emotional, mental and social well-being of children in their early development. Secondly, they have greater well-being impacts on more intensely engaged groups, such as temporary staff and volunteers. This includes positive impacts on both general well-being and specifically their feeling of self-worth. The latter is even stronger for the comparatively older volunteer pool – a finding that is entirely in line with other cultural and heritage research that suggests that the benefits of participation are greater for older people.

Economic impact: provide routes to employment & skills

Volunteers and temporary staff who were engaged in Edinburgh's Festivals have developed on a personal level through the experience. Indeed, compared to other volunteering research in the cultural heritage field, the findings around increased self-esteem and curiosity are particularly strong.

When looking at transferable skills, temporary staff are more likely to be motivated by professional skills enhancement, and to develop employability skills during the course of their involvement with the Festivals than volunteers. This is likely to be a factor of the profile of volunteers and temporary staff included in the sample. The age profile of volunteers is older than that of temporary staff, hence career aims and

development are of greater interest to the younger temporary staff cohort, and older volunteers already have a higher level of skills prior to their involvement (hence any further improvements are modest).

Our research shows that the Festivals contribute to volunteers and temporary staff further building their social capital: many of them become involved with the Festivals because of the opportunities that are offered to build new social networks. The research also confirms what is known from other cultural sector volunteering: many of the Festival volunteers have volunteered in the past and they are likely to volunteer again in the future, including in other areas of civic life. In contrast, temporary staff are less inclined to go on to volunteering, certainly outside the cultural sector.

Economic impact: support the wider economy in Edinburgh and Scotland

The study also confirms and further strengthens the key message from the earlier Edinburgh Festivals Economic Impact Study: the Festivals are a major contributor to both the local Edinburgh economy and the national Scottish economy. This economic impact spreads far beyond the immediate cultural economy. In fact, the biggest beneficiary businesses in Edinburgh and Scotland are those in the tourism, hospitality, and leisure sectors. The economic impact was assessed according to the principles of the Scottish Government and HM Treasury's *Green Book*, which means that only the economic contribution which is genuinely additional has been considered. The overall factors that generate the economic impact of the Festivals are not markedly different from the previous SQW study:

- The economic impact is driven by audience expenditure, but performers and delegates and attending journalists also make significant contributions in absolute terms.
- Audience expenditure is dominated by staying visitors, as they spend more, stay for longer, and their expenditure is more likely to be genuinely additional.
- The large proportion of the overall economic impact is generated by just a small number of the Festivals.

The main difference, then, is that the overall economic contribution of the Festivals has considerably increased since the last study, and this occurred despite the cohort of Festivals being smaller within this year's research than in 2004/5.

Provide a marketing platform for sponsors and stakeholders

The findings in this section suggest that brand association is the most important benefit that sponsors draw from the Festivals (however, not necessarily association with the *cultural* brand), in addition to reaching specific, local audiences. This means that sponsors mainly support the Festivals for 'what they are' (high quality, innovative, creative) and 'whom they attract' (local residents) rather than 'what they offer' (corporate hospitality, discounted tickets, etc.). This also means that Festivals compete not just with other cultural events and organisations, but also with other major events such as sporting events. Having a high-quality offer and being innovative thus stand out as key criteria for attracting sponsorship support – which re-iterates the *Thundering Hooves* report's emphasis on the importance of innovation and quality in maintaining the competitive advantage of Festivals.

Environmental impact: climate change and resource depletion

The final impact area considered as part of the research is the most challenging for the Festivals, as it consists of assessing the impacts on the environment. Attempting to tackle this issue is a laudable and brave undertaking. The Festivals have already shown leadership in their development of a cross-Festival Environment Strategy. The strategy aims to build awareness and capacity within the Festivals, as well as identify and develop approaches and practice (such as the Green Venue accreditation scheme) to tackle their environmental footprint. Nevertheless, the process of measuring the negative environmental contribution is still difficult and has inherent challenges for organisations' communication agendas.

The Festivals – and the cultural and tourism sectors more generally – are still at an early stage in terms of their thinking around

environmental sustainability. This year's research has therefore concentrated on ways of assessing and monitoring the current level of impact (rather than measuring a process of change, as in the other impact areas). It must be recognised that there are still significant gaps in the Festivals' data (including the impact of most Festival venues, performers and production crew) which means that the figures presented in the report are a considerable underestimate of the overall carbon footprint of the Festivals. From what is known to-date, audiences (and in particular staying visitors) account for the biggest proportion of the impact, but further work is needed in this area.

Sustainability of the Festivals

Ensuring that the Festivals can deliver the full range of outcomes and impacts as outlined above requires thinking about their processes from the viewpoint of sustainability. This means taking a broad look not just at environmental issues (as described above), but also at the economic and social sustainability of their operations.

There is substantial public sector investment in all the Festivals, whether directly as core funding or indirectly through infrastructure investments in venues. However, from a sustainability point of view, it is important to assess whether the Festivals have other sources of income. When looking across the twelve Festivals, figures suggest that they do have a sound financial base. This is certainly true for the proportion of earned income out of their total income, which is considerably higher than the average for the cultural sector. However, there are large differences across the Festivals, partly related to art forms. Another element in ensuring the continued economic success of the Festivals is their competitiveness and attractiveness within a global Festivals 'marketplace'. Innovation is a key factor to keeping Edinburgh's competitive edge and this year's study provides an initial benchmark of the significant financial investments that the Festivals make in the innovation of their programming.

Pursuing a social sustainability agenda – in particular through audience engagement in the Festival delivery and strategic direction – is widely recognised as a way of empowering people, a central tenet of the current UK coalition government's Big Society concept. Although not all

Festivals could report figures on such engagement, they provide evidence that audience members or community representatives were engaged in discussions about programming and their Festival experience. More formally, the Festivals clearly draw on locally based staff, but there is less evidence that the Festivals have a particularly diverse workforce.

Going forward

The Festivals will have wider effects than the short term impacts outlined in this report. While looking into these longer term impacts was beyond the scope of the current research, the areas below may provide valuable further insights for the Festivals and strengthen the case with funders and stakeholders. These include:

- Festival engagement of local residents, particularly 'non-users'
- Year-round cultural participation in Edinburgh
- Labour pool effects of the Festivals in Edinburgh

In order to ensure that the Festivals are able to repeat the methodology and impact assessment in future years, the study also makes a set of detailed recommendations relating to the evaluation process, the evaluation framework and the data capture tools. Key recommendations are to:

- Exclude from the economic impact assessment those smaller Festivals that attract a predominately local audience.
- Consider running some of the impact themes on alternate years.
- Extend media monitoring by making use of the new tools to track social media activity, and pursue cost-effective means for capturing broadcast content through partners and stakeholders.

2. Introduction

BOP Consulting was commissioned by the Festivals Forum¹ to conduct an impact assessment study for Edinburgh's Festivals. The study was managed by, and commissioned in partnership with:

- Festivals Edinburgh
- Scottish Enterprise
- City of Edinburgh Council
- EventScotland (also representing VisitScotland)
- The Scottish Government
- Scottish Arts Council (now Creative Scotland)

The research started in February 2010 and covered a full year of Edinburgh's Festival programme. In total, more than 15,000 Festival audience members and stakeholders were involved in the research. This report presents the aggregate findings of the impact assessment study for all Festivals.

2.1 Background

Edinburgh is internationally renowned for the annual Festival programme which it hosts. Starting with the Edinburgh International Festival in 1947, it has developed a year round sequence of Festivals which is crucial to the cultural, economic and social life of Edinburgh, of the wider city-region, and to a greater or lesser degree, of Scotland itself. The Edinburgh Festivals, for the purpose of this study, comprise the twelve Festivals represented by Festivals Edinburgh (see Appendix 9.1

for a detailed description of each of the Festivals). The Festivals are listed in date order below:

- Edinburgh International Science Festival
- Bank of Scotland Imagine Festival
- Edinburgh International Film Festival
- Edinburgh Jazz and Blues Festival.
- Edinburgh Art Festival
- Edinburgh Mela
- Royal Edinburgh Military Tattoo
- Edinburgh Festival Fringe
- Edinburgh International Festival
- Edinburgh International Book Festival
- Scottish International Storytelling Festival
- Edinburgh's Hogmanay

This impact study builds on the Edinburgh Festivals Economic Impact Study conducted by SQW in 2004/05, which assessed Edinburgh's Festivals in terms of their collective economic impact. The study estimated that the seventeen Festivals included in the study generated around £170 million of output per annum at the Edinburgh level and £184 million at the Scottish level. Since that time the Festivals have continued to grow and there have been some significant changes in the Festival 'landscape'. In particular, the *Thundering Hooves* report (2006) put in place the strategic framework for partnership action to ensure that the competitive edge of Edinburgh's Festivals was maintained.² In line with this, Festivals Edinburgh was created in 2007 by the directors of the city's twelve major Festivals to take the lead on their joint strategic development. More recent developments include the

¹ The Festivals Forum was established by the City of Edinburgh Council, Scottish Government, Scottish Arts Council/Scottish Screen, Event Scotland, Visit Scotland, Scottish Enterprise and Festivals Edinburgh in March 2007. It is a high-level, strategic commission bringing together representatives of those with a stake in maintaining the global competitive advantage of all Edinburgh's Festivals.

² AEA Consulting (2006) *Thundering Hooves: Maintaining the Global Competitive Edge of Edinburgh's Festivals*, report commissioned by Scottish Arts Council in partnership with Festivals Edinburgh, the City of Edinburgh Council, the Scottish Executive, EventScotland and Scottish Enterprise

establishment of the Scottish Government's Edinburgh Festivals Expo Fund in 2008, which made available £8m over four years to support the development of Scottish-based work at the twelve Festivals.

2.2 Objectives

The Edinburgh Festivals Economic Impact Study in 2004/05 also identified that Edinburgh's Festivals have an impact that goes beyond their economic effects. While the assessment of economic impact remains a key concern, there was a shared recognition among the Festivals and the stakeholders that it is important to present a more rounded argument about the value of the Festivals. In addition, calculating the 'net economic effect' according to Treasury *Green Book* principles (see section 5.6) has the unfortunate side effect of discarding most of the Festivals' visitors and instead places a large emphasis on the expenditure of paying staying visitors from outside of Edinburgh. This produces a lopsided, partial and thin account of the impact and value of the Festivals which, on its own, does not meet the needs of the Festivals or their funders.

Instead, this study set out to take a '360 degree' approach to assessing impact that considers social, cultural, environmental and media aspects, in addition to the economic effects – thus enabling the Festivals to demonstrate their wider value across Scotland. This approach of assessing the 'all-round' value of the Festivals is ground breaking and the first study of its kind – not just for the twelve Edinburgh Festivals, but more widely in the Festivals and events sector.

The twelve Festivals offer a great breadth and diversity in terms of the cultural experiences they offer and the audiences they reach (as well as in terms of size, scale and duration). This diversity is inevitably reflected in the types and scale of impacts that they generate. It is important not to try to iron-out these distinctions, but rather to use them to express an array of impacts across Edinburgh's Festival portfolio. Having said this, the Festivals were equally interested in capturing their 'cross-Festival impact' – the additional value generated through the multiple Festival offer and their mutual interdependency.

A key element from the outset of the study was to embed the evaluation processes within the Festivals. While all of them recognise the importance of individually and collectively demonstrating their impacts, many of them currently lack resources to develop effective tools and processes to achieve this aim.

The study therefore had two main objectives:

- To produce an **updated impact study** for 2010 that looks at economic, social, cultural, media and environmental impacts, and that allows comparison with an earlier impact study produced in 2004/05
- To develop a method of ongoing assessment that is owned by the Festivals themselves in the form of a **new impact assessment framework** and data collection process

In order to ensure that the evaluation framework and process is repeatable and self sustainable in future years, it needed to be understood and approved by all partners. Therefore, the study placed great emphasis on co-developing and designing the framework with the Steering Group and the Festivals.

3. Methodology

This impact assessment expands considerably on the original SQW economic impact study of 2004/05 and other recent research undertaken into the Festivals. It is much wider in scope, encompassing social, cultural, environmental, media, as well as economic, impacts. As a result it is based on much wider and more diverse sources of information and data. The consultants have worked closely with the Festival organisers and strategic stakeholders to build up this larger framework and to devise additional new tools for data collection.

3.1 Evaluation Framework

The evaluation framework was developed by:

- Reviewing existing data sets – to identify existing data collection currently undertaken by the Festivals and partner agencies and assess their suitability to provide the information required for the impact assessment
- Reviewing best practice in evaluation and performance management frameworks – to identify and review approaches and indicators from other existing frameworks
- Undertaking one-to-one consultation with Festivals and stakeholders

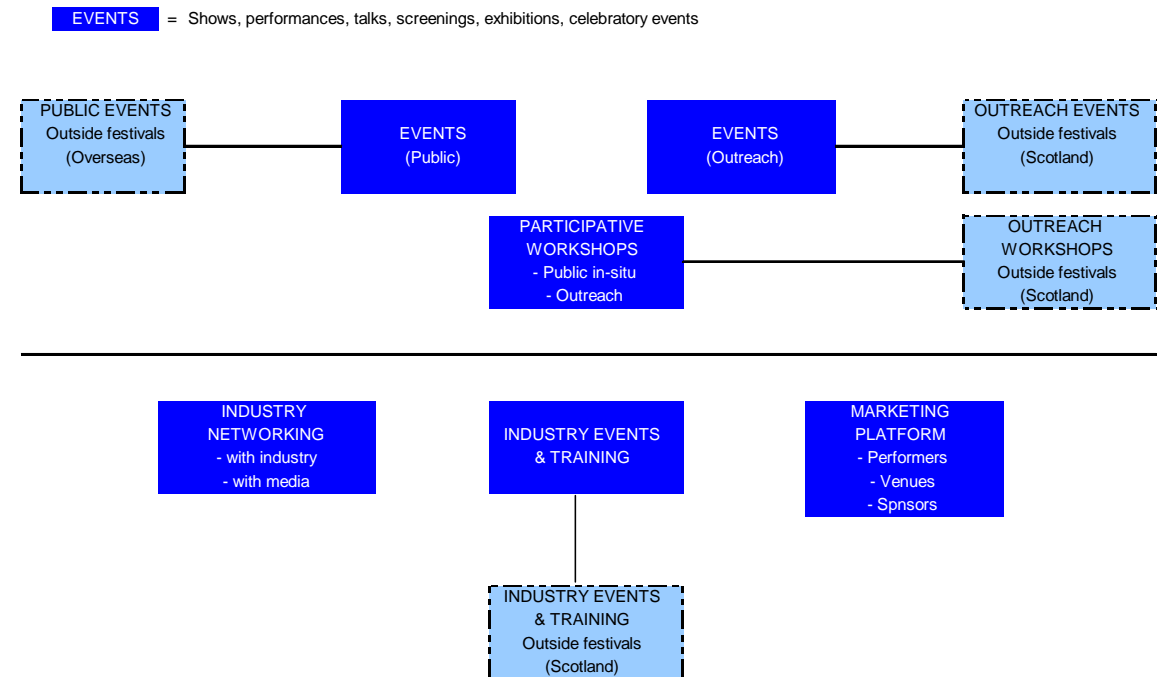
The prototype version of the framework was then tested in three half-day workshops with the Steering Group and the Festivals. Based on the feedback provided, a ‘beta’ framework was developed.

3.1.1 Scope of impact study

An important step in developing the framework was to gain an in-depth understanding of ‘what the Festivals do’. The Festivals cover a great range of activities, undertaken for different purposes and audiences. While all Festivals showcase activities aimed at the ‘general public’, several of them run specific events with an outreach focus for schools or community groups. In addition, a number of the Festivals provide a

targeted programme for industry professionals that includes networking, training or showcasing opportunities. Figure 1 gives an overview of the different activities offered by the Festivals.

Figure 1: Festival activities included in the evaluation framework



Source: BOP Consulting (2011)

Having established the core activities of the Festivals, the scope of the impact assessment study was defined in terms of three aspects:

- Organisational remit – in a number of cases the Festival is not the only activity run by the organisation. For example, the Scottish Storytelling Centre or Imagine run a year-round events, training and development programme, of which the Festival is only one part. In other cases like the Edinburgh International Festival or the Edinburgh Festival Fringe, the organisation runs a separate trading subsidiary

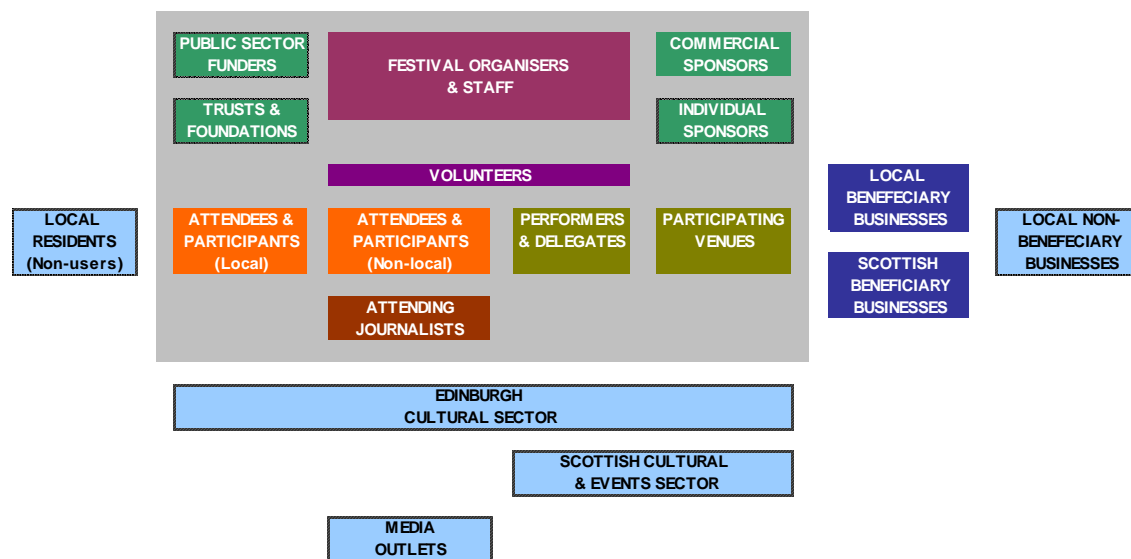
company. For the purpose of this study, only activities that directly relate to the Festival operations have been included in the research.

- Timing – most of the Festivals (whether they are run as part of a larger organisational structure or not), run some activity outside the immediate Festival period. For instance, the Edinburgh International Festival runs an education and outreach programme throughout the year that is directly linked to the Festival programme. Also, the Royal Edinburgh Military Tattoo staged a number of shows in Australia, and the Scottish Government Expo Fund enabled some of the Festivals to undertake a series of marketing and sector development activities that took place outside the Festival period. For the purpose of this study, only activities that took place during the Festival period were included in the research.
- Geography – a few of the Festivals programme events and activities that take place during the Festival period but outside of Edinburgh. For instance, the Scottish International Storytelling Festival runs several education and outreach events that take place across the rest of Scotland. For the purpose of this study, only activities that took place in Edinburgh itself were included in the research.

3.1.2 Stakeholder mapping

The next stage in understanding the impact of the Festivals was to think about ‘who the Festivals have an effect on’. This is important in order to know who to include in the research activities. These stakeholders can gain a direct benefit from the Festivals, or also act as ‘proxies’ for assessing the Festivals’ value.

Figure 2. Map of Festival stakeholders



Source: BOP Consulting (2011)

Core stakeholders

As shown in Figure 2, the Festivals have an impact on a considerable range of stakeholders, albeit with varying degree of intensity. At the centre of the stakeholder map are the Festival Organisers themselves and their core staff, who drive and shape the Festival’s activities. Closely related are temporary staff and volunteers who are key contributors to, and beneficiaries of, the Festival organisations.

All the Festivals have, in addition to public sector support, some level of private sector investment. While it is reasonable to suppose that the greater the level of public sector support (both in real terms and as a percentage of turnover), the higher the expectation of demonstrating impact, private sector donors are also interested in seeing the effects of their investment, even though the types of outcomes they are interested in will considerably vary (e.g. social outcomes vs. marketing/brand value).

As stated in most of the Festivals' aims and objectives, the main organisational purpose is to deliver activities to Festival audiences. But the types of impacts on these audiences will vary, not only depending on the types of activities and the level of engagement with audiences (e.g. attendance at a performance or exhibition or participation in a two-day workshop) but also on the extent to which Festivals' have local (the Edinburgh Mela) or international reach (the Royal Edinburgh Military Tattoo).

For some of the Festivals (e.g. Edinburgh Festival Fringe), offering support and service to performers and delegates is one of their stated aims. However, for all Festivals, performers and delegates have a unique perspective on the Festival experience and many have attended comparable events. They are hence ideal 'proxies' for assessing the Festivals' quality and competitiveness. The same can be said for journalists attending and covering the Festivals.

There are a number of ways in which Edinburgh's cultural venues are affected by the Festivals. As hosts of the Festival activities they are a key delivery partner, but equally they are deriving significant economic value from these relationships. Moreover, they are affected by specific policy decisions of the Festivals. For instance, a Green Venue Scheme commissioned by Festivals Edinburgh (on behalf of the Festivals) has recently been introduced that will look to promote environmentally friendly practices among the venues used by the Festivals.

These groups are the most important stakeholders, in that they both have the greatest degree of influence on, and are mostly directly affected by, the Festivals. Therefore, the evaluation framework primarily focuses on the above groups. Nonetheless, it is worth looking at the wider group of stakeholders, as the extended remit of impact areas in this study is likely to address interests and concerns of these wider groups.

Wider stakeholders

One of the Festivals beneficiary groups that are part of the wider stakeholder environment, but which are included in the impact assessment, is businesses (primarily in the hospitality sector) in the local and wider Scottish economy. The Edinburgh Festivals Economic Impact

Study 2004/05 analysed weekly room occupancy rates and surveyed Edinburgh-based accommodation providers.³ It concluded that the Festivals boost occupancy throughout the year and, during the most busy summer Festival periods, lead to an increased uptake of 'accommodation at less well known hotels and guest houses, often further away from the city centre'. There are other statistics that suggest a positive impact of the Festivals on local businesses. For instance, the City of Edinburgh Council's pedestrian counter show higher footfall figures in Edinburgh's main shopping street during the Summer Festival period in August than during Christmas.⁴ While this study did not include any primary research with tourism businesses, the contribution that the Festivals make to the local and Scottish economy has been estimated according to the Treasury's *Green Book* principles.

There are other local businesses that do not directly benefit from the Festivals and, though outside the scope of this study, can also be considered to be part of this wider stakeholder landscape. This is because they may see short-term negative side-effects of the Festivals (e.g. traffic congestions or road closures during the summer Festival period), but also the benefits from the Festivals in the long term (e.g. increased attractiveness of the city overall, as well as skilled staff being attracted to Edinburgh due to its attractive cultural offer).

Although not directly included in the evaluation work, the Festivals also have an impact on the Edinburgh and Scottish cultural sector. The Festivals have an impact on the sector throughout the rest of the year by 'building' audiences that attend events outside the Festival period. In addition, the Edinburgh and Scottish cultural and events sector may benefit from increased capacity and expertise through a better trained workforce and volunteers.

In addition to the attending journalists, the Festivals have a wider relationship with the media organisations that are based elsewhere and report on the Festivals.

³ This survey included the main city hotels which are part of the Edinburgh Principal Hotels Association.

⁴ Source: Essential Trends, Essential Edinburgh, 2011:

http://www.edinburgh.gov.uk/downloads/file/3776/essential_trends_january_2011

The final stakeholder group are non-attending local users. Similar to the 'non-beneficiary' local businesses, these non-attending Edinburgh residents may experience negative side effects of the Festivals such as traffic congestion. However, a proportion of them may also place a so-called 'option value' (i.e. they may consider attending in the future) or 'existence value' (i.e. they like to know that the Festivals exist even if they never attend) on the Festivals.

Apart from the beneficiary businesses, the above wider set of stakeholders has not been included in the research.

3.1.3 Existing data collection and previous studies

As stated above, the impact assessment had to build, as much as possible, on existing research. In order to assess which information could be gained from such existing research and which data would need to be collected through additional primary research we conducted a review of documentation. Reviewing the Festivals' existing data tools and methods for collecting information helped to gain an understanding of the usefulness of this information to the individual Festivals (what do they learn? how does this inform their future planning? how do they use it to argue their case?) and for the Festivals collectively (the degree to which information from individual Festivals has been aggregated to better understand the overall Festival offer in the city).

The information that is currently collected by the partner organisations represented on the Steering Group (e.g. Edinburgh Visitor Survey, Edinburgh Resident Survey, VisitScotland National Visitor Survey) was reviewed, as were other frameworks that are used in the wider sector. The latter include:

- eventIMPACTS toolkit – a toolkit of resources to help event organisers improve their evaluation of the impacts associated with staging sporting and cultural events.
- Volunteer Scotland's Volunteer Impact Assessment Toolkit – provides a toolkit for measuring the impact of volunteering (on the volunteers themselves, the organisation, direct beneficiaries and audiences, and the wider community)

- Generic Learning Outcomes (GLOs) – a framework to measure the learning that takes place in informal education in the cultural sector
- Generic Social Outcomes (GSOs) – a framework to help evaluate the wider societal effects of learning and how cultural activities have an effect at the group/community level
- The Carbon Trust method for establishing the carbon footprint of economic activities
- Julie's Bicycle's methodology for monitoring and reducing the environmental impact of Festivals
- Impacts08 research – especially research around the online media impacts of the Liverpool European Capital of Culture programme
- other previous Festival evaluations, such as those undertaken by BOP/GHK on Newcastle/Gateshead's Culture 10 programme – in particular for a methodology for assessing cultural impacts
- indicators used by stakeholders to measure their priorities (e.g. Single Outcome Agreement, National Performance Framework, and Curriculum for Excellence).

These existing frameworks were reviewed in order to assess both a) the feasibility and b) the desirability of:

1. using existing approaches, outcomes, indicators directly
2. adapting existing approaches, outcomes, indicators

Through this process we also identified gaps that existed across these frameworks, and where the research therefore had to suggest:

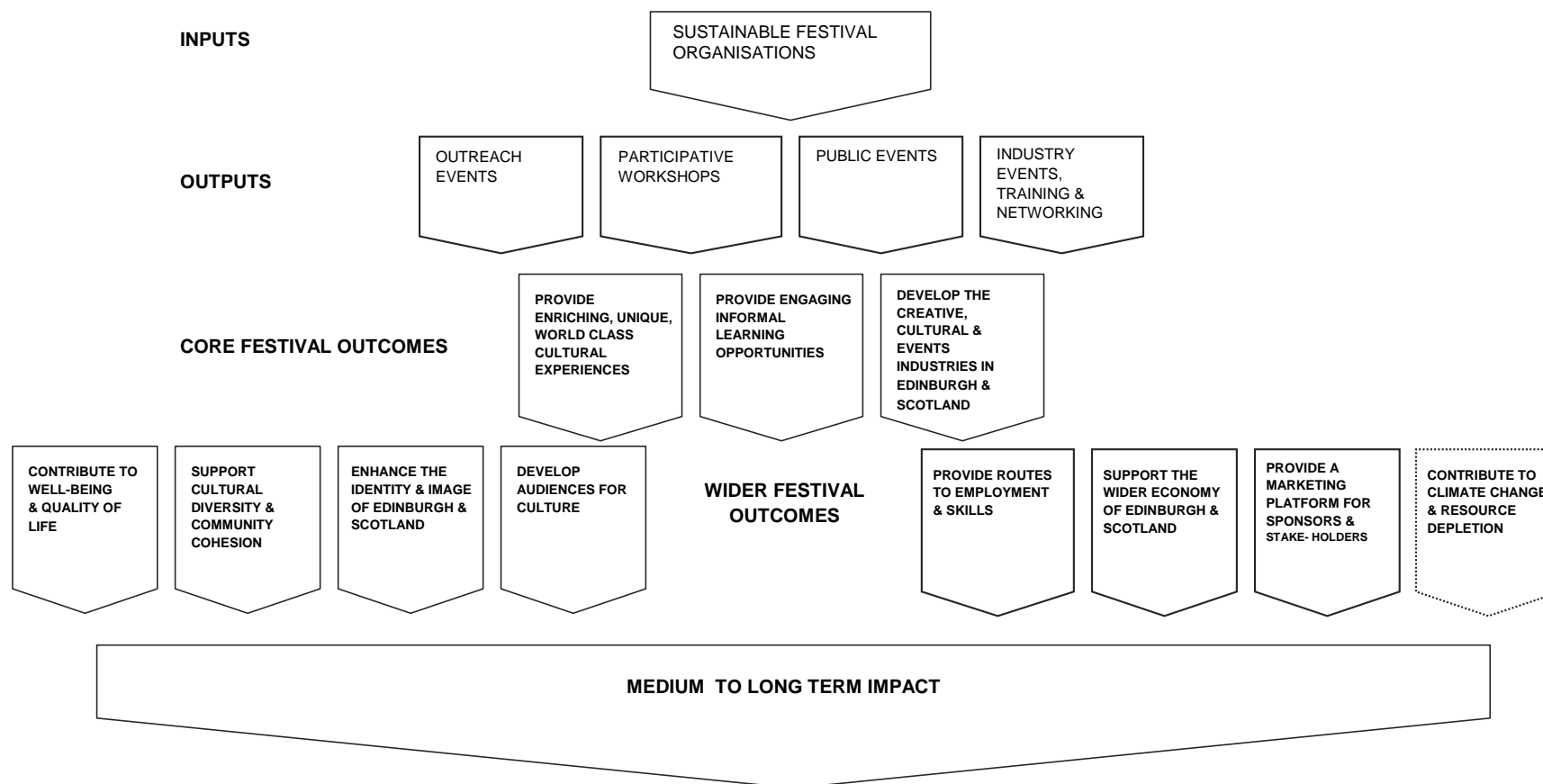
3. new approaches, outcomes, indicators

Based on the above steps, the evaluation framework was designed, including the overall logic model, outcomes and impacts, and detailed indicators.

3.1.4 Logic model

The Evaluation framework was developed using a logic model approach. Figure 3 shows the logic model underpinning the framework.

Figure 3: Logic model of the Edinburgh Festivals Evaluation Framework



Source: BOP Consulting (2011)

The logic model helps to illustrate the ‘pathway of change’ as it maps out how what the funders and organisers input into the Festivals (e.g. financial resources, organisational capacity, expertise) can be logically linked to what is produced (the Festival events and activities), how this determines the actual Festival experience of the various stakeholder

groups, and how this is further connected to a series of wider cultural, social, media, environmental and economic changes.

The evaluation framework is intended to cover the widest possible range of outcomes and impacts that may arise from across the portfolio of Festival activities. However, given the diversity of the

Festivals' structure, offer and priorities, it is not expected that a single Festival will achieve this full range of outcomes and impacts. For instance, the Royal Edinburgh Military Tattoo's main vision is to promote the military in the eyes of the public. It cannot therefore be expected to primarily deliver against outcomes to do with community cohesion.

What is important to note is that the logic model describes a step-by-step process. This means that in order to see any subsequent positive impacts from the Festivals' activities, it requires the core Festival experience (the performance, exhibition, workshop experience etc.) to be positive in the first instance. For example, if a first-time attendee at a Festival event enjoys the experience, this may then lead to that same person coming back to see a similar event in the future. Or if a Festival volunteer gains a deeper knowledge and understanding about films and the film industry, this may then lead to them increasing their employability and career prospects. However, in order to achieve such impacts at a later stage, the first engagement must have had a favourable result. This step-by-step principle is followed throughout the logic model.

3.1.5 Identification of outcomes

Once this overall logic chain was established, the detailed outcome and impact areas were developed. There are different ways of structuring these outcomes and the frameworks reviewed (see section 3.1.3) provide a useful reference. For instance, the Sheffield Hallam Festival Impact Assessment Toolkit, is structured around 4 major impact areas: economic, social, environmental and media impacts. Alternatively, as suggested by the Volunteer Scotland Volunteer Impact Assessment Toolkit, the framework could have been structured according to the different stakeholder groups (volunteers, organisations, beneficiaries and wider community). However, none of these existing frameworks fitted well enough with the requirements of the Festivals' impact assessment to be adopted in full. Therefore, the overall structure chosen for the evaluation framework follows the logical sequence of immediate core Festival outcomes and wider Festival outcomes.

The core Festival outcomes include the following more major outcomes:

1. Provide enriching, world class cultural experiences – which includes sub-outcomes looking at the event quality and audience satisfaction and enjoyment, a deepened and widened engagement with cultural forms, distinctiveness and innovation of the event, and widened access to high quality cultural experiences
2. Provide engaging, informal learning experiences – that help develop cognitive knowledge and understanding of the cultural form or subjects, as well as non-cognitive skills and contribute to personal development
3. Develop the creative, cultural and events industries in Edinburgh & Scotland – through supporting the professional development of participating artists/companies, Edinburgh's venue infrastructure and the Scottish cultural sector more widely

Building on these core Festival outcomes, the wider Festival outcomes include:

1. Develop audiences for culture – by increasing the likelihood of future participation and attendance
2. Enhance the identity and image of Edinburgh & Scotland – in particular, through increasing residents' pride in their local area, enhancing the image of Edinburgh as a visitor destination, promoting an outward looking, positive Scottish national identity to visitors, and generating an (inter)national media profile
3. Support cultural diversity and community cohesion – by increasing opportunities to meet people from other backgrounds, allowing better understanding of audiences' own/other cultures, bringing the local community together, and increasing audiences' quality time spent together as a family
4. Contribute to well-being and quality of life – both in terms of enhancing people's well-being more generally and in particular for the specific groups of children and young people, and older people
5. Provide routes to employment and skills – through contributing to the personal development of volunteers and temporary staff, their improved transferable skills and widened social networks and contacts

6. Support the wider economy in Edinburgh and Scotland – the economic contribution that the Festivals themselves, visitors, performers and journalists make in the local and Scottish economy
7. Provide a marketing platform for sponsors and stakeholders – by offering access to a particular target audience or to high quality corporate hospitality, through positive brand association or through delivering on corporate social responsibility (CSR) commitments
8. Contribute to climate change and resource depletion – the negative environmental impact of the Festival organisation directly, and the carbon footprint of associated venues, audiences, performers/delegates and production staff indirectly. This outcome area is the most developmental of the framework given the Festivals' early stage of engagement with the environmental agenda. Therefore, the framework suggests an approach and relevant indicators for assessing environmental impact; however, not all the Festivals were in a position to actually undertake full data collection for all of the indicators this year.

3.1.6 Development of indicators

In order for the evaluation framework to become a usable tool for data collection, a suite of indicators needed to be developed under each of the sub-outcomes. These indicators specify the information that is actually measured and collected through various research methodologies. It is through these measures that it can be demonstrated whether or not a particular outcome has been achieved.

In line with the objective of using, as much as possible, information from existing research and management information of the Festivals, and visitor/resident surveys, we reviewed this data to extract relevant indicators. There were three main challenges in doing so:

- Consistency – there was little consistency across the existing Festival research with regards to how information is collected. Even where the same type of information was collected, there were often subtle differences in the question details or answer options. For instance, the age ranges used to gather demographic information varied significantly across the Festivals and needed alignment.

- Comprehensiveness – the existing research had significant gaps in terms of the information required for the Edinburgh Festivals' evaluation framework. Only a small number of Festivals had collected economic impact indicators before and, across the Festivals, indicators looking at social and environmental impacts were largely missing. Similarly, the wider contextual data sources did not contain many relevant indicators. For instance, while the Edinburgh Resident Survey in 2007 included a question on the extent to which residents considered the Festivals to make Edinburgh a better/worse place to live, this question was no longer included in the most recent wave of the survey in 2009.
- Scope – some of the relevant questions that were included in the wider data sources were not specific enough for the purpose of the research. For instance, the Edinburgh Visitor Survey does include 'the Festival(s)' as one of the answer items to the question about visitors' main motivation for visiting. However, there is no way of disaggregating this information to the level of the individual Festivals. Similarly, the survey asks visitors to rate Edinburgh on the basis of a number of criteria (a potential indicator of quality), however the answer option 'cultural events/Festivals' is not specific enough to use it for the purpose of the evaluation framework.

In order to address these issues, it was therefore necessary to develop additional indicators. These evaluation specific indicators were integrated in the evaluation framework and sit alongside those indicators that were already in use by the Festivals and a small amount of indicators used in contextual data sources, including large scale UK-level surveys (such as the Citizenship survey or the National Survey of Volunteering).

3.2 Data collection

Following the development and workshop testing of the evaluation framework, the data collection phase began. There were two main data collection sources and processes: Festival-specific primary research and management information.

3.2.1 Festival-specific primary research

Gathering fresh data for all Festivals, rather than relying on historical data and estimates, was important to give the most robust impact assessment possible for 2010 – a solid baseline against which to measure impact assessment in subsequent years. In addition, it was crucial to carry out a dedicated primary research exercise given that many Festivals had never collected data on many of the indicators contained in the Evaluation Framework.

Therefore, the first task was to re-design existing Festival data collection processes to suit the needs of the evaluation framework. A staged approach was taken to this task, following the Festivals calendar (starting with the Edinburgh International Science Festival at the start of April and culminating with Edinburgh's Hogmanay in December/January). Due to the timing of the research project, the Evaluation Framework could not be finalised before the start of the Edinburgh International Science Festival. For this reason, a number of relevant indicators could not be included in the 2010 primary research for this Festival and will need to be added in subsequent years of the research.

One of the key requirements of the impact assessment was to ensure that the process and outcomes are wholly owned by and meaningful for each of the Festivals. While the SQW study was conceived as a 'top-down' exercise based on a single visitor questionnaire which was conducted as an assisted, on-street survey during the Festivals, the 2010 study required a 'bottom-up' approach. It was therefore critical for the impact assessment to take account of two main issues.

