

## MAINTAINING THE TOURISM IMPACTS OF THE EDINBURGH FESTIVALS

Ulrike Chouguley, Richard Naylor, and Cristina Roseberg  
BOP Consulting  
London, UK  
richard@bop.co.uk  
ulrike@bop.co.uk  
cristina@bop.co.uk

### ABSTRACT

In 2010, BOP Consulting was commissioned by the Scottish Government, the country's tourism promotion agency VisitScotland, and a number of other public bodies to undertake the most wide-ranging analysis to-date of the impacts of the 12 Edinburgh Festivals. This analysis included a full economic impact assessment, as well as analysis of the cultural, social, environmental and media impacts of the Festivals. The results are revealing in terms of the centrality of tourists to the economic and environmental impacts, but also to the ability of the Festivals to shape visitors' opinions of the city and of the wider country.

**Key Words:** impact assessment; festivals; cultural tourism.

### INTRODUCTION

Festivals are an increasingly popular tool used to market cities nationally and internationally. In addition to longer established festivals such as Edinburgh, Avignon or Salzburg, many cities develop large-scale cultural events and festivals as catalysts for regeneration and destination marketing. Cultural tourists are one of the main markets that cities and towns hope festivals will attract. The Edinburgh 'Festival' – known singularly but actually a collection of simultaneous summer festivals – amounts to the largest arts festival in the world. But the Festivals also extend beyond the summer period, to provide an all-year festival offer and the city promotes itself as the 'No.1 Festival City in the World'.

Festivals, along with other 'mega events', have for many years been the focus of economic impact studies. Tourists are at the heart of this impact – they stay longer and spend more than locals. However, other impacts have not been so well examined (Langen & Garcia, 2008), such as the way that festivals help to shape visitors' opinions of a place, the cultural impact that festivals may have, or indeed their environmental impact.

In the case of the Edinburgh Festivals, a major study that assessed the collective economic impact of the (at the time 17) Edinburgh Festivals was carried out in 2004/05 (SQW, 2005). However, initial thinking around how to measure the Festivals' impact was developed even before then. As early as 2001, the City of Edinburgh Council's Festival Strategy set out a series of potential measures for identifying the economic, but also some cultural, social and 'profile' impacts of the Festivals (Graham Devlin Associates, 2001). More recently, Carlsen *et al.* (2008) developed a research agenda for the Edinburgh Festivals that argued for moving beyond economic impacts and to include cultural and social impacts.

In 2010, BOP Consulting was commissioned by the Scottish Government, the City of Edinburgh Council, VisitScotland and a number of other public bodies to undertake the most wide-ranging analysis to-date of the various impacts of the 12 Edinburgh Festivals. This analysis included a full economic impact assessment that enables comparison with the figures from the 2004/05 SQW study, as well as analysis of the cultural, social, environmental and media impacts of the Festivals. This is the first time that this kind of '360 degree' quantitative assessment of the value of festivals has been attempted on this scale (BOP, 2011).

This paper explores the tourist dimension of the Edinburgh Festivals' impact, from the huge revenues that they bring to Edinburgh and Scotland, to what they think of the city and Scotland as a result of the Festivals. The paper then looks at the marketing strategies that public sector agencies have put in place to stimulate and grow the value of Festival tourism, in the context of wider processes of economic and political development.

### STUDY METHODOLOGY

The ambition of the Edinburgh Festivals Impact Study was to provide an 'in-the-round' quantitative assessment of the Festivals' impact (BOP Consulting, 2011). Precedents and best practice in the festival and events sector are scarce. As Langen and Garcia (2008) argue in their literature review of major cultural events, most studies focus on short-term economic impact. Where studies look beyond economic benefits, media impacts are most frequently quantified. In contrast, social and cultural impacts are taken to be 'soft' and are

usually assessed through qualitative research alone. Environmental impact remains an area ‘virtually untouched’ (Langen & Garcia, 2008). This is in part, they argue, a reflection of the commissioners’ bias, who are interested in showcasing positive impacts, and in part due to the greater difficulty in measuring the wider cultural, social and environmental impacts.

