Evaluation of AV Festival 2016
Final report
September 2016

BOP Consulting
Contents

Executive Summary ........................................................................................................................................... 3
1. Introduction .................................................................................................................................................... 5
   1.1 Project background .................................................................................................................................. 5
   1.2 Economic impact methodology .............................................................................................................. 5
2. Economic impact calculation ....................................................................................................................... 7
   2.1 Unique visitors ....................................................................................................................................... 7
   2.2 Additional visitors ................................................................................................................................. 7
   2.3 Daily spend per visitor ........................................................................................................................... 8
   2.4 Economic impact calculation ............................................................................................................... 8
   2.5 GVA and jobs calculation ..................................................................................................................... 9
   2.6 Comparison with previous Festivals ................................................................................................... 9
3. Audience profile and experience ................................................................................................................ 11
   3.1 Audience attendance ........................................................................................................................... 11
   3.2 Audience attitudes and perspectives .................................................................................................... 13
   3.3 Demographic profile ............................................................................................................................ 18
   3.4 Socio-economic profile ....................................................................................................................... 21
Appendix ......................................................................................................................................................... 24
Economic impact assessment methodology .................................................................................................. 24

Photo: Colin Davison. Courtesy AV Festival
Executive Summary

AV Festival is an international biennial Festival of contemporary visual art, film and music, based in Newcastle upon Tyne. AV Festival 2016 was the sixth edition of the Festival and took place from 27 February – 27 March 2016.

The theme of the Festival was ‘Meanwhile, what about Socialism?’, inspired by George Orwell’s famous book The Road to Wigan Pier. Mirroring the structure of the book, the 2016 edition was Part One to be followed by Part Two in 2018. In a new departure the majority of the Festival took place in and around Newcastle, to create a stronger thematic coherence and visitor experience.

The Part One Festival programme included 12 installations, 48 film screenings, 9 artist talks and 4 performances including 17 UK premieres. It was the most international Festival to date with participating artists originating from Bangladesh, Bulgaria, France, Japan, India, Israel, Lebanon, Portugal, Romania, Russia, South Africa and Ukraine.

This report presents findings from the evaluation of AV Festival 2016. It examines audience response and calculates the economic and cultural impact of the Festival. The six key evaluation findings are:

1) The audience is enthusiastic and loyal

AV Festival 2016 attracted 15,293 visits in total. The tighter curatorial focus and absence of large footfall venue partners meant there were considerably fewer visits than in previous years. However, while the audience numbers have reduced, those who attended had a more in-depth and impactful experience.

The proportion of repeat visitors remains consistent with previous editions at 39%, showing that the Festival attracts both new and existing audiences. Of these returning visitors the majority (77%) had attended in 2014, with a further 71% having also visited in 2012. This indicates a loyal and satisfied audience.

In addition, 85% of visitors said they intend to attend Part Two of the Festival in 2018. This is an increase from 2014 when – a still healthy – figure of 60% of visitors said they would visit AV Festival again. This increase reflects the quality of the experience in 2016, and may suggest advantages of presenting the Festival in two parts. The number of Festival events attended per visitor (3.8) remains consistent with 2014, and was presumably assisted by the more compact geography of the 2016 Festival.

It should also be noted that from March – September 2015 the Festival carried out touring activity for the first time, attracting an additional 16,282 visits. These figures are not part of this report, which focuses only on AV Festival 2016.

2) Quality ratings have reached new heights

Audiences rated the quality of AV Festival 2016 very highly. In all, 95% of visitors reported their overall experience as ‘good’ (59%) or ‘outstanding’ (36%), the same as in 2014. 93% said the same about the quality of the programming and 97% about the choice of venue, both a percentage point increase on 2014. The quality ratings have seen consistent increases since 2012, building from an already very high base.

This year, for the first time, pilot Arts Council England Quality Metrics were used to explore visitor experiences. AV Festival 2016 scored highly across all measures of quality. The most positive responses concerned the Festival being challenging (93% agreed ‘it was thought provoking’), relevant (91% agreed ‘it had something to say about the world we live in’), with a high local impact (90% agreed ‘it’s important that it’s happening here’) and strong presentation (94% agreed ‘it was well produced and presented’).

In addition, a high proportion of the audience reported that it was the political subject of the Festival (50%) and the overall Festival theme (49%) that motivated them to attend.

Together this indicates that AV Festival is providing a unique offer to audiences by combining very high quality artistic experiences with a political theme.

3) Visitors continue to be attracted from outside the North East

The proportion of visitors from outside the North East (24%) remains consistent with 2014 figures. The average number of days that visitors reported they were attending the Festival for was 2.8, the same as in 2014, maintaining the step up in number of days per visit that was observed in 2014.
Of the 24% of Festival visitors who came from outside the North East, one third came from London and one sixth came from outside the UK. The Festival has built and maintained a national reputation. It demonstrates the Festival’s ability to draw in visitors regardless of the scale of the Festival programme.

4) The economic impact has reduced but remains significant

The much smaller number of visitors has a cooling effect on audience spending calculations when compared to previous years. So while the economic impact of the Festival remains significant, it is reduced from previous Festivals.

AV Festival 2016 had a net economic impact on the North East of £485,101. This can be converted to a Gross Value Added (GVA) contribution of £246,901 in the North East region (or the equivalent of creating 6.5 full-time equivalent jobs within the region). The majority of the Festival’s impact was felt within Newcastle, unsurprisingly.