Firstly, and as mentioned above, the diversity of the Festivals is reflected in the types of impacts that they generate. Not all of the outcomes and indicators in the evaluation framework are equally relevant for each Festival and this had to be considered in the design of the research tools. As a result, it was impossible to design one standard questionnaire to be used across all the Festivals. Rather, the research was adapted in a number of ways to meet the specific needs of each individual Festival:

- Question formats: where Festivals already asked questions about a particular indicator, as much as possible, we kept the question in the current format. For instance, most Festivals asked a question about audience satisfaction. In order to keep consistency with their research in previous years, these questions were kept in the existing format. In other cases, we asked the same question across the Festivals, but made slight amendments to the question format to adapt to the research cohort. For instance, we used a number of negatively keyed questions in order to avoid positive response bias in most of the Festivals' questionnaires (see section 4). However, given that these questions are more difficult to understand and, for a significant proportion of the Edinburgh Mela audiences, English is not their first language, we decided to exclusively use positive statements and questions for this Festival. It should be noted that there were several areas where we had used exactly the same question format across all Festivals, in particular the questions relating to the economic impact assessment. Also, where we introduced new questions that had not been asked before by the Festivals, we again ensured that the same question format was used.
- Selection of questions: it was not appropriate to collect information on all the outcomes for all Festivals. Instead, a core set of questions was asked across all Festivals (mainly relating to the economic and the environmental impact areas), and additional questions were added as appropriate for each Festival (e.g. the question relating to the outcome of increased quality family time was only asked for Festivals that have a specific remit to reach out to children and family audiences).
- Research cohorts: as discussed in section 3.1.2, there is a wide range of stakeholders that could be consulted as part of the research. However, it was not appropriate to survey all of these cohorts for all Festivals. Therefore, the decision was taken to survey general audiences for all Festivals. Moreover, performers or delegates, attending journalists, volunteers or temporary staff and sponsors were included in the research for most of the Festivals. A small number of Festivals also surveyed teachers and young people.

Secondly, it was important to take account of the varying capacity of the Festivals. Using a 'bottom-up' approach has meant being more flexible with how and when surveys of visitors have been conducted, to accommodate the varying demands and capacities of the individual Festivals. This also meant working closely with the Festivals' market research partners, in particular, The Audience Business (TAB)⁵ to link in with existing research activities and to facilitate on-the-ground delivery. Across the twelve Festivals there was therefore a mixture of on-site assisted surveys that were completed during the Festivals, self-completion surveys completed during the Festivals, and online surveys completed largely after the relevant Festivals have closed. Figure 4 shows an overview of the primary research that was conducted with each of the Festivals. The study methodology highlighted a particular challenge for non-ticketed events in terms of obtaining reasonable volumes of audience survey responses. This particularly impacted on the Edinburgh Art Festival but equally applies to other non-ticketed events such as the Fringe Royal Mile and the International Festival Fireworks. More thought needs to be given to address this issue in the future (see section 8).

An econometric analysis has been conducted and has confirmed that no bias across the economic variables has been introduced based on the different survey methods (for further details see the Technical Appendix).

⁵ TAB is the first audience development agency in Scotland, working with broad cross-section of Edinburgh's theatres, galleries, museums, Festivals and large scale touring companies.

Figure 4: Overview of Festival-specific primary research

FESTIVAL	2010 RESEARCH	FESTIVAL	2010 RESEARCH
Edinburgh International Science Festival	F2F & self-completion audience questionnaires	Royal Edinburgh Military Tattoo	F2F audience survey (econ + env questions)
	Pre and post self-completion questionnaires for young people		Post-Festival online audience survey (cult + soc questions)
	Assisted child questionnaire developed & piloted		Post-Festival online attending journalists questionnaire
Bank of Scotland Imagine Festival	F2F & self-completion audience questionnaire	Edinburgh Festival Fringe	Post-Festival online temp staff survey
	Post-Festival email teacher questionnaire		Post-Festival online audience survey
	Post-Festival email delegates questionnaire		During/post-Festival online performing company survey
Edinburgh International Film Festival	Post-Festival email performing company survey	Edinburgh International Festival	During/post-Festival online arts industry survey
	Post-Festival online audience questionnaire		Post-Festival online attending journalists questionnaire
	Post-Festival online delegates questionnaire		Post-Festival online temp staff survey
Edinburgh Jazz and Blues Festival	Post-Festival online attending journalists questionnaire	Edinburgh International Book Festival	F2F audience survey (econ + env questions)
	Post-Festival email volunteer survey		Post-Festival online audience survey (cult + soc questions)
	Post Festival online audience survey		Post-Festival email teacher questionnaire
Edinburgh Art Festival	Post-Festival online attending journalists questionnaire	Edinburgh's Hogmanay	Post-Festival online performing company survey
	Post-Festival online volunteer survey		Post-Festival online attending journalists questionnaire
	Post Festival online audience survey		Post-Festival online volunteer survey
Edinburgh Mela	Post-Festival online attending journalists questionnaire	Edinburgh's Hogmanay	Post-Festival online temp staff survey
	Post-Festival online volunteer survey		Post-Festival online audience survey
	F2F audience survey		Post-Festival email teacher questionnaire
Scottish International Storytelling Festival	Post-Festival online performing company survey	Edinburgh's Hogmanay	Post-Festival online delegate survey
	Post-Festival online attending journalists questionnaire		Post-Festival online attending journalists questionnaire
	Post-Festival online volunteer survey		Post-Festival online temp staff survey
	Post-Festival online volunteer survey		Post-Festival online audience survey
Scottish International Storytelling Festival	Self-completion audience survey	Edinburgh's Hogmanay	Post-Festival online performing company survey
	Post-Festival self-completion delegate and performer survey		Post-Festival online attending journalist survey
	Post-Festival online teacher survey		Post-Festival online temp staff survey
	Post-Festival self-completion temp staff		

Source: BOP Consulting, (2011)

3.2.2 Management information

While the primary research generates the information for the largest part of the evaluation framework (in particular, the outcomes and impacts sections), there was a set of data that needed to be provided by the Festival organisers themselves. A spreadsheet template was designed and sent out to the Festivals for completion. This management information template collected information on the following areas (particularly relevant to the input and output sections of the evaluation framework):

- Financial information on Festival organisers' income – including earned income, public sector funding, fundraising and sponsorship activities
- Financial information on Festival organisers' expenditure – including on staff, year-round premises, performers and other costs related to staging the Festival
- Key information on performers/artists – in particular total numbers
- Human resources data – including staff and volunteer demographics and information about staff development
- Information on community engagement activities
- Information on Festivals' fair trade policies and practice
- Information on Festivals waste and energy consumption, both directly (as Festival organisers in relation to staging the Festival) and indirectly (through Festival venues)
- Key Festival outputs – including total number of events/industry sessions/workshops, and attendances at each of these

Where necessary, additional clarification was sought from the Festivals in order to ensure that data was reported consistently across the Festivals.

4. Core Festival outcomes

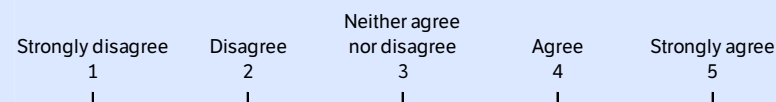
The following sections 4 to 6 present the findings from the Edinburgh Festivals impact research. This chapter describes the core Festival outcomes, i.e. the immediate outcomes that relate to the actual Festival experience itself. Chapter 5 presents wider outcomes of the Festivals and Chapter 6 looks at sustainability issues related to the Festival organisations.

The results presented in these sections are based on the primary research and management information from the twelve Festivals. Apart from the discussion of the economic impacts, results are presented as aggregate figures across all of the Festivals. The table below shows an overview of the sample sizes for each Festival and research cohort.

As becomes clear from this overview, the response rates achieved in this study are extraordinarily high for this kind of research. This is particularly true for audience responses, but response rates are very good across all research cohorts. They are also considerably higher than in the previous 2004/05 economic impact assessment (which included slightly more than 4,000 audience members, 115 performers and 25 journalists). This means that, in terms of the response rates, the research findings are highly robust across all the Festivals and strong at the individual Festival level. Nevertheless, it is important to note the distribution of responses when looking at the below results, as larger response numbers from one or two Festivals may have overly determined the results. Similarly, it should be borne in mind that there is variation between the overall response figures between the different research cohorts. For details on responses for each question, please see Appendix 9.3.

Report charts for attitudinal statements

Sections 4 and 5 of the report include a series of charts to illustrate the survey results. Unless otherwise specified, the charts are showing the responses to attitudinal questions using a Likert Scale of responses. A Likert Scale question requires respondents to specify their *level of agreement* with a particular statement. The Likert Scales used in this report are 5-items scales (i.e. they offer 5 possible responses to each statement) as follows:



The intervals between each answer option are considered to be equal. Therefore, it is possible to calculate the *average* of all responses to this question, i.e. a numeric value between 1 and 5 which indicates the average level of agreement across all the responses. For instance, if 10 people 'strongly agree' (=5) and 10 people 'agree' (=4), the average agreement level is 4.5. The higher the average, the more people agreed with this statement overall.

The charts within this report use the average level of agreement in order to present the survey results. The advantage of using averages is that they are easier to benchmark against subsequent years of research.

Negatively keyed statements

A common problem in researching people's opinions and attitudes is that they are prone to what is termed 'positive response bias'. This means that people are more likely to agree with a statement if it is phrased positively. In order to avoid this, we introduced some negatively keyed statements: e.g. rather than 'The Festival has increased my well-being', we used the statement 'The Festival made no difference to my well-being.'

Where we have used negatively keyed statements, the chart averages then follow the opposite logic: a lower average means that more people *disagreed* with the negative statement – i.e. they actually have a positive opinion about the Festivals.

Figure 5. Number of survey responses, by Festival and visitor segment, to the Edinburgh Festivals, 2010

Festival	Audience	Audience ⁶	Delegates/ Performers/ Companies	Temporary Staff	Volunteers	Teacher/ Schools	Journalist
Science	639						
Imagine	136		41			37	
Film	756		167		8		93
Art	65				11		
Jazz	362				10		
Tattoo	6,613	534		2			
Fringe	2,167		261	22			
Mela	318		15		34		
International	1,199	688	53	27	78	15	
Book	1,526		165	43		62	
Storytelling	185		21	2		26	
Hogmanay	418			12			20
Summer Festivals ⁷							256
Total	14,384	1,222	723	108	141	140	369

Source: BOP Consulting (2011)

⁶ Both the Edinburgh International Festival and the Royal Edinburgh Military Tattoo administered two separate questionnaires: an onsite face-to-face questionnaire including the economic and environmental impact questions and a follow-up online questionnaire with the cultural, social and media impact questions. The figures in the first column are the responses for the online survey and the figures in the second column are the responses for the face-to-face research.

⁷ Most journalists attend several Festivals during the summer Festivals. Therefore it was not appropriate to administer separate journalist surveys for each Festival but only one survey was administered for all the summer Festivals.

4.1 Cultural impact: Provide enriching, world class cultural experiences

Providing an enriching, world class Festival experience lies at the heart of all the Festivals. However, as mentioned above, a positive Festival experience is also a pre-condition for any of the wider Festival outcomes or impacts that may occur at a later stage. In the sections below we describe those outcomes that directly arise from the Festival activities or events.

4.1.1 Enjoyment, satisfaction and quality

An overall enjoyable, satisfying event experience is an important outcome on which many of the other outcomes depend on. Therefore, we included a number of questions that look at Festival audiences and participants' overall satisfaction and enjoyment of their attendance.

A number of Festivals included questions on audience satisfaction in their surveys. Satisfaction is measured with regards to a variety of factors, some regarding the Festival programme itself (e.g. the content of a talk series), but most of them assessing the events' ancillary services (such as booking experience, marketing material, venue facilities or the friendliness of front-of-house staff). Given that most Festivals had asked such questions in the past, no standard audience satisfaction question was asked across all the Festivals and therefore no aggregate results can be reported this year. In the future, the Festivals may wish to consider introducing a common satisfaction question.

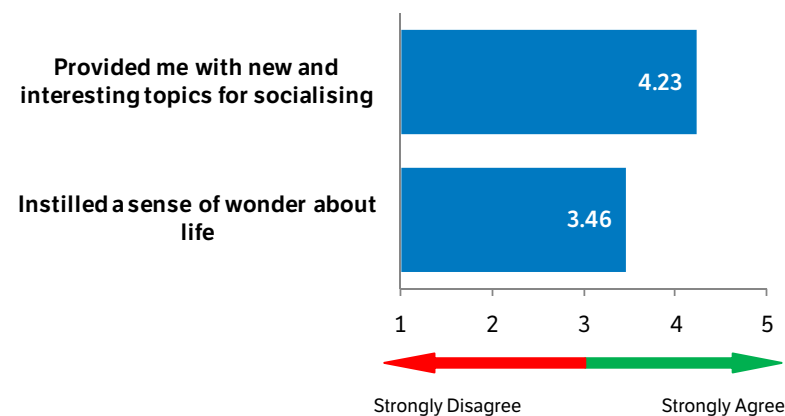
The overall satisfaction of children audiences with the event was assessed by asking parents and teachers to rate what score children would give the Festival event attended out of 10 (with 10 being the most positive rating). The results from those Festivals with specific children events show that children overwhelmingly enjoyed the experience: the average score given by parents on behalf of their children was 8.46. We also asked teachers and the score they gave was only slightly lower at 8.12.

Performers were also asked to comment on their overall event experience and satisfaction. There is widespread and high satisfaction among performers and delegates across the Festivals: 85% stated that they were overall satisfied with the Festival experience from their perspective as an artist or delegate, including 42% saying that they were very satisfied.

In addition to overall satisfaction, the Festival events provide opportunities for enjoyable experiences in a social context, i.e. going for an event with friends or family. This is strongly confirmed by the Festival audiences asked: almost nine out of 10 people (88%) agreed with the statement that the Festival event has given them an opportunity to have an enjoyable social experience, including 39% who strongly agreed.

As well as looking at the extent to which Festivals provide an overall enjoyable and social experience, we were interested in testing out a more explorative indicator. This looks at the ability of cultural experiences to stimulate reflective and inquisitive thoughts and experiences. We therefore asked audiences of a number of Festivals whether or not they felt that the Festival events had 'instilled a sense of wonder about life'. Just under half of all audiences (48%) agreed with this statement, while 39% neither agreed nor disagreed.

Figure 6. Audiences' enjoyment of Festival events (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

Overall satisfaction and event enjoyment are closely linked to the quality of the event. One way of assessing the quality of the Festivals is in comparing the events to other Festivals or similar events. While such benchmarking is not uncontroversial, remaining competitive among other Festivals and events is a key driver and recommendation of the *Thundering Hooves* strategy:

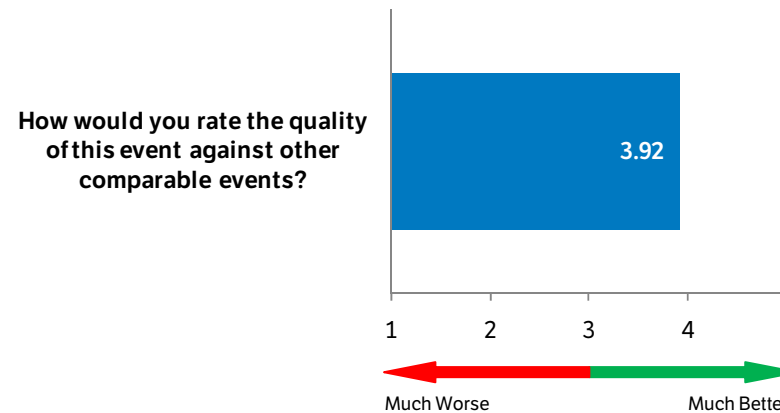
“[The Edinburgh Festivals’] evolution has served as a model for many of the world’s leading international Festivals. However, the client group is concerned about the gradual attrition of Edinburgh’s competitive position and, with it, a long term decline in its status as a cultural city in the eyes of artists, promoters, audience and media, disadvantaging both the Festivals and Edinburgh alike. [...] Our conclusion is that when viewed against the sustained development of some of the actively competitive cities over a time span of the next five to seven years, Edinburgh’s current enviable position as a pre-eminent Festival city is vulnerable.”⁸

Moreover, in the Single Outcome Agreement of the Scottish Government, under the National Outcome ‘We live in a Scotland that is the most attractive place for doing business in Europe’, one of the sub-outcomes is dedicated to the Edinburgh Festivals and states the ambition that ‘Edinburgh’s Festivals have a global competitive edge.’ The suggested measures for this outcome (total attendances, income and number of jobs) are however not very appropriate on their own to assess competitiveness, as they do not provide any element of comparison.

In line with this, audiences and teachers were asked to compare their Festival experience to other events that they have attended. Audiences and teachers were asked to rate the quality of the event against other comparable events that they had attended and the Edinburgh Festivals fare better than their comparators for both groups:

on a scale from 1=much worse to 5=much better, the audiences average was 3.92 and the teacher average 3.74.

Figure 7. Audiences’ ratings of quality of Festival events against other comparable events (1=much worse, 5=much better), 2010



Source: BOP Consulting (2011)

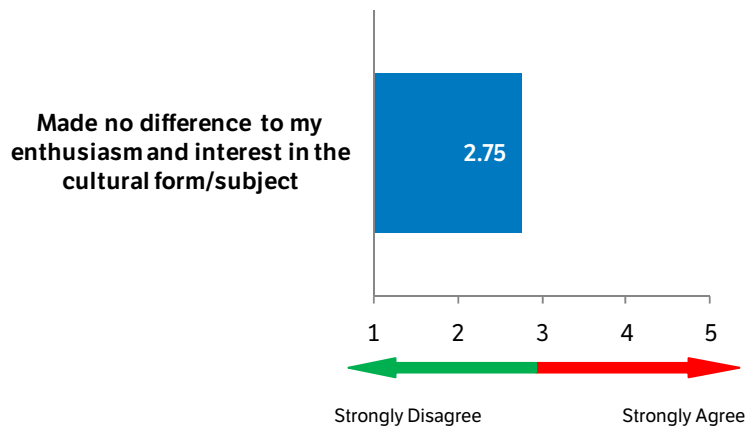
In addition to audiences and teachers, we asked journalists to rate the quality of the Festivals’ events. Almost nine out of ten journalists (87%) agreed or strongly agreed that the Festival ‘had a high quality programme of events’, including 35% who strongly agreed. Only 3% disagreed with the statement.

⁸ AEA Consulting (2006) *Thundering Hooves: Maintaining the Global Competitive Edge of Edinburgh’s Festivals*, report commissioned by Scottish Arts Council in partnership with Festivals Edinburgh, the City of Edinburgh Council, the Scottish Executive, EventScotland and Scottish Enterprise

4.1.2 Deepening and widening engagement with a cultural form

Attending the Festivals gives audiences the opportunity to both deepen and broaden their engagement with the cultural form that they are attending. In terms of more in-depth engagement, the indicator chosen looked at the extent to which the Festivals contribute to people's increased enthusiasm and interest in the cultural form. Interpreting the negatively phrased statement⁹, 46% of audiences felt that their Festival attendance had made a difference to their enthusiasm and interest and a further quarter felt neutral.

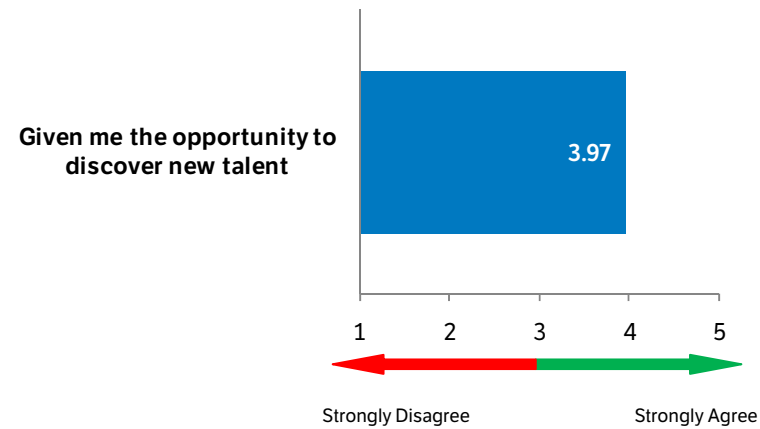
Figure 8. Audiences' enthusiasm and interest in the cultural form/subject (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting, 2011

We also tested whether the Festivals played a role in terms of broadening audiences' experience, through introducing them to new elements of a cultural form. 77% of audiences respond positively to the question whether the Festival has enabled them to discover new talent, genres or styles (including 28% who strongly agreed with this statement).

Figure 9 Audiences' deepened engagement with the cultural form/subject (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

Moreover, we asked journalists attending the Edinburgh International Film Festival about the range of talent, genres and styles showcased at the Festival. Two thirds of them disagreed (including 18% who strongly disagreed) with the negatively keyed statement 'The Festival showed too few films that showcase new talent, genres and styles' (only 10% agreed with this statement).

Finally, we explored whether the Festivals encouraged risk-taking in audiences' cultural consumption. More than three quarters (76%) of attending journalists agreed (including 29% who strongly agreed) that the Festival 'had encouraged audiences to take a risk in experiencing unfamiliar arts works or events'. Only 9% disagreed with this statement.

⁹ 31% disagreed and 15% strongly disagreed that the Festival experience 'had made no difference to their enthusiasm and interest' in the cultural form or subject.

4.1.3 Distinctiveness and innovation

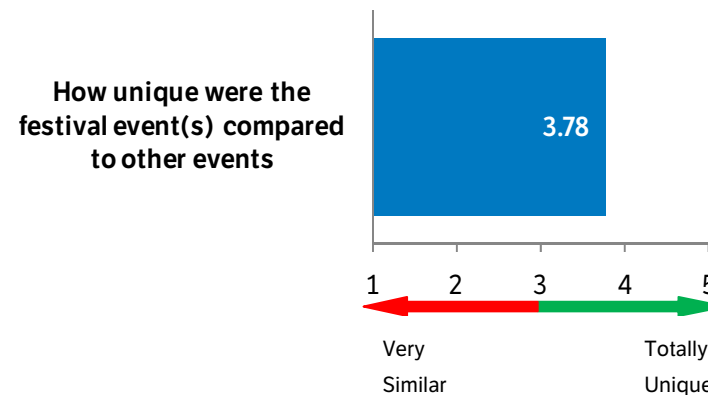
In order to remain competitive and 'pre-eminent', the *Thundering Hooves* strategy emphasises the need for the Festivals to be distinctive and to stand out through innovation within their respective art forms:

"There appears to be an increasing homogenisation in the programmes of similar types of Festivals, which claim they are distinctive, but are clearly not so when viewed alongside their peers, as the market for presentations becomes increasingly global. [...] Edinburgh's strategy as a Festival City is one of pre-eminence. [...] This means that the stakeholder strategy should be to ensure that available resources for funding are focused on those aspects of the Festival offer that do or can attain a degree of distinctiveness and pre-eminence within their respective art forms."¹⁰

In order to assess the distinctiveness of the Festivals, two indicators were included in the study: a question about the uniqueness of the Festivals and whether or not the Festivals were a 'must-see event'. Both audiences and teachers were asked to rate, on a scale from 1 = 'very similar' to 5 = 'totally unique', the uniqueness of the Festival event attended. Both groups consider the Festival events to be distinctive, however audiences slightly less so than teachers (averages of 3.78 and 4.03 respectively).

In line with this, 35% of audiences strongly agreed and 44% agreed that the Festivals have given them 'a chance to participate in a must-see event'. Only a small minority of 5% disagreed with this statement, with the remaining audiences not being decisive.

Figure 10. Audiences' rating of the uniqueness of Festival events against other comparable events (1=very similar, 5=totally unique), 2010



Source: BOP Consulting (2011)

Considering that journalists cover a range of different Festivals, they are a particularly good proxy for assessing the distinctiveness of the Festivals. We therefore asked them to state their agreement with the negatively keyed question: 'The Festival lacks a distinctive vision that sets it apart from the other Festivals'. Almost two thirds (64%) of the attending journalists disagreed with this negative statement, including 24% who strongly disagreed. Only 12% agreed or strongly agreed with this statement.

Furthermore, we asked journalists whether they felt that the Festivals presented 'work that can easily be seen in other parts of the UK.' The majority of journalists (59%) disagreed with this statement (including 15% who strongly disagreed) and only 17% did agree.

Closely related to distinctiveness, the Festivals are also required to drive innovation. One of the recommendations of the *Thundering Hooves* report clearly states: "The cultural programmes must be curatorially focused and continually innovating; investment in innovation is a prerequisite of sustainability."¹¹ The report sets out a number of

¹⁰ AEA Consulting (2006)

¹¹ AEA Consulting (2006)

suggestions in which the Festivals could innovate (e.g. the use of unusual venues or spaces as Festival locations). For the purpose of the study we mainly focus on innovation through programming, in particular through new work and premieres.

Virtually all Festivals report that they have presented new works and premieres: 1,424 in total.¹² This needs to be seen in the context of the number of events presented overall at the twelve Festivals. Overall, the Festivals presented 4,652 events in 2010. The percentage of premieres and new work is then significant, amounting to almost one third (31%) of all events. Obviously, the proportion of new works and premieres out of the total number of events varies significantly across the Festivals, from 1% at the Edinburgh Mela¹³ to 84% at the Edinburgh International Film Festival.

Therefore, it is not surprising that the responses of journalists who were asked about the Festivals innovation were equally positive. 71% of attending journalists disagreed (including 20% who strongly disagreed) with the negative statement that the Festivals ‘showcased too few exciting and innovative works.’

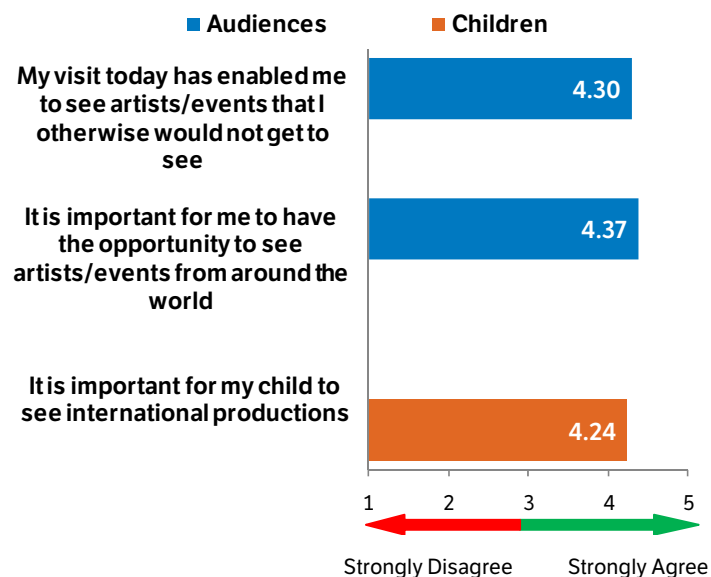
4.1.4 Widening access to high quality cultural experiences

In addition to showcasing new work and premieres, the Festivals also present work that is otherwise not accessible or available to Festival audiences (in particular international work). By doing so, the Festivals not only contribute to their distinctiveness, but they also contribute to widening access to such high quality cultural experiences.

As shown in Figure 11, there was a strong agreement among audiences when asked about the degree to which it is important for

them to have the opportunity to see releases, productions or artists from around the world (average of 4.37 on a scale from 1 to 5). Moreover, parents were asked at the Imagine Festival whether they felt it was important for their children to attend international productions. 83% agreed with this statement, including 45% who strongly agreed.

Figure 11. Children’s and adult audiences’ access to high quality cultural experiences (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

Rather than just looking at whether people value seeing work from around the world, we then asked audiences about their opinion as to whether the Festivals had offered them such opportunities. Again, they responded very positively: 93% of audiences agreed that the Festival had given them the opportunity to access work that they are otherwise not able to see, including more than half who strongly agreed (54%). When asked of volunteers, the survey results are also very positive: 85% of volunteers agreed with the statement that the Festivals had given them the opportunity to access work that they would otherwise not get to see (including 44% who strongly agreed).

¹² These figures do not include the Edinburgh International Book Festival, which presents new authors and books every year (but as every live Book Festival event is a one-off, does not classify them as ‘premieres’) and the Royal Edinburgh Military Tattoo (which as a show is curated newly every year).

¹³ The Mela reported one World Premiere, the theatre production CARGO, that was specifically commissioned for the Festival supported by the EXPO fund. The production was performed several times, including during the Edinburgh Festival Fringe; however, it was only counted once as ‘premiere’ in the above calculations.

We also asked journalists attending the Festivals whether they felt that the Festivals helped ‘widening audiences’ access’ to the particular art form and they overwhelmingly felt positive about the statement. 83% agreed (including 39% who strongly agreed) with the statement. Only 5% disagreed.

4.1.5 Summary and conclusions

The research finds that audiences are very satisfied with their experience of the Edinburgh Festivals. Indeed, they rate the events as better than other comparable events and activities. Audiences value the Festivals because they give them the opportunity to have an enjoyable social experience with friends and family, but also because they result in a number of specific cultural benefits.

- Audiences value world class and international cultural experiences – and the Festivals provide these.
- Through the Festivals, audiences are able to engage more deeply with the many art forms, including discovering new artists, new styles and new genres.
- Audiences consider the Festivals to be unique and distinctive – standing out from comparable events.

Providing such enriching, world class cultural experiences lies at the heart of all the Festivals. A positive Festival experience is also a prerequisite for many of the wider social and economic outcomes that may arise (in the sense that a good Festival experience may shape visitors’ views about the city itself in a positive way and make them more likely to return, garner more positive media attention, and so on).

4.2 Learning impact: Provide engaging, informal learning experiences

The Festivals offer a wide range of learning opportunities, both for adults and children. These occur at each of the Festival events, at more in-depth workshops, or indeed at educational and outreach events that take place throughout the year outwith the Festival period (however, for the purpose of the study, only learning events taking place during the Festival period were included in the research).

Across the twelve Festivals, there were 4,652 events, including 1,056 for children and young people (aged 0-19 years). There were 4,272,228 attendances across all the Festivals in 2010. Our survey results show that 14% of all audiences were children and young people (aged 0-19). Inevitably, the proportion of children attendances varies across the Festivals. For instance, all of the Bank of Scotland Imagine Festival's performances are first and foremost for child audiences (though adults accompany children at these events). In contrast, children only make up for a very small proportion at the main programme of the Edinburgh International Festival (approximately 4%).

The Festivals offered 388 participative workshops, including 329 for children and young people. Not all of the Festivals were able to provide detailed attendances figures for these workshops but there were at least 32,055 attendances, 95% of which were made by children and young people.¹⁴ More than half of these attendances by children (54%) were accounted for by the Edinburgh International Science Festival.

While some of the Festivals work directly with the formal education sector, including making links to the Curriculum for Excellence (e.g. Edinburgh International Book Festival), in most cases such learning processes occur within a more informal setting, i.e. through the experience of a particular Festival event. The former sometimes involves more sustained education and outreach work

throughout the year, outside of Festival time, in order to tie in with the academic calendar (as is the case with the Edinburgh International Festival and Edinburgh International Book Festival, for example). The majority of the audience interaction with the Festival events, however, is a shorter engagement (attendance at an exhibition or performance).

There is a fair amount of literature that looks at the learning outcomes of cultural experiences. While it is probably true that the greater part of the research looks at sustained, participative cultural activities rather than attendance at events, the types of outcomes are likely to be similar for both, albeit with a different degree of impact.

4.2.1 Improving knowledge and engagement with the subject or cultural form

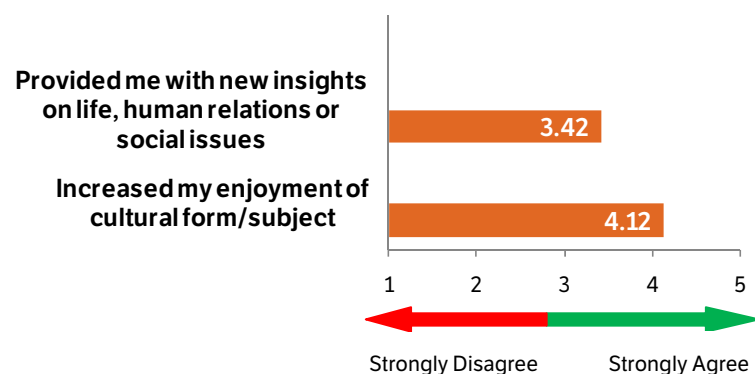
Of particular relevance to the cultural sector is a body of educational research ('socio-cultural and constructivist' research) in which learning is seen as 'fundamentally experiential and fundamentally social' and as a process of 'engaging in social practice.'¹⁵ This emphasis on the experience and context of learning is important as one of the unique contributions that the cultural sector has to make in this area is that it provides learning experiences that are also enjoyable and creative experiences (according to most evaluation in this area).

One of the indicators the study therefore looked at was whether the Festivals contributed to increased enjoyment in the cultural form or subject of the event. Audiences of three Festivals (Edinburgh International Science Festival, Edinburgh Art Festival and Royal Edinburgh Military Tattoo) were asked whether their attendance had increased their enjoyment of the cultural form or subject and a large majority (79%) agreed with this statement, including 36% who strongly agreed. A little less than one fifth of the audiences (18%) neither agreed nor disagreed.

¹⁴ Please note that there is a likely overlap between the attendances at the workshops and overall events attendances.

¹⁵ Moussouri (2002) *A context for the development of learning outcomes in museums, libraries and archives*; report for Re:source.

Figure 12 Audiences' learning outcomes (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

The extent to which cultural experiences increase enjoyment in a particular cultural form or subject area therefore becomes the driver for further learning. Indeed, there is some research evidence that links the enjoyment of a learning experience with the success of it as a pedagogic process.¹⁶ For instance, the OECD Reading for Change Research found that reading for pleasure is a strong indicator of academic success.¹⁷ Similarly, research undertaken by the Centre for Education and Industry at Warwick University found a correlation between enjoyment and subject learning in museums.¹⁸ Furthermore, a recent Systematic Literature Review carried out as part of the Culture and Sport Evidence Programme (CASE) concluded that participation in arts activities (including dance and music activities) improves young people's

cognitive abilities (based on various measures of intelligence) and higher attainment in school subjects such as English and Mathematics.¹⁹

Through the study we wanted to explore some of these issues in more detail. Teachers were asked whether they felt that attending the Festivals had increased the children's interest in the cultural form or subject and there was clear agreement with this statement: 88% of them agreed or strongly agreed. Interestingly, while the overall level of agreement is the same at the Imagine Festival, there is a higher proportion of teachers who strongly agreed with this statement (34% vs. 28% across all Festivals).

Teachers were more hesitant when asked whether the event had helped the children's understanding of curriculum areas. Approximately one third (32%) agreed (including 5% who strongly agreed). But almost half of the teachers (47%) neither agreed nor disagreed, and 21% disagreed (including 4% who strongly disagreed) that the event had increased children's understanding of curriculum areas. Keeping this in mind, the results from the following question then suggest that – rather than covering core curriculum issues – the Festival events provide enrichment to the day-to-day school learning. Indeed, eight out of 10 teachers agreed that the visit has been a 'useful addition to the Curriculum for Excellence' (with another 15% neither agreeing nor disagreeing).

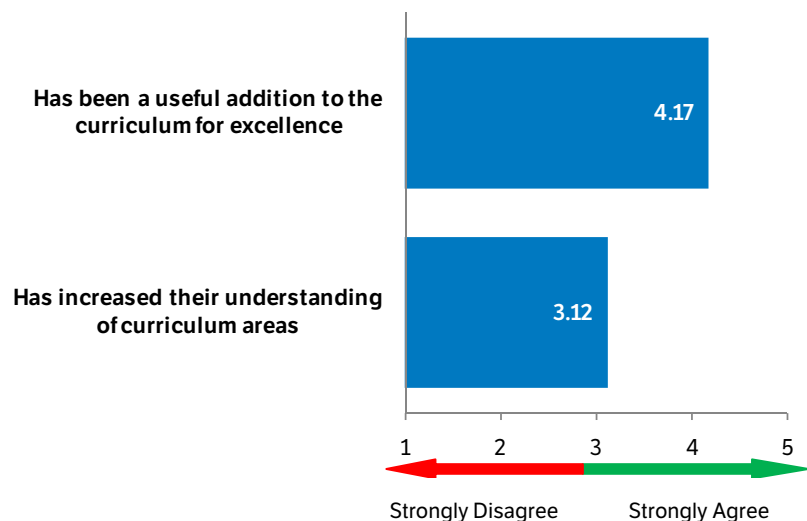
¹⁶ BOP (2006) *Review of museums, libraries and archives activity with children and young people*, report for Museums, Libraries and Archives (MLA) Council for England, MLA North West and Renaissance North West.

