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Press Release

FESTIVALS' FAR-REACHING IMPACT ON LOCAL AND NATIONAL LIFE AND ECONOMY REVEALED BY GROUND-BREAKING STUDY

Embargoed until 11.30am, 23 May 2011

Massive economic impact, huge tourism and promotional benefits and significant contributions to local and national identity and pride are all key findings from independent research published today (23 May) which describes and quantifies the effect of Edinburgh's year-round Festivals on locals, visitors, young people, artists, the economy and the environment.

The largest programme of research ever undertaken into Edinburgh's twelve major Festivals, comprising 15,000 survey responses over a twelve month period, not only reaffirms Edinburgh's position as the world's Festival City but articulates, for the first time, the contribution the Festivals make to the social, cultural and civic life of Scotland and its capital city.

The *Edinburgh Festivals Impact Study*, announced today, includes the following key findings:

- The Festivals generated over a **quarter of a billion pounds worth of additional tourism revenue** for Scotland (£261m) in 2010. The economic impact figure for Edinburgh is £245m.
- The Festivals play a **starring role in the profile of the city** and its tourism economy, with 93% of visitors stating that the Festivals are part of what makes Edinburgh special as a city, 82% agreeing that the Festivals make them more likely to revisit Edinburgh in the future and 82% stating that the Festivals were their sole or an important reason for coming to Scotland.
- 85% of all respondents agree that the Festivals promote a confident, positive Scottish national identity; and 89% of Edinburgh respondents say that the **Festivals increase local pride** in their home city.
- The Festivals **encourage and widen access to the arts**, with 77% of audiences saying that the Festivals had enabled them to discover new talent and genres, and nearly two-thirds saying that the Festivals encourage them to take risks and see less well-known performances, events or films.
- 93% of parents agreed that attending Festival events as a family **increased their child's imagination**.

The *Edinburgh Festivals Impact Study* is written by leading economic and social impact researchers BOP Consulting. While the calculation of economic impact remains important, enabling the first update of figures since the last economic impact evaluation back in 2004¹, this groundbreaking study embraces the ambitious challenge of understanding and benchmarking those impacts beyond the purely financial.

¹ SQW (2005) *Edinburgh's Year Round Festivals 2004-5 Economic Impact Study*



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Quantifying the **social, cultural and environmental effects** of major events, in addition to the economic return, is emerging as best practice in the international events sector – and the Festivals and the stakeholders wanted to lead the way by developing this method of analysis and reporting for this latest study.

Commenting on the report, the Chair of the Festivals Forum, Lady Susan Rice, said: *“Edinburgh’s Festivals are a cultural phenomenon, celebrated globally and treasured locally. They are one of Scotland’s most visible assets and, thanks to this study, we now have a clearer understanding of the breadth of their benefits reach across Edinburgh and Scotland. In a competitive tourism market and shifting economic climate, this study will be essential in helping us identify the best ways to ensure the Festivals flourish for generations to come.”*

Culture Secretary, Fiona Hyslop, said: *“Year on year Edinburgh’s world-renowned Festivals continue to enchant audiences from home and around the world. From our early days in government, we have shown our commitment to the festivals, establishing and investing in our Expo Fund which has produced award-winning creative collaborations and showcases Scottish artistic talent.*

In addition to the inherent cultural and social benefits our festivals bring to Edinburgh and to Scotland, this report highlights the significant economic benefits they reap with over one quarter of a billion pounds of additional tourism revenue generated alone. The future is bright for Edinburgh’s festivals and, as Culture Secretary, I am looking forward to experiencing a fantastic programme this year and announcing details of how we will expand the Expo Fund to benefit the festivals for years to come.”

Kath Mainland, Chair of Festivals Edinburgh, added: *“This substantial new report firmly establishes Edinburgh as the world’s leading Festival city, and provides clear evidence that the most attractive aspect of the festivals for our audiences is the quality, range and diversity of what we offer. The combination of our distinctive world class festivals is key to attracting both local and visiting audiences. Without this unique offering the festivals would not make the much-envied economic, cultural and social contribution to Edinburgh and Scotland that we currently do.”*

ECONOMIC IMPACT

The study calculates that Edinburgh’s Festivals generate £261m for the national economy and £245m for the Edinburgh economy. To put this in to context, the most recent independent economic impact figure for Golf Tourism to Scotland is £191m². The Festivals also sustain 5,242 full-time equivalent jobs.