5) AV Festival contributes to the North East as a cultural destination

AV Festival makes an important contribution to the cultural calendar of the North East. 90% of those surveyed agreed that it was important that the Festival was happening in this area. The more geographically focused programme may have a stronger impact on Newcastle as a city, and on the motivation to visit the city.

There is some evidence that the Festival can take credit for establishing the North East as a cultural destination. A higher proportion of returning visitors were coming to Newcastle specifically to visit AV Festival, rather than new attendees who were combining their visit with other activities. 67% of visits to Newcastle and 49% of visits to the North East can be attributed to the Festival.

6) Valuable national media coverage is secured

AV Festival 2016 generated a significant media impact, both nationally and locally. Full-page reviews appeared in the following national broadsheet and specialist publications: the Guardian, Sight & Sound, Art Monthly, The Wire and Morning Star, with international reviews in ARTA magazine and Artforum Picks. Additional online coverage was achieved with Sight & Sound, Little White Lies and The Quietus. There was also a positive continuation of local coverage in The Journal newspaper and The Crack magazine.

Conclusions

BOP Consulting concludes that AV Festival has once again shown its important artistic and economic contribution to the North East. AV Festival 2016’s bold political themes and programming make it relevant and engaging for its loyal existing followers as well as new audiences.

The Festival continues to make a vital contribution to the cultural calendar locally and nationally, and has played an important role in establishing the North East as a cultural destination. Artistic impact continues to grow, from a high existing base. The Festival is characterised as being challenging, thought-provoking, rigorous and as having a strong local impact. This consistency in audience quality ratings shows how AV Festival builds on past successes while offering something new each time.

The Festival is a great asset to the North East and is well positioned to deliver a successful Part Two of ‘Meanwhile, what about Socialism?’ in 2018.

AV Festival brings together past and present, history and archive, art and documentation from right across the world. Here, everywhere is local.
Adrian Searle, The Guardian, 5 March 2016

1. Introduction

This report examines the audience’s response to AV Festival 2016. The principal element of this is a calculation of the Festival’s economic impact on Newcastle and the North East of England, measured through a survey of visitors to the Festival, audience data supplied by AV Festival and its partners, and AV Festival management information.

Within the 2014 evaluation report, BOP discussed the merit of retaining a particular treatment of visitor spend that AV Festival had inherited from One North East’s Culture10 festivals (which AV Festival was originally part of). This treatment attributes one day’s worth of spend per visitor to each festival. The assumption was that most visitors attend their chosen festival for just one day. In 2014, it was decided to retain this assumption to enable AV Festival’s impact to be tracked consistently across the years. This 2016 evaluation also retains this treatment and thus is fully consistent with previous evaluations.

However, the 2014 audience survey indicated that AV Festival visitors anticipate their trips taking 2.8 days on average. The 2016 audience survey repeats this finding (see Chapter 3). Thus the methodology used almost certainly underestimates the real visitor spend impact of AV Festival.

1.1 Project background

After a pilot programme in 2003, the first AV Festival took place in 2006, and has been held every two years since. AV Festival 2016 is therefore the sixth edition of the Festival.

Each edition has been evaluated for its impact. The evaluations of the 2006 and 2008 Festivals were conducted by the Teesside School of Social Sciences & Law and Audiences North East respectively, while BOP Consulting has conducted the evaluations since 2010.

Since 2010 the format and structure of each edition of the biennial Festival has changed in relation to its curatorial theme and partners. The main curatorial shifts in 2016 were to embark on a two-part theme to continue in 2018, with a tighter geographical focus to encourage greater audience engagement. The impact of this on the visitor experience and economic impact is discussed more fully alongside the findings below.

1.2 Economic impact methodology

AV Festival commissioned BOP Consulting to quantify the economic contribution that AV Festival 2016 makes to the city of Newcastle, and to the North East region.

To inform the calculation, BOP gathered data on two streams of expenditure:

— First, the goods and services bought by AV Festival from suppliers within the city and the region and from its employees (in the form of wages)
— Second, the spending of AV Festival visitors at other establishments in the city and the region. This might be hotel accommodation, shopping or meals in restaurants, for example.

The two main data sources were:

— AV Festival’s accounts, to determine the total spend within the North East resulting from its operations
— Surveys of visitors carried out during and following the 2016 Festival. A total of 397 valid responses were received, with responses collected online and through paper forms. The survey touched on many aspects of the visitors’ experience of the Festival, including their spending.

Combining the data from these expenditure streams gives the gross economic impact of AV Festival 2016 – in other words, the total volume of economic activity associated with the Festival, in the city of Newcastle and in the North East.

The next stage is to identify the value of economic activity in the city and region that can be directly credited to AV Festival 2016 (known as the net economic impact). The impact methodology used here tries to make sure that the study is only measuring the genuinely ‘additional’ impact of an event. If the spending would have happened in the region anyway, then nothing is being added to the
regional economy – money is simply being re-directed from one spending opportunity (such as a cinema) to another (an art gallery). The gross economic impact figures are therefore adjusted to take account of four additionality effects: displacement, deadweight, substitution and leakage.

However, the recipients of the spending created by AV Festival re-spend much of that income within the region. This in turn creates further demand for goods and services, ‘multiplying’ the effects of the original spending. Standard economic impact methodology adjusts for this through the use of government-calculated multipliers.

Finally, while every effort was made to ensure the study was methodologically sound, it should be noted that, as with any study of this nature, the final figures include some assumptions (for example, of the size of the multipliers), which can only be estimated rather than measured precisely².

