

The Ascent of Manchester

An independent evaluation of the first Manchester
International Festival: 28 June – 15 July 2007

Executive Summary

January 2008

**'The Ascent of Manchester' – an independent evaluation of the first
Manchester International Festival: 28 June – 15 July 2007: Executive Summary**

© 2007 MORRIS HARGREAVES MCINTYRE & Arts About Manchester

50 Copperas Street, Manchester, UK M4 1HS

Telephone 0161 839 3311

Fax 0161 8393377

Email inray@lateralthinkers.com

www.lateralthinkers.com

Contents of tables and graphs

Table 1 - Ticket sales 15

Table 2 - Income and expenditure 16

1 Executive summary

The ascent of Manchester Headline of article on the launch of the Manchester International Festival by Jim White, Daily Telegraph, 21/03/07

The first Manchester International Festival took place in the summer of 2007 running for 18 days from the 28 June to 15 July.

The Festival emerged as a legacy of the Commonwealth Games and the accompanying Cultureshock Festival. With an impressive infrastructure in place, and the confidence borne of the extraordinary success of the Games, the creation of an arts festival was conceived by the City Council as the first manifestation of the new brand concept of Manchester as the 'original modern city'.

The primary aim of the City Council was to drive economic development by substantially raising the profile of Manchester, attracting inward investment, by positioning the City as an international centre for culture and as a knowledge capital.

In 2004, Manchester City Council appointed Alex Poots as Festival Director and he brought with him a vision for an international festival that would commission and produce a range of new work from leading international artists to create the world's first festival of original new work.

The Festival set itself four broad aims, 16 objectives and 14 specific targets. This summary reports the achievements of the Festival against these aims, objectives and targets.

The evaluation strategy comprised an e survey of *bookers*¹ for the Festival; a survey of the population of Greater Manchester²; an internal audit; stakeholder interviews and e surveys of stakeholders and volunteers. The budget did not extend to surveying attenders at free or un-ticketed events, therefore the data analysed is mainly for tickets booked via Ticketmaster, the Palace and Opera House.

¹ By bookers we mean people who booked tickets through the ticket agency Ticketmaster and the Palace and Opera House box offices. This excludes the 26% people who booked through other venues. 1278 bookers completed this survey.

² The population survey recorded the responses of a representative sample of 1556 people living in Greater Manchester aged 15 or over. The survey was carried out by telephone shortly after the Festival.

Aim 1 - To create an international, ambitious and extraordinary festival, dedicated to commissioning new work from across the spectrum of creativity and human endeavour

Objectives:

To premiere extraordinary new events and productions, in partnership with international presenters, broadcasters, sponsors, and media partners

To focus on the urgent stories of our time, through commissioning events and through initiating debate, and on music, an area that Manchester is well known for

To present the Festival across various platforms, locations and venues

Targets:

10 premieres

3 international co-productions

50 events in 5 different locations

The Festival over-achieved in the delivery of the artistic programme

There were 31 premieres against target of 10.

The Festival generated 105 different activities in 25 different venues across Manchester and at Salford Quays.

There were four international co-productions: *Monkey - Journey to the West*, *Il Tempo Del Postino*, *Feedback* and *For All The Wrong Reasons*. Those four productions have transferred internationally.

There were also several national and local co-productions including collaborations with the BBC Philharmonic and BBC Radio 3, Opera North, The Guardian, The Hallé, Contact Theatre and Serpent's Tail.

There was a free family event *The Great Indoors* that attracted 10,000 adults and children.

The Festival collaborated with 87 Manchester and Salford arts and community organisations.

The programme was brought in on time with all events opening as scheduled and the Festival successfully completed on budget.