Although the Festivals enjoy over 4m attendances every year, the lion’s share of additional, non-ticket visitor expenditure is attributable to beneficiary businesses, such as hotels and retailers. 37% (or £41m) goes to accommodation providers, 34% to food and drink establishments, 6% to retailers and 9% is spent on transport.

² SQW (2011) *An Assessment of Golf Tourism’s Future Growth Potential to 2020*



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SOCIAL AND CULTURAL IMPACTS

One of the most groundbreaking areas of work is the analysis of the importance of the Festivals to cultural and social life in Scotland. The Study asked local and visiting audiences, performers, teachers and media about “the Festival effect” in a number of areas: such as how well Festival events compare to competitor events nationally and internationally, how the Festivals inspire children and young people, how they encourage further visits to arts and culture, how they enhance the image and identity of Edinburgh and Scotland and how they foster a sense of community and well-being. This is the first time that such far-reaching questions have been asked on this scale.

Some of the most striking findings in the study relate to the overwhelming impact the Festivals have on **local pride and attractiveness as a visitor destination**. There is very strong evidence of the Festivals’ contribution to local, national and international profile. 82% of visitors stated that the Festivals were their sole or an important reason for their trip to Scotland. Similarly, 85% of all respondents agreed that the image that the Festivals present of Edinburgh and Scotland is one of diversity and openness, showcasing a positive national identity.

At a citywide level, 93% of tourists and visitors said the Festivals are part of what makes Edinburgh special as a city, and 82% agreed that their experience at the Festivals makes them more likely to visit Edinburgh in the future. Local respondents also rated the Festivals extremely favourably, with 89% agreeing that the Festivals increase their pride in their home city.

Furthermore, in the Summer period, the Festivals running concurrently is also seen as a major benefit, with 78% of survey respondents agreeing that having the Festivals on at the same time adds to the overall appeal of the Festival City.

Many of the other key findings relate to the Festivals role in **widening access and participation**. There were 32,055 attendances at dedicated workshops and educational events, 95% of whom were children and young people. 93% of parents agreed that attending Festival events increased their child’s imagination, rating Festivals events an average of 8.5 out of 10 when asked to score events on behalf of their families.

Impacts do not just extend to children however, with 93% of all audiences stating that the Festivals enabled them to see artists or events that they would not normally get to see; and over three quarters of attendees (78.4%) rate the quality of Edinburgh Festivals events as better or much better than similar events elsewhere. Nearly two thirds of Festival audiences said that their festival experience had made them more likely to take greater risks and attend less well-known performances.

ENVIRONMENTAL IMPACT

For some time the Festivals have been working hard to address climate change and resource depletion, introducing a number of initiatives to mitigate the effects of their offices and events such as minimising waste to landfill, monitoring and reducing energy use, printing on responsibly sourced paper and reducing paper usage overall. Many Festivals also present events, talks and films to promote understanding of environmental issues.

The study has helped support the environmental work the Festivals do, individually and collectively, in developing ways of benchmarking, monitoring and reducing the overall environmental impact of the Festivals for the very first time.



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In the first attempt to record this impact, the study reveals that audience travel to events accounts for the majority of CO₂ emissions, and has been calculated as ~44,653 tonnes, equivalent to 1.34kg of CO₂ per ticket sold. In terms of waste management, nearly half (48%) of waste from Festival offices is recycled.

Given their temporary nature, assessing the operations and impact of many of the “pop-up” Festival venues is a much more complex undertaking. To this end, however, the Festivals have been recently collaborating on a pilot “Green Venue Initiative” which supports, facilitates and recognises those venues that are monitoring, measuring and reducing their environmental impact. 2010 was the pilot year for this programme, and 27% of Festival shows took place in a “Green Venue”. It is anticipated that this figure will grow in the near future, enabling the full environmental footprint of Edinburgh’s Festivals to be increasingly monitored and reduced.