“Fantastic, original, well curated and thought-provoking. Socially relevant.
AV Festival 2016 visitor

² A full explanation of the economic impact methodology is provided in the appendix
2. Economic impact calculation

This chapter estimates the economic impact of AV Festival 2016 on Newcastle and the North East of England. The following sections present the calculations made to derive the gross economic impact, net economic impact, jobs supported and GVA contribution of AV Festival 2016. Further details of the calculations can be found in the appendix.

2.1 Unique visitors

We begin by considering the total number of physical visits recorded at all of the Festival exhibitions and events. There were 15,293 visits, of which 12,131 (79%) were to exhibitions and 3,162 (21%) to events. These figures are much lower than those recorded in 2014, reflecting the absence of large footfall exhibition venue partners and shorter duration.

However, it should also be noted that from March – September 2015 the Festival attracted an additional 16,282 visitors to its touring activity in venues across Northumberland (Berwick, Woodhorn, Holy Island) and in the cities of Manchester, Newcastle, Leeds, Durham, Liverpool, Sheffield, Glasgow, Cambridge and London. Therefore, the total visit figure for Festival activity in 2015/16 was 31,575 (although these are not included in the economic impact calculations presented below).

AV Festival also measures its online impact, although this does not count towards the economic impact calculation. The total online audience for AV Festival 2016 is substantial and continues the high level of online engagement observed in 2014.

2.2 Additional visitors

76% of attendees live in the North East, of which 54% live in Newcastle. This is consistent with 2014 when 72% were from the North East.

We discount all spending by city residents, within the city, as we assume these residents would spend their money elsewhere in the city if AV Festival were not there. Similarly, we discount all spend by North East residents, within the North East. This is typical practice in economic impact calculation.

For the remaining visitors, i.e. those incoming from outside Newcastle or the North East, we worked out the impact of the Festival on their decision to visit the region. By ‘weighting’ the answers given we can calculate the proportion of visitor spend that can be attributed to AV Festival 2016 and be considered as additional.

"AV Festival is a fantastic asset to the North East’s cultural offer. AV Festival 2016 visitor
Figure 2 – Why did you visit the area?

<table>
<thead>
<tr>
<th>Response</th>
<th>Weighted as % of visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>I came here just for AV Festival</td>
<td>1.0 33</td>
</tr>
<tr>
<td>I came here to combine AV Festival and general sightseeing in the area</td>
<td>0.5 13</td>
</tr>
<tr>
<td>I came here to combine AV Festival with other things (e.g. to visit friends/family)</td>
<td>0.5 34</td>
</tr>
<tr>
<td>I did not know about AV Festival before I came on my visit</td>
<td>1.0 20</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)

We calculated that 67% of visits to Newcastle and 49% of visits to the North East can be attributed to the Festival. The largest proportion of visitors to the North East state they are coming to the region for AV Festival plus one other thing (general sightseeing or to visit friends/family).

2.3 Daily spend per visitor

Visitors were asked about their spending, the size of their party and how long they stayed, to derive the average daily spend per visitor. Separate calculations were made for visitors from Newcastle and the North East and those who came from outside the region.

Figure 3 - Average spend per day

| Spend per head per day by visitors to Newcastle                          | £37 Not measured         |
| Spend per head per day by visitors to North East                         | £56 £91                  |

Source: BOP Consulting (2016)

The figure for visitor spending is higher for those from outside the North East, as they are more likely to be staying in hotels, going shopping or eating out. This figure is lower than the peak in 2014, but is a return to the levels seen in 2012.

2.4 Economic impact calculation

The gross economic impact calculation is arrived at by summing the total expenditure by AV Festival 2016 within the region with the total visitor spend.

AV Festival is held every two years, and the spending in preparation for each Festival is also spread across two years. As a result, we have included the Festival spending that takes place in financial years 2014/15 and 2015/16.

We also include an estimate for in-kind support. This is primarily venue support costs, staffing and marketing provided by Festival partners.

The gross impact figure is converted to net impact by adjusting for spending that is simply being displaced from somewhere else in the region, or that would have happened anyway. This is done by introducing allowances for what are called additionality and multiplier effects. These are derived from a mix of the survey responses and official government statistics (see Appendix for details).

Figure 4 – Net Economic impact in Newcastle

<table>
<thead>
<tr>
<th>Variable</th>
<th>Gross</th>
<th>Additionality effects</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement expenditure</td>
<td>£94,117</td>
<td>0.91x1.21</td>
<td>£103,632</td>
</tr>
<tr>
<td>Staff expenditure</td>
<td>£138,070</td>
<td>0.91x1.21</td>
<td>£152,029</td>
</tr>
<tr>
<td>In-kind support</td>
<td>£33,417</td>
<td>0.91x1.21</td>
<td>£36,795</td>
</tr>
<tr>
<td>Visitor spend</td>
<td>£107,223</td>
<td>0.67x0.91x1.21</td>
<td>£79,102</td>
</tr>
<tr>
<td><strong>Total impact</strong></td>
<td><strong>£371,559</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)

What a wonderful event. I think it’s excellent for the region.

AV Festival 2016 visitor
The total net contribution that AV Festival 2016 makes to the Newcastle economy is £371,559; and the net contribution to the North East economy is £485,101.

Most of the Festival’s procurement, staff and in-kind expenditure happens in Newcastle. The gross figures only increase a little when ‘zooming out’ to consider the North East region. The gap between Newcastle and the North East figures increases when procurement, staff and in-kind expenditure is converted to net impact, due to reduced leakage and greater multiplier effects at regional level.