I found the diversity of programmes on offer was what made MIF stand out for me - I regularly attend music festivals and one-off cultural shows but

have never experienced a mix, where the focus wasn't on music particularly and I really enjoyed that. It gave me the opportunity to explore different mediums of the arts in a city I love Festival attender

I think that the diversity of the various events made for an interesting and culturally vibrant festival. It offered lots of choice, something for everyone, not too biased toward one area Festival attender

AIM 2 - To help secure Manchester's reputation as a world class cultural city, celebrating its pivotal role in music, the arts, science, culture and innovation

Objectives:

To achieve recognition and buy-in from international, national and local audiences and media

To position Manchester as a cultural destination, and thus develop sustainable markets for the cultural infrastructure

To attract a substantial proportion of the audience from beyond the North West region

To become a destination for the world's festivals, venues and cultural organisations, looking for new work to present in their territories

To reflect and reinforce the core brand values of the City

Targets:

£5.7 million equivalent advertising value

2 Hours TV and 6 hrs radio events broadcast (excluding news coverage)

Attract at least 10% of the audience from outside the NW region

3 international co-productions

The Festival attracted Press coverage to the value of over £12 million

The Festival drew press attention regionally, nationally and internationally. There was an estimated 12 hours of coverage on BBC National Networks as well as an estimated 288 articles in the national printed media, 241 articles across regional publications and 302 across international, online, trade and consumer publications. There were 7 features in national supplements, including 2 supplements exclusively dedicated to the Festival (The Guardian, 36 pages and MEN, 8 pages), and the Festival recorded coverage on 78 websites.

The media coverage reflected the Festival's aim to establish itself as 'an international, ambitious and extraordinary Festival'

This was a staggering event, for a staggering city, and if the rest of the fest is as mind-blowing, then we're in for a treat **BBC Manchester online on Lou Reed's Berlin**

Anything that celebrates adventure, newness, intellectualism, radicalism has to be in Manchester. The whole history of the city is all about that and this [MIF] is the kind of thing that it suits **Paul Morley, BBC2 Newsnight Review**

The Festival helped boost the image of Manchester and position it as a desirable destination

43% of the Greater Manchester population agreed with the statement that the Manchester International Festival makes Manchester 'a great place to live, work or study'; 64% of bookers agreed with this statement.

45% of the Greater Manchester population agreed with the statement that the Manchester International Festival 'helps make Manchester a world class cultural city'³; 80% of bookers agreed with this statement.

The Press confirmed that the Festival had achieved its vision and endorsed the status of Manchester.

Why can't Birmingham do it like Manchester? By this I meant (sic) host a festival that both gains national and international media attention for the city, has a real presence within the city, and raises the bar in what a regional city can achieve **Dan Jones, Birmingham Post July 2007**

Manchester is the beating cultural heart of Britain **Miranda Sawyer, The Observer July 2007**

Manchester manages a mix of business brio and pleasant public spaces. Against that backdrop the festival makes perfect sense, crystallising

³ Population percentages taken from the population survey

*Manchester's aspiration to take its place alongside your Milans and Bilbaos
Guardian Unlimited April 2007*

*Is there anyone in the world who now doesn't realise that Manchester is a
major player in the world arts scene? Kevin Bourke, Manchester Evening News July
2007*

*The organisers of Manchester's new International Festival promised to give
the city a cultural jamboree unlike any other in the world....if they all hit the
spot like this opening show, the world will come flocking to Manchester. The
Times*

This is a resounding endorsement of the effect of an event like this on the image and desirability of the City for both inhabitants, visitors and Press, and was seen by stakeholders to justify the investment of Manchester City Council, sponsors and funders simply in terms of the value of media coverage achieved.

The Festival attracted a diverse audience from throughout the country and internationally

25% of bookers using Ticketmaster or the box offices at the Opera House and Palace Theatre came from outside the North West region. The percentage of all attenders from outside the North West will probably be lower than this since more local people would have attended the free or un-ticketed events on which data wasn't gathered. 1% of people booking tickets came from overseas.

An impressive number of the Festival's international peers attended the Festival, from the VIP guest list, including 13 festival directors, 46 cultural leaders and many international journalists. The Festival also attracted delegations from China and Chicago.

Aim 3 - To welcome Manchester's talent, resources and communities to take part in their City's Festival, in extraordinary ways that reflect the Festival's ambition

Objectives:

To reach out to audiences in the more deprived areas of the City

To create employment and volunteering opportunities backed up by skills development programmes

To encourage Festival artists to develop partnerships with regional talent and resources

To foster the creation of long-term international, national and local partnerships for the Festival and other Manchester cultural organisations

To foster cross-sectoral linkages, e.g. between the Higher Education sector and cultural organisations

Targets:

5% of the audience to come from regeneration areas of Manchester

160,000 visitors

29 jobs created within the Festival team

200 volunteers of whom 150 receive training

20 local companies contracted to MIF as service suppliers

1 post of Higher Education Festival Manager

The Festival exceeded its target for attendances by 26%

There were 200,930 attendances and participants, 26% more than the target of 160,000 attenders.