CONTEXT AND COMMISSIONING PARTNERS

The Study was commissioned by the Festivals Forum, the high level strategic commission which brings together representatives of those with a stake in maintaining the Festivals’ global competitive edge. It was funded by the Scottish Government, City of Edinburgh Council, Scottish Enterprise, Creative Scotland and EventScotland. It analysed audiences, journalists, delegates, participants, volunteers, temporary staff and teachers at the twelve major Festivals³ that make up Festivals Edinburgh, the strategic body that takes the lead on the Festivals’ joint strategic direction in the wake of the *Thundering Hooves* report⁴. It was written by leading economic and social impact researchers, BOP Consulting.

BOP Consulting’s Director, Josephine Burns, said: “This was an ambitious piece of research, involving new approaches to measure the wide range of impacts that the Festivals have on Edinburgh and Scotland. Such a far-reaching and comprehensive research study is unique in the sector and we are delighted with the results which provide a strong base on which to develop the Festivals in the years ahead.”

A full copy of the report is available for download from www.festivalsedinburgh.com

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³ The twelve participating Festivals, in alphabetical order, are: Bank of Scotland Imagine Festival, Edinburgh Art Festival, Edinburgh Festival Fringe, Edinburgh International Book Festival, Edinburgh International Festival, Edinburgh International Film Festival, Edinburgh International Science Festival, Edinburgh Jazz and Blues Festival, Edinburgh Mela, Edinburgh’s Hogmanay, Royal Edinburgh Military Tattoo and Scottish International Storytelling Festival.

⁴ AEA Consulting (2006) *Thundering Hooves: Maintaining the Global Competitive Edge of Edinburgh’s Festivals*



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APPENDIX: QUOTES FROM STAKEHOLDERS

Councillor Steve Cardownie, Festivals and Events Champion for the City of Edinburgh, said:

"From the Festivals Strategy in 2001 to the Thundering Hooves report in 2005, we have long known that our Festivals are the lifeblood of Scotland's Capital city. They enable Edinburgh to reach out to the rest of the world and greatly enrich the lives and cultural experience of our own residents.

"The Festivals are rightly a tremendous source of civic pride, both locally and nationally, and this study perfectly demonstrates how greatly they enhance the quality of life of Edinburgh citizens, as well as giving a huge boost to the City economy.

"While of course we cannot be complacent, this research once again reinforces Edinburgh's position as the preeminent global Festival City. The study's findings can now be utilised to promote all our Festivals, to help develop new partnerships and generate new innovative strategies in the years to come."

Paul Bush OBE, Chief Operating Officer for EventScotland said:

"Edinburgh's Festivals lie at the heart of Scotland's reputation as a world leading events destination. Their economic, social and cultural impacts, captured for the first time in this ground breaking study, demonstrate the wide range of benefits they deliver for Scotland.

"Collectively Edinburgh's Festivals are a truly global cultural brand which showcase Scotland as the perfect stage for events. Welcoming visitors all year round, the Festivals generate significant economic impact for Scotland providing a world class platform for both Scottish culture and international artists."

Lena Wilson, Chief Executive, Scottish Enterprise, said:

"Edinburgh's Festivals are undoubtedly one of Scotland's unique tourism assets and this latest study underlines not only the importance of the festivals in an economic context, but the impact that they have on a social, cultural and environmental level.

"The Festivals deliver a wide range of benefits to a number of Scotland's key priority sectors such as the creative industries and tourism sector and really help to give Scotland a distinctiveness that sets itself ahead of competitors. These findings will provide a sound basis on which to enhance and further develop Edinburgh's festival offering to ensure we continue to compete as one of the top destinations in the world."

Andrew Dixon, Chief Executive, Creative Scotland, said:

"This ground-breaking research confirms that the Edinburgh Festivals play a vital role in inspiring audiences to seek out new creative experiences."