

**BURNS FESTIVAL
MAY 2003
IMPACT ASSESSMENT**

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Abbreviations

AATB	-	Ayrshire & Arran Tourist Board
AATIF	-	Ayrshire and Arran Tourism Industry Forum
BNHP	-	Burns National Heritage Park
MC	-	Moffat Centre
SAC	-	South Ayrshire Council
SEA	-	Scottish Enterprise Ayrshire
VS	-	VisitScotland

1.0 EXECUTIVE SUMMARY

This report analyses the Burns and a' that festival 3-11 May 2003. Funded primarily by the public sector for its second year of operation.

The festival resulted in:

- Approximately 48,000 people attending events, both paid and free events across the duration of the festival 3-11 May (9 days)
- over £2 million of advertising equivalence press coverage
- local direct expenditure of £950,000

The festival utilised Burns and his work as a thematic 'pull' factor to celebrate Scottish creativity and the arts. The second festival was considerably more ambitious in length and content. On this occasion it incorporated existing events (such as the Ayr Agricultural Show and Girvan Folk Festival) as well as incorporating new (if not closely related) events such as the Ayr (Burns) Film and TV Festival and the now well developed Fringe elements. The festival is now of 9 days duration and has events/venues in various locations including: Mauchline, Kilmarnock, Ayr, and Turnberry.

The outcomes in terms of: expenditure, publicity and destination awareness building was good. However to see real economic impact at a local level and to continue to develop the brand identity of the location, commitment to future funding by the public sector will be vital.

2.0 PROJECT AIMS

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| <ul style="list-style-type: none">• To assess the economic impact of the Burns and a' that – 3-11 May 2003 (utilising quantitative and qualitative data)• To provide a framework for impact assessment that is replicable in future years. |
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The reportage will also examine the above in the context of the festival objectives which are detailed below:

- Raise awareness of Robert Burns and contemporary Scottish culture
- Raise awareness of Ayrshire and Scotland
- Generate additional bed-nights in Ayrshire
- Derive economic benefit from the event
- Provide a positive platform for the attraction of private sponsorship in future years.

Where appropriate comparisons are made between 2002 and 2003 festivals.

3.0 METHODOLOGY

The approach adopted was utilised in the first examination of the 2002 Burns Festival and has allowed for comparison and review of growth and development.

The analysis undertaken for 2003 (like that undertaken for 2002) focussed on economic and social impact of the festival as recorded/experienced by:

- the tourism industry
- local residents
- visitors.

The investigative tools used over both 2002 and 2003 were:

- intercept survey (visitors/festival users)
- qualitative analysis
- advertising equivalence evaluation
- transport utilisation
- visitation analysis
- sponsorship analysis
- public sector support analysis
- industry evaluation (via liaison with key organisations such as AATIF, AATB, etc)

The Moffat Centre anticipated three major elements to this project. These are detailed below:

Stage I

Agreement of research tools/methods, liaison with key stakeholders, replicate previous methodology to allow for year on year comparison.

Date: 10-18 April 2003

Stage II

Collection of data (via a range of methods)

Date: 3-11 May 2003

Stage III

Analysis and report preparation

Date: 2-24 June 2003

3.1 DEVELOPMENT OF EVALUATION

At commencement of the project a clear research study timetable was developed (detailed as below)

Method and Dates	Location
Intercept 8-11 May	Alloway/Brig O Doon/Kilmarnock
Intercept 3 May	Mauchline Town Centre
Intercept 8-11 May	Fringe Events, Alloway, Wellington Square, Ayr, Low Green
Intercept 10-11 May	Wellington Square, Ayr, Low Green
Intercept 9 May	Culzean Castle
Advertising Monitoring	MC based liaison VS, AATB, SEA
Transport Utilisation	MC based - liaison rail, taxi, bus, air
Total Visitation	MC based – liaison with Unique Events
Sponsorship Analysis	MC based – liaison with Unique Events
Public Sector Analysis	MC based

Festival based evaluation is detailed by date, time and major event/location below:

Saturday 3 May	Sunday 4 May	Monday 5 May	Tuesday 6 May	Wednesday 7 May	Thursday 8 May	Friday 9 May	Saturday 10 May	Sunday 11 May
Mauchline Town Centre 11.00–4.00pm						Culzean 5.00–8.00pm	Wellington Sq 1.00-6.00pm	Low Green Irvine Alloway 1.00-6.00pm
					Ayr/Alloway 5.00-8.00pm	Ayr/Alloway 5.00-8.00pm	Ayr/Alloway 8.30–9.30pm	
					Kilmarnock 5.00-8.00pm	Kilmarnock 6.00-8.00pm	Ayr High St Low Green Kilmarnock 1.00–8.00pm	Ayr High St Low Green 1.00–8.00pm

3.2 METHODOLOGICAL LIMITATIONS

The economic impact evaluation was governed by the requirements of a small steering group. Data on the festival and its economic impact was derived from a variety of sources. This included ; the Area Tourist Board, VisitScotland, the Unique Events company, industry, booking offices and via the primary evaluative research.

Intercept Survey

Random intercept surveys were undertaken at a range of events from the main festival and the Fringe. Invariably it was difficult to identify visitors and viewers at each performance since many would attend a range of events. Key intercepts survey points occurred at the following major locations:

- Saturday 3 May – Holy Fair, Mauchline
Burns by Bike, Mauchline

- Thursday 4 May - Festival Club, Ayr
Low Green Funfair, Ayr
Tam O' Shanter, Kilmarnock
Poets and Pints, Kilmarnock
Houghmagandie Pack, Burns Cottage, Alloway

- Friday 5 May - Gala Concert, Culzean Castle
Festival Club, Ayr
Festival Fair Ground, Ayr

- Saturday 6 May - Festival Club, Ayr
Fresh Ayr / Festival Fair Ground, Ayr
International Street Theatre, Kilmarnock
Burns and His Times, Rozelle House Galleries, Ayr
Goudie Collection IV, Rozelle House Galleries, Ayr
Houghmagandie Pack, Burns Cottage, Alloway

- Sunday 7 May - Festival Club, Ayr
Fresh Ayr / Festival Fair Ground, Ayr
Mightier than the Sword, Irvine Burns Club, Irvine
Goudie Collection IV, Rozelle House Galleries, Ayr
Houghmagandie Pack, Burns Cottage, Alloway

In crowd events every third party was intercepted although in some smaller events (eg Fringe) samples of audience attendance was significantly larger.