There were 86,085 attendances for ticketed events, a further 114,845 attendances or participations in community events and projects, educational workshops and free events. This is a conservative estimate of total attendances and does not include attenders at, for example, local street markets organised by the City to coincide with the Festival (estimated at 40,000).

23% of bookers at ticketed events came from the City of Manchester and 32% from the rest of Greater Manchester; 19% from elsewhere in the North West; 25% from the rest of the UK and 1% from overseas.

If we assume that the distribution of bookers is similar to all attenders, that means that there were 110,511 attenders from Greater Manchester and 46,213 from Manchester itself.

36% of bookers came from within a 1 hour drive time of City Centre Manchester, or in real terms 72,335 people.

The Festival's target was to attract 5% of its audience from regeneration areas of Manchester. The most appropriate measure of this is to consider the 100 most deprived Super Output Areas as defined by the 2004 Indices of Multiple Deprivation. 1289 bookers came from the deprived SOAs of Manchester. This actually represents 6.7% of total bookers, thus exceeding the target. It is assumed that this figure would be higher amongst attenders for the free or unticketed events.

Atenders covered a wide age spectrum with many events attracting the generally under-represented age group in the conventional arts audience of 25 – 34 year olds.

Though Il Tempo del Postino drew audiences from New York, Tokyo and Los Angeles, the place was also full of young Mancunians, as you could hear from their accents Paul Vallely, The Independent Extra July 2007

The Festival attracted a very different ACORN⁴ profile of bookers from the general Greater Manchester audience with significantly fewer Wealthy Achievers, more than double the normal Urban Prosperity and more people in the Moderate Means Groups. These groups are not generally well represented amongst conventional arts attenders in Manchester.

The Festival encouraged people to try art forms for the first time. As many as 27% of bookers⁵ were attending an art form for the first time: 25% were attending contemporary dance for the first time; 24% classical music, 22% art exhibitions and 21% opera.

As many as 69% of bookers were attending arts and other venues for the first time: 69% of people attending the event at John Rylands Library had not been there before; 63% Manchester Central; 46% The Town Hall; 44% Castlefield Gallery; 43% The Palace Theatre; 35% the Museum of Science and Industry; 34% The Library Theatre; 28% the Royal Exchange Theatre and 24% The Lowry.

⁴ Acorn is a leading geo-demographic classification used to identify and understand the UK population. Acorn categorises all 1.9 million UK postcodes using a variety of demographic statistics and lifestyle variables into five main categories: 'Wealthy Achievers', 'Urban Prosperity', 'Comfortably Off', 'Moderate Means', 'Hard Pressed'. www.caci.co.uk/acorn

⁵ The 74% of people who booked through Ticketmaster, The Palace and Opera House

Opened the art forms to a much wider audience. I've not seen the Palace Theatre so full of such a varied audience in years! Festival attender

Makes the arts accessible to all Festival attender

The Festival had its high brow elements as you would expect ... however [it] had its mainstream elements too which is essential to prevent it getting stuck up its own behind Festival attender

'What's most encouraging, however, is the sense of something new and exciting being created from the melding of many disparate styles – pop and classical, Western and Eastern, visual and aural. The audience, about 50 years younger on average than the usual opera crowd, loved it. (Monkey - Journey to the West)' The Times

85% of bookers said they were likely to return to these venues now that they had visited for the first time during the Festival.

This testifies to a considerable legacy that the Festival has created for future arts participation in Manchester.