Langen and Garcia (2008) also acknowledge that the development of tools for measuring impact mainly takes place within the context of small-scale events. But they miss that in the UK (at least), there are also a number of transferable methods from wider cultural sector research that can be applied to major cultural festivals and events, such as the Generic Learning Outcomes developed for the cultural heritage sector, as well as those developed for other sectors (e.g. the Carbon Trust’s Carbon Footprint methodology, or Volunteer England and Volunteer Scotland’s Volunteer Impact Assessment Toolkit). The Edinburgh Festivals Impact Study (2011) drew on these approaches to develop quantitative outcome measures for estimating the economic, cultural, social, media and environmental impact.

The few studies reviewed in Langen and Garcia (2009) that did look at cultural and social impacts, were often based solely on opinions and judgments made by festival organisers or strategic stakeholders. In developing the quantitative outcomes framework for the Edinburgh Festivals, BOP Consulting vastly extended this narrow, potentially self serving, approach by exploring the question: ‘Who do the Festivals have an impact on?’ This process of mapping who the stakeholders for the different festivals are identified two groups: firstly, the Festivals’ ‘core’ stakeholders who were included in the impact research (i.e. audiences, performers, delegates, attending journalists, volunteers, temporary staff, teachers, and Festival organisers) and secondly, the ‘wider’ stakeholders, who were not included in the study, such as non-festival attending residents, non-beneficiary local businesses, and the wider Edinburgh and Scottish cultural events sector.

The inclusion of the range of impact areas and stakeholder groups resulted in an ambitious and far-reaching programme of primary research. The scale and depth of the study exceeds all previous research projects carried out on behalf of the Edinburgh Festivals, and may be unprecedented internationally. More than 50 separate surveys were conducted across the twelve Festivals, involving in total more than 15,000 respondents across seven different survey cohorts. Audience responses accounted for by far the largest proportion of survey respondents and this paper will focus in particular on the results from tourists – here defined as Festival audiences from outside Scotland. The study used a mixed-method survey approach (including assisted face-to-face, paper self-completion and online questionnaires). Statistical tests showed that the different survey mediums did not introduce any bias in terms of key variables within the economic impact calculations.<sup>1</sup> The methodology used for assessing the economic impact followed the principles of the Scottish Government and HM Treasury’s *Green Book*, which means that only the economic contribution which is genuinely additional has been considered. The largest part of this economic contribution is made by tourists, as they spend more, stay for longer, and their expenditure is more likely to be genuinely additional.

## ECONOMIC IMPACT

This section presents key findings relating to the tourism dimension of the Festivals’ impact. In 2010, the twelve Edinburgh Festivals attracted an audience of over 4.2 million. This includes both paid and free events, such as the Fireworks concert that closes the Edinburgh International Festival, the Jazz & Blues Festival’s Mardi Gras event, or the Unbound series at the Book Festival. Most of the attendances are made at the large Festivals, in particular the Edinburgh Festival Fringe which accounts for almost two thirds with more than 2.7 million attendances. A sizeable proportion of those attendances are made by tourists, more than 40% in total. As Table 1 below shows, there is again significant variation across the Festivals, with the Royal Edinburgh Military Tattoo attracting the highest proportion of tourists (78%), followed by Edinburgh’s Hogmanay (60%).

In the main, contributing to the economy is not a core aim of the Edinburgh Festivals. However, as the Festivals have grown in size and stature, they have nevertheless become a key contributor to the economy of both Edinburgh and Scotland, as shown first by SQW (2005). Harvie (2003) goes beyond this and argues that the Festivals have assisted with the very transition from an economy strongly dependent on heavy industries to one increasingly based on services and tourism.

The economic importance of the Festivals lies primarily in the expenditure made by audiences on tourist trips to the Festivals. Most of this expenditure is generated outside of the cultural sector, and is made

<sup>1</sup> OLS regressions were estimated to compare reported daily expenditure per person per method (face-to-face surveys, online self-completion, paper self-completion). The regressions were controlled by i) visitor composition effects and ii) a dummy to indicate whether the festival took place over the summer.

instead on items such as accommodation, food and drink, shopping and transport. In this way, the Festivals economic impact is larger for the wider economy of Edinburgh and Scotland than it is for the cultural economy.

