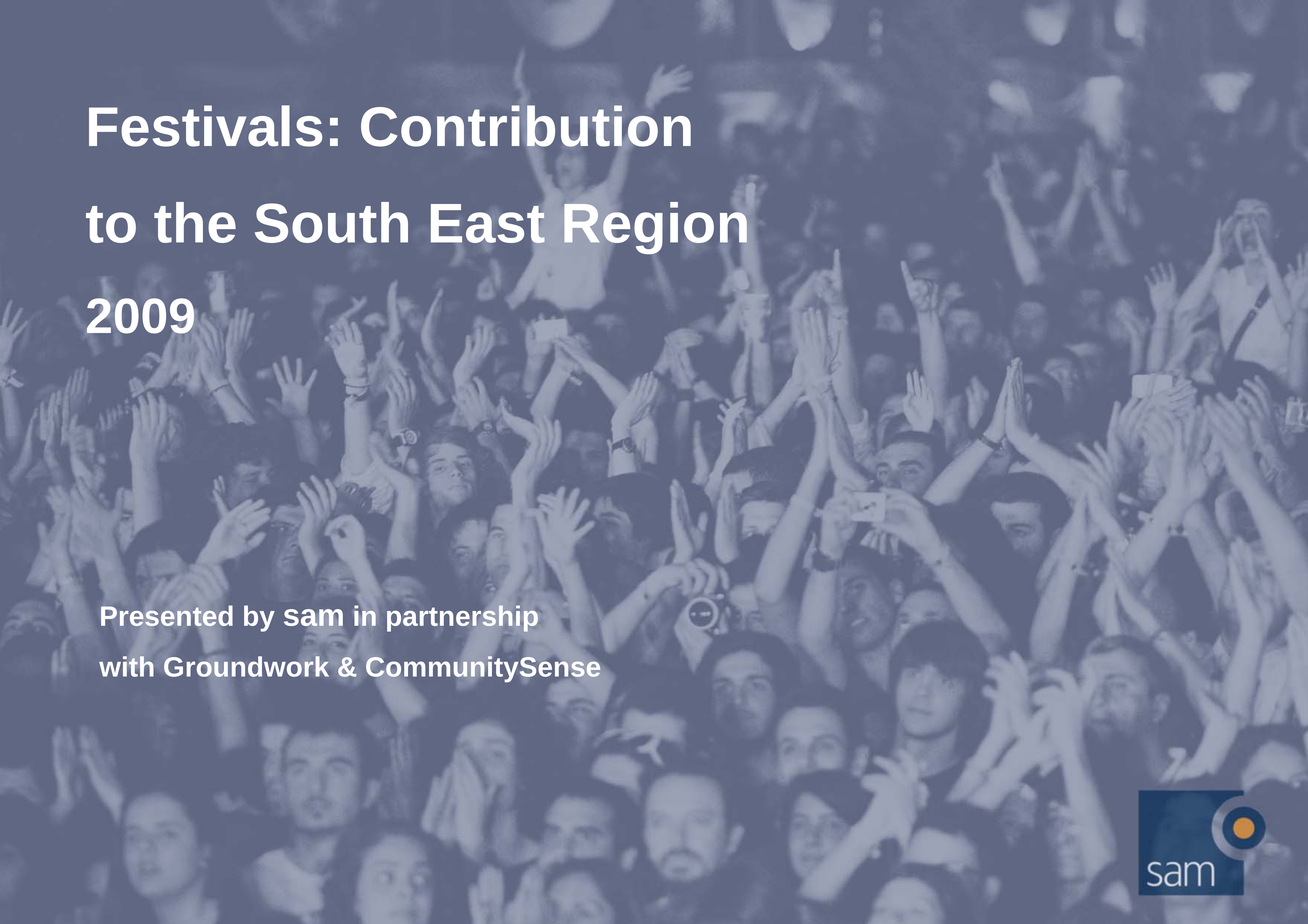

Festivals: Contribution to the South East Region 2009

Presented by sam in partnership with Groundwork & CommunitySense

Contents

Introduction

The Purpose of this Study

SEEDA commissioned this study in recognition that the cultural and creative assets represented by festivals provide a unique competitive advantage for the South East Region and contribute to its identity as well as to its economic base.

The Regional Economic Strategy for the South East defines culture and the creative industries as a cross cutting theme, integral to the region's success in enterprise, creativity, skills and sustainable prosperity. However, in this time of economic downturn it is essential to have a robust body of evidence on the contribution made to the region's economy by the festivals sector, as a foundation to support strategic decisions and to inform investment priorities. SEEDA and Arts Council England have applied this successful "business clustering" approach to support two Festival Cluster Pilots –in Brighton and in East Kent - in order to develop their competitive position.

The data set out in this study is based on responses to a quantitative survey together with interviews with festival directors and key stakeholders in local authorities and funding bodies.

This study provides:

- definitions and overview of the scope and scale of cultural festivals in the South East, their geographic distribution; scale; seasonality; and value
- an assessment of the contribution made by the festivals sector to the South East economy
- a sector view on the impact of the current economic downturn on their business
- scenario exploration of the impact of the recession upon the sector

Executive Summary

- Estimated levels of visitor spend generated by festivals in the South East, which benefits respective local economies, show an indicative total economic contribution of £503m

- The survey identified 323 individual events in the South East

- Little evidence on the economic, social and cultural impacts of festivals is available from the sector

- The main economic impact of festivals is generated through secondary and tertiary spend in the local economy on goods and services (accommodation, food and drink, retail and transport) by festival attenders

- Very few festivals have evidence of their value. In 2008, average expenditure of large sized festivals was over £230,000, medium sized festivals expenditure averaged around £173,000 and small festivals spent an average of just over £37,000

- The festivals sector is dominated by small, relatively low-value festivals, community based events which add to sense of place and community cohesion but are not necessarily economic drivers within the cultural economy.

- The sector has seen growth over the past ten years but this is resulting in congestion and replication of product rather than differentiation and raises issues around festivals competing for resources / funding

- **Two main business models**:
  - a commercial model which draws from a mixture of income sources – ticket sales, commercial sponsorship and where appropriate public sector support
  - a model more dependent upon the public sector and trusts and foundations, often used for free or Local Authority led events.

- **Main benefits of festivals:**
  - Impact on the cultural system
  - Cultural leadership
  - Supporting an entrepreneurial culture
  - Catalysts for cultural networks and related cultural industries
  - Purchase of goods and services from other industries
  - Impact on the supply chain of the cultural industries
  - Contribution to region’s image, identify and brand

- **Audiences**: there is no correlation between size of turnover and size of audience numbers.

- **Employment generation:** measured across all festivals, average job creation for all types of employment was equal to 75 jobs per festival, providing an indicative figure of employment generated by all 335 regional festivals in the order of 25,000 positions. These are mainly voluntary positions, then temporary position with only a few being permanent positions

- **Large music/free festivals** attract the highest levels of support across all identified categories, with an average total investment value of £21,797 per large free festival per annum

This trend emphasises the relative dominance of large free festivals in attracting and securing investment from a range of sources and highlights a possible need for additional support to medium and small free festivals to increase the level of funding secured in future, which is likely to be particularly relevant during the current economic downturn

- **Competition between festivals** for funding, audiences and profile will increase as resources become scarcer. Festivals which are reliant on a single stream of income or one major sponsor are particularly at risk

- A **decline in the levels of corporate sponsorship** plus decline in support from trusts and foundations is also affecting festival income. Rising production costs and loss of sponsorship in kind create challenges

- **Preparation and planning** - only a very small number of festivals are undertaking future planning to mitigate the financial circumstances likely to be more visible later this year

- **Components of change**:. A number of key components to assess anticipated effects of the current downturn on festivals across the region have been identified, including:
  - Job cuts
  - Reduced financial backing (public/private)
  - Reduced visitor numbers
  - Reduced visitor spend
  - Increased direct costs
  - Increased competition among festivals
  - Reduction in the size/scope of festivals
  - Amalgamation between festivals
  - Potential decline in available artistic product to present

Mitigating the Effects of the recession: recession proofing and support for the festival sector

The current mixed business model of grants, corporate sponsorship and earned income may need to rapidly develop to meet the UK's changing economic conditions. Development may include a more even spread of revenue streams across the business model, or a realignment with the streams which have the greatest viability.

i. The traditional models of governance through festival boards and committees may not always have the level of financial and business skills to ensure sustainability in a time of change.

ii. There is far greater potential for festivals to develop collaborative strategies and approaches to building audience levels, increasing participation and expanding into new markets.

iii. Sector growth is hampered through limited knowledge exchange and workforce development.

iv. Is it time to broker strategic alliances between organisations, both to build skills, share expertise and market intelligence and perception of trends and change in the operating environment?

Clusters: Festivals are not functioning within the recognised models of business clusters, in terms of sharing product and economies of scale due to their need to maintain distinctiveness.

Whilst they may share the same geographical location, there is often little synergy between them.

SEEDA Festivals Cluster Continuation Options

Background

This research highlighted an apparent lack of data and understanding among second-tier festival organisers about the full economic and social impacts of their festival offer.

Proposed activities include

Mapping discrete economic, social and cultural benefits associated with a select case load of twelve second-tier festivals across a range of different sizes and types

Outcomes

- Establish an accurate context relating to economic, social and cultural contributions of second-tier festivals
- Clearly identify how SEEDA support should be targeted to achieve greatest benefit and secure maximum value for money
- Establish a baseline, against which primary and secondary benefits associated with SEEDA support can be readily evidenced
- Set the foundation for a ‘virtual festival cluster’ among second-tier festivals in the region

Festivals: their contribution to the South East Region

What is a Festival?

A festival can be defined as

"*A series of performances of music, plays, films/movies, etc., usually organized in the same place once a year; a series of public events connected with a particular activity or idea*"[1]

"*An often regularly recurring program of cultural performances, exhibitions, or competitions*"[2]

"*An organized series of special events and performances*"[3]

In line with the brief for this research we have included only events that have a programmed cultural element (as defined by the DET[4]), where this element forms a significant proportion of the overall activity.

We have excluded sport and food related events and ones which serve a wider social purpose such as religious festivals.

"Festivals are the type of event which are needed at this time to hold up the nation's morale, we do not want to see all the pleasurable things valued by communities disappear"[5]

The South East in Context

The economy of the South East has been classified as being advanced, high cost, high income, broadly based and service oriented. Measured by GVA per head, the South East is currently the second most prosperous region in the UK behind London.

This favourable comparison to other English regions continues across a number of indicators such as income, with household disposable income 9% above the national average, despite the region being the most populous in the UK, with approximately 8 million people.

The South East economy is worth around £177bn. As an international transport hub, the South East hosts all major industries including pharmaceuticals, biotech, healthcare, ICT, high-tech engineering, digital media, environmental technology, aerospace and electronics.

Levels of employment in the South East are amongst the highest in the country and unemployment continues to be low by national standards. However, this general picture disguises considerable variation within the region. Government statistics show that areas of Kent and the South Coast have above average levels of economic and social deprivation, particularly in Hastings, Brighton & Hove, Southampton and Medway.

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1 Oxford University Press Dictionary, 2005
2 The American Heritage Dictionary of the English Language, Fourth Edition. Updated in 2003
3 Collins Essential English Dictionary 2nd Edition 2006
4 DCMS Evaluation Toolkit, 2004
5 Sally Staples Head of Arts Development Kent Arts Development Ltd, 2009

The varied geography and diversity of location across the South East provides both a backdrop and a stimulus for festivals and events.

- **Natural Assets and Diversity of Landscape**
  The extensive coast and the rural areas and countryside have been a stimulus for the development of many celebrations and festivals

- **Heritage**
  Many festivals have evolved in response to historic sites (Chichester Festivities, Arundel Festival, and Charleston Festival) or to aspects of cultural heritage (Rochester Sweeps Festival, Thomas Paine Festival, Jack in the Green). Heritage sites are also provide locations for festival events, such as outdoor concerts

- **Cultural Venues**
  A range of iconic new buildings (Towner, Eastbourne; De La Warr Pavilion, Bexhill; Pallant House Gallery, Chichester; Turner Contemporary, Margate) and newly renovated cultural venues and developments (Folkestone Creative Quarter) are providing new opportunities to develop or host festivals and events which add significantly to area profile.

- **Transport and Access**
  The proximity of the region to London and the transport infrastructure of major airports and ports provide a significant advantage for accessing visitor markets from London. However, road and public transport links cross country are poor.

- **Image of the South East**
  Whilst there is not an overall identifiable brand for the region as a whole, research by Tourism South East determines that there are several places in the region which are widely recognised for the strength of their brand and profile, including Winchester, Oxford, Kent and Canterbury, Brighton and Sussex and Chichester. Tourism South East also supports the aspiration and regeneration of other South-East towns.

"Rundown resort hopes to turn tide with triennial featuring top artists. This is not the Folkestone I remember from when I grew up in the 1970s and 1980s. This is an English seaside town that breathes creativity as deeply as it does the saline air that blows in from the Channel." [6]

[6] The Guardian, 26.09.2007

Festivals and the South East

The South East is notable for the scale and variety of its festivals, taking place all over the towns, cities and rural areas of this region.

They range from major cultural events, developed over a period of time with international reputations, attracting a large number of festival goers and substantial media coverage to small events and celebrations rooted in their local communities.

It is estimated that one third[7] of the UK's festivals are based in the South East and that they form a significant strand of the region's cultural offer.

Festival are referenced in the cultural plans, strategies and local area agreements of many of the region's Local Authorities (LA's), noting the contribution they make to the delivery of LA objectives from community cohesion to supporting the visitor economy and local economic development.

The South East hosts some of the UK's most important festivals – Brighton Festival; Garsington Opera; Glyndebourne Festival Opera; Oxford Literary Festival; Reading Festival and the Isle of Wight Festival.

[7] Richard Russell, Director of External Relations and Development, Arts Council England South East

South East’s Festival Offer - Dimensions

Numbers

The survey of festivals based in the South East region identifies 323 individual events; most of which take place on an annual basis, with a very small number of biennial and triennial events.

The South East region is often divided for administrative purpose into four sub regions:

BOB
Berkshire, Oxfordshire and Buckinghamshire
(Including Bracknell Forest, Milton Keynes, Reading, Slough, Windsor and Maidenhead, West Berkshire and Wokingham)

HIOW
Hampshire and the Isle of Wight
(Including Southampton and Portsmouth)

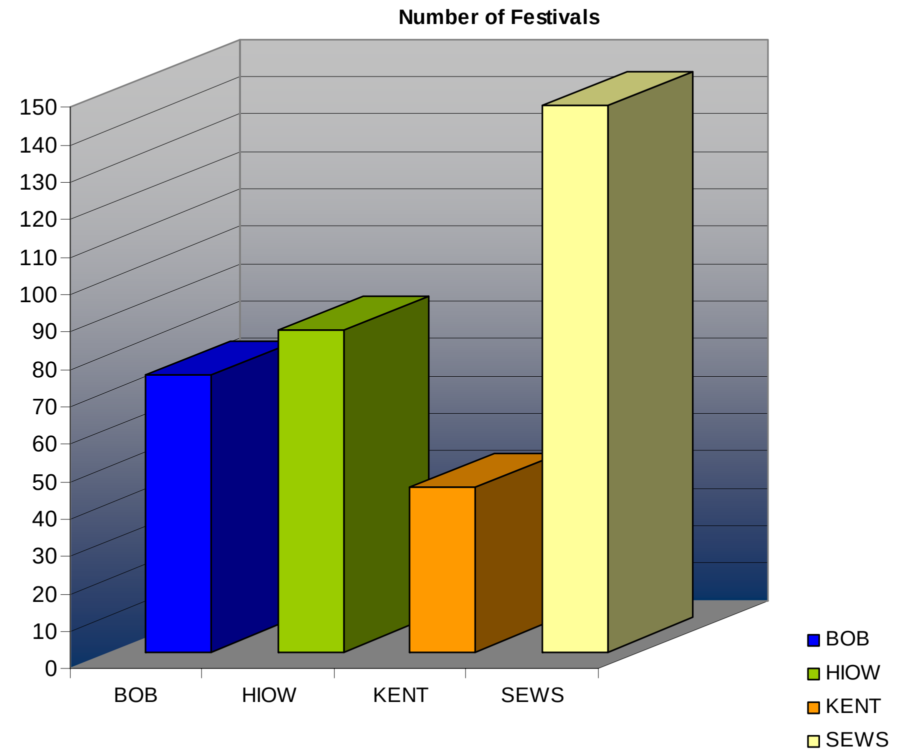
KENT
Kent
(Including Medway)

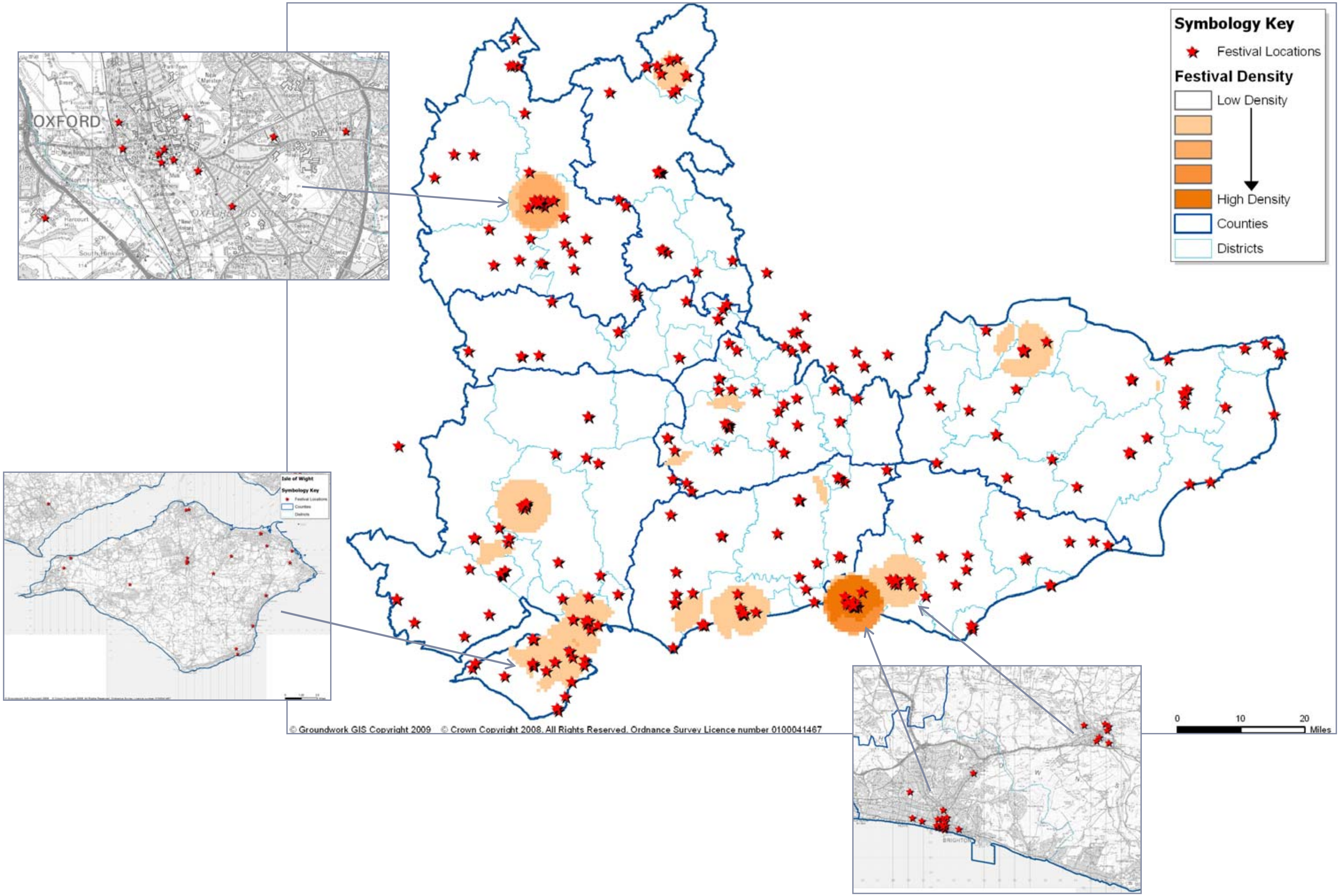
SEWS
Surrey, East and West Sussex
(Including Brighton and Hove)

	Local Authority	Festivals
BOB	Bracknell Forest	3
	Buckinghamshire	12
	Milton Keynes	12
	Oxfordshire	36
	Reading	2
	Slough	2
	Windsor and Maidenhead	2
	West Berkshire	2
	Wokingham	3
HIOW	Hampshire	35
	Isle of Wight	22
	Portsmouth	2
	Southampton	6
KENT	Kent	44
	Medway	3
SEWS	Brighton and Hove	37
	Surrey	36
	East Sussex	28
	West Sussex	40

The table above shows how active each sub-region is in terms of the numbers of festivals each contains.

SEWS has the greatest number of festivals, with West Sussex having joint highest numbers for a county authority and Brighton and Hove having the highest number for a unitary authority.





OXFORD
Symbology Key
Festival Locations
Festival Density
Low Density
High Density
Counties
Districts
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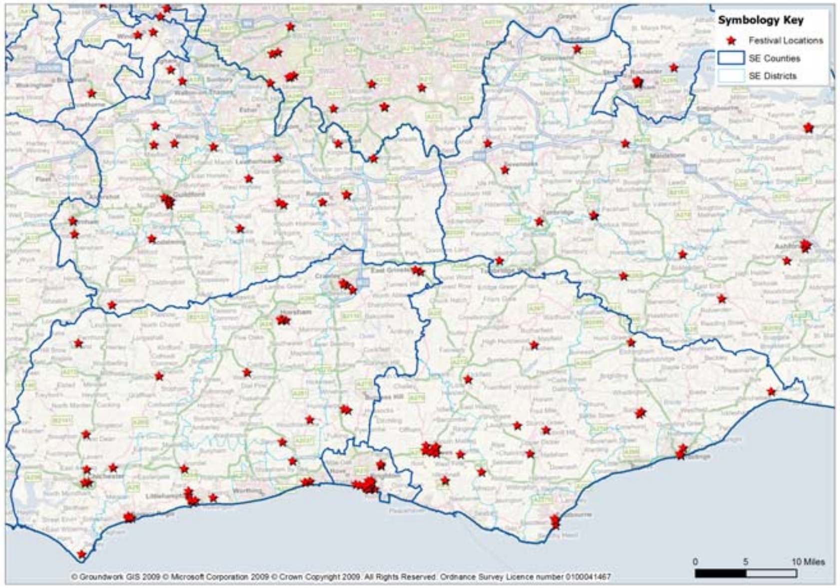
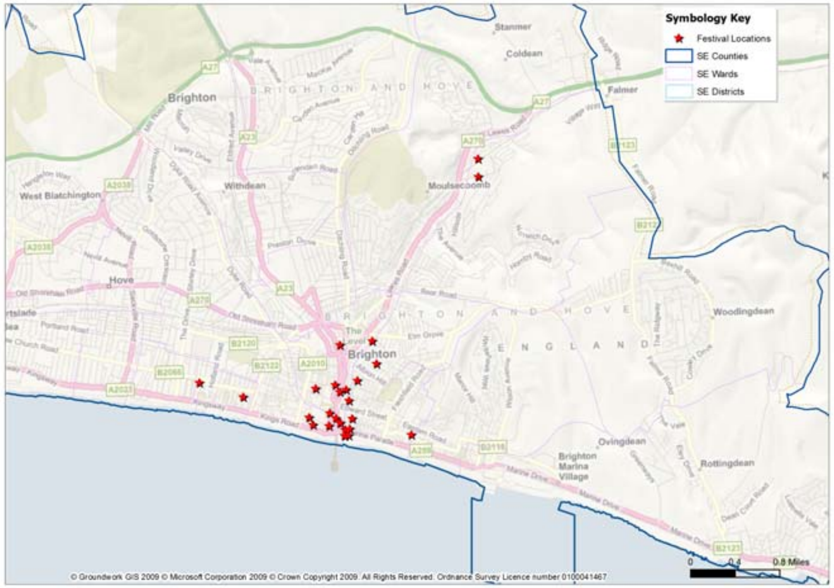
0
10
20
Miles

Festivals in Surrey, East & West Sussex (detail)

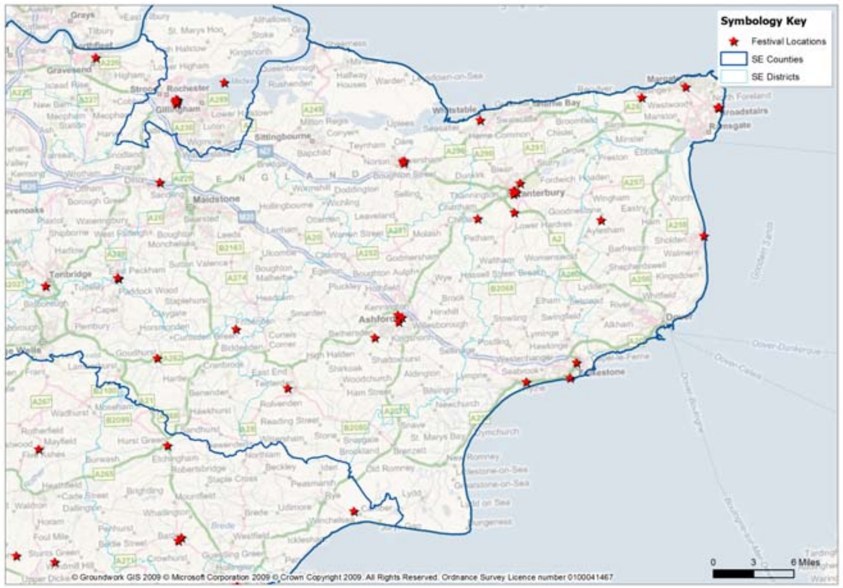


Festivals in Kent (detail)