Once again completion rates of the full survey were low (e.g. in relation to expenditure) as a direct consequence of the high number of local festival users and the limited amount of visitors.

4.0 INTERCEPT SURVEY RESULTS

4.1 DATE OF INTERVIEWS

Date	Number of interviews	Percentage
3 May	39	18%
8 May	40	17%
9 May	58	29%
10 May	45	21%
11 May	33	15%
Totals	215	100%

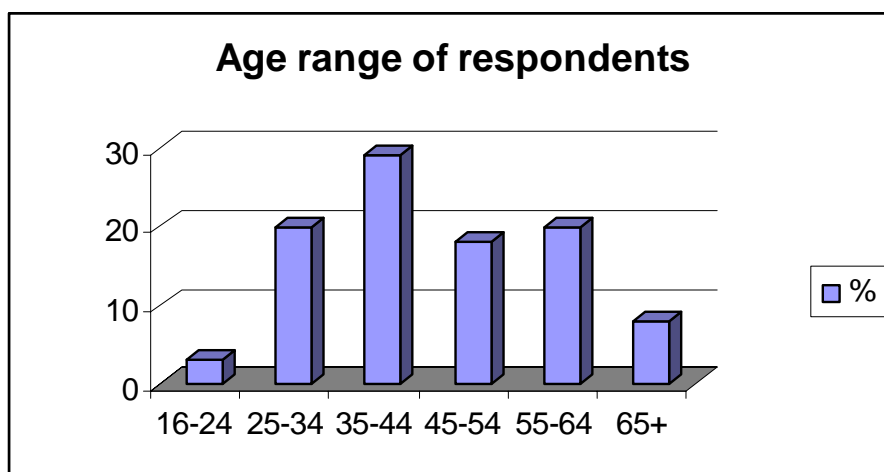
The highest number of responses was received during Friday 3rd June which accounts for 29% of the total, when interviews were conducted.

4.2 GENDER PROFILE OF RESPONDENTS

Of the 213 responses (99% of total respondents) received for this question, 114 were female (53%) and 99 male (47%).

4.3 AGE RANGE OF RESPONDENTS

There were 210 responses to this question (98% of all respondents) and the breakdown into the various age categories is as follows:



4.4 RESPONDENTS PLACE OF RESIDENCE (2002-3)

The following table compares origins of respondents across both festivals (2002 and 2003).

Source of Visitors	2002	2003
Ayr	32%	26%
Ayrshire	31%	42%
Scotland (rest of)	24%	23%
England	7%	5%
Northern Ireland	2%	2%
Overseas	2%	2%
Unknown/missing	2%	2%

The festival remains a predominantly Ayrshire/Scottish event with the majority of sample interviewed originating in Ayrshire and/or Ayr. The increase in local usage and attendance is a result of the increase in positive word of mouth recommendations for the festival at a local level. This would appear to be indicative of a greater local awareness, improved local marketing and the benefits of building on an annual event.

4.5 METHOD OF TRAVEL TO AYR

There were 212 responses to this question which represents 99% of the total respondents. Some respondents answered with more than one method of transport. For example, those travelling by air may have selected 'by air' and 'hire car' in their response.

Mode of Transport	%
Private car	70%
Hire car	6%
Air	6%
Train	4%
Coach	4%
Other	11%

Car remains the most important transport medium. Airlines used were predominantly budget carriers: Ryanair and Easyjet.

4.6 HOW MANY IN THE TRAVELLING PARTY

A total of 200 people provided details of travel party composition. The average party size was two and detail for each night is included below.

Composition of party	3 May	8 May	9 May	10 May	11 May	Total
alone	8%	3%	11%	11%	7%	8%
couple	23%	38%	46%	29%	37%	36%
couple + children	10%	3%	5%	34%	33%	15%
couple + children + friends				3%		1%
couple + children + relatives				3%		1%
couple + friends		10%	9%	3%	3%	6%
couple + relatives	5%	5%	2%			3%
couple + relatives + friends		3%		3%		1%
friends	23%	21%	18%	9%	17%	18%
friends + children	8%					2%
other	8%				3%	2%
relatives	13%	13%	9%	6%		9%
relatives + children		3%				1%
relatives + friends	3%	3%	2%			2%
total	100%	100%	100%	100%	100%	100%

The event is dominated by couples/husband and wife grouping with friends and couples/children the next most important grouping.

4.7 EVENTS ATTENDED BY RESPONDENTS

Of the 211 responses to this question the following attendance or intention to attend data was produced.

Attendance/ intention	Culzean Castle	Holy Fair	Festival Club	Wellington Sq	Tam O'Shanter	Fringe Events
missing	50%	73%	83%	61%	90%	51%
have done	36%	27%	6%	19%	3%	18%
intend to	13%	0.5%	10%	19%	6%	29%
both	0.5%		0.5%	1%	1%	2%
Total	100%	100%	100%	100%	100%	100%

The popularity of the Culzean Castle Gala Concert and the Holy Fair (which achieved record attendance) are of particular note. This is similar to 2002 in respect of the Gala but the Holy Fair did not achieve such prominence in 2002.