**Table 1**  
**Number of attendances and proportion of tourists, by Festival**

<b>Name of Festival</b>	<b>Attendances</b>	<b>% of tourists</b>
Science	124,285	10.8
Imaginate	9,300	4.9
Film	44,456	14.9
Jazz	37,300	10.9
Tattoo	220,000	77.9
Fringe <sup>2</sup>	2,743,913	45.8
Mela	34,590	11.9
Art <sup>3</sup>	306,378	45.8
International	396,713	32.2
Book	200,737	15.9
Storytelling	17,556	24.6
Hogmanay	137,000	59.7
<b>Total</b>	<b>4,272,228</b>	<b>43.1</b>

Source: Festivals Edinburgh/BOP Consulting (2011)

Following all best practice in economic impact assessment and appraisal (c.f. the UK Treasury's *Green Book* – a set of guidelines for undertaking economic impact assessments and appraisals), a key stage of the economic impact calculations is to establish how much of the expenditure made by all types of visitors to the festivals is genuinely 'additional'. That is, some of the expenditures may have been made in any case while other expenditures made at the Festivals may simply have displaced expenditure that would have been made elsewhere in Scotland. Calculating this 'additionality' is essentially, then, a conversion process from the gross economic impact to arrive at a net economic impact for the Festivals. In particular, many Edinburgh residents who attend the Festivals might have visited the city and spent money on their trip even if the Festivals had not taken place. Therefore the expenditure incurred on a trip to the Festivals is simply deadweight and cannot be considered to be additional. Similarly, for many of the day visitors from the rest of Scotland, expenditures made at the Festivals are likely to have simply substituted expenditure that they would otherwise have made elsewhere in the country. Therefore while this expenditure remains additional to Edinburgh, it is not additional to Scotland as a whole. Both of these types of 'non-additional' expenditures were tested for through the surveys and indeed, based on the survey responses, the vast majority of expenditure made by local visitors was subsequently excluded at this stage (97% for Edinburgh and 99% for Scotland). Much the same occurred with day visitor expenditure, as while 85% was additional to Edinburgh, only 1.6% was additional to the Scottish economy as a whole. What this means is that, in addition to the scale of a Festival, simply having a higher proportion of (staying) tourists attending will significantly increase the economic impact of a Festival.

Gross expenditure in Edinburgh made by audiences is circa £221 million. After converting the gross expenditure into net expenditure – i.e. the proportion of expenditure that is genuinely additional – for 2010, the net expenditure in Edinburgh was just over £126.7 million. Tourists from outside Scotland generated the vast bulk of the expenditure: £106.7 million, which accounts for 84% of all of the net audience expenditure.

After adding the expenditures made by performers, journalists and festival organisers, the last stage in calculating the net economic impact of the Edinburgh Festivals is to account for the 'knock-on' or secondary effects that the Festivals have on the economies of Edinburgh and Scotland. These are calculated by applying a set of well established 'multipliers' that are regularly used by the Scottish government in economic impact studies.<sup>4</sup> After applying the multipliers, in 2010 the Festivals:

- generated £245 million in new output (i.e. the net new sales produced by all the sectors of the economy as a result of the various new streams of expenditure) to Edinburgh and £261 million to Scotland

<sup>2</sup> This figure includes High Street footfall figures, which are estimated by City of Edinburgh Council footfall counters at 914,000 people. However, for the purpose of the economic impact calculations, only the 1,829,913 ticketed attendances were included.

<sup>3</sup> Due to the insufficient sample size achieved from the Art Festival survey, the Festival was excluded from the economic impact calculations.

<sup>4</sup> Further details on all aspects of the economic impact methodology used in the study can be found in the Technical Report produced as part of the study (BOP Consulting, 2011).

- generated £59 million in new income (i.e. the income from wages, salaries and profits accruing) within Edinburgh and £82 million in Scotland
- supported 5,242 new Full Time Equivalent jobs in Edinburgh and 4,917 in Scotland.<sup>5</sup>

While there are some small differences in methodology between the first SQW study in 2004/5 and the BOP study in 2011, the figures are broadly comparable. The intervening years have shown considerable growth in the economic impact of the Festivals, with all of the key economic indicators given above having increased by more than 40% over the period.