¹⁷ Twist, I., Sainsbury, M., Woodthorpe, A., Whetton, C., (2003) *Reading All Over the World*. PIRLS National report for England, NFER

¹⁸ Stanley, J et al, (2004) Final report on the Impact of Phase 2 of the Museums and Galleries Education Programme, Centre for Education and Industry, University of Warwick

¹⁹ CASE (2010) *Understanding the impact of engagement in culture and sport. A systematic review of the research on the learning outcomes for young people participating in the arts*, Report carried out for DCMS, ACE, English Heritage, MLA and Sport England

Figure 13. Learning outcomes for school children, assessed by teachers (1=strongly disagree, 5=strongly agree), 2010



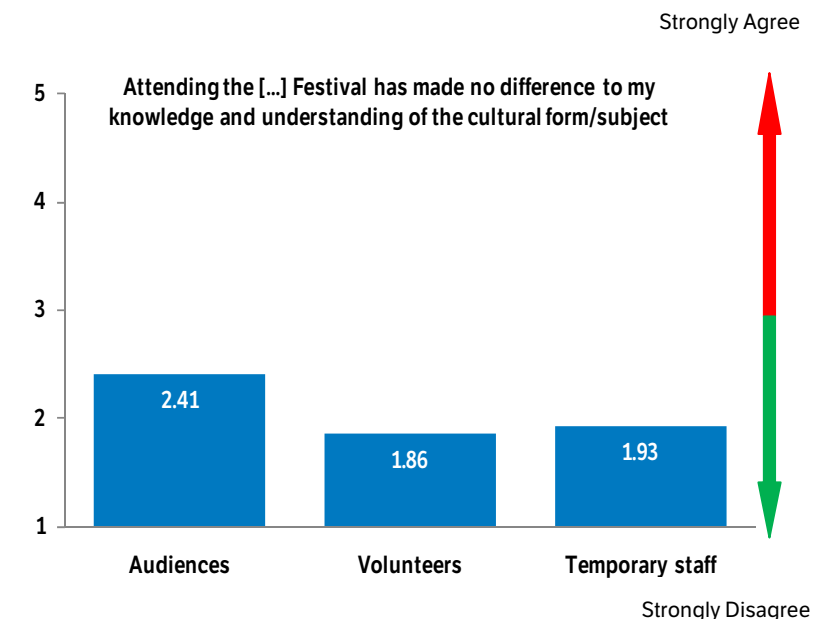
Source: BOP Consulting (2011)

The study did not only look at school-related learning but also at the learning that takes place for adult audiences or volunteers and temporary staff. A majority of Festival audiences confirmed that they had increased their knowledge and understanding of the subject or cultural form. Interpreting the negatively phrased statement²⁰, 59% felt that the Festival event has made a difference to their knowledge and understanding. A further quarter of the respondents were undecided. In addition to increased understanding of the cultural form itself, we asked all Festival audiences about the contribution of the Festivals to their increased understanding of wider social issues. Many Festivals cover such issues through their programming (e.g. talks about climate change at the Science Festival). A little less than half (45%) generally agreed that the Festival had 'provided [them] with new insights on life, human relations or social issues'. Another 41% stated that they neither agreed nor disagreed.

²⁰ 59% disagreed or strongly disagreed that the Festival event 'has made no difference to their knowledge and understanding'.

Volunteers and temporary staff were decidedly more positive when it comes to their experience of knowledge acquisition and deeper understanding. Interpreting the negatively phrased statement²¹, 85% of both groups felt that the Festival had made a difference to these areas.

Figure 14. Increased knowledge and understanding of audiences, volunteers and temporary staff (1=strongly disagree, 5= strongly agree), 2010



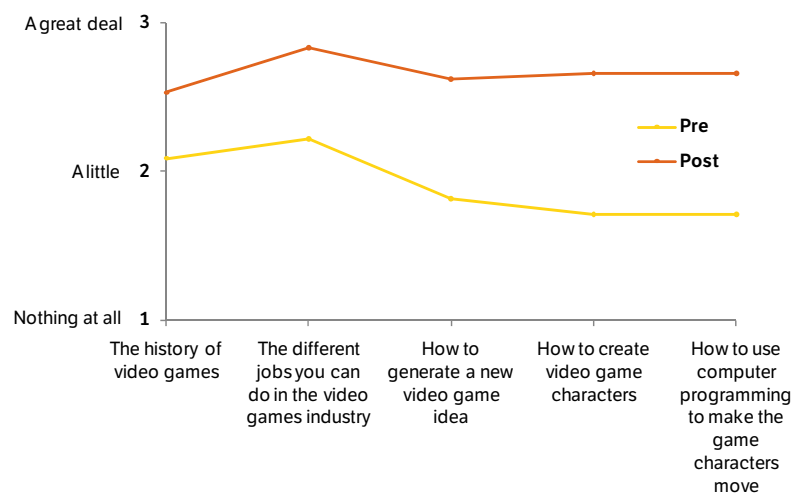
Source: BOP Consulting (2011)

One possible explanation for the higher levels of agreement among volunteers and temporary staff is likely to be their overall longer and deeper engagement with the Festivals compared to the mostly short engagement period of Festival audiences. However, the Festivals do offer opportunities for more sustained participation, particularly through their workshop and outreach programmes. For instance, this year's Edinburgh International Science Festival offered two workshops (each lasting for two days) for teenagers. During the course of these two days,

²¹ 85% of both groups disagreed or strongly disagreed that the Festival had 'made no difference' to their knowledge and understanding'.

the young people covered theoretical areas such as the history of video games but – in the main – learned how to create a video game. As part of an additional piece of research that was carried out at the Science Festival, the young people at these two workshops were asked about their knowledge and skills around video games at the beginning and again at the end of the workshop period. Figure 15 below shows the knowledge gains that the young people made within the space of these two days. Workshops at other Festivals are likely to produce similar results.

Figure 15 Increase in knowledge and understanding at Video Games Workshop of the Science Festival, pre and post workshop survey 2010



Source: BOP Consulting (2011)

4.2.2 Improving personal development and 'non-cognitive' skills

There is also some evidence that demonstrates that cultural activities contribute to a range of what can be described as 'non-cognitive' or 'life skills' for children and young people. Such non-cognitive skills include creativity, communication skills, self confidence, self awareness, decision-making capabilities and other aspects of personal development.²²

In order to test the extent to which the Edinburgh Festivals contribute to these outcomes, we asked parents and teachers whether the Festival had any effect on the following two areas: children's creativity and their imagination. While the latter primarily refers to the child's ability to form mental images, sensations or concepts (e.g. to spin a fairy tale or a fantasy), the former also includes more practical, hands-on creative abilities of a child (e.g. to perform a movement or to do a crafts activity).

The majority of parents and teachers felt that the Festival events had contributed to children becoming more creative. Interpreting the negatively phrased statement²³, 62% and 69% respectively felt that the event had made a difference to the children's creativity, while a significant proportion of them were undecided (23% and 21% respectively). With regard to children's imagination, 93% of the parents agreed that the event had increased children's imagination. Teachers overall agreed in equal measures. It is worth noting that while the overall level of agreement with this statement is the same for parents and teachers at the Imagine Festival, there is a considerably higher proportion of them strongly agreeing that the Festival has stimulated their children's imagination: 62% of parents strongly agreed (vs. 50% across all Festivals) and 63% of teachers (vs. 48% across all Festivals). This finding is probably not surprising given that taking children and

²² BOP Consulting (2006) and CASE (2010)

²³ 62% and 69% respectively disagreed or strongly disagreed with the statement that the event had 'made no difference' to the children's creativity

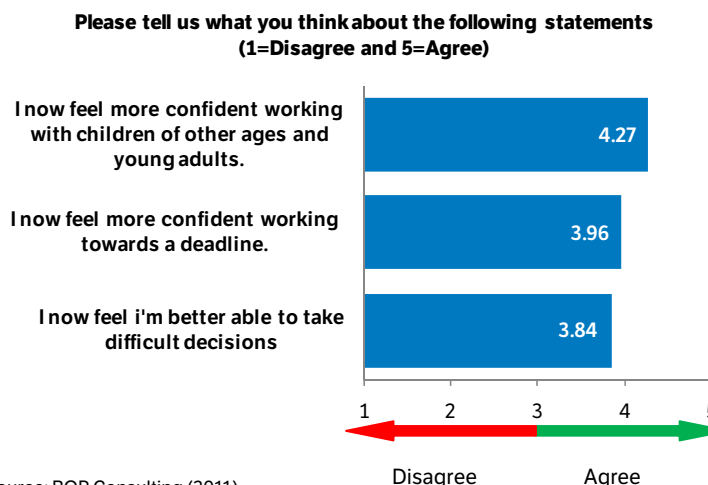
young people on a 'voyage into the imagination' is at the heart of the Festival.

The final two indicators that were asked of all teachers looked at the Festivals' impact on children's motivation and social attitudes. Just over half (52%) of the teachers, agreed or strongly agreed that attending the events had increased children's engagement with school learning (with another 37% who had no opinion). When asked about the effect of the children's visit on their peer relationships, interpreting the negatively phrased statement²⁴, just under a third (31%) felt that the event had made a difference, though the most common response was neutral (49%).

These results suggest that, while there is some evidence of impact on such social attitudes and behaviours, this is not particularly strong. Again, this is maybe not surprising given the short period of engagement with the Festivals during the actual Festival time (which was considered as part of this study). Indeed, research suggests that 'longer lasting benefits, such as developing the personal skills needed for behavioural change, seem to require some level of sustained involvement.'²⁵

The results from the Science Festival Video Games workshop seem to confirm this hypothesis with regards to a number of social and 'non-cognitive' skill areas, as show in Figure 16. With regard to the activity's effect on social interactions, 82% of the young people agreed that they felt 'more confident working with children of other ages and young adults' at the end of the workshop. The workshop also had very positive impacts on other non-cognitive skills, in particular those which will be useful for their future employment and/or education: 73% of the young people agreed that they were more 'confident working towards a deadline' and two thirds agreed that they were 'better able to take difficult decisions' post-involvement. Finally, 64% stated that they would be 'better at problem-solving' as a result of their workshop participation.

Figure 16 Science Festival Video Games workshop's effects on young people's non-cognitive skills, post workshop survey 2010



Source: BOP Consulting (2011)

Summary and conclusions

Audiences' increased enjoyment of the event – and of the cultural form or subject – translates into learning benefits for a large part of the audience. This learning includes a better understanding of the cultural form itself, and of wider environmental or social issues covered through the Festival activities. Some of the Festivals also provide activities for the formal education sector. Teachers perceive these as a value-added enrichment to the curriculum, rather than a major contributor to core subject learning.

In line with this, the Festivals have very positive effects on children's personal development, in particular their imagination and creativity. The Festivals do not have any major influence on pupils' attitudes to school learning and peer relationships. This is perhaps not surprising, considering that most Festivals' activities for the formal education sector during the Festival time only offer a very short engagement period. This is also true for audience engagement at Festival events more generally. However, many Festivals do offer

²⁴ 31% disagreed or strongly disagreed that the event had 'made no difference'

²⁵ Stanley, J et al, (2004)

education activities outside the Festival time and these offer greater scope for deeper engagement.

The brevity of the interaction is likely to be a key reason why the Festivals' impacts on increasing knowledge and learning, albeit positive, are perhaps not as high as expected (compared to other cultural sector research). Another explanatory factor may be that the Festivals' audiences are already sophisticated and knowledgeable cultural consumers, so the degree to which the Festivals are able to contribute to further improvements in their understanding or knowledge of the cultural form or subject matter itself, may be limited. Having said this, the Festivals do provide some forms of deeper engagement during the Festival period – for volunteers, temporary staff and some workshop participants – and these groups do indeed show strong learning impacts in the subject area and the cultural form.

4.3 Cultural impact: Developing the creative, cultural and events industries in Edinburgh and Scotland

Over and above the direct cultural and learning effects that the Festivals have on their public audiences, they also have a bearing on the development of the creative, cultural and events sector in Edinburgh and Scotland more widely. These outcomes are described in more detail below.

4.3.1 Professional development for participating artists/companies

The study wanted to explore the learning outcomes of professionals who attend the Festival, be it performers and artists, or delegates attending the Festival in a professional capacity.

Three quarters of all the Festivals provided dedicated industry sessions: in total 287. These sessions included a range of different aspects such as professional development (139), training (39), networking (77), media meets (11) and other sessions (21). There were 6,273 participants at these sessions in total.

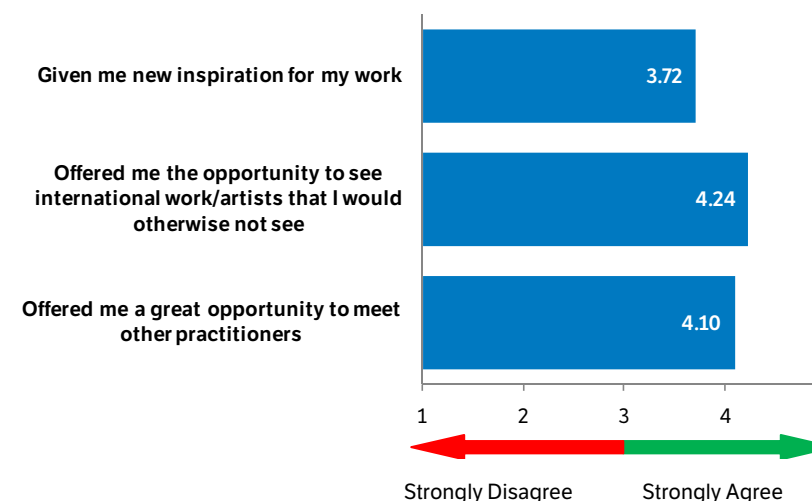
The first question was therefore about performers' and delegates' skills development. Interpreting the negatively phrased statement,²⁶ 70% felt that the Festival had made a difference to their or their company members' professional skills, knowledge and understanding. Only 10% felt that they had not developed any skills or knowledge and 18% were undecided. One of the ways that performers and delegates are able to develop such skills is by seeing international work that they would otherwise not see: 40% agreed and 44% strongly agreed with this statement. We asked a slightly different question at the Edinburgh International Film Festival: 78% of the delegates agreed or strongly

²⁶ 25% strongly disagreed and another 45% disagreed that the Festival had 'made no difference to their/company members' professional skills, knowledge and understanding'

agreed that they were able to see high quality work that is otherwise not accessible.

While these initial questions mainly looked at cognitive skills and knowledge acquisition, the following one focused on a more non-cognitive area, i.e. new inspiration for their artistic endeavours. While the evidence is not as strong as for the previous categories, still six out of 10 performers and delegates agreed (including 24% who strongly agreed) that attending the Festival had 'given [them] new inspiration for [their] work.'

Figure 17. Performers'/delegates' professional development outcomes (1=strongly disagree, 5=strongly agree), 2010



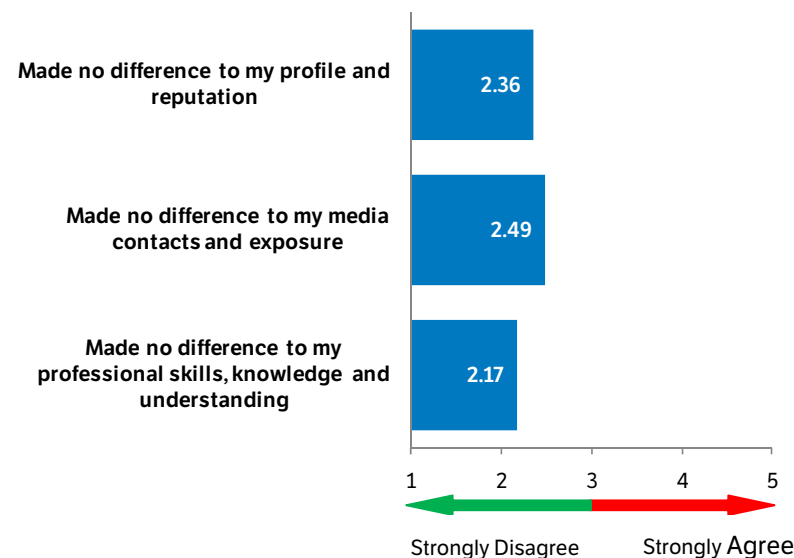
Source: BOP Consulting (2011)

Increasing knowledge and skills is, however, not the only way in which performers benefit. The Festivals also provide opportunities for performers and delegates to improve their professional networks – with other colleagues or with media contacts (e.g. the Edinburgh Festival Fringe runs a media/performers hub during the course of the Festivals which operates as a meeting point for artists and media representatives).

The suggestion that the Festivals are used to make or maintain relations with peers is strongly supported by the research evidence: 79% of performers agreed or strongly agreed that the Festival event has 'offered [them] a great opportunity to meet other practitioners or artists'. In addition, 71% of delegates at the Edinburgh Festival Fringe and the Edinburgh International Film Festival stated that they had increased their contact with other industry professionals, with another 22% neither agreeing nor disagreeing.

While the results are less strong than for peer relationships, the Edinburgh Festivals also provide a platform for performers to increase their media networks and attention. Interpreting the negatively phrased statement,²⁷ just over half (55%) of performers and delegates felt that the Festivals had made a difference to their media exposure and contacts. Around a quarter were undecided. A slightly different question was asked in the case of the Edinburgh International Film Festival (focusing purely on contacts rather than on media attention and engagement more broadly), but similarly, interpreting the negatively phrased statement,²⁸ 54% felt that the Festival had made a difference to the 'contacts [they] have with the media'.

Figure 18 Performers'/delegates' skills development and media profile outcomes (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

We then asked whether performers and delegates had felt that the Festivals had an impact on their professional profile and reputation as a result of participating. The results were more positive: interpreting the negatively phrased statement,²⁹ 63% felt that the Festival had made a difference to their 'profile and reputation', while 22% were unsure.

Both skills and network development have a potential bearing on career development beyond the Festival period. Therefore, we finally asked performers and delegates whether they anticipated their attendance to provide further sales leads or to result in new work. Overall, the responses are positively forward-looking: the most common response (39%) was that the performers and delegates were 'confident', with a further quarter that was 'very confident', that their attendance will translate into future work and sales (28% were neither confident nor unconfident).

²⁷ 55% of performers and delegates disagreed with the statement that the Festivals had 'made no difference to their media exposure and contacts.

²⁸ 54% disagreed with the statement that the Festival had 'made no difference to the contacts [they] have with the media', while more than a quarter agreed (28%)

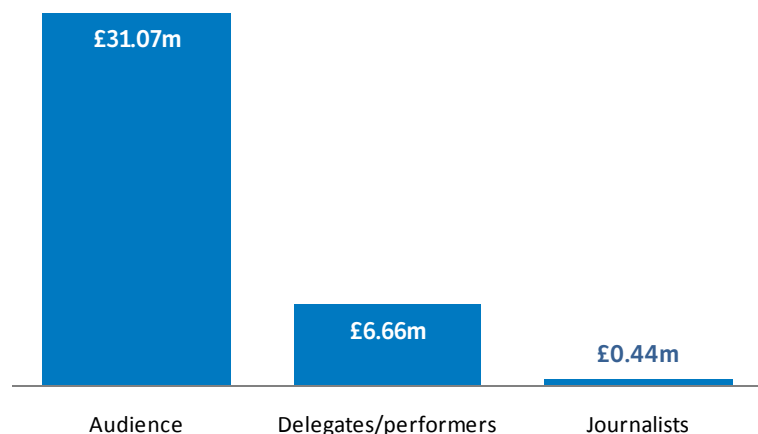
²⁹ 63% disagreed (including 21% who strongly disagreed) with the statement that the Festival had 'made no difference to [their] profile and reputation'

4.3.2 Supporting Edinburgh's venue infrastructure

Festival venues in Edinburgh benefit in a number of ways from the Festivals (e.g. marketing/branding outcomes). The most direct way in which they benefit, and the indicator which has been included in the study, is the financial revenue that they generate during the Festival period.

The total gross expenditure made at the Festival venues during the Festival period is just over £38m. This accounts for approximately 15% of all gross expenditure made by Festival visitors. As shown in Figure 19, audiences make most of this expenditure (81%) as compared with performers, delegates and journalists.

Figure 19 Gross visitor expenditure made at the Festival venues, by visitor segments, 2010



Source: BOP Consulting (2011)

Clearly, it must be recognised that not all of this income is additional, i.e. a proportion of this revenue would have been generated even without the Festivals taking place (for further discussion of the additionality of this expenditure see section 5.6).

4.3.3 Supporting the Scottish culture sector in the wider world

In addition to the Festival venues in Edinburgh, the Scottish cultural sector benefits from the Festivals in terms of developing its capacity and professional artist sector.

The Edinburgh Festivals support Scottish performers and artists through the payment of artist and speaker fees to a significant degree (the only exception being the Edinburgh Festival Fringe which does not pay any fees to performers directly and is therefore not included in the figures below). In total, the eleven Festivals that did pay performers and speakers spent approximately £900,000 on performers from Edinburgh or elsewhere in Scotland. This corresponds to 24% of their total expenditure on artists' fees. However, it should be noted that this overall percentage is heavily influenced by the Edinburgh International Festival's expenditure on overseas artists (which lies at the core of their mission). If this Festival was discounted from the figures, the proportion of artists' fees expenditure on Scottish artists out of the total would go up to 50% for the remaining ten Festivals.

As well as presenting and creating work for Scottish artists, the Festival organisers train and employ a workforce of temporary staff and volunteers – which can be considered as a resource for the Scottish events sector more generally, in that a greater number of trained staff is available for hosting other large scale events within the country (such as the forthcoming Commonwealth Games in 2014).

Three quarters of the Festivals work with volunteers, which in 2010 translated into 614 volunteer opportunities. In total, these 614 volunteers contributed 26,919 hours of volunteer time, an average per volunteer of over 43 hours. In order to contextualise these figures it is interesting to compare these to other events and cultural heritage volunteering research. A research study for Museums Galleries Scotland found that volunteers across 57 museums contributed approximately 21,156 hours per month in high season and 16,581 hours per month in low season.³⁰ These volunteer hours are also contributed by a larger

³⁰ Baird L M (2009) *Volunteering in Museums. A research study into volunteering in Museums. Full report*, for Museums Galleries Scotland

number of volunteers.³¹ The Edinburgh Festival volunteers are also more intensely engaged than volunteers in other large-scale events. For instance, the European Capital of Culture programme Liverpool 08 involved a total of 1,000 volunteers from the start of the volunteering programme in 2005 until January 2009.³² During this approximately four year period, these volunteers contributed 6974 volunteer days (equivalent to 52,305 hours).³³ The average number of hours per volunteer is then 52 hours – but again, this is over a period of almost four years.

In addition, all of the Festivals work with temporary staff: a total of 402 full-time equivalent temporary staff was employed directly by the Festivals. Based on the information that temporary staff provided in the surveys, they worked on average 308 hours, equating to a total of 124,119 hours across all the Festivals.

Of course, not all of these volunteers and temporary staff are permanently based in Edinburgh or elsewhere in Scotland. While not all the Festivals were able to provide information on their residence, across the Festivals there were at least 912 volunteers and temporary staff who are based in Scotland. We also surveyed volunteers and temporary staff and of those volunteers surveyed, approximately half (53%) said that they had received formal training as part of their volunteering engagement with the Festivals, while two thirds (67%) of temporary staff said so.

4.3.4 Summary and conclusions

Aside from events for the public, the Festivals also promote, develop and support the cultural, creative and events sector in Edinburgh, Scotland and beyond. Most obviously, the Festivals make an important economic contribution to the range of cultural venues that are involved in hosting the Festivals throughout the year. The Festivals also contribute to the professional development of performers and artists. Simply taking part in the Festivals increases artists' reputations and provides them with inspiration for new work as well as the prospect of follow-on sales and new commissions.

The Festivals are also proactive in supporting performers and companies. This includes directly spending a significant proportion of their budget on artists based in Scotland and also by providing tailored delegate programmes that increase practitioners' knowledge and skills, and widen and deepen their peer networks.

The Festivals help to build capacity for the sector long-term. Volunteers and temporary staff who are working with the Festivals are more intensely engaged than in, for instance, the Scottish museums sector (in terms of the average number of hours contributed per volunteer). This wealth of experience constitutes a resource for the sector when looking ahead towards other large scale events such as the Glasgow Commonwealth Games in 2014.

³¹ From the data available, it is not possible to calculate the exact number of volunteers involved in the 57 museums who provided data on volunteer hours. However, the report states that across the entire sample of 87 museums, a total of 2,515 volunteers were involved, an average of 29 volunteers per organisation. If one was to assume that the 57 museums providing data on volunteer hours involved an average number of volunteers, the total number of volunteers in these museums would be 1,648. The average number of monthly hours per volunteer would then be 13 hours per month/volunteer in high season and 10 hours per month/volunteer in low season.

³² Impacts 08 (2010) *Volunteering for Culture*

³³ This is based on an average day of 7.5 hours.

5. Wider Festival outcomes

This section presents the findings from the assessment of the wider Festival outcomes. These are made possible through the successful attainment of the core Festival outcomes. The wider outcomes cover a greater breadth of outcome areas than the core Festival outcomes – which primarily fall under the categories of culture and learning, and some direct economic benefits – to include the whole range of outcomes that were assessed through the evaluation framework, i.e. cultural, social, marketing/media, indirect economic and environmental outcomes.

5.1 Cultural impact: Develop audiences for culture

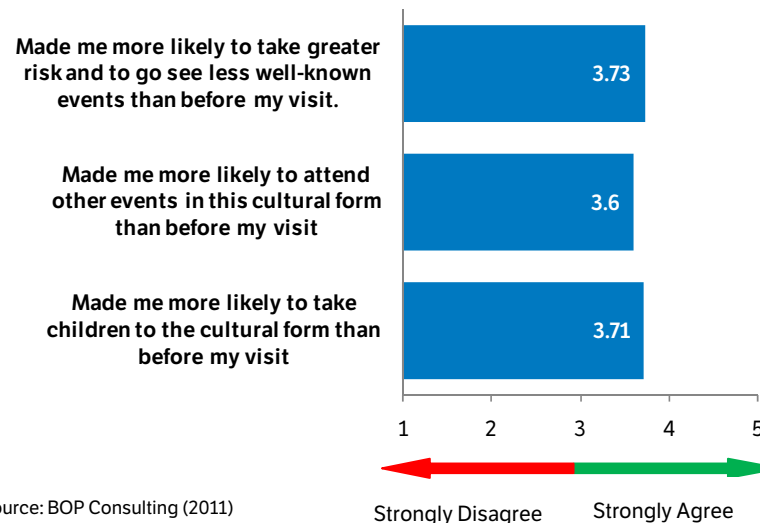
Over and above the Festivals' direct bearing on Edinburgh's cultural sector during the Festival period, the study interrogates whether they also have an impact on Edinburgh's cultural sector outside this period. While it is undisputed that the Festivals attract large numbers of audiences – both locals and non-locals – during the busy summer period, it could be argued that this has a potential negative effect on attendances and visits year-round. According to this line of thought, audiences are only willing and (due to financial and time commitments) able to engage in a certain number of cultural activities throughout the year. By attending more frequently during the Festival period, audiences are then less likely to attend throughout the rest of the year (in this scenario).

There is, however, a counter argument that suggests that the Festivals act as a stimulus and driver for increased attendances throughout the rest of the year. By providing events of high quality – and in large numbers – the Festivals are able to attract audiences who otherwise might not have engaged in any cultural activities. A positive

experience at a Festival event may then lead to audiences attending similar cultural events again. Hence the Festivals can be considered to help build future audiences for Edinburgh's cultural sector.

The first indicator which we tested through the research was audiences' likelihood to come back to the Festival itself the following year and almost two thirds (64%) stated their intention to come back to next year's Festival. Even more positively, 96% of teachers said that they would participate again in the Festival next year.

Figure 20. Festivals' impact on future attendance at cultural form (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

We then asked audiences whether the Festival had any effect on their likelihood to attend other cultural activities throughout the rest of the year. More than half (55%) of the audiences agreed with the statement that their Festival experience had 'made them more likely to attend other events in this cultural form than before [their] visit' (including 19% who strongly agreed). One third neither agreed nor disagreed.

We also asked parents and teachers whether they were more likely to take children along to similar cultural events as a result of their Festival visit. Two thirds of parents agreed (including 27% who strongly agreed) that their attendance at this year's Festival had made them more

likely to take children to the cultural form than before. Similarly, 71% of teachers agreed or strongly agreed with this statement.

Other than simply attending similar events to the one experienced at the Festival, we also tested whether the fact that the Festivals offer innovative and distinctive programming had a bearing on audiences being subsequently more experimental in their cultural choices. Audiences were asked whether their Festival experience had made them more likely to take greater risks and attend less well-known performances, films or artists than before. Indeed, almost two thirds (64%) agree with this statement (including 20% strongly agree) and 26% who neither agreed nor disagreed.

5.1.1 Summary and conclusions

The study shows that the Festivals have an impact on cultural participation more widely, in particular on audiences' year-round attendance. For instance, there is evidence that:

- The Festivals are a stimulus to further attendance at similar cultural events subsequently.
- Audiences are more likely to take their children to similar cultural events as a result of their Festival experience.
- Audiences are more likely to take greater risks in their cultural choices and explore new cultural experiences as a result of their Festival-going.

These findings counter the idea that the Festivals are having a negative impact on wider cultural participation. On the contrary, the Festivals can be considered to help build future audiences for Edinburgh's cultural sector.

5.2 Placemaking and media impact: Enhance the identity and image of Edinburgh and Scotland

As argued in the *Thundering Hooves* report, Festivals are one of the ways in which cities distinguish themselves and 'move from commodity to brand, in order to attract and retain inward investment, tourism and a skilled work-force [...] and in certain cities also [achieve] softer social inclusion and education objectives.'³⁴ This means that Festivals are seen as a catalyst for branding and image-making, which then leads to a wider set of positive economic or social outcomes. This section describes the extent to which the Festivals contribute to enhancing the perception and image of Edinburgh and Scotland more widely.

5.2.1 Greater pride in the local area

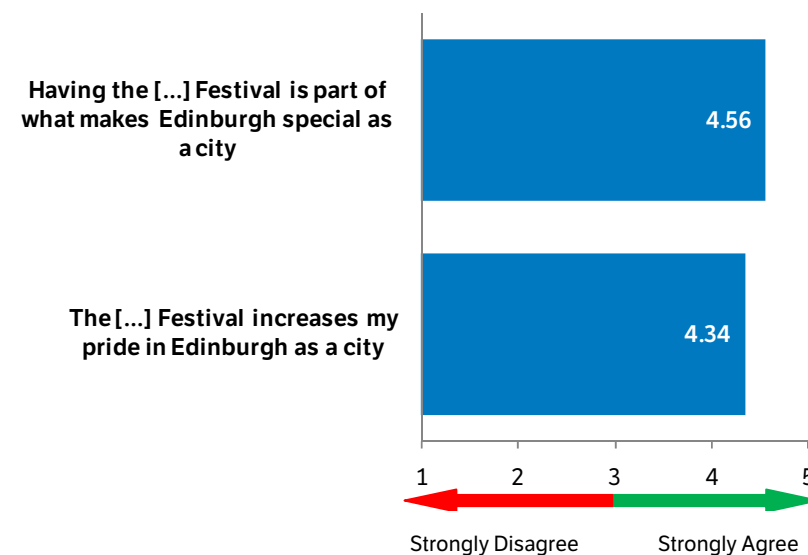
The first set of outcomes in this section relates to locals' perception of their city: the degree to which the Festivals increase residents' feeling of local pride, and whether or not they consider the Festivals help make Edinburgh 'special'.

The image that residents have of the place in which they live is important for a number of reasons. A positive image may contribute to retaining the skilled workforce already residing in the city. Also, local pride and appreciation of the area are closely linked to feelings of attachment and a sense of belonging – both of which are seen by policymakers as a key indicator of community cohesion. In other words, the more people feel a sense of belonging within a community, the more likely the community is to act collaboratively to maintain and improve the area. In turn, this is likely to lead to a greater enjoyment of residents living in the area and of feeling safe to do so.

The figures from the survey are very convincing in this respect: 89% of all local audiences surveyed agreed that the Festivals increase their pride in Edinburgh as a city, including almost half (48%) who strongly agreed.

There is even stronger support of the following statement: 94% agreed (including 63% who strongly agreed) that the Festival is part of what makes Edinburgh special as a city.

Figure 21. Local audiences' feeling of pride in the local area (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

These results exceed what is known from research on other cultural and heritage activities, even where improving local pride and perceptions is a major aim of the activities. This is the case, for instance, for the Heritage Open Days programme run every year in England. The 2010 research found that 86% of local visitors overall agreed with the statement that the event had made them 'feel more proud of [their] local area'; however, only 35% strongly agreed.³⁵

³⁴ AEA Consulting (2006)

³⁵ Heritage Open Days (2010) *Report 2010. Facts, figures, feedback*, available at https://www.heritageopendays.org.uk/documents/HODs_report_2010_Final.pdf

5.2.2 Enhanced image of Edinburgh as a visitor destination

Attracting tourists from outside of Edinburgh is another key motivation for branding the city. As described in section 5.6, non-local, staying visitors are responsible for the biggest economic impact generated through the Festivals. Ensuring that those external visitors have a positive perception of Edinburgh as a place to visit is thus an important factor in producing such economic benefits.

Audiences from outside Edinburgh and Scotland

Within the research, we analysed the data in terms of two different external audiences: firstly, all visitors from outside Edinburgh (this group would include visitors who are resident in other parts of Scotland) and secondly, only those visitors from outside of Scotland (who make up the large proportion of staying visitors).

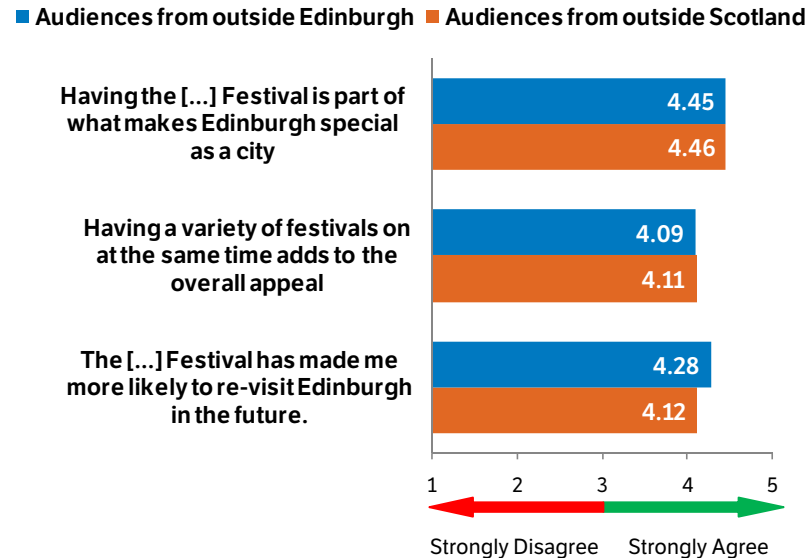
The first question we asked external visitors was the same as that which we asked of locals: whether the Festivals make Edinburgh a distinctive place. Similar to the positive responses from local audiences, visitors to the city equally strongly value the role of the Festivals: 93% of all non-local visitors agreed (including 53% who strongly agreed) that the Festival is part of what makes Edinburgh special as a city. When looking at only those visitors from outside of Scotland, again 93% of them agreed with the statement (and 54% strongly agreed).

One of the aspects that has contributed to Edinburgh’s existing reputation as ‘a Festival city’ is the number of Festivals taking place in parallel during the summer period which is unrivalled on the global stage. As in the SQW research in 2004/05, we therefore asked visitors to the summer Festivals whether having multiple Festivals running at the same time made them a more attractive proposition to attend.

As in the SQW research, our results strongly support the argument that visitors appreciate the multiple Festival offer: 78% of all external visitors agreed (including 37% who strongly agreed) that ‘having a variety of Festivals on at the same time adds to the overall appeal’ and that the seven Festivals running during the same period is an additional convincing argument for visiting Edinburgh. The same

proportion overall (78%) of non-Scottish visitors agreed with this statement (including 39% who strongly agreed).

Figure 22. Edinburgh’s perception by audiences from outside Edinburgh and Scotland (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

The next indicator in this section looks at whether this appreciation of the Festivals and the experience in Edinburgh also translates into an intention to return to Edinburgh at another time. This is the case, with 82% of visitors from outside Edinburgh agreeing (including 51% who strongly agreed) that the Festival has made them more likely to re-visit Edinburgh in the future. For visitors from outside Scotland, more than three quarters (77%) said that they were more likely to come back because of their Festival experience.

The latter figure is particularly noteworthy. Non-Scottish visitors are particularly important for generating economic benefits to Edinburgh (and wider Scotland) as they are the group most likely to stay overnight and to stay for a longer period of time. In addition, those from outside Scotland also have the furthest to travel to Edinburgh and it requires greater effort and cost (including in many cases a plane journey) for

them to return to the Festivals than visitors who live within Scotland. Therefore, having this group stating that the Festivals have increased their intention to re-visit the city is a very positive finding. Moreover, based on the research we can be reasonably confident that this intention will indeed translate into future visits. 44% of non-Scottish audiences had attended the Festival before and many had done so for several years: on average, they had attended 4.5 years prior to this year's event.

These findings already suggest that the Festivals act as a draw for external visitors to come to Edinburgh and Scotland more widely. This is further supported by other data from the research. We asked non-local visitors (who had stayed overnight in Edinburgh and also spent at least one night elsewhere in Scotland) how important the Festivals were in their decision to visit Scotland: 82% of these respondents stated that the Edinburgh Festivals were either 'their sole reason' (33%) or 'a very important reason' (33%), with a further 16% stating that they were 'a fairly important reason' to visit Scotland. This clearly shows that the Festivals are a key motivation for visitors to come not only to Edinburgh, but also to Scotland – thus suggesting that the Festivals are of great importance to the wider Scottish tourist economy.