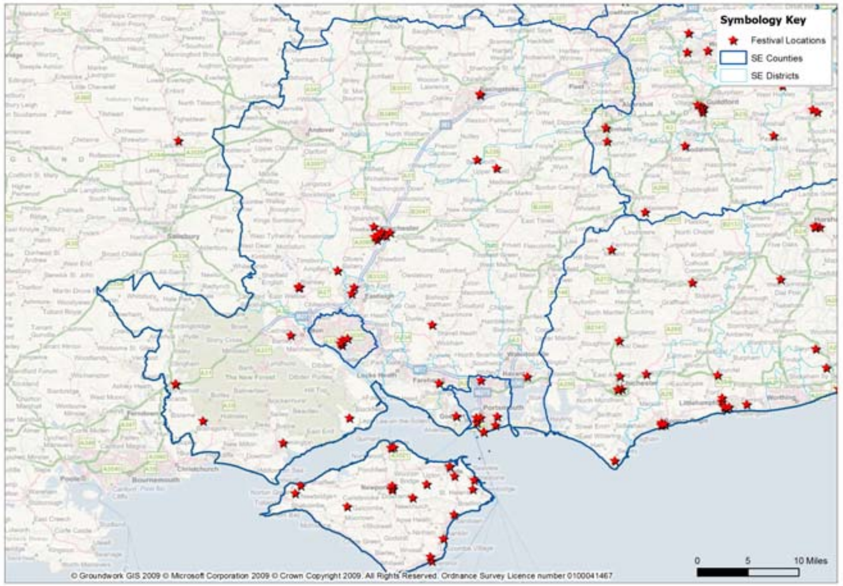
Festivals in Brighton & Hove (detail)



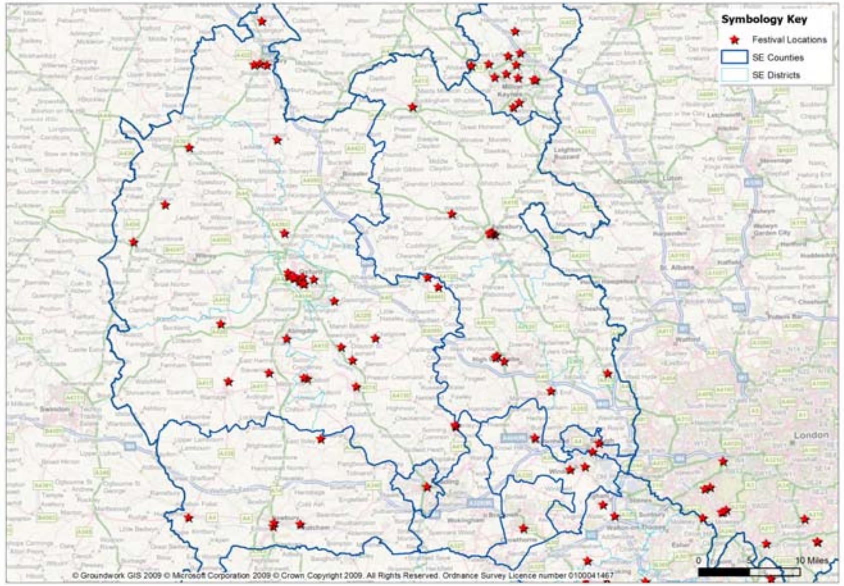
Festivals in East Kent (detail)



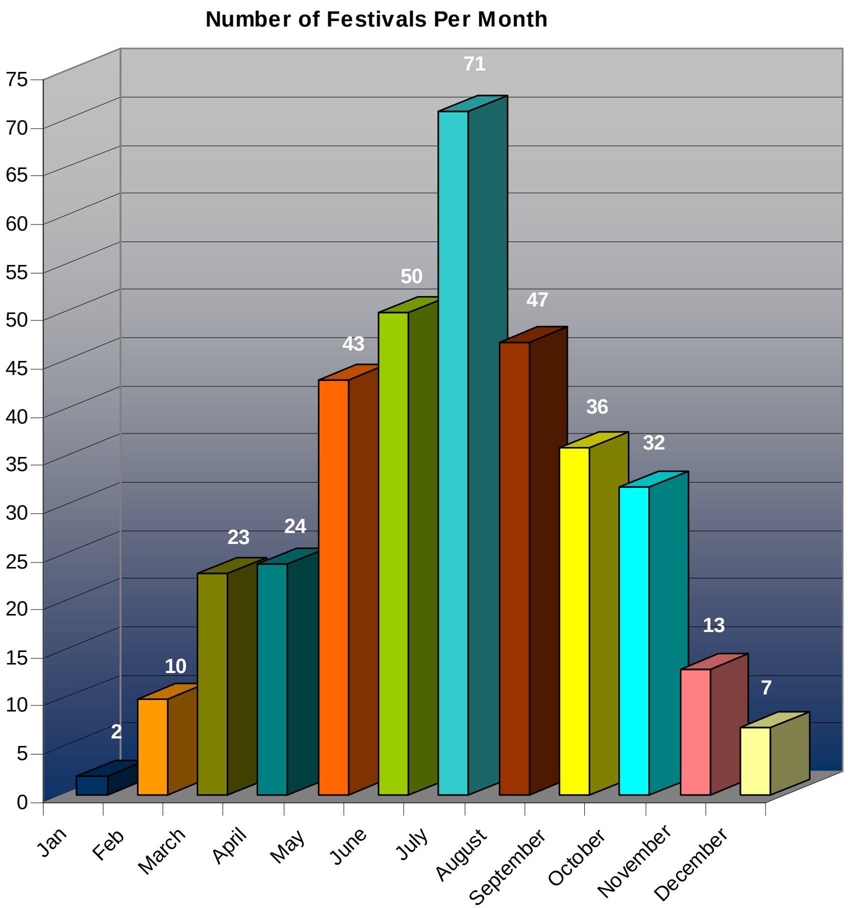
Festivals in Hampshire / Isle of Wight (detail)

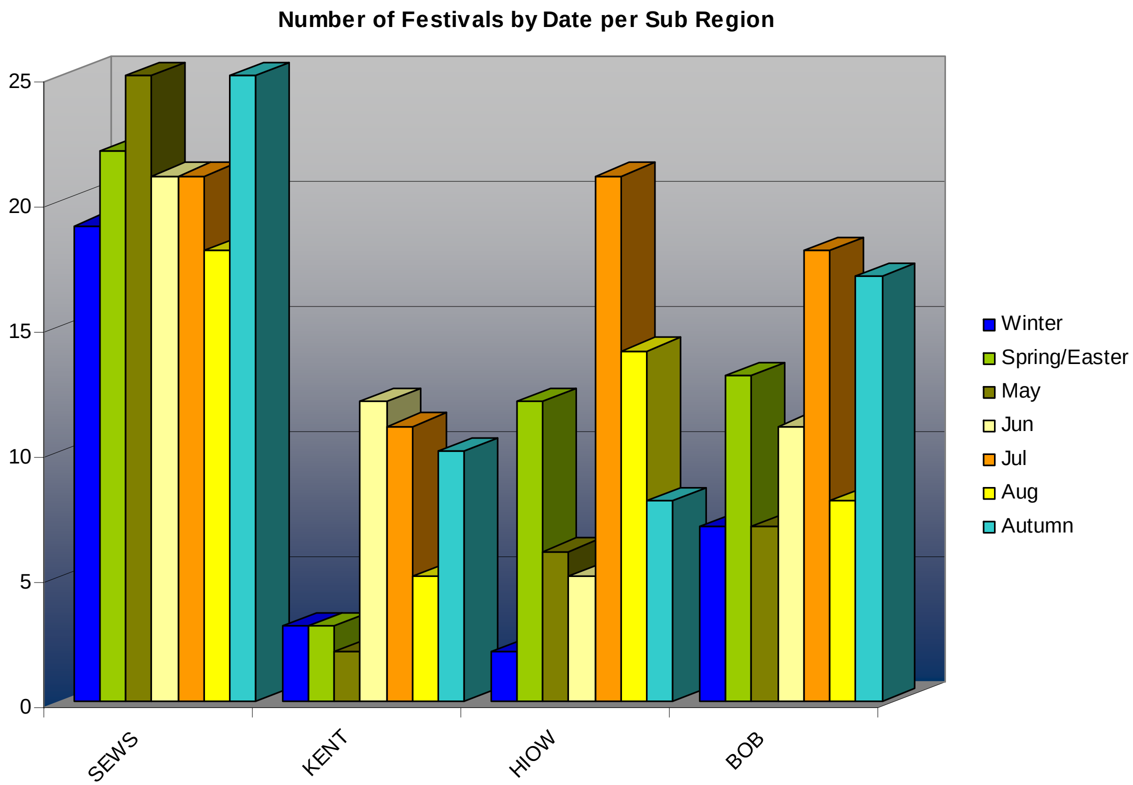


Festivals in Berkshire, Oxfordshire & Buckinghamshire (detail)



South East Festival Calendar

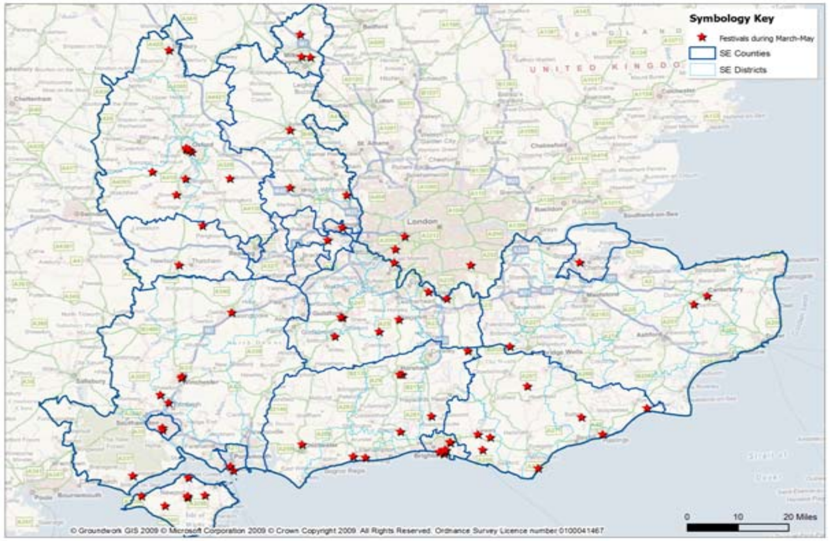




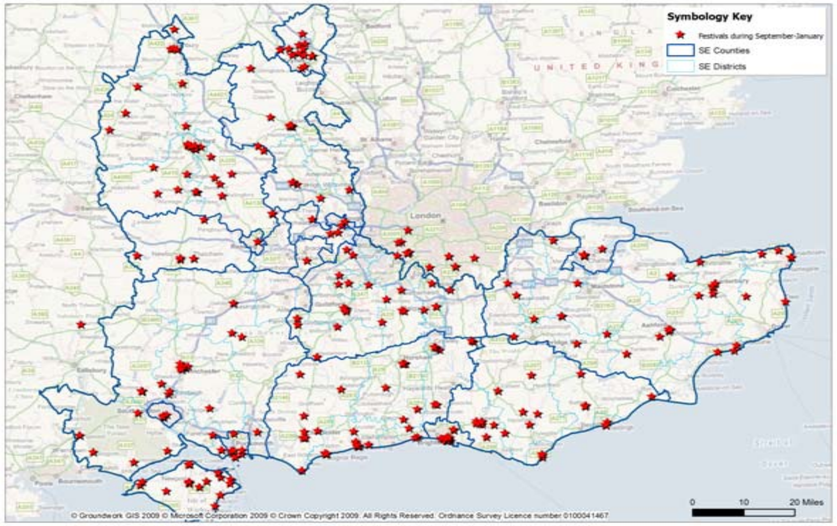
The majority of South East festivals operate May to August, with about a third of the total taking place in the early Spring and early Autumn shoulder months.

There appears to be some strong sub-regional trends appearing. SEWS has the strongest year round offer, particularly in the early period of the year and the Autumn. KENT has very little activity before June. HIOW shows strong numbers for the Spring/Easter period and July, whilst BOB has low numbers for August and May.

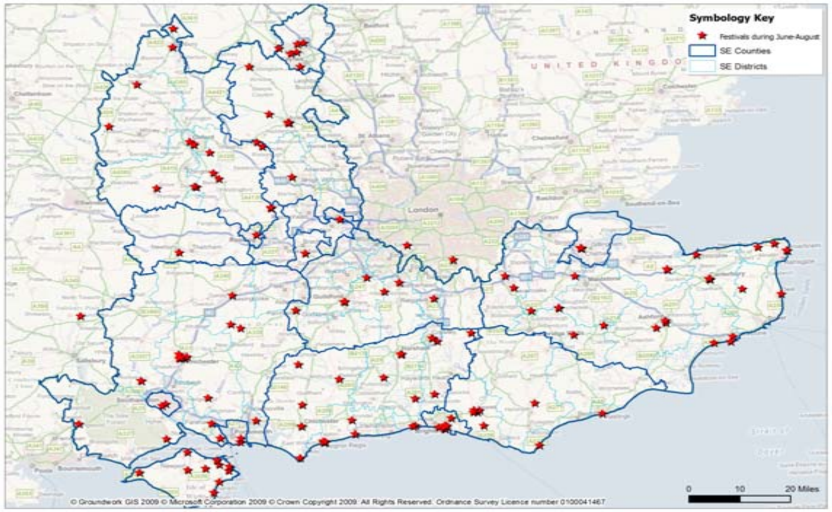
South East Festivals March to May



South East Festivals September to February



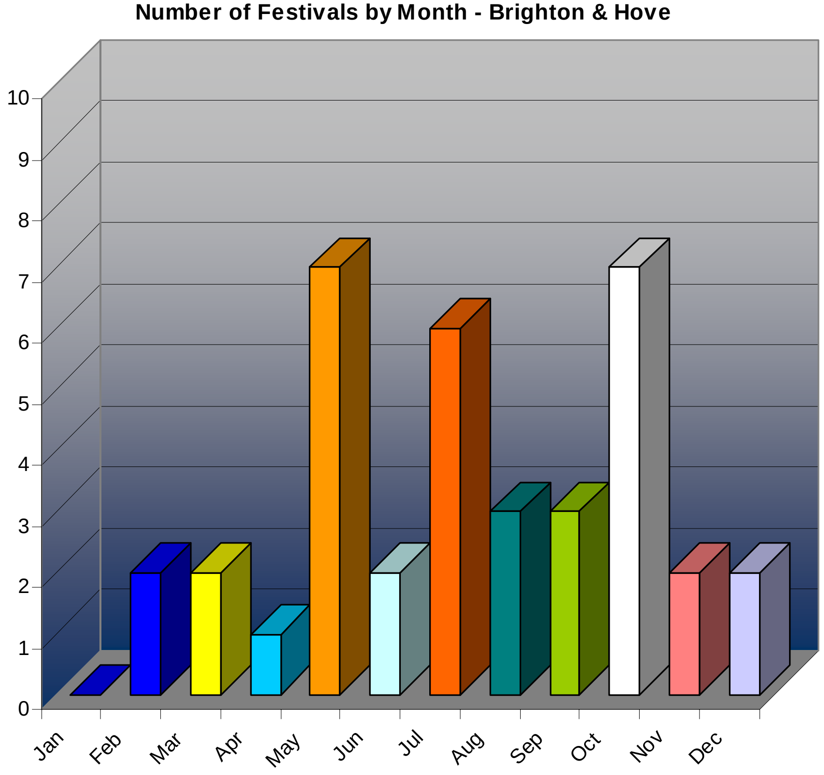
South East Festivals June to August

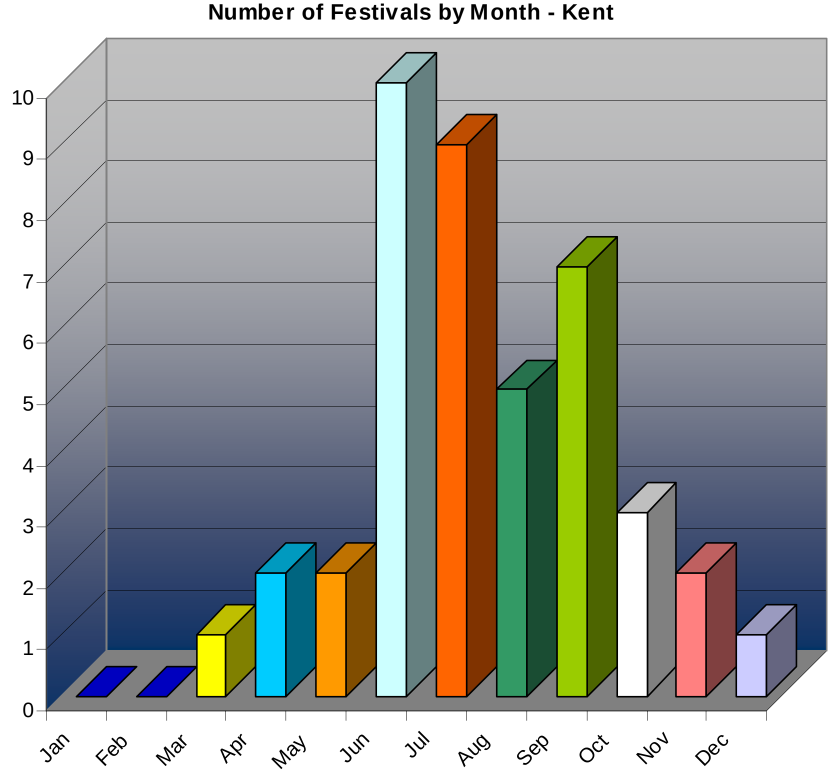


Festivals held between September and February are most likely to be primarily indoor events whereas festivals during June to August are likely to focus on outdoor performances.

Outdoor events, which are proportionally more likely to be free to attend, are also weather dependent. Without the commitment of a ticket purchase, attendance at these events is spontaneous and audience numbers can be unpredictable.

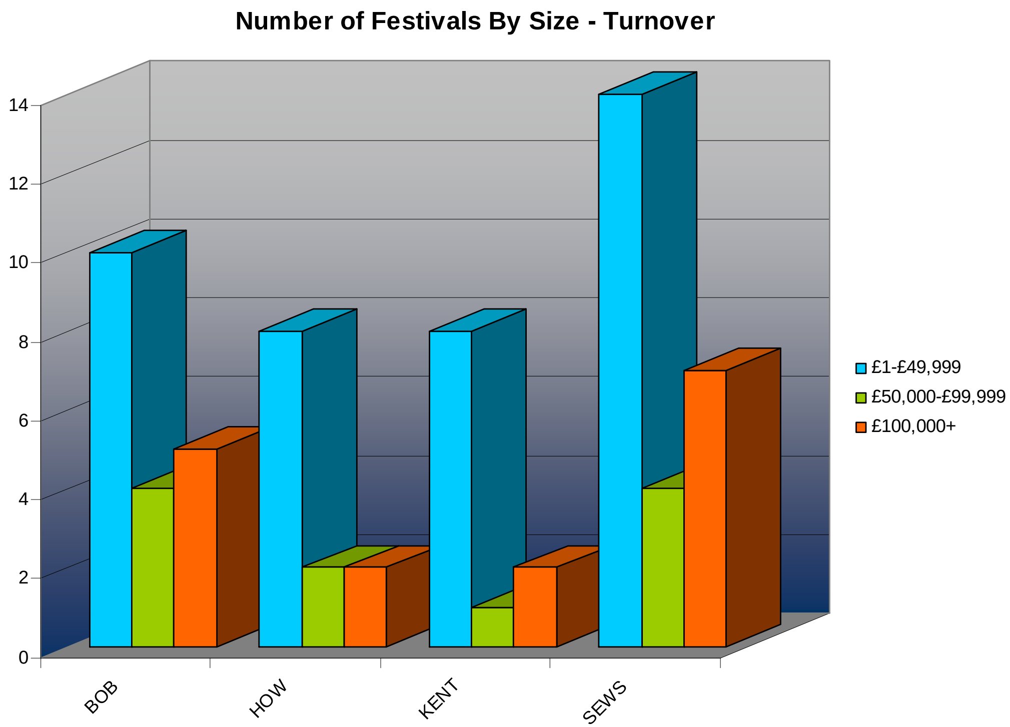
South East Festival Calendar (Brighton & Hove and Kent Clusters)





Make-up of Festivals in the Region

The numbers of festivals present in each sub-region can in itself be a misleading statistic. In order to comprehend the potential of the festival sector it is important to identify where there is a critical mass of organisations that are capable of producing a significant contribution to the South East's economy.

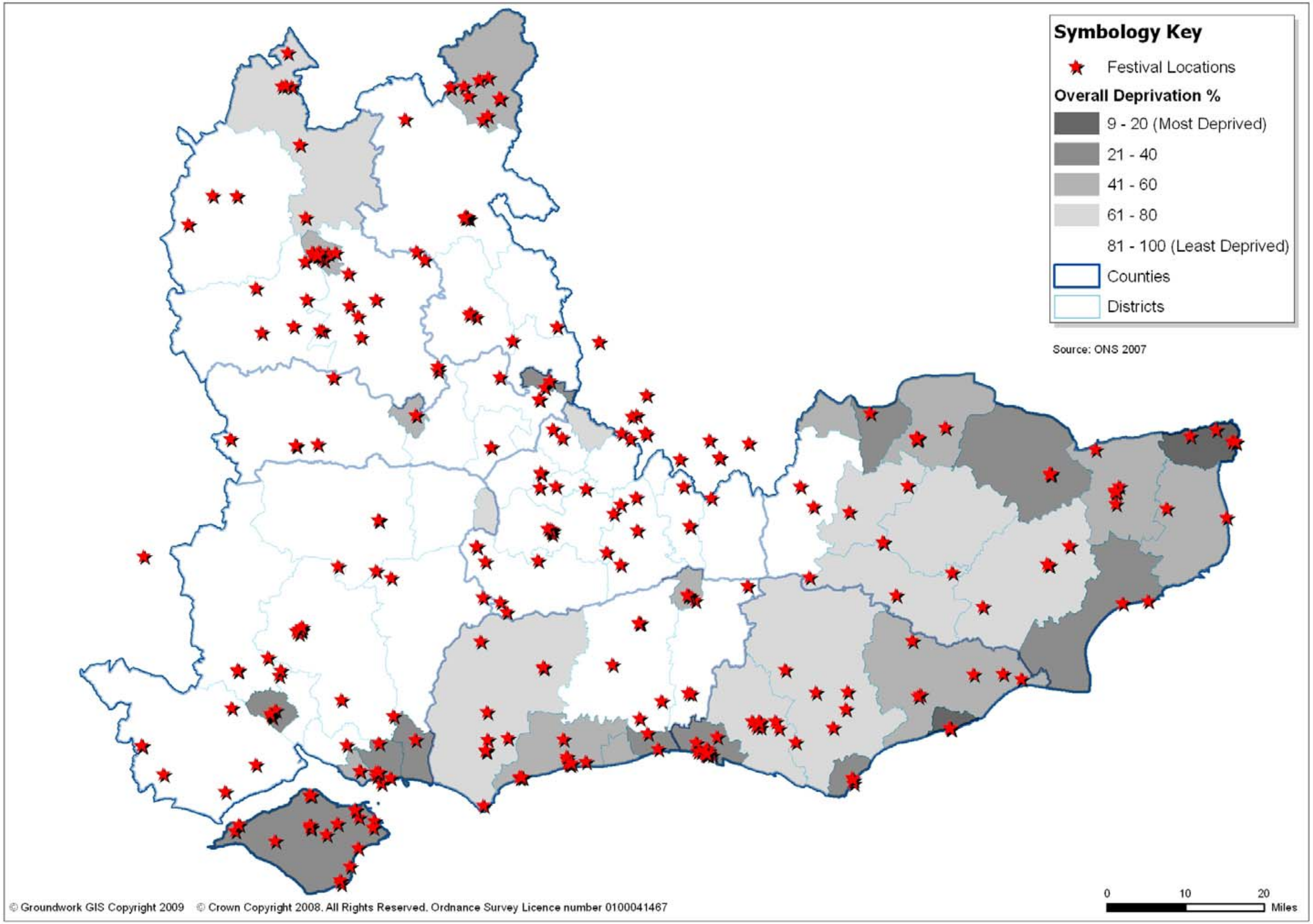


The chart opposite reports upon the survey returns from participating festivals. Whist the level of returns was just under one-third of the entire sector there is enough data to make some indicative statements.

The sector appears to be dominated by small, relatively low-value festivals across all of the sub-regions. This is symptomatic of the large numbers of community focussed events that take place in the region and while importantly adding to sense of place, community cohesion and placemaking they should not necessarily be viewed as economic drivers within the cultural economy.

What they do add is numerous opportunities for professional development and product development as well as creating a myriad of different entry points into the sector for future employment and volunteering. Without these smaller festivals there would be too few opportunities for performers and artists to showcase their talents or make a sustainable living from their practice.

The small numbers of medium sized festivals should be viewed within the context of the survey timeframe and the nearness for many to the start of their event. This study comments later on the different staff models adopted by different sizes of festival; medium sized festivals tend to have a small professional staff (part-time and full-time) who have an intensive work load, often without the resources to purchase professional services from external suppliers.


Symbology Key
Festival Locations
Overall Deprivation %
9 - 20 (Most Deprived)
21 - 40
41 - 60
61 - 80
81 - 100 (Least Deprived)
Counties
Districts
Source: ONS 2007
0
10
20
Miles
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The map on the previous page places the South East's festival offer over each district defined by the levels of deprivation present.

