



Kirklees Council

An Economic Impact Assessment
of Kirklees Events

Final Report

December 2008

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Introduction

Kirklees Council has been increasingly aware of the importance of festivals and events in bringing economic benefit to the area. The council has adopted a two pronged approach to events with a major events strategy and a community events programme. There are a number of reasons that the council supports events in the area. Firstly there is the economic benefit that is brought to the area. There is a growing realisation that major events can serve to provide a real opportunity to showcase an area, they bring people in as visitors and they raise the profile of the area both as a vibrant destination to visit and as a location for potential investors and developers to consider. Secondly there is the community cohesion aspect to the events strategy. The major events attract thousands of people to them and the community events programme has seen increased investment as it recognises the major impact that they have on communities within Kirklees.

Purpose of the Report

This report was compiled following a piece of primary research which has been commissioned from Spirul Ltd by Kirklees Council. The primary purpose of the report is to assess the economic impact of the 6 festivals and events, which formed the basis of the study, on Kirklees. It should be remembered that the festivals and events not only create an economic impact but also impact on issues such as social and community cohesion and external perceptions of the area. The question areas explored within this study are primarily focused on economic impact, however it does provide some feedback on the social and community impact. The extent to which this study can provide a definitive commentary on these issues is limited and we would recommend further research to explore the social and community impacts of the festivals. The festivals and events involved in the study are:

- Cleckheaton Folk Festival;
- Huddersfield Contemporary Music Festival (HCMF);
- Huddersfield Carnival;
- Imbolc;
- Marsden Jazz Festival; and
- Moonraking.

The findings of this report will be used to:

- Position culture and leisure events more prominently with other internal Kirklees Council departments – primarily Economic Development, Safer Stronger Communities Service and Highways and Transportation Services;

- Provide a key element in discussions with external bodies such as the Arts Council England, Yorkshire Forward and Yorkshire Tourist Board;
- Provide a key element in discussions with the wider business community of Kirklees; and
- Provide a baseline of information for understanding and allocating funding to events and festivals in Kirklees.

Structure of the Report

This report is structured to present the overall economic impact of the 6 festivals and events in the main body. The findings for each individual event are presented in 6 complimentary reports. Each report is structured in the same way and shows the following sets of results:

- Audience profile –
 - Age;
 - Gender;
 - Ethnic group;
 - Dependent children;
 - Distance travelled;
 - Mode of transport;
 - Length of stay (for individual events only);
 - Size of group;
 - Visitor satisfaction;
 - Previous attendance;
 - Festival awareness; and
 - Overnight stay.
- Stakeholder views –
 - Type of business;
 - Importance of festival to business;
 - Business activity;
 - Staff and opening hours;
 - Social impact and support;
- Economic impact –
 - Analysis of direct, indirect and induced economic impact.

Methodology

The data collection project took place over the period from October 2007 to July 2008. In compiling the report we have used a variety of research techniques and methodologies that reflected the differing natures and duration of the festivals and events. The methodologies utilised are listed below:

- Visitor survey – the visitor survey used a core set of questions for each event to ensure that results are comparable. Each event had additional questions at the request of the event organisers. In total 1144 visitor questionnaires were completed. The survey was carried out via a mixed approach as detailed below:
 - Face to face interviews carried out by experienced interviewers during the festivals. Each interview took approximately 10 minutes to complete. This methodology was used at HCMF, Marsden Jazz Festival and Cleckheaton Folk Festival ;
 - Self completion questionnaires left at venues. Each questionnaire incorporated a reply paid envelope for return or was handed in at a central festival office or hub. This approach was adopted at HCMF, Marsden Jazz Festival and Cleckheaton Folk Festival. Questionnaires were also left at the Imbolc and Moonraking workshops in the build up to the main event;
 - Self completion questionnaires handed out at events. This methodology was adopted at Huddersfield Carnival, Imbolc and Moonraking. Each questionnaire incorporated a reply paid envelope for return.
- 127 businesses were interviewed either face to face or by telephone in the week after each event;
- Information from festival organisers has also been gathered. At the stage of writing information on organiser spend was available from Cleckheaton Folk Festival, HCMF and Moonraking;
- An attempt, employing a widely accepted methodology, has been made to estimate the impact of the events on the Kirklees economy.

Background

This piece of research was commissioned by Kirklees Council to evaluate the economic impact of 6 festivals and events within the area. Each of the 6 events is briefly introduced in this section.

Cleckheaton Folk Festival

In July 2008 Cleckheaton Folk Festival celebrated its 21st birthday. It takes place annually in the first weekend of July. The festival attracts many well known folk performers and takes place in a variety of venues around Cleckheaton. In 2008 some new venues were added and the festival also incorporated a craft fair and outdoor entertainment. Unfortunately the weather thwarted some of the enjoyment but the parade was able to take place. The festival attracts a wide selection of artists including: The Wilson Family; Bernard Wrigley; Dave Webber & Anni Fentiman; Isambarde; Pete Ryder; Anne Curran; Bandersnatch; Soundsphere; Shellback Chorus; and Kimbers Men.