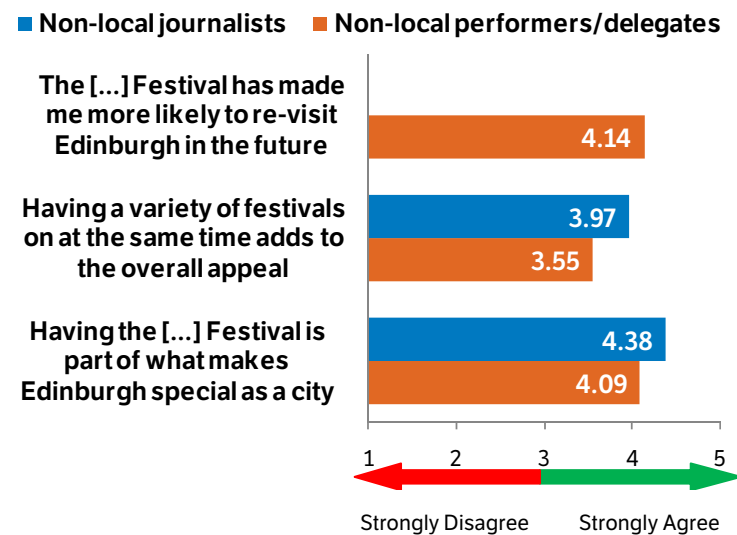
Non-local performers and journalists

In addition to looking at audiences, we also asked non-local performers and journalists about their perception of Edinburgh and the impact that the Festivals have on this. Firstly, non-local journalists were asked whether they felt that the Festival makes Edinburgh special as a city. As with audiences, non-local journalists strongly shared this view: 88% agreed (including 52% who strongly agreed) with this statement about the Festivals making Edinburgh distinctive.

We then asked performers, delegates and journalists attending the summer Festivals whether having multiple Festivals running at the same time made them a more attractive proposition to attend. While the co-existence of several Festivals was a strong pull for audiences, this is less of a factor for performers (most of whom only perform at one Festival). Just under half (49%) agreed or strongly agreed with the statement that the Festival had added appeal due to the number of

concurrent Festivals, while 40% are undecided. However, 77% of journalists agreed (including 27% who strongly agreed), with another 17% stating that they neither agreed nor disagreed. Again, this is not surprising as – unlike the performers – journalists cover events across the range of summer Festivals.

Figure 23 Edinburgh's perception by delegates/performers and journalists (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

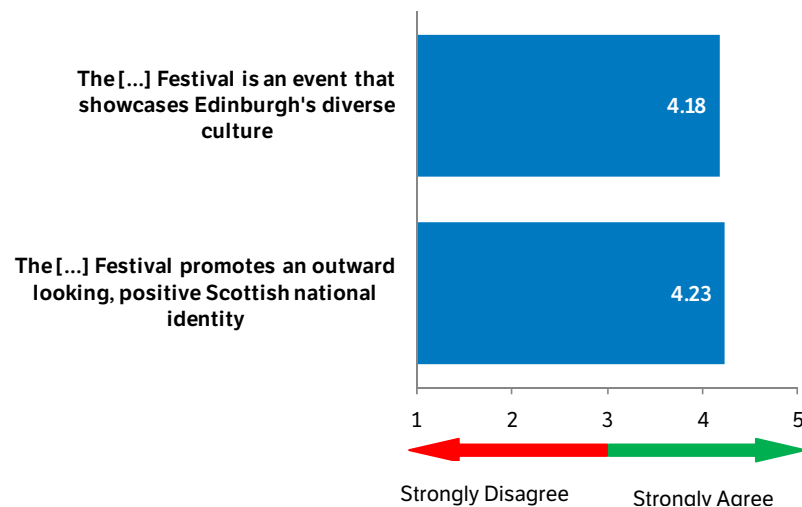
Finally, we asked performers, delegates and journalists whether a positive experience of the Festivals translates into the intention to re-visit, including outside of their professional remit. The results strongly confirm this hypothesis as 77% of performers and delegates agreed (including 39% who strongly agreed) that their visit has made them more likely to re-visit Edinburgh (another 22% were undecided). Even more positively, 86% of journalists attending in the summer strongly agreed (58%) or agreed (28%) that attending the Festivals had made them more likely to re-visit Edinburgh in the future.

5.2.3 Promotes an outward looking, positive Scottish national identity to visitors

More than just portraying an image of Edinburgh, the Festivals also have a role to play in the way Scotland is perceived, especially by visitors from the rest of the UK and overseas. While none of the Festivals have an exclusively ‘Scottish’ mission, many of the Festivals include elements of Scottish heritage and programming (e.g. the Lone Piper at the Royal Edinburgh Military Tattoo, or the inclusion of a significant proportion of Scottish artists at the Edinburgh Jazz and Blues Festival or the Imagine Festival). At the same time, the Festivals attribute great importance to attracting international audiences and showcasing international work. Therefore, the image that is to be portrayed through the Festivals should be one of openness.

The research included two indicators relating to this outcome. Firstly, audiences were asked whether the Festivals promoted an outward looking, positive Scottish national identity. The results show a high level of support for this statement: 85% agreed (including 41% who strongly agreed). Out of the remaining respondents, only 3% disagreed.

Figure 24. Audiences’ perception of Edinburgh’s and Scottish cultural identity (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

Secondly, we also tested whether audiences were aware of the diverse range of cultural influences and experiences that Edinburgh has to offer through the Festivals. Again, responses are overall very positive: 85% agreed (including 38% who strongly agreed) that the Festival is an event that showcases Edinburgh's diverse culture.

5.2.4 Generates (inter)national media profile

In addition to the event experience that audiences have while attending the Festivals, a key factor in attracting tourists to Edinburgh and Scotland is its media profile. At a basic level, generating media attention *per se* is crucial for attracting visitors to the city. As the *Thundering Hooves* report states:

“In a ‘winner takes all’ situation, in which national and international press tend to have a limited attention span; and in which mobile, discriminating and informed audiences are interested in winners rather than the second placed, there is no stable equilibrium of ‘eminence’ between the status of pre-eminence that Edinburgh enjoys and that of being lost in the crowd of ‘also-rans’.”³⁶

Over and above having a media profile, it is therefore even more important whether this media attention is positive or negative.

Monitoring the media profile of the Festivals (or of any organisation) is a huge and time-consuming task in itself. A few of the larger Festivals have a system in place to track (and in some cases rate) news items that appear in the print media. However, given the considerable resource implications of such press and media monitoring, it was impossible to implement a similar data collection process across all the Festivals in the study.

However, since the start of 2010, all of the Festivals have started using Meltwater News. This is an online media monitoring service which tracks 130,000 online news sources. It covers news sources globally (covering 190 countries and 100 languages) which can be searched for key words. While Meltwater News does not include offline news items, it

³⁶ AEA Consulting (2006)

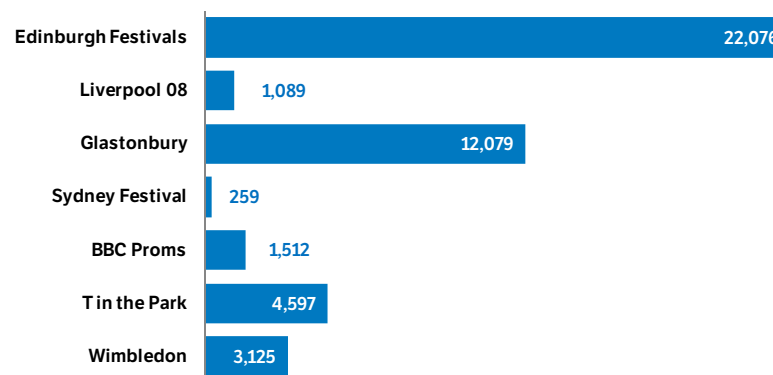
does capture articles that appear in the online editions of traditional media outlets (e.g. the online version of the Scotsman print edition). A slight disadvantage of focussing on online media monitoring is that there is no function within Meltwater News that can distinguish between press coverage at local vs. national or international level (given that it monitors online news items which are accessible worldwide). Nevertheless, it was agreed that media monitoring of the Festivals through Meltwater News was the most comprehensive tool that could be used within the resources of the research, and would therefore constitute the building block of the study's media impact assessment.

Figure 26 below shows the overview of press coverage of the individual Festivals during 2010. The data was collected for the period of 1 January to 31 December 2010.³⁷ The search terms used were the official Festival title (e.g. Scottish International Storytelling Festival) and the shortened/common version of the Festival title (e.g. Edinburgh Storytelling Festival). For a full list of search terms, see Appendix 9.2. In total, 22,076 press articles referred to the Edinburgh Festivals. Meltwater News is also able to give an indication of the potential number of viewings of these articles, which is based on the average viewership of the online source on which the article appears. Using these figures, there could be potentially more than 30.1 billion viewings of articles about the Edinburgh Festivals.

To put these figures into context, we ran a small number of comparator searches. Liverpool 08, the European Capital of Culture programme, is perhaps the most comparable as – like the Edinburgh Festivals – it provided a year-round cultural events programme. For the period of 1 January to 31 December 2008 (the programme year), Meltwater News reported 1,089 articles with potential viewings of 850 million.³⁸ We also looked at a number of other major cultural and

sporting events and the Edinburgh Festivals have generated more news articles than any of them (see Figure 25). Moreover, the articles reporting on the Edinburgh Festivals do report the highest number of potential viewership of all events that we looked at.

Figure 25. Number of news items for Edinburgh Festivals and comparator events, 2010



Source: Meltwater News/BOP Consulting (2011)

It should also be noted that the Meltwater News figures do not include broadcast media coverage (unless a broadcast feature receives an online write up), which are significant for many Festivals. For instance, the fireworks from Edinburgh's Hogmanay are broadcast in New Year's television news editions virtually all around the world. Another example is the international syndication of the Royal Edinburgh Military Tattoo. The Festival estimates that the cumulative international audience watching the annual highlights is about 100 million people.

³⁷ Meltwater News data for Edinburgh's Hogmanay collected from 4th January 2010 to 4th of January 2011.

³⁸ It should be noted that a separate large media impact evaluation was carried out for Liverpool 08. This used the quantitative business information resource Lexis Nexis, which records approximately 2,000 global newspapers, 750 newswires and 7,000 licensed newsletters, journals and industry titles. Using the tool, the media impact evaluation estimates that there were 547 search results for Liverpool ECoC in national papers (in 2008) and 3,653 in local papers (in 2008). The figures for those news items referring to 'Liverpool' as a generic term are significantly higher (3,605 in national and 9,810 in local papers in

Figure 26. Meltwater News press monitoring 2010/11

Festival	Total no. of articles during 2010	Total no. of articles during 2010 with known readership	Total potential readership
Edinburgh Festival (generic search term)	5,305	4,822	7,658,900,801
Edinburgh International Science Festival	275	250	274,141,976
Imaginate Festival	44	12	2,507,470
Edinburgh International Film Festival	2,698	2,432	5,868,663,245
Edinburgh Jazz and Blues Festival	132	128	107,343,830
Edinburgh Art Festival	190	173	297,747,917
Royal Edinburgh Military Tattoo	938	802	791,101,116
Edinburgh International Festival	1,952	1,779	2,771,400,921
Edinburgh Festival Fringe	8,695	7,895	9,822,545,120
Edinburgh Mela	94	84	116,537,615
Edinburgh International Book Festival	1,107	995	1,676,455,775
Scottish Storytelling Festival	21	17	12,654,951
Edinburgh's Hogmanay	625	553	668,918,347
Total	22,076	19,942	30,068,919,084

Source: BOP Consulting (2011)

Social Media

While news reporting in the more traditional form of press articles or broadcasting constitutes a major part of the opinion forming process, recent years have seen an explosion of social media. An evaluation of the online social media activity surrounding the Liverpool08 programme, argues that online platforms like Facebook, Twitter or YouTube 'have the potential to reflect both broader media perspectives and the views of people on the street' but also affect the way people engage with major events.³⁹ Attempting to monitor all social media activity related to the Edinburgh Festivals is difficult; however we felt that it was important to give a sense of this media activity. We therefore asked delegates, performers and journalists whether or not they used social media and if so, what was the overall tone of the messages conveyed.

Just under half of the delegates and performers (48%) said that they had shared their Festival experiences via social media. This compares to almost two thirds (65%) of the attending journalists. Of those who did use social media, the most frequently used social media tool was Facebook (used by 49% of performers/delegates and 39% of journalists), followed by people's own blog (23% and 27% respectively) and Twitter (17% and 25% respectively). Only a minority of both groups used Flickr to share their experiences (1% and 4%).

When asking about the tone of the messages shared, there was a strong positive response: 88% of journalists, and the same proportion of performers and delegates, said that the messages they shared via social media were 'mainly positive'.

5.2.5 Summary and conclusions

One of the most striking findings from the research is the strong and positive impact that the Festivals have on the way the City of Edinburgh and Scotland are perceived, by locals and external visitors alike. While it might be expected that attendees have a positive attitude towards the

Festivals, the results exceed what is known from research on other cultural and heritage activities (including where improving local pride and perceptions have been a major aim of the activities). Our results show that:

- Local residents take great pride in the Festivals and the value they provide to Edinburgh as a city.
- Visitors believe that the Festivals make the city distinctive; they highly value the experience of having multiple Festivals running simultaneously during the summer period, and are more likely to re-visit as a result of attending the Festivals (thus ensuring the continued contribution to Edinburgh's visitor economy).
- The image that the Festivals present of Edinburgh and Scotland is one of diversity and openness; showcasing a positive national identity.

The media attention that the Festivals generate (as recorded through the online monitoring service Meltwater News) is also very significant, and it exceeds that of other comparable events. The data recorded by the online news monitoring tool used in the study does not allow any conclusions to be drawn as to whether this media attention is positive or negative. However, the social media activity generated by the attending journalists has been assessed and it is largely favourable. This suggests that the ultimate media messages that are networked and syndicated from the attending journalists are predominantly favourable.

³⁹Miah, A. and Adi, A. (2009) *Liverpool 08. Centre of the Online Universe*, Report commissioned by Liverpool City Council for Impacts08 Research Programme

5.3 Social impact: Support cultural diversity and community cohesion

While many of the media and communications objectives focus on external visitors, the Festivals also have a more local impact on the communities that they engage through their programmes. These community or social impacts thus in many ways stem from the outcomes that individuals experience. Underlying this understanding of community impacts is the notion of social capital.

Social capital is a concept that was developed to examine the value of social networks. It refers to the collective value of all 'social networks' (who it is that people know) and the inclinations that arise from these networks to do things for other people (the norms of reciprocity and trust). From this perspective, connections to other people become a sort of asset that can benefit both individuals and communities.

Commentators have identified different kinds of social capital that arise from different kinds of social networks:

- **Bonding social networks** – this refers to the strong bonds forged within relationships between existing groups (like families, or existing community or ethnic groups)
- **Bridging social networks** – the weaker but broader bonds of more distant relationships between different groups and individuals (e.g. business associates, general acquaintances, people from different community or ethnic groups)
- **Linking social networks** – links between individuals and groups to others with different levels of power or social status. It is anticipated that this can be beneficial where a group or individual who does not have power or resources is 'linked' to another that does.

Governments internationally – and a variety of other public agencies – have identified social capital as a crucial factor in the

success of public policies, from improving health outcomes to strengthening local democracy.⁴⁰

The Scottish Executive's Community Regeneration Statement (2002), sees social capital as key to improving the quality of life in deprived communities by building people's confidence 'to do more for themselves and to ask for the services they need' and by developing 'systems that get people involved and let them have a say in their communities'.⁴¹ The idea of using social capital as a way to 'empower' citizens also underpins the Communities National Outcome: 'We have strong, resilient and supportive communities where people take responsibility for their own actions and how they affect others.'

Social capital as a concept has an appeal to the cultural sector for a variety of reasons beyond the tactical appeal of aligning its interests with the government of the day.

- **Alignment with 'core purpose'**: it is perhaps not unsurprising that there is some research which shows that culture can be a good way of building social capital. Culture and sport's 'core purpose' regularly deals with bringing people together from both similar and different groups (bonding and bridging); and challenges people's ideas about both their own and other cultures (bridging). Research also suggests that those who participate in cultural activities are more likely to volunteer in other capacities (volunteering is often used as a key proxy measure of social capital).⁴² Furthermore, there is evidence that suggests that participation in cultural activities has more influence than other kinds of participatory activities when it comes to

⁴⁰ C.f. the context section of Rushton (2005) 'Volunteers, helpers and socialisers: social capital and time use'. http://www.statistics.gov.uk/articles/nojournal/Time_Use_Volunteers_helpers_socialisers.pdf

⁴¹ Scottish Executive (2002) *Better Communities in Scotland: Closing the Gap*, Scottish Executive

⁴² Jeanotte, M. S. (2003) *Just Showing Up: Social and Cultural Capital in Everyday Life*. SRA. Department of Canadian Heritage, http://www.sciencesociales.uottawa.ca/governance/eng/documents/just_showing_up.pdf

developing particular elements of social capital, such as trust and tolerance.⁴³

- **Theoretical:** it provides a theory for understanding how participation and individual learning has a wider social influence. It also provides a model for thinking about what happens when cultural institutions come into contact with people (and the nature of the social interaction that is taking place).
- **Methodological:** in the short term, it is easier to demonstrate a contribution towards the formation of social networks, relationships and links to resources, than to longer term socio-economic outcomes and targets.

Despite this enthusiasm for enhancing social capital, even government policymakers have admitted that not all social capital is good or even neutral. Bonding social capital can facilitate all manner of collaborative behaviours; from local conservation volunteers to the (negative) strong bonds between the Sicilian Mafia. In addition, growth in the collective stock of social capital at the level of a neighbourhood can be consistent with the exclusion of particular individuals or groups, as when communities 'bond together' against those they perceive to be undesirable.

The notion of social capital underpins the discussion of the outcomes reported in this section below.

5.3.1 Brings the local community together

The Festivals all provide opportunities for 'informal sociability' (though this varies according to the type of event). This is a phrase used by social capital researchers to describe scenes of face-to-face interaction which generate or maintain social networks; a building block of social capital.⁴⁴ Such instances of 'informal sociability' would include both

interactions with friends or kin (representing a 'bonding' experience), and with more distantly connected people (representing bridging social capital) from the same community.

While these instances are likely to happen at all Festivals (e.g. before/after the performance or during the intermission), this outcome was considered to be particularly relevant to those Festivals that provide 'communal' experiences, such as the Mardi Gras Event at the Edinburgh Jazz and Blues Festival, the daily free Fringe events on the High Street or the Torchlight Procession at Edinburgh's Hogmanay. We therefore asked audiences at the Edinburgh Jazz and Blues Festival, Edinburgh's Hogmanay and the Edinburgh Festival Fringe whether or not they felt that the Festival was an event that brings the whole community together: across the three Festivals, 62% agreed (including 21% who strongly agreed) with this statement. Just under a quarter (24%) was undecided. It may be worth noting that the results for Edinburgh's Hogmanay were stronger than for the other two Festivals, with three quarters of audiences who agreed (including 35% who strongly agreed) with this statement.

In addition, audiences at the Edinburgh Mela were asked whether, other than the people they came with, they had talked to people from their own community during the event. 'Community' was not defined more specifically and it could therefore mean ethnic, religious, geographical community and so on. The way in which the respondent interpreted the term was less important for this question as the main purpose was to assess whether the Edinburgh Mela contributes to increased contact between people that the respondents self-define as being similar to themselves. The results show that a little under two thirds of the audiences (62%) did indeed talk to people who they consider to be from their own community during the event, while 29% said that they did not and 9% chose the option 'Don't know'.

5.3.2 Increasing opportunities to meet people from other backgrounds

More than just offering opportunities to meet people in general, the Festivals do provide the opportunity to meet people from different backgrounds in terms of age, ethnicity or faith and so on. This is

⁴³ Stole, D. and Rochon, T. (1998) 'Are all associations alike? Member diversity, associational type and the creation of social capital'. *American Behavioural Scientist*. (Vol 42, No 1). Abstract available at: <http://abs.sagepub.com/content/42/1/47>

⁴⁴ Hall, P. (1999). 'Social Capital in Britain', *British Journal of Political Sciences*, Vol. 29, No. 3, pp. 417-46., <http://www.abdn.ac.uk/sociology/notes06/Level4/SO4530/Assigned-Readings/Seminar%209.2.pdf>

particularly relevant for the Edinburgh Mela whose core mission is to promote cultural diversity through the arts. Therefore, we asked a number of questions at the Edinburgh Mela which were not asked at any of the other Festivals. This is not to say that the other Festivals may not provide any such opportunities but – given the obvious constraints in terms of the number of questions that can reasonably be asked at any one Festival – these indicators were considered to be of lesser relevance to the other Festivals.

The first audience question at the Edinburgh Mela asked whether visitors had talked to people from another community during the event. Again, the term ‘community’ was self-defined by audiences. There are slightly less people stating that they had talked to people who they consider to be part of another community, compared with the earlier question about speaking to people from their own community (59% compared to 62%). Nevertheless, the result is still overall strongly positive, with only approximately one third (32%) of respondents saying that they did not talk to people from other communities.

In addition to looking at whether the Festival has led to increased contacts with people from different communities, we then asked another indicator that interrogates whether audiences feel that people from these different communities get on well together at the level of this event. There is strong agreement with this statement: 91% agree (including 39% who strongly agree) that the Mela is an event where people from different backgrounds get on well together.

A slightly broader question (asking people to assess how well people get on together within their neighbourhood) is included in several large-scale surveys (e.g. the Place Survey or the Citizenship Survey) as an indicator of community cohesion. While it would be too much to extrapolate from a three-day Mela event to a wider statement about community cohesion in Edinburgh generally, or even within the context of the local Leith community, it nevertheless demonstrates positive social interactions and experiences which have a bearing on the following outcome.

5.3.3 Better understanding of own and other cultures

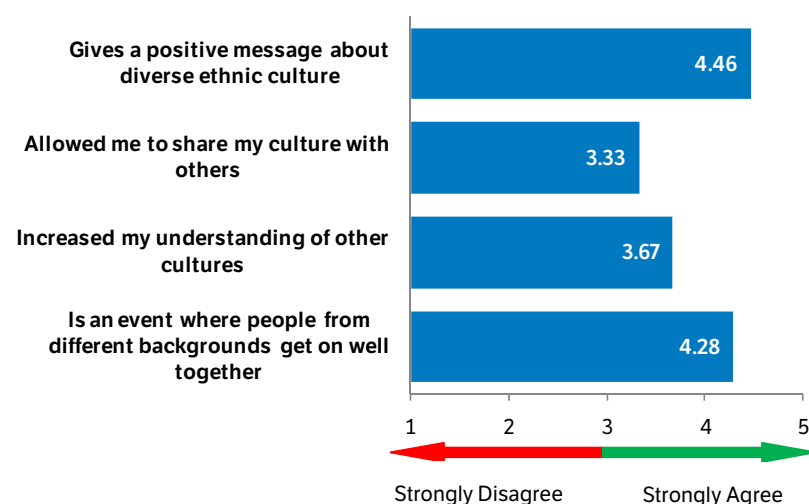
Increasing contact between people from different communities can be seen as a first step to increasing understanding between these different groups. But in addition to facilitating contact between people from different backgrounds, the Edinburgh Festivals can also contribute to increased intercultural understanding through the artists and programming they present, as well as through the staff and volunteers they work with (for a discussion of the latter see section 5.5). Almost all the Festivals showcase artists from around the world. However, a smaller number of Festivals make the exploration of different cultures a particular theme of their programme (for instance, this year’s theme of the Scottish International Storytelling Festival was ‘Eastern Routes’, focusing on tales and storytellers from Asia).

We therefore asked audiences whether they felt that the Festival event had increased their understanding of other cultures. Audiences of the Edinburgh Mela responded generally positively: 16% strongly agreed and 49% agreed that attending the event had increased their understanding of other cultures. A further 30% were undecided. Similar results were reported from the volunteers at the Edinburgh Mela. Interpreting the negatively phrased statement,⁴⁵ 68% felt that their engagement had made a difference to their knowledge and understanding about other cultures, with a further 24% being undecided. We also asked audiences at the Edinburgh International Film Festival and the Scottish International Storytelling Festival and, interpreting the negatively phrased statement,⁴⁶ 58% felt that the event had made a difference to their knowledge and understanding of other cultures, again with another 24% having neither agreed nor disagreed.

⁴⁵ 68% of volunteers disagreed (including 15% who strongly disagreed) that their engagement had made no difference to their knowledge and understanding about other cultures.

⁴⁶ 16% strongly disagreed and 42% disagreed that the event had made no difference to their knowledge and understanding of other cultures.

Figure 27. Audiences' views on the Edinburgh Mela's role in promoting greater cultural understanding (1=strongly disagree, 5=strongly agree), 2010



Source: BOP Consulting (2011)

Another indicator that is particularly relevant to the Edinburgh Mela is audiences' ability to share their own culture with others through the means of the Festival events. The Edinburgh Mela aims to be a celebration of diverse ethnic culture, with a particular focus on South Asian culture, and to offer an opportunity to share and provide information about it. Audiences of the event are positive about the messages that the Festival conveys about diverse ethnic culture: More than half (54%) strongly agreed and another 39% agreed that the Edinburgh Mela gives a positive message about diverse ethnic culture.

However, audiences are less sure whether they have had an opportunity to share their own culture during the event: only 40% agreed or strongly agreed with this statement, while 42% neither agreed nor disagreed. These relatively low results may be linked to the ethnic and cultural origin of the respondents themselves. 74% of the Edinburgh Mela's audiences are from a white ethnic background and, given the Festival's focus on primarily South Asian culture, these audiences may feel that their own culture is less represented at the Festival – hence not giving them an opportunity to share it. Indeed, when analysing the

question for only those audiences who stated that they are from a non-white ethnic background, the results become much stronger: 62% agreed (including 25% who strongly agreed) that the event had given them an opportunity to share their own culture. A further 25% were undecided.

5.3.4 Increasing quality time together as a family

The final outcome in this section was interested in the particular benefits of families attending Festival events together. Several of the Festivals include dedicated family events (e.g. the Imagine weekend programme is primarily aimed at family audiences, or the Edinburgh International Science Festival's family programme in the City Arts Centre), while others showcase events which are not primarily targeted towards a family audience, but attract a higher proportion of this group than others (e.g. Edinburgh Jazz and Blues Festival Mardi Gras).

Research suggests that enjoying time together as a family is a key driver in creating stronger bonds and new 'rituals' and behaviours within families. Moreover, there is evidence from a number of evaluations that cultural activities in particular enabled families to spend 'quality' time together.⁴⁷

We therefore asked audiences at a number of Festivals whether they felt that the event 'had given them the opportunity to spend some quality time together as a family.' The existing positive research findings outlined earlier are reflected in our own survey results: 79% of audiences agreed (including 38% who strongly agreed) with the above statement. A further 16% neither agreed nor disagreed.

⁴⁷ RAND Europe (2008) *Vital Communities: Review and analysis of the research*, (Available online: http://www.randproject.org/pubs/technical_reports/TR549/) or United Way of Massachusetts Bay, Harvard Family Research Project & Build the Out-of-School Time Network (2006) *Focus on Families! How to Build and Support Family-Centered Practices in After School*

5.3.5 Summary and conclusions

With the exception of the Edinburgh Mela, achieving social outcomes is not the primary aim of any of the Festivals. Nevertheless, our research shows that the Festivals do have a number of social impacts, in addition to promoting local pride and a sense of belonging. In this study, the Festivals' social impacts were interrogated based on the concept of social capital, which considers the formation of social networks, relationships and links to resources as a first step in achieving longer term socio-economic outcomes. From this perspective, there is evidence that the Festivals help to build social connections between people – whether between family members, or between people from both similar and different communities. Providing opportunities for people to meet people from, and share messages about, different cultures – within the positive and informal context of a cultural event like the Edinburgh Mela – also helps people to increase their understanding of other cultures.

5.4 Social impact: Contribute to well-being and quality of life

While the presence of health and well-being in the Framework may seem initially unusual, it is there for two reasons:

- there is an increasing body of medical research on the positive effects that participation in culture and leisure activities can have in addressing some medical conditions, particularly for older people and/or conditions that are more prevalent among older people⁴⁸
- participation in culture and leisure activities is also thought to be important to supporting all round well-being (in the sense of ‘a positive physical, social and mental state’⁴⁹) and ‘happiness’.

There are both general and specific health and well-being outcomes that may arise from attending or participating in the Edinburgh Festivals. The first is the general well-being effect that may be generated through the stimulation of the event/activity and could potentially be experienced by any member of the public.

While results are not very strong, audiences nevertheless reported positive well-being outcomes overall. Interpreting the negatively phrased statement,⁵⁰ 55% of audiences felt that the event had made a difference to their well-being, while 28% were undecided. In addition, at the Edinburgh Mela and the Edinburgh International Science Festival we asked the same question, only positively phrased, and similarly to the other Festivals, 56% agreed or strongly agreed that the Festival event had ‘increased their well-being’, with a further 35% who neither agreed nor disagreed. These figures are in line with other cultural and heritage events research. For instance, 56% of visitors at the

Heritage Open Days 2010 programme said that their participation in the event had increased or greatly increased their ‘overall well-being’.⁵¹

The second outcome relates to the health and well-being benefits that may accrue to a particular target group, whether this is older people – for whom the benefits of participation are greater and yet they are simultaneously less likely to participate⁵² – or another specific target group, such as children and young people, for which cultural activities have been shown to have beneficial impacts on their overall emotional, mental and social well-being.⁵³

Within the context of this research we looked at the well-being effects on children. Firstly, we asked parents at the Bank of Scotland Imagine Festival and the Edinburgh International Science Festival whether they felt the Festival events had ‘increased their children’s social, developmental or emotional well-being’. Both the Festivals are interesting in that they offer activities for very young children, e.g. the Bank of Scotland Imagine Festival offered several participative theatre and creative movement events for babies and children up to the age of 4 or 5 years. These early development years are the focus of much of the well-being research referred to above. Our own research confirms these findings: 65% of parents agreed or strongly agreed that the Festival event had improved their children’s well-being (a further 31% were undecided).

We then asked teachers at the Edinburgh International Festival, the Edinburgh International Book Festival and the Scottish International Storytelling Festival about the well-being effects on the school children. These Festivals predominantly work with slightly older age groups (i.e. children of school age) and this may be an explanation as to why the well-being effects are weaker for these Festivals: Interpreting the

⁴⁸ These include dementia, greater life expectancy (particularly for men) and improved cognition in middle age (see BOP (2010) *Assessment of the social impact of volunteering in Heritage Lottery-Funded projects: year 2*, for a discussion of this literature). http://www.hlf.org.uk/aboutus/howwework/Documents/Social%20Impact%20of%20Volunteering%20Yr%202%20Final%20Report_New%20Format_Aug%2010.pdf

⁴⁹ Steuer, N and Marks, N (2008) *Local Wellbeing: Can we Measure It?*, nef report prepared for the Local Wellbeing Project.

⁵⁰ 55% of audiences disagreed or strongly disagreed that the event had ‘made no difference to their well-being’

⁵¹ Heritage Open Days (2010)

⁵² Scherger, S (2009) ‘Cultural practices, age and the life course’, in *Cultural Trends*, Vol. 18, Issue 1 March 2009, pages 23 – 45. Abstract available at: <http://www.informaworld.com/smpp/content~content=a909039168~db=all~jumtype=rs>

⁵³ GEN (2011) *Evaluation of Big Noise Youth Orchestra*, for Scottish Government Social Research; BOP Consulting (2011) *Signposting the Future. An Evaluation of Creative Learning at Norfolk and Norwich Festival*, for Norwich and Norfolk Festival; Morris Hargreaves McIntyre (2005) *Confidence All Round* for MLA

negatively phrased statement,⁵⁴ 47% of the teachers felt that the Festival had made a difference to the children's well-being, but most teachers were undecided (39%).

When looking at these well-being results overall (and their relatively low results compared to other outcome areas), it is worth keeping in mind the short engagement span that audiences have with the Festival activities during the actual Festival period. Other research shows that one-off attendances are less likely to result in positive well-being effects than more sustained forms of participation. To test this further, we also asked these well-being questions of those groups who are engaged over a period of time (especially volunteers and temporary staff). Their experience of working with the Edinburgh Festivals may have a longer lasting influence on their well-being which may go beyond simple measures of subjective well-being (such as happiness) to include elements of personal development that are also known as 'psychological well-being'. This includes feeling useful and valued, self esteem, as well as the ability to make decisions and cope with setbacks.

Within the research, we tested whether the Festivals' volunteers and temporary staff experienced both such 'subjective' and 'psychological well-being' outcomes (also see section 5.5.1). Firstly, they were asked about the impact of their Festival engagement on their overall well-being. Interpreting the negatively phrased statement,⁵⁵ 61% of temporary staff felt that the Festival had made a difference to their well-being, while 31% were undecided. Exactly the same proportion of volunteers (61%) felt that the Festival had made a difference, however there were more volunteers who strongly disagreed with the negatively statements (28% who strongly disagreed vs. 17% of temporary staff). Most of these were volunteers from the Edinburgh International Festival, who are part of the Festival chorus. This is interesting to note as these Chorus members tend to be older than volunteers at other Festivals, and

volunteering research suggests that well-being outcomes are particularly strong for older people.⁵⁶

We then asked about the extent to which volunteers and temporary staff feel that they are making a useful contribution (a question that combines both the ability to engage socially with a measure of self worth). Across the Festivals, 71% of temporary staff agreed (including 10% who strongly agreed) that their engagement had 'increased their sense of making a useful contribution.' This outcome is even stronger for volunteers: 79% of volunteers agreed (including 38% who strongly agreed) with this statement. Again, the 'strongly agree' category is overproportionally chosen by volunteers from the Festival Chorus.

5.4.1 Summary and conclusions

Participation in culture and leisure activities is thought to support all round well-being (in the sense of 'a positive physical, social and mental state') and 'happiness'. Although relatively mild, the Festival research was able to demonstrate a noticeable impact on people's all-round well-being, which is in line with other cultural and heritage events research.

In addition, the Festivals have a stronger well-being impact on particular groups. Firstly, they positively affect the overall emotional, mental and social well-being of children in their early development. Secondly, they have greater well-being impacts on more intensely engaged groups, such as temporary staff and volunteers. This includes positive impacts on both general well-being and specifically their feeling of self-worth. The latter is even stronger for the comparatively older volunteer pool – a finding that is entirely in line with other cultural and heritage research that suggests that the benefits of participation are greater for older people.

⁵⁴ 47% of teachers disagreed or strongly disagreed with the statement that 'the Festival events made no difference to the children's well-being'

⁵⁵ 61% of temporary staff disagreed (including 17% who strongly disagreed) that the Festival 'had made no difference to their well-being'

⁵⁶ BOP (2010)

5.5 Economic impact: Provide routes to employment and skills

As mentioned above, volunteers and temporary staff stand out from other attendees or participants of the Edinburgh Festivals in that their engagement is likely to be longer and more intensive. In addition to developing personally through the experience, this may provide the basis for the acquisition of transferable skills and the opportunity to widen social and professional networks.

5.5.1 Personal development

The ‘personal development’ outcome is closely related to the psychological well-being outcomes reported in section 5.3.5. There is some existing research that suggests that *volunteering* in the cultural sector contributes to personal growth and development.⁵⁷ Temporary staff are rarely considered in this existing body of literature. However, given the importance of this cohort to the Festivals, we decided to test out whether temporary staff report similar outcomes.

The first indicator which we looked at was the extent to which volunteers and temporary staff report increased self-esteem and confidence in their own abilities as a result of their involvement with the Festivals. The results show that the engagement with the Festivals has had a positive impact in this area: 69% of volunteers stated that their ‘self-esteem and confidence in their own abilities’ has increased or increased greatly (in addition to another 30% who said it stayed the same). In comparison, a slightly smaller proportion of temporary staff (63%) stated an increase in their self-esteem and confidence, and there were more of them saying that their self-esteem had ‘stayed the same’ (36%).

The second indicator looks at volunteers’ and temporary staff’s willingness to engage with new and novel experiences, to learn and to explore – all elements of curiosity. Research suggests that curiosity helps to build knowledge, skills and expertise, and that it also plays a

role in developing meaning in life, building tolerance to distress and uncertainty, and contributes to satisfying and engaging social relationships.⁵⁸

We therefore asked volunteers whether their participation had any effect on their ‘willingness to try new things’. 71% of volunteers reported that this had ‘increased’ (including 27% who said their willingness had ‘increased greatly’) as a result of their volunteering. Again, the proportion of temporary staff stating an increased willingness for such novel experiences is slightly lower: 63% reported an ‘increase’ (including 13% who stated that their willingness had ‘increased greatly’).

It is worth noting that these indicators of volunteers’ and staff’s personal development are very strong, compared to other cultural heritage volunteering research. An earlier piece of research by BOP looking at the impacts on volunteers participating in the Heritage Open Days 2010 event using the same questions (which were developed by the Institute for Volunteering) showed that only 36% of volunteers stated an increase in their ‘self-esteem and confidence in their own abilities’ and 48% an increase in their ‘willingness to try new things’.⁵⁹

5.5.2 Improved transferable skills

Using volunteering as a route into the labour market is a regularly reported benefit for many volunteers in other sectors. While there is some research showing a link between volunteering and skills development and employability in the cultural heritage sector, this seems to be less pronounced in the wider cultural domain.⁶⁰

One of the reasons for this missing evidence is that ‘traditional’ volunteers in the cultural sector (and even more so in the cultural heritage sector) are of a certain demographic profile: they are often well educated, well connected and relatively old. Considering this volunteer profile, there are therefore limits to the extent to which these traditional

⁵⁸ Kashdan et al (2009) ‘The curiosity and exploration inventory-II: Development, factor structure, and psychometrics’. *Journal of Research in Personality* 43, 987–998, p987 and 988

⁵⁹ Heritage Open Days (2010)

⁶⁰ Institute for Volunteering Research (2005) *Volunteers in Museums: Key Findings and Issues from the Literature*, report for Re:source

⁵⁷ BOP (2010)

volunteers can further enhance both their skills and aptitudes (their 'human capital'), and their social capital (their contacts and networks and the social norms that these engender).

Previous involvement and experience is also common among the Festivals' volunteers and temporary staff (if somewhat lower than what is known from other research): more than half of volunteers and temporary staff (56% and 52% respectively) had been engaged with the particular Festival prior to this year. In addition, 55% of temporary staff had worked with another cultural Festival or organisation and 44% had worked with another local project before becoming involved with the Festival this year. Volunteers were less likely to have been involved, but there were still slightly more than a third of them who had volunteered with another cultural organisation (37%) or another local project (36%) in the past.