The impact of large festivals such as the Isle of Wight Festival and Bestival becomes more apparent when they are seen within the context of the high deprivation indices for the Isle of Wight. These big events bring tens of thousands of festival goers to one location producing an important positive impact upon local businesses.

Anecdotes from different blogs and online forums illustrate how specific events can prove a critical factor in cementing the medium to long-term sustainability for small and medium sized businesses working across the hospitality and accommodation sectors.

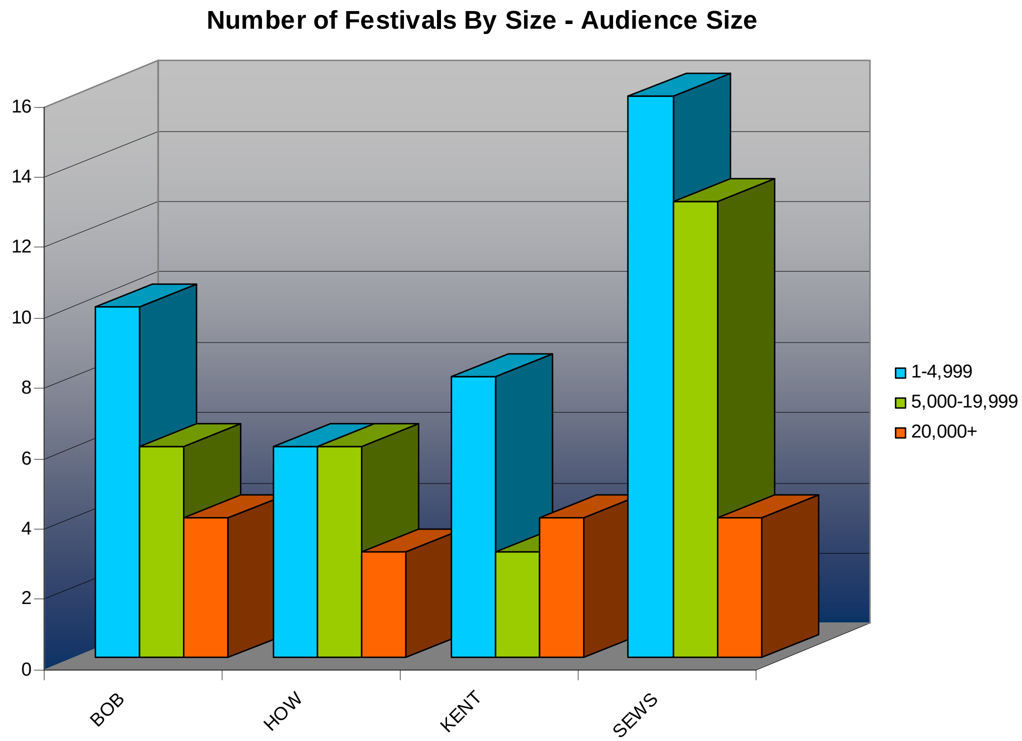
It should be noted that we have not included the very small community festivals on the basis that these are primarily community events rather than programmed events with cultural and artistic aims.

Audience Sizes

There is not a routine correlation between size of turnover and size of audience numbers.

Not all of the largest festivals (in terms of turnover) were present in the cohort of 20,000+ attendances.

In SEWS 3 of the 7 largest festivals had less then 20,000 attendances, while in KENT and HIOW 3 of the medium sized festivals were present in the largest attendance cohort.



Festivals and the Visitor Economy

For some places in the region, festivals make a significant and positive impact.

In Brighton, for example, cultural events are drivers for the visitor economy and support positive perceptions of the destination. For others whose economies are not so closely dependant on the visitor economy, festivals play a different role – providing access to the arts and world culture, building social cohesion and local identity.

In the current economic climate, when it is unlikely that we will see (in the short-term at least) new capital developments - events and festivals become even more important in attracting people to the region's towns and cities. Whilst established events are struggling to maintain their position, new events are experiencing difficulties in securing a share of limited revenue opportunities.

Places such as Oxford have recognised the importance of their many festivals, defining them as a development priority. They are viewed as "economically useful", creating a valuable amenity at the local area level and celebrating and adding to the distinctiveness of particular localities. Oxfordshire County Council's Community Strategy, up to 2013 has set a tourism target of developing five new festivals by 2012. The aim is to move the county visitor economy from day visitors to independent staying visitors and festivals are seen as a good lever in effecting this change. Resources to support this development are through a Local Area Reward Grant.

Although some festivals are seen as playing an important part in shaping the South East as a visitor destination lack of investment in festivals often prevents them realising their potential economic contribution.

"*Festivals are a vital component of the visitor economy in the South east and we have an impressive range and variety. They bring wealth to the local economy , especially when they take place outside the peak visitor season and are a major contributor to the region's sense of place , But they have the potential to make considerably more impact .Many are not promoted beyond their immediate vicinity and yet would have appeal to visitors , including international visitors. We also need to ensure that the region develops an appropriate infrastructure in accommodation and transport to maximise the potential of their economic benefits.*"

Mark Dowling, Head of Development and Urban Regeneration,
Tourism South East

Social and Cultural Impacts

Although this study is primarily focused on the quantifiable economic dimensions of festivals in the South East, to view them solely from this perspective would be to undermine the broader contribution they make to the social and cultural life of the region and its profile as a destination to live, work or visit.

Research into the benefits of festivals by Carlsen[8] sets out that we need "*to move beyond economic impacts in order to understand the complex and comprehensive set of benefits and dis-benefits associated with festivals*".

Festivals have direct and indirect impacts on their communities both through the opportunities they provide for participation, skills development through volunteering as well as environmental and political impacts.

Andrews[9] in assessing the impact of the cultural festivals programme linked to the Commonwealth Games outlines how festivals "*address social changes at personal and organisational level, such as better understanding of cultural differences, new and positive experiences for the audience and personal and organisational learning*". These other less quantifiable benefits to the local economy include the trading opportunities festivals provide for not-for-profit organisations and the contribution they make to the year-round economy in terms of:

- Impact on the cultural system
- Cultural leadership through the philosophy and management and direction of festivals
- Supporting an entrepreneurial culture
- Catalysts for cultural networks and related cultural industries
- Purchase of goods and services from other creative industries
- Impact on the supply chain of the cultural industries (for example the music festivals in Brighton have played a considerable part in contributing to the city's successful music scene)
- In addition they contribute to the image, identity and brand of places

8 Carlsen, Ali Knight, Robertson: 2007 ACCESS: A Research Agenda for Edinburgh Festivals. Event Management 11(1/2)

9 Andrews:2003 Culture Studies XVII Commonwealth Games North West Evaluation Report: Impact on Organisations , Audiences and the City and Region

"*The many benefits that festivals contribute make them important to the South East region. Festivals which are genuinely artistically distinctive make a real contribution to the region's cultural offer.*

For example, Brighton Photo Biennial has a very distinctive offer through the strength of its artistic programme. It has shown strategic progress in its development and the next Biennial will be of a scale and size to render it internationally important."

Richard Russell, Director of Strategy and External Relations, Arts Council England South East

Economic Impact of Festivals

The Economy of Festivals – An Overview

In order to understand the economic significance of festivals and the likely impact of the recession on the sector an overview of the business dynamic of festivals is helpful.

In general festivals have developed a myriad of variations based upon two distinct business models.

The first is closely aligned with a recognisable commercial model which draws from a mixture of income sources - tickets sales, commercial sponsorship and where appropriate public sector support.

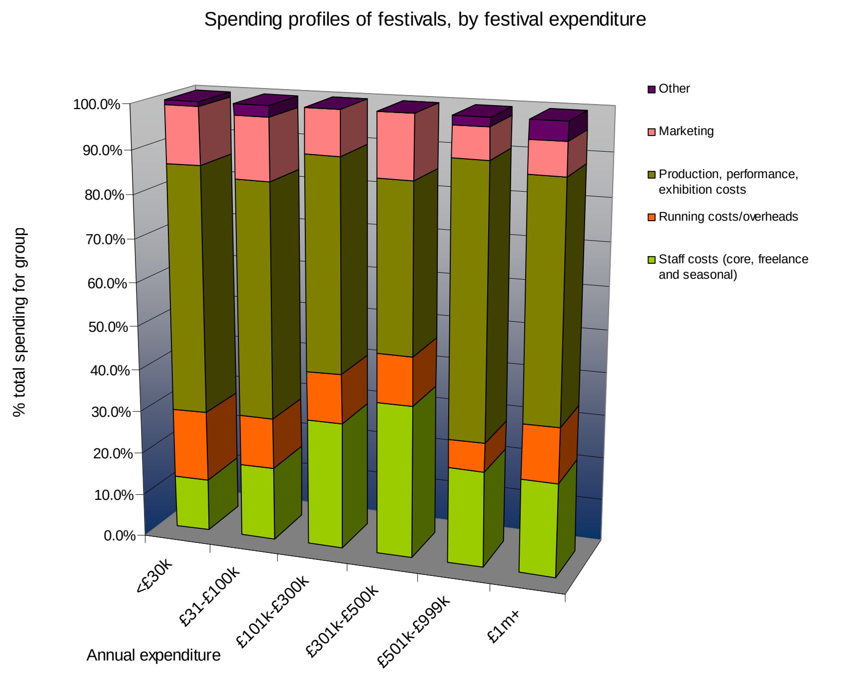
The second is more dependent upon the public sector and trusts and foundations. This model is often used for free or Local Authority led events.

A study[10] "Festivals Mean Business (Spring 2008), published by the British Arts Festivals Association (BAFA), assessed the contribution made to the UK economy by the festival sector.

This report calculated[11] that the average per capita cost of producing a festival in England was £7.40. This rose to £8.54 in the South East. Regions such as London were recorded as costing considerably less, £4.45.

[10] Festivals Mean Business 3, March 2008
[11] Based upon 193 festivals

By looking at the festival spending profiles certain trends were identified for festivals of similar sizes.



The graph[12] above shows the proportion of income spent on five major expenditure areas by festivals of different sizes, as defined by their turnover.

[12] Festivals Mean Business 3, March 2008

Small Festivals

Smaller festivals with an annual expenditure of less than £100k spent 55-60% of their turnover on production costs. Marketing accounted for between 13-14% of all expenditure.

Medium Festivals

This trend continued for medium-sized festivals with an annual turnover of between £101k- £500k. These festivals reported a much higher proportion of spend on staff costs, 30-35% (up to 23% greater share of spending compared to smaller festivals). This accounted for a significantly reduced proportion of spend on production costs compared to smaller festivals. Running costs and marketing costs accounted for approximately the same proportion of expenditure as smaller festivals. There is significant potential for growth in this scale of festivals.

Large Festivals

At larger festivals with an annual expenditure of over £501k, staff costs accounted for up to 14% less of overall spending compared to medium-sized festivals. Running costs accounted for about the same proportion of spending as other festival sizes (typically between 11-15%). Production costs accounted for the largest proportion of spending across all festivals for this group (between 54-62%), although this is comparable to the proportion of spending on production for the smallest festivals. Marketing accounted for a relatively small share of overall spending, at between 2-4%. Larger festivals with an annual expenditure of between £501k-£999k and £1m+ show a spending profile similar to that of smaller festivals.

Organisational History

The origins and evolution of arts and cultural festivals is as varied as the size, duration and content of the events themselves. Historically, Festivals were arranged to mark seasons, religious occasions or specific dates.

Now they are more usually associated with a particular theme, interest or subject or focussed within a community.

Festivals are instigated when people wish to bring others together to unite via a common passion or celebrate an occasion. Festivals can aim to inform and education their audiences, but a sense of enjoyment is essential.

Festivals can be commercial events, designed to entertain and also to make a profit either for the organisers or as a philanthropic event, for charity or a specific fundraising goal. They can be set up as a development mechanism, often within a community to bring cohesion and celebrate common links to a place or group of people.
More recently Festivals have been identified as important in attracting visitors to a particular place / event and have been increasingly used to promote tourism to an area.

Canterbury Festival: *'Kent's International Arts Festival'*

Canterbury Festival grew out of the tradition of the Cathedral Play in the 1920's and was first called a festival in 1929 by the Dean of Canterbury Cathedral working closely with the *Friends of Canterbury Cathedral*. The plays, commissioned from the most popular writers of the time, were a central feature of the Festival for 20 years.

The present format dates back to 1984. Coinciding with the opening of the rebuilt Marlowe Theatre, the three week Festival was revived with wide ranging performances linked by an annual theme.

Canterbury Festival has always recognised the need for high quality programming as well as finding new ways to broaden its appeal. The Festival's turnover has increased by 90% over the past six years.

Festival Director Rosie Turner said that audited sales and audience figures are not available from the early days of the Festival – there are no surviving profit and loss accounts. Income from the Festival and associated activities was £450,000 in 2004 and increased to £800,000 in 2008. These figures include support from organisations such as the Arts Council and Kent County Council which can change each year. In 2008, 80,000 people attended a ticketed or free event organised by Canterbury Festival.

Brighton Festival: *'the largest multi arts Festival in England'*

The annual three week Brighton Festival was founded by Sir Ian Hunter in 1967. Hunter, who had been Director of Edinburgh Festival, also founded Bath, City of London, Malvern and Windsor Festivals and was Festival Director at Brighton for 15 years.

The festival is now the largest arts festival in England and contributes £20m to the local economy. The Festival is produced by Brighton Dome and Festival Ltd., a charitable trust who also manage Brighton Dome complex.

Brighton Festival is a leading commissioning and producing Festival with growth in earned income of 146% from 2001 to 2006.
In 2009, total ticketed attendance was 77% at 165 events with over 50% of performances sold out (over 70% sold out in 2007 so ticket sales did reflect economic conditions in 2009); in addition over 150,000 people enjoyed 11 free events.
It is estimated over half a million people attend a Brighton Festival event (either ticketed or free) each year; this has doubled since 2001.

Sponsorship and corporate support in 2009 increased to £700k or 30% of the Festival's total cost, with cash donations up 7% on 2008, reflecting Brighton Festival's importance as a key annual event. 70% of companies renewed their support from previous years and these businesses have increased their overall contributions by 34%.

Brighton Dome & Festival Corporate Strategy 2009 – 2012 sets out the organisation's long term strategic aims and it's priorities for 2009 - 2012

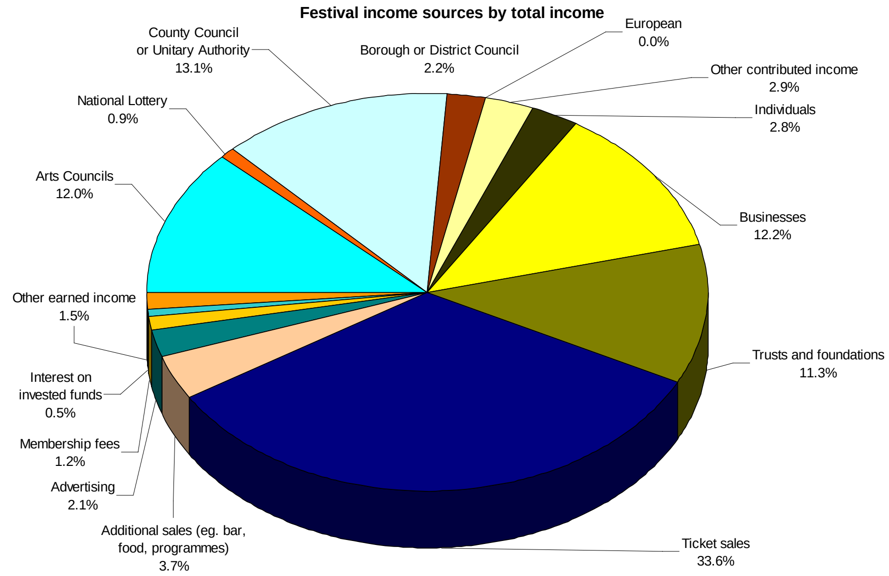
Festival Dynamics: Income and Expenditure

The Festivals Means Business 3 report (Spring 2008) also identified the different income streams for festivals.

The chart opposite shows ticket sales form the majority of festival income at just over a third of total income (33.6%).

Local authorities and councils (county, district, city and borough) together provided just over 15% of funds, with Arts Councils (England, Scotland and Wales) supplying a further 12% of total income (including Grants for the Arts). Trusts and Foundations, and private businesses contribute a larger proportion of income, at around 24%. Funds from the National Lottery (excluding Grants for the Arts) form relatively little of overall festival income at 1%, as does the revenue collected from advertising (2.1%) and additional sales (3.7%).

Other sources of contributed income included income from education and community participants, CD and art sales, gift aid, bucket donations, co-production and broadcasting income and hire of festival equipment.



Economic Impact of Festivals – South East Dimension

Very few festivals have undertaken measurement of the economic impact of their activity, but anecdotal evidence from festival organisers suggests that festivals are important in stimulating the local accommodation and hospitality sectors, for the limited period of the run of the festival.

Whitstable Oyster Festival comments that "*the Festival has an enormous impact to the local economy. Car Parks are full; restaurants are full; many out-of-towners visit for the Festival weekends!*"

Bestival, on the Isle of Wight, record that over 30,000 festival attenders came on to the island via the IOW ferry

The 2008 Folkestone Triennial has reports of an upturn in takings by local hotels and catering businesses. The event attracted 51,000 visitors over its three month period and from the Triennial's visitor survey 25% of these were staying visitors. The event also attracted substantial national press and media coverage, supporting the ambitions of Folkestone to be perceived as a creative place.

In the example of Brighton Dome & Festival, the substantial synergy between the venue and the festival supports their mutual sustainability. There is an issue as to whether festivals can be more sustainable by such collaborative approaches.

Where studies on the economic impact of festivals have been undertaken, examples of the economic dimensions of festivals include:

- In 2004, Brighton Festival generated £20 million into the local economy.

"*Recent discussions with Brighton and Hove Chamber of Commerce and the Brighton Economic Partnership indicate that the business community view Brighton Festival as welcome news in a gloomy time. The Festival offers them a sense of opportunity. Businesses also anticipate that the new artistic direction of the Festival with the involvement of Anish Kapoor and the siting of his sculptures around the city will draw in new audiences who will visit restaurants and shops and that here is an opportunity to attract new business*".[13]

- Pride's contribution is valued at, £7.5 million.[14] During Pride the city's accommodation provision is full and visitors are now booking a year ahead. Restaurants and pubs report substantial increase in business during the event and Pride has developed strong relationships with local businesses that are now capitalising on the opportunity provided through Pride.

- Winchester Hat Fair draws an audience of 30,000 of which 81% are visitors to the City. Their economic contribution is estimated to be over £1 million.

[13] Andrew Comben Chief Executive Brighton Dome and Festival
[14] Do It With Pride in Brighton & Hove. University of Brighton - 2005. Browne, Church & Smallbone

The next chapter examines the economic dimensions of the South East's festival offer. Primary evidence supplied by the festival sector has been modelled against the most recent economic forecasting and profiling information available for the region.

The economy of the South East is worth over £177bn and makes up around 50% of the total net contribution to Government finances. The positioning to the South East as one of the leading regional economies in the UK helps support a broad range of industries and sectors that drive innovation, create employment and attract inward investment at a national and international level.

The South East economy is also supported by a diverse and rich mix of festivals, which form a key component of the regional cultural offer. For SEEDA to implement successful festival clusters at key strategic locations in the South East and help secure wider sustainability of the regional festival offer, it must prescribe targeted measures of support based on an understanding of the economic impact of the region's festivals. In order to create a robust overview of the sector modelling has been considered across three areas:

- GVA Assessment[15]
- Investment
- Employment Generation

[15] Defined in its broadest sense, Gross Value Added (GVA) is a measure of the total value of goods and services made available through economic activity.

GVA Assessment

Tourism and the visitor economy is valued at £10bn in the South East, and equivalent to 7% GVA at the regional level l[16].

The Office for National Statistics defines GVA as a measure of the contribution to the economy of each individual producer, industry or sector in the United Kingdom. GVA is an important component used in the calculation of whole economy Gross Domestic Product (GDP) and enables a more localised assessment of economic outputs and productivity to be determined.

The Office of National Statistics has adopted the European classification of area known as the Nomenclature of Units for Territorial Statistics (NUTS). Owing to the baseline methods employed to derive GVA and productivity data in the UK, the NUTS system only defines areas down to county level where the confidence and reliability of statistical data remains sufficiently high.

In light of these restrictions, this study seeks to contextualise GVA using data returned through research undertaken with festival organisers, to identify key nuances in the economic impact of the South East's regional festival offer using a basket of three theme areas:

[16] Tourism South East, March 2008

i. Festival expenditure

ii. Gross festival output as a measure of turnover

iii. Sector proxy GVA

To support a detailed assessment of key themes emerging from the survey, festivals are considered against designated size groupings according to recorded visitor numbers.

- Small Festivals < 5k attendances
- Medium Festivals > 5k < 20k attendances
- Large Festivals > 20k attendances

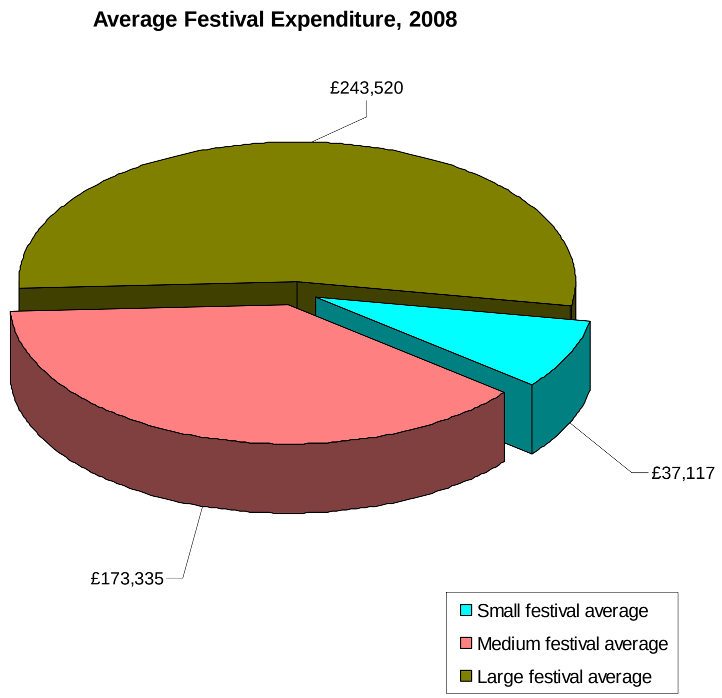
Festival Expenditure

Festival organisers were asked to indicate the level of expenditure incurred during the organisation and delivery of their respective festival, based on 2008 costs. Average levels of recorded expenditure for small, medium and large festivals in the South East are shown below.

The levels of expenditure reported by organisers of different sized festivals varied significantly and reflected the varying costs expected from hosting events of greatly different visitor sizes.

The survey results[17] show that the highest average expenditure was reported by large sized festivals, at over £230,000. Medium sized festivals typically incurred expenditure that averaged around £173,000 in 2008, whilst small festivals spent an average of just over £37,000. Assuming the selection of festivals of different sizes included in the survey is representative of the wider profile across the region, the expenditure of the 335 collective festivals identified in this study contributes in the order of £39.7m to the South East economy.

Identifying how such expenditure is met, through direct and indirect income, will help to determine the overall financial sustainability of each respective festival, particularly during the current recession and is considered further in this report.



[17] A total of 92 returns were received from festivals, this was added to 30 data sets that sam already possessed and 12 publicly available reports.

Indicative Total Festival Economic Contributions

The festivals survey identified estimated levels of visitor spend generated by festivals of different sizes that benefit respective local economies. Using this assessment together with calculations of direct spend, an indicative total economic contribution through primary, secondary and tertiary spend has been determined for festivals of different sizes, as summarised below.

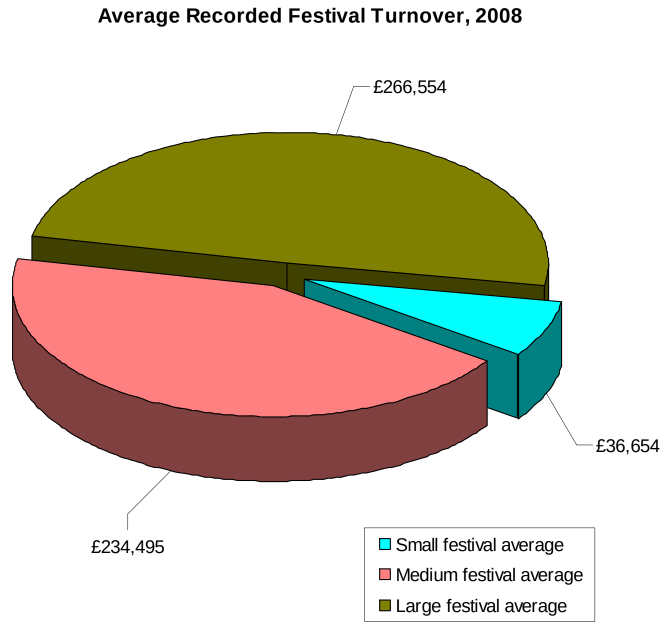
Festival Type	Indicative total economic contribution (to nearest £million)
Small festivals	£47m
Medium festivals	£130m
Large festivals	£326m
All festivals	**£503m**

The indicative assessment of economic contribution of festivals does show that within the South East, festivals contribute 5% of the total £10bn generated in the region through the tourism and visitor economy.

It is important to note that robust economic appraisals of festivals of different sizes within the South East region are limited, and as such the economic assessment included here relies on a number of broad assumptions including levels of visitor expenditure that are assumed to be the same for festivals of equal sizes in different part of the South East region. Outside of the scope of this study it is to be expected that there are a host of localised variances affecting the level of each festival's respective economic contribution, connected to the local profile of visitors, specific activities supported by a festival and the location, timing and positioning of each festival.