### PLACEMAKING IMPACT: CITY AND NATION

Considering the significant contribution that audiences from outside of Scotland make to the Edinburgh and Scottish economy, it is not surprising that public policy makers are interested in attracting tourists to the city. As Waterman (1998) argues, successful festivals help define places and create a sense of place. They are a 'medium for the local culture to reach a global audience' (Carlsen, 2008:4). Thus, the Edinburgh Festivals have a key role to play in ensuring that external visitors have a positive perception of Edinburgh as a place to visit.

BOP's Edinburgh Festivals Impact Study examined the extent to which the Festivals shape visitors' perception of the city. Firstly, tourists were asked whether the Festivals make Edinburgh a distinctive place: 93% of them agreed with the statement that 'The Festivals were part of what makes Edinburgh special as a city' (and 54% strongly agreed). A further aspect that has contributed to Edinburgh's existing reputation as 'a Festival city' is the number of Festivals that take place in parallel during the summer period – which is unrivalled on the global stage. Tourists visiting the summer Festivals were therefore asked whether having multiple Festivals running at the same time made them a more attractive proposition to attend. Overall 78% of non-Scottish visitors agreed that the multiple festival offer 'adds to the overall appeal' (including 39% who strongly agreed).

The next indicator looked at whether this appreciation of the Festivals translates into an intention to return to Edinburgh at another time. More than three quarters (77%) of tourists said that they were more likely to come back because of their Festival experience. The latter figure is particularly noteworthy given the significant economic contribution that these visitors make. In addition, those from outside Scotland also have the furthest to travel to Edinburgh and it requires greater effort and cost (including in many cases a plane journey) for them to return to the Festivals than visitors who live within Scotland. Therefore, having this group stating that the Festivals have increased their intention to re-visit the city is a very positive finding for the city's policymakers. Moreover, the research also suggests that this intention does indeed translate into future visits. 44% of non-Scottish audiences had attended the Festivals before and many had done so for several years: on average, they had attended for an astonishing 4.5 years prior to the 2010 event.

These findings suggest that the Festivals are a very powerful motivation for external visitors to come to Edinburgh – and to Scotland more widely. This is further supported by other data from the research. Tourists were asked specifically about how important the Festivals were in their decision to visit Scotland: 82% of these respondents<sup>6</sup> stated that the Edinburgh Festivals were either 'their sole reason' (33%), 'a very important reason' (33%), or 'a fairly important reason' (16%) to visit Scotland. This clearly shows the importance of the Festivals to not – just the Edinburgh tourist economy – but to the national, Scottish tourist economy.

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

Using the case of the Edinburgh International Festival (EIF), Prentice and Anderson (2003) examined the extent to which festival experiences impact on tourists' image of Scotland. They found a dichotomy: while the Festival portrays an image of contemporary culture, visitors to the EIF saw Scotland the country within the

<sup>5</sup> Please note that Edinburgh is included within all of the Scotland figures. Although this may seem counter intuitive from the jobs figure, it should be remembered that this is a calculation of net additional jobs and more of these are created in Edinburgh, due to lower levels of substitution – again, see the Technical Report (BOP Consulting, 2011) for further details on the economic impact methodology.

<sup>6</sup> More specifically this was visitors that were staying in Edinburgh and, in addition, stayed one or more nights in the rest of Scotland.

context of a traditional, rural image. Almost ten years on, BOP's study shows more convergence between how visitors view the Festivals and how they view the country: 85% of audiences agreed (including 41% who strongly agreed) that the Festivals promoted an outward looking, positive Scottish national identity, while only 3% disagreed. The study then asked whether audiences were aware of the diverse range of cultural influences and experiences that Edinburgh has to offer through the Festivals. Again, responses showed a very positive perception: 85% agreed (including 38% who strongly agreed) that the Festivals are events that showcase Edinburgh's diverse culture.