### 2.5 GVA and jobs calculation

The net economic impact figures are translated into estimates of the Gross Value Added (GVA) and jobs supported by the Festival.

The total GVA that AV Festival 2016 generated in the Newcastle economy was £185,621; and the total GVA in the North East economy was £246,901.

This is equivalent to supporting 5.8 permanent full time jobs in Newcastle or 6.5 permanent full time jobs in the North East, above and beyond those directly employed by AV Festival.
However, the proportion of visitors from outside the North East (24%) remains fairly consistent, which demonstrates the Festival’s excellent reputation and its ability to draw in visitors regardless of the scale of the Festival programme.

The number of events attended per visitor (3.8) remains consistent from 2014, and is presumably assisted by the compact geography of the 2016 Festival.

Spend per visitor per day returns to 2010-2012 levels (£56) after a large peak in 2014 (of £91). The proportion of repeat visitors remains constant at 39%.

One emerging trend is for the proportion of visitor spend attributable to AV Festival to continue to decrease. Basically, more visitors to the North East say they would have done something else in the region if they had not attended the Festival, or say they came to the region for AV Festival and another reason(s). A plausible explanation for the reduction is that familiarity with or attraction to the North East is increasing. There is some evidence that AV Festival can take credit for establishing the North East as a cultural destination, and that the Festival makes an important contribution to the cultural calendar:

— In 2016, 91% of attendees reported that they would come to something like this again, 85% said they intended to visit AV Festival in 2018, and 90% agreed that it was important that it was happening in the locality.

— In 2016, 77% of returning visitors had visited in 2014, with a further 71% having also visited the Festival in 2012. This indicates a loyal and satisfied audience.

— A higher proportion of returning visitors were coming to Newcastle specifically to visit AV Festival, rather than new attendees who were combining their visit with other activities.

This aspect of AV Festival might be studied in more depth in 2018, and may be a useful area of focus for future marketing to increase the economic impact of additional visits into the area as a result of the Festival.

As a result of the factors above – and particularly the lower visitor spend impact – AV Festival’s role as a local employer and procurer of supplies becomes the more significant driver of overall economic impact.

### Figure 7 - Economic impact comparison between years

<table>
<thead>
<tr>
<th>Measure</th>
<th>2016</th>
<th>2014</th>
<th>2012</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical visits</td>
<td>15,293</td>
<td>58,142</td>
<td>94,096</td>
<td>70,860</td>
</tr>
<tr>
<td>Events attended per visitor</td>
<td>3.8</td>
<td>4.0</td>
<td>2.2</td>
<td>1.9</td>
</tr>
<tr>
<td>‘Unique’ visitors estimate</td>
<td>3,988</td>
<td>14,570</td>
<td>43,333</td>
<td>38,161</td>
</tr>
<tr>
<td>Proportion of audience from outside North East</td>
<td>24%</td>
<td>28%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Have previously attended AV Festival</td>
<td>39%</td>
<td>41%</td>
<td>38%</td>
<td>48%</td>
</tr>
<tr>
<td>Spend per visitor per day</td>
<td>£56</td>
<td>£91</td>
<td>£56</td>
<td>£52</td>
</tr>
<tr>
<td>Proportion of visitor spend attributed to AV Festival</td>
<td>49%</td>
<td>67%</td>
<td>67%</td>
<td>83%</td>
</tr>
<tr>
<td>Net impact from procurement + staff + in-kind</td>
<td>£426,105</td>
<td>£411,490</td>
<td>£577,821</td>
<td>£433,413</td>
</tr>
<tr>
<td>Net visitor expenditure impact</td>
<td>£58,996</td>
<td>£327,079</td>
<td>£513,614</td>
<td>£405,761</td>
</tr>
<tr>
<td>Total net economic impact</td>
<td>£485,101</td>
<td>£889,143</td>
<td>£1,091,435</td>
<td>£839,174</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)
3. Audience profile and experience

As well as establishing visitor spend, the survey also asked the audience about their perspectives on the work they had seen, together with some demographic information about the visitors themselves. This evidence provides a useful context in which to place the findings of the economic impact assessment. We received a total of 397 responses to the attendee survey, which is a large enough sample to be representative of the AV Festival 2016 audience.

3.1 Audience attendance

Attendees heard about the Festival from a wide range of sources. Festival brochures and hearing about it from a friend were the most frequently mentioned. The AV Festival website accounted for 16% with the other most common online sources being Facebook and Tyneside Cinema. The latter also accounted for many of those being signposted by another venue’s marketing. Most of the ‘other’ category was made up of those walking past venues by chance. These findings are broadly the same as in 2014.

Figure 8 - How did you hear about AV Festival? (multiple responses allowed)

<table>
<thead>
<tr>
<th>Communication channel</th>
<th>Number of respondents</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>AV Festival event brochure</td>
<td>135</td>
<td>37</td>
</tr>
<tr>
<td>From a friend</td>
<td>133</td>
<td>37</td>
</tr>
<tr>
<td>AV Festival website</td>
<td>57</td>
<td>16</td>
</tr>
<tr>
<td>Direct mail from AV Festival</td>
<td>40</td>
<td>11</td>
</tr>
<tr>
<td>AV Festival poster</td>
<td>32</td>
<td>9</td>
</tr>
<tr>
<td>Other online</td>
<td>32</td>
<td>9</td>
</tr>
<tr>
<td>Other venue marketing</td>
<td>18</td>
<td>5</td>
</tr>
<tr>
<td>Any other answer</td>
<td>40</td>
<td>11</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)

39% of respondents had been to a previous edition of the Festival. This percentage is broadly similar to the 41% reported in 2014 and shows again that AV Festival attracts both new and existing audiences.