Gross Festival Output

The gross output for each respective festival has broadly been measured as the turnover achieved during 2008, primarily through sales and other income derived from specific public and private investment and financial support. Average recorded turnover in 2008 for festivals of different sizes is shown in the chart below.



As anticipated, the highest average turnover relates to large festivals, equivalent to over £266,000 turnover in 2008.

The average £234,000 turnover reported by medium sized festivals for the same year was around £32,000 less than that of large festivals. However, the corresponding difference in expenditure levels, as described above, is nearer to £60,000. This result can be explained in part due to a number of medium sized festivals achieving high turnovers relative to recorded expenditure in 2008, including the Multiplay Festival, which achieved around £1m turnover and expenditure of under £500,000, and Garsington Opera, which achieved turnover of £100,000 above expenditure – a level not realised by most festivals of any size.

The survey identified a number of small festivals which reported higher expenditure values than turnover achieved in 2008. This has led to the small festival cohort being the only size classification where average turnover was below expenditure, and the possible implications of this are considered further in this economic assessment.

Sector Calculated GVA

Defined in its broadest sense, Gross Value Added (GVA) is a measure of the total value of goods and services made available through economic activity.

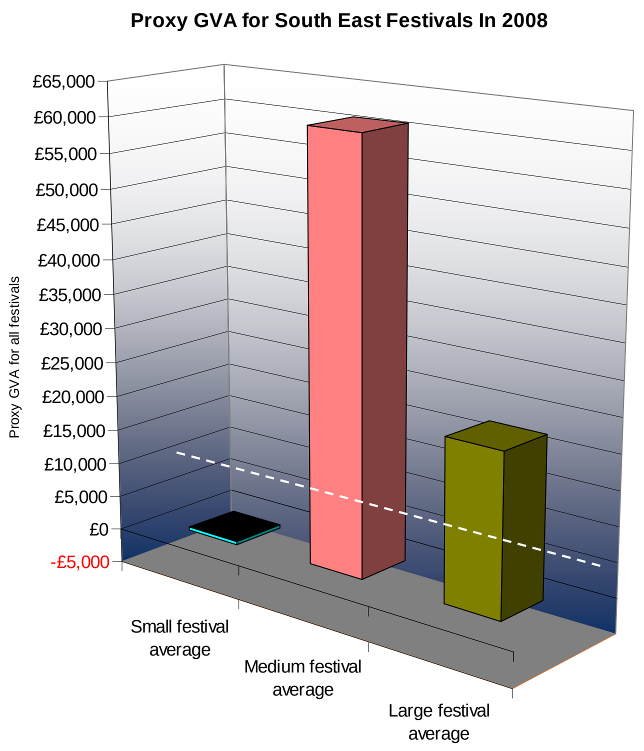
A calculated assessment of added value is required owing to the baseline methods employed to derive GVA and productivity data in the UK, the preferred system employed by the Office of National Statistics only defines areas down to county level where the confidence and reliability of statistical data is still sufficiently high, as described above.

Proxy figures derived within the scope of this study rely on calculations relating to expenditure and gross outputs accrued by the festivals directly and assume that GVA = Output = Income = Expenditure, where expenditure incorporates all aggregate expenditure to enable a simplified assessment using an output based approach of value added to remain true.

Based on data available within the scope of this study, a calculated GVA value in 2008 for direct festival economic activity and averaged across festivals of all sizes in the South East is equivalent to £21,532. Assessed against the three defined festival size groups, GVA is highest among medium sized festivals at £61,160 and lowest among small festivals, where GVA is estimated to be negative.

Such variation in proxy GVA values between festivals of different sizes across the South East is likely to be indicative of the focused nature of the data collated for this study, but could provide an indication of the possible economic vulnerability of smaller festivals in the region, where a significant majority of organisers have reported that expenditure exceeds turnover, in some instances by up to 200%.

The calculated GVA value of £23,035 for large festivals was slightly above the overall regional average, this reflects the higher relative expenditure typically incurred by festival of this size. GVA value for small festivals was negative, owing to higher expenditure above output.



Investment

There exists a wide range of different sources of financial investment and support that festival organisers in the South East can approach, each of which can generally be designated against one of the following categories:

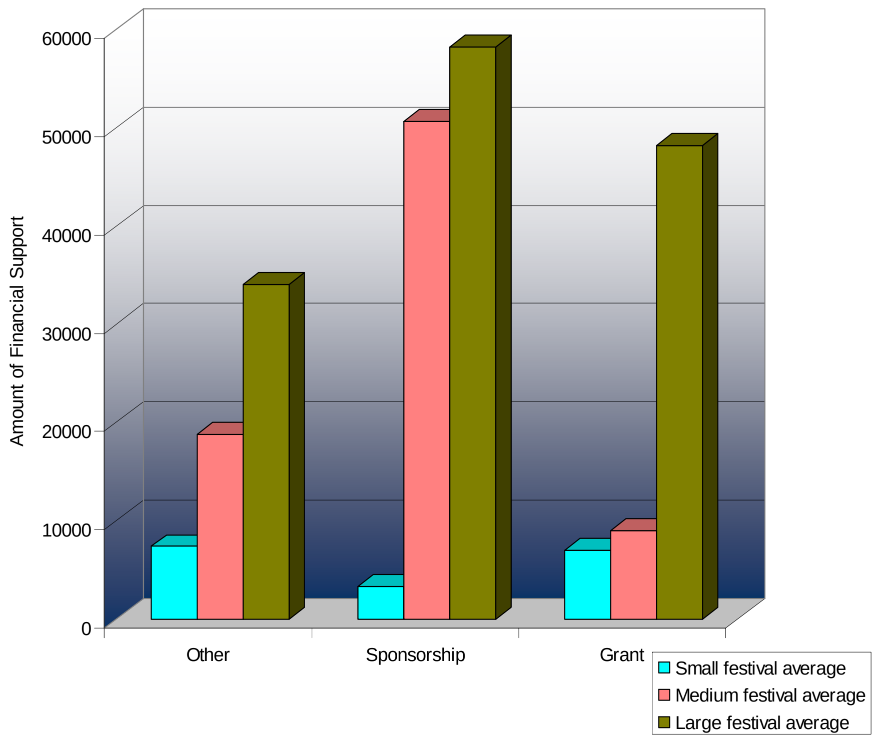
i. Grant funding
ii. Business/private sponsorship
iii. Other, including in-kind support

To identify patterns in the level and type of financial support awarded to festivals in the South East, organisers engaged in the survey were asked to provide details of recently secured investments, the results of which are summarised in the chart opposite.

Extrapolating the results of the survey reveals that the average level of financial support secured by a festival in the South East is £59,416, which is equivalent to just under £20m total financial support awarded to the region's 335 festivals identified in this study.

As might be expected, the survey results show that large festivals secure the highest levels of investment across all types of identified financial support, with an overall investment average of just under £47,000 per festival per annum. Large festivals have particular dominance in securing grant funding from a variety of sources including central Government, Lottery funds and regional and local cultural grants. A large festival secures on average almost six times the grant support achieved by a medium sized festival, as the second largest grant funded cohort.

Average Level of Financial Support Secured by Festivals



This gap narrows considerably though when considering levels of financial support realised via business and private sponsorship. On average, a medium sized festival can attract over £50,000 corporate sponsorship, whilst a large festival typically achieves in the order of £58,000.

Small festivals secure significantly less investment from each of the three headline funding types, when compared to both medium and large festival averages. Survey results show that small festivals in the South East are likely to attract roughly equal levels of grant funding and 'other' types of financial investment, valued at around £7,000 respectively, with some additional sponsorship valued at a little over £3,000.

Distribution of Investment

Collating the sum total of investment averages across festivals of all sizes, reveals the investment hierarchy as summarised below.

In 2008, for every £100 of investment in festivals in the South East:

- 48% is from business and/or private sponsorship
- 27% is from grant funding
- 25% is from other funding sources

These results highlight the significance of corporate sponsorship as a main funding source for the region's festivals, accounting for almost twice the levels of grant and other investment secured by festival organisers responding to the survey. The high representation of corporate sponsorship among the region's festival investment portfolio is particularly pertinent to wider considerations of the impact of the economic downturn, particularly at a time when many corporate sponsors are revisiting existing funding arrangements following exceptionally tough economic conditions from the second half of 2008. The implications of the downturn on financial support for the South East festival offer are considered further in this report.

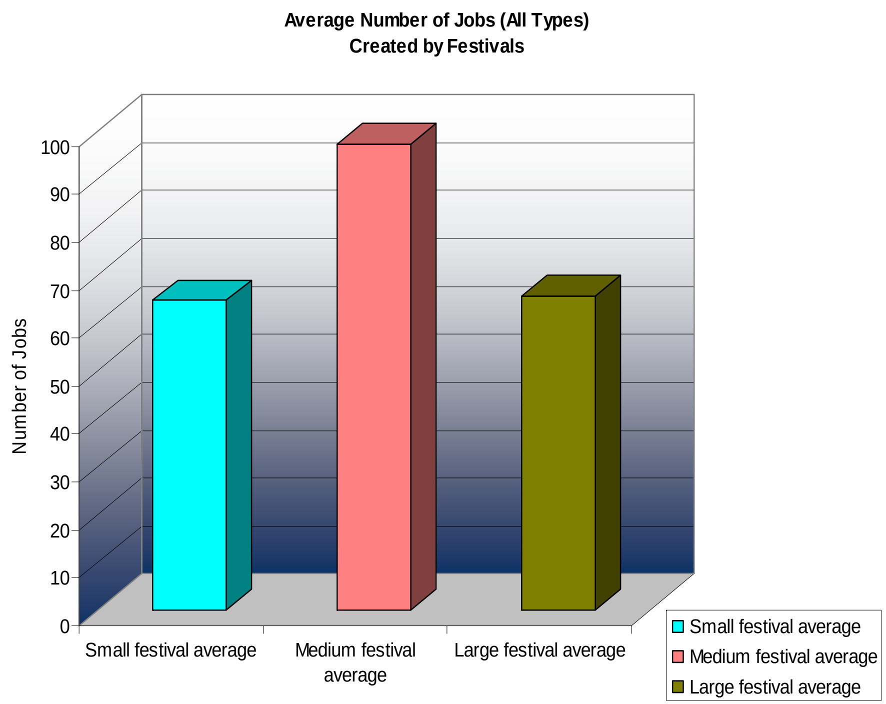
Employment Generation

Festivals have the potential to make a significant contribution to the economy through job creation and employment opportunities generated during the design, planning, management and delivery of a festival.

For the purposes of this study, the types of jobs created by festivals in the South East are considered across three broad classifications of employment, including:

- Permanent positions
- Temporary positions
- Voluntary positions

Organisers were asked to indicate the total number of positions of employment created by their respective festival and details of calculated averages for each of the three festival size cohorts in shown in the chart below.



The relatively high job creation average of medium size festivals could indicate a propensity towards more labour intensive forms of delivery requiring more direct employment than larger festivals, where key delivery functions can be outsourced readily, hence avoiding the need for direct employment of personnel.

It is to be expected that the discrete resources typical of many small festivals can act to restrict access to outsourced services, resulting in a need for management and delivery services to be performed by key personnel employed by the festival.

Measured across all festivals, average job creation was equal to 75 positions per festival as a mixture of permanent, temporary and voluntary posts (see further details below), which provides an indicative figure of employment generated by all 335 regional festivals in the order of 25,000 positions.

Overall, the highest level of job creation was associated with medium sized festivals, supporting an average of 97 positions. Large festivals created an average of 66 positions, just 3 above the small festival average.

Types of Employment

Extrapolating the results returned through the survey to include the South East region as whole, results in the employment pattern summarised below.

For every 100 jobs supported directly by festivals in the South East:

- 65% are voluntary positions
- 28% are temporary positions
- 7% are permanent positions

Voluntary Positions

The largest type of employment supported by festivals of all sizes was voluntary work, accounting for 65% of all direct festival employment, with positions typically lasting for a time limited period scheduled before, during and after the festival run-time.

A majority of organisers responding to the survey indicated that volunteers constituted a particularly valuable resource, often perceived to be essential to the overall success and long term sustainability of respective festival. Volunteering also supports a sense of community ownership, commitment and local pride.

The prevalence of voluntary work over alternative forms of employment is likely to be linked to a number of distinct advantages which festival organisers can capitalise on, including:

- Low recruitment and management costs
- No direct employer costs
- Use of easy-in easy-out contracts that are time limited over days/weeks only
- Can attract target groups to be volunteers e.g. young people, older people, disabled etc.

Whilst minimised direct costs are likely to be attractive to all festival organisers, the results also indicate that voluntary positions account for proportionately higher levels of overall employment among the large festival cohort (75% of all employment), compared with 59% of all direct employment generated by medium sized festivals and 57% of direct employment with small festivals. Most festival organisers identify a clear merit to adhering to rigorous cost minimisation practices that are treated as a cross cutting priority for all areas of festival delivery, particularly championed amongst large festival organisers through the use of significant levels of voluntary labour.

Temporary Positions

Temporary paid employment was the second most prevalent employment type after voluntary work, accounting for 28% of the total jobs generated directly by all festivals engaged in the survey.

Amongst the medium size festivals, temporary positions accounted for 38% of direct employment per festival on average. Among small and large festivals the proportion of temporary employment was lower, at 29% and 17% respectively. The relatively low level of temporary employment supported by large festivals is indicative of a general trend of low overall levels of paid employment among festivals of this type, as discussed further below.

Permanent Positions

Permanent employment accounted for 7% of jobs supported directly by festivals of all sizes responding to the survey. Proportionately low levels of permanent jobs was a cross cutting theme affecting all three defined festival cohorts. However, the results also showed that on average, small festivals had around 13% of all employment as permanent posts, almost double the 7% recorded for large festivals and considerably more than the 3% level among the medium festival cohort.

The relatively high levels of permanent jobs supported directly by small festivals in the South East, could suggest that small festivals are more likely to require a fixed number of staff to perform specialist and skilled roles to ensure the success of a festival, without recourse to additional support and outsourcing opportunities which may be open to more resource-rich larger festivals.

Low permanent posts among medium size festivals suggest a different delivery structure with fewer permanent positions balanced with higher levels of paid temporary posts and significant numbers of volunteers engaged at crucial points in the festival timetable. This approach is also continued across larger festivals. Results from the survey indicate a greater bias in direct job creation toward voluntary positions with fewer temporary posts and modest levels of permanent roles, suggesting a propensity among large festivals to outsource key delivery tasks to avoid extensive rolls of paid employees, which is a key cost factor.

Local Authority Support

Public sector support through the local authority is a further resource on which many festivals are reliant with local authority officers providing a key role in festival development and delivery. Examples of such resource provision include Kent County Council, Oxford Inspires, West Sussex County Council and Brighton & Hove City Council.

Wages

The survey captured details of average wages paid by festival organisers against salaried posts, calculated as a full time equivalent.

- £24,704 pa as a large festival average
- £24,868 pa as a medium festival average
- £18,967 pa as a small festival average

Estimated remuneration for full time equivalent posts at large and medium size festivals are essentially the same. Wages for salaried posts at small festivals are lower on average by around £6,000, a consequence of the restricted resources at the disposal of smaller festivals.

Average wage levels can provide a basic assessment of economic impact of sectors within a defined region. However, the mixed nature of employment supported by a typical festival prevents a direct assessment of the actual economic impact of all paid employment both permanent and temporary, without further detailed research. An initial investigation into the value of average permanent salaried posts per festival shows a wage contribution in the order of £30m per annum by festivals across the South East.

Free Festivals

Free festivals form a major part of the complete festival offer in the South East. In 2008, free festivals accounted for around 37% of the total visitor attendance levels across the region. The continued continuation of free festivals will be vital to help ensure that the diversity of the South East's festival offer is sustained into the future.

The scoping of the economic impact of free festivals has been considered across three areas:

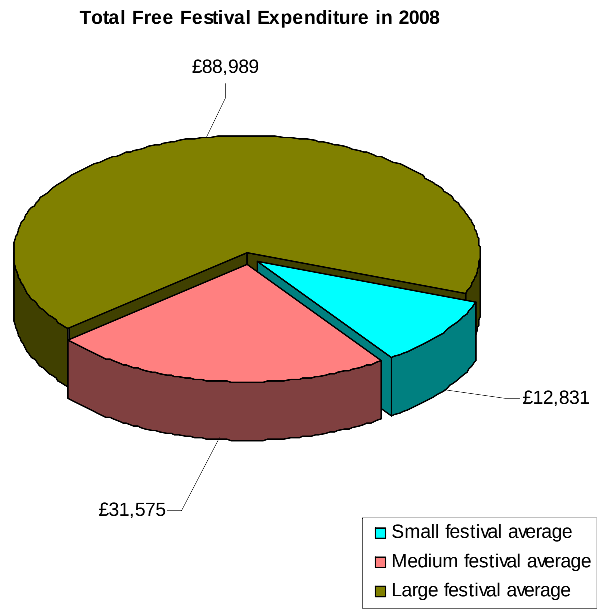
- Expenditure
- Investment
- Employment Generation

Expenditure

Organisers of free festivals were asked to indicate the level of expenditure incurred during associated organisation and delivery activities, based on 2008 costs. Average levels of recorded expenditure for small, medium and large free festivals, as measured by visitor attendance levels, are shown opposite.

As expected, levels of expenditure recorded by free festivals of all sizes are considerably below equivalent all festival averages. Levels of expenditure for small and large free festivals are around 38% the value of total festival expenditure for each size cohort. However, the expenditure of medium size free festivals is only 18% of the all festival average for this cohort.

This can be explained in part through the presence of a small number of medium sized ticketed festivals with high recorded expenditure, which significantly increase the overall expenditure average for this cohort.



Results secured through the survey with festival organisers can be used to calculate the representation of free festivals as a ratio of the total festival offer – calculated as roughly 1 in every 4 events. These results can be manipulated to reveal that an indicative total annual expenditure among free festivals in the South East is equal to £3.7m. Given the nature of the festivals as free events, it is reasonable to presume that most of this expenditure will be focused on respective local economies in the region.

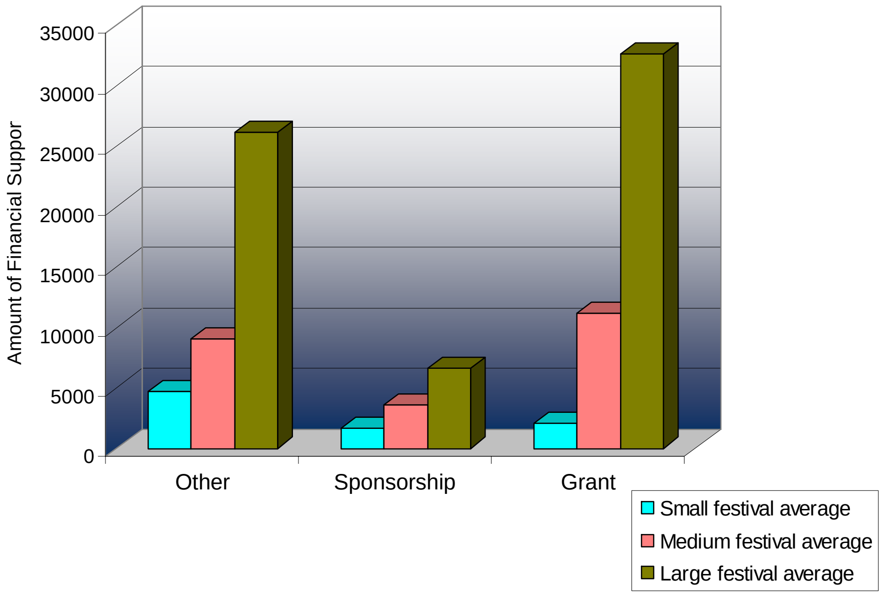
Investment

The assessment of financial support secured by free festivals is considered over the same pre-defined categories:

i. Grant funding
ii. Business/private sponsorship
iii. Other, including in-kind support

Organisers of free festivals engaged in the survey were asked to provide details of recently secured financial support, the results of which are summarised in the chart below.

Average Level of Financial Support Secured by Free Festivals



The average investment per free festival was equal to £32,546. Using the same frequency ratio of representation of free festivals in the South East, as described above, the results can be extrapolated to identify that free festivals across the region attracted around £2.7m of financial support in 2008.

Patterns in financial support secured by free festivals show that large free festivals attract the highest levels of funding across all identified categories, with an average total investment value of £21,797 per large free festival per annum. The average levels of financial support secured by medium and small free festival cohorts is considerably lower, equivalent to around £7,900 and £2,800 respectively.

This trend emphasises the relative dominance of large free festivals in attracting and securing investment from a range of sources and highlights a possible need for additional support targeting medium and small free festivals to increase the level of funding secured in future, which is likely to be particularly relevant during the current economic downturn.

Distribution of Investment

Collating the sum total of investment averages across free festivals of all sizes, reveals the investment hierarchy as summarised below.

For every £100 of investment in free festivals in the South East:

- 47% is from grant funding
- 41% is from other funding sources
- 12% is from business and/or private sponsorship

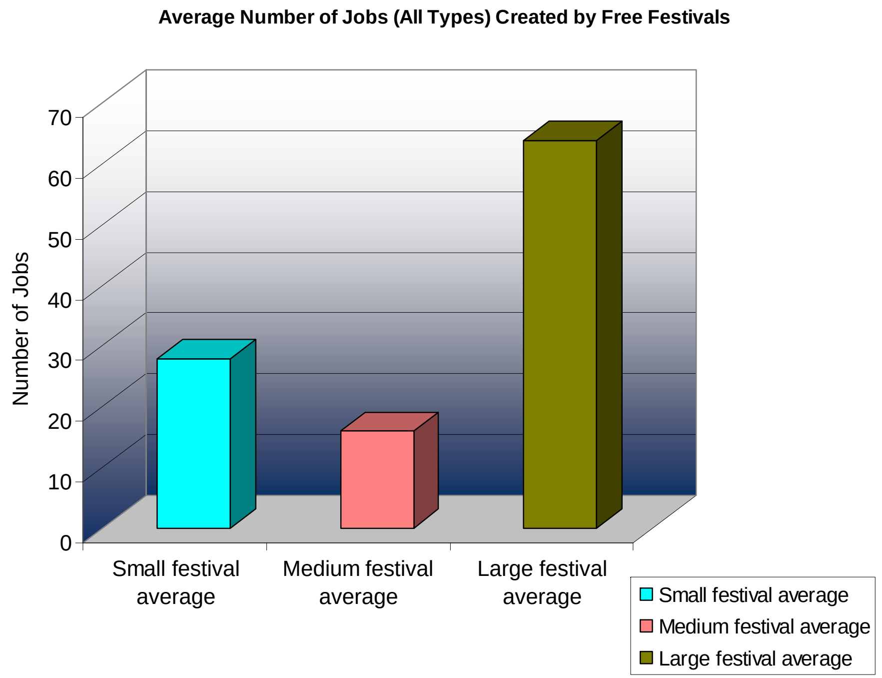
The results show that free festivals of all size cohorts attract relatively little corporate sponsorship, especially when compared to averages across all festivals where medium and large size festivals exceeded £50,000. The low value of corporate sponsorship secured by free festivals is likely to indicate an historic trend and potential lack of engagement between corporate sponsors and free festival organisers.

This may highlight a need for future marketing and promotion activity to include specific targets to increase sponsorship and corporate backing of free festivals, to help diversify the funding base that these festivals draw upon, and raise the profile of corporate sponsors beyond traditional large ticketed events in the region.

Employment Generation

As with ticketed festivals, free festivals also have the potential to make a significant contribution to the economy through job creation and employment opportunities generated during the design, planning, management and delivery stages.

To maintain a reasonable confidence level in the data secured, employment generation among free festivals in the South East has been considered across all job types. Organisers were asked to indicate the total number of positions of employment created by their respective free festival, as shown in the chart below.



Measured across all free festivals, average job creation for all types of employment was equal to 36 jobs per festival. This provides an indicative figure of employment generated by all free festivals across the South East in the order of 3,000 posts, equivalent to 12% of the total 25,000 posts supported by all festivals identified in this study.

Distribution of employment generated among different size cohorts of free festivals varies considerably from the patterns identified for all festivals, where medium size festivals were the largest source of average employment. Highest average employment levels are supported by large free festivals, at just over 60 posts per festival. This is likely to be a consequence of the higher overall resource levels available to larger free festivals to support more direct employment than comparable medium and small cohorts.

It is interesting to note that medium size free festivals account for the lowest employment average, at around 16 jobs per festival. There is some anecdotal evidence that this may be linked to a number of organisers in this cohort choosing to recruit specialist personnel to facilitate delivery, as a preference over managing larger amounts of less skilled labour.

Small free festivals support an average of 28 jobs over the delivery of a typical festival, and this is likely to include a large percentage of voluntary posts to minimise direct costs whilst still achieving the required level of resources to ensure the festival offer is successful.

Wages

The average wage for all salaried posts, calculated at full time equivalents was equal to £27,600, which is around £3,000 higher than the highest average wage for salaried posts supported by all festivals, as detailed earlier in the report.

As identified earlier in the report, the mixed nature of employment supported by a typical free festival prevents a direct assessment of the actual economic impact of all paid employment. However, an initial investigation into the value of average permanent salaried posts per free festival shows a total wage contribution in the order of £1.2m per annum This equates to around 4% of the £30m total wage contribution identified for all festivals across the South East.

4. Impact of the Recession

Effect of the recession on the cultural sector - Overview

There is increasing anxiety that the most significant impact of the recession on the cultural sector will be a decline in the level of investment and sponsorship from commercial companies.

Corporate Donors

Recent research undertaken by Arts & Business indicates that 30% of corporate donors who gave more than £1m to the arts last year are expecting these budgets to shrink in the current economic recession. Arts & Business foresee that there will be a substantial drop in corporate sponsorship in 2010 and 2011.