In addition to actual experience in the cultural sector, the large majority of volunteers and temporary staff had an existing affiliation and this is a major driver for their involvement: 85% of volunteers and 71% of temporary staff said that they became involved because they 'had an existing interest in, and passion for, the art form or industry – the strongest motivation of all stated.

Having established that many volunteers had existing interest and experience in the area is important to note as it is likely to have a bearing on the results of the next outcome area. This consists of testing out whether the engagement with the Festivals has contributed to developing transferable skills such as those required in the labour market. Looking at such transferable skills is interesting for two reasons – one of them being applicable to all Festivals and one being specific to the Edinburgh Mela.

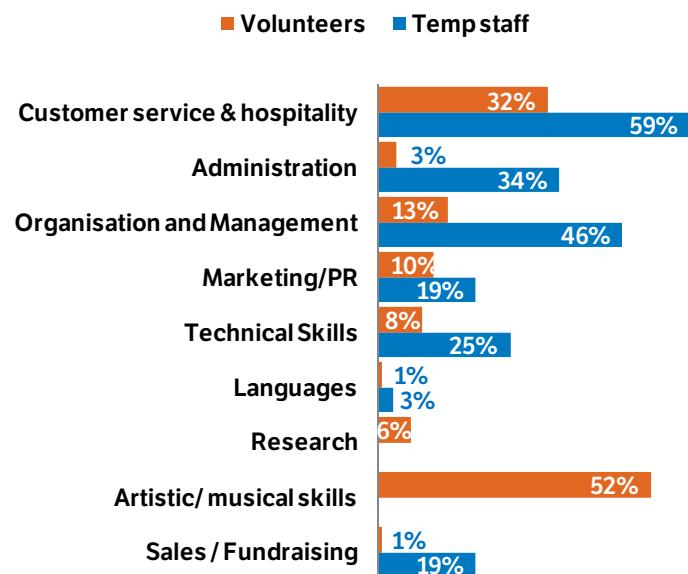
Firstly, most Festivals assumed that skills development and indeed work experience in helping to find a job was one of the main reasons for volunteers and temporary staff to get involved. Our results confirmed this in part: these career-oriented motivations do play a role for some, but they are the least frequently mentioned within the list of motivations. 26% of volunteers and 34% of temporary staff stated that 'learning new skills' was a driver for their involvement. 'Continuing to use and update existing skills' was actually considered to be more important and was named by 36% of volunteers and 47% of temporary staff. Finally,

there were 30% of volunteers and 38% of temporary staff who stated 'work experience/help in getting a job' as one of their motivations to become involved with the Festival.

Secondly, the Edinburgh Mela makes specific efforts to recruit and develop 'volunteers from non-traditional' backgrounds. This is linked to the Festival's secondary aim of supporting culturally diverse practice in the arts in Scotland. This means that any skill development and training of volunteers at the Mela simultaneously helps increase the diversity of the cultural workforce in Edinburgh and Scotland.

Therefore, in our research, volunteers and temporary staff were asked to rate the effect of their Festival engagement on a number of vocational skill areas (as shown in Figure 28).

Figure 28. Proportion of volunteers and temporary staff reporting increased skills in the different transferable skills areas, 2010



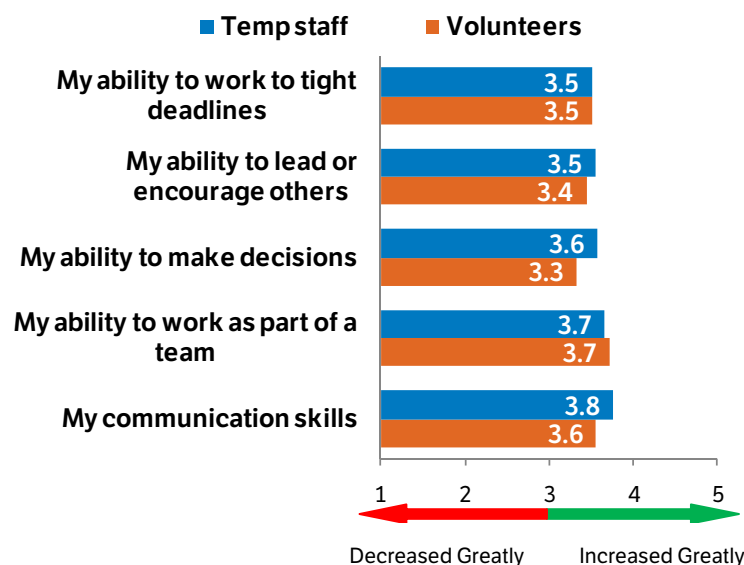
Source: BOP Consulting (2011)

The above figure shows that both groups reported developing skills in a number of vocational areas; however, temporary staff do so more frequently than volunteers. The most frequently named areas for temporary staff are customer service and hospitality skills (named by 59%), organisation and management (46%) and administration (34%). In contrast, the single most frequently named skill area for volunteers is ‘artistic/musical skills’ (52%), which reflects the relatively high representation of Festival Chorus members within the overall volunteer sample.

In addition to such vocational skills, we also asked volunteers and temporary staff about their development of non-cognitive skills. As Figure 29 below shows, volunteers and temporary staff have increased skills in these areas in almost equal measure. The largest increase for temporary staff was in the area of communication skills (71% stated that they have increased or increased these greatly), followed by team working skills (62% stated an increase in this area). Team working skills

was also the area where volunteers have improved most: 60% stated that they have developed their skills in this area.

Figure 29. Skills development in non-cognitive skill areas by volunteers and temporary staff (scale: 1=Decreased greatly, 5=Increased greatly), 2010



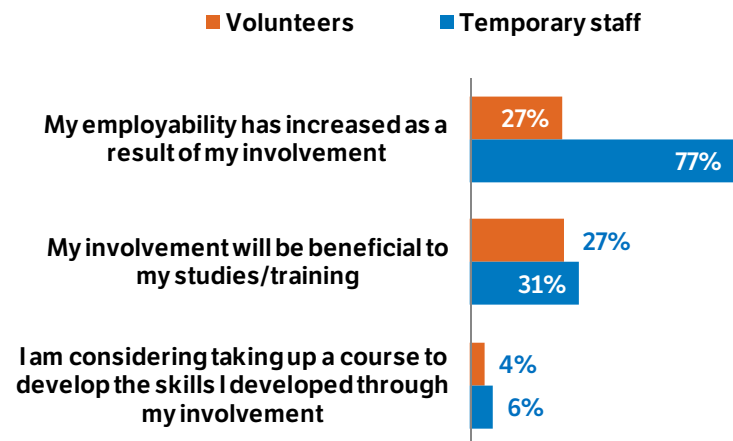
Source: BOP Consulting (2011)

We then asked whether volunteers and temporary staff felt that these skills were useful in the future – followed by a set of questions probing how, in particular, these skills are transferable to their professional and career development context. Figure 30 below shows the results of these questions. More than three quarters of temporary staff (77%) felt that their employability has increased as a result of their work with the Festival, while almost one third (31%) thought that their experience would be useful for their ongoing studies or training. In addition, a very small proportion of staff (6%) was considering further education and training in this area.

Such professional development outcomes were less in evidence for volunteers: Just over a quarter (27%) thought that their employability

had increased and that their volunteering was beneficial to their studies and training. Again, there was a very small proportion of volunteers (4%) who considered taking their learning forward by taking up a course related to their volunteering experience.

Figure 30 Volunteers' and temporary staff's views on transferability of skills developed through engagement with the Festivals, 2010



Source: BOP Consulting

The findings in this section show that – compared to volunteers – temporary staff are more likely to be motivated by professional skills enhancement, and to develop employability skills during the course of their involvement with the Festivals. This could be due to the profile of volunteers and temporary staff included in the sample. Approximately half of the volunteer respondents are from the members of the Edinburgh International Festival's Chorus. This suggests that the age profile of volunteers is likely to be older than that of temporary staff. It is therefore perhaps not surprising that career aims and development are of less interest to the volunteer pool overall than for the younger temporary staff cohort. It also suggests that these older volunteers may already have a higher level of skills prior to their involvement and hence any further improvements are modest.

Moreover, this finding furthers the to-date meagre research base on temporary staff in the cultural sector. They show that many of the benefits which are generally attributed to volunteering are shared by temporary staff. But they also suggest that many temporary staff – in their search for permanent employment in the cultural and creative sector – would have been 'obliged' to take up unpaid work to build up their work experience.

5.5.3 Widen social networks and contacts

The findings reported above show that many volunteers have volunteered in the past, albeit at lower levels than is known from the wider cultural sector.⁶¹ But volunteering with the Festivals is likely to lead to further volunteer engagement in the future: while 37% had volunteered with another cultural organisation or Festival before, 84% reported that they would consider doing so in the future. This also translates into civil areas outside the cultural sector, if to a lesser degree: 36% stated that they had volunteered with a non-local organisation before but 43% state that they would consider taking up volunteering opportunities with a local organisation outside the cultural sector in the future. In contrast, temporary staff are less inclined to go on to further volunteering – certainly outside the cultural sector as only a third said that they would consider volunteering with such a non-cultural local organisation.

Widening social networks and professional contacts are also major drivers and outcomes of volunteering. 60% of volunteers strongly agreed or agreed that they had made 'useful contacts with people from the sector' through their volunteering experience. Just over half of temporary staff (53%) strongly agreed or agreed with the same statement.

Two of the top three motivations for becoming involved with the Festivals are also related to the social aspects of the Festivals: half of all volunteers became involved because they wanted to 'meet new people

⁶¹ For instance, 74% of volunteers of Heritage Open Days 2010 events had volunteered with their organisation before, 24% had volunteered with another cultural or heritage organisation and 59% had volunteered with another local organisation or project.

and make new friends' and 54% because they wanted to 'be part of the buzz of the Festival experience.' And the Festivals clearly do offer them such opportunities: 86% stated that they have met like-minded people through their volunteering. The same applies to temporary staff, and even a little more so: 51% were motivated by the prospect of meeting new people/making friends and 65% by being 'part of the buzz of the Festival experience'; 88% said that they had met like-minded people.

5.5.4 Summary and conclusions

Volunteers and temporary staff who were engaged in Edinburgh's Festivals have developed on a personal level through the experience. Indeed, compared to other volunteering research in the cultural heritage field, the findings around increased self-esteem and curiosity are particularly strong.

When looking at transferable skills, temporary staff are more likely to be motivated by professional skills enhancement, and to develop employability skills during the course of their involvement with the Festivals than volunteers. This is likely to be a factor of the profile of volunteers and temporary staff included in the sample. The age profile of volunteers is older than that of temporary staff, hence career aims and development are of greater interest to the younger temporary staff cohort, and older volunteers already have a higher level of skills prior to their involvement and hence any further improvements are modest.

Our research shows that the Festivals contribute to volunteers and temporary staff further building their social capital: many of them become involved with the Festivals because of the opportunities that are offered to build new social networks. The research also confirms what is known from other cultural sector volunteering: many of the Festival volunteers have volunteered in the past and they are likely to volunteer again in the future, including in other areas of civic life. In contrast, temporary staff are less inclined to go on to volunteering, certainly outside the cultural sector.

5.6 Economic impact: Support the wider economy in Edinburgh and Scotland

This outcome concerns the total economic impact generated by the Festivals, not just at venues across Edinburgh, but across all sectors of the economy.

In the main, the Edinburgh Festivals have not had the contribution that they make to the economy as a core aim. However, as the Festivals have grown in size and stature, they have become a key contributor to the economy of both Edinburgh and Scotland. As will be seen below, the economic importance of the Festivals lies primarily in the expenditure made by audiences on trips to the Festivals. Most of this expenditure is generated outside of the cultural and events sector, and is made instead on items such as accommodation, food and drink, shopping and transport. In this way, the Festivals economic impact is larger for the wider economy of Edinburgh and Scotland than it is for the cultural economy.

The economic importance of the Festivals is acknowledged by the key funding bodies, including Edinburgh City Council, in which the Festivals' contribution to the economy is included within their Single Outcome Agreement (SOA),⁶² the Scottish Government, who have funded twelve of the Festivals over the last three years through the Expo Fund, and EventScotland who provide funding to both individual Festivals and Festivals Edinburgh.

The collective contribution that the Festivals make to Edinburgh and Scotland was demonstrated in the 2004-5 SQW report that looked solely at the economic impact of the Festivals. One of the requirements of the current evaluation has been to, as far as possible, produce an economic impact methodology that is comparable with the SQW methodology, while also suggesting refinements and improvements to

the method where relevant. Also, there are three major changes between the two studies that should be noted:

- The composition of the Festivals themselves have changed – in 2004-05, the Art Festival was not included in the research, but there were also a number of other Festivals included that are no longer running or are not included within the Festivals Edinburgh portfolio. This means that, while the 2004-05 study included 17 Festivals, the 2010 study looks at 12. Also, some of the other Festivals have changed an element of their structure or organisation, which has affected the degree of comparability. In particular, the Film Festival has moved from being one of the Festivals that happens simultaneously in August/September, to an earlier slot in June, the Jazz Festival no longer produces one of its major outdoor events (Jazz on a Summer's Day) and the Mela has moved to become an all-ticket, paid-for event.
- Survey medium and methodology – as noted above, this year's study has involved a variety of survey mediums and methods: online and offline, administered and self-completion. While the statistical checks run across the different survey suggest that the survey medium has not introduced bias in terms of key variables within the economic impact calculations, it has had an effect through non-response to one question, which has necessitated a change in how a key variable for the summer Festivals has been calculated.⁶³
- Refinements to the calculations for establishing the unique number of visitors to each Festival have been made – in particular, weighted averages have been used to account for the specific composition of visitor segments and visitor types to the Festivals, which make the results significantly more accurate.

A detailed account of how the economic impact has been calculated is contained within a separate Technical Report. The sections in this report therefore summarises the economic impact analysis, highlighting the key contributory factors.

⁶² This SOA sets out the City of Edinburgh Council's and the Edinburgh Partnership's local outcomes showing how these outcomes contribute to the Scottish Government's relevant National Outcomes.

⁶³ This question was the question 'Which Festivals influenced your trip?'. For more details, see the Technical Report.

What should be stated is that the variety of changes that have had to be made has affected the direct comparability between the two data sets. This does mean that the results of this 2010 study should be seen much more in terms of an improved, forward-looking benchmark, which will be added to and updated in the coming years

The aggregate economic impact figures presented in the sections below have been calculated from visitor and organiser data from 11 Festivals. Apart from being included in the expenditure figures of journalists attending the summer Festivals, the Edinburgh Art Festival has not been included in these calculations. This is due to the particular challenges that have come to light over the course of the study about how to obtain a sufficient number of responses for this Festival this year. These particular challenges include the following:

- Edinburgh Art Festival is not a ticketed event, meaning that there is little opportunity to capture data through ticket sales, and other registration processes.
- As the visual arts in the UK are predominantly unticketed and free at the point of access, there is a strong culture of anonymity among visitors to visual art exhibitions and events, with little expectation to submit names and addresses, and indeed few processes or resources in place in galleries to capture this data.
- Edinburgh Art Festival was not included in the first economic impact study in 2004/05.

We have gained valuable learning through this process, and it is important to ensure that in future iterations of the study, a robust sample from the Edinburgh Art Festival audiences can be included. Addressing these challenges and finding better ways of collecting a robust sample of responses needs to be given more thought going forward (see section 8).

5.6.1 Overview

Economic impact is interpreted within this report as the contribution made by the Edinburgh Festivals to the economy's output, income and employment, for both Edinburgh and Scotland. The calculations for this are based on the analysis of four strands of expenditure:

- audience expenditure
- performers and delegates' expenditure
- journalists' expenditure
- Festival organisers' expenditure

The figures for each type of expenditure can be presented as a gross figure. However, a key part of the estimation process is to establish what proportion of expenditure is genuinely additional for each strand, the net value. This means subtracting the expenditure that would have occurred anyway (the 'deadweight') as well as that which is simply displacing or substituting other expenditure. Once the net expenditure has been calculated, the final stage is to estimate how this flows through the economy to generate additional income, output and employment. This is calculated by applying multipliers to the direct expenditure.

5.6.2 Audience numbers

The basis for the economic impact of the Festivals is the sheer number of visitors that they attract. In 2010, over 4.2m attendances were made across the twelve Edinburgh Festivals. This includes both paid events and free events, such as the estimated quarter of a million people that view the Fireworks Concert that closes the International Festival, or the Jazz Ai Fresco and Mardi Gras events, the daily Free Fringe events on the High Street, the Unbound series at the Book Festival, or a number of free events at Edinburgh's Hogmanay.

However, in establishing the economic impact of these attendances, it is first important to know how many attendees generated the total number of attendances. Visitors can (and do) attend more than one event per Festival. Once this smaller pool of attendees is known, one can then begin to estimate the other factors that generate economic impact: what they are spending money on per day and how many days and nights their trips to the Festivals encompass.

Figure 31 below shows the total attendances and the number of attendees. The data for attendances has been provided by the individual Festivals. The number of attendees is derived from the survey data on the number of events attended – per visitor type. That is, the audience is

composed of different types of visitors, some on overnight trips, many more that live locally in Edinburgh, and it is important to capture this information. Different visitor types have different attending and spending patterns, and the degree to which their spending is genuinely 'additional' to the economy also varies significantly (see below).

Therefore the following five visitor categories have been used within all the economic impact calculations:

1. locals – Edinburgh residents
2. day trippers – from elsewhere within Scotland
3. day trippers – from outside Scotland
4. staying visitors – from elsewhere in Scotland
5. staying visitors – from outside Scotland

The first step is therefore to allocate the overall attendances according to the composition of the five visitor types – for instance, if the proportion of locals attending a Festival was 40% and the total number of attendances to the Festival was 100,000, then 40,000 are estimated to be accounted for by locals. If locals attend, on average, 4 events at the Festival, this means that the number of local attendees at the Festival is 40,000 divided by 4 =10,000. This process is then repeated for the four remaining visitor types. These are then summed to produce the total number of attendees. From this figure, the performers and journalists have then been removed, as their economic impact is dealt with separately. For the 2010 Edinburgh Festivals, this produces an estimate of the number of attendees at just over 1 million.

Figure 31. Number of attendances and attendees to the Edinburgh Festivals, 2010

Festival	Attendance	Attendees
Science	124,285	46,222
Imaginate	9,300	7,771
Film	44,456	5,525
Jazz	37,300	10,401
Tattoo	220,000	218,643
Fringe ⁶⁴	2,743,913	293,797
Mela	34,590	29,811
Art	306,378	-
International	396,713	269,991
Book	200,737	52,522
Storytelling	17,556	2,762
Hogmanay	137,000	70,945
Total	4,272,228	1,008,390

Source: Festivals Edinburgh/BOP Consulting (2011)

This calculation does have a differential effect on the Festivals, as there are very different attendance patterns across the Festivals. For instance, the Military Tattoo is one event, so almost no-one goes twice, and similarly, the large number of visitors to the free Fireworks Concert that closes the International Festival only attend this one event at the Festival. Some of the others only run over a very short space of time, such as the public events for Imaginate and the Edinburgh Mela, which both only run over one weekend, so the number of events are few. This contrasts with other Festival activities, such as the paid events at the

⁶⁴ This figure includes High Street footfall figures, which are estimated by City of Edinburgh Council footfall counters at 914,000 people. However, for the purpose of the economic impact calculations, only the 1,829,913 ticketed attendances were included.

International Festival and the Festival Fringe, which run for over four weeks and have many events – 2,453 different shows in the case of the Fringe (with many more performances than this). This means that, for these Festivals, visitors are likely to have a higher than average attendance.

The level of attendances and attendees alone suggests that some of the Festivals will have a much larger economic impact than others, as Festivals such as the Fringe simply have much larger audiences than others, but this is, of course, not the only determinant of visitor expenditure (see section 5.6.4 below).

5.6.3 Expenditure

For each Festival, average daily expenditure for each visitor type is calculated. This includes:

- expenditure made at the Festival venues (e.g. at the bar/café)
- expenditure outside the venues (e.g. shopping, food and drink, entertainment)
- transport expenditure
- accommodation

Ticket expenditure was not assessed through the visitor survey and was instead provided from the Festivals themselves from their actual box office data.

Whole trip expenditure

A factor that has to be defined in the expenditure calculations is how much of the expenditure made during a trip to the Festivals is allocated to the Festivals?

In this study, and in SQW's previous study, the calculation is based on a 'whole trip' expenditure model. That is, if someone from outside Scotland spends a ten-day holiday in Scotland, but spends only six of these days attending the Festival, all of the expenditure will still be attributed to the Festivals if the visitor states that their expenditure is additional expenditure. There is an alternative approach to this

calculation – the 'activity day' method, which would only include those days directly spent on the relevant activity – in the example above, this would be the six days spent attending the Festival. However, it is the **trigger** for the visit that is important for additionality. Staying visitors and those on day trips were therefore also asked a question about 'how important was the Festival in their decision to visit (i) Edinburgh and (ii) Scotland?' The responses (as reported in section 5.2.2) show that the Festivals are a very significant factor in influencing the decision to visit, thus further confirming the validity of the whole trip expenditure model in the case of the Edinburgh Festivals.

5.6.4 Determinants of visitor expenditure

The next sections detail the key drivers affecting the level of expenditure at the Edinburgh Festivals.

Audience expenditure and length of stay

Two of the key components driving the economic impact of the Festivals are the average expenditure made per day made by visitors to the Festivals and the length of stay (of staying visitors).

Figure 32 below shows these values for the eleven Festivals. They are weighted averages in that they reflect the composition of the audience. Thus, Festivals that attract a lot of locals, such as the Science Festival, Imagine, and the Edinburgh Mela, will have low per person average day expenditures. Locals do not spend on accommodation (a big factor, see section 5.6.4 below), may not have to spend on transport, and may also spend less on food and drink (also a major item of expenditure for Festival visitors). Conversely, those with a high component of staying visitors from outside Scotland, such as the Military Tattoo and Hogmanay, have high day expenditures (which includes accommodation costs), and longer trips. The Hogmanay average day expenditure is the highest, which presumably represents the premium that can be charged for accommodation over the New Year and Christmas period, but it also reflects the fact that, unlike with the summer Festivals, visitors' expenditure is not spread across more than one Festival.

What this means is that, for the summer Festivals, we have had to avoid double-counting by only including the expenditure that relates to the specific Festival in question. The proportion of expenditure allocated to a specific Festival is based on the proportion of the overall number of events that a party attended. For example, for the calculations for the International Festival, if a person reported that their party attended three International Festival events and seven events at the Festival Fringe, then the expenditure reported by this visitor will be multiplied by 30% (i.e. 70% of the expenditure is discounted expenditure, as this is assumed to be related to the Festival Fringe, which would get picked up through the Fringe visitor survey). This is a different, but improved, way of allocating visitor expenditure across the summer Festivals from the SQW study (see the Technical Report for more detail).

What should also be noted about Figure 32 is that we have reported separate figures for visitors to the paid events at the International Festival and to the Fireworks concert. This is to illustrate that the profile is very different in relation to the length of stay for staying visitors, with the large numbers viewing the Fireworks staying for only a short time, in comparison with the smaller numbers to the paid events, who stay for longer.

Figure 32 Average audience expenditure at the Edinburgh Festivals, per person per day, and average length of stay in Edinburgh and Scotland, 2010

Festival	Av. daily expenditure per person (£)	Av. nights spent in Edinburgh	Av. nights spent elsewhere in Scotland
Science Festival	£12.5	4.4	0.4
Imaginate Festival	£5.0	4.4	0.0
Film Festival	£39.7	5.4	0.6
Jazz and Blues Festival	£41.1	5.0	0.8
Military Tattoo	£69.0	2.1	3.7
Fringe	£52.4	5.0	0.7
Mela Festival	£11.0	6.3	0.3
International Festival (paid events)	£57.7	7.4	1.5
International Festival (Fireworks)	£46.6	1.5	0.0
Book Festival	£36.5	6.0	1.2
Storytelling Festival	£19.3	3.8	0.5
Hogmanay	£114.0	3.6	0.8

Source: BOP Consulting (2011)

Additionality

Following the SQW model – and all best practice in economic impact assessment and appraisal, such as that specified by HM Treasury – a key stage of the economic impact calculations is to assess the proportion of expenditures made by all visitor types that would not have been made in the city in any case. This entails converting the gross economic impact into the net economic impact.

For example, many residents who attend the Festival might have visited the city and spent money on their trip even if the Festivals had not

taken place. Therefore the expenditure incurred on the trip to the Festival is simply deadweight and cannot be considered to be additional.

What is important to note is that additionality varies by the place of origin of the visitors, in connection with the geography of the economy that is being assessed. Thus, a day tripper to the Festival from the rest of Scotland, who would have gone on a trip elsewhere in Scotland if the Festivals had not taken place, would have made expenditure that was not additional to the Scottish economy (as it simply **displaced** expenditure from elsewhere in Scotland to Edinburgh), but it would be additional to Edinburgh's economy (as it was being made there rather than elsewhere). Similarly, for a Scottish day tripper who would have gone to work or stayed at home, the expenditure made at the Festivals would not be additional to Scotland (as it is assumed that this expenditure is **deadweight**, as it would have been made in the local economy at a later date), but it would again be additional to Edinburgh as it was spent in the city at the expense of the day tripper's home town. Lastly, for the Festival organisers' expenditure, we also have to account for any **leakage** – that is, expenditure made outside Scotland.

In order to quantify these effects, all visitors were asked what they would have done if the Festivals had not taken place. They were given four options,

1. 'I would have stayed at home or gone to work'
2. 'I would have done something else in Edinburgh/visited the city anyway'
3. 'I would have gone elsewhere in Scotland'
4. 'I would have gone elsewhere outside Scotland'

These responses have been analysed for each of the Festivals, and crucially, for the different visitor types. This is exactly the same question used by SQW in the 2004-5 survey, and the question was also asked of the other visitor segments included within the economic impact calculation (i.e. the performers, delegates, and journalists).

The effect of applying these additionality criteria is dramatic. As can be seen in Figure 33, almost all of the local visitors answer either

option 1 or 2 (stayed home /gone to work, or done something elsewhere in Edinburgh). This means that the expenditure for all but 3% of the locals is not additional to Edinburgh and just 1.1 % of the locals' expenditure is additional to Scotland. The vast majority of local visitors therefore get excluded at this stage from the subsequent calculations of net economic value. What this means is that, in addition to the scale of a Festival, simply having a higher proportion of locals attending will significantly reduce the economic impact of a Festival.

Figure 33. Proportion of visitors to the Edinburgh Festivals, by place of origin, whose expenditure is additional to Edinburgh and Scotland, 2010

Visitor types	Edinburgh	Scotland
Local	3.0	1.1
Visitors from elsewhere in Scotland	85.1	1.6
Visitors from outside in Scotland	79.5	71.6

Source: BOP Consulting (2011)

Additionality was also applied to the ticket expenditure. As the data on ticket expenditure was not collected through the surveys, and captured instead from the Festivals' actual box office data, this was achieved through a slightly different method. The average additionality generated through the surveys per visitor type (locals, staying visitors etc.) was applied to the ticket expenditure, according to the composition of the Festivals' audiences.

Gross expenditure to net expenditure

Gross expenditure in Edinburgh is circa £250m, 89% of which is spent by the audience (£221m). Once the additionality for each Festival has been established, it is possible to convert the gross visitor expenditures made at the Festival into net expenditure – i.e. the proportion of expenditures that is genuinely additional. As Figure 34 below shows, the difference that the gross to net conversion makes when looking at visitor expenditure is dramatic, particularly at the individual Festival level.

The figures show that Festivals such as Science and Jazz have significant gross expenditures at the Edinburgh level –£1.77m and £2.59m respectively. However, after applying additionality, both shrink to a few hundred thousand pounds. This is predominantly driven by the composition of visitors, with the expenditure of locals not only likely to be smaller, but also far less likely to be additional.

The effect is less pronounced when all the Festivals are looked at in the round, as some of the larger Festivals (e.g. the Fringe, the Military Tattoo and the International Festivals), have significant components of non-locals among their visitors. This means that at the Edinburgh level, more than half of all expenditure (60%) to the Edinburgh Festivals in 2010 was additional to the Edinburgh economy. This is almost identical to the proportion of gross expenditure that was additional in the SQW 2004-5 survey. The figure is reduced for Scotland, but still almost half (48%).

Figure 34. Gross and net visitor expenditure (audience, performers, delegates and journalists⁶⁵) at the Edinburgh Festivals, for Edinburgh and Scotland, 2010

Festival	Edinburgh			Scotland		
	Gross expenditure £m	Overall Additionality %	Net Expenditure £m	Gross expenditure £m	Overall Additionality %	Net Expenditure £m
Science	£1.77	34.3	£0.61	£1.92	8.7	£0.17
Imagine	£0.25	53.8	£0.13	£0.25	38.9	£0.10
Film	£2.07	45.5	£0.94	£2.23	34.5	£0.77
Jazz	£2.59	29.6	£0.77	£2.81	11.4	£0.32
Tattoo	£40.05	58.6	£23.45	£75.16	44.3	£33.28
Fringe	£134.11	65.9	£88.44	£147.61	54.4	£80.29
Mela	£2.55	8.9	£0.23	£2.64	5.5	£0.14
International	£27.30	47.7	£13.01	£29.62	34.2	£10.12
Book	£11.30	26.4	£2.99	£12.97	12.3	£1.60
Storytelling	£0.25	48.1	£0.12	£0.28	16.7	£0.05
Hogmanay	£27.14	71.9	£19.51	£32.65	61.2	£19.97
Total	£249.36	60.2	£150.19	£308.14	47.6	£146.81

Source: BOP Consulting (2011)

⁶⁵ The figures do not include journalist expenditure at the summer Festivals, as this expenditure cannot be disaggregated to the individual Festivals as journalists cover more than one of the simultaneously occurring Festivals. The figures have, of course, been added to the eventual calculations (see Figure 39 below)

Visitor segments

What Figure 34 does not show is the relative contribution that the three non-audience segments make to the Festivals. These segments are:

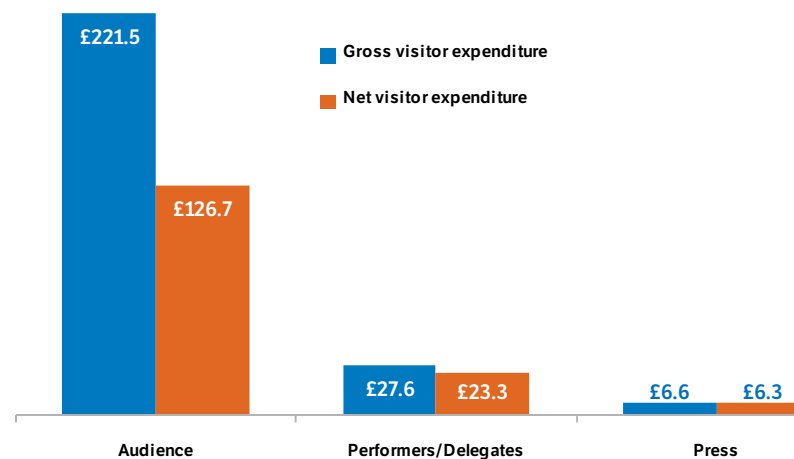
- performers – both individual performers and production companies
- delegates – participants in the delegate programmes run by a number of the Festivals (e.g. Film, Fringe, Imagine, Storytelling)
- press – attending journalists at the Festivals.

As the first of these two categories both consist of practitioners, we have grouped them within the calculations.

For this year's 2010 study, a more concerted effort has been made to survey the non-audience visitors to the Festival. This was mainly because they need to be included in any wider evaluation of the Edinburgh Festivals, as they experience a range of different social and cultural outcomes. But they also contribute to the economic and environmental impacts of the Festivals. This year's study has therefore included surveys of 576 performers and delegates and 369 attending journalists.

Unsurprisingly, given the volume, it is clear that the major economic impact of the Festivals is generated by the audience. Figure 35 below shows the breakdown of gross and net visitor expenditure for Edinburgh according to the three aggregated visitor segments. In terms of net expenditure, 82% is accounted for by the audience. The performers, of which most are drawn from the Festival Fringe, contribute 14% of the total – a not inconsiderable £23m – with the journalists accounting for the remaining 4% (£6.3m).

Figure 35. Comparison of gross and net visitor expenditure to the Edinburgh Festivals (£m), by visitor segments, for Edinburgh, 2010



Source: BOP consulting (2011)

Items of audience expenditure

Having established that the audience expenditure is what drives the bulk of the economic impact of visitors, it is important to understand what audiences are spending their money on.

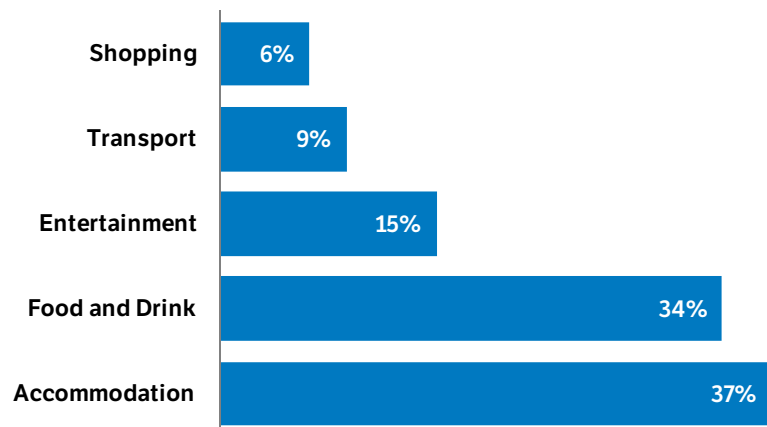
The first factor to examine is how important expenditure on tickets is within the overall picture. Looking at the proportion of **net** visitor expenditure for Edinburgh, ticket expenditure only accounts for 13% of the total.

The remaining 87% of audience expenditure is accounted for by expenditure on accommodation, food and drink, entertainment, transport and shopping. As Figure 36 below shows, two of the five categories account for 70% of all non-ticket, net audience expenditure in Edinburgh: accommodation and food and drink.

This ably demonstrates the contribution that the Edinburgh Festivals make to the tourist economy, with audiences spending an estimated £41m on hotels, B&Bs, guest houses etc (accommodation), and a further £37m in the city's cafes, bars, pubs and restaurants (food

and drink). What should be remembered is that these figures only take into account the net additional expenditure that can be attributed to the Festivals. This means that the major economic impact of the Festivals is not realised in the cultural or events sector, but rather in the city's (and Scotland's) leisure and hospitality businesses.

Figure 36. Breakdown of non-ticket net expenditure for Edinburgh, from audiences to the Edinburgh Festivals, 2010



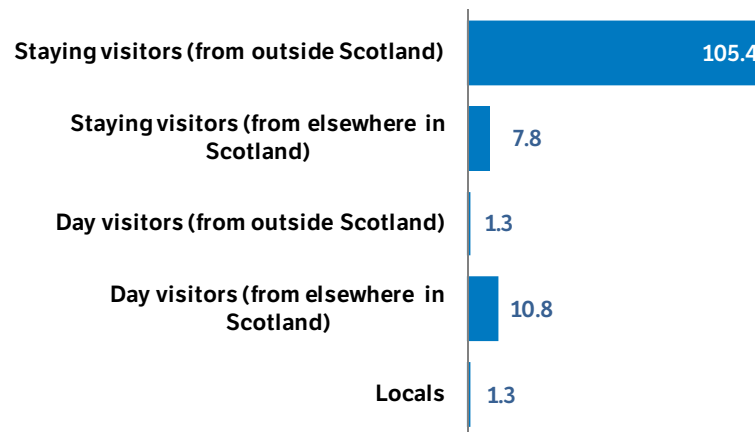
Source: BOP Consulting (2011)

Visitor types

The amount spent on accommodation already suggests that one of the major factors that generates the large economic returns from the Festivals is the number of staying, paying visitors that they attract. Figure 37 below therefore presents the net audience expenditure for Edinburgh, according to the differing visitor types that generate this sum. As can be seen, staying visitors from outside Scotland generate the vast bulk of the expenditure (83%). Although much smaller, the next largest category is accounted for by day visitors from elsewhere in Scotland, who are relatively numerous and have a high average additionality (for Edinburgh). Finally, while locals are the most numerous visitors to the Festivals overall, the fact that their expenditure is almost always not

additional, means that they contribute the least to the net expenditure (£1.3m).

Figure 37. Breakdown of net audience expenditure for Edinburgh (£m), by visitor type, at the Edinburgh Festivals, 2010



Source: BOP Consulting (2011)

The proportion of staying visitors from outside Scotland is obviously not equally distributed across the Festivals. Some of the Festivals have a much stronger local pull and orientation in comparison to others. It is this variety that is at the heart of the overall appeal of the Festivals. As Figure 38 below shows, at the upper end, fully 71% of the audience members to the Military Tattoo travel from outside Scotland to attend. Edinburgh's Hogmanay (58%), the Festival Fringe (45%) and the International Festival (32%) all attract a significant component of staying visitors.

Figure 38. Proportion of staying visitors (audience members) from outside Scotland to the Edinburgh Festivals, 2010

Festival	Staying visitors (from outside Scotland)
Science Festival	5.8%
Imagine Festival	3.7%
Film Festival	14.4%
Jazz and Blues Festival	10.8%
Military Tattoo	71.3%
Fringe	44.6%
Mela Festival	10.0%
International Festival	31.7%
Book Festival	15.1%
Storytelling Festival	23.1%
Hogmanay	57.9%

Source: BOP Consulting (2011)

5.6.5 Festival organisers' expenditure

In addition to the expenditures made by the different visitor segments at the Festival (audience, performers/delegates and press), the expenditures made by the Festivals themselves have an economic impact. Calculating Festival expenditure is, however, not straightforward and produces results that are at times, counter intuitive. The calculations are based on detailed information supplied to us by the Festivals, each of which is different.