Figure 9 - Have you been to AV Festival before?

77% of previous attendees had visited in 2014, with a further 71% having also visited the Festival in 2012. This indicates a loyal audience, particularly the consistency in repeat attendance at the previous two editions. The proportion of visitors from 2010 was lower (46%) and this trend continued for earlier editions.

“...It was well presented and had a lot to say about the world in which we live. I would definitely come to something like this again.

AV Festival 2016 visitor
Respondents were also asked if they had previously visited the venue, 36% said they had not. This was lower than in 2014 (53%), and may have been due to the fact that the entire film programme took place in one popular venue (Tyneside Cinema). However, it still indicates that the Festival introduces some new audiences to its venues.

Another set of questions asked about audiences’ motivations for attending the Festival. The majority of people were motivated either by the political subject or the theme in general. A quarter also attended because they wanted to support the Festival, which together with the repeat attendance figures shows that the Festival has a loyal audience.

**Figure 12 - Motivations for attending AV Festival (multiple responses allowed)**

<table>
<thead>
<tr>
<th>Source</th>
<th>Number of respondents</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>The political subject of the festival</td>
<td>189</td>
<td>50%</td>
</tr>
<tr>
<td>The overall festival theme</td>
<td>185</td>
<td>49%</td>
</tr>
<tr>
<td>Interest in local arts events</td>
<td>123</td>
<td>32%</td>
</tr>
<tr>
<td>To support the festival</td>
<td>101</td>
<td>27%</td>
</tr>
<tr>
<td>The specific artist or filmmaker</td>
<td>96</td>
<td>25%</td>
</tr>
<tr>
<td>Recommended by a friend</td>
<td>90</td>
<td>24%</td>
</tr>
<tr>
<td>Other</td>
<td>34</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)

Good to see AV Festival making such an explicitly political statement – especially in these times.

AV Festival 2016 visitor
The average number of days visitors reported they were attending for was 4.9. This included 17 people reporting that they were attending for all 30 days of the Festival. When these outliers were excluded from the analysis the average trip lasted 2.8 days. This is the same as in 2014 and continues the upwards trend in length of visit compared to 2010.

Figure 13 - Average number of days per visit (2010-2016)

![Bar chart showing the average number of days per visit from 2010 to 2016.]

Source: BOP Consulting (2016)

People were also asked if they planned to return to the Festival in 2018. The results were very positive with 85% stating that they would like to, a significant increase on the 60% who stated in 2014 that they would return in 2016. It can also be taken as a broad indicator of satisfaction with their experience at this year’s Festival.

Figure 14 - Do you plan to visit AV Festival again in 2018?

<table>
<thead>
<tr>
<th>Intention to visit</th>
<th>Number of respondents</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>332</td>
<td>85%</td>
</tr>
<tr>
<td>Don’t know/too early to tell</td>
<td>56</td>
<td>14%</td>
</tr>
<tr>
<td>No</td>
<td>1</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)

3.2 Audience attitudes and perspectives

The next set of questions explored audience attitudes towards their experiences. To start with, BOP asked about their level of engagement with the arts in general.

94% reported that they engage with the arts three or more times per year. This is consistent with the 93% reported in 2014, and slightly more than in 2012 (89%).

When asked how important to their lives visits to cultural events and exhibitions are the average score was 4.2 out of a possible 5, indicating that the audience are highly engaged in the arts and have strong artistic identities. This also indicates that those attending AV Festival 2016 are significantly more engaged in the arts than the general population. The latest DCMS statistics showed that 60.9% of adults in England had engaged in the arts three or more times in the previous year3.

---

Audiences rate the quality of the Festival very highly. In all, 95% of visitors reported their overall experience as ‘good’ (59%) or ‘outstanding’ (36), the same as in 2014. 93% said the same about the quality of the programming and 97% about the choice of venue, both a percentage point increase on 2014. The quality ratings have seen consistent increases since 2012, which again supports audience satisfaction. The results also compare favourably with other research conducted by BOP. In research published in 2013 we found that 90% of WOMAD’s audience rated the experience good or outstanding. In 2016, for the Edinburgh Festivals Impact Study, 85% of audiences reported their experience was better or far better than comparable events.

The number of events visited by audience members follows the same basic pattern as in 2014, although the proportion stating that they intended to visit no other events has decreased from 17% in 2012 to 11% in 2016. The average
number of events and exhibitions audiences intended to visit was 3.8, which is slightly lower than in 2014 (4.3).

**Figure 18 - Number of other events intending to visit (2012-2016)**

![Graph showing number of other events intending to visit (2012-2016)](image)

Source: BOP Consulting (2016)

This year, for the first time, we asked audiences to reflect on their experiences based on the Arts Council England Quality Metrics. These are currently being piloted nationally and have been designed to cover many different dimensions of what makes a quality arts experience.

Figure 19 indicates that AV Festival 2016 scored highly across all measures of quality. The most positive responses related to the Festival being challenging (93% agreed ‘it was thought provoking’), relevant (91% agreed ‘it had something to say about the world we live in’) and with a high local impact (90% agreed ‘it’s important that it’s happening here’). Presentation (94% agreed ‘it was well produced and presented’), rigour (90% agreed ‘it was well thought through and put together’) and captivation (88% agreed ‘it was absorbing and held my attention’) were also scored highly by attendees.