Many organisations secured their sponsorship deals in the latter part of 2008 before the full effects of the economic downturn were understood. Some corporate sponsors are managing to maintain their support, such as Accenture's funding for the National Theatre or Coutts Bank for the Donmar and Almeida Theatres in London. However other arts organisations such as Aldeburgh Festival are reporting a significant reduction in corporate sponsorship. Bath Festivals are also reporting that their corporate sponsorship has been “dramatically hit” and they are anticipating a difficult year. London's multi-cultural festival, Rise, has had to be scrapped due to a failure to find a sponsor. There are examples of arts organisations in London which were reliant on sponsors and considerable sums of money from individual large scale City businesses - either in the property or financial sectors. These festivals are now severely at risk due to the loss of these important revenue sources.

Trusts and Foundations

These very important sources of funding for cultural organisations are experiencing significant reduction in the value of funds available for distribution to good causes, due to the sizeable and recent reduction in the value of their investment portfolios.

For example, The Paul Hamlyn Foundation, a significant donor for many arts organisations, has suffered a reduction in available funds of 10% in the past 12 months. The direct effect of this is being felt by numerous projects and organisations including West Yorkshire Playhouse that has seen a notable reduction in support.

Individual Donors

Organisations are reporting that whilst many individuals are trying to maintain their support, the level of their donations is decreasing in line with reduction in the income they receive from their investments.

Public Sector Funding

Alan Davey, Chief Executive, Arts Council England voiced his concern that if government funding were to be significantly reduced in this recession then organisations would “enter a spiral of decline….a perfect storm where all sources of income are endangered". He went on to emphasise that many smaller organisations would cease to trade and there would be less propensity towards artistic risk and innovation, with the result that audiences would decline.

Arts Council England is currently conducting research - The Impact of the Economic Downturn based on a sample of its regularly funded organisations (RFOs). It is evident that it is too early for a clear understanding of the impact of the recession to be made. At this stage it would not be unreasonable to suggest that there is a direct correlation between wider economic circumstances and the festival sector.

Funding for the arts is set until 2011 and there is concern that the next funding review will see serious cuts.

Earned Income and Ticket Sales

Many organisations are reporting that box office income is not yet affected.

- At the end of 2008, The Society of London Theatres showed an overall increase of 1% across the businesses of its member theatres. Major musicals like Oliver are announcing record sales.
- The UK Film Council reports that box office takings are up by £40m from 2007

The UK's major festivals are also experiencing the effects of the downturn. Glastonbury is reporting that they will not take any risk with this years' programme and will present tried and tested acts in order to maintain a viable level of income with tickets at £175 for the three day event. The result of this is that 2009 tickets are now sold out, while in 2008 with an arguably higher risk headline act (Jay Z) tickets were much slower to sell, with still some availability on the first day.

The Impact of the Current Recession

Since the second half of 2007, the UK, along with the rest of the world's leading economies, has experienced a continued reduction in levels of economic growth and output, and was officially declared to be in recession in January 2009. The range and diversity of the South East's festival offer means that the effects of a prolonged downturn are likely to be evidenced across a broad range of measures and to differing degrees.

Impacts of Long-Term Recession on Festivals

Key issues facing the festivals sector in the South East Region in the current economic downturn:

i. **Sustainability** The South East region has a very large number of festivals, over three hundred and twenty have been identified through this study (excluding food festivals, more specialist events or locally based celebrations with no programmed cultural content).
How sustainable is this level of activity - especially in the case of some smaller festivals who are now using up their reserves?

ii. **Competition** between festivals for funding, audiences and profile will increase as resources become scarcer.

iii. **Reduced financial backing** - festivals which rely on a single stream of income or one major sponsor are particularly at risk

With one exception all the festivals interviewed reported a decline in the levels of corporate sponsorship.

Most of the festivals in the region are reliant on attracting multiple sponsors from the SME sector – a sector in which many businesses are experiencing difficulties.

In the experience of Canterbury Festival -

"Estate agents, solicitors, corporate local businesses are giving smaller scale support this year – some have gone out of business. We are seeing a lack of support this year and our largest single sponsor donation is £8k"

The exception is Brighton Festival who is seeing an overall increase in sponsorship -

"Corporate sponsorship is showing a 17% increase from 2008. This includes major investment year round in the Brighton Festival and Dome by Southern Trains. There are significant increases from other major business in Brighton who are committed to supporting the Festival over a three year period. These agreements were secured last September; however we saw a decline in companies signing up to support the Festival from October onwards. SME's were either declining or cautious in promising support. Help in-kind is remaining on a par with 2008, including valuable press and media in-kind sponsorship".

Pride reports that it *"receives a substantial amount of donations from businesses and we have also, as part of organisational development, professionalised our fundraising activities. Help-in-kind, through the donation of goods and services, is also an important aspect of our business base and with the demise of many SME's we are finding that there is a reduction in this source of support But Pride is viewed as a unique offer and involvement with Pride also meets the corporate responsibility agenda of many businesses"*

New relationships under negotiation with sponsors are also problematic.... *"a property development company interested in supporting our festival have withdrawn due to the impact of the recession on their sector and issues with their bankers. Although local businesses want to continue with their support, many are now offering help-in-kind rather than cash – for example hosting a launch"*[18]

More long-established festivals such as Broadstairs Folk Festival, funded mainly from their own resources with small grants from Broadstairs Town Council and Thanet District Council, have yet to see any change in their circumstances.

A decline in support from trusts and foundations is also affecting the South East. As Trusts and foundation are in general reliant on income from their investment portfolio they are experiencing rapid decline in the

[18] Winchester Hat Fair

amount of funds available to award. Festivals often rely on these sources of support for their education, community and outreach work so it is these aspects of festival activity likely to suffer the most. Garsington Opera had been anticipating income from trusts and foundations which has not materialised resulting in a shortfall of £100k.

On a more positive note, Brighton Festival have secured £10k more than in 2008 through making new applications to trusts and foundations, although the support from these organisations was lower than the sums applied for.

There is also a reduction in the level of individual donations. Garsington Opera are expecting a reduction in the value of donations and ticket sales from private individuals when the public booking opens at the end of April.

iv. **Preparation and planning** - only a very small number of festivals are undertaking scenario planning to mitigate the financial circumstances likely to be more visible later this year.

"Brighton Festival has undertaken scenario planning for the next two years on the basis that it will not be possible to sustain the current level of corporate sponsorship in 2010. Although assurances have been given with regard to public sector support the possibility that there may be cuts need to be factored in".

Guildford International Music Festival is introducing new levels of contributions for Friends which is beginning to have a small impact.

v. **Impact on the supply chain** - changes in the economies of festivals are likely to have incidental consequences across the various components of the supply chains.

Festivals are seeing their costs rise and reporting increases in labour costs for the construction of festival arena, stage or site costs and other increases in the cost of infrastructure provision. Consequently they are reviewing all options to reduce and renegotiate outgoings.

However some festivals are seeing benefits in terms of the competitive rates being offered by suppliers for construction and installation work and are negotiating savings on fees.

Many festivals which in the past have benefited from help-in-kind from local media either through free advertising or the production of festival supplements and programmes are now feeling the impact of the difficulties faced by newspaper publishers.

"Raising a sufficient funding base for Pride will be a hard process but we are in a position to capitalise on the good will we have accrued, there are lots of "invisibles" in the Pride economy – such as donations of prizes ands help-in-kind. Brighton and Hove Council, Sussex Police and St John's Ambulance also supply services free of charge"

For example these could include:

- Reduction in employment and opportunities for artists and creative practitioners.

Canterbury Festival is slightly smaller in size this year across all art forms and has reduced the number of big classical concerts in order to reduce artist fees and spread the risk across a larger number of smaller events.

Whitstable Oyster Festival are also seeing a reduction in programme size –

"Previously chefs have done displays/presentations on the beach alongside our other events but now they are back in their restaurants and less keen to participate in such presentations - we are also cutting back on other aspects of our programme"

- Reduction in employment for production companies and technical suppliers (AV etc)

- Impact of changes in the exchange rate will impact on international aspects of festivals.

The poor exchange rate is affecting South East festivals who work with international artists. Fees for artists and companies which were negotiated in euros in 2008 are now substantially increased and are impacting on 2009 budgets.

- Reduction in employment for a range of other suppliers, for example marketing and communication companies and creative industries such as web designers

vi. **Negative impact on the South East**: as a cultural destination and on the visitor economy. Festivals are a major component for the region's cultural profile and if their programmes were to be reduced in artistic quality, this would be likely to affect the visitor economy, especially for the VFR (visiting friends and relatives) market segment.

There is evidence that festivals are already scaling back on the level of events and performances in order to continue to operate. Their ability to commission new work is also being affected – all of which points toward a potential decline in capacity for artistic innovation.

"We are seeing that festivals in general are considering altering the artistic programme or cutting back on production costs to eliminate any element of risk in order to make the organisation sustainable.
Festivals will think more about income generation and about programming events that will generate publicity. The 'dead certs' will remain" [19]

vii. **Positive impact on the South East**

Events such as *White Night* and the outdoor, free weekend events at this year's *Brighton Festival* are attracting record numbers of people, many of whom travelled into the region to see these events, thus boosting the local economy. Innovative ideas are finding enthusiastic audiences.

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[19] Guildford International Music Festival

The Future for the South East Festival Offer

To contextualise the level and types of anticipated changes occurring during the current economic downturn, the future of the regional festival offer is considered across a number of key theme areas including:

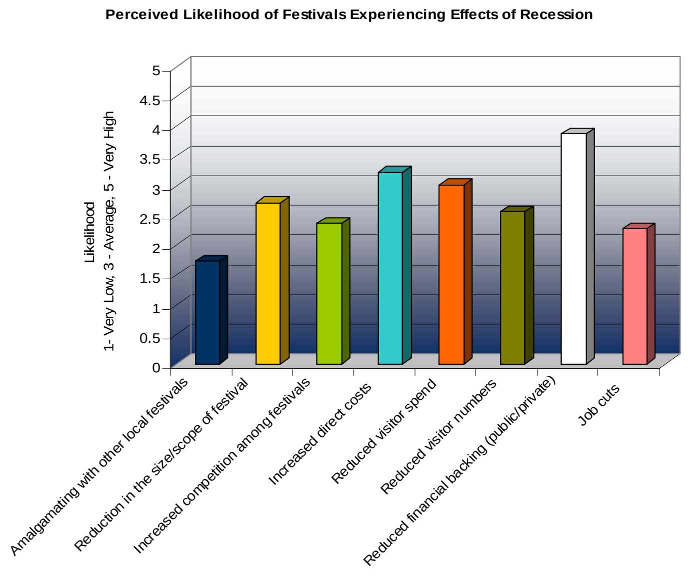
- Components of change
- Effects of the current downturn
- Projecting a future festival offer
- Targeted support and investment

Components of Change

In order to provide an assessment of the anticipated effects of the current downturn on festivals across the region, a number of key components of change have been identified, including:

- Job cuts
- Reduced financial backing (public/private)
- Reduced visitor numbers
- Reduced visitor spend
- Increased direct costs
- Increased competition among festivals
- Reduction in the size/scope of festivals
- Amalgamation between festivals
- Potential for increased penetration of the domestic market

The survey undertaken with a broad range of festival organisers sought to identify key perceptions relating to the likelihood that such drivers would affect each respective festival offer, as shown in the next chart.

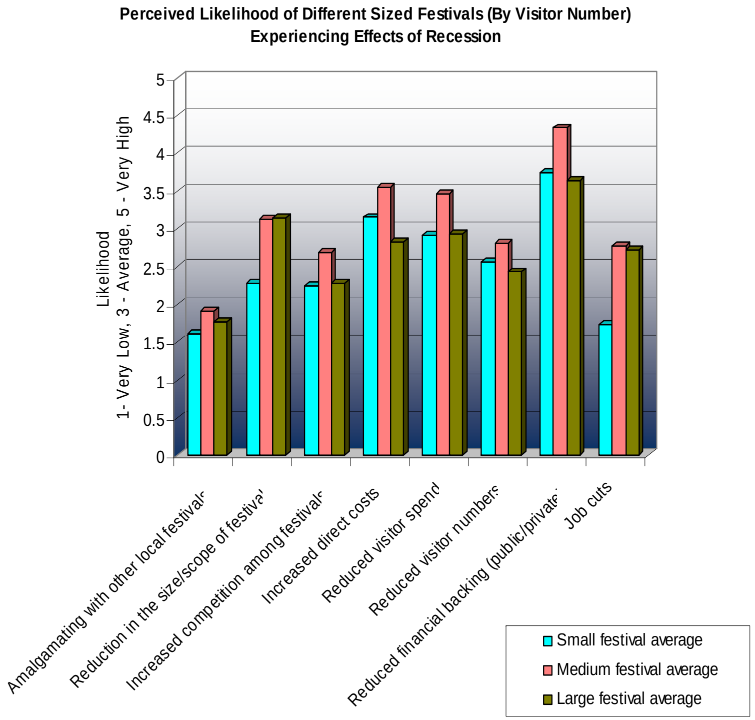


Viewed across all identified components of change, the results indicate a robust outlook presented by those festival organisers engaged in the survey, with respondents indicating that most drivers are perceived to have only a ‘low’ to ‘average’ likelihood of affecting festivals in the South East during the recession. The results suggest that most organisers anticipate a below ‘average’ likelihood that the recession will lead to reductions in visitor numbers or associated spend, reductions in the size/scope of respective festival offers, or increases in competition between different festivals. The likelihood of festivals amalgamating as a result of the recession is generally considered to be ‘low’ or ‘very low’, suggesting the diversity of the festival offer in the South East is likely to be maintained throughout the downturn.

A majority of respondents indicated a below ‘average’ likelihood of the recession leading to job cuts. This is particularly significant given the level of employment generation supported by festivals in the South East, and associated contribution to the regional economy, and suggests a perceived robustness in the employment structures of festivals that tend to use relatively high voluntary positions alongside discrete salaried posts, as discussed above.

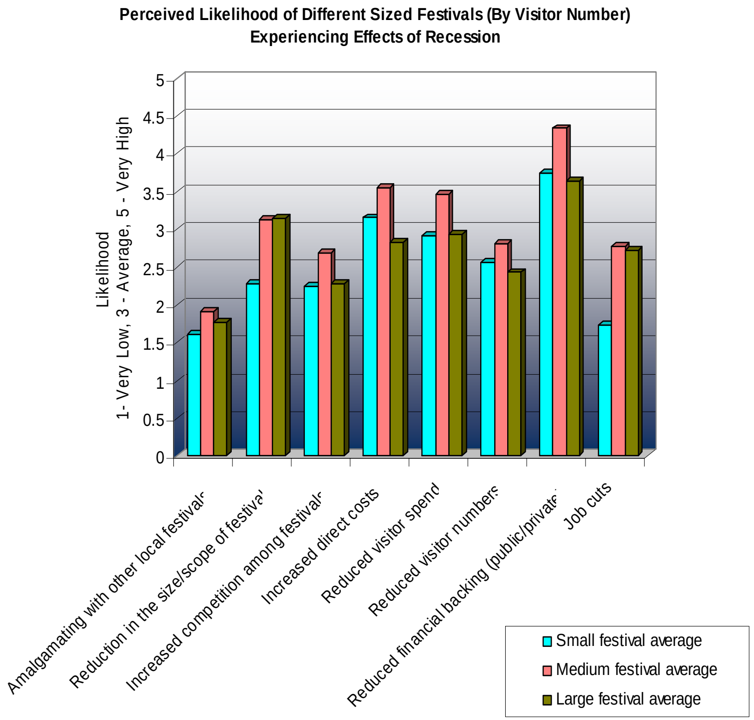
Whilst the perceived likelihood of most recession drivers affecting festivals in the South East may suggest that the wider cultural, social and economic benefits of festivals in the region may not be expected to change greatly during the recession, there are still some key components of change which organisers perceived to have above ‘average’ likelihood of affecting their respective festival. These components included: increases in direct costs and reduced financial backing (public/private) – which organisers perceived to be the factor most likely to affect their festival during the recession.

Both of these identified drivers represent externalities with the potential to significantly reduce financial income and increase outgoing and are factors that festival organisers may need to take steps against in order to preserve their existing festival offer and avoid onerous compromises in a bid to reduce overall costs. This is considered further below.



Festivals of Different Visitor Attendance Levels

The chart below shows the perceived likelihood that each identified component of change will affect festivals of different size cohorts as defined by respective visitor attendance levels.



Results secured through the survey show that organisers of small festivals generally perceive that components of change resulting from the current recession are less likely to affect their respective festival when compared with medium and large festival organisers.

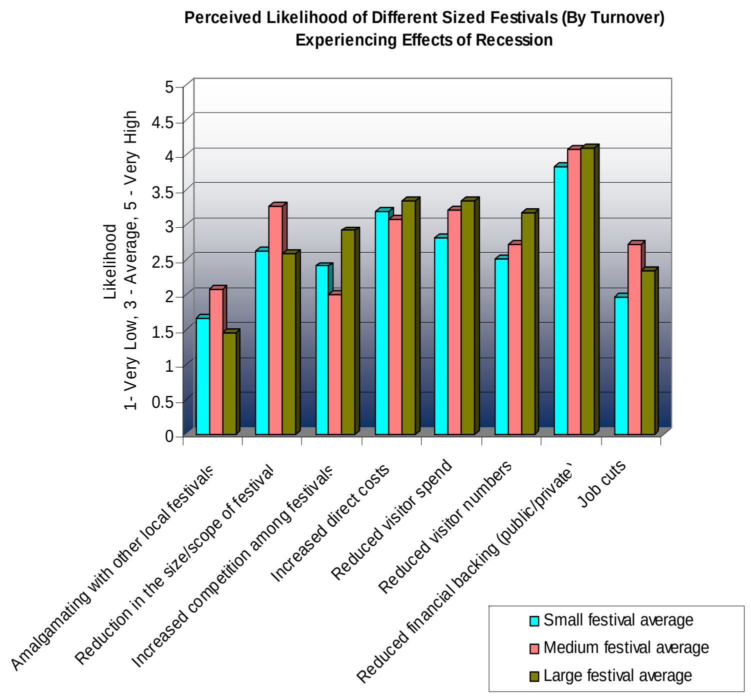
The results of the economic assessment of different festival cohorts demonstrates that small festivals have proportionately lower income, turnover and investment measures than medium and large festivals and as such are likely to have correspondingly less exposure to adverse effects presented through the current economic downturn. The perceived robustness of small festivals during the recession helps support the survey findings which show that the likelihood of job cuts, reduction in size/scope and amalgamation with other festivals, is deemed to be lowest among small festival organisers.

The results also show that organisers of festivals in the medium size cohort consider there to be a greater likelihood of their respective festival experiencing a number of the components of change connected with the recession than organisers of small and large festivals. The heightened sense of experiencing affects of the downturn by medium size festivals was particularly focused on key economic drivers, including reduced financial backing, reduced visitor spend and increased direct costs. This is examined in further detail below.

It is interesting to note that the same economic drivers are only perceived to have a 'low' to 'average' likelihood of affecting large festivals in the region, with the exception of reduced financial backing, which large festival organisers consider to have 'average' to 'high' likelihood. This may suggest that festivals attracting larger visitor numbers have a perceived critical mass that in turn limits the possible affects of the recession.

Festivals of Different Turnover Size

Survey results have been manipulated in order to support an assessment of the perceived likelihood that each identified component of change will affect festivals of different size cohorts defined by turnover, where Small = £1 - £50k; Medium = £50k - £100k; Large = £100k+.



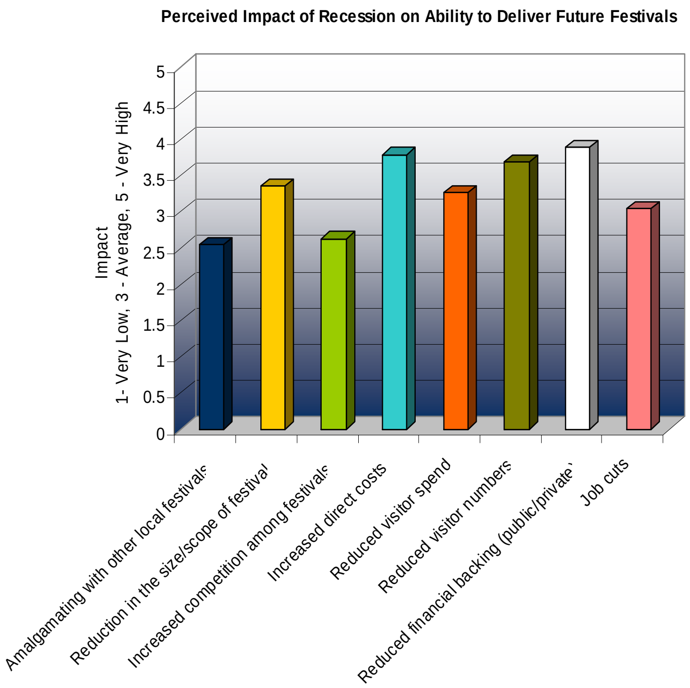
Assessment of the defined drivers against festival size cohorts by turnover reveals that reduced financial backing (public/private) still remains the component that organisers of all festival turnover sizes perceive that they will experience due to the recession.

The results show that organisers of large festivals measured by turnover perceive the likelihood of reduced financial backing resulting from the economic downturn to be 'high' to 'very high' – noticeably higher than large festivals as measured by visitor number.

The results also show that compared with small and medium festivals, organisers of festivals with large turnovers consider there to be a higher likelihood of the recession leading to reduced visitor numbers, reduced visitor spend, increased direct costs and increased competition among festivals. These suggest that those festivals with recorded turnovers above £100,000 could be more exposed to the effects of the recession, and in turn have an increased relative vulnerability to adverse changes resulting from the downturn. However, it is also likely that organisers of festivals with large turnovers are acutely aware of the possible effects and drivers associated with the current recession, and it is reasonable to expect that this has been captured in the survey results presented.

Effects of the Current Downturn

Using the same defined components of change described above, the survey also supported an assessment of the anticipated level of impact the economic downturn could have on the ability of organisers to deliver their festival offer, as shown in the chart below.



Organisers of festivals of all sizes responding to the survey indicated that a significant number of the identified components of change could result in ‘average’ to ‘high’ impact on ability to deliver future festivals, in particular:

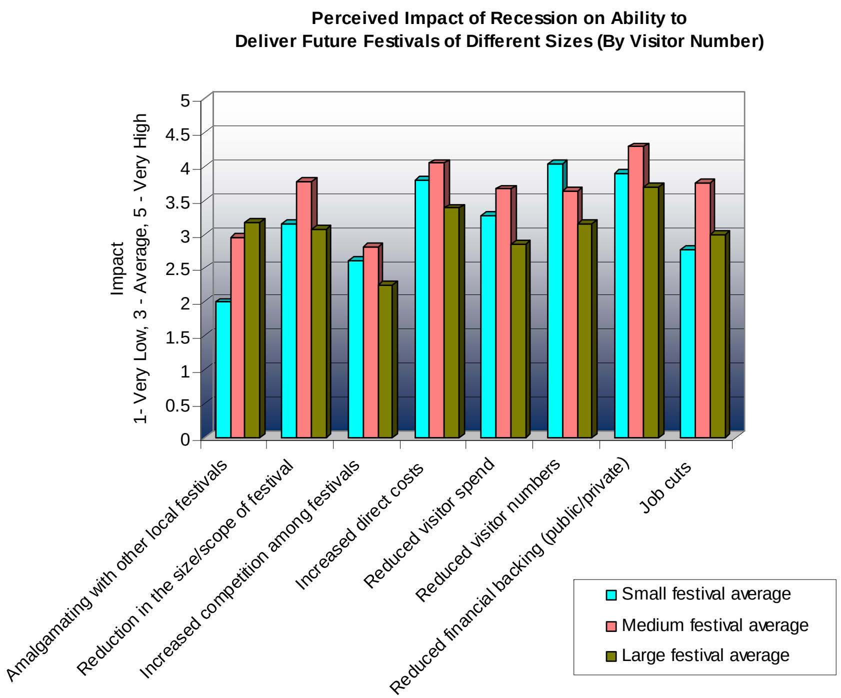
- Reduced financial backing (public/private)
- Reduced visitor numbers
- Increased direct costs

These components, along with reduced visitor spend, and, reduction in the size/scope of festival, are generally the same components perceived by a number of organisers to have the greatest likelihood of affecting respective festival offers.

The relevance of these components in relation to festivals measured by visitor attendance levels and turnover sizes is explored further in the next section.

Festivals of Different Visitor Attendance Levels

The chart below shows the perceived impact that each identified components of change could have on the delivery of festivals of different size cohorts defined by visitor number.



Whilst organisers of small festivals perceive the likelihood of experiencing most key components to be below ‘average’, the corresponding measure of impact that the same drivers could have on small festivals is notably greater, particularly in relation to reduced visitor numbers, reduced visitor spend and increased direct costs.