Attendance at events was cross tabulated with age of respondents in order to ascertain any relationship between age and event. The results are detailed below:

Culzean Castle, Gala Concert

Age	have done	intend to	both
missing	4		
16-24	3		
25-34	13	3	
35-44	24	11	
45-54	9	10	
55-64	18	2	1
65+	5	2	

Holy Fair, Mauchline

Age	have done	intend to	both
16-24	1		
25-34	10		
35-44	9	1	
45-54	8		
55-64	15		
65+	13		

Festival Club

Age	have done	intend to	both
missing	1		
16-24	2		
25-34	5	5	
35-44	2	6	
45-54	3	7	
55-64		3	1
65+		1	

Low Green Fresh Ayr

Age	have done	intend to	both
missing	1	2	
16-24	4		
25-34	16	10	
35-44	12	13	
45-54	4	5	1
55-64	3	8	1
65+		3	

Tam O'Shanter (The Arches)

Age	have done	intend to	both
16-24		1	
25-34	3	4	1
35-44		1	1
45-54	1	5	
55-64		1	1
65+	2	1	

Fringe Events

Age	have done	intend to	both
missing	2		
16-24	1	2	
25-34	10	13	1
35-44	14	18	
45-54	4	9	1
55-64	5	14	2
65+	3	5	

This indicates the dominance of the post 35 year age group at the Gala Concert (Culzean) and the Holy Fair (Mauchline).

Attendance at events was also tabulated against place of residence to produce the following indicators.

Culzean Castle, Gala Concert

Place of residence	have done	intend to	both
Ayr	22	5	
Rest of Ayrshire	19	17	
Rest of Scotland	26	4	
N. Ireland	3		
England	6	2	1
Overseas			

Holy Fair, Mauchline

Place of residence	have done	intend to
Ayr	7	
Rest of Ayrshire	36	
Rest of Scotland	10	
N. Ireland	1	
England		1
Overseas	2	

Festival Club

Place of residence	have done	intend to	both
Ayr	2	4	
Rest of Ayrshire	3	7	
Rest of Scotland	4	9	
N. Ireland	2	1	
England	2	1	1
Overseas			

Low Green Fresh Ayr

Place of residence	have done	intend to	both
Ayr	11	10	
Rest of Ayrshire	12	13	
Rest of Scotland	9	14	1
N. Ireland	2		
England	3	4	1
Overseas	3		

Tam O'Shanter (The Arches)

Place of residence	have done	intend to	both
Ayr	1	2	
Rest of Ayrshire		3	1
Rest of Scotland	3	6	1
N. Ireland	1		
England	1	2	1
Overseas			

Fringe Events

Place of residence	have done	intend to	both
Ayr	13	23	2
Rest of Ayrshire	13	24	
Rest of Scotland	9	10	
N. Ireland	2		1
England	2	4	1
Overseas			

Clearly the Gala Concert was the most important event for attracting people from the rest of Scotland whereas the Holy Fair at Mauchline was significant for the rest of Ayrshire.

4.8 ACCOMMODATION UTILISED IN AYR/AYRSHIRE

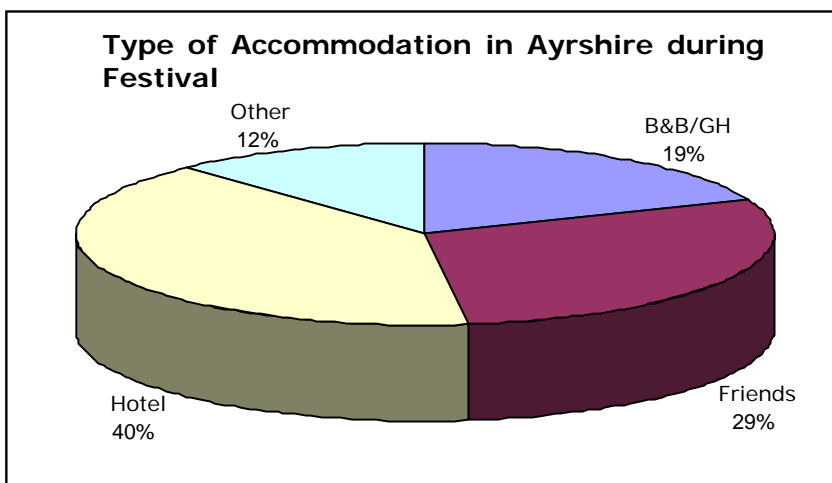
It is important to note that of the 213 respondents interviewed 36 (17%) stayed in Ayr/Ayrshire. This is compared with the previous year's festival accommodation utilisation as shown below.

Number of Nights Spent in Ayrshire

	2002	2003
1 Night	30%	25%
2 Nights	21%	36%
3 Nights	36%	16.6%
4 Nights	9%	11.1%
4 or more Nights	4%	11.1%

Whilst accommodation utilisation is low there is an encouraging growth in 2 night and 4 nights/ 4 nights + stays in 2003. Accordingly a small but reassuring growth in economic impact on accommodation provision (at a local level) is now apparent.

4.8.1 TYPE OF ACCOMMODATION USED IN AYR/AYRSHIRE DURING FESTIVAL



The most popular type of accommodation utilised was 'hotel' which accounted for 40% of customer recorded.

4.9 TOTAL ANTICIPATED EXPENDITURE DURING FESTIVAL

Of the 215 samples some 146 respondents (67.9%) provided spending details.

The table below details overall expenditure by date.