This data from the Arts Council Quality Metrics is very positive and is closely aligned to the core aims of AV Festival 2016 to be socially relevant, challenging, with curatorial rigour and with a strong sense of place.

In addition to the Arts Council Quality Metrics we asked further audience questions as part of the quality and impact assessment. Figure 20 shows that 78% of attendees reported that the Festival has allowed them to discover new artists and talent, and 76% that it has given them the opportunity to discover new international artists and perspectives. 75% reported that the Festival allowed them to experience something they wouldn’t otherwise, and 64% reported that they were more likely to attend an arts event in the future after attending the Festival. Lower numbers reported that it has improved their understanding of the arts, or that it has made them think differently about Newcastle, although these latter findings were not core aims of the Festival.

"Excellent in every way. Can’t wait for the next AV Festival in the North East."

AV Festival 2016 visitor

---

5 Further information is available at [http://www.arts council.org.uk/quality-metrics/quality-metrics](http://www.arts council.org.uk/quality-metrics/quality-metrics)
Figure 19 - Arts Council England Quality Metrics

Source: BOP Consulting (2016)
Figure 20 - Other quality and impact assessment measures

- It has given me the opportunity to discover new international artists and perspectives
  - Strongly agree: 37%
  - Agree: 39%

- It has given me the opportunity to discover new artists and talent
  - Strongly agree: 36%
  - Agree: 42%

- It has enabled me to experience an arts events that I would not otherwise get to experience
  - Strongly agree: 33%
  - Agree: 42%

- I think differently about Newcastle based on my experience
  - Strongly agree: 20%
  - Agree: 25%

- It has improved my understanding of the arts
  - Strongly agree: 18%
  - Agree: 32%

- It has made me more likely to attend an arts event in the future
  - Strongly agree: 25%
  - Agree: 39%

Source: BOP Consulting (2016)
3.3 Demographic profile
This section of the report examines the demographic profile of the Festival’s visitors.

There was a fairly even gender split with 52% of attendees’ female and 48% male, which is consistent with the past two editions of the Festival.

**Figure 21 – Gender of audience**

![Gender Distribution Chart]

Source: BOP Consulting (2016)

There is a good spread of attendance across the age ranges. Just under a quarter of attendees were aged 25-34, with 10% aged over 65 and 5% under 19. This is broadly in line with the overall population of the North East although there is a higher proportion of under 19 year olds in the general population. The age distribution is consistent with previous years of the Festival, although this year did see a clear increase in those over 45 attending (42% of all attendees, compared to 33% in 2014). These did not come at the expense of any other single age group, with slightly lower proportions across each than in previous years. These trends can be seen in **Figure 22**.

**Figure 22 - Age distribution of attendees (2012-2016)**

![Age Distribution Chart]

Source: BOP Consulting (2016)

The majority of attendees (89%) identified as White British, which is lower than the population of the North East (around 93%) and indicates a slightly higher proportion of ethnically diverse participants than in the general population. This is consistent with 2014 (86%).
AV Festival has consistently drawn around a quarter of its audience from outside the region. The 2016 figure of 24% is the same as 2012 and a little lower than the peak of 28% in 2014.

The share of visitors from outside the North East suggests many people are prepared to travel substantial distances to attend the Festival, and that the Festival has built and maintained a nation-wide reputation.

A third of visitors (33%) not from Newcastle or the North East came just to visit AV Festival 2016, with a further 47% coming to combine a visit to the Festival with other activities (e.g. sight-seeing or visiting friends and family).

76% of respondents are from the North East of England, which is consistent with 2014 (72%). The large majority live in Newcastle (54%), with 29% from the rest of Tyne & Wear (excluding Newcastle), 13% from County Durham, 5% from Northumberland and 1% from the Tees Valley.
### Figure 25 - County of origin within the North East

<table>
<thead>
<tr>
<th>County of origin in North East</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newcastle</td>
<td>54%</td>
</tr>
<tr>
<td>Other Tyne and Wear (excluding Newcastle)</td>
<td>29%</td>
</tr>
<tr>
<td>County Durham</td>
<td>13%</td>
</tr>
<tr>
<td>Northumberland</td>
<td>5%</td>
</tr>
<tr>
<td>Tees Valley</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)

Of the 24% respondents from outside the region, the largest proportion (33%) lived in London, 20% in Yorkshire, 13% in the North West and 9% in Scotland.

### Figure 26 – Region of origin (non-North East visitors)

<table>
<thead>
<tr>
<th>Region of origin (non-North East)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>33%</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>19%</td>
</tr>
<tr>
<td>Outside of UK</td>
<td>16%</td>
</tr>
<tr>
<td>North West</td>
<td>13%</td>
</tr>
<tr>
<td>Scotland</td>
<td>9%</td>
</tr>
<tr>
<td>South East</td>
<td>3%</td>
</tr>
<tr>
<td>South West</td>
<td>3%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>2%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>1%</td>
</tr>
<tr>
<td>East of England</td>
<td>0%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>0%</td>
</tr>
<tr>
<td>Wales</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)

The 16% of visitors from outside the UK is considerably higher than in 2014 (4%). The sample size is very small, however it indicates that international visitors were coming specifically for the Festival, rather than encountering it by chance. It is also possible that some of these were participating artists or involved in Festival events.