There are several stages in this calculation, the first of which is to exclude ticket revenues from the organisers' expenditure as this has been factored into the audience calculations. This substantially reduces the expenditures allocated to the Festivals. Also, a number of the Festivals pay for performers' travel, accommodation and per diem

expenses. This too has to be subtracted from the calculations as again, it has been included within the performers' expenditure calculations. All of the above exclusions are to avoid double counting expenditure.

As with the visitor expenditure, we also have to assess the degree to which the expenditure is genuinely additional to Edinburgh and Scotland. In order to do this, we have had to firstly account for leakage. That is, for Edinburgh, to exclude the expenditures made outside Edinburgh, and for calculating the net expenditure to Scotland, to exclude any expenditure made outside Scotland.

Finally, further additionality analysis is applied to the grants provided by both public and private sector organisations to the Festivals. For the public funding received by the Festivals, we have followed SQW's additionality criteria in assuming that,

'grants provided by public bodies both locally and nationally should be discounted from the net expenditures at these geographies. It is assumed that if the Festivals had not taken place these revenues would have been used to support projects within the area.'

This means, for instance, that Edinburgh City Council grants are deemed not additional at either Edinburgh or Scotland level, as they would have been made anyway (deadweight). Creative Scotland grants are not additional at the Scottish level – as investing in the Festivals is simply displacing funds from elsewhere in Scotland to Edinburgh, but is additional to Edinburgh. Public funds from outside Scotland, such as the UK Film Council's support of the Edinburgh International Film Festival, are additional to both Edinburgh and Scotland. In terms of sponsorship from commercial sources, we again followed the additionality criteria used by SQW that are based on similar assumptions as to the public funding (these are outlined in full in the Technical Report). Lastly, only cash sponsorship has been included within the calculations, even though some of the Festivals receive significant in-kind contributions and these are acknowledged by Festivals and stakeholders to be of

critical importance. This again follows how in-kind contributions were treated in the earlier SQW study.⁶⁶

What this means is that once the expenditures that would have been double counted if they were not stripped out (the ticket revenues and the expenditure to performers for accommodation, travel and expenses at the Festival), leakage has been accounted for, and additionality applied to the sources of funding, there is very little net organisational expenditure remaining (see Technical Appendix for more details).

5.6.6 Multiplier effects

The last stage in calculating the net economic impact of the Edinburgh Festivals is to account for the secondary effects that the Festivals have on the economies of Edinburgh and Scotland. As the SQW study stated:

‘The increase in economic activity as a result of the Festivals will have two types of wider “multiplier” effects:

- supplier effect - an increase in sales in a business will require that business to purchase more supplies. A proportion of this ‘knock-on’ effect will benefit suppliers in the local economy.
- income effect - an increase in sales in a business will usually lead either to an increase in employment or an increase in incomes for those already employed. A proportion of these increased incomes will be re-spent in the local economy.⁶⁷

It is worth quoting the SQW study as we have used the same multipliers in this study (updated for inflation where required). The multipliers in both studies are based on the Scottish Tourism Multipliers, which is currently a standard methodology, that enables comparability with other major cultural and national events and initiatives that have been evaluated using these same multipliers. It also keeps the continuity

with the 2004/05 Study. There is, nevertheless, some debate about multipliers and alternative methods are being developed although they are not yet formally adopted by the Scottish Government and wider tourism industry. As is the case for this report, for future iterations the Commissioners of this report and the Festival Directors are committed to using the most widely respected and adopted methodology as it develops, in the interest of best practice.

The Scottish Tourism Multiplier Study (STMS) provides supplier and income multipliers for the tourism sector for Edinburgh and Scotland. The multipliers we have used here are the specific sectoral output multipliers for Edinburgh and Scotland. The employment multipliers come from two different sources. STMS provides information at Edinburgh level while the Scottish Input Output Tables (2000) provide information at the Scottish level.

The Festival organisers’ expenditure is, as in the SQW study, treated differently from the visitor expenditure as it is not likely to go to tourism related businesses, but instead to suppliers involved in the production of the events. This means that the non-tourism multiplier has been used for the Festival organisers’ expenditure.⁶⁸ Once the multipliers have been applied, the final overall economic impact of the Edinburgh Festivals in 2010 can be established.

5.6.7 Overall economic impact of the Edinburgh Festivals

The data presented below in Figure 39 combines all of the expenditure data from the four streams examined (audiences, performers and delegates, press and Festival organisers’). In expressing the overall economic impact of the Edinburgh Festivals, this can be done in three different ways: by showing the net difference that the Festivals make to output, income, and employment for Edinburgh and Scotland. All three are derived by applying different multipliers for each of the variables to the same net expenditures from the eleven Festivals.

⁶⁶ Any funding made by trusts and foundations has been included as additional as it is not possible to make common assumptions about deadweight and displacement as trusts and foundation funding follows more idiosyncratic rules. And there also was no indication of how this had been treated within the SQW study.

⁶⁷ SQW (2005) Edinburgh’s Year Round Festivals 2004-5 Economic Impact Study,

⁶⁸ For more detail on the multipliers used in the study, please see the accompanying Technical Report.

- Output – the net new sales produced by all the sectors of the economy as a result of the various new streams of expenditure
- Income – defined as income from wages, salaries and profits accruing within Edinburgh and Scotland
- Employment – measured in terms of Full Time Equivalent (FTE) jobs, which are defined as employment year round for more than 30 hours a week.

Over 2010, the Edinburgh Festivals are estimated to have generated:

- new output of £245m in Edinburgh and £261m in Scotland
- £59m in new income in Edinburgh and £82m in Scotland
- supported 5,242 new FTE jobs in Edinburgh and 4,917 in Scotland⁶⁹

It should be noted that the economic impact of the Festivals is disproportionately concentrated in a handful of the eleven Festivals. In particular, the Festival Fringe accounts for more than half of all the new output (58%), income (58%), and employment (57%). Together with the Tattoo, Hogmanay and International Festivals, these four account for 92% of all new output, and almost the same shares of income and employment (91% and 92% respectively). This concentration of the economic impact within these four Festivals remains consistent from the SQW study.

While the aggregate economic impact figures do not include any specific data that was collected from the Edinburgh Art Festival's audiences, many audiences are known to attend events across a number of Festivals. For instance, in 2010, audiences surveyed at the Edinburgh International Festival attended on average 2.3 events at the Edinburgh Art Festival and audiences surveyed at the Edinburgh International Book Festival 2.5 events. Moreover, as the results reported in section 5.2.2 show, the multiple Festival offer is a key factor in people's decision to come to Edinburgh during the summer Festival period and a major attraction. This data provides evidence of the Edinburgh Art

Festival's contribution to the overall economic impact of the Edinburgh Festivals reported above.

Undoubtedly, if it had been possible to obtain robust data on expenditure made by audiences that primarily attended the Edinburgh Art Festival, the overall economic impact figure would be even higher. In order to explore what this overall economic impact might be, we considered replacing key variables with averages from other similar Festivals. The key variables replaced included average daily expenditure, average nights spent in Edinburgh and Scotland, average number of events attended, average additionality per visitor type etc. In using this approach, we ensured that the Festivals that were used for comparison have a reasonably similar profile of visitors (in terms of their geographical origin), their Festival duration and multi-event nature. We therefore decided to use averages from the summer Festivals, but excluding two Festivals that did not fit this profile: the Royal Edinburgh Military Tattoo (only one event) and the Edinburgh Mela (a two-day only Festival). Using averages from the remaining four summer Festivals, we estimate that the additional net expenditure for the Edinburgh Art Festival would be in the region of £9.7m. After applying multipliers to this figure, this would produce an estimated overall economic impact for the Edinburgh Art Festival (using cross Festival averages) of £15.3m in output, £3.7m in income and 314 FTEs.

Inevitably, the above estimate for the Art Festival is a less accurate estimation process than we have used for the other Festivals and these calculations have therefore not been included in the final figures. It is important to ensure that in future iterations of the study, a robust sample from the Edinburgh Art Festival audiences can be included. In the Recommendations (section 8) we outline a number of options for improving the data collection in future years.

⁶⁹ The Scotland figures do include Edinburgh.

Figure 39. Overall net economic impact of the Edinburgh Festivals, for Edinburgh, 2010.

	Output (£m)	Income (£m)	Employment (FTEs)
Science	£0.62	£0.10	10
Imaginate	£0.38	£0.12	8
Film	£2.82	£0.91	61
Jazz	£1.29	£0.32	26
Tattoo	£34.37	£7.96	787
Fringe	£141.56	£34.26	3,006
Mela	£0.49	£0.14	11
International	£20.84	£5.18	437
Book	£5.08	£1.29	109
Storytelling	£0.18	£0.04	4
Hogmanay	£27.91	£6.35	589
Journalists (Summer Festivals) ⁷⁰			
Edinburgh	£9.46	£2.29	195
Scotland	£8.42	£2.65	161
Edinburgh	£244.99	£58.95	5,242
Scotland	£260.96	£81.85	4,917

Source: BOP Consulting (2011)

⁷⁰ It is not possible to allocate journalist expenditure at the summer Festivals to individual Festivals as they cover them simultaneously – this necessitates including them separately (otherwise the figures will not sum correctly).

5.6.8 Summary and conclusions

The study confirms and further strengthens the key message from the earlier Edinburgh Festivals Economic Impact Study: the Festivals are a major contributor to both the local Edinburgh economy and the national Scottish economy. This economic impact spreads far beyond the immediate cultural economy. In fact, the biggest beneficiary businesses in Edinburgh and Scotland are those in the tourism, hospitality, and leisure sectors. The economic impact was assessed according to the principles of the Scottish Government and HM Treasury's *Green Book*, which means that only the economic contribution which is genuinely additional has been considered. The overall factors that generate the economic impact of the Festivals are not markedly different from the previous SQW study:

- The economic impact is driven by audience expenditure, but performers and delegates and attending journalists also make significant contributions in absolute terms.
- Audience expenditure is dominated by staying visitors, as they spend more, stay for longer, and their expenditure is more likely to be genuinely additional.
- The large proportion of the overall economic impact is generated by just a small number of the Festivals.

The main difference, then, is that the overall economic contribution of the Festivals has considerably increased since the last study, and this occurred despite the cohort of Festivals being smaller within this year's research than in 2004/05.

5.7 Provide a marketing platform for sponsors and stakeholders

All of the Festivals rely on support from external stakeholders, be it public funders, individual givers, trusts and foundations or corporate sponsors. While the strategic priorities of public funders are usually relatively clear, there is much less known about some of the other supporters of the Festivals. Therefore, within the study we decided to conduct a small survey of corporate sponsors. Undoubtedly, some of these benefits would also apply to a number of other funders but it was not possible to include these within the scope of this research.

Alongside museums and visual arts organisations, Festivals are particularly well-placed to attract business sponsorship, according to recent research in this area.⁷¹ According to the management information provided by the Festivals, cash sponsorship accounts for approximately half of all external fundraising activities (48%) and approximately 6% of the Festivals' total income. Inevitably, there is variation between the Festivals and for some of the Festivals cash sponsorship accounts for a much larger proportion out of their total income (e.g. Science Festival: 33%, International Festival: 26%, Book Festival: 22%, Imagine: 13%). These figures suggest that corporate sponsors are a key stakeholder for the Festivals (and there is potential for further growth in this area). As part of the research, we therefore interrogated how sponsor organisations rated various benefits that they gained from supporting the Festivals. Figure 40 below shows the results to this question.

Research suggests that business support for the arts and cultural sector often takes the form of a 'commercial transaction' with specific and targeted objectives and outcomes for both partners.⁷² One of the ways in which businesses gain a 'return on investment' is by sponsoring organisations that have a large or very niche audience appeal.

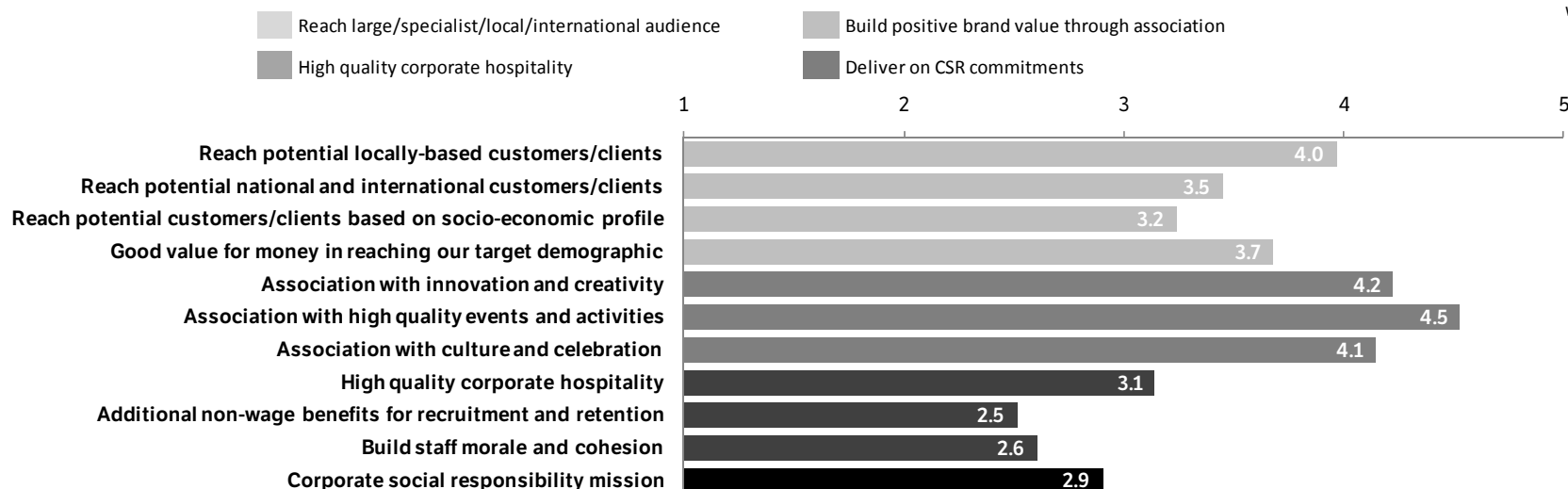
Therefore, the first outcomes area we explored is the Festivals' ability to reach out to specific target groups that are of interest to corporate sponsors. These target groups could include local residents, national or international visitors or different socio-economic groups. For instance, the Edinburgh Mela is sponsored by the Lothian and Borders Police who see this as an opportunity to showcase their employment opportunities to Black and Asian Minority Ethnic (BAME) groups, and help portray a positive image of the police and improve community relations.

The survey results suggest that reaching out to potential customers or client groups is indeed one of the most important benefits perceived by the Festival sponsors. In particular, local customers are the focus: 72% of sponsors stated that 'allowing them to reach potential locally-based customers/clients' is a very important or important benefit of the Festivals for them. Festivals sponsorship is also generally considered to provide 'good value for money' in reaching out to these target groups (58% stated that this benefit was 'very important' or 'important').

⁷¹ Arts and Business (2009) *Private Investment in Culture 2008/2009: The Arts in the 'New Normal'*, available at http://www.artsandbusiness.org.uk/Media%20library/Files/Research/pics0809/pics0809_fullreport.pdf

⁷² Arts and Business (2009)

Figure 40. Festivals' benefits for corporate sponsors (1=Not very important, 5=Very important), 2010



BOP Consulting (2011)

A common characteristic of business sponsorship in the arts and cultural sector is that businesses tend to invest in already successful institutions.⁷³ In line with such research, the most important outcome area, as revealed by the survey results, relates to image and brand association. While building a positive connection between the Festivals and their corporate organisation is a major driver for sponsors to become involved, associating themselves with a *cultural* event is less important than aspects such as high quality and innovation and creativity: 97% of responding sponsors considered a positive brand association with 'high quality events and activities' to be very important or important, whereas 82% stated the same about 'associating their organisation with innovation and creativity'. Still, 74% reported that it was important for their organisation to be associated with 'culture and celebration'.

⁷³ Arts and Business (2009)

Recent trend analysis suggests that business objectives of sponsors in the arts and cultural sector have moved away from business-to-consumer objectives (as illustrated by the first set of outcomes around reaching a specific target group) towards business-to-business models.⁷⁴ This suggests that sponsors are more interested in entertaining their clients and building relationships through corporate hospitality facilities, as provided by the cultural organisation that they support. We therefore tested whether corporate hospitality and other additional benefits are of interest to the sponsors.

While a high quality corporate hospitality offer was important or very important to just under half of all sponsors (with another 26% undecided), the research with the Festival sponsors does not necessarily mirror the trend described above. Certainly this year,

⁷⁴ Arts and Business (2009)

reaching specific consumer targets was a more important benefit that sponsors derived from the Festivals than their corporate hospitality offers. However, it is important to note that the response to this question – i.e. whether or not a sponsor considers a received benefit to be important – is very much dependent on whether, and the extent to which, the Festival offers any corporate hospitality as part of the sponsorship agreement.

The same is true for other ‘non-wage benefits’ offered by the Festivals. Overall, it seems that sponsors are less interested in internal staff-related benefits: providing non-wage benefits such as discounted tickets that help with staff retention and recruitment was rated as not important at all or not very important by 54%. Similarly, most sponsors considered ‘help with staff morale and cohesion’ not to be very important or not at all important (45%), while 27% were undecided.

In contrast to these transactional benefits where sponsors expect a direct ‘return on investment’, when businesses fund culture as part of their Corporate Social Responsibility (CSR) programmes, the objectives rarely include such a contribution to the bottom line of the business. Rather, businesses tend to follow a more charitable rationale, i.e. how they can aid the recipient organisation and therefore positively affect the public that the organisation serves.⁷⁵ In the case of the Festival research, there was no conclusive evidence with regards to this final indicator around CSR: 39% considered ‘the Festival allowing the organisation to deliver on CSR commitments’ to be an important benefit, but 42% thought that this was not important.

5.7.1 Summary and conclusions

The findings in this section suggest that brand association is the most important benefit that sponsors draw from the Festivals (however, not necessarily association with the *cultura/brand*), in addition to reaching specific, local audiences. This means that sponsors mainly support the Festivals for ‘what they are’ (high quality, innovative, creative) and ‘whom they attract’ (local residents) rather than ‘what they offer’ (corporate hospitality, discounted tickets, etc.). This also means that Festivals compete not just with other cultural events and organisations, but also with other major events such as sporting events. Having a high-quality offer and being innovative thus stand out as key criteria for attracting sponsorship support – which re-iterates the *Thundering Hooves* report’s emphasis on the importance of innovation and quality in maintaining the competitive advantage of Festivals.

⁷⁵ Arts and Business (2009)

5.8 Environmental impact: Resource depletion and climate change

5.8.1 Introduction

Unlike the outcomes and impact in the rest of the framework, the effect that hosting the Festivals has on the environment is not a question of evaluating to see whether there has been any positive change. It is instead an assessment of the negative impact that the Festivals have on climate change and resource depletion.

This is a laudable and brave undertaking. While the awareness of climate change is now widespread, the effective assessment of the environmental impact of business practices and business models is still in its infancy, and to date, has been primarily focused on the very largest businesses. The challenges faced by the Festivals in assessing and aggregating their impact makes this the most ambitious, difficult and developmental element of the evaluation. It is very much the start of a process for the Festivals and one which will develop over future years.

However, the impetus to undertake such an assessment has come from the Festivals themselves. Festivals Edinburgh has an Environmental Working Group and Strategy that has been developing ways to mitigate the Festivals' environmental impact, underpinned by a commitment to improving the monitoring and measurement of the environmental impact of the Festivals. It works to identify and develop common approaches to issues and emerging good practice, to embed awareness and to build capacity within the Festivals to tackle their environmental footprint. More recently, it has led the formation of a new partnership, Creative Carbon Scotland, to develop and extend this practice across the wider cultural sector in Scotland.

For this evaluation, we have worked closely with the Festivals Edinburgh Environmental Working Group to try and dovetail the work of our evaluation with their ongoing efforts. The aim has been much more about how to improve the Festivals' self assessment of their environmental impact than demonstrating and communicating this to the outside world. This is because, until the Festivals fully develop a way

of measuring their emissions and waste, the picture will only be partial and incomplete.

5.8.2 The specific challenge of the Festivals

At the heart of the Festivals are shared, communal experiences which are premised on bringing larger numbers of people together in one place at one time, often to see performers, artists and speakers from across the globe.

The Festivals also have a very irregular output. For most of the year, their output is very modest – consisting of a small core staff that is engaged in putting together the programmes and developing marketing and promotional activities and so on. The Festivals then explode into life for a very short period, sometimes as brief as a weekend, and never for longer than five weeks. As a result, the Festivals' environmental impact is similarly irregular.

The Festivals then have very different arrangements for staging the Festivals. A number of the Festivals stage the events in (predominately) outdoor spaces that they themselves are responsible for running (the Mela, the Book Festival, the Tattoo and Hogmanay). But the majority are staged in venues that are not run by themselves, but by the individual venue owners. At the extreme is the Festival Fringe, in which well over 2,000 shows are performed across the city in every kind of venue imaginable.

5.8.3 Overall approach

Fortunately, there are some existing precedents for monitoring carbon emissions and waste that can be applied to the idiosyncrasies of the Festivals. Specifically, Julie's Bicycle is an organisation that exists to help the music and cultural sectors to become more environmentally sustainable. One element of their work has focused on live music and Festivals. They have therefore developed bespoke approaches to track emissions and waste for venues and Festivals.

For this reason, the Festivals Edinburgh Environmental Working Group has been working with Julie's Bicycle to help develop approaches to monitoring and (ultimately) improving the environmental performance

of the Festivals and component venues that host their events. Together, the Festivals Environment Working Group and Julie's Bicycle have developed a 'Green Venue' initiative which recognises those venues that are monitoring, measuring and reducing their environmental impact. Julie's Bicycle have also developed a set of online tools (the 'IG Tools') that allows a range of different cultural organisations (e.g. venues, Festivals, etc.) to calculate their own carbon footprint.⁷⁶

The tools are designed for a range of activities and events. In some cases, the complex context of the Festivals (e.g. the mix of indoors and outdoors, permanent and temporary sites) means that data needs to be input into more than one tool (e.g. Festival, office, touring) in order to obtain the final carbon footprint figure. These tools, however, represent a cost (and time) effective solution to the problem of measurement for the Festivals in the future, when they will have to undertake this assessment themselves. A more detailed discussion of the work undertaken in this area is included in the Technical Report.

5.8.4 The determinants of the Festivals' environmental impact

The framework for assessing the contribution of the Edinburgh Festivals to climate change and resource depletion was developed through several meetings and discussions with representatives of the Festivals Edinburgh Environment Working Group and Julie's Bicycle. It is presented below in Figure 41.

There is an overall two-part structure to the framework. This is based on identifying those emissions and waste streams over which the Festivals have **direct** control, and those **indirect** emissions that they do not. This is an internationally recognised principle recommended by organisations like the Carbon Trust.

For the Festivals, direct emissions are generated through year-round office use, any directly managed site/venue use during the Festival itself, and any business travel undertaken by staff and volunteers over the year. Indirect emissions are generated by all the other components that make up the environmental impact of the Edinburgh Festivals, but over which the Festivals themselves are not in direct control. This is a larger and diverse set of factors as it effectively encompasses the Festivals' upstream and downstream supply chain.

Upstream linkages that produce waste and emissions are related to the transportation and installation of equipment, seating, sets, lighting rigs and equipment, and the travel to Edinburgh of artists and crew for productions. The downstream supply chain linkages concern the emissions and waste generated by non-directly managed venues that host Festival events. Lastly, a potentially large contribution to the negative environmental footprint of the Festivals is generated by the transport usage of the large audiences attending the twelve Festivals across the year.

This framework was developed to be forward-looking, aspirational and developmental. That is, it was known at the outset that the Festivals would not be able to supply data relating to every category within the framework. The important step is to get each Festival reporting what they can gather already, but also to provide an outline of what else they need to collect in order to improve their assessment in subsequent years.

Each Festival therefore submitted the environmental data that they have to-date. In addition, estimates for the carbon emissions of visitors to the Festivals have been generated from the visitor survey.

⁷⁶ The Festivals and pilot venues are using these and other tools (for instance, the SMEasure tool developed by Oxford University which tracks energy performance over time) to monitor their emissions and energy use. In so doing, the participating organisations are also developing best practice and ensuring a common approach to the measurement process in this crucial first year.

Figure 41. Framework for assessing the contribution of the Edinburgh Festivals to resource depletion and climate change, 2010

1. Direct Emissions	1.1 Festival Offices + directly managed venues		1.2 Staff / Volunteer business travel	
	<p>Resource use</p> <ul style="list-style-type: none"> - Electricity consumption (kWh) - Gas Consumption (kWh) - Water use (m3) <p>Waste</p> <ul style="list-style-type: none"> - Waste to landfill (bags or Tonnes) - Waste to recycling (bags or Tonnes) <p>Outdoor venues</p> <ul style="list-style-type: none"> - Diesel use (litres) - Gas / propane use (kg) - Mains electricity use (kWh) - Mains gas use (kWh) 		<p>Business travel only</p> <ul style="list-style-type: none"> - Taxi (miles OR journeys) - Car (miles OR journeys) - Train (miles OR return journeys) - Short haul flights < 5hrs (miles OR single journeys) - Long haul flights > 5hrs (miles OR single journeys) 	
2. Indirect Emissions	2.1 Non directly-managed venues*	2.2 Audience	2.3 Productions	2.4 Performers + Crew
	<p>Resource use</p> <ul style="list-style-type: none"> - Electricity / gas consumption (kWh) - Water use (m3) <p>Waste</p> <ul style="list-style-type: none"> - Waste to land-fill - Waste to recycling <p>Outdoor venues</p> <ul style="list-style-type: none"> - Diesel use (litres) - Gas / propane use (kg) - Mains electricity use (kWh) - Mains gas use (kWh) 	<p>Travel to Edinburgh</p> <ul style="list-style-type: none"> - Distance Travelled - Mode of transport (Car/Bus/Train/Plane) <p>Travel within Edinburgh</p> <ul style="list-style-type: none"> - Bike / Car / Bus / Train 	<p>Festival operations</p> <ul style="list-style-type: none"> -Transportation and installation of equipment, seating, sets, lighting rigs and equipment <p>Operations of contracted production companies / artists</p> <ul style="list-style-type: none"> - Shipping of performers' sets and equipment when paid for by the Festival 	<p>Travel to Edinburgh</p> <ul style="list-style-type: none"> - Distance Travelled - Mode of transport (car / bus / train / plain)

* Emissions of non directly managed venues will not be attributed to the Festivals overall emissions in 2010 due to lack of information and lack of control over reductions. The ambition will be to include these emissions in future years, creating a new baseline

Source: BOP Consulting (2011)

5.8.5 Additionality

It should be noted that for visitor emissions, we have applied some of the same principles of additionality as in the calculation of the wider economic impact (see section 5.6.4 above). That is, we have only included the emissions of those visitors whose visit is genuinely additional, based on their response to the additionality question of ‘what would you have done had you not attended the Festivals?’ This seems to be logical and consistent in that, if visitors state that they would have gone somewhere else in Edinburgh, travelled to work in Edinburgh, then the emissions would still have been made regardless of whether the Festivals were taking place or not. This means, of course, that the pattern of environmental impact mirrors that of the economic impact: the vast majority of locals are excluded from the calculations as their visits are almost always not additional. The **net** emissions that are attributable to the Festivals are mainly generated from visitors from outside Scotland.

Where we have departed from the principles of additionality used within the economic impact calculations is geography. The environmental impacts of the Festivals cannot meaningfully be distinguished between the impact they have at the Edinburgh level, and at the Scotland level. Once emissions have been generated, they are simply in the atmosphere; we therefore only present one set of figures.

5.8.6 Capturing the base data: direct emissions and waste

Festival offices

Figure 42 below contains the existing data held across the Festivals related to their own office use year-round. The difficulty of obtaining even the base data required to calculate environmental impact is demonstrated by the fact that only half of the Festivals were able to supply estimates for their electricity usage, five for gas, and only two for water usage. Data on waste is more complete, with eight Festivals submitting estimates for both waste sent to landfill and recycled waste.

Figure 42. Existing data on Festival offices, held by the Edinburgh Festivals, for calculating their environmental impact, 2010

Factor contributing to emissions	Volume	Unit
Electricity	907,711.8	kWh
Natural Gas	1,336,747.3	kWh
Water	4,937.6	m ³
Waste to landfill	924,870.0	litres
Waste to landfill	924.9	tonnes
Waste to recycling	865,665.0	litres
Waste to recycling	865.7	tonnes

Source: Edinburgh Festivals/BOP Consulting (2011)

Highlighting the challenges faced in collating and assessing the impact, the data for waste was provided in three different measures (bin bags, litres, and tonnes). To further complicate the waste calculations, there are different sizes of bin bags used by different Festivals, and some Festivals have had to estimate waste based on the number of times that waste is collected. This obviously provides an upper bound for how much waste the Festival office produces, but for it to be accurate, the bins would have to be 100% full on each occasion that they are emptied. In order to make the data comparable, we have therefore converted data reported as bin bags and tonnes into litres, as shown in Figure 42.

Some of the Festivals have been able to provide us with estimates of staff business travel. This information has been also included in the estimation of the emissions produced through the Festival offices.

Outdoor Festival sites

Three of the four Festivals that directly operate and run outdoor venues (the Edinburgh Mela, the Military Tattoo, the Book Festival and Edinburgh’s Hogmanay), were able to supply data on some of the indicators aggregate below in Figure 43.

Figure 43. Existing data on outdoor Festival sites, held by the Edinburgh Festivals, for calculating their environmental impact, 2010

Factor contributing to emissions	Volume	Unit
Diesel	18,778.0	litres
Butane	0.0	kg
Propane	0.0	kg
Electricity	160,435.0	kWh
Natural Gas	0.0	kWh
Water	0.0	m ³
Waste to landfill	25,730.3	litres
Waste to recycling	75,019.1	litres

Source: Edinburgh Festivals/BOP Consulting (2011)

5.8.7 Capturing the base data: indirect emissions and waste

Non directly-managed venues

It was never going to be achievable to assess the environmental impacts of all of the participating venues across the twelve Festivals within this year's study. However, through the Green Venue initiative and the work the Festivals and venues are doing with Julie's Bicycle, it is hoped that this will be achievable in the near future. Festivals did provide the number of venues that were centrally involved in delivering their programmes of events and activities, to try and place some scope around what the size of the task is to involve these venues in starting to monitor and mitigate their environmental impact in future years. It is perhaps encouraging that, for the majority of the Festivals, the number of venues in which the bulk of the programme is staged is relatively small. The exceptions are the Festival Fringe (259) and Jazz and Blues (49), where there is clearly more work to be undertaken.

Audience travel

Non-local visitors to the Festivals were asked in the survey about their journey to the Festivals – specifically the length of their return trip in miles, and the mode of transport that they were using for each leg of the trip. The aggregated data from across the twelve is presented in Figure 44 below. Within the eleven Festivals⁷⁷, there is significant variation in terms of transport methods and miles travelled. Those Festivals that have relatively high proportions of visitors from outside Scotland, such as the Military Tattoo and the Festival Fringe, also have the highest proportions of visitors travelling to Edinburgh by plane.

Figure 44. Means of transport to/from Edinburgh and average miles travelled, for additional visitors to the Edinburgh Festivals, 2010

Type of transport	%	Distance return journey (average miles, after additionality)
Bus/Coach	5.72	198.09
Motorbike/Scooter	0.04	150.00
Boat/Ferry	0.39	933.33
Cycle	0.03	0.00
Train	18.81	239.25
Taxi	0.25	34.71
Car	20.21	213.05
Plane	13.07	1,473.01
Other	0.55	233.03
Local	40.93	
Total	100	

Source: BOP Consulting (2011)

⁷⁷ The figures for the Art Festival have been excluded from this calculation given that this information was obtained from the audience survey.

In addition to the journey to and from Edinburgh, we also collected data from audiences about their travel within Edinburgh as part of their trip to the Festivals. These figures have been included in the final CO₂e emissions estimations in Figure 45 and Figure 46 below.

Performers and crew

We asked the Festivals to report the number of trips that artist made to Edinburgh and back, as well as the journeys made within Edinburgh. This information has been included in the estimations in Figure 46 below under the category artists' travel.

Production

This section relates to the transport of sets, seating, marquees, lighting and sound rigs, and so on. It is clearly a larger factor for some Festivals than others. However, getting reliable and consistent data on this area (e.g. the number of trucks, size in tonnage, miles travelled, or the transportation of film canisters) has not proved possible this year and this area will require development in future years.

5.8.8 Conversion to carbon

The data collected from the Festivals and from the audience has been inputted into the online IG Tool with the help of staff at Julie's Bicycle. This converts the different factors into CO₂ equivalent (CO₂e) generated by audience travel to and from the Festivals.⁷⁸ As noted above, the values shown in Figure 45 reflects the composition of the audience according to visitor type (staying, day visitor, locals) in two main ways:

- staying visitors travel further and are more likely to use carbon intensive forms of transport such as air travel
- the journeys made by staying visitors are more likely to be genuinely additional trips.

Finally, the size of the relative contribution of the audience to carbon emissions across all the Festivals is obviously also effected simply by the size of the audience.

Once these factors are borne in mind, it is not too difficult to understand why the audience to the Festival Fringe generates the highest amount of CO₂e (largest Festival, lots of staying visitors), and the Military Tattoo is the next highest (very high component of staying visitors, particularly from overseas). The smaller Festivals that also attract a predominantly local audience, such as Imagine, the Edinburgh Mela, and the Jazz and Blues Festival, concomitantly generate much smaller amounts of carbon from audience travel.

Figure 45. CO₂e emissions generated by audiences', including travel to and from; and within Edinburgh, 2010

Festival	Audience Travel (tonnes CO₂e)
Science Festival	107
Imagine	50
Film Festival	143
Jazz Festival	137
Tattoo	13,576
Fringe Festival	22,538
Mela	27
International Festival	3,502
Book	368
Storytelling	46
Hogmanay	1,270
Total	41,764

Source: BOP Consulting (2011)

⁷⁸ As the Festivals took place while the evaluation framework had not yet been completed, we do not have data on return trips to and from Edinburgh for the Science Festival and Imagine.

The IG Tool also calculates one CO₂e variable for all the other remaining contributory factors to the Festivals' carbon footprint, which essentially covers the Festivals' own operation (there are no fields for the supply chain). However, there is a huge variation in the level of environmental data that we have been provided with across the twelve Festivals. It is therefore not appropriate to present the figures as a comparison, so the data contained within Figure 46 below shows the absolute amounts of CO₂e across the twelve Edinburgh Festivals. In 2010, this was:

- 44,130 tonnes CO₂e equivalent in absolute terms
- and 1.34 kg CO₂e per ticket sold in relative terms.

The audience travel to Edinburgh and back and within Edinburgh account for 95% of all emissions. This is in part because this data has been collected more comprehensively across all Festivals, in comparison with the other sources of emission.

Figure 46. CO₂e emissions from the Edinburgh Festivals, 2010

Source of emission	Total: In tonnes	Average: per ticket in kg
Office	897	0.028
Energy	788.2	
Waster	11.2	
Water	5.2	
Business travel	92.4	
Outdoor event	144.3	0.012
Energy	138	
Waste	6.3	
Water	0	
Audiences' travel	41,764	1.2
To Edinburgh and back	21,510	
Within Edinburgh	20,254	
Artists' travel	1,325	0.1
Total	44,130	1.34

Source: Edinburgh Festivals/Julie's Bicycle/ BOP Consulting (2011)

It should be noted that this represents a **very significant under estimate** of the actual carbon footprint of the Edinburgh Festivals. In particular, missing data on the operations of the non-directly managed venues is a major missing factor, as is, to a lesser extent, the missing data from some of the Festivals' offices. For this reason, it is not yet worth speculating on the major determinants of the Festivals' environmental footprint. At present, the bulk of it is accounted for by audience travel to and from Edinburgh – but no firm conclusions can be drawn until more of the missing data is added in subsequent years.

5.8.9 Summary and conclusions

The final impact area considered as part of the research is the most challenging for the Festivals, as it consists of assessing the impacts on the environment. Attempting to tackle this issue is a laudable and brave undertaking. The Festivals have already shown leadership in their development of a cross-Festival Environment Strategy. The strategy aims to build awareness and capacity within the Festivals, as well as identify and develop approaches and practice (such as the Green Venue accreditation scheme) to tackle their environmental footprint. Nevertheless, the process of measuring the negative environmental contribution is still difficult and has inherent challenges for organisations' communication agendas.

The Festivals – and the cultural and tourism sectors more generally – are still at an early stage in terms of their thinking around environmental sustainability. This year's research has therefore concentrated on ways of assessing and monitoring the current level of impact (rather than measuring a process of change, as in the other impact areas). It must be recognised that there are still significant gaps in the Festivals' data (including the impact of most Festival venues, performers and production crew) which means that the figures presented in the report are a considerable underestimate of the overall carbon footprint of the Festivals. From what is known to-date, audiences (and in particular staying visitors) account for the biggest proportion of the impact, but further work is needed in this area.

6. Sustainability of the Festivals

As discussed above, the *Thundering Hooves* report set out the strategic framework to ensure that the competitive edge of Edinburgh's Festivals was maintained over time. This included a set of recommendations for strategic partners and funders of the Edinburgh Festivals, but it also outlined actions that the Festival organisers have to take in order to ensure a sustainable future for their Festivals.