Date of Survey	No. respondents	Admissions	Accomm. During	Accomm. Pre/After	Travel to UK	Travel in UK	Local Travel	Food & Drink	Sightseeing	Shopping & gifts	Other	Total expenditure
3rd May, Saturday	24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£156.00	£0.00	£187.00	£5.00	£348.00
8th May, Thursday	28	£948.00	£510.00	£60.00	£0.00	£200.00	£8.00	£484.00	£17.00	£30.00	£15.00	£2,272.00
9th May, Friday	39	£1,603.50	£318.00	£180.00	£0.00	£80.00	£15.00	£865.00	£17.00	£46.00	£298.00	£3,422.50
10th May, Saturday	24	£220.00	£80.00	£0.00	£40.00	£340.00	£30.00	£365.00	£0.00	£107.50	£50.00	£1,232.50
11th May, Sunday	31	£623.00	£523.00	£110.00	£100.00	£236.00	£29.40	£740.50	£20.00	£170.00	£20.00	£2,571.90
Total	146	£3,394.50	£1,431.00	£350.00	£140.00	£856.00	£82.40	£2,610.50	£54.00	£540.50	£388.00	£9,846.90

Clearly Admissions and Food and Drink dominate categories with Friday, 9th May being the most significant date in terms of expenditure. This coincides with one of the most expensive events – the Culzean Gala Concert.

The next table examines the sales mix by date.

Date of Survey	Admissions	Accomm. During	Accomm. Pre/After	Travel to UK	Travel in UK	Local Travel	Food & Drink	Sightseeing	Shopping & gifts	Other	Total expenditure
3rd May, Saturday	0%	0%	0%	0%	0%	0%	45%	0%	54%	1%	100%
8th May, Thursday	42%	22%	3%	0%	9%	0%	21%	1%	1%	1%	100%
9th May, Friday	47%	9%	5%	0%	2%	0%	25%	0%	1%	9%	100%
10th May, Saturday	18%	6%	0%	3%	28%	2%	30%	0%	9%	4%	100%
11th May, Sunday	24%	20%	4%	4%	9%	1%	29%	1%	7%	1%	100%
Total	34%	15%	4%	1%	9%	1%	27%	1%	5%	4%	100%

This table should be read horizontally and it clearly indicates:

- The significance of Admission and Food and Drink expenditure
- The dominance of Shopping and Gifts expenditure evidencing the importance of retail (particularly at the Holy Fair).

The following table examines average expenditure:

Date of Survey	Admissions	Accomm. During	Accomm. Pre/After	Travel to UK	Travel in UK	Local Travel	Food & Drink	Sightseeing	Shopping & gifts	Other	Total expenditure
3rd May, Saturday	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.50	£0.00	£7.79	£0.21	£14.50
8th May, Thursday	£33.86	£18.21	£2.14	£0.00	£7.14	£0.29	£17.29	£0.61	£1.07	£0.54	£81.14
9th May, Friday	£41.12	£8.15	£4.62	£0.00	£2.05	£0.38	£22.18	£0.44	£1.18	£7.64	£87.76
10th May, Saturday	£9.17	£3.33	£0.00	£1.67	£14.17	£1.25	£15.21	£0.00	£4.48	£2.08	£51.35
11th May, Sunday	£20.10	£16.87	£3.55	£3.23	£7.61	£0.95	£23.89	£0.65	£5.48	£0.65	£82.96
Total	£23.25	£9.80	£2.40	£0.96	£5.86	£0.56	£17.88	£0.37	£3.70	£2.66	£67.44

Expenditure Range 2002 and 2003

Despite differences in sample size the following expenditure range show interesting levels of comparability.

Range of Expenditure	(n = 220) 2002	(n = 209) 2003
£50 or less	62.7%	71.3%
Less than £100	11.3%	17.2%
Less than £200	15.4%	6.2%
Less than £300	3.6%	3.8%
Less than £400	4.0%	0.4%
Less than £500	2.0%	0.4%
£500 and over	1.0%	0.4%

Clearly the expenditure range reinforces the significance of the day/local market with expenditure levels of £50 or less. The non use of major transport or accommodation ensures expenditure remains low with some volume growth in 2003.

The following table indicates expenditure tabulated against place of residence of respondent.

Place of Residence	Admissions	Accomm. During	Accomm. Pre/After	Travel to UK	Travel in UK	Local Travel	Food & Drink	Sightseeing	Shopping & gifts	Other	Total expenditure
Ayr	£28.34	£0.00	£0.00	£0.00	£0.66	£0.00	£7.49	£0.00	£1.92	£0.37	£38.78
Rest of Ayrshire	£18.10	£0.00	£0.00	£0.00	£0.00	£0.47	£11.07	£0.29	£2.35	£2.05	£34.34
Rest of Scotland	£22.04	£19.59	£8.53	£0.00	£3.85	£0.59	£27.91	£0.44	£1.94	£4.26	£89.16
N. Ireland	£37.50	£67.50	£0.00	£25.00	£50.00	£0.00	£62.50	£2.50	£30.00	£0.00	£275.00
England	£39.22	£50.00	£6.67	£0.00	£55.56	£3.33	£46.67	£1.33	£14.44	£12.22	£229.44
Overseas	£5.00	£15.00	£0.00	£13.33	£0.00	£1.67	£21.67	£0.00	£5.00	£0.00	£61.67
Total	£23.25	£9.80	£2.40	£0.96	£5.86	£0.56	£17.88	£0.37	£3.70	£2.66	£67.44

This table clearly indicates the influence of Ayr/Ayrshire residents on the following key areas:

- accommodation
- travel
- sightseeing.