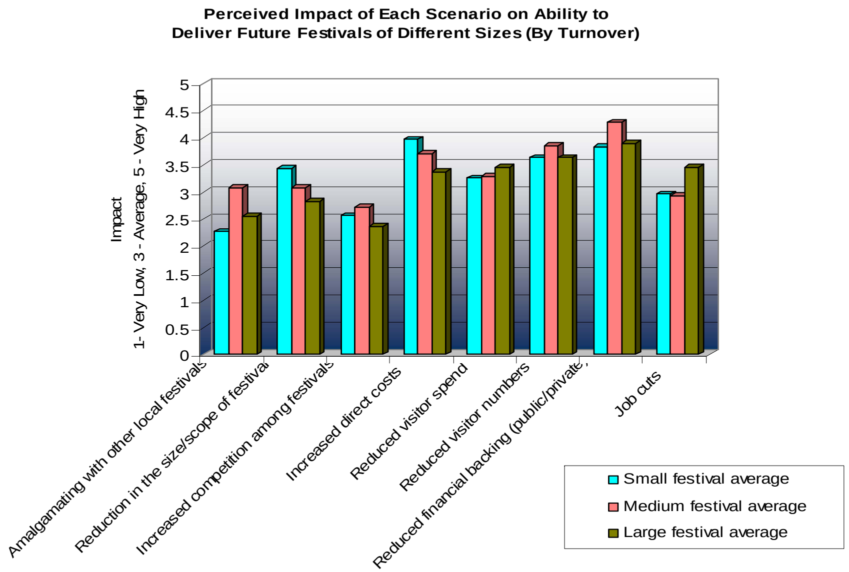
This pattern of results suggests there may be some merit in delivering discrete targeted measures of support to help small festivals to manage these key components of change and avoid suffering disproportionate impact from the recession which may irreversibly change the further festival delivery.

Across the majority of identified components, organisers of medium size festivals considered the potential impact on future delivery to be higher than organisers connected to small or large festival cohorts. This may suggest that medium size festivals are more vulnerable to changing market conditions particularly in relation to key economic components including job cuts, reduced financial backing and reduced visitor spend.

Results secured from large festival organisers support a more robust position in relation to the possible impact of the identified recession components, which could suggest that any future investment and support offer is targeted at identified need among defined festival groups defined by different relative sizes and exposure to adverse market conditions. This approach could be supported through a cluster model in a straightforward way, and capitalise on the perceived robust position of larger festival groups to partner with and support small and medium festivals to further help reduce the effects of the downturn.

Size Measured as Turnover

The chart below shows the perceived impact that each identified components of change could have on the delivery of festivals of different size cohorts defined by turnover.



Organisers of festivals of medium turnover size considered the impact of most identified components to be between ‘average’ to ‘high’, with the exception of job cuts and increased competition among festivals. Small turnover festivals indicated a higher perceived impact resulting from increased direct costs and reduction in size/scope of festival, than the perceptions of small festivals measured by visitor audience levels.

This could suggest that festivals with the smallest financial means could be adversely impacted by a broader range of components of the recession, and require additional and targeted support to address this.

The results show that perceptions of the possible impact of economic components on festivals of large turnover, were generally higher than for averages of the large festival cohort measured by visitor numbers. This included to assessment of job cuts as having between ‘average’ to ‘high’ impact, indicating that larger turnover festivals may be more vulnerable to consequences of forced redundancies through the recession in reducing the ability to maintain the festival offer into the future.

Organisers of festivals of all turnover sizes perceive the impact of three distinct components of change to be broadly the same, including: reduced financial backing; reduced visitor numbers; and reduced visitor spend. Such similarities in focus among festivals of different turnover sizes could be used to inform the development of targeted support through a festival cluster to address issues of falling financial backing and changing visitor numbers and spend levels.

International Links

- large scale festivals now concentrate on building visits by cultural tourists to their events – for example Brighton Festival state in their Corporate Strategy 2009 – 2012 one of their strategic aims is to "*be a key driver in developing (Brighton & Hove's) status as an international cultural and conferencing destination*"[20]

- White Night Festival, held for the first time in 2008 in Brighton, has parallels to similar events in Paris, Rome and Brussels.

- There is an established 'circuit' for artists touring to the major international festivals. Shows that are premiered at one festival may well move on to others if the critical and audience response merits it. Organisations such as BAFA provide networking and information exchange opportunities for festival professionals.

Projecting a Future Festival Offer

The economic contribution of festivals in the South East is influenced by a wide range of variables and factors which impact on the level, type and variation of growth and decline realised within a given period. This study concentrates on a basic level assessment of future economic change measured as a function of the identified components of change across the festival sector within the South East.

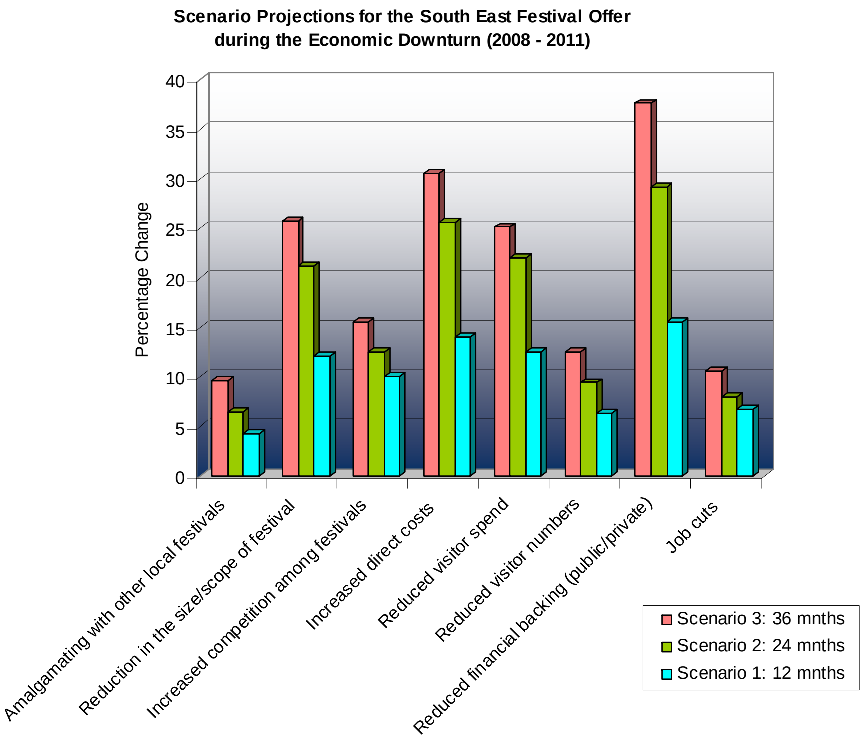
The South East has specific and well defined economic trends, which can be evidenced by data compiled since the 1990s. However, there is far less data relating to shift changes in the economic impact of the region's festivals. Scenario projections for the collective festival offer in the South East have been derived from forecasting models utilising an underlying evidence base including SEEDA Economic Briefing Reports and Labour Market Updates, Tourism South East Recession Survey Reports and regional and sub-regional economic assessments and sector growth analysis.

The scenario projections of the festival offer in the South East have been considered against each of the identified components of change and calibrated by a percentage of change measure, assuming a starting value of 0% change prior to the recession. Each projection covers a period of 12 months, measured from 2008. Within the scope of this study, the scenario projections are intended to provide a broad indication of possible change.

[20] Brighton Dome & Festival Corporate Strategy 2009 - 2012

Key Sector Changes

The projections of the South East festival offer relative to each defined component of change, as measured between 2008 and 2011, are shown in the chart below.



The nuanced factors influencing the development of the overall regional festival offer are considered against each component of change.

Job Cuts

Most festivals in the South East are considered to be relatively sheltered from exposure to significant overheads resulting from hosting large staff teams. This study has identified that direct employment among festivals of all size cohorts across the region is low when measured against other public, private and third sector organisations with comparable turnover.

The projection results support earlier findings that show that most festival organisers surveyed consider the likelihood of job cuts caused by the recession to be low. The anticipated change in employment among festivals (including voluntary positions) is projected to be 6% below 2008 levels in the first 12 months. Beyond this period, a continued downturn will force further cost reduction measures, and as such there will be higher rates of job loss and reduction in numbers of people recruited at key stages of festival delivery if the downturn is pro-longed into a second and third year, resulting in further reductions in employment by 8% and 10.6% in each year respectively. This is likely to particularly affect medium size festivals and a number of small festivals where resource pools are comparatively low with limited opportunities to outsource key elements of delivery.

Reduced Financial Backing (Public/Private)

Reduction in financial backing from both public and private sources will be the most significant factor shaping the festival offer in the South East throughout the economic downturn. Within the first projected 12 months, combined financial backing secured by festivals is anticipated to fall by at least 15% compared with 2008 levels, with further reduction occurring by 24 months to 29%, and continuing up to 36 months, where financial backing will be around 37% below 2008 levels.

The projections show that the greatest rate of decline in financial backing secured by festivals will occur within the first 24 months, when it is expected that key corporate donors and statutory funders will reduce their financial commitments most, in line with the ailing economy. Beyond this period as the downturn is pro-longed, the actual rate of decline in financial backing will begin to fall, as corporate giving and public funding begin to stabilise following a period of forced consolidation.

Reduced Visitor Numbers

A significant change to the number of visitors attending festivals in the South East is not expected to be realised from the economic downturn. Whilst most festivals indicate that they attract a varied audience of differing proportions of local, regional, national and international visitors, any reductions in visitor numbers is likely to be focused among those groups travelling further (and incurring more expense) to visit and stay at a selected festival. This is likely to affect more medium and large festivals attracting a broad audience profile.

However, the projections also account for increases in visitor numbers occurring across free festivals, which will draw higher numbers of local groups specifically seeking low cost entertainment options. These combined factors lead to projections of an overall fall in visitor numbers attending festivals in the South East by 6% in the first 12 months, 9% within 24 months and 12.5% by 36 months. If the recession is not pro-longed beyond 24 months, then visitor numbers are expected to increase quickly to pre-downturn levels, reflecting the link between increases in expendable cash and growth in leisure-based spending.

Reduced Visitor Spend

Reductions in visitor spend at festivals across the region will be most significant over the first 24 months of the downturn, with a 12.5% reduction occurring in the first 12 months, rising to 22% by 24 months.

Reduction in visitor spend is only partly linked to projected falls in visitor numbers, where falling attendance levels are typically accompanied by corresponding falls in calculated unit visitor spend. Whilst there will be some falls in visitor levels, as described above, reductions in visitor spend will be more acute, reflecting wider pressures of a contracting regional and national economy, including rising unemployment, wage freezes and reduced working hours in key sectors. If the downturn is prolonged beyond 24 months, then visitor spend will continue to reduce but at a lesser rate, amounting to 25% below 2008 levels by 36 months.

As with visitor numbers, if the downturn is not pro-longed beyond 24 months, then visitor spend levels are expected to increase quickly.

Increased Direct Costs

Rising direct costs are viewed by the sector to be the second most significant component of change affecting festivals in the South East during the recession. Costs will increase most across the first 24 month of the projected timeframe, rising to over 25% above 2008 levels by 2010. If the recession continues into 2011, then costs will rise a further 5% to just over 30% above 2008 levels.

Whilst the rise in direct costs will be significant, discrete influencing factors are likely to determine the overall impact of cost rises on festivals of various sizes and locations in the region. These factors could include emerging limitations in the availability of suppliers and differing increases management costs affecting festivals of different sizes, and any future support offer should seek to target such identified influencing factors as a means to addressing wider cost rise issues.

Increased Competition amongst Festivals

Competition among festivals is inherently low, owing to the diversity and richness of the South East's festival offer, where repetition and duplication between festivals is limited. Worsening economic conditions will lead to visitors choosing to attend fewer festivals, as detailed above, and this factor, combined with falling levels of visitor spend, will act to increase perceived competition between festivals that traditionally draw a large visitor base and appeal to non-specialist interest groups that typically attend a number of festivals in a year.
Competition between festivals will rise modestly by less than 10% in the first 12 months from 2008, and will continue to increase incrementally if the downturn continues, rising to just over 15% by 36 months. Owing to the organic nature of the festival offer in the South East, changes to levels of competition between festivals will remain a minor component of the recession for the vast majority of organisers in the region.

Reduction in the Size/Scope of Festivals

The size and scope of festivals in the South East will be reduced by 12% in the first 12 months from 2008, rising to over 21% by 24 months and just under 26% by 36 months, should the downturn continue. This reflects the identified trend among medium and some large festivals in the region, measured by visitor levels and turnover, which indicates some susceptibility to an economic downturn leading to reductions in size and scope of respective festival offers.

Primary drivers affecting size/scope of these festivals would be connected to:

- Internal cost reduction
- A reducing internal capacity
- Alignment to a falling visitor base and visitor spend profile

These drivers typically cut across a number of the defined components of change, and as such, any future support and intervention offer should be coordinated to tackle this cross-cutting nature using a portfolio of measures with a particular focus on medium and large festivals.

Amalgamation between Festivals

Amalgamation between festivals will act to consolidate the overall regional festival offer. However, occurrences of festivals joining and merging will remain low throughout the downturn period, with just over 4% more amalgamations projected within 12 months and under 6.5% within 24 months.

If the recession is prolonged, then instances of amalgamation between festivals will increase at a faster rate, to just under 10% above 2008 levels within 36 months. The levels of amalgamation resulting from the effects of the recession will be contained to a minimum since the opportunities for festivals to join-up are limited by factors restricting mutual compatibility including festival sizes, geography, delivery timetables, specialisms, resources and visitor demand.

Impact of the recession on the availability of artistic product and levels of cultural consumption

Recent research discusses the impact of the current recession on the creative industries in the South East.[21] Traditional creative industry sectors adversely affected by the recession are predominantly in print and advertising which is impacting on the opportunities available to festivals for in-kind support for promotion. Creative production in music, performance and visual arts is forecast to decline, which may impact on the availability of artistic product. Falling consumer spending on ticketed events may also prove a challenge to festivals which are reliant in income from ticket sales. However, the research posits that

"*the South East is not likely to experience the depth and decline of the creative sector across Great Britain as a whole".*

The impact of the downturn on the creative industries, Experian, for SEEDA, July 2009[21]

Business Confidence Levels

There is some understandable anxiety among festival organisers about the future for festivals in the region, particularly in view of the overall decline in the various areas and opportunities around future investment.

Amongst the festivals interviewed there is an awareness of the importance of maintaining the confidence of investors and stakeholders and also of satisfying the expectations of audiences.

"Canterbury Festival must send out a confident message – business as usual!"

"In Whitstable, people are getting involved and rising to the occasion, there is a sense of solidarity in the community and people are taking ownership of the Festival. Although this is less desirable from an artistic point of view the increase in community involvement is to be welcomed."

For the established festivals such as Broadstairs Folk Week....*"confidence is the same as last year. It's a tried and tested formula."*

Confidence is also affected by positive development at a local level such as the new high speed rail link to Folkestone which is anticipated to have a positive impact on the cultural businesses.

People are increasingly taking holidays and short breaks at home in the UK. This change in the domestic market provides a potential opportunity for the festival sector increase their visitor numbers.

But the fragility of the festival sector should not be underestimated ... *"we live hand-to-mouth each year and even without the recession planning a sustainable future over the next three years is a task in itself."*

Mitigating the Effects of the Recession

Recession proofing and support for the festival sector

The issue for cultural organisations as voiced by Charlotte Jones CEO of the Independent Theatre Council is “to build organisational resilience, so that the recession does not destroy the intellectual and social capital that we create and which all our communities will need if we are to get through the turbulence ahead“.

v. The majority of festivals are small scale and will not have the financial and human resources and competencies to develop the strategies needed to respond to a rapidly changing economic environment.

vi. The current mixed business model of grants, corporate sponsorship and earned income may need to rapidly develop to meet the UK’s changing economic conditions. Development may include a more even spread of revenue streams across the business model, or a realignment with the streams which have the greatest viability.

vii. The traditional models of governance through festival boards and committees may not always have the level of financial and business skills to ensure sustainability in a time of change.

viii. There is far greater potential for festivals to develop collaborative strategies and approaches to building audience levels, increasing participation and expanding into new markets.

ix. Sector growth is hampered through limited knowledge exchange and workforce development.

x. Is it time to broker strategic alliances between organisations, both to build skills, share expertise and market intelligence and perception of trends and change in the operating environment?

Other leading cultural organisations in the region, such as Chichester Festival Theatre (CFT) are working with a business consultant on scenario planning in the event that sponsorship may decline, adopting several strategies to ensure their future viability. These include communicating and capitalising on the success of the Festival Season in order that commercial supporters feel “that the magic to rubs off “on their businesses; avoiding reliance on any one source of corporate sponsorship so that risk is evenly spread. They are maintaining relationships with their sponsors and donors to understand each others business needs and circumstances. Many of the Season’s corporate sponsors are now using their support to provide benefits for their workforce rather than as corporate hospitality.

CFT are also finding that all sectors of business are affected by the recession: law and accountancy companies who are long-term supporters are experiencing difficulties. Within areas such as West Sussex with few large businesses, and limited opportunities for new income sources, cultivation and support of existing patrons is essential.

Support Packages Provided in Other Regions

Across England regional development and cultural agencies have been slow to come to terms with the impact of the recession upon the cultural (and festival) sector.

Arts Council England has yet to make public any strategy or intervention planning which would benefit the sector and has only just begun to engage in a public debate over what to do next.

Across the regions there is little targeted assistance provided by the RDAs. Festivals are not perceived by many to be strong economic drivers in their areas and resources have been directed towards other industrial sectors.

There are a few notable exceptions.

North East

In the North East culture10, a partnership between One North East and Arts Council England have undertaken a significant number of economic, social and cultural evaluations and impact studies of the cultural (including festival and celebration) offer in the region. They have created a Festivals & Events Toolkit aimed at providing key information for festival and event organisers i.e. legal, marketing advice and templates to use for funding applications etc.

Culture10 acts as a pump primer for the festivals in the North East. Culture10 is a creative partner; both directly producing events but also offers advice, support, brokerage of partnerships and relationships.

Each year, several key projects are initiated by the Creative Director and her team.

In addition, partner events are invited from cultural and sporting agencies and local authorities. Sub regional meetings are held regularly to jointly identify priorities which build on strengths.

Yorkshire

While Yorkshire Forward have limited data specifically about festivals as they have yet to do any research in this area; they do have a major events strategy and have developed a Regional Event Growth Fund.

This is a new pot of money that becomes available in the next few months.

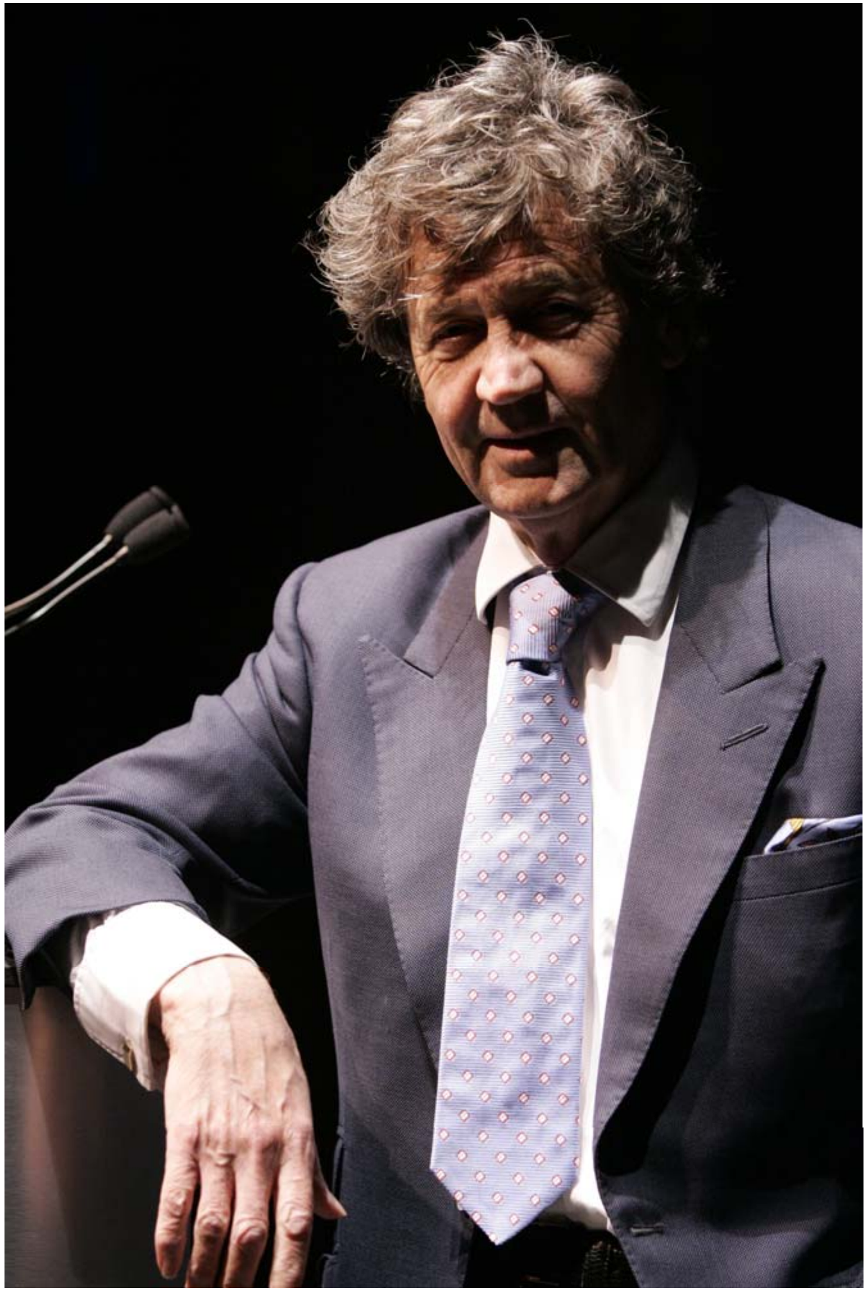
Festivals and large events that can prove they have growth potential can bid in. The pot will only support added value activity not core activity.

The Yorkshire Tourist board has a limited pot money available, primarily for the promotion of events rather than to enhance the product offering.

East of England

The East of England Development agency EEDA has a wide range of events which include Aldeburgh Festival, Luton Carnival and major sporting events. These events have either grown organically or been developed by promoters or local authorities rather than as a planned programme. EEDA envisage that the staging of part of the 2012 Olympics are an important opportunity for the region and commissioned a Major Events Strategy for the region. There is a plan for investment based on economic development principles and a scoping of the potential capacity building needed to enable the region to participate in major events and international initiatives.

They are currently setting up a framework and steering group to oversee the provision of funds on a strategic level. They have yet to confirm the level of support they (and their partners) are able to provide.



Facing the Future - Issues and Strategies on Targeting Support and Investment

The South East economy is supported by a diverse and rich mix of festivals and they form a substantial strand of the regions' cultural offer. Although there is some degree of recognition of the contribution made by the festival sector to the region there are still many issues for further discussion and exploration.

If the region wishes to implement successful clusters at key locations across the South East in order to secure a sustainable regional festival offer a variety of key issues need further examination.

i. Recognition of the strengths and assets of the festival sector but also of its fragility. The sector has experienced rapid growth in the past 15 years and in some areas the issue of over supply may be significant.

ii. There is a hierarchy of festivals in the region that needs to be recognised. Understanding the interrelationship between established and emergent festivals is important, particularly with regard to sharing and developing new products. A greater understanding about how ecological synergies and collaboration can benefit the overall cultural and creative economy will equip SEEDA with the knowledge as to how to make a meaningful intervention. **Maintaining the stability of the Region's small group of first tier festivals must be the investment priority, to ensure that their national and international status is maximised**. The second tier festivals are those most under threat in this recession: in some cases they have the capacity to develop into first tier events and targeted investment and intervention would support this process.

iii. Gaps in the evidence: many festivals do not undertake research to gather the evidence needed to support their case for investment and support. Further development and expansion of the evidence base on the role and contribution of the festivals sector is an immediate and necessary action in order for future decision making on investment and support to prove effective and meaningful. This study demonstrates that only a fraction of the festivals were able to provide evidence about their economic, social or cultural benefits.

iv. Support for success and prioritisation of investment will maintain competitive advantage in an increasingly competitive environment.

"they know their business better than we, as local authorities, do and we need to listen to the sector and what they say they need" [22]

v. Develop greater understanding and responsiveness within the festivals sector for their potential in developing and adding value to the visitor offer and extending the tourism season into the shoulder and winter months.

vi. Identification of which festivals share a common agenda or aspiration and support this process of knowledge exchange to build and share sector expertise, including information on the state of the region to data on audiences and market trends.

[22] Paula Murray Brighton and Hove Council

vii. Increasing the profile of the festivals sector through collaborative marketing and a more cohesive approach between the cultural and tourism sectors at local authority and agency levels.

viii. Many festivals would benefit from up-front investment at the start of their planning cycle to enable them to access business development and fundraising expertise. Many festivals are run on a part time or voluntary basis and although they may have expertise in artistic programming they may not have the business skills to implement and sustain their artistic approach.

ix. Festival organisers often have to contend with a considerable amount of bureaucratic procedures and “red tape”, which can be costly in terms of the time and effort required. This includes the introduction of new local authority regulations to render events and festivals more sustainable – with regard to matters of waste disposal, use of energy, use of physical spaces and transport issues. These will incur additional costs for organisers and it would be more beneficial to put these on hold (in the short-term) as they do not help the business case of organisers.

x. Many aspects of event planning - from more coordination in the scheduling of festivals and events to avoid clashes or build synergy - to more liaison across local authority departments to ensure that the public realm is presentable for the period when events are taking place and that engineering works etc are not in progress.

Targeted Support and Investment

Minimising the effects of the economic downturn on the festival offer of the South East will require a multi-faceted support and investment structure that responds to the diversity of the festival sector and addresses underlying causal factors that serve to increase the potential impact of the recession on festivals of all sizes across the region.

Central to any future support offer should be the aim to promote and retain the socio-cultural, economic and environmental benefits afforded by the South East’s festivals, highlighting opportunities to deliver such support through a festival cluster approach.

For SEEDA to implement successful festival clusters at key strategic locations in the South East and help to secure the wider sustainability of the festival sector in the region it is advisable to consider the following targeted measures of support based on an understanding of the economic and other impacts of the region’s festivals, as set out on the next page.

The outcomes of SEEDA investment in the festival clusters needs to be evaluated as a model for targeting investment and support through collaborative enterprise.