It is clear that the success of the Festivals is very closely linked to a sound financial basis of the organisers, but a focus on economic sustainability alone would be too narrow. Rather, thinking about sustainability requires a broader definition. The Edinburgh Festivals subscribe to this broader notion of sustainability, as exemplified by the action research they are currently carrying out with Julie's Bicycle to reduce the Festivals' environmental impact.

In 1987, the Brundtland Commission of the United Nations defined sustainability as follows:

“Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.”

This definition is normally the starting point for any discussion of sustainability. The Commission goes on to elaborate that achieving sustainability requires the reconciliation of environmental, social and economic demands – the so-called ‘three pillars’ of sustainability. The last two decades since the Brundtland Commission have witnessed a growing effort by governments, companies and third sector organisations to grapple with how to change their organisations to make them operate more sustainably. Part of this fundamental transition has been developing ways to measure and report on how organisations are progressing towards their sustainability goals. This has given rise to the term ‘triple bottom line’ accounting – where organisations report

progress on their social and environmental performance, as well as their financial results. This can be done in a variety of ways, such as a balanced scorecard approach,⁷⁹ or through a Social Return on Investment (SROI) perspective.

While these approaches offer a method for a comprehensive assessment of these three pillars, in particular the latter is very resource intensive for the organisations and would have gone beyond the remit of this study. However, as part of the evaluation framework we started developing the beginnings of a measurement process for the Festivals, in form of a self-assessment process that looked at some of the areas relevant to the sustainability agenda. This was in line with recommendations of the *Thundering Hooves* report to start establishing such forms of self-assessment. Unlike the rest of the evaluation which focuses on collecting information on outcomes and impacts of the Festivals' activities, this section considers the processes through which the Festivals bring about this change.

Although these sustainability issues underpin all of the Festivals' activities and, to a certain extent, can be seen as a pre-condition of achieving the outcomes described above, this is perhaps also the most forward-looking and developmental section. On the one hand, this is because the Festivals need to continue to put in place processes for acting on the various sustainability issues. This is obviously true for the environmental work that is being carried out with the Festivals Working Group and Julie's Bicycle, but also for some of the other sustainability areas. The EventScotland Sustainable Sport and Event Toolkit⁸⁰ provides a number of suggestions of how to develop such processes. While the main focus of the toolkit is on green issues, it does also cover other sustainability issues such as local community engagement, fair-trade supply-chains or diversity issues in HR practice. On the other hand, further work is needed by the Festivals to put in place systematic processes for collecting data on these issues.

⁷⁹ See, for instance, the Sigma Sustainability Scorecard, developed by SIGMA in the early 2000s, a partnership between the British Standards Institution, AccountAbility and Forum for the Future.

⁸⁰ EventScotland, IOC and Vancouver 2010 (2010) *Sustainable Sport and Event Toolkit*, http://www.eventscotland.org/files/ES3024_SSET_DIGITAL_2.pdf

The sections below provide a short discussion of the various sustainability outcomes and present as much data as is available at the current stage from the Festivals.

6.1 Achieve a sustainable and diversified portfolio of funding sources

The first outcome is mainly about economic sustainability, which can be understood in terms of the Festivals' ability to base themselves on a balanced financing and business model that is in line with their organisational objectives. According to Arts and Business, all cultural organisations should aim for a balanced 'tripod' of income comprising: (less) public funding, (more) private funding and (more) earned income in order to ensure economic sustainability over time.⁸¹ This becomes even more important as the recent and future cuts in public funding to the arts are expected to leave a significant deficit in the sector's finances.⁸²

Across the Festivals there is a huge variety of funding models, which are linked to the differences in the Festivals' aims and objectives, as well as to differences related to the art form sectors. Accordingly, the proportion of income from the different sources varies significantly across the different Festivals.

Overall, the average proportion of earned income out of the Festivals' total income is 51%. However, at the individual Festival level this share fluctuates from 1% for the Edinburgh Art Festival (85% of whose events are free) to 96% for the Royal Edinburgh Military Tattoo. This percentage is considerably higher than the average in the cultural sector: according to a survey of more than 1,000 cultural organisations carried out by Arts and Business, earned income accounts for 32% of all income within the cultural sector.⁸³ For most of the Festivals, the largest part of earned income is generated through ticket sales. It also includes

other income streams such as merchandising, catering operations or other ancillary services.

The second measure of a sustainable portfolio of funding that we suggest looking at is the share of public funding within the overall budget and across how many public funders this income is distributed. Across the Festivals, public funding accounts for 36% of all income, but again with variations between 1% and 83%. Depending on the nature of the Festivals and their respective art form sectors, some Festivals are always going to require public funding. From a sustainability view, it is therefore equally important to understand where this public funding is coming from as Festivals with a high proportion of public funding and who are relying on one or two funders are at particular risk.

Across the Festivals, there is a relatively high reliance on the key funding organisations: the proportion of income that is accounted for by the top two public funders across the Festivals is 31% (compared to 36% of public sector funding overall). This suggests a potential threat to the economic sustainability of the Festivals, as they rely heavily on continued support from two main organisations, City of Edinburgh Council and Creative Scotland. There are two notable exceptions: both the Edinburgh International Film Festival and the Edinburgh Mela have a high proportion of public funding overall (69% and 74% respectively), but this is spread across a much bigger range of funding organisations, and the two biggest supporters account for a considerably smaller amount of the overall income in comparison (39% and 42% respectively).

It is worth noting that Festival audiences do consider them to be a good use of public investment. At two of the Festivals, the Edinburgh Mela and Edinburgh's Hogmanay, we asked audiences whether they felt that the City of Edinburgh Council's financial contribution to these Festivals was a good use of public money. This statement was strongly endorsed by the respondents: almost half of the audiences (48%) felt that it was a 'very good use' of public money, in addition to another 39% who thought it was 'good use'.

Finally, private funding, including corporate sponsorship and private donations, makes up the third pillar of the sustainable funding 'tripod'. This accounts for 13% of the combined Festivals' total income,

⁸¹ Mermiri, Tina (2010) *Private investment in culture: the arts in and post recession*, Presentation for Arts and Business

⁸² Mermiri, Tina (2010) *Arts philanthropy: the facts, trends and potential*, Report for Arts and Business

⁸³ Mermiri, T. (2009)

with individuals festivals private funding ranging from 5% to 30% of their total income. The global financial crisis over recent years has seen the competition for increasingly scarce private funds grow substantially and it is important that this area is closely monitored and strategies to sustain and, where possible increase private funding, continue to be developed.

In addition to purely looking at the proportion of external fundraising income, the EventScotland *Sustainable Sports and Events Toolkit* suggests seeking and monitoring the number of ‘sustainable sponsors’ as another measure. Sustainable sponsors are defined as having a commitment to sustainable practices such as low waste and low carbon solutions, ethical sourcing and sustainable operations, or a track record of community involvement. This might be an area that the Festivals might want to consider in the future.

6.2 Innovate in product development

Attracting income, in particular earned income and private investment, is closely related to attracting audiences. As the *Thundering Hooves* reports sets out, this is dependent on:

”achieving and sustaining a consistent international quality threshold for all Festivals in order to ensure that the brand value of the Festivals is sustained. [...The Festivals] need to have the resources to invest in [...] commissioning, development and presentation of work that is new to their target audiences or is interpreted and presented in new ways.”

Innovation in programming is therefore at the core of the sustainability agenda. Many of the Festivals do strive to present work that cannot be seen elsewhere or has never been seen before and do so successfully. For instance, the Edinburgh International Festival nearly always negotiates an exclusivity clause with their performing artists, which does not permit them to perform in the UK in the three months before and after the Festival.⁸⁴ Another example is the Edinburgh

International Film Festival which requires all the Festival films to be premieres – at the very least at UK, if not at European or International level.

In order to assess the extent to which the Festivals are investing in innovative programming, we asked them to provide us with the figures for how much expenditure they make on artists or performers that is related to new work and premieres.⁸⁵ Inevitably, this does not capture the full amount of investment as, for instance, it does not include the above example of the Edinburgh International Film Festival as no ‘artists’ are involved at the Festival level. It is rather one of a ‘basket of indicators’, that also includes the total number of new works and premieres presented (see section 4.1 above). Across the Festivals, 39% of artist expenditure is related to new work and premieres. Again, there is significant variance across the Festivals.

6.3 Actively engage with audiences and communities

Engagement with audiences and communities is one of the central elements of sustainability. Arguably, engagement is more challenging than simply looking for audience or community attendance or participation, as it covers a broader (and deeper) range of activities through which audiences are actively engaged in the planning and delivery of cultural services.

The 2008 White Paper *Communities in Control: Real People, Real Power* sees community engagement as a way of ‘empowering’ people. However, over and above such general considerations, there are other reasons why cultural institutions have an interest in engaging with their audiences and the communities. In a position paper, the Museums, Libraries and Archives Council in England set out four reasons why community engagement and empowerment are intrinsically important to cultural organisations as they:

⁸⁴ Exceptions are made in rare cases such as to permit large scale international orchestras to perform at the BBC Proms in London.

⁸⁵ Given that the Edinburgh Festival Fringe does not pay any performers, it is excluded from the figures reported in this section.

- ensure that cultural organisations are inclusive and fit for purpose;
- help the sector to develop a locally appropriate offer;
- contribute to the performance management and improvement agendas; and
- lead to a wide variety of positive outcomes for communities.⁸⁶

Finally, recent research from the CASE project shows that there is a positive relationship between people having a sense of influence on the provision of cultural opportunities, and their probability of attending and art event or visiting a library or a museum.⁸⁷

At a basic level, audience and community consultation is one means of involvement. At present, only a minority of Festivals were able to report on the number of people consulted on their programming. Across those five Festivals who did report figures, 6,331 audience members or community representatives were involved. However, these figures also suggest that there are different levels of consultation: some of the Festivals provided the number of audience survey responses or feedback cards in this section – which enable audiences to comment on, and make suggestions for, various elements of the Festival including programming. This consultation form provides a way of engaging a relatively large number of people. Other Festivals reported much smaller figures that suggest that they used more in-depth consultation, e.g. through focus groups or conversations with community representatives.

The empowerment agenda, which is very much in line with the ideas of the current coalition government's Big Society concept, goes beyond consultation-based engagements towards getting people involved in the design and running of services. An example that fits within this agenda is the Festivals Edinburgh Innovation Group, which aims to deliver a number of 'Open Innovation' platforms to co-design products and services with users, such as crowdsourcing ideas websites and 'jam' events. Another way in which the Festivals engage audiences and community representatives in their development and

governance is through their Friends Groups or board representation. Again, less than half of the Festivals report figures for this, but there are at least 85 members of the public and community engaged in the Festivals' development and governance.

Looking at the Friends schemes more generally, there is a greater number of Festivals who are able to provide information on this. Across the Festivals more than 16,000 individuals are members of such schemes and friends' donations account for close to half a million pounds.

Furthermore, volunteering is seen as another way of engaging with the community. As mentioned above, the Festivals provide more than 600 volunteering opportunities, of which at least 190 are taken up by Edinburgh residents.

6.4 Develop sustainable human resources

Another element which is generally considered as part of an organisation's social sustainability efforts is its approach to human resources. From a sustainability perspective, there are a number of factors that should be considered by the Festivals.

The first outcome is to develop and act upon equality and diversity principles in relation to the Festivals' workforce. This relates both to the more usual demographics used in equality and diversity analyses, such as the proportion of staff from an ethnic minority background or with a disability, and the proportion of staff drawn from the local area.

The information collected by the Festivals on their temporary staff and volunteers' ethnic origin is very inconsistent. Festivals are better able to report on their permanent staff, although several note that they do not monitor these figures consistently. According to these figures, only 1% of permanent staff posts is taken up by staff from a non-white ethnic background. This compares to 4.1% of the total Edinburgh

⁸⁶ MLA (2009) *Briefing Paper on the Community White Paper*.

⁸⁷ CASE (2010)

population.⁸⁸ However, a low ethnic representation is characteristic of cultural sector employment in Scotland more generally: the 2009 Skillset Creative Industries Employment Census reported that 2% of the Scottish creative workforce being from a BAME background.⁸⁹ Moreover, none of the Festivals report on permanent staff who consider themselves to have a disability.

The evidence base is much stronger with regards to staff members' geographical origin. Across the Festivals, 62% of paid staff posts (321.7 FTEs, including both temporary and permanent) were taken up by local residents. Volunteers, however, were less likely to be drawn from the local community: only 31% of volunteers are from Edinburgh.

The second area is concerned with staff development, including ensuring progression routes for their staff. While the study did not collect any information for permanent staff on this area, as mentioned above, approximately half of the volunteers and two thirds of temporary staff received training as part of their involvement with the Festivals.

6.5 Use fair trade practice in procurement and supply chain management

Another area that should be considered from a social sustainability perspective is the extent to which Festivals have and observe fair trade procurement policies. There are two areas in particular that could be included:

- Develop and act upon policy for contractors that ensures they observe human and economic rights (measured through the total value of contracts that observe human and economic rights, and the proportion that this represents out of the total value of such contracts)

- Develop and act upon a policy for the ethical sourcing of materials and products (measured through the total value of materials and products ethically sourced, and the proportion that this represents out of the total)

Apart from the Royal Edinburgh Military Tattoo (who indicate that all of their contracts observe fair trade principles), at present none of the Festivals collect data on this area systematically.

6.6 Measure and reduce waste and energy consumption

The final area of the 'triple bottom line' is concerned with environmental sustainability area. As mentioned before, while it is still at a developmental stage, the Festivals have begun to collaborate and lead in this area.

The first outcome that should be looked at in this section is the development and implementation of an environmental policy. Indeed, through the Environment Working Group, the Festivals have developed and are now acting on a collective environmental policy. Moreover, environmental policies are also in place at the individual Festival level. As part of the implementation of these policies, the Festivals have started working towards reducing their utilities at the Festival offices, as well as the emissions and waste by visitors at the Festival venues. For initial figures, see section 5.8.

The second outcome is to develop and implement a 'Green Venue initiative' for Festival venues. This has been carried out together with Julie's Bicycle. According to initial figures provided by six of the Festivals, 27% of all Festival events took place within a venue that was participating in the 'Green Venue' scheme in 2010.

The final area is related to audience travel. As mentioned above, at the core of the Festivals are shared, communal experiences which are premised on bringing larger numbers of people from across the globe together in one place at one time. However, encouraging audiences to attend and visit while using more carbon efficient transport is an important factor in reducing the Festivals' carbon footprint. The Festivals

⁸⁸ According to figures from the 2001 census.

⁸⁹ Skillset (2009) *2009 Employment Census. The results of the seventh Census of the Creative Media Industries*, available at http://www.skillset.org/uploads/pdf/asset_14487.pdf

already try to raise awareness among audiences to use more environmentally friendly means of transport. In 2010, approximately 20% of audiences travelled to/from Edinburgh using public transport (train, bus or coach). These percentages only relate to those journeys made by audiences that are considered to be 'additional' (e.g. 47% of audiences were local visitors and hence did not travel to/from Edinburgh).

The above figures only provide a first benchmark against which to measure progress over the next few years. This is partly related to the fact that the outcome itself (reduction of waste and energy consumption) implies a process over time, however, the Festivals also need to continue improving their environmental monitoring tools as discussed in section 5.8.

7. Medium to long-term impacts

The above sections describe the short-term outcomes of the Edinburgh Festivals. These are the most important areas on which the Festivals have a direct impact on. The findings from the research enable the organisers and stakeholder organisations to make a rounded statement about the value of the Edinburgh Festivals. In order to strengthen the evidence base, the Festivals will need to repeat the impact assessments over time.

There are, however, likely to be a number of broader effects related to the Edinburgh Festivals which have not been included in the impact assessment. This is either because they occur at a much later stage (and hence could not be measured within the research period), or because they were beyond the scope of the current study. A number of these broader effects that have been identified within the research are described below.

Increase engagement of Edinburgh residents

While the research results show that some of the Festivals attract a high number of local residents as a proportion of their overall visitors, there is no doubt that there is a significant proportion of Edinburgh residents who do not currently attend the Festivals. These 'non-users' constitute a potential target market for the Festivals and one of the medium to long-term impacts would thus be to increase the proportion of Edinburgh residents who do attend the Festivals. Inevitably, not all of these non-users have the same attitude towards the Festivals. Indeed, there are likely to be people with a range of opinions and attitudes, including:

1. People who do attend cultural events in Edinburgh generally but do not attend the Edinburgh Festivals

2. People who consider the Festivals to have an 'option value', i.e. they like the Edinburgh Festivals to exist because they want to keep the option to attend in the future
3. People who place an 'existence value' on the Festivals, i.e. they do not wish to attend the Festivals (neither at present or in the future), but like to know that the Edinburgh Festivals exist for others and for the range of benefits that they deliver (e.g. on the local economy or other residents)
4. People who have a negative opinion about the Festivals

This list is by no means exhaustive but it does illustrate the differences of opinion and attitudes that exist among non-users. Undoubtedly, the groups higher up in the list (e.g. 1 and 2) are more likely to become future audiences of the Edinburgh Festivals.

At present, it is not possible to quantify these differences among the 'non-users' of the Festivals in Edinburgh. While the Festivals might be able to extract some useful information on the first group – through the ongoing Vital Statistics research carried out by The Audience Business for a large number of cultural organisations in the city – the Festivals do not have enough information on any of the other three groups.

A relatively simple way of starting to collect information on non-users would be to introduce four questions into the City of Edinburgh Council's Residents' survey. The first two questions would simply ask residents whether or not they have attended the Festivals

- In the last 12 months
- In the last five years (this would be to test for any threshold effects).

The next question should try to gain further information on the attitudes of non-attendees. In order to do so, we would suggest re-introducing the question which was in the previous Residents' Survey until 2007, i.e. 'Do you believe the Festivals make Edinburgh a better or worse place to live, or do they make no difference?'

Finally, we suggest that all respondents are asked a question about whether they consider the Festivals to be ‘good use of public investment’ (see section 6.1).

By including these additional questions, the Festivals would be able to longitudinally track the proportion of locals who actually attend the Festivals, but also have a better idea about which groups already have a positive attitude towards them and who would hence be more likely to be gained as future audiences.

Increase year-round cultural participation in Edinburgh

The second medium to long-term impact that we would suggest looking at is whether or not the Edinburgh Festivals indeed drive cultural participation all year-round. The latest Scottish Taking Part Survey (2008), which measures cultural attendance and participation across Scotland, shows that Edinburgh residents had the highest propensity in the country to have attended and/or participated in any arts or cultural activities during the last twelve months (93% of all respondents).⁹⁰ However, this finding alone does not allow any conclusions. The Taking Part Report also states that demographic and socio-economic variables, in particular level of education, have an impact on people’s attendance and participation.

Therefore, we would suggest carrying out some additional analysis on the Taking Part data set. This would attempt to control for the demographic and socio-economic factors in order to see whether Edinburgh residents indeed participate in cultural activities more frequently than other places in Scotland. Relatedly, one might also identify a ‘control’ city with a similar demographic and socio-economic profile which does not have a Festival offer such as Edinburgh’s, to see whether there are, again, any differences in cultural attendance and participation rate.

Increase positive labour pool effects

The final suggestion is to look at any impact that the Festivals may have on labour pool effects. Within the sponsors survey, we asked the organisations one question that relates to a specific element of such labour pool effects. We asked sponsor organisations to rate various benefits that they gained from supporting the Festival, including ‘providing staff with additional non-wage benefits that help with recruitment and retention’, with 1 being ‘not important at all’ and 5 being ‘very important’. The evidence of this question is inconclusive: across the relatively small sample of 35 sponsor organisations from seven Festivals, the average is 2.51, and responses vary for different Festivals. It should be noted that this question is only in part an indicator for positive labour pool effects as the response is very much dependent on whether or not the Festival offers any such ‘non-wage benefits’ as part of the sponsorship agreement with the Festival.

In addition to the above, there is a much wider range of perceptions and attitudes towards the Edinburgh Festivals that could be explored in more detail with businesses. These include both positive (e.g. the extent to which the rich cultural offer through the Festivals is perceived as a factor in attracting and retaining talented staff to Edinburgh) and negative issues (e.g. the extent to which business are affected by traffic congestions, price inflation etc.).

We would suggest that a cross-section of local businesses could be surveyed to explore these issues in more detail.

⁹⁰ Scottish Arts Council (2008) *Taking Part in Scotland 2008. Full Report of Survey Findings*, <http://www.scottisharts.org.uk/resources/publications/research/pdf/Taking%20Part%2008%20Final%20Full%20Report.pdf>

8. Recommendations for repeating the impact assessment

8.1 Introduction

In addition to providing a first year of baseline data, the evaluation has also been tasked with providing a repeatable methodology that can be, in the main, owned and run by the Festivals themselves, in conjunction with Festivals Edinburgh. Part of this task will be to provide hand-over materials that contain the approaches and tools developed and used for the first year, with guidelines on how these can be run by the Festivals themselves. This amounts to an evaluation toolkit for the Festivals going forward. Below, we outline the key recommendations regarding the different stages of the evaluation process.

8.2 The evaluation process

Figure 47 below provides an overview of the evaluation process that has been developed and run over the year. It illustrates the different elements of the process, the tools and approaches that have been used to-date, and who we think needs to be centrally involved at each stage of the evaluation. We also suggest some additional/alternative tools and methods that might be considered in 2011/12 to further refine the process and make it easier to be repeated (these appear on the diagram beneath a dotted line).

8.3 Evaluation framework

In the evaluation toolkit, we make suggestions on where we think the indicator set can be reduced. In this first year, it was important to not rule

out possible indicators before empirically testing them. Now this has been achieved, there are some indicators that we can suggest dropping from the framework for a number of reasons:

- redundancy – they were not ultimately used in the analysis
- high non-response – in comparison to other indicators
- not required for particular cohorts – this would have to be made in conjunction with changes to this stage of the evaluation process (see section 8.5 below).

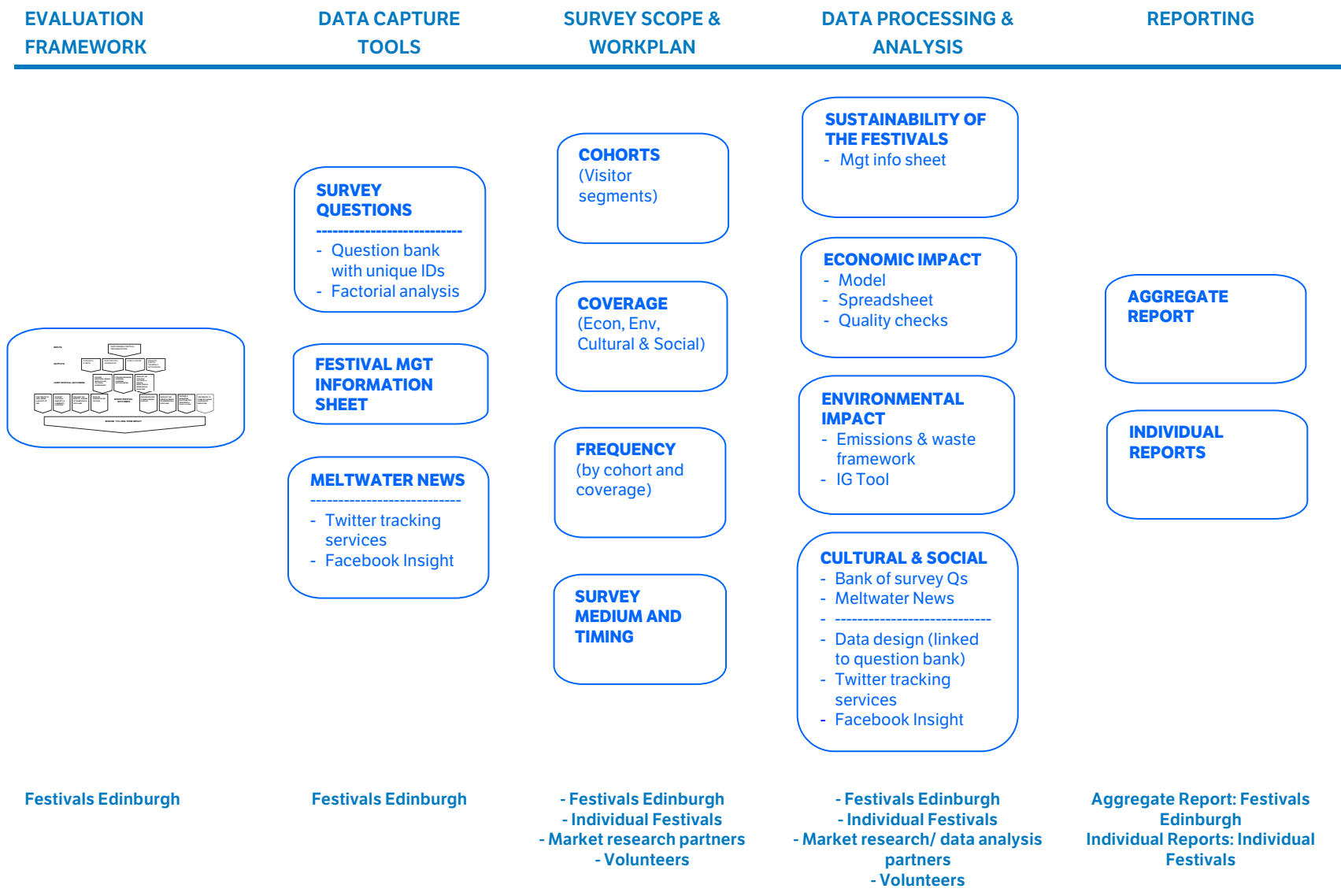
The Festivals may also have a view on which indicators are more or less useful to them, which should also be taken into account. Alternatively, additional factorial analysis could be undertaken. This would analyse whether there are any complementarities among related indicators and would enable potential redundant variables to be identified and eliminated.

8.4 Data capture tools

Three main data capture tools have been used within the evaluation: a set of survey questions have been designed for a range of different Festival cohorts; a spreadsheet designed to elicit the main management information from the Festivals themselves; and the online news monitoring tool, Meltwater News. Going forward:

- **Consider developing the survey questions into a survey ‘bank’**, once the final indicator set has been agreed, with questions given unique identifiers to aid analysis and aggregation.
- **Investigate other social media monitoring tools** – the surveys illustrate the increasing importance of social media as a means that performers and journalists use to communicate messages about the Festival. This could be further enhanced through investigating the myriad tracking and monitoring tools that are now available (some free, some pay services) for Twitter, and the smaller number available for Facebook, such as Facebook Insight.

Figure 47. Evaluation process for the Edinburgh Festivals, with suggestions for refinements and alternatives for 2011



Source: BOP Consulting (2011)

8.5 Survey scope and workplan

Coverage

- **Consider the cost benefit of running the economic impact analysis every year** – particularly for the smaller Festivals. The unintended consequences of applying a principle of additionality to the economic impact calculations is that almost all locals' expenditure is removed from the subsequent calculations. As some of the smaller Festivals attract a majority local audience, many questions are thus taken-up on the survey with variables that are ultimately discarded in the analysis. Similarly, the management information required to analyse the organisational expenditure is also significant. Both of these factors means that there is a high overhead to running the economic impact calculations – but for very little positive return for the smaller Festivals.
- **Improve the coverage of free events across the Festivals** – free events are an important feature of many of the Festivals. However, surveying them is more difficult – for instance, they cannot be sent an online survey as this can only be disseminated to ticket buyers drawn from box office records. This means that either (i) other means need to be used to disseminate online surveys (e.g. flyers/postcards given out at free events advertising the survey) or (ii) assisted in-person interviews are used to capture the views of audiences at free events, but this is obviously more resource intensive than online, self-completion surveys. Where Festivals are already running assisted visitor surveys – and wish to include audiences to free events within their economic impact calculations (e.g. the Edinburgh International Festival) – this should be extended to visitors to free events.
- **Devise a better method for surveying visitors to the Edinburgh Art Festival** – whose programme consists of many free events (so no ticketed audience records to send online surveys) and some specially commissioned public art installations (again, difficulties assessing visitor numbers, let alone being able to survey them).

The distribution method for this year's survey was to send it out to visitors who had already taken part in assisted on-site visitor research, resulting in a very low sample size overall. However, given the survey was only distributed to approximately 500 people, the response rate of 65 was actually relatively high. This method was unsatisfactory for two reasons: it is too small to produce statistically significant results and it is highly likely that the sample will not be representative – as it is based on people who have already taken part in a previous significant market research exercise (i.e. it suggests that those answering a second survey will be disproportionately dedicated attendees, with a correspondingly different behaviour profile). The Art Festival should explore ways in which it can capture data on audiences to the Festival organised or commissioned events. For instance, the Festival could explore the possibility of obtaining 'opt-in' data from the venues that participate in the Festival, in order to further build their database. Lastly, flyers/postcards given out at Art Festival events advertising the survey may improve the response rate, and any assisted visitor surveys that are to be run by the Art Festival in future could be extended to include the key variables necessary for assessing economic impact.

Frequency

- **Change the focus of the evaluation on alternate years** – as space on surveys is limited (and was pushed to the absolute limit this year), consideration should be given to having a thematic focus every year (e.g. one year looking at cultural and social, the next looking at economic and environmental).
- **Consider using 2011 as a year of consolidation and development** – use the next year of the Festivals to address key outstanding challenges identified through this study. In particular, focus strongly on improving the Festivals monitoring of their environmental impact, including working with partners, such as venues and production crews. This would also extend to working closely with Julie's Bicycle to improve and adapt the IG Tool so that it is a more relevant and detailed tool. This recommendation would also include issues noted above with respect to the Edinburgh Art Festival.

Cohorts

- **Consider reducing the scope of the non-audience stakeholders** to be surveyed – this impact assessment has either introduced new cohorts into the Festivals’ research programmes, or significantly extended the coverage of these stakeholders in terms of the depth and range of information asked for. The Festivals may wish to review if these all need to be included every year, for every type of impact. For instance, the economic impact of journalists is relatively small and may not be justified in terms of cost benefit, similarly with performers at the smaller Festivals. This year’s study has produced some interesting findings in relation to, in particular, the Festivals’ temporary staff, but also the volunteers across the Festivals. However, it may not be necessary to survey these groups to the same extent every year, though we would suggest that the Festivals certainly improve the management information that they hold on both groups.

Survey medium and timing

- **Increase the capacity of the smaller Festivals to undertake survey distribution and management** – this is essentially about ensuring that there are enough volunteers/temporary staff available to administer any assisted surveys, but also that they have the necessary skills to undertake the task. This implies that some resource needs to be expended on recruitment, training and management. It may well be more efficient to coordinate this overall process across the Festivals and build-up a pool of dedicated volunteers – this already happens to a small degree, but only in an ad hoc fashion (through the personal connections of the volunteers).
- Specific recommendations on the timings of surveys will be made in the evaluation toolkit.

8.6 Data processing and analysis

- **Increase the capacity of the smaller Festivals to undertake data processing** – the same capacity issues that exist regarding survey distribution are also relevant for data processing, as volunteers and temporary staff may also be required to input data for those Festivals using self completion paper questionnaires. When collating

responses from their own surveys in preparation for analysis and aggregation with other Festivals’ data, Festival staff/volunteers also need to be made aware of what format this should take.

- **Consider retaining a specialist external contractor for managing the aggregation of all Festival data** – while the impact assessment process has been designed as far as possible to be one that is owned by Festivals Edinburgh and the Festivals themselves, the task of aggregating the data from 12 Festivals and several different cohorts is very significant. This applies both to the volume of data and analysis, but also to the expertise that this requires, particularly in relation to the economic impact analysis and quality checking data.
- **Consider developing a more detailed data design for the cultural and social outcomes** – linked to the development of a question bank as outlined above, this would improve the speed and ease of the aggregation and management of this data. This is a discrete but specialist task that would require an external contractor.

8.7 Beyond the Edinburgh Festivals

The impact assessment framework and process developed for the Edinburgh Festivals has a potentially wider application for some of the other 280 Festivals that take place across Scotland.

In its new Corporate Plan 2011-2014, Creative Scotland has announced its ambition for ‘Scotland [to be] a year-round Festival nation recognised as one of the top ten places in the world to visit for culture.’ As this implies, Festivals are at the heart of this vision, and a key element of Scotland’s tourism product.

Assessing how well the ambitions for Scotland’s Festivals are being realised will take a variety of forms of assessment. Although there are clear differences between individual Festivals, our study shows that there are also many commonalities.

In particular, while the economic and environmental impacts of Festivals differ largely in terms of their scale; the challenges to assessment are largely operational (how to capture audiences’ to free events, how to deal with multiple Festival going, etc.), rather than

conceptual (what constitutes economic impact). A key breakthrough of our study is to show that even in the areas of cultural and social impact, there are a range of 'generic outcomes' that may be utilised in the assessment of Festivals' impacts. We would therefore suggest that consideration is given to the transferability of the Edinburgh Festivals' evaluation framework and process to other Scottish Festivals, in conjunction with how this might map onto existing resources such as the eventIMPACTS toolkit. Moreover, the evaluation framework could potentially also have applicability internationally, as there are already a number of Festival clusters worldwide that relate themselves to Edinburgh's successful model.

9. Appendices

9.1 Festival descriptions

EDINBURGH INTERNATIONAL SCIENCE FESTIVAL (APRIL)

The Edinburgh International Science Festival is a celebration of all the wonders, inventions and innovations of the world of science and technology. It is the world's first science Festival and Europe's largest. Each year hundreds of scientists and technologists share their passion with the public through a programme of engaging, interactive and accessible talks, workshops, shows and exhibitions.

Family friendly events, fun activities for children and groundbreaking insights from industry experts attract curious minds of all ages and backgrounds. From the science of ghosts, chocolate and laughter to the legacy of Charles Darwin and theories of Richard Dawkins the Festival never ceases to be fun, fascinating and thought provoking.

For two weeks every Spring, the city becomes a playground with events happening in over 20 venues including the lush surrounds of the Royal Botanic Gardens, the awe inspiring grandeur of McEwan Hall and the children's favourite the City Arts Centre. This celebration of ideas, inventions and innovations is designed to illuminate the magic and mysteries of our world, giving children experiences that are inspiring and confidence building and adults a new perspective on the world around us.

BANK OF SCOTLAND IMAGINATE FESTIVAL (MAY)

Edinburgh's Bank of Scotland Imagine Festival has established itself as an indispensable part of the international theatre scene for children and young people. It is a rare offering of award-winning productions from all over the world, all aiming to thrill, provoke and entertain. The Bank of Scotland Imagine Festival provides a rich performing arts programme to entertain and inspire audiences, from the very young to

teenagers and beyond. The Festival has been part of a movement which has helped lift the indigenous theatre scene to world-class levels.

The Festival Director chooses a programmed balanced to reflect the best and most exciting from around the world and places them alongside the very best in home grown work. It is an event which puts its audience first, but is also a meeting place for artists, producers and promoters to meet.

EDINBURGH INTERNATIONAL FILM FESTIVAL (JUNE)

Born alongside Edinburgh's International Festival in 1947, EIFF was one of the world's first international film Festivals, and helped define the type of event that has since become so pivotal to film culture in nations all over the world.

EIFF has developed into a crucial business hub for the UK and international film industry, a key attraction for Edinburgh, and one of the world's best-loved audience Festivals. With an emphasis upon new talent, discovery, and innovation, EIFF's vibrant programme of films and events combines a commitment to audience edification and pleasure with a strong ongoing stake in the development of the Scottish, UK and International film industries.

EDINBURGH JAZZ AND BLUES FESTIVAL (JULY)

Edinburgh Jazz and Blues Festival takes place at the end of July. The Festival consists of around 100 concerts over a ten day period, attracting audiences of 40-50,000, primarily from the local area. The programme aims to be international in outlook, spanning the earliest jazz forms to the thriving creativity of today, distinctively promoting all styles of jazz with equal interest and commitment, and championing creativity on the spot in Edinburgh during the Festival.

EDINBURGH ART FESTIVAL (AUGUST/SEPTEMBER)

An international showcase for the visual arts, Edinburgh Art Festival takes over the city every August with a 4 week programme of exhibitions, artist talks, special events and tours. Featuring internationally renowned artists alongside work by emerging talent and a special programme of new commissions, Edinburgh Art Festival sees

national institutions join with artists' studios and pop-up venues to share the best the visual arts have to offer.

Founded in 2004, Edinburgh Art Festival is among the youngest of the city's Festivals. The Festival has grown to include a programme of new commissions for public spaces and non-gallery spaces in the city.

EDINBURGH FESTIVAL FRINGE (AUGUST)

Every year thousands of performers take to a multitude of stages all over Edinburgh to present shows for every taste. From big names in the world of entertainment to unknown artists looking to build their careers, the Festival caters for everyone and includes theatre, comedy, dance, physical theatre, musicals, operas, music, exhibitions and events.

The story of the world's largest arts Festival dates back to 1947, when eight theatre groups turned up uninvited to perform at the (then newly formed) Edinburgh International Festival. Not being part of the official programme of the International Festival didn't stop these performers – they just went ahead and staged their shows anyway. Year on year more and more performers followed their example and in 1959 the Festival Fringe Society was created in response to the success of this growing trend.

The Society formalised the existence of this collective of performances, provided information to artists, published the Fringe programme and created a central box office. These core services are at the heart of what the Fringe Society continues to provide for Fringe companies to this day. The Edinburgh Festival Fringe is an entirely open access Festival and the Festival Fringe Society is proud to include in our programme anyone with a story to tell and a venue willing to host them, and exists to support, advice and encourage all those performers, before, during and after their visit to the world's greatest arts Festival.