A map showing the origin of UK visitors can be seen in Figure 27.

“It’s a privilege to have this fantastic festival here – thank you!
AV Festival 2016 visitor
Figure 27 - Origin of UK visitors to AV Festival 2016

Source: BOP Consulting (2016)
3.4 Socio-economic profile

We also used the postcode data of attendees to establish the origin of the audience according to the Index of Multiple Deprivation\(^6\).

The 1\(^{st}\) quintile indicates the proportion of those living in the least deprived areas of the UK, and the 5\(^{th}\) quintile indicates the proportion of those living in the most deprived areas.

As in previous years, we can see that the AV Festival audience come from relatively more deprived areas than the national average. This is consistent with the large proportion of attendees from the North East, which has high overall levels of deprivation within the UK. This is also replicating the deprivation distribution recorded in previous years of the Festival. Arts participation is higher among those with higher relative wealth than the population at large\(^7\), implying that AV Festival's audience are in general less affluent than a typical arts audience.

“Good theme, brings interesting work to an audience that may not be exposed to such content regularly. AV Festival 2016 visitor

\(^6\) The Index of Multiple Deprivation are generated by the UK Government to establish levels of poverty and take into account income, education, health, employment, housing, crime and living environment.

\(^7\) https://www.gov.uk/government/collections/taking-part

![Figure 28 - Audience origin by Index of Multiple Deprivation quintiles (2012-2016)](image)

Source: BOP Consulting (2016)

We are also able to use postcode data to tell what type of neighbourhood respondents live in. It suggests that AV Festival's audience is heavily urban (whether from the North East or not), with 92% living in major conurbations or towns and cities. This is a very similar pattern to the previous two editions of the Festival.
<table>
<thead>
<tr>
<th>Urban/Rural Classification</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural: Hamlets and Isolated Dwellings</td>
<td>0.4%</td>
</tr>
<tr>
<td>Rural: Hamlets and Isolated Dwellings in Sparse Settings</td>
<td>0.9%</td>
</tr>
<tr>
<td>Rural: Town and Fringe</td>
<td>3.8%</td>
</tr>
<tr>
<td>Rural: Town and Fringe in a Sparse Setting</td>
<td>0.4%</td>
</tr>
<tr>
<td>Rural: Village</td>
<td>0.9%</td>
</tr>
<tr>
<td>Rural: Village in a Sparse Setting</td>
<td>0.4%</td>
</tr>
<tr>
<td>Urban: City and Town</td>
<td>10.7%</td>
</tr>
<tr>
<td>Urban: Major Conurbation</td>
<td>81.6%</td>
</tr>
<tr>
<td>Urban: Minor Conurbation</td>
<td>0.9%</td>
</tr>
</tbody>
</table>

Source: BOP Consulting (2016)
Appendix

Economic impact assessment methodology

AV Festival commissioned BOP Consulting to quantify the economic contribution that the Festival makes to the North East region. To do this, BOP combined the findings of surveys of AV Festival 2016 visitors with a robust, HM Treasury-approved methodology to calculate the economic impact of the Festival within the North East.

BOP has followed the Impact Evaluation Framework (IEF) methodology, which is accepted as the ‘public sector standard’ robust methodology for calculating economic impacts. The IEF was developed to evaluate the impacts of national government and Regional Development Agency-backed interventions, based on the recommendations of HM Treasury’s Green Book. IEF impact assessments typically focus on:

- The quantitative impacts that can be reliably attributed to the intervention – net impacts taking account of deadweight, displacement, leakage, and substitution effects plus multipliers to estimate the effect of secondary economic activity occurring as a result; and
- The improvement in employment and productivity among the beneficiaries affected by the intervention (Gross Value Added or GVA outcomes).

The IEF method thus tries to make sure that an impact study is only measuring the genuinely ‘additional’ impact of an event. If the spending would have happened in the region anyway, then nothing is being added to the regional economy – money is simply being re-directed from one spending opportunity (such as a local cinema) to another (a local festival).

The IEF method is more robust than certain other methods which are used within the cultural sector, such as the ‘Shellard’ method, which has been criticised for not taking account of deadweight, displacement, leakage and substitution effects, and for applying a generic (and optimistic) multiplier rather than a specific multiplier to estimate

To inform the calculation, BOP gathered data on two streams of expenditure:

- First, the goods and services bought by AV Festival from suppliers within the city and the region and from its employees (in the form of wages)
- Second, the spending of AV Festival visitors at other establishments in the city and the region. This might be hotel accommodation, shopping or meals in restaurants, for example.

The two main data sources were:

- AV Festival’s accounts, to determine the total spend within the North East resulting from its operations
- Surveys of visitors carried out during and following the 2016 Festival. A total of 397 valid responses were received, with responses collected online and through paper forms. The survey touched on many aspects of the visitors’ experience of the Festival, including their spending.

Combining the data from these expenditure streams gives the gross economic impact of AV Festival 2016 – in other words, the total volume of economic activity associated with the Festival, in the city of Newcastle and in the North East.

The next stage is to identify the value of economic activity in the city and region that can be directly credited to AV Festival 2016 (known as the net economic impact). The impact methodology used here tries to make sure that the study is only measuring the genuinely ‘additional’ impact of an event. The gross economic impact figures are therefore adjusted to take account of four additionality effects: displacement, deadweight, substitution and leakage.