	Targeted Support and Investment	
	Support Measure	**Details**
1	**Addressing fall in financial support** (public/private)	Reduction in the level of financial support secured through public and private sources is projected to be the component of change that will affect festivals in the South East the most during the downturn. Possible steps to limit the effects of reduced financial backing include: i. Increased marketing of regional festival offer ii. Online publication of target funding and corporate sponsorship opportunities for festivals, updated regularly iii. Promotion of joint-working ventures between festivals using the SEEDA cluster model iv. Programme of proactive engagement with new funding bodies and corporate bodies, backed by SEEDA v. Development of a Financial Sub Group to represent issues around festival funding among key strategic partners and potential public and private backers

Targeted Support and Investment		
	Support Measure	**Details**
2	**Minimising affects of rising direct costs**	Direct costs furnished by festivals in the region are projected to increase significantly with the continuation of the downturn. Targeted measures to address this could include: vi. Identifying joint purchasing opportunities through festival clusters to increase negotiation potential of festivals, particularly small and medium size festivals vii. Targeted support to festival organisers to identify cost reduction measures complemented by good practice case studies in effective cost management for festivals of different sizes viii. Maintaining a central list of suppliers and delivery agents providing competitive and discounted rates to South East festivals ix. Develop an online marketplace where organisers and suppliers can interact and coordinate regional joint purchasing opportunities – perhaps supported as part of a festival cluster network

Targeted Support and Investment		
	Support Measure	**Details**
3	**Maintaining the diversity of the regional festival offer**	Effects of the economic downturn are projected to reduce the size/scope of festival offer in the South East, resulting from a number of cross-cutting factors. Opportunities to help maintain the diversity of the regional festival offer include: x. Developing a new 'festival brand' for the South East to be used as a key marketing and promotion tool xi. Capitalising on the opportunities presented through the 2012 Cultural Olympiad to raise the South East festival profile on a national and international level xii. Using funding opportunities to encourage increased accountability among organisers to deliver diverse and targeted individual festival offers through the recession xiii. Harness the potential of festival clusters to raise visibility of the regional festival offer and promote innovative delivery among festivals of different sizes xiv. Broker further investment from public and private sources, utilising critical mass afforded by clustered festivals to attract new and diverse funding

Targeted Support and Investment		
	Support Measure	**Details**
4	**Investment in festival clusters support infrastructure**	To ensure festival clusters can be best positioned to address key identified impacts from the current recession, investment should be targeted to develop a support structure tailored to the needs of the regions festivals, including: xv. Increasing productivity through shared resources, increased relative capacity and access to a wider range of products and services xvi. Driving innovation through brokered linkages between festivals of different sizes and specialist foci xvii. Stimulate new approaches to address key economic components of change including reduced visitor spend, lower financial backing and increasing direct costs xviii. Building competitive advantage at a regional, national and international level to attract more inward investment in the South East's festival offer

Creating Clear Criteria for Future Investment in Festivals

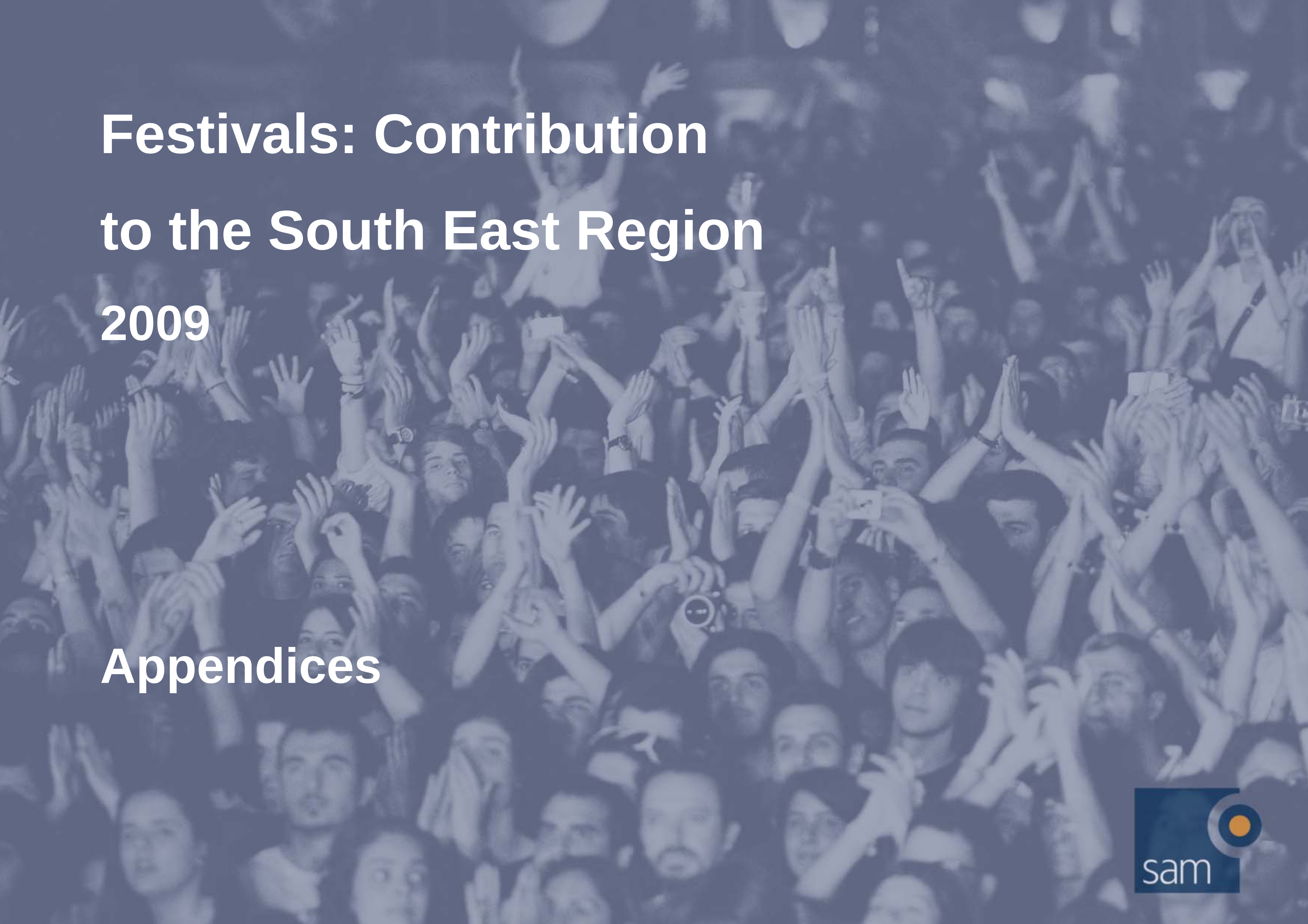
Selection Criteria Matrix		
	Criteria Type	**Details**
1	**A clear rationale for the festival**	- supported by research and planning - identification of outcomes and indication of potential return on investment - demonstration of viable and sustainable income and organisational base - capacity to build or expand region's strengths
2	**Dimensions of the festival /event**	- potential to create public interest and to draw audiences and visitors into the region - involvement of artists of international and national status or artistic innovation which will position it as a cultural leader - ability to generate positive and measurable media profile for the region - support and recognition from cultural agencies eg Arts Council England

3	**Synergy with stakeholder agenda**	- identification of lead stakeholders - understanding of the agenda and potential roles of stakeholders - fit with regional strategies, priorities and aspirations - fit with local strategies and area ambitions - delivery against stakeholder objectives - position in overall regional cultural provision - sector and stakeholder support
4	**Anticipated economic impacts and outline return on investment**	- contribution to local economy through direct spend - impact on visitor economy direct and indirect - ability to lever in additional investment - ability to develop human capacity through the development of skills and expertise

5	**Social and community impact**	- ability to build future capacity - increased opportunities for local communities for engagement and participation - contribution to local sense of place, civic pride and community regeneration - potential to increase social capital and opportunities for social inclusion
6	**Environmental impact**	- impact on environmental improvement or enhancement - creative use of heritage or other spaces
7	**Identification of risk and mitigation of risk strategies**	- Provision of business support complemented by creative expertise in scenario planning and option appraisal of risk
8	**Monitoring and evaluation strategies and mechanisms**	- creation of evaluation methodologies and toolkit and advocacy of a consistent approach to collection of evidence

Festivals: Contribution to the South East Region 2009

Appendices



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- Guildford International Music Festival
- Hampshire County Council
- Hastings Borough Council
- Kent County Council
- NALGAO
- Oxford Inspires
- PUSH
- Tourism South East
- West Sussex County Council
- Whitstable Oyster Festival
- Winchester Hat Fair

Appendix Two - Sources

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Appendix Three – South East Festivals

Festival Name	Local Authority	Artform	Frequency	Month	Duration	Free
80's Rewind Festival 2009	Oxfordshire	Music - Pop	1	August	3	n
Accessfest	Southampton	Music - Mixed	1	May	no info	n
Adur Festival	West Sussex	Mixed	1	June	16	n
Amersham Festival of Music	Buckinghamshire	Music - Classical	1	April	14	n
Artists and Makers Festival	West Sussex	Visual Arts	1	July	4	y
Artists Open Houses - Brighton	Brighton & Hove	Visual Arts	1	May	28	y
Arts Alive	Surrey	Mixed	1	October	31	n
Arts Festival Parade	Isle of Wight	Celebrations and Carnival	1	July	1	y
Artwave	East Sussex	Other	1	Aug - Sept	15	y
Artweeks - Oxfordshire Visual Arts Festival	Oxfordshire	Visual Arts	1	May/June	60	y
Arundel Festival	West Sussex	Mixed	1	August	10	n
Aylesbury Festival	Buckinghamshire	Music - General	1	July	2	n
Banbury Folk Festival	Oxfordshire	Music - Specialist	1	October	3	n
Bang Face - The Weekender 2009	East Sussex	Music - Contemporary	1	April	3	n
Banstead Arts Festival	Surrey	Mixed	1	May	15	n
Barn Green Music Festival	West Sussex	Mixed	1	July	1	y
Basingstoke Live Music Festival	Hampshire	Music - Mixed	1	July	2	n
Basingstoke Music and Arts Festival	Hampshire	Mixed	1	March	5	n/a
Battle Festival	East Sussex	Mixed	no info	no info	no info	y
Beach Dreams	West Sussex	Celebrations and Carnival	1	June	14	n
Beachdown Festival	Brighton & Hove	Music - Pop	1	August	3	n
Bentworth Blues Weekend 2009	Hampshire	Music - Specialist	1	August	3	n
Bestival	Isle of Wight	Mixed	1	September	4	n
Big Beach Boutique	Brighton & Hove	Music - Pop	1	Sept	1	n
Big Day out Music and Performing Arts Festival	Bracknell Forest	Mixed	1	July	1	n
Big Moo Milton Keynes	Milton Keynes	Mixed	1	July	3	n
Birdman International Festival	West Sussex	Other	1	July	2	y
Bishop's Waltham Festival	Hampshire	Mixed	1	July	7	n
Black Horse Festival	East Sussex	Music - Mixed	1	May	4	n
Blissfields Festival 2009	Hampshire	Music - Mixed	1	July	3	n
Blues on the Farm	West Sussex	Music - Specialist	1	June	4	n
Bognor Music & Arts Festival	West Sussex	Mixed	1	August	2	
Bognor Regis Town Carnival	West Sussex	Celebrations and Carnival	1	June	2	y
Boughton Aluph - Stour Music Festival	Kent	Music - Specialist	1	June	10	n
Boxgrove Priory & Early Music Festival	West Sussex	Music - Specialist	no info	no info	no info	n
Brighton Carnival	Brighton & Hove	Celebrations and Carnival	1	July	1	y
Brighton Festival	Brighton & Hove	Mixed	1	May	23	n
Brighton Festival Fringe	Brighton & Hove	Mixed	1	May	23	n
Brighton Festival of Early Music	Brighton & Hove	Music - Specialist	1	October		n
Brighton Hip Hop Festival (Rising Styles)	Brighton & Hove	Music - Specialist	1	no info available	2	n
Brighton Live	Brighton & Hove	Music - Mixed	1	October	4	n
Brighton Photo Biennial	Brighton & Hove	Other	0.5	Oct/Nov	40	n
Broadstairs Baroque Festival	Kent	Music - Specialist	1	July	5	no info
Broadstairs Dickens Festival	Kent	Performing Arts	1	June	5	n
Broadstairs Folk Week	Kent	Music - Specialist	1	August	7	n
Bromley Festival of Music and Speech	Kent	Mixed	1	March	no info	y
Brunswick Festival	Brighton & Hove	Mixed	1	August	2	y
Buckingham Summer Festival	Buckinghamshire	Music - Classical	1	July	8	n
BunkFest 2009	Oxfordshire	Mixed	1	September	3	n
Burford Festival	Oxfordshire	Mixed	0.5	July	15	n
Burgess Hill Festival	West Sussex	Mixed	1	June	1	n
Burning of the Clocks	Brighton & Hove	Celebrations and Carnival	1	December		y
Butserfest 2009	Hampshire	Music - Mixed	1	September	1	n
Canterbury Festival	Kent	Performing Arts	1	October	15	n
Carnival 2009	Milton Keynes	Celebrations and Carnival	1	June	1	y
Castle Concerts 2009	Medway Towns	Music - Mixed	1	July	4	n
Castlefields Festival	Portsmouth	Mixed	1	April	1	y
Caterham Festival	Surrey	Mixed	1	May-June	37	n
Chalgrove Festival 2009	Oxfordshire	Music - Mixed	1	August	3	n
Charleston Festival	East Sussex	Literature	1	May	9	n
Charleston Festival (Small Wonder)	East Sussex	Literature	1	September	10	n
Chichester Film Festival	West Sussex	Film	1	Aug/Sep	16	n
Chiddingly Festival	East Sussex	Mixed	1	Sep - Oct	18	n
Chinese New Year	Brighton & Hove	Celebrations and Carnival	1	Feb	9	y
Chobham Music Festival	Surrey	Music - Mixed	1	September	9	n
CIAO! Festival	Bracknell Forest	Mixed	1	June	4	n
CineCity	Brighton & Hove	Film	1	November - December	17	n
Coastal Currents	East Sussex	Visual Arts	1	Aug/Sep	21	y
Colour Out of Space	Brighton & Hove	Mixed	1	Sept	3	n
Concert in the Park 2009 at Goodnestone Park Gardens	Kent	Music - Mixed	1	June	1	n
Cornbury Festival	Oxfordshire	Music - Pop	1	July	2	n
Cowes Carnival	Isle of Wight	Celebrations and Carnival	1	August	2	y
Cowes Christmas Carnival	Isle of Wight	Celebrations and Carnival	1	December	1	y
Crawley Celtic and Irish Festival	West Sussex	Mixed	1	August	1	n
Crawley Festival	West Sussex	Mixed	1	June/July	15	n
Crawley Folk Festival	West Sussex	Music - Specialist	1	June	3	y
Crawley International Mela	West Sussex	Celebrations and Carnival	1	November	1	n
Croydon Mela	Surrey	Celebrations and Carnival	1	August	1	y
Croydon Summer Festival	Surrey	Mixed	1	August	1	y
Dance For Camera	Brighton & Hove	Mixed	1	Dec	3	n
Dancin' Oxford	Oxfordshire	Dance	1	February-March	52	n
Deal Festival of Music & the Arts	Kent	Music - Mixed	1	July	11	n
Deal Maritime Folk Festival	Kent	Music - Specialist	1	September	3	n
Dickens Festival	Medway Towns	Mixed	1	June	22	y
Dickensian Christmas	Medway Towns	Literature	2	December	2	y
DidgHeadRadioFest 2009	Isle of Wight	Music - Mixed	1	August	3	n
Discover Culture	Wokingham	Mixed	1	May-September	62	n
Dorchester Festival 2009	Oxfordshire	Mixed	1	May	11	n
Dragon Boat Festival	Milton Keynes	Other	1	June	1	n
Durrington Festival	West Sussex	Mixed	1	June	8	y

Festival Name	Local Authority	Artform	Frequency	Month	Duration	Free
East Grinstead Festival	West Sussex	Mixed	1	July	1	y
East Grinstead Music & Arts Festival	West Sussex	Mixed	1	April - May	1	n
East Preston Festival	West Sussex	Mixed	1	June	8	n
Eastbourne Festival	East Sussex	Mixed	1	April	15	n
Eastbourne International Folk Dance Festival	East Sussex	Dance	1	May	4	n
Eastbourne Lammas Festival	East Sussex	Mixed	1	August	2	y
Eastleigh Mini Mela	Hampshire	Celebrations and Carnival	1	August	1	y
End of the Pier Film Festival	West Sussex	Film	1	April	8	n
Etchingham Arts Festival	East Sussex	Mixed	1	JULY	8	n
Eurofair	Kent	Mixed	1	September	3	y
Exbury Scarecrow Festival	Hampshire	Mixed	1	August	3	n
Expo Art	Brighton & Hove	Visual Arts	1	July	3	y
Fairport's Cropredy Convention 2009	Oxfordshire	Music - Specialist	1	August	3	n
Farnham Creates	Surrey	Other	1	May	1	n
Farnham Grows	Surrey	Other	1	July	1	n
Faversham Carnival	Kent	Celebrations and Carnival	1	October	1	y
Faversham International Hop Festival 2009	Kent	Mixed	1	September	2	y
Festibelly 2009	Hampshire	Music - Mixed	1	August	1	n
Festival of Arts (pt 1)	Hampshire	Mixed	1	March	3	n
Festival of Arts (pt 2)	Hampshire	Mixed	1	April	3	n
Festival of Crafts	Surrey	Visual Arts	1	October	2	n
Festival of Wick	West Sussex	Mixed	1	no info	no info	n
Finchcocks Festival	Kent	Music - Specialist	1	May	2	n
Floreston Festival at Peasmarsh	East Sussex	Mixed	1	June	4	n
Folk on the Green	Milton Keynes	Music - Specialist	1	June	1	y
Folkestone Literary Festival	Kent	Literature	1	November	7	n
FolkStation	Isle of Wight	Music - Specialist	1	July	3	n
Freshwater Carnival	Isle of Wight	Celebrations and Carnival	1	July	1	y
Frittenden Festival	Kent	Mixed	1	April	1	n
Fuse Medway Festival	Medway Towns	Mixed	1	June	15	y
Garsington Opera	Oxfordshire	Music - Specialist	1	July	30	n
Gift	Surrey	Other	1	November	2	y
Glade Festival 2009	Hampshire	Music - Specialist	1	July	4	n
Glastonwick 2009	West Sussex	Mixed	1	June	3	n
Glyndebourne Festival Opera	East Sussex	Music - Specialist	1	May-August	70	n
Godalming Music Festival	Surrey	Music - Mixed	1	Feb/March	21	n/a
Goodnestone Concert in the Park	Kent	Music - Classical	1	June	1	n
Gosport & Fareham Easter Festival 2009	Hampshire	Mixed	1	April	5	n
Gosport and Fareham Folk Festival	Hampshire	Music - Specialist	1	April	4	n
Great Linford Waterside Festival	Buckinghamshire	Mixed	1	June	3	y
Greenwave	Brighton & Hove	Mixed	1	July	2	n
Guildford Book Festival	Surrey	Literature	1	October	10	n
Guildford Book Festival	Surrey	Literature	1	October	10	n
Guildford International Music Festival	Surrey	Music - Mixed	1	March	22	n
Guildford Spring Music Festival	Surrey	Music - Mixed	0.5	March	7	n
GuilFest 2009	Surrey	Music - Pop	1	July	3	n
Guilford Summer Festival	Surrey	Mixed	1	June-August	42	n
Gypsy Arts Festival South East	Kent	Mixed	1	September	2	n
Hampshire's Water Festival	Hampshire	Mixed	1	August	1	y
Hampton Court Palace Festival	Surrey	Music - Mixed	1	June	12	n
Haslemere Festival	Surrey	Mixed	1	May	17	n
Hastings Bonfire Celebrations	East Sussex	Celebrations and Carnival	1	October	1	y
Hastings International Poetry Festival	East Sussex	Literature	1	October	2	n
Havant Literary Festival	Hampshire	Literature	1	September-October	10	n
Henley Festival	Oxfordshire	Mixed	1	July	5	n
Herne Bay Festival	Kent	Mixed	1	August	8	y
Hobble on the Cobbles	Buckinghamshire	Music - Specialist	1	August	1	n
Hobbs Farm Festival	West Sussex	Mixed	1	September	3	n
Hobby Horse Festival	Oxfordshire	Celebrations and Carnival	1	July	3	y
Hop Farm Festival 2009	Kent	Music - Pop	1	July	3	n
Horsham English Festival	West Sussex	Other	1	May	1	y
Horsham Festival	West Sussex	Mixed	1	May	1	n
Horsham Parkfest	West Sussex	Mixed	1	July	1	y
Horsham Town Centre Festival	West Sussex	Mixed	1	October	3	y
Hungerford and District Community Arts Festivals	West Berkshire	Mixed	1	July	24	n
Hurst Festival	West Sussex	Mixed	1	September	16	n
Indie Guitar Festial 2009	Oxfordshire	Music - Specialist	1	July	3	n
International Ceramics Festival at The Friars	Kent	Visual Arts	1	June	1	y
International Classical Guitar Festival	West Sussex	Music - Specialist	1	November	24	n
Isle of Wight Festival	Isle of Wight	Mixed	1	June	3	n
Isle of Wight International Jazz Festival	Isle of Wight	Music - Jazz	1	April	3	n
Isle of Wight Music Competition Festival	Isle of Wight	Music - Mixed	1	March/April	30	n/a
Jack in the Green	East Sussex	Mixed	1	May	4	y
K2 Urban Youth Festival	Southampton	Mixed	1	August	1	n
Kingsbury Jazz, Oyster and Stout Festival	Buckinghamshire	Music - Jazz	1	September	1	y
Kingston & Richmond Early Music Festival	Surrey	Music - Specialist	1	no info	no info	n
Kingston Carnival	Surrey	Celebrations and Carnival	1	August	1	y
Kingston Readers Festival	Surrey	Literature	1	April/May	30	n
Last Night of the Osborne Proms	Isle of Wight	Music - Classical	1	July	1	n
Leatherhead Christmas Festival	Surrey	Celebrations and Carnival	1	December	1	y
Leith Hill Musical Festival	Surrey	Music - Classical	1	April	3	n
Lewes Bonfire Night Celebrations	East Sussex	Celebrations and Carnival	1	November	1	y
Lewes Guitar Festival	East Sussex	Music - Specialist	1	August	7	n
Lewes Live Literature Festival	East Sussex	Literature	1	April	5	n
Lift Off - Bracknell Forest Dance Festival	Bracknell Forest	Dance	1	March-April	21	n
Light Fantastic	Milton Keynes	Mixed	1	October	1	y
Littlehampton Folk & Roots Festival	West Sussex	Music - Specialist	1	June	3	y
Littlehampton Regatta	West Sussex	Other	1	no info	no info	y
Loop Brighton	Brighton & Hove	Mixed	1	July	3	n
Lounge on the Farm 2009	Kent	Music - Mixed	1	July	3	n

Appendix Three cont….