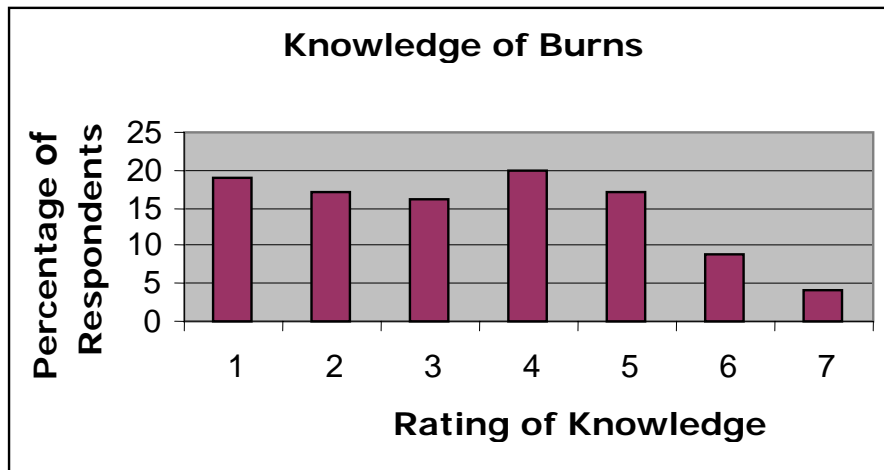
The high local usage negates and reduces expenditure in these critical areas. Admission and food and drink expenditure are least affected by this weighting.

4.10 USE OF CREDIT CARDS

Some 215 individuals responded to this question and 40% had made use of credit cards. The dominant usage was that of Visa, followed by Switch (which is not a credit card).

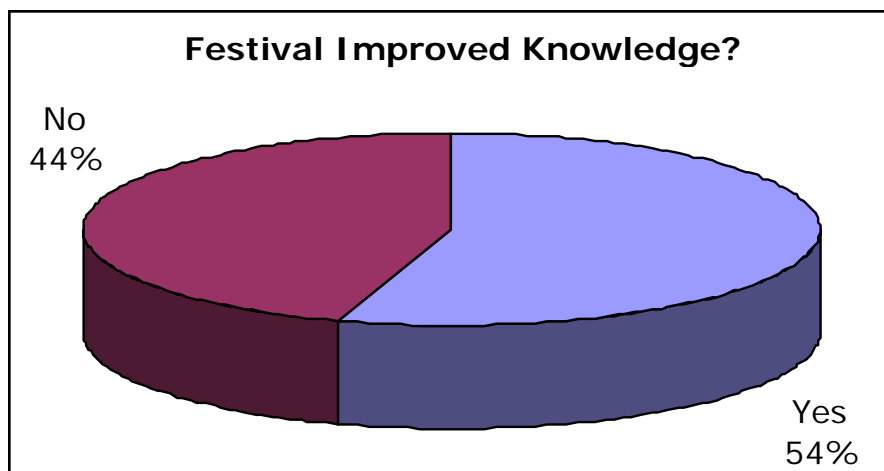
4.11 KNOWLEDGE OF BURNS AND HIS WORK PRIOR TO FESTIVAL

A total of 210 responded to this question which equates to 98% of all respondents. The rating scale is defined as 'Rating 1 = Strong Knowledge' and 'Rating 7 = Weak Knowledge'



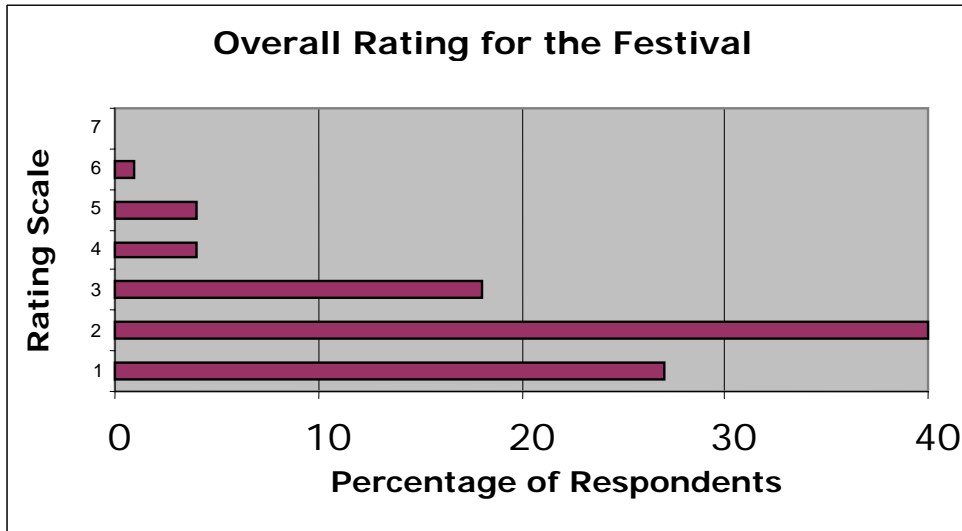
4.11.1 HAS THE FESTIVAL IMPROVED KNOWLEDGE?

All respondents answered this question.



4.12 OVERALL RATING FOR BURNS FESTIVAL

All respondents ensured this. The rating scale is 'Rating 1 = Excellent' and 'Rating 7 = Poor'.

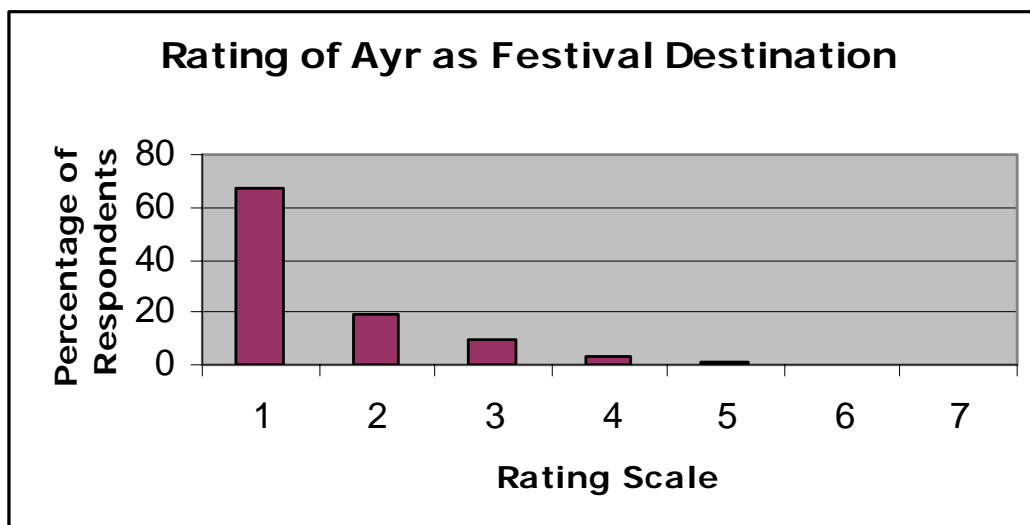


Note Missing: 6%

The overall response is therefore positive as 67% of respondents to this question have rated the festival as either '1' or '2'.