However, the recipients of the spending created by AV Festival re-spend much of that income within the region. This in turn creates further demand for goods and services, ‘multiplying’ the effects of the original spending. Standard economic impact methodology adjusts for this through the use of government-calculated multipliers.
The next figure defines the four additionality effects and sets out the methodological steps taken to derive the net economic impact.

Audiences had a number of opportunities to fill in a survey. AV Festival volunteers asked people to fill in a paper copy of the survey as they left events or exhibitions. This was followed up with online versions of the survey sent to attendees for whom AV Festival had email records. (People were asked not to complete the online survey if they had already completed the paper survey.) The paper survey conducted by volunteers and the various online audience surveys were to all intents and purposes identical, with only minor differences in wording to reflect the different contexts in which they were completed. The results of the surveys have therefore been combined in order to produce a total sample of 397 valid responses – a sufficiently large sample for the survey findings to be considered statistically robust.

This summary of spending by AV Festival is derived from management accounts prepared by AV Festival staff for the years 2014/15 and 2015/16. In particular, they have identified spending within Newcastle and within the North East as a share of total spending.
## Additionality effects at North East level

<table>
<thead>
<tr>
<th>Additionality effect</th>
<th>Definition</th>
<th>Scaling factor</th>
<th>Rationale</th>
<th>Coefficient for net output calculation</th>
<th>Applied to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadweight</td>
<td>The proportion of total outcomes that would have been secured anyway without the intervention in question</td>
<td>0.51</td>
<td>This proportion of visitors who come to AV Festival from outside the region are attracted (at least in part) by the festival itself. The remainder effectively aren't visiting due to AV.</td>
<td>0.49</td>
<td>Just gross economic spend by visitors from outside NE</td>
</tr>
<tr>
<td>Leakage</td>
<td>The proportion of total outcomes that benefit those outside the target area of the intervention (e.g. spend with local suppliers that subsequently leaks out of the local area)</td>
<td>0.05</td>
<td>‘Standard’ median leakage scaling factor for a programme intervention at regional level (source: BIS OCCASIONAL PAPER NO 1, Table 5.2)</td>
<td>0.95</td>
<td>All gross economic impacts</td>
</tr>
<tr>
<td>Displacement</td>
<td>The proportion of total outcomes that are reduced elsewhere in the target area typically among other business (i.e. ‘cannibalisation of spending from other local businesses)</td>
<td>1</td>
<td>We assume that NE residents would spend their money elsewhere in the region if the AV Festival were not there. Hence we discounted all spend by NE residents.</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Substitution</td>
<td>This effect arises where, say, a firm substitutes a jobless person to replace an existing worker to take advantage of the public sector assistance.</td>
<td>0</td>
<td>No substitution incentive or activity – not applicable</td>
<td>1</td>
<td>All gross economic impacts</td>
</tr>
<tr>
<td>Multipliers</td>
<td>Further or secondary economic activity associated with additional income to those employed by the project (income multipliers), with local supplier’s purchases (supplier multipliers) and with longer term development effects.</td>
<td>1.4</td>
<td>‘Standard’ median multiplier for a programme intervention at regional level (source: BIS OCCASIONAL PAPER NO 1, Table 7.2)</td>
<td>1.4</td>
<td>All gross economic impacts</td>
</tr>
</tbody>
</table>
## Additionality effects at Newcastle level

<table>
<thead>
<tr>
<th>Additionality effect</th>
<th>Definition</th>
<th>Scaling factor</th>
<th>Rationale</th>
<th>Coefficient for net output calculation</th>
<th>Applied to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadweight</td>
<td>The proportion of total outcomes that would have been secured anyway without the intervention in question</td>
<td>0.33</td>
<td>This proportion of visitors who come to AV Festival from outside the city are attracted (at least in part) by the festival itself. The remainder effectively aren't visiting due to AV.</td>
<td>0.67</td>
<td>Just gross economic spend by visitors from outside Newcastle</td>
</tr>
<tr>
<td>Leakage</td>
<td>The proportion of total outcomes that benefit those outside the target area of the intervention (e.g. spend with local suppliers that subsequently leaks out of the local area)</td>
<td>0.09</td>
<td>‘Standard’ median leakage scaling factor for a programme intervention at sub regional level (source: BIS OCCASIONAL PAPER NO 1, Table 5.1)</td>
<td>0.91</td>
<td>All gross economic impacts</td>
</tr>
<tr>
<td>Displacement</td>
<td>The proportion of total outcomes that are reduced elsewhere in the target area typically among other business (i.e. ‘cannibalisation of spending from other local businesses)</td>
<td>1</td>
<td>We assume that city residents would spend their money elsewhere in the city if the AV Festival were not there. Hence we discounted all spend by city residents.</td>
<td>0</td>
<td>All gross economic impacts</td>
</tr>
<tr>
<td>Substitution</td>
<td>This effect arises where, say, a firm substitutes a jobless person to replace an existing worker to take advantage of the public sector assistance.</td>
<td>0</td>
<td>No substitution incentive or activity – not applicable</td>
<td>1</td>
<td>All gross economic impacts</td>
</tr>
<tr>
<td>Multipliers</td>
<td>Further or secondary economic activity associated with additional income to those employed by the project (income multipliers), with local supplier’s purchases (supplier multipliers) and with longer term development effects.</td>
<td>1.21</td>
<td>‘Standard’ median multiplier for a programme intervention at sub regional level (source: BIS OCCASIONAL PAPER NO 1, Table 7.1)</td>
<td>1.21</td>
<td>All gross economic impacts</td>
</tr>
</tbody>
</table>