Festival Name	Local Authority	Artform	Frequency	Month	Duration	Free
Maidenhead Festival	Berkshire	Mixed	1	Oct/Nov	11	n
Maidstone Mela	Kent	Celebrations and Carnival	1	September	1	y
Margate Jazz Festival	Kent	Music - Jazz	1	July	3	n
MayFest	Hampshire	Mixed	1	May	2	n
Mayfield Festival	East Sussex	Music - Mixed	1	April/May	16	n
Meadowlands 2009	East Sussex	Music - Pop	1	May	3	n
Medieval Fair	East Sussex	Mixed	1	May	1	n
Mid Sussex Competitive Music Festival	East Sussex	Music - Mixed	1	November	1	y
Midsummer Jazz & Steam	Isle of Wight	Music - Jazz	1	June	1	n
Midsummer Opera	Isle of Wight	Music - Specialist	1	June	1	n
Milland Music Festival	West Sussex	Music - Mixed	1	June	3	n
Milton Keynes Festival of the Arts	Milton Keynes	Mixed	1	March	2	n
Milton Keynes Science Festival	Milton Keynes	Other	1	Octoner	14	n
MK4U	Milton Keynes	Mixed	1	July	2	y
mOARE Music Festival 2009	Kent	Music - Mixed	1	August	2	n
Multiplay M Festival	Southampton	Other	1	April	4	n
Music and Beer Festival	Kent	Mixed	1	September	1	n
Newbury Comedy Festival	West Berkshire	Performing Arts	1	July	14	n
Newbury Spring Festival	West Berkshire	Music - Mixed	1	May	15	n
Newport Main Carnival	Isle of Wight	Celebrations and Carnival	1	July	1	y
One Love Festival	East Sussex	Music - Specialist	1	August	3	n
Oska Film Festival	Brighton & Hove	Film	1	November	2	n
Out of the Ordinary (OOTO) Festival	East Sussex	Mixed	1	Sep	3	n
Out to Graze Festival 2009	Oxfordshire	Music - Contemporary	1	June	2	n
OxDox International Documentary Film Festival	Oxfordshire	Film	1	April	9	n
Oxdox:MK	Oxfordshire	Film	0.5		19	n
Oxford Balloon Fiesta	Oxfordshire	Other	1	May	2	n
Oxford Brookes University Annual Film and Music Festival	Oxfordshire	Mixed	1	February-March	9	n
Oxford Chamber Music Festival	Oxfordshire	Music - Specialist	1	October	4	n
Oxford Early Music by Candlelight	Oxfordshire	Music - Specialist	1	July/August	43	n
Oxford Folk Festival	Oxfordshire	Music - Specialist	1	March	3	n
Oxford International Womens Festival	Oxfordshire	Mixed	1	Feb-March	17	n
Oxford Jazz Festival	Oxfordshire	Music - Jazz	1	April	4	n
Oxford Lieder Festival	Oxfordshire	Music - Specialist	1	October	14	n
Oxford Literary Festival	Oxfordshire	Literature	1	April	1	n
Oxford May Music	Oxfordshire	Music - Classical	1	April-May	6	n
Oxford Philomusica International Piano Festival	Oxfordshire	Music - Specialist	1	July	7	n
Oxfringe	Oxfordshire	Mixed	1	April	13	n
Paramount Comedy Festival	Brighton & Hove	Performing Arts	1	October	17	n
Parklife	Kent	Mixed	1	August	1	y
Petersfield Musical Festival	Hampshire	Literature	1	March	8	n
Petworth Festival	West Sussex	Music - Classical	1	July/August	15	n
Photofringe	Brighton & Hove	Visual Arts	0.5	Oct/ Nov	42	y
Plaxtol Music Festival	Kent	Music - Mixed	1	September	no info	n
Pointy Field Faust Fest 2009	Hampshire	Mixed	1	September	2	n
Polesden Lacey Shakespeare	Surrey	Performing Arts	1	July	1	n
Portsmouth Festivities	Portsmouth	Mixed	1	June	9	n
Portsmouth Film Festival	Portsmouth	Film	1	September	3	n
Portsmouth Music Festival	Portsmouth	Mixed	1	Feb - March	45	n
Pottery Festival	Buckinghamshire	Other	1	April-May		n
Pride	Brighton & Hove	Celebrations and Carnival	1	August	7	n
Proms in the Park	Kent	Music - Classical	1	June/July	15	n
Quex Fest	Kent	Music - Mixed	1	August	2	n
Reach Dance	Surrey	Dance	1	April	2	no info
Reading Comedy Festival	Reading	Performing Arts	1	October	16	n
Reading Festival	Reading	Music - Pop	1	August	3	n
Red List Live 2009	Kent	Music - Pop	1	June	3	n
Redfest 2009	Surrey	Music - Pop	1	July	2	n
Refugee Week	Brighton & Hove	Mixed	1	June	7	y
Ringwood Carnival	Hampshire	Celebrations and Carnival	1	Sep	1	y
Ringwood Festival	Hampshire	Mixed	1	July	1	y
Rochester Bonfire Night	Medway Towns	Celebrations and Carnival	1	November	1	y
Rochester Sweeps Festival	Medway Towns	Mixed	1	May	3	n
Romsey Arts Festival	Kent	Mixed	1	July	15	n
Romsey Beggars Fair	Kent	Mixed	1	July	2	y
Roots Around the World	West Sussex	Music - Specialist	1	March	no info	n
Runnymede International Literary Festival	Surrey	Literature	1	March	3	n
Runnymede Youth Festival	Surrey	Mixed	1	September	1	y
Ryde Arts Festival	Isle of Wight	Mixed	1	July	8	n
Ryde Carnival	Isle of Wight	Celebrations and Carnival	1	Aug	3	y
Rye Arts Festival	East Sussex	Mixed	1	September	15	n
Sandown Carnival	Isle of Wight	Celebrations and Carnival	1	July/Aug	3	n
See - Brighton Documentary Film Festival	Brighton & Hove	Film	1	Feb	2	n
Sellindge Music Festival 2009	Kent	Music - Mixed	1	June	3	n
Selsey Festival	West Sussex	Mixed	1	August	21	n
Sevenoaks Summer Festival	Kent	Music - Mixed	1	June/July	15	n
Shanklin Illuminated Carnival	Isle of Wight	Celebrations and Carnival	1	August	2	y
Shipley Arts Festival	West Sussex	Mixed	1	July	1	n
Slough Arts Festival	Slough	Mixed	1	march/april/may	10	n
Slough Mela	Slough	Celebrations and Carnival	1	August	1	n
Sounds New Festival	Kent	Music - Contemporary	1	April	10	n
Soundwaves Festival	Brighton & Hove	Mixed	1	July	3	n
Southampton Digital Art Festival	Southampton	Other	1	no info	no info	n
Southampton Festival of Music and Drama	Hampshire	Mixed	1	no info	no info	n
Southampton Film Festival	Southampton	Film	1	June	1	n
Southampton Mela	Southampton	Celebrations and Carnival	1	August	1	y
Southsea Fest 09	Portsmouth	Mixed	1	September	1	n
Southsea Folk & Roots Festival	Hampshire	Music - Specialist	1	August	3	n
SPACE	West Sussex	Other	no info	no info	no info	y
Spelthorne and Runneymede Drama Festival	Kent	Performing Arts	1	Octrober	5	n
Springboard Festival	Brighton & Hove	Mixed	1	March/April	20	n

Festival Name	Local Authority	Artform	Frequency	Month	Duration	Free
St Helens Main Carnival	Isle of Wight	Celebrations and Carnival	1	July	1	y
Steyning Festival	West Sussex	Mixed	1	May - June	14	n
Stoke Goldington Steam Rally	Surrey	Other	1	May	2	n
Stokes Bay Festival 2009	Hampshire	Music - Mixed	1	July-August	4	n
StonyLive!2009	Milton Keynes	Mixed	1	June	9	n
StonyWords! 5	Milton Keynes	Literature	1	January	10	n
Story Telling Festival	Isle of Wight	Mixed	1	May	4	n
Stour Music	West Sussex	Music - Specialist	1	June/July	17	n
Surrey's Amateur Film and Video Festival	Surrey	Film	1	January	1	n
Sutton Film Festival	Surrey	Film	1	October	1	n
Tenterden Folk Festival 2009	Kent	Music - Specialist	1	October	3	n
Thatcham Festival of Arts & Leisure	West Berkshire	Mixed	1	Octobeer	8	n
The Celebrate Festival	Surrey	Performing Arts	1	February-March	2	n
The Coalition Festival 2009	Hampshire	Mixed	1	July	1	n
The Company Presents	Surrey	Music - Mixed	no info	no info available	no info	n
The Firegathering Festival 2009	Brighton & Hove	Mixed	1	May	3	n
The Great Escape	Brighton & Hove	Music - Mixed	1	May	3	n
The Roald Dahl Festival	Buckinghamshire	Literature	1	July	1	y
The White Horse Folk Festival	Oxfordshire	Music - Specialist	1	August	1	n
Thomas Paine, Revolution and Reason (Lewes)	East Sussex	Literature	1	July	10	n
Thornton Heath Festival	Surrey	Celebrations and Carnival	1	September	1	y
Tilford Bach Festival	Surrey	Music - Classical	1	May/June	4	n
TOGFEST	Milton Keynes	Music - Mixed	1	June	2	n
Towersey Village Festival 2009	Oxfordshire	Mixed	1	August	5	n
Truck Festival	Oxfordshire	Music - Specialist	1	July	2	n
ts.com	Oxfordshire	Other	no info	no info	no info	no info
Uckfield Carnival	East Sussex	Celebrations and Carnival	1	Sep	1	y
Under Siege	Medway Towns	Other	1	JULY	1	no info
Under the Oak 2009	Oxfordshire	Music - Specialist	1	September	2	n
unravel - festival of knitting	Surrey	Other	1	February	1	n
Ventnor Carnival	Isle of Wight	Celebrations and Carnival	1	August	1	y
Waddesdon Manor Arts Festival	Oxfordshire	Music - Classical	1	June	2	n
Warborough and Shillingford Festival	Oxfordshire	Mixed	1	July	4	y
Waterside Arts Festival	Hampshire	Mixed	1	July	14	n
West Wycombe LIVE!	Buckinghamshire	Music - Mixed	1	June	2	n
Weyfest 2009	Surrey	Music - Mixed	1	September	2	n
Whitstable Oyster Festival	Kent	Mixed	1	July	9	n
Will Adams - Japanese Festival	Medway Towns	Mixed	1	July	1	n
Winchester & County Music Festival	Hampshire	Music - Classical	1	May	2	n
Winchester Festival	Hampshire	Mixed	1	July	10	n
Winchester Hat Fair	Hampshire	Literature	1	July	4	y
Winchester Writers Conference	Hampshire	Literature	1	July	3	n
Windsor Festival	Windsor and Maidenhead	Mixed	1	March	4	n
Windsor Fringe	Windsor and Maidenhead	Mixed	1	September-October	17	n
Winter Pride	Brighton & Hove	Celebrations and Carnival	1	March	7	y
Wisley Music Festival 2009	Surrey	Music - Mixed	1	June	3	n
Wittfest Charity Music Festival 2009	Oxfordshire	Music - Mixed	1	July	3	y
Woking Dance Festival	Surrey	Dance	0.5	Feb/March	no info	n
Woking Drama Festival	Surrey	Performing Arts	1	October	9	n
Woking Music Festival	Surrey	Music - Mixed	1	November	10	n
Wolverton Lantern Parade	Milton Keynes	Celebrations and Carnival	1	December	1	y
Wooburn Festival	Buckinghamshire	Mixed	1	September-October	32	n
Woodland Wonders	Surrey	Other	1	May	2	n
Woolfire Festival 2009	Hampshire	Music - Mixed	1	August	3	n
World Sacred Music Festival	Brighton & Hove	Music - Specialist	1	October	7	n
Wycombe Arts Festival	Buckinghamshire	Mixed	1	May	7	n
Yarmouth Old Gaffers Festival	Isle of Wight	Mixed	1	May	3	y

Appendix Four – South East Festival Survey Responses

Festival Name	Free	2008 total visitor attendance (ACTUAL)	2008 turnover (ACTUAL)	2008 expenditure (ACTUAL)	How would you describe your festival? A. Major national event B. Major regional event C. A county-wide event D. A place-specific event	How many jobs does the festival typically create in relation to…. Perm Positions	Temp Positions	Vol Positions	Average wage (or employer cost) for permanent and temporary posts?	Full time equivalent	What is the total level of financial support: A. Grant funding B. Business / private sponsorship C. Other financial support — Grant Funding	Bus/Pri Sponsor	Other	Indicate the likelihood of your festival experiencing each scenario as a result of the current recession (1 - Very High 2 = High 3 = Average 4 = Low 5 = Very Low) — Job Cuts	Reduced Fin	Red Vis Num	Red Vis Spend	Inc Costs	Inc Comp	Red in Size	Amalg with Others	Indicate the impact that each scenario would have on your ability to deliver your festival. (1 - Very High 2 = High 3 = Average 4 = Low 5 = Very Low) — Job Cuts	Red Finance	Red Vis Num	Red Vis Spend	Inc Costs	Inc Comp	Red in Size	Amalg with Others
Artists Open Houses, Brighton	y	250,000	80,647	81,386	B	3	25	30	Permanent 10 - 15,000 Temporary 2 - 5,000	15,000	0	2,500	£500	5	5	1	3		1	4	2	1	3	3	3	3	2	2	2
Arts Festival Parade	y	25,000		4,570	C		6	15	£175 per day	45,400	5,000	1,000		4	4	3	4	4	4	3	2	4	3	3	3	4		3	
Basingstoke Live Music Festival	n	10,000	0	£40,000	C/D						£0	£0	£0		5	1	4	3	3	3	5	5	5	2	3	4	2	3	3
Beachdown Festival	n	9,200			B	7	300	100	Permanent 20,000 Temp £400 per job	20,000	0	400,000		4	5	3	3	3	5	3	2	4	4	4	5	4	3	4	2
Bentworth Blues Weekend 2009	n	400	6,800	8361.75	C		x		6	11,700	0	o	£0	1		2	2	4	4	3	1			5	2	5	2	4	1
Big Moo - Milton Keynes	n	160,000	80,000	79,000	B	0	5	50	2,500		0	60,000	£20,000	3	4	3	3	3	2	4	3	3	3	4	2	4	4	3	3
Blissfields Festival	n				C		5	er the w	Small profit share if at all		0	0	£0	1		1	2	2	4	2	1	3		4	3	4	4	3	4
Blues on the Farm	n	9,000	350,000	300,000	A	4	40	0	250		0		£0	4	4	3	3	4	3	2	1	3	3	4	3	4	2	2	3
Brighton Festival of Early Music	n	4,162	158,620	135,231	B	1	1	70	10,000	10,000	£50,000	500	£20,000	2	3	3	4	3	2	3	2	2	5	4	2	1	1	2	1
Brighton Fringe	n	100,000	271,000	250,000	B	25			10,000	10,000	25%			3	3	3	3	2	2	3	1	4	4	4	4	3	2	2	5
Brighton Live	n	12,000	13,000	13,000	D		3		£10/hr	19,500	3000	10,000	£10,000																
Broadstairs Folk Week	n	120,000	230,000	226,851	A	3		170	Part-time = £35,000	35000	B (inc ACE fu	36091	148000	3	5	2	3	4	4	3	1	5	5	4		5	4	4	5
Butserfest 2009	n	1,500	26,000	51,500	C	100	40	0			30,000	15,000		1	2		2	3	2	1	1	3	5	4	3	3	2	3	1
Canterbury Festival	n	73,000	831,542	837,140	A	6	4	40	25,000	25,000	221,000	150,000	£60,000	1	5	3	4	4	3	2	1	5	5	4	4	4	2	3	2
Castle Fields Festival	y	11,000		7,500	C	2	23	16	£11.75/hr	22,913	3000	2,000	£2,500	1	4	1	3	2	2	1	1	1	5	1	4	3	2	1	1
Caterham Festival	n				D	0	0	60			3,000	3,000	£0		5	2	4	4	1	1	4	1		3	4	4	4	5	2
Chichester Festivities	n	55,794	504,730	561,298	B/C	3	20	70	Perm 21,139 Temp 1,436	21,139	19,200	61,000	£47,443	2	4	3	4	2	3	3		2	4	4	4	3	3	3	1
Chichester Film Festival	n	4,000	50,000	50,000	B	12	3	60	16,000	16,000	11,000	3,000		1	4	3	3	3	3	2	3		5	4	3	4	3	2	2
Chobham Festival	n	2,000		20,000	C			20				3,000																	
CineCity	n	13,022		122,067	B		2								4							5	4	3	3	3	2	4	
Crawley Folk Festival	y	4,000	36,000	45,000	B	0	8	6	£100 per day	26,000				3	4	3	4	3	3	4	2	5	5	4	4	4	3	5	1
Cropredy	n	16,000									0	0	£0																
Dragon Boat Festival	y	14,000	48,000	39,750	C		30		£100 per day	26,000	0	10,000	£33,000	1	3	2	3	2	2	2	1	1	5	2	2	3	1	3	1
Durrington Festival	y	8,000		3,500	D	0	0	15	0		0	2,550	£2,000				3	5	2	4	1		5	4	4	5	2	5	1
Eastbourne Festival	n				C	3	0	3	n/a		0	5,000		1	1	1	1	3	1	1	1	1	3	3	3	3	3	3	3
End of the Pier Film Festival	n	4,000	25,000	28,000	A	3	6	12	30,000/15,000	30000	15,000	10,000	55000	5	5	5	5	5	2	4	1	5	5	5	4	4	1	4	1
Faversham Carnival	y	10,000	8,000	10,000	C	0	0	15			3,500	4000	£2,500																
Faversham International Hop Festival	n	25,000	29000	29,400	B	0.25	1	50	Temporary £1200		13,000	5,000		4	1	5	1	1	2	3	3	1	1	1	3	1	2	2	3
Garsington Opera	n	10,871	2,317,359	2,202,455	B		200				0	172,500	£66,000	3	5	5	5	5	3	2	1	5	5	5	5	5	3	4	1
Godalming Music Festival	n	3,500	20000	18,000	C	0	0	60	0		0	2,000	£0	1	3	2	2	3	3	3	2	1	3	4	4	5	3	3	3
Goodnestone Concert in the Park	n	3,000			C	2	100	0			0	1000	10000	2	2	3	3	5	1	1	1	1	5	5	5	5	5	5	1
Great Linford Waterside Festival	y	5,000	21,000	20,000	D		12	100			200	500		1	4	3	3	4	2	3	1	4	4	5	5	4	4	4	3
Guildford Book Festival	n	8,000			B						48,040	13,000		3	5	3	3	4	2	5	1	4	4	4	3	5	3	4	
Guildford International Music Festival	n	14,000	45000	80,000	B	0	1	20	£150 per day	39,000	4,000 - 40,00	350	£12,000	3	5	3	3	5	5	4	1	5	5	5	5	5	4	4	4
Hastings Bonfire Celebrations	y	20,000	12,000	12,500	B	0	0	40	0		6,000	1,000	£300	2	4	3	4	4	2	3	1	2	4	2	2	4	2	4	2
Hobble on the Cobbles	n	5,000	30,000	28,000	C						10,000	15,000	£5,000	2	5	3	4	1	3	4	4	2	5	4	3	5	3	4	4
Horesham Town Festival	y	10,000	2,800	20,820	C	2	2		Permanent = 24,000 Temp = £30K Casual = £7ph	24000	0	2,800	£20,820	3	4	1	4	3	1	4	1	5	4	3	4	5	3	5	3
Horsham English Festival	y	5,000		3,000	C	0.5		1	25,000	25,000	0	2,000	£3,000	3	5	2	3	3	2	1	3	5	5	4	4	3	2	3	1
Horsham English Festival	y	5,000		3,000	C	0.5	0	1	25,000	25,000	0	2000	£3,000	3	5	2	3	3	2	1	3	5	5	4	4	3	2	3	1
Indie Guitar Festival	n				C		10	160	250						1	2	2	4	3	2	1	1	1	4	2	4	2	5	5
John Azah (Kingston Carnival)	y	22,000	15,000	25,000	B		1	35	3,000		3000	8,000	£12,000																
K2 Urban Youth Festival	n	41,000		50,000	D		16	65	100		19,500	500	30000	5	4	2	2	3	2	4	3	4	4	3	2	4	2	5	3
Leith Hill Musical Festival	n	4,000	70,000	70,000	C	3	0	50			0	2,000	15000	1	5	5	4	4	1	3	1	5	4	4	4	4	2	3	5
Littlehampton Folk and Roots	y	1,000		3,000	C									2	3	2	3	3	2	2	2	4	3	4	3	3	3	3	3
Littlehampton Regatta	y	5,000	3000	7,000	C		20	20	£50 per day	13,000		1000	£7,000	2	3	2	3	3	2	2	2	4	3	4	3	3	3	3	3
Littlehampton Wick Week	n	3,500		10,000	D									2	3	2	3	3	2	2	2	4	3	4	3	3	3	3	3
Loop Brighton	n	4,000	130,000	200,000	B		x		£150 per day	13,000	33,000	7,500		4	4	3	3	2	3	2	2	3	5	5	3	4	4	3	3
Lounge on the Farm	n	4,900	230000	300,000	B	10	50	200	£10/hour	19,500	0	10,000	£0	2	5	3	3	4	4	2	1	5	3	5	4	3	3	2	3
Margate Big Sky Jazz Festival	n	6,000		16,000	B	1	1	16	30,000	30,000	8,000	2,000	£6,000	4	5	2	3	3	4	4	2	3	4	3	4	3	4	4	2
Marios Carboni (Plaxtol Music Festival)	n	700	5,000	10,000	C				voluntary		0	1,000																	
Martin Thompson	y		8,856	4,500	C						1,450	1,189	£1,800																
Max Mason (Oxford Jazz Festival)	n	2,500	8,000	14,000	A	0	4	25	0		0	0	£14,200																
Milland Music Festival	n	N/A	N/A	N/A	D	0	0	3	N/A		500	0	£0			3				3			3	3		3			
Milton Keynes Festival of the Arts	n	500	8,000	5,000	C			30	N/A		0	500		1	1	1	1	5	1	1	1	1	1	5	5	5	1	5	1
MK4U	y	4,000	16,000	16,000	D			60	N/A		10,000	4,000			5	2	3	1	3	5	2		5	2	2	5	3	5	3
MOARE Music Festival	n	600			D	0	15	10	£144 pp		0	0	£0	1	N/A	1	5	1	1	1	1	1		5	2	5	2	2	1
Multiplay Festival	n	12,000	1,000,000	434,000	A	25	5	150	20,000	20,000		450,000		2		4	3	3	3	3	4	3		2	2	2	2	2	3
Music and Beer Festival	n	480	£5,000	£3,500	C			x	0		£0	£0	£0	1	1	3	3	4	3	1	1		1	1	1	1	1	1	1
Newbury Spring Festival	n	21,000	478,000	446,000	C		20	12	£300 per week	15,600	113,000	82,000	£15,000	1	4	3	3	3	3	4	1	4	5	4	3	4	2	4	5
Oska Bright Film Festival	n	5,156	75,000	75,000	A	2	9	30	25 - 30,000	30,000	55,000	20,000		4	4	3	3	3	1	4	1	5	5	3	3	5	2	4	5
Oxford Folk Festival	n	2,000	63,509	64,366	B			150	In kind £55		Varies 1,600 - 2	2,900		1	5	2	2	2	3	2	1	2	5	5	5	5	5	3	3
Oxford Literary Festival	n	32,000	300,000	500,000	A	2	20	120	N/A		70,000	150,000		2	2	2	3	4	2	2	1								
Oxford May Music	n	1,000	7,000	15,900	B		2	5	1,000		350	200	£680	2	5	3	2	1	2	2	1	2	5	4	2	3	2	3	2
Petworth Festival	n	5,405	134,000	144,000	B	2		15			7,000	36,000	£22,000	2	3	3	4	4	3	3	5	5	5	5	5	5	5	5	5
Portsmouth Festivities	n	12,000	62,582	66,015	C	1		20				45,000		2	4	3	4	3	2	2	1	5	5	4	2	3	2	3	
Portsmouth Film Festival	n	1,798	20,000	18,000	C	0	10	25	£12.50/hr	24,375	6000	4,000	£1,000	2	4	1	3	2	2	1	1	2	4	1	4	3	2	1	1
Portsmouth Music Festival	n	2,500	26,000	22,000	C	0	0	15	N/A			3,500												5					
Pride in Brighton & Hove	y	120,000			ABCD	3		200			25,000																		
Redfest	n	1,300	16,000	50,000	B		30	20	£10 per hour	19,500				1	5	1	1	3	2	1	1	1	5	5	3	5	3	3	2
Ringwood Carnival	y	15,000	20,000	15,000	C							6,000			5	2	3	3	2	3	1		3	4	4	3	2	4	4
Rochester Sweeps Festival	n	40,000	13,000	76,000	A/B	1	20	0	£8 per hour	15,600				1	1	1	2	2	3	1	1	5	5	3	2	4	2	4	5
Romsey Beggars Fair	y	3,000	5,087	5,483	C			8			2000	500		1	4	2	3	3	1	1	1		3	4	3	4	1	3	
Rox	y	15,000		50,000																									
Runnymede International Literary Festival	n	660	25,000	25,000	C		14		£50 per workshop		25,000	300																	
Selsey Festival	n	5,000	16,810	12,446	D			7			2000	1000		1	5	3	3	5	2	3	1	1	5	5	5	5	3	4	1
Shipley Arts Festival	n	8,000	50,000	50,000	A/C	1	40	10			5000	2000	£2,000	5	4	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Sian Thomas (Winchester Hat Fair)	y	30,000	228,000	245,000	A	3	6	40	£150-210/day	54,600	130,000	15,000	£66,000																
SPACE	y	1,100		7500	D									2	3	2	3	3	2	2	2	4	3	4	3	3	3	3	3
Steyning Festival	n	7,000	22,000	22,000	C	1	5	60	Perm = 12,000 Temp = £10 ph	12,000	5 - 10,000	5,000		2	5	4	4	3	3	4	2	4	5	5	5	5	5	5	2
StonyLive!	n	1,500	4,100	3,100	D						500	930		2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Story Telling Festival	n	832	9,000	9,000	C		20	10			9,000	0	£0		4	4	4	3	2	4	4	4	4	4	4	4	4	3	2
Stour Festival	n	3,500	82,824	82,824	A	1		60	13,500	13,500		12000	£15,000	1	3	1	1	1	1	2	1	1	2	2	2	2	2	2	1
Tenterden Folk Festival	n	3,000	16,700	16,400	A			50			6000	2000	£250		4	3	3	4	2	2	1		4	3	3	4	2	3	1
Thomas Paine Revolution and Reason	n		30,000	30,000	A		5		£30,000 pro rata	30,000	5,000	1,500	£30,000	4	5	1	1	1	1	2	1	2	2	1	1	3	1	1	1
Towersey Village Festival	n	9,750	371,000	368,000	A	2	10	260	20,000	20,000	3,000	5,000		3	4	4	4	3	2	2	1	2	2	2	2	2	2	2	1
Warborough and Shillingford Festival	y	1,000	14,000	13,000	D			15	0		0		£6,000	1	5	2	3	5	2	2	1	1	5	4	4	5	1	3	1
West Blecthley Carnival	y	15,000	30,000	30,000	D										4	2	2	3	1	2	2	2	2	4	4	4	4	4	
Whitstable Oyster Festival	n	75,000		53,000	B		1	12			16,000	7,000	£30,000	1	5	2	4	3	2	4	1		4	3	2	4	2	4	5
Winchester and County Music Festival	n	1,000	18,462	16,821	C		58		5,800 for 58 people		0	1250	£150	2	4	4	3	5	4	2	1	2	3	3	3	4	4	3	1
Windsor Festival	n	45,000	420,000	415,000	B	2	10	160	20,000	20,000	65,000	215,000	£60,000	1	4	2	2	3	2	3	2	1	4	2	2	3	2	3	2
Winterlight	y	12,000	73,650	96,252	C						70,000	4000	£11,000							5									
Yarmouth Old Gaffers Festival	y	15,000	60,000	62,000	C			30	N/A		7,000	0	£0	2	5	3	3	5	1	4	2	1	5	5	5	5	1	3	4