4.12.1 RATING FOR AYR AS A FESTIVAL DESTINATION

A total number 238 responded to this question which equals 93% of all respondents. The rating scale is 'Rating 1 = Suitable' and 'Rating 7 = 'Not Suitable'.



Again very positive results have been received to this question and the vast majority of respondents rate Ayr as a suitable Festival destination.

4.12.2 MOST IMPRESSIVE/MOST DISAPPOINTING ASPECTS

The most disappointing and impressive elements of the festival/location are detailed below.

Negative Factor	Respondents
Litter/Dirt	31
Weather	22
Transport/Signage	14
Poor Marketing	13
Local Youths	6
Poor Building Maintenance	5
Miscellaneous	12

Note multiple responses were indicated hence tabulation is by total number of respondents.

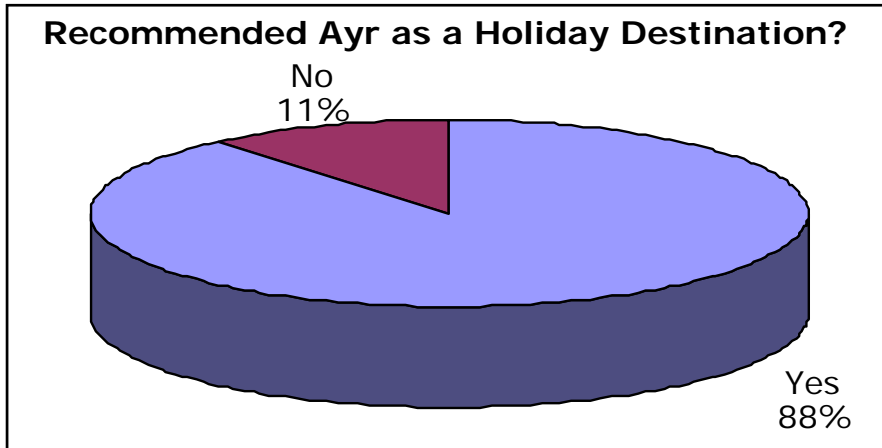
Positive Factor	Respondents
Venue/Location	42 (particularly Culzean)
Scenery	23
Seafront	22
Burns/Museums/Heritage	18
Amenities/Pubs/Shops	12
Friendly	9

Note multiple responses were indicated hence tabulation is by total number of respondents.

The venue/location suitability remains critically important.

4.13 RECOMMEND AYR AS A HOLIDAY DESTINATION?

There were 214 responses to this question which equals 99% of the total number of respondents. Of this number, 88% thought that Ayr could be recommended as a holiday destination while the remaining 11% would not recommend it.

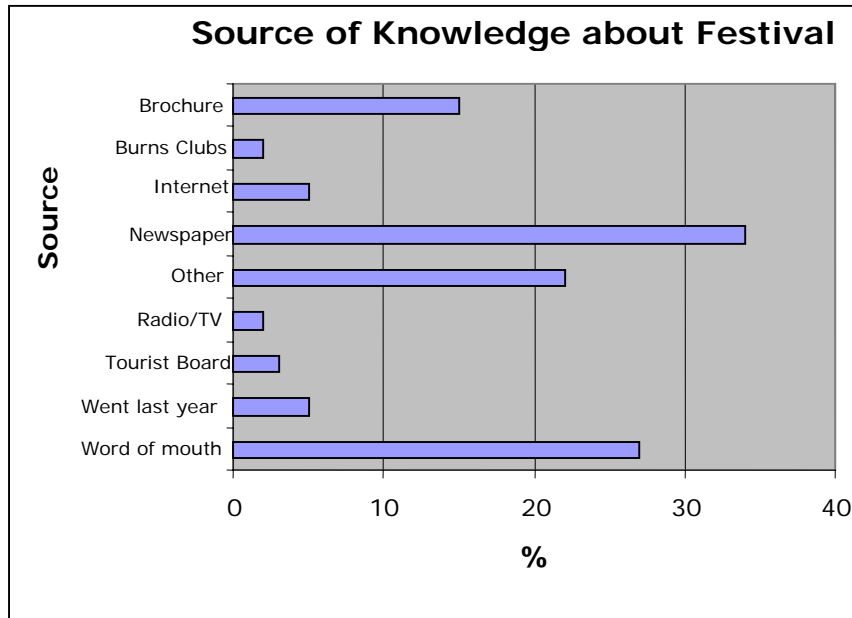


The main reasons why 11% of respondents would not recommend Ayr are:

- Not much to do
- Weather
- Litter
- Youths

4.14 SOURCE OF KNOWLEDGE ABOUT FESTIVAL

The main sources of knowledge were as follows:



The main source was via newspaper advertisement which accounted for 34% of all respondents to the survey. The next most common source was 'word of mouth' which accounted for 27% of all respondents followed by 'other' which equated to 22% of all respondents. The category 'other' included the church, work, library, radio and school.

Considerable coverage of the event also occurred in the form of editorials and supplements of newspapers at a local and national level. Whilst this is not advertising it does serve to raise coverage of the event and increase profile. Similarly the 'in kind' sponsorship press coverage received from the Scottish Media Group also contributed significantly to the profile of the event.