### SUSTAINING THE TOURISM IMPACTS

It is important to note that Edinburgh's Festivals have their roots in a very different era. They began in 1947 with the Edinburgh International Festival, which was intended to 'provide a platform for the flowering of the human spirit' as part of the post Second World War reconstruction efforts in the UK. The Edinburgh Festival Fringe started in the same year. The Festivals' rise to prominence since this time has largely been organic. However, latterly this has changed somewhat. Over the last decade, public agencies in Scotland have invested greater sums in both product development and marketing and promoting the Festivals. For instance, in 2010, combined public sector investment in the 12 festivals totaled £10.5m.

The backdrop to the increased interest shown in the Festivals – which now stretches far beyond both cultural and tourism agencies into the mainstream economic development agencies and highest political agendas in both Edinburgh and Scotland – is twofold. First, the move to a more globalised and service-dominated economy, in which cities and regions find themselves in greater competition, means that culture has become not just a key marketing tool for cities (Zukin, 1995), but also a key part of a city's all round competitiveness, either through planned interventions (Dziembowska-Kowalska, 1999; Garcia, 2004) or through the 'buzz' of the general cultural milieu (Bathelt *et al*, 2004; Venables & Storper, 2004). But in the case of the Edinburgh Festivals, another factor overlays these by now well-documented processes of contemporary city-region competition. This is the process of nation building.

Scotland gained a devolved government – with separate powers in a range of policy areas that include, importantly, culture – only comparatively recently after winning a referendum in 1997 that saw the (re)establishment of the Scottish Parliament in 1999. Additional devolved powers have been granted since the referendum and the momentum to create and promote a distinctly Scottish nation gained even greater pace when the pro-independence Scottish National Party (SNP) became the largest party in the Parliament in 2007, and the first political party to form a majority government after their landslide election victory in 2011. Since being in power, the SNP have underlined the importance of culture within their political project by identifying 'National Identity' as one of the fifteen outcomes that describes what the government wants to achieve over the next ten years.<sup>7</sup> Increasing support for Edinburgh's Festivals from the devolved government in Scotland therefore also has to be seen within this broader strategic commitment to forging a modern, confident national identity for a (re)emerging nation.<sup>8</sup>

This final substantive section of the paper, then, looks at a range of marketing and development strategies that the Festivals have employed in collaboration with public sector bodies and businesses to stimulate and grow the value of Festival tourism (as witnessed in the rise in the economic impact of the festivals over the last six years). Importantly, much of the more recent marketing focus has been on the development of joint marketing strategies across the Edinburgh Festivals. In 2006, the Scottish Arts Council commissioned the *Thundering Hooves* report, which recommended that a strategic framework for partnership action was put in place to ensure that the competitive edge of Edinburgh's Festivals was maintained – against a backdrop of increasing public investment internationally in festivals. In line with this, Festivals Edinburgh – an umbrella organisation that takes the lead on the Festivals joint strategic development – was created the next year by the directors of the city's twelve major Festivals.

One of the key areas of Festivals Edinburgh's work is the implementation of joint marketing and PR activities and this has resulted in the Festivals' first-ever collaborative marketing strategy and plan. This strategy is supported by key Edinburgh and Scottish public agencies and aims to 'innovatively and comprehensively promote the Festivals to new, untapped markets'. While the individual Festivals often focus their own marketing activities on their core (frequently Scottish) audiences, a key target market for joint marketing of the Festivals is

<sup>7</sup> See <http://www.scotland.gov.uk/About/scotPerforms/outcomes> for more details.

<sup>8</sup> For instance, the BOP Edinburgh Festivals Impact Study was launched by the national Cabinet Secretary for Culture and External Affairs, Fiona Hyslop in May 2011.

the London area. In 2010, they launched a partnership with *Time Out* (the London listings magazine) which produced a special Festivals edition, published in late June. Festivals Edinburgh also advertised on the London Underground for the first time, working in partnership with VisitScotland and British Airways.