The Festival Fringe Society doesn't run any Fringe venues, or pay fees to any Fringe artists. For the purposes of this impact study, the research has been undertaken by the Fringe Society and it is this management information that has been used. In 2010 an estimated 21,000 performers took to stages in over 250 venues, performing over 40,000 performances of 2,453 shows

ROYAL EDINBURGH MILITARY TATTOO (AUGUST)

The Royal Edinburgh Military Tattoo has its origins in the post-world war austerity of the mid 1940s when the City gave its Lord Provost, Sir John Falconer, the go-ahead for his vision to create a world focused Festival of music and drama. In 1949, the first formal link between Edinburgh Corporation and Scottish Command took place with two military displays, one in Princes Street Gardens and the second on the Esplanade of Edinburgh Castle. The first Edinburgh Military Tattoo took place in 1950 and since then British Military Bands and Pipes and Drums as well as military contingents and civilian acts from over 50 countries around the world have entertained the Tattoo audience. Her Majesty The Queen bestowed a Royal title on the Tattoo in January 2010.

The Tattoo's backdrop is the spectacular Castle at Edinburgh which stands majestically between the medieval Old Town and the Georgian New Town in the middle of the UNESCO World Heritage Site. The focus is always on the power of music, dance and song to transcend boundaries. Each year the Tattoo is seen by a live audience in Edinburgh of 220,000 people, a UK television audience of 6 million and by 150 million people around the world. There are 25 evening performances on the Esplanade and there are occasional opportunities for outreach events elsewhere in Scotland. In 2005 and 2010 the Tattoo was performed in Sydney, Australia and in 2000 it travelled to Wellington, New Zealand.

EDINBURGH INTERNATIONAL FESTIVAL (AUGUST/SEPTEMBER)

Long ranked as one of the most important cultural celebrations in the world, the Edinburgh International Festival was established in 1947. It presents a curated programme of classical music, opera, theatre and dance of the highest international standard to an international audience for three weeks in August/early September every year. Artists and companies are invited by the Festival Director to participate, and these invitations are recognised as a prestigious and high profile opportunity for artists across the globe.

The founders of the International Festival believed that the Festival should 'provide a platform for the flowering of the human spirit'.

They also recognised that, if the Festival succeeded in its artistic ambitions, it would create a major source of revenue for Edinburgh and for Scotland. This founding principle - that a world class cultural event which brings together people and artists from around the world, would also generate significant cultural, social and economic benefits for Edinburgh and Scotland - is as relevant today as it was over 60 years ago.

In turn, the city and the country also play a crucial role in the success of the Festival and its residents are among its best ambassadors. The Festival works year round with local people to further cultivate an enthusiasm for the arts and a breadth of cultural understanding through its outreach work.

On average the Festival presents over 160 performances involving over 2,500 artists to an audience of up to 400,000 each year. Performances are staged across the city in Edinburgh's large scale theatres and concert halls. The spectacular productions and concerts selected can present up to 300 people on stage and play to audiences of up to 3,000 in any single performance. The Festival continues to prioritise work that would not otherwise be seen in the UK, providing unique experiences for many in its audience. It is also committed to ensuring it remains an experience anyone can access, reflected in its programme, access policies and pricing structures.

EDINBURGH INTERNATIONAL BOOK FESTIVAL (AUGUST)

The Edinburgh International Book Festival is the largest public celebration of books in the world, with 800 authors in 750 events over a 17 day period. Every August the Book Festival takes place in a purpose-built, tented village in Charlotte Square Gardens – a Georgian Square in the west end of Edinburgh's city centre. This green leafy space holds eight venues and has attracted such big literary names as Philip Pullman, Chuck Palahniuk, Margaret Atwood and Joyce Carol Oates, in addition to Nobel Prize winners including Al Gore, Seamus Heaney, Harold Pinter and Joseph Stiglitz. Each year, writers from all over the world gather to become part of this unique forum in which audience and author meet to exchange thoughts and opinions on many subjects including some of the world's most pressing issues in a series of topical debates. The

Children's Programme, which forms a key part of the Book Festival, has grown to become a leading showcase for children's writers and illustrators, incorporating workshops, storytelling, discussions, author events and book signings.

Edinburgh International Book Festival aims to showcase the highest artistic and literary quality, bringing leading thinkers and writers together to inspire and be inspired; to bring international authors to Scotland, many of whom may be relatively unheard of, while simultaneously providing the single most important annual exhibition of Scottish literature, authors and publishing. The Children's and Schools' programmes, along with the Outreach programme, which takes talented children's authors and illustrators to meet young people across Scotland in their own communities, aims to broaden the horizons and fire the imaginations of children and young adults.

The Book Festival runs its own independent bookselling operation – all proceeds from the sale of books are invested back into the running of the Book Festival, a not-for-profit charity organisation which annually raises 80% of its own funds.

EDINBURGH MELA FESTIVAL (AUGUST)

The Edinburgh Mela was founded in 1995 to celebrate and profile Scotland's minority ethnic communities through "Mela" a traditional South Asian form of Festival. It has grown significantly into Scotland's largest celebration of cultural diversity through the arts.

Edinburgh Mela is a vibrant multi-cultural annual event based at the Leith Links over a weekend as part of Edinburgh's unique summer Festival period. Mela offers a colourful and exciting mix of family entertainment and fantastic food alongside a programme of high-quality international performances. As well as hosting international artists, Mela increasingly commissions and co-produces original work. The Mela takes a lead in creating culturally diverse outdoor work in Scotland that contributes to the evolving contemporary Scottish cultural identity.

The Mela is staged on an enclosed outdoor Festival site which boasts a "Big Top" with a covered music stage programming leading names from the British Asian pop scene, DJ's, Hip Hop and Bhangra

artists as well as musicians, choirs and bands from all over the world. A more intimate “Garden Stage” features an extraordinarily rich mix of traditional musicians, international artists and dance companies. In addition, the outdoor performance spaces present street theatre, circus and large-scale performances.

Edinburgh Mela is a celebration for and with diverse communities. It is also a vibrant and welcoming international event that is a platform for multi-cultural contemporary Scotland.

SCOTTISH INTERNATIONAL STORYTELLING FESTIVAL (OCTOBER)

The Scottish International Storytelling Festival is Scotland’s annual celebration of traditional and contemporary storytelling. The Festival brings together audiences from across Scotland and beyond for entertaining and inspiring live storytelling performances. The programme features thought-provoking talks, workshops and discussions from local, national and international Storytellers sharing their experiences, tales and their culture.

The Festival is curated by the Festival Director. Storytellers are selected from Scotland, the UK and around the world. Storytelling traditions are presented primarily for adult audiences alongside events aimed at families and young people.

EDINBURGH’S HOGMANAY (DECEMBER – JANUARY)

Edinburgh’s Hogmanay is the biggest New Year Festival in the world. “Hogmanay” is the traditional Scottish name for New Year’s Eve where people would gather in town squares to wish each other “Happy New Year” and welcome friends and even strangers into their homes. Since 1993, Edinburgh has developed this warm, emotional evening in the middle of the cold dark winter in to a huge four-day celebration of Scottish culture and hospitality where an audience of over a quarter of a million people from all corners of the globe are welcomed and entertained in Scotland’s capital city: the “Home of Hogmanay”.

Edinburgh itself becomes a theatre for a four-day programme of events in the city’s boulevards, squares, parks and indoor venues; many events are free to the public. On Hogmanay night itself, the city centre is closed,

except for ticket holders and, transformed into an arena with several stages and giant screens, the iconic castle and the Old Town as its backdrop. The Street Party plays to an audience of 80,000 ticket holders (with tens of thousands in adjacent areas and vantage points to see the fireworks) in an electric atmosphere of anticipation and euphoria, an international audience, amazed and suffused by the warmth and friendliness of the Scots. The Street Party culminates in two simultaneous, massive firework displays broadcast on television to an international audience of billions. The programme comprises contemporary and traditional music, from current to classical, from jazz to DJs and often features music from around the world. The programme also regularly features international street theatre and events range from sporting activities to spiritual, from poetry to pop.

9.2 Meltwater News analysis search terms

The following search terms were used for the analysis of media coverage through Meltwater News:

- Edinburgh International Science Festival – “Edinburgh International Science Festival” “Edinburgh Science Festival”
- Bank of Scotland Imagine Festival – “Bank of Scotland Imagine Festival” “Edinburgh Imagine Festival” “Scottish Children’s Theatre Festival”
- Edinburgh International Film Festival – “Edinburgh International Film Festival” “Edinburgh Film Festival”
- Royal Edinburgh Military Tattoo – “Royal Edinburgh Military Tattoo” “Edinburgh Military Tattoo” “Edinburgh Tattoo”
- Edinburgh Mela – “Edinburgh Mela Festival” “Edinburgh Mela”
- Edinburgh Jazz and Blues Festival – “Edinburgh Jazz & Blues Festival” “Edinburgh Jazz Festival”
- Edinburgh Art Festival – “Edinburgh Art Festival”
- Edinburgh International Festival – “Edinburgh International Festival”
- Edinburgh Festival Fringe – “Edinburgh Festival Fringe” “Edinburgh Fringe Festival”
- Edinburgh International Book Festival – “Edinburgh International Book Festival” “Edinburgh Book Festival”
- Scottish International Storytelling Festival - "Scottish International Storytelling Festival" "Edinburgh Storytelling Festival" "Scottish Storytelling Festival"

- Edinburgh’s Hogmanay – “Edinburgh’s Hogmanay” “Edinburgh Hogmanay” “Edinburgh New Year”

We also used the generic search term ‘Edinburgh Festival’:

- ‘Edinburgh Festival’ but not ‘Edinburgh International Festival’ or ‘Edinburgh Fringe Festival’ or ‘Edinburgh Festival Fringe’ or ‘Edinburgh International Book Festival’ or ‘Edinburgh Jazz and Blues Festival’ or ‘Edinburgh Art Festival’ or ‘Edinburgh International Science Festival’ or ‘Edinburgh International Film Festival’ or ‘Edinburgh Storytelling Festival’

In addition, we used the following search terms for the comparator Festival searches:

- Glastonbury Festival – “Glastonbury Festival” “Glastonbury 2010”
- Liverpool Capital of Culture programme: “Liverpool08”, “Liverpool 08”, “Liverpool 2008”
- BBC Proms – “BBC Proms”, “Albert Hall Proms”, “Proms Broadcast BBC”
- Wimbledon – “Wimbledon Tennis”, “Wimbledon Championships”, “Wimbledon 2010”, “Wimbledon AELTC”, “Wimbledon Lawn Tennis”
- T in the Park - “T in the Park”, “Festival Balado”, “Tennent’s T in the Park”

Sydney Festival – “Sydney Festival”, “Festival First Night Sydney”, “Sydney Festival Garden”, “Sydney Festival Beck’s Bar”

9.3 Data description

CORE FESTIVAL OUTCOMES

Indicator/Question	Cohort	Source	Question responses	Total responses in survey	Non-response rate (%)
- Instilled a sense of wonder about life					
Q To what extent do you agree: instilled a sense of wonder about life	Audience survey	Sc, Art, Int	1,410	1,518	7.1
- Audience's satisfaction with event (child / child -proxied from parent/ carer)					
Q: To what extent do you agree with the following statement(s): "For my children, this visit has...made no difference to their enjoyment of [the cultural form/ subject] "	Audience survey	Imag, Book	462	501	5.1
- Provided new and interesting topics for socialising					
Q To what extent do you agree: The [film/performance] has given me the opportunity to have an enjoyable social experience	Audience survey	Film, Jazz, Art, Tattoo, Int, Book	9,830	10,521	6.6
- Audience/participant rating of quality vs comparable events					
Q How would you rate the quality of the event(s) against other comparable events?	Audience survey	All Festivals	12,084	14,384	16.0
	Teacher survey	Imag, Int, Book, Story	129	143	9.8
- Children's rating of quality (proxied from parent/carer)					
Q What score would the children in your party give this event/activity(s) out of 10?	Audience survey	Sc, Imag, Book	829	886	6.4
	Teacher survey	Int, Book, Story	91	106	14.2
- Attending delegates/performers' satisfaction with event					
Q Overall, how satisfied were you with [...] Festival from a performers/delegates/guest speaker's perspective?	Delegates/performers survey	Film, Mela, Fr, Book, Story	531	629	15.6
Q Please tell us how satisfied or dissatisfied you were with the...	Delegates/performers survey	Imag.	31	3	9.7
- Attending journalists perception of quality, inc. vs competitors					
Q: To what extent do you agree: Had a high quality programme of events	Journalist survey	Art, Jazz, Int, Book, Mela, Tatoo, Film, Hogmanay	214	218	1.83

- Increase audiences' enthusiasm in cultural form/subject					
Q To what extent do you agree: Enthused me about [science]	Audience survey	Sc.	237	254	6.7
Q To what extent do you agree: made no difference to my enthusiasm and interest in [visual/perf arts/military/lit/storytelling]	Audience survey	Art, Tattoo, Int, Book, Story	8,871	9,588	7.5
- Enable discovery of new genres/talent/cultural form					
Q To what extent do you agree: Given me the opportunity to discover new [talent, styles or genres]	Audience survey	Film, Jazz, Fr, Book, Hogm	4,755	5,229	9.1
Q: To what extent do you agree: Showed too few films that showcase new talent, genres and styles	Journalist survey	Film	90	93	3.2
- Assessment of uniqueness of events					
Q How unique was/were the Festival event(s) from any other events that you've experienced?	Audience survey	All	12,356	14,384	14.1
Q How unique was/were the Festival event(s) from any other events that you've experienced?	Teacher survey	Imag, Int, Book, Story	125	143	12.6
Q: To what extent do you agree :lacks a distinctive vision that sets it apart from other [cultural form] Festivals.	Journalist survey	Art, Int, Fringe, Book, Jazz, Mela, Hogmanay	266	274	2.91
Q: To what extent do you agree: Presents work that can easily be seen in other parts of the UK	Journalist survey	Art, Int, Jazz	59	62	4.83
- Participate in 'must see' event/experience					
Q To what extent do you agree: My visit/s has/have given me the chance to participate in a must-see event.	Audience survey	Film, Jazz, Tattoo, Fr, Int, Book, Hogm	12,144	13,041	6.9
- Awareness of international dimension of Festival					
Q Are you aware that [...] Festival showcases productions from around the world?	Audience survey	Imag	134	136	1.5
Q Are you aware that [...] Festival showcases productions from around the world?	Teacher survey	Imag	37	37	0.0
- Children gain access to international quality work (proxied from parent/teacher)					
Q To what extent do you agree: It is important for my child to see international productions	Audience survey	Imag	132	136	2.9
Q To what extent do you agree: It is important for the children in my group to see international productions	Teacher survey	Imag	37	37	0.0
Q To what extent do you agree: It is important for me to have the opportunity to see [new film releases/authors/productions] from	Audience survey	Film, Jazz, Art, Int, Book, Story	3,771	4,093	7.9

around the world.

- Audience/Volunteers/Temp staff gain access to performance/artists they would otherwise not see

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Q To what extent do you agree: My visit today has enabled me to see [performances/storytellers/authors etc] that I otherwise would not get to see	Audience survey	Jazz, Art, Mela, Tattoo, Fr, Int, Story, Hogm	10,689	11,327	5.6
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Q To what extent do you agree: Provided me with access to [performances/events etc] that I otherwise would not get to see	Volunteer survey	Jazz, Art, Mela, Int	131	135	3.0
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- Widened audiences' access to cultural form (proxied by journalists)

Q To what extent do you agree: The Festivals helped widening audiences' access to the art form	Journalist survey	Arts, Int, Fringe, Jazz, Mela, Tatroo,	223	226	1.32
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- Increase enjoyment of subject/cultural form (adult or child - proxied from parent/teacher)

Q To what extent do you agree: Increased my enjoyment of [science/performing arts etc.]	Audience survey (adult)	Sc, Jazz, Tattoo	6,915	7,229	4.3
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Q To what extent do you agree: Made no difference to my enjoyment of [arts]	Audience survey (adult)	Fr, Hogm	2,343	2,585	9.4
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- Increase interest in subject/cultural form (adult or child)

Q To what extent do you agree: Made no difference to my [enthusiasm and] interest in [jazz and blues music, visual arts etc]	Audience survey (adult)	Jazz, Art, Tattoo, Int, Book, Story	9,188	9,950	7.7
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Q To what extent do you agree: For my child...increased their interest in [theatre and performing]	Audience survey (for child)	Imag, Book	97	97	0.0
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Q To what extent do you agree: For the children in my group...increased their interest in [theatre and performing, literature etc]	Teacher survey	Imag, Int, Book, Story	413	443	6.8
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- Improve understanding of subject/cultural form (adult, child, volunteer)

Q To what extent do you agree: Made no difference to my understanding of [science/art form]	Audience survey (adult)	Sc, Jazz, Art, Fr, Int, Hogm	4,041	4,465	9.5
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Q To what extent do you agree: Made no difference to my knowledge and understanding of the [film/film industry; jazz music etc]	Volunteer survey	Film, Jazz, Art, Int	106	109	2.8
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Q To what extent do you agree: Made no difference to my knowledge and understanding of the [arts etc]	Temp staff survey	Fr, Int, Book, Story, Hogm	143	147	2.7
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- Improve understanding of social or environmental issues					
Q To what extent do you agree: Provided me with new insights on life, human relations or social issues.	Audience survey (adult)	Film, Art, Tattoo, Fr, Int, Book, Story	11,646	12,511	6.9
- Support the Curriculum for Excellence (stakeholder outcome)					
Q To what extent do you agree: Has been a useful addition to the curriculum for excellence	Teacher survey	Imag, Int, Book, Story	132	143	7.7
Q To what extent do you agree: Has increased their understanding of curriculum areas	Teacher survey	Book, Story	85	91	6.6
- Enhance children's creativity (proxied from parent/teacher)					
Q To what extent do you agree: Made no difference to their creativity	Audience survey	Sc, Imag, Book	840	886	5.2
Q To what extent do you agree: Made no difference to their creativity	Teacher survey	Imag, Int, Book, Story	134	143	6.3
- Stimulate children's imagination (proxied from parent/teacher)					
Q To what extent do you agree: For my child...stimulated their imagination	Audience survey	Imag, Book	477	501	4.8
Q To what extent do you agree: Stimulated their imagination	Teacher survey	Imag, Book, Story	120	128	6.3
- Improve children's engagement with school learning (proxied from teacher)					
Q To what extent do you agree: increased their engagement with school learning	Teacher survey	Imag, Int, Book, Story	129	143	9.8
- Improve children's peer relationships (proxied from teacher)					
Q To what extent do you agree: made no difference to their peer relationships	Teacher survey	Imag, Int, Book, Story	134	143	6.3
- Problem-solving					
Please tell us what you think about the following statements: I now feel better able to problem-solve	Workshop Survey	Science	109	109	0.0
- Working with deadlines					
Please tell us what you think about the following statements: I now feel more confident working towards a deadline	Workshop Survey	Science	109	109	0.0
- Decision-making					
Please tell us what you think about the following statements: I now	Workshop Survey	Science	109	109	0.0

feel better able to take difficult decisions

- Team work

Q Please tell us what you think about the following statements: I now feel more confident working with children of other ages and young adults

Workshop Survey	Science	109	109	0.0
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- Contacts with other performers & delegates

Q To what extent do you agree: offered me a great opportunity to meet other [practitioners/artists etc.]

Delegates/performers survey	Imag, Mela, Fr, Int, Book, Story	418	435	3.9
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Q To what extent do you agree: Increased my contact with other industry professionals

Delegates/performers survey	Film, Fr	287	291	1.4
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- Provided access to international work that otherwise would not see

Q To what extent do you agree: offered me the opportunity to see international [work/artists/writers] that I would otherwise not see

Delegates/performers survey	Imag, Mela, Fr, Int, Book, Story	539	556	3.1
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- Provided new inspiration for work

Q To what extent do you agree: Given us/me new inspiration for my/our work

Delegates/performers survey	Imag, Film, Mela, Fr, Int, Book, Story	573	602	4.8
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- Increased professional skills, knowledge and understanding

Q To what extent do you agree: Made no difference to my/the company members' professional skills, knowledge and understanding

Delegates/performers survey	Imag, Film, Mela, Fr, Int, Book, Story	570	602	5.3
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Q To what extent do you agree: Made no difference to my / the company's media contacts and exposure

Delegates/performers survey	Imag, Film, Mela, Fr, Int, Book, Story	485	515	5.8
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- Enhanced profile & reputation within the industry

Q To what extent do you agree: Made no difference to the company's profile and reputation

Delegates/performers survey	Imag, Film, Mela, Fr, Int, Book, Story	682	723	5.7
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Q: Did you receive any formal training as part of your volunteering with the Festival?

Volunteer	Jazz, Mela, Art, Intl,	127	135	0.9
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Q: Did you receive any formal training as part of your work with the Festival?

Temp Staff	Fringe, Book, Hog, Intl	101	104	0.9
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WIDER FESTIVAL OUTCOMES

Indicator/Question	Cohort	Source	N	Total N	Non-response rate (%)
- Audience's intention to re-visit Festival next year					
Q Would you/do you intend to come back/attend again next year?	Audience survey	Sc, Imag, Jazz, Tattoo, Int, Book, Story	9,894	10,406	4.92
Q Would you/do you intend to come back/would you participate again next year?	Teacher survey	Imag, Int, Book, Story	132	140	5.71
- Increased likelihood to take children to cultural form more often (proxied from parent/teacher)					
Q To what extent do you agree: Attending [this performance] today has made me more likely to take children to the [theatre] than before my visit	Audience survey	Imag, Book	481	501	3.99
Q To what extent do you agree: Attending [this performance] today has made me more likely to take children to the [theatre] than before my visit	Teacher survey	Imag, Int, Book, Story	133	140	5.00
Q Have you attended in previous years? ([x-ref with visitors from elsewhere in the UK and overseas]	Audience survey	All	6,763	6,796	0.5
- Increased likelihood to attend cultural form more often					
Q To what extent do you agree: Attending events at the [...] Festival has made me more likely to attend other [jazz and blues etc.] events than before my visit/again	Audience survey	Jazz, Art, Tattoo, Fr, Int, Book, Story	11,242	12,117	7.22
- Increased likelihood to take greater risk in attending cultural form					
Q: To what extent do you agree or disagree: Encouraged audiences to take risks in experiencing unfamiliar [cultural form artists].	Journalist survey	Arts, Fringe, Book	193	195	1.0
Q To what extent do you agree: Attending the [screening/s] has/have made me more likely to take greater risk and to go see [less well-known films] than before my visit.	Audience survey	Film, Art, Fr, Book	4,119	4,514	8.75
- Increased feeling of pride in local area among audiences (locals)					
Q To what extent do you agree: The [...] Festival increases my pride in Edinburgh as a city	Audience survey	Jazz, Art, Mela, Tattoo, Fr, Book, Hogm	2,088	2,232	6.45
Q To what extent do you agree: The [...] Festival increases my pride in Edinburgh as a city	Teacher survey	Int, Book, Story	36	37	2.70
- Part of what makes Edinburgh special as a city (local					

audiences/teachers)						
Q To what extent do you agree: Having the [...] Festival is part of what makes Edinburgh special as a city	Audience survey (locals)	Imag, Film, Jazz, Art, Mela, Tattoo, Fr, Int, Book, Story, Hogm	3,236	3,389	4.51	www.bop.co.uk
Q To what extent do you agree: Having the [...] Festival is part of what makes Edinburgh special as a city	Teacher survey	Int, Book, Story	37	37	0.00	
- Part of what makes Edinburgh special as a city (visiting audiences, delegates/performers, journalists)						
Q To what extent do you agree: Having the [...] Festival is part of what makes Edinburgh special as a city	Audience survey (visitors)	Imag, Film, Jazz, Art, Mela, Tattoo, Fr, Int, Book, Story, Hogm	9,543	9,809	2.71	
Q To what extent do you agree: Having the [...] Festival is part of what makes Edinburgh special as a city	Journalist survey	Film, Jazz, Art, Mela, Tattoo, Fr, Int, Book, Hogm	226	233	3.00	
- Appeal of a multi-Festival experience (visiting audiences, delegates/performers, journalists)						
Q To what extent do you agree: Having a variety of Festivals on at the same time adds to the overall appeal	Audience Survey	Jazz, Art, Mela, Tattoo, Fr, Int, Book	8,654	8,928	3.07	
Q To what extent do you agree: Having a variety of Festivals on at the same time adds to the overall appeal	Delegate/Performer survey	Mela, Fr, Int, Book	417	428	2.57	
Q To what extent do you agree: Having a variety of Festivals on at the same time adds to the overall appeal	Journalist Survey	Jazz, Art, Mela, Tattoo, Fr, Int, Book	164	169	2.96	
- Intention to re-visit Festival next year (visiting audiences, delegates/performers, journalists)						
Q To what extent do you agree: [...] Festival has made me more likely to re-visit Edinburgh in the future.	Audience Survey	Tattoo, Fr, Hogm	1,770	1,883	6.00	
- Made delegates/journalists more likely to visit Edinburgh in the future						
Q To what extent do you agree: [...] Festival has made me more likely to re-visit Edinburgh in the future.	Delegates/Performers survey	Film, Fr	224	228	1.75	
Q To what extent do you agree: [...] Festival has made me more likely to re-visit Edinburgh in the future.	Delegates/Performers survey	Imag, Story	43	43	0.00	
- Provided sales lead/new work over next 12 months						
Q: How confident are you that attending/ participating in the Festival will lead to further touring/bookings?	Delegates/Performers Survey	Imag, Film, Mela, Fringe, Int, Book, Story	393	624	0.08	
-Good use of public money						

						Edinburgh Festivals Impact Study
Q: Edinburgh City Council is a major financial contributor to the Festival. Do you think this is a good use of public money?	Audience Survey	Mela, Hogm	711	711	1.66	
- Promotes an outward looking, positive Scottish national identity						www.bop.co.uk
Q To what extent do you agree: [...] Festival promotes an outward looking, positive Scottish national identity	Audience survey	Tattoo, Fr, Story, Hogm	8,792	9,383	6.30	
- Audience's awareness of Edinburgh's diverse culture as showcased by Festival						
Q To what extent do you agree: [...] Festival is an event that showcases Edinburgh's diverse culture	Audience survey	Jazz, Mela	640	680	5.88	
- Attending delegates/performers sharing Festival experience via social media						
Q Have you shared any of your [...] Festival experience via social media?	Delegates/performers survey	Imag, Film, Mela, Fr, Int, Book, Story	697	713	2.24	
- Attending journalists sharing Festival experience via social media						
Q Aside from traditional media outlets, have you personally shared any of your [...] Festival experience via social media?	Journalist survey	Film, Jazz, Art, Mela, Tattoo, Fr, Int, Book, Hogm	372	374	0.53	
- Increased positive messages on Festival experience shared via social media by attending delegates/performers						
Q Are the messages...	Delegates/performers survey	Imag, Film, Mela, Fr, Int, Book, Story	146	151	3.31	
- Increased positive messages on Festival experience shared via social media by attending journalists						
Q Are the messages...	Journalist survey	Imag, Film, Mela, Fr, Int, Book, Story	233	234	0.00	
- Increased contact with people from another community						
Q While at the Edinburgh Mela today, other than the people you came with, did you talk with people from [another community]	Audience survey	Mela	251	318	21.07	
- Audience rating of event where people from different background get on well together						
Q To what extent do you agree: The [...] Festival is an event where people from different backgrounds get on well together	Audience survey	Mela	296	318	6.92	
- Increased audience's/volunteers' understanding of other cultures						

						Edinburgh Festivals Impact Study
Q To what extent do you agree: Made no difference to my understanding of other cultures	Audience survey	Film, Story	897	941	4.68	
Q To what extent do you agree: Increased my understanding of other cultures	Audience survey	Mela	299	318	5.97	www.bop.co.uk
Q To what extent do you agree: Made no difference to my knowledge and understanding of other cultures	Volunteer survey	Mela	34	34	0.00	
- Audiences sharing own culture with others						
Q To what extent do you agree: Allowed me to share my culture with others	Audience survey	Mela	290	318	8.81	
- Increased positive messages about South Asian culture						
Q To what extent do you agree: The Edinburgh Mela gives a positive message about diverse ethnic culture	Audience survey	Mela	302	318	5.03	
- Increased audience's contact with people from same community (locals)						
Q While at the Edinburgh Mela today, other than the people you came with, did you talk with people from [your community]	Audience survey	Mela	200	235	14.89	
- Provide an event that brings the whole community together (locals)						
Q To what extent do you agree: The [...] Festival is an event that brings the whole community together	Audience survey	Jazz, Fr, Hogm	659	695	5.18	
- Provide audience an opportunity to spend quality time together as a family						
Q To what extent do you agree: The [...] Festival event has given us the opportunity to spend some quality time together as a family	Audience survey	Imag, Jazz, Mela, Book, Story	968	1,063	8.94	
Q How many people in your party is: 0-19 years old	Audience survey	All Festivals	14,384	14,384	0.00	
- Improved children & YP's well-being (social, developmental, emotional) [proxied by parent/teacher]						
Q To what extent do you agree: For my child...improved/increased their well being (social,developmental,emotional)	Audience survey	Sc, Imag	509	521	2.30	
Q To what extent do you agree: For my child...made no difference to their well being (social,developmental,emotional)	Audience survey	Book	333	365	8.77	
Q To what extent do you agree: For the children...increased their well being (social,developmental,emotional)	Teacher survey	Imag	128	136	5.88	
Q To what extent do you agree: For the children...made no difference to their well being (social,developmental,emotional)	Teacher survey	Int, Book, Story	99	103	3.88	

- Improve children's confidence to undertake further learning in subject/cultural form (proxied from parent)

Q: To what extent do you agree with the following statement(s): "For my children, this visit has...increased their confidence in their ability to do [the subject/ cultural form]"	Audience survey	Science	383	385	0.9
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www.bop.co.uk

- Improved audience's well-being

Q To what extent do you agree: Improved/increased my well-being (social, developmental,emotional)	Audience survey	Sc, Mela	529	572	7.52
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Q To what extent do you agree: Made no difference to my well-being (e.g. emotional, social, developmental)	Audience survey	Film, Jazz, Art, Tattoo, Fr, Int, Book, Story, Hogm	12,250	13,291	7.83
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- Improved volunteers' health and well-being (social, emotional)

Q To what extent do you agree: Made no difference to my health and well-being (e.g. emotional, social, developmental)	Volunteer survey	Film, Jazz, Art, Mela, Int	141	143	1.40
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Q To what extent do you agree: Made no difference to my health and well-being (e.g. emotional, social, developmental)	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	106	108	1.85
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- Increased volunteers' sense of making a useful contribution

Q To what extent do you agree: Increased my sense of making a useful contribution	Volunteer survey	Film, Jazz, Art, Mela, Int	141	197	2.6
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Q To what extent do you agree: Increased my sense of making a useful contribution	Temp staff survey	Tattoo, Fr, Book, Story, Hogm	104	108	3.70
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- Increased volunteers'/temp staff's self-esteem and confidence in their own abilities

Q Please tell us what effect your volunteering had...My self-esteem & confidence in my own abilities	Volunteer survey	Film, Jazz, Art, Mela, Int	137	143	4.19
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Q Please tell us what effect your work had...My self-esteem & confidence in my own abilities	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	104	108	3.70
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- Increased volunteers'/temp staff's willingness to try new things

Q Please tell us what effect your volunteering had...My willingness to try new things	Volunteer survey	Film, Jazz, Art, Mela, Int	139	143	2.79
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Q Please tell us what effect your work had...My willingness to try new things	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	104	108	3.70
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- Increased volunteers'/temp staff's vocational skills (customer service, hospitality, administration, organisation & management, marketing/PR, technical skills, languages)

Q Would you say that you have improved your skills in...[customer service, etc.]	Volunteer survey	Film, Jazz, Art, Mela, Int	Multiple choice	143		
Q Would you say that you have improved your skills in...[customer service, etc)	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	Multiple choice	108		
- Improved volunteers'/temp staff's communication skills						
Q Please tell us what effect your volunteering had...My communication skills	Volunteer survey	Film, Jazz, Art, Mela, Int		129	143	9.79
Q Please tell us what effect your work had...My communication skills	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm		106	108	1.85
- Increased volunteers'/temp staff's team-working skills						
Q Please tell us what effect your volunteering had...My ability to work as part of a team	Volunteer survey	Film, Jazz, Art, Mela, Int		139	143	2.80
Q Please tell us what effect your work had...My ability to work as part of a team	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm		106	108	1.85
- Increased volunteers'/temp staff's decisions-making skills						
Q Please tell us what effect your volunteering had...My ability to make decisions	Volunteer survey	Film, Jazz, Art, Mela, Int		123	143	13.99
Q Please tell us what effect your work had...My ability to make decisions	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm		105	108	2.78
- Increased volunteers'/temp staff's leadership skills						
Q Please tell us what effect your volunteering had...My ability to lead or encourage others	Volunteer survey	Film, Jazz, Art, Mela, Int		129	143	9.79
Q Please tell us what effect your work had...My ability to lead or encourage others	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm		101	108	6.48
- Increased volunteers'/temp staff's ability to work to deadlines						
Q Please tell us what effect your volunteering had...My ability to work to tight deadlines	Volunteer survey	Film, Jazz, Art, Mela, Int		136	143	4.90
Q Please tell us what effect your work had...My ability to work to tight deadlines	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm		105	108	2.78

- Volunteers/temp staff stating increased employability

						Edinburgh Festivals Impact Study
Q If yes, in what way do you anticipate the experience to be useful...My employability has increased as a result of my volunteering	Volunteer survey	Film, Jazz, Art, Mela, Int	Multiple choice	143	-	
Q If yes, in what way do you anticipate the experience to be useful...My employability has increased as a result of my work	Temp staff survey	, Tattoo, Fr, Int, Book, Story, Hogm	Multiple choice	108	-	www.bop.co.uk
- Volunteers stating improved chances of recognition and promotion in existing paid job						
Q If yes, in what way do you anticipate the experience to be useful...My volunteering has improved my chances of being recognised or promoted in my paid job	Volunteer survey	Film, Jazz, Art, Mela	Multiple choice	143	-	
- Volunteers/temp staff stating beneficial effects on studies/training						
Q If yes, in what way do you anticipate the experience to be useful...will be beneficial to my studies/training	Volunteer survey	Film, Jazz, Art, Mela, Int	Multiple choice	143		
Q If yes, in what way do you anticipate the experience to be useful...will be beneficial to my studies/training	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	Multiple choice	108		
- Volunteers'/temp staff's intention to take up a course to develop skills gained through volunteering						
Q If yes, in what way do you anticipate the experience to be useful...I am considering taking up a course to develop the skills I developed as a volunteer	Volunteer survey	Film, Jazz, Art, Mela, Int	Multiple choice	143		
Q If yes, in what way do you anticipate the experience to be useful...I am considering taking up a course to develop the skills I developed through my work	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	Multiple choice	108		
- Increased contact with like-minded people						
Q Please tell us whether you agree: ...enabled me to meet like-minded people	Volunteer survey	Film, Jazz, Art, Mela, Int	141	143	1.40	
Q Please tell us whether you agree: ...enabled me to meet like-minded people	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	105	108	2.78	
- Increased useful professional contacts						
Q Please tell us whether you agree: ...helped me to make useful contacts with people from the [film industry; visual arts sector etc]	Volunteer survey	Film, Jazz, Art, Mela, Int	141	143	1.40	
Q Please tell us whether you agree: ...helped me to make useful contacts with people from the [film industry; visual arts sector etc]	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	105	108	2.78	
- Increased intention to volunteer in other activities/projects						

Q As a result of your experience...[take up temp work with Festival, volunteering with Festival, volunteering in other projects]	Volunteer survey	Jazz, Art, Mela, Int	Multiple choice	135		
Q As a result of your experience...[take up temp work with Festival, volunteering with Festival, volunteering in other projects]	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	Multiple choice	108		
- previous experience						
Q Before getting involved with the [...] Festival 2010, have you carried out volunteering with...[all options]	Volunteer survey	Film, Jazz, Art, Mela, Int	Multiple choice	143		
Q Before getting involved with the [...] Festival 2010, have you carried out volunteering with...[all options]	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	Multiple choice	108		
- motivations for volunteering/work experience						
Q Why did you decide to volunteer with the [...] Festival?	Volunteer survey	Film, Jazz, Art, Mela, Int	Multiple choice	143		
Q Why did you decide to work with the [...] Festival?	Temp staff survey	Tattoo, Fr, Int, Book, Story, Hogm	Multiple choice	108		
- Reach large/specialist/local/international audience						
Q Please let us know what you perceive...Allows us to reach a target demographic of potential locally-based customers/clients	Sponsors survey	All		32	39	17.95
Q Please let us know what you perceive...Allows us to reach a target demographic of potential national and international customers/clients	Sponsors survey	All		31	39	20.51
Q Please let us know what you perceive...Allows us to reach a target demographic of potential customers/clients based on their socio-economic profile	Sponsors survey	All		29	39	25.64
Q Please let us know what you perceive...Offers good value for money in reaching our target demographic	Sponsors survey	All		31	39	20.51
- Build positive brand value through association						
Q Please let us know what you perceive...Enables us to associate our organisation with innovation and creativity	Sponsors survey	All		31	39	20.51
Q Please let us know what you perceive...Enables us to associate our organisation with high quality events and activities	Sponsors survey	All		34	39	12.82
Q Please let us know what you perceive...Enables us to associate our organisation with culture and celebration	Sponsors survey	All		34	39	12.82
- High quality corporate hospitality						
Q Please let us know what you perceive...Provides us with high quality corporate hospitality opportunities	Sponsors survey	All		35	39	10.26

Q Please let us know what you perceive...Provides staff with additional non-wage benefits (e.g. discounted tickets) that help with recruitment and retention	Sponsors survey	All	35	39	10.26
Q Please let us know what you perceive...Helps us to build staff morale and cohesion	Sponsors survey	All	33	39	15.38
- Deliver on CSR commitments					
Q Please let us know what you perceive...Helps us to deliver our corporate social responsibility mission	Sponsors survey	All	31	39	20.51