5.0 ADVERTISING EXPENDITURE EQUIVALENCES

Analysis of press and media was undertaken by the Moffat Centre project team and related to Visit Scotland's general tracking of tourism press. Furthermore extensive coverage was provided by the Event organisers and useful data was also forwarded from Ayrshire and Arran Tourist Board. Tracking commenced in March 2002 well prior to commission. Equivalences were costed on the basis of advertising costs in that medium.

Media	Advertising Equivalence
Newspapers (including local, tabloid, broad sheet)	202,500
TV (including local, BBC/Independent and satellite)	1,589,000
Radio (including local, national)	39,500
Internet (Festival Website 7,550 Unique visitors)	281,900
(Festival Website 29,667 visits)	71,200
Total	2,184,100

NB Newspaper coverage breakdown was built around:

Core Festival	81%
Fringe Festival	2.5%
TV/Film Festival	16.3%
Agricultural Show	0.2%

Media coverage and particularly analogue and satellite TV coverage was little short of spectacular. The increase in anticipation at a local, Scottish and UK level in printed media was particularly strong. This was aided in part by the addition of other elements. Existing events such as the Agricultural Show generated additional specialist coverage and new events such as the TV and Film Festival increased core coverage.

There were some useful humorous and special interest angles exploited by the press such as the locational comparison of the Film Festival, the extensive personal coverage of Eddi Reader and to a lesser extent Patti Smith. Given the presence of such international performing artists the coverage in overseas / international press was considerable. This ranged from extensive reviews of concert performances by music magazines to main stream US newspapers. In terms if international destination awareness such coverage becomes difficult to quantify

The website was particularly successful in terms of marketing and raising festival awareness. Some 3,567,824 hits were registered, some 29,667 visits and 7,550 unique visitors were recorded. This was at least partially because of good affiliate marketing/referrals and prominent positions on search engines. Furthermore AATB undertook a highly successful awareness raising exercise involving an electronic post card with links to the web site . This was undertaken just before 14 February 2003 (St Valentine Day) and utilised Red Rose imagery to link Burns and the Burns Festival with this date. This electronic postcard was forwarded to USA, Australia, Sweden and Canada and received early positive coverage for its creative theme in the Scotsman newspaper in mid February 2003.

The TV coverage and the broadcast of the Culzean concert by three TV stations was a result of particularly strong negotiations via the events organiser.

Furthermore the line up of musicians/entertainers was of significant stature and variety to ensure coverage.

Post event media review and commentary equally served to keep the event, location and calendar date in many minds.

6.0 SPONSORSHIP AND PUBLIC SECTOR SUPPORT

Main Festival Funding

Public sector support:

£100,000	VisitScotland
£40,000	Scottish Arts Council
£100,000	Scottish Enterprise Ayrshire
£100,000	Event Scotland
£100,000	South Ayrshire Council
£151,250	Strathclyde European Partnership
£40,000	East Ayrshire Council

£631,250 **Total Festival event public sector funding**

Commercial Sponsorship:

£25,000	Bank of Scotland
£2,500	ATM Travel

£27,500 **Total Festival/Fringe event commercial funding**

Fringe Event Funding

£25,000	Scottish Enterprise Ayrshire
£5,000	North Ayrshire Council

£30,000 **Total Fringe event public sector funding**

TOTAL EVENT FUNDING: £688,750 (Main Festival and Fringe)

Private sector support was predominantly one main sponsor, the Royal Bank of Scotland with a contribution of £27,500. This gives a public to private sector funding ratio of 24:1. Any sponsorship publicity and promotion (in kind contribution) from the Scottish Media Group (SMG) though invaluable is not included in this calculation.

Thus total festival funding is estimated at:

£688,750.

Whilst sponsorship may appear low it should be seen in the context of:

- Burns and a' that is still a new festival operating for the second year and remains an unproven promotion event
- The economic climate was not conducive to significant funding given the downturn in the market sectors of many potential sponsors and the impact on tourism events
- The problems of comparable festivals obtaining funding.

It is worth noting that established events such as Edinburgh's Hogmanay struggle to obtain tangible sponsorship in the current economic climate.

7.0 TOTAL VISITATION

Total visitation was determined from the following sources:

- Ticket Sales (paid admission elements)
- Fringe Events
- Crowd Estimates (free elements).

Crowd estimates were provided by event organisers, police and tourist board. The following total visitation to festival is thus generated from at best imprecise data. What complicates this figure further is the extent of local visitation of the festival and the visitation by tourists who would be in the area anyway (ie pre-booked accommodation).

This calculation of economic impact excludes event organisers, artists, performers, musicians and any staff associated with the production of the event. Such usage of facilities would not have occurred without significant public sector catalyst funding.

Primary tangible benefits have to be divided between additionality and displacement from existing visitations.

	Visitor Numbers/ Ticket Sales
Holy Fair, Mauchline	10,000
Fringe Events	7,198
Main Events	16,609
Culzean	1,978
Other Ticketed Events	1,788
Free Events	11,127
Total Visitation	48,700
Less Ayr Agricultural Market	15,000
Less Girvan Folk Festival	1,009
Total Visitation Burns an a That	32,691
Less Ayr/Ayrshire element (32%)	10,461
Additional Visitation	22,230
Less 25% Pre-booked Accommodation	5,557
Real Additional Visitation	<u>16,673</u>

This equates to an income coefficient of 1.42 which provides a contribution to the local economy when measured against the cost of operating the festival.

It is reduced in emphasis by:

- Local usage/free accommodation
- Low levels of expenditure per head by locals
- Low levels of UK/International visitation
- Early period of festival development (second year).

In comparison with the first year of the Festival (2002) the income and economic impact has risen significantly (see table below).