Internationally, key markets for joint marketing in recent years have been Germany and North America. PR and media events were held in New York and Toronto, alongside a number of visits to key travel writers and journalists. Festivals Edinburgh also led the promotion of the Festivals to tour operators at key trade fairs, such as VisitBritain's Marketplace and ITB Berlin, Europe's largest travel trade fair. In early 2011, eight of the Festivals went on a joint visit to India. Funded by the British Council, with contributions from Creative Scotland and EventScotland, the aims of the visit were to explore artistic collaborations with India; showcase the importance of culture and festivals; and to encourage tourism by promoting Scotland as a creative and welcoming place through the Festivals, especially in the lead-up to the 2012 London Olympics and the 2014 Commonwealth Games in Glasgow. One of the outcomes of this visit is that the Indian Council of Cultural Relations has agreed to become a major partner of the Edinburgh International Festival from 2012 to 2014.

The Festivals' joint marketing approach has also enabled them to produce promotional materials that some of the smaller festivals might not have been able to afford on their own, such as foreign language promotion videos and digital content. For instance, in August 2010, Festivals Edinburgh created a digital navigation tool to help tourists get around Edinburgh, as well as an online daily guide to all events and an iPhone app, offering listings to all summer festivals. Festivals Edinburgh has also been pivotal in securing and delivering the Scottish Government's Edinburgh Festivals Expo Fund, an unprecedented national investment in the Festivals of £8 million since 2008. The fund is aimed at showcasing Scottish companies and artists both at the Festivals and to explore opportunities for the Festivals nationally and internationally.

Another core element of the Festivals' marketing strategy is to work in partnership with the national tourism agency, VisitScotland, and to tie-in with their wider campaigns to promote Scotland. A good example of such a campaign was 'Homecoming Scotland' in 2009, one of the largest collaborative tourism initiatives Scotland has ever staged. The SNP-originated campaign aimed to celebrate Scottish culture and to 'reconnect' people abroad and in Scotland with the country. While the fund provided some additional financial support to a number of key events across the country (including the Festivals), the main support it provided was through the promotional activities that it funded. For instance, the PR and marketing budget of £1.75 million helped to build relationships with more than 6,000 'gatekeeper' organisations worldwide and extend VisitScotland's database by 300,000+ entries. One of the benefits of this campaign was that the Festivals were promoted to this much extended database. The Festivals will also engage with the Year of Creative Scotland 2012, which aims to promote Scotland as a creative nation with a focus on cultural tourism and developing the creative sector.

## CONCLUSION

This paper has highlighted the complex range of impacts that the Edinburgh Festivals have, while focusing specifically on the tourist dimension of these. It foregrounds an exacting and robust methodology for assessing the economic impact of major cultural events, and demonstrates that tourists are the most important contributor to the huge economic impact that the Edinburgh Festivals generate. The paper also shows that the Festivals are successful in promoting a positive perception of Edinburgh and Scotland as all round tourist destinations. The downsides to the Festivals' success in attracting cultural tourists are that tourists are also the biggest contributor to the negative environmental impact of the Festivals (though these impacts have not been included in this paper)<sup>9</sup>. The paper also sets out the key marketing activities that the Edinburgh Festivals have put in place jointly with their umbrella organisation (Festivals Edinburgh) and with other public bodies, including the national tourism agency VisitScotland. These activities, and the wider public investment in the Festivals, demonstrate how central the Festivals have become to both the economic fortunes and contemporary political aspirations of Edinburgh, and increasingly, Scotland.

However, in summing up, it is important to note that while the marketing strategies are an important contributor to the current success of the Festivals, BOP's study also shows that what ultimately sustains the impact of the Festivals is the quality of the Festival experience – i.e. the core of the tourism 'product'. This was first argued in the *Thundering Hooves* report (AEA Consulting, 2006) and the Impact study results empirically confirm this axiom. When asked to rate the quality of the Edinburgh Festivals, 78% of audiences stated that the quality of events at the Festivals was higher than at other comparable events that they had seen. Also, 87% of

<sup>9</sup> For details on the calculation of the carbon footprint of the Festivals, see the accounts given in both the Final and Technical Reports for the overall Impact Study (BOP Consulting, 2011).