Huddersfield Carnival

Huddersfield Carnival is the second largest African-Caribbean Carnival in West Yorkshire and is larger than some of the North's major cities' Carnivals. The Carnival is always held on the second weekend in July and it pulls in Carnival goers from all over the country and the world and serves a local African-Caribbean population numbering 16,000 – which is one of the largest in the region. Now entering its 23rd year the event is a well established part of many people's summer. The Carnival took place over 2 days with the main event taking place on Saturday 12 July. The Carnival began with the Carnival Queen Show on the Friday night. The main Carnival Parade took place on the Saturday and followed a route through Huddersfield town centre to Greenhead Park where a main stage presented bands and visitors could visit stalls and an amusement fair.

Huddersfield Contemporary Music Festival (HCMF)

HCMF is an annual, international festival of contemporary and new music. It takes place over 10 days and consists of approximately 50 events, including concerts, music-theatre, dance, multi-media, talks and film, with a related Education and Outreach programme devised and implemented to reflect the programme and respond to regional need. The festival takes place in November and is an internationally recognised and renowned event. The festival commissions and programmes approximately 10 new compositions each year.

Imbolc

The Marsden Imbolc Festival began in 1993. It takes place on the 1st of February and is a celebration of the ancient fire festival of Imbolc, one of four fire festivals that underpin the Celtic calendar in the British Isles. The festival incorporates a procession through Marsden leading to a fire 'circus' and firework display. It is a strong community event that, although it takes place in the winter, brings out good crowds to witness the procession and displays.

Marsden Jazz Festival

Marsden Jazz Festival takes place in October and makes use of some 20 venues in the town. The festival is now in its 17th year and over the weekend it hosted over 60 events. Many of the performances were free and it attracts some of the biggest names in Jazz and Blues. As with Imbolc it has a strong community feel to it and whilst it is on the streets of Marsden are busy with visitors enjoying the wide variety of performances.

Moonraking

The Moonraking legend is part of the folk culture in the village of Slaithwaite, West Yorkshire. For 22 years local people have celebrated the tale through The Moonraking Festival, an annual lantern event working with professional community artists in the February half term week. In 2008 the programme featured:

- The theme of Legends;
- Theatrical Barn Dance, participatory dancing interwoven with story cabaret, opening the festival;
- Story Performance Programme for children and families;
- A roving story-teller animating street corners, park benches and footpaths;
- A Crick Crack night of Tales and Ales for adults including an open mic. event for Tall Tales;
- Story animation workshops for teenagers producing short films to be screened at the festival finale;
- Costume making for those taking part in the Moonraking enactment and procession; and
- Restructured finale enacting the Moonraking story.

Key Findings of the Surveys – Overall Findings

This section of the report will bring together the key findings from the 1144 completed visitor questionnaires and 127 business questionnaires. The visitor questionnaires and business questionnaires were completed in 2 ways:

- Visitor surveys -
 - Face to face interviews completed by experienced interviewers. Random samples of visitors were interviewed at various points and times during Cleckheaton Folk Festival, HCMF and Marsden Jazz Festival. The interviewers were instructed to achieve an equitable balance regarding age, gender and ethnicity;
 - Self completion questionnaires – visitors were either handed questionnaires or picked them up at event venues to return by post or hand in at central points.
- Business questionnaires –
 - Face to face interviews completed by experienced interviewers in the week following the event;
 - Telephone interviews completed as above.

Where figures do not total 100% this may be due to multiple responses, not answered/unspecified responses or computer rounding.

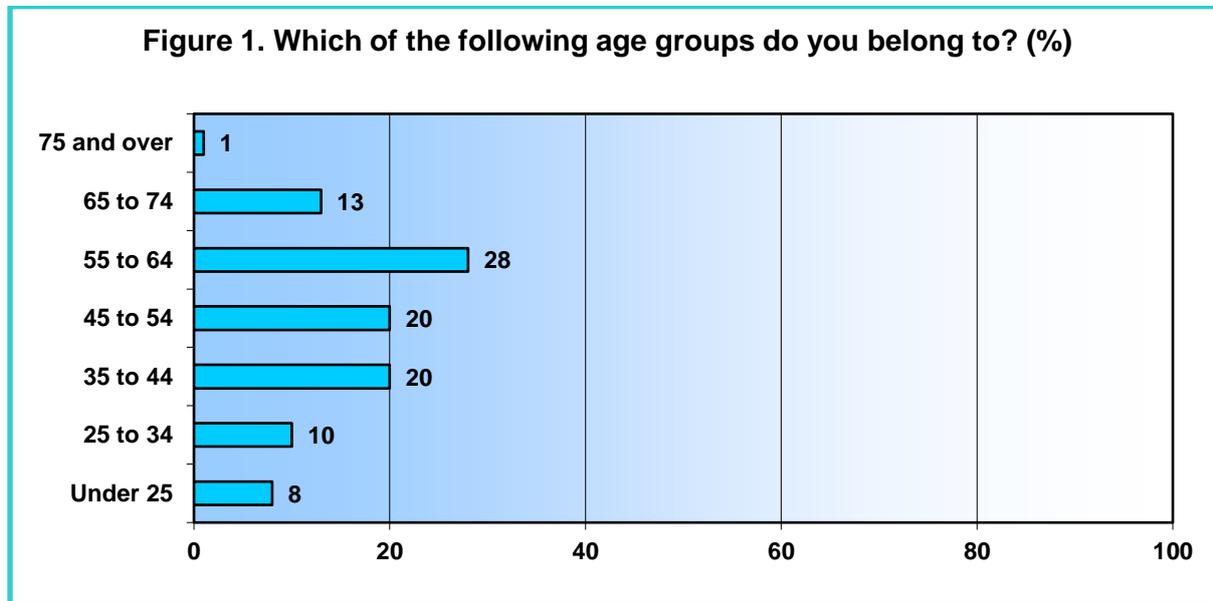
Visitor Profile

The responses gathered during the survey period have revealed some of the key features of the audiences that are attracted to the festivals and events. This is important in understanding the appeal that the festivals and events have and in determining the overall economic impact that the Kirklees economy derives from them.

Age

Overall the audiences for the festivals were generally older with 62% aged 45 and over and only 38% 44 and under. The largest representation is the 55-64 years with 28% of the respondents. These figures however are influenced by the results from the Cleckheaton Folk Festival and Marsden Jazz Festival that generally attract an older audience.

The age profile of the individual festivals is quite distinctive with Cleckheaton Folk Festival (80.9%) and Marsden Jazz Festival (76%) reflecting the overall results with a predominantly older audience of over 45; HCMF (51%:49%) and Moonraking (50.4%:49%) having a relatively even split between visitors over 45 and those under 45; and Huddersfield Carnival (42%) and Imbolc (46%) having a minority of over 45 years.



It is noticeable that the 3 festivals where the main event is held on a single day and involves a parade; Huddersfield Carnival, Imbolc and Moonraking had the largest representation in the 35-44 years at 27%, 32% and 29% respectively. This may be because these festivals are perceived as family events.

Cleckheaton Folk Festival and Marsden Jazz Festival have the greatest representation in the 55-64 years group at 49% and 33% respectively. HCMF has a fairly even spread with the under 25 and 45-54 years being equal at 23% as the largest representative groups.

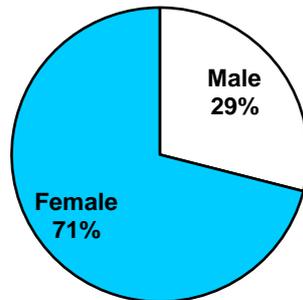
Gender

Overall 71% of festival visitors were female and 29% were male where a valid response was given. More women than men completing research questionnaires may have influenced this. It was noticeable at the events that men avoided being asked to complete a questionnaire or if they were accompanying a woman then they tended to leave her to complete it. When questionnaires were handed out it was also noticeable that more women were willing to take one for self completion.

The overall figures are most represented at the 3 non music festivals; Huddersfield Carnival (82%:18%), Imbolc (63%:37%) and Moonraking (73%:27%) which have a higher female to male profile possibly reflecting the greater attraction for families to these events. The 3 music festivals had a much more even ration with Cleckheaton

Folk Festival at 55%:45%, HCMF at 40%:60% and Marsden Jazz Festival at 51%:49%.

Figure 2. Are you male or female? (%)

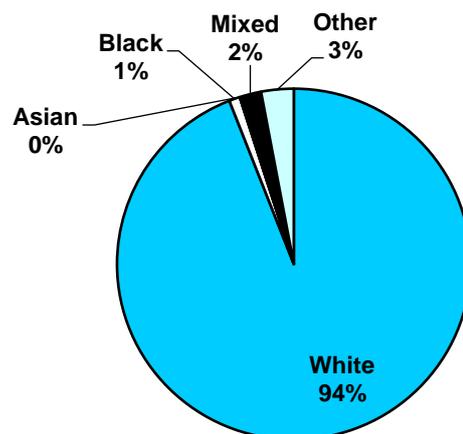


Ethnic Group

The majority of festival goers were White at 94%. Huddersfield Carnival is the only event that differed markedly from the overall figures with 62% White, 30% Black or Mixed Black and 8% other ethnic.

This may be expected as the Huddersfield Carnival is the second largest African Caribbean Carnival in West Yorkshire and serves a local African Caribbean population of 16,000, one of the largest in the West Yorkshire region.

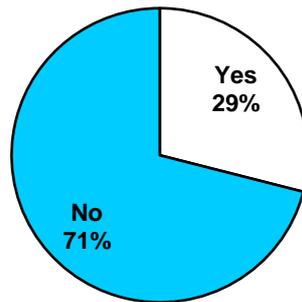
Figure 3. How would you describe your ethnic origin? (%)



Dependent Children