Expenditure/Impact	2002	2003
Real Visitation	9,614	16,673
Expenditure Profile/Visitor	£55.96	£57.00
Local Direct Expenditure	£538,000	£950,361
Income Coefficient	1.0	1.42

8.0 ECONOMIC IMPACT

The expenditure profile per visitor is derived from the expenditure data collated from the intercept survey of 215 visitors and it equated to: £57.00.

This figure is then multiplied by additional visitors.

Thus local direct expenditure is calculated at

$$16,673 \times £57.00 = £950,361.$$

9.0 INTANGIBLE SOCIAL AND ECONOMIC IMPACTS

There are always impacts associated with a festival that are difficult to quantify in any objective way. These may be classified as:

Social Impacts

Community Development

This is relatively difficult to ascertain in this case but could include future potential investment in infrastructure, potential for increased arts/events in the Ayrshire area. An event like the Burns and a' that Festival serves to catalyse local arts, theatre and literary initiatives through aspects such as the highly successful Fringe Festival. This is the major format for involvement of local community and extending inclusion. **The Fringe has grown in size from 45 events in 2002 to just under 70 events in 2003.**

Some events have now become significant at a local and area level . For example the Holy Fair in Mauchline is now part of the area events calendar and a significant local/visitor element make it the focus of that first weekend in May.

The event achieves good levels of social inclusion by the large number of free or reduced price entry events and performances. High local utilisation has led to a more positive perception of the event and the role of such occasions as part of the annual calendar of Ayr and the surrounding area.

The infrastructure to facilitate social inclusion was also more clearly in place in 2003 with a range of free transport modes to allow for attendance at events and performances at a relatively lower cost. Services were operating from : Girvan, Saltcoats and Cumnock to Ayr in order to facilitate free public access and it is likely that in future, as awareness, grows so will utilisation and consequent social inclusion.

Civic Pride

This is sometimes referred to as 'psychic' income, ie the benefits derived from hosting a major event on the local resident population. Residents feel enthusiastic and positive about their location as the setting for such an event.

Event Product Extensions

Wherein the event catalyses related or allied events to be located in the area. This is most evidenced by the number of events which have now come under the Burns an a' that festival, eg TV and Film Festival.

Economic Impacts

Primarily there are a number of less easily quantifiable elements present notably

Media Impact

From festival coverage and a costing for advertising equivalencies was detailed earlier. Such measures are invariably crude and their impact in terms of marketing and promotion is difficult to evaluate. There is no doubt that in 2003 the festival positively enhanced the image/appeal of Ayr/Ayrshire particularly given the emphasis on Scottish creativity. Such image enhancement should have long term beneficial effects on tourism and tourism investment.

Long Term Tourism Promotion Benefits/Destination Awareness

The impact of regular quality events, festivals or celebrations is no more better illustrated than with the Glasgow Garden Festival of 1988 and the European City of Culture status achieved in 1990.

Reputations and image can be positively enhanced by a successful festival programme and events calendars.

Employment Impacts

Despite a very limited response from industry we have re-examined data and estimate a local employment generation factor was present particularly over the core festival. It is our estimate that up to 26 FTEs were created over the core festival period.

Improved Methodology

A number of improvements have been suggested and these are detailed below:

- (a) In order to increase industry participation and feedback on expenditure an improved methodology has been suggested and endorsed by the steering committee. This will be actioned via:
 - questionnaire distribution to accommodation providers that is incentivised to ascertain expenditure, origins, knowledge, etc
 - questionnaire distribution will be encouraged by closer co-operation/communication with accommodation providers and introducing incentives for them to undertake survey distribution.
- (b) More detail on air passengers could be achieved by intercept surveys on exits at Prestwick airport prior to and during the festival.
- (c) Travel data should be more clearly delineated by drive time/travel time from original destination.

10.0 CONCLUSIONS AND RECOMMENDATIONS

Festivals can be pivotal in ensuring visitors become aware of a destination and decide to visit and return to that destination. Such an event serves not only to attract visitors over the period of the festival but helps to raise destination awareness and build visitation throughout the year.

Festivals take time to build, establish and develop brand awareness. That Scotland lacked a platform to promote its national literary figure was a major omission. The logical home for that platform remains Ayrshire. This second festival is a step on that road which will build:

- Scotland's reputation for creativity, innovation and cultural significance
- The development of Ayr, Ayrshire and South West Scotland as a destination
- The building of a decentralised major cultural events strategy (incorporating urban, rural and coastal locations)
- The establishment of Ayr as a major cultural platform for future festivals.

This event and the previous one in 2002 helps build awareness of Burns and Ayrshire in anticipation of the 250th anniversary of the birth of Scotland's most important literary figure in 2009. In order to build a Festival that has potential to significantly attract overseas / international visitors it must continue to stage high profile, major events which have the potential to raise awareness of the destination and drive quality. The involvement of key quality marques such as Turnberry Hotel and Resort will clearly help in this regard as will the involvement of world class performers and innovative programming which characterised the festival in 2002 and 2003.

The estimated additional expenditure of £950,361 and the community and destination promotion given to Ayr and related regions by a festival and related events attracting people was significant. The advertising expenditure equivalence at over £2 million means that the investment of £688,750 has been returned.

Burns is synonymous with Ayr and Ayrshire, its landscape, people and heritage. Ayr must now become equally synonymous with the Burns festival – Burns and a' that. The challenge is a real one and the time frame for development should not be unrealistic.

Ayr has two world class venues in Alloway and Culzean. It has the tourism infrastructure of hotels, restaurants, bars, etc to support such a festival. The major 'signature' or unique 'tools' of the festival remains Burns.

The extension of the festival to incorporate existing events within the time frame of the festival has a logic however the geographical focus of the festival is being stretched. This is dangerous, such a festival needs a clear centre. Any attempt to extend a festival to an increasing range of tangentially connected locations risks diluting coherence.