attending journalists –who attend many national and international festivals and can be considered to be a good proxy for assessing quality – stated that the Festivals had a ‘high-quality programme of events’. 79% of audiences also thought that the Festival events were a ‘must see event’ and 71% of journalists stated that the Festivals showcased exciting and innovative works.<sup>10</sup> Thus high quality and innovation sits at the very heart of what attracts audiences, and in particular tourists, to come to the Festivals. The Festivals’ quality therefore is the precondition for the wider benefits that the Festivals have – whether this is the major contribution that they make to Edinburgh’s and Scotland’s economy, the influence they have on external perceptions of national identity, or maintaining Edinburgh’s brand status as the world’s ‘number one festival city.’

## REFERENCES

- AEA Consulting (2006) *Thundering Hooves: Maintaining the Global Competitive Edge of Edinburgh’s Festivals*, report commissioned by Scottish Arts Council. <http://www.scottisharts.org.uk/resources/publications/research/pdf/RES21%20Thundering%20Hooves%20Executive%20Summary.pdf> [Accessed 19<sup>th</sup> January 2012, 19.35]
- Bathelt, H., Malmberg, A. & Maskell, P. (2004) Clusters and knowledge: local buzz, global pipelines and the process of knowledge creation. *Progress in Human Geography*, 28 (1): 31-56
- BOP Consulting (2011) *Edinburgh Festivals Impact Study: Final Report and Technical Report*, report commissioned by Scottish Enterprise, the Scottish government, VisitScotland, City of Edinburgh Council, and Creative Scotland. Both reports available at <http://www.festivalsedinburgh.com/downloads> [Accessed 21<sup>st</sup> January, 16.52]
- Carlsen, J., Ali-Knight, J. and Robertson, M. (2008). ACCESS – A Research Agenda for Edinburgh Festivals, *Event Management*, 11(1-2), 3-11
- Dziembowska-Kowalska, J. (1999) Cultural Activities: Source of Competitiveness and Prosperity in Urban Regions. *Urban Studies*, 36 (8 ): 1381-1398
- Garcia, B. (2004) Cultural policy and urban regeneration in Western European cities: lessons from experience, prospects for the future. *Local Economy*, 19 (4): 312-326
- Graham Devlin Associates (2001) *Festivals and the City. The Edinburgh Festivals Strategy*. Report for City of Edinburgh Council. <http://www.efa-aeu/newpublic/upload/efadoc/11/FestivalsStrategy%20edinburgh.pdf> [Accessed 19<sup>th</sup> Jan 2012, 10:40]
- Harvie, J. (2003) Cultural effects of the Edinburgh International Festival: Elitism, Identities, Industries. *Contemporary Theatre Review*, 13 (4): 12-26
- Langen, F. and Garcia, B. (2008) Measuring the Impacts of Major Cultural Events: A Literature Review, *Arts Research Digest*, 44, 1-7
- Prentice, R. and Andersen, V. (2003) Festival as Creative Destination, *Annals of Tourism Research*, 30(1), 7-30.
- SQW (2005) *Edinburgh’s Year Round Festivals 2004-5 Economic Impact Study*, report for The City of Edinburgh Council, Scottish Enterprise Edinburgh and Lothian, EventScotland and VisitScotland. [http://www.efa-aeu/newpublic/upload/efadoc/11/festivals\\_exec\\_summary\\_final\\_%20edinburgh%2004-05.pdf](http://www.efa-aeu/newpublic/upload/efadoc/11/festivals_exec_summary_final_%20edinburgh%2004-05.pdf) [Accessed 19<sup>th</sup> January 2012, 11.14]
- Storper, M. & Venables, A. (2004) Buzz: face-to-face contact and the urban economy. *Journal of Economic Geography*, 4 (4): 351-370.
- Waterman, S. (1998) Carnivals for elites? The cultural politics of arts festivals, *Progress in Human Geography*, 22, (1): 54-74
- Zukin, S. (1995) *The Culture of Cities*. Blackwell: Cambridge, Mass.

<sup>10</sup> The question was phrased as a negatively key statement. 71% of journalists disagreed with the statement that the Festivals ‘showcased too few exciting and innovative events’.