The Festival had a profound impact on people

- 26% of bookers described their experience of the Festival as inspirational
- 29% of bookers described their experience of the Festival as uplifting
- 33% of bookers described their experience of the Festival as unforgettable

Visitor responses to the programme

The Pianist was the most fantastic piece of live theatre I have ever seen Festival attender

The concept and delivery of the Monkey show was outstanding and set the tone for the whole festival, with very strong branding for breaking down barriers, accessibility, innovation, big names, fusion of classical and popular etc. Festival attender

Monkey - Journey to the West - I shall remember our visit forever Festival attender

Brave enough to put on original events, some astoundingly so Festival attender

Il Tempo del Postino was fantastic, I feel like I have witnessed a moment in history Festival attender

The highlight for me was Il Tempo del Postino - I cannot imagine ever seeing such a thing in my life - was amazing, will never forget it Festival attender

Volunteers experienced personal benefit

Volunteers at the Festival gave an enthusiastic response to their experiences and many expressed a willingness to take part in any future Festivals. 90% of volunteers said that they felt a sense of achievement after volunteering at the Festival.

In a decision-making career littered with the skeletons of poor choice and vacillation this shares the podium with returning to study and picking Silver Birch in this year's Grand National ... a truly smart move Volunteer

The volunteer role is giving me unique access to the Festival and allowed me to fulfil both personal and professional ambitions Volunteer

The Festival encouraged people to take chances and change habits

This Festival of innovation attracted 25% Risk Takers⁶, 67% Cautious Gamblers and 8% of Safety Firsts. This is the normal distribution of Risk Takers, which is generally no more than a quarter of any market, although there were more Cautious Gamblers and, not surprisingly, fewer Safety Firsts. This indicates that the Festival did not only attract those open to new things. Three quarters of bookers who generally need a considerable amount of endorsement, guarantees and reassurance before booking for events took a chance with the Festival. This is evidence that the marketing strategy was successful in overcoming the usual reticence of this type of attender.

However the survey reveals that bookers said they behaved even more cautiously than they usually would⁷. With the exception of those events featuring very well known names, a large proportion of bookers waited for previews, reviews and word of mouth recommendation before booking for shows. This was the reason for the booking patterns that peaked quickly just prior to shows opening, or after they did open, and signifies very powerful word of mouth and media endorsement driving bookings. This can create a problem for an event in achieving income targets, where the shows have very short runs and low capacity is achieved in the opening nights. This points to the need for strong brand building for subsequent Festivals to provide the reassurance for bookers, in advance of shows opening, to encourage a greater

⁶ Risk Takers are prepared to book for a show based on little prior knowledge; Cautious Gamblers are prepared to take chances but require known names or recommendation from trusted sources; Safety Firsts will only book on the basis of sound guarantees

⁷ Visitors were asked to describe their usual behaviour when booking tickets to arts events in general, and then how they had behaved booking tickets to Festival events

level of advance sales for those shows that don't have the advantage of strong brands.

92% of bookers will attend the Festival in future and 91% would recommend it to others.

Wider public awareness

Within the Greater Manchester adult population⁸ the Festival achieved a 35% awareness penetration, in other words it reached the attention of over 720,000 people. This is over a third of the awareness penetration levels achieved by such established mainstream venues as the Palace, Opera House and Lowry and a very useful benchmark for setting awareness targets for future Festivals.

The Festival achieved 3.4% attendance penetration of the Greater Manchester adult population who *knowingly* attended the Festival. This is equivalent to nearly 72,000 people aged 15 or over. This level of penetration compares well to other far longer established venues which enjoy between 13% - 20% penetration of the Greater Manchester population saying they have attended within the past 12 months.

The figure for attendance penetration would rise considerably when account is taken of the numbers of people who may have inadvertently attended the Festival by coming across, for example, the Steve McQueen exhibition in the Central Library, or who attended educational and community events through organised groups. The penetration figure for Greater Manchester when this type of participation is taken into account is estimated to be nearer 230,000 people or 9.8% of the total population of Greater Manchester (including children).

There is a vast potential market for the Festival within the Greater Manchester catchment area since 67% of the Greater Manchester population, when the Festival vision and programme was described to them, said they would be interested in attending the Festival in future, this equates to nearly 1.4m people.

The Festival's marketing strategy aimed to position the Festival locally, regionally, nationally and internationally. It targeted a range of segments including younger urban people who are not generally well represented in arts audiences, older empty nesters, families, international visitors, short break visitors and local people. The marketing activity focused on achieving high levels of press coverage and placed emphasis on using cost effective and innovative electronic communications channels rather than relying too heavily on conventional media such as print and direct marketing tools. This may be

⁸ A survey of people aged 15 or older living in Greater Manchester, conducted shortly after the Festival

the reason behind what is perceived by some stakeholders and sponsors to be low awareness levels amongst the more conventional arts going audience that could be addressed next time through more direct marketing and individual event print directed at known arts attenders.

294 Volunteers were recruited

The Festival aimed to recruit 200 volunteers, 150 of whom were to receive training. In the event this target was exceeded. 294 volunteers were recruited from members of the public, including 40 from sponsoring organisations. 150 volunteers received training, thereby meeting this target.

The total value of volunteer time to the Festival is estimated to be over £200,000.

The Festival created 38 jobs against a target of 29

The Festival worked with four Higher Education partners:

The University of Manchester, Manchester Metropolitan University the University of Salford and the Royal Northern College of Music were all closely involved with the Festival.

A post was created of Higher Education Festival Manager who acted as co-ordinator of this partnership managing the various interfaces the Higher Education partners had with the Festival through the staff, students, venue provision and the sharing of expertise, skills and resources.

The Festival appointed 310 local suppliers against a target of 20.

The Festival worked with 87 arts and community organisations in Greater Manchester and the North West.

There were more arts organisations who would have liked to have had some involvement with the Festival than were actually able to in this first year. Some of these assumed that the Festival was a funding organisation helping them to achieve their programming aspirations. It was important for the first event to clarify that the vision for the Festival was to produce new, artist-led commissions and that this is the clear context for collaborations with regional artists and organisations in the future.

Aim 4 - To be a sustainable driver in the City's economy, ensuring that there is a lasting legacy for the City

Objectives:

To attract substantial numbers of attendances at the Festival and trailblazer events

To lever substantial new sources of investment, securing a budget of £5 million plus, through both public and private sector funding

To achieve a significant economic impact

Targets:

160,000 attendances

£5.5 million to be achieved through public and private sector funding

Economic impact value of £19.1 million

The Festival exceeded its target for attendances with more than 200,000 attending the ticketed events and a programme of trailblazers, workshops, exhibitions and community events

Ticket sales

Table 1 shows the number of tickets sold at the Festival in relation to the total tickets available highlighting the ticket yield based on the Festival sales data.

Table 1 - Ticket sales

Total available ticket capacity	98,231
Total sponsor tickets	10,530
Total tickets available to sell	87,701
Total tickets sold	68,759
Total capacity sold %	78%
Total comps (inc. press tickets)	6,796
Total bookers	24,589
Total box office income	£1.3m
Average tickets per booking	2.8
Total average transaction	£53.03 (gross)
Average ticket yield	£18.94

The Festival exceeded its target for sponsorship and funding, attracting a wide selection of partners

The target was to raise £5.5m in public and private sector funding but excluding box office receipts.

Table 2 - Income and expenditure

Income	Amount
Manchester City Council	£2.3m
Sponsorship	£3.6m
Public Funding	£1.2m
Other Funding	£0.6m
Ticket sales	£1.3m
Total income	£9m
Expenditure	Amount
Festival operations	£2.5m
Artistic programmes	£5.4m
Marketing	£1.1m
Total expenditure	£9m
Deficit	£0

As can be seen from *Table 2*, the total raised against this target, inclusive of the £2.3m from Manchester City Council was £7.7m. This includes sponsorship of £3.6m including value in kind - the most sponsorship ever raised for a UK festival.

Manchester City Council provided £2.3m in funding and other funders contributing £1.2m were Arts Council England, The Urban Cultural Programme and Salford City Council.

The Festival attracted 14 sponsors and many other corporate partners and members.

Official Sponsors were Bruntwood, United Utilities, Manchester Airport Group and Northwest Regional Development Agency who supported the Festival from the beginning. With further sponsors City Inn, Virgin Trains and Sony Playstation, they created a powerful group of additional official top tier sponsors.

The Official Supporters were NCP, Speedy Hire and SAAB. Official Suppliers: Cobbetts, Deloitte, Insider and Stephenson Bell. Corporate Partners were: Argent Group Ltd, Albany Crown Ltd, Ask Property Development, Allied London, Alliance Property Group Ltd, West Properties Ltd, First Bus, Frogmore Northern and Urban Splash Ltd.

Sponsors were attracted by the opportunity to align themselves with the innovation encapsulated in the vision of the Festival and with the City of Manchester.

Media partners were the Guardian, the BBC and the Manchester Evening News.

Sponsors and partners were delighted by their association with the Festival. They particularly judged its success on the basis of the quality of the programme and the volume and positive nature of the press coverage it received.

There were some sponsors who would have appreciated a greater level of strategic partnership and sponsors and stakeholders were frustrated by the lack of earlier advance notice of the events programme, although, with hindsight, they recognised the need for embargoing information during sensitive contractual stages and to maximise the impact of the Press campaign.

The Festival substantially exceeded the anticipated economic impact for the City

Using the model prepared for the Festival at feasibility stage by Cambridge Policy Consultants who were commissioned by Manchester City Council, we estimate that the Festival achieved an economic impact value of £28.8 million 51% more than the target of £19.1m⁹.

The data makes it very clear that the Manchester International Festival not only achieved its aims and objectives but greatly exceeded them in many cases. There was a small deficit in ticket income largely due to *Industrial Revolution* underachieving its ticket sales target.

The market attracted was diverse and open to the new work presented.

General Feedback from Public and Stakeholders

There were some criticisms of the ticket agency Ticketmaster on the basis of the slowness and inflexibility of the internet booking mechanism.

Whilst the Festival Pavilion, located outside Manchester Central, was enjoyed by many there was a suggestion that its location was too peripheral and should have been located more centrally.

If anything was missing from this first Festival, apart from the weather to help add to the buzz and presence of the Festival throughout the City Centre (it did happen during the worst recorded summer in Manchester and indeed across

⁹ CPC model is based on 35,000:1 - visitors per £m of total festival cost

Europe) it was the absence of a large, free, spectacular, celebratory event that would have attracted a diverse cross section of local people.

During the consultation stage for the Festival, in the period immediately after the Commonwealth Games, the impression Manchester City Council conveyed to arts organisations was that the event would be a community-focused Manchester-grown event. This informed the expectations of a number of individuals and arts organisations, which didn't change after Alex Poots had been appointed and the actual artistic vision had been communicated.

Even though the vision was for a Festival of original, new commissions, and for a ground breaking and innovative event, there was still an expectation amongst some of the range of stakeholders that it would feature many of the characteristics of a more conventional arts festival. Against these expectations the Festival may have disappointed some, but this is the nature of innovation: it may take a while for the vision to be widely understood and appreciated. But the reception to the first event has confirmed that the vision found connection with a substantial number of people in Manchester and beyond, and particularly with the media.

Apart from these qualifications the data and qualitative feedback confirms that this first event was an outstanding success both for the City, the Festival and all of those partners and stakeholders associated with it. There were lessons learnt and many more people who can be engaged next time, but on the whole the success of the Festival cannot be disputed as the data all speaks for itself.

'After the success of the first Festival, we hope to build on the successes and learn from our mistakes to try to create a more ambitious Festival for 2009. With the support of our sponsors, funders and partners, we hope to build on the Festival's vision, which is to create an international festival that presents original new work, created by talented and internationally renowned artists.' Alex Poots, Artistic Director, Manchester International Festival



Morris Hargreaves McIntyre is a creative and intelligent arts management consultancy working in the interests of audience and organisational development.

The company combines thorough project planning with incisive, deep analysis, lateral thinking and detailed, intelligent strategic planning to produce relevant, helpful and high quality reports with practical recommendations.

Our services include:

- strategic analysis, planning and development
- product and service development
- feasibility studies
- market appraisals
- marketing audits, strategies and plans
- audience development strategies and implementation
- access strategies
- in-service training
- training needs analysis
- training programmes
- organisational development
- change management

Most of our projects are research-based.

We have a fully integrated market research service that undertakes:

- quantitative research
- qualitative research
- telephone marketing
- community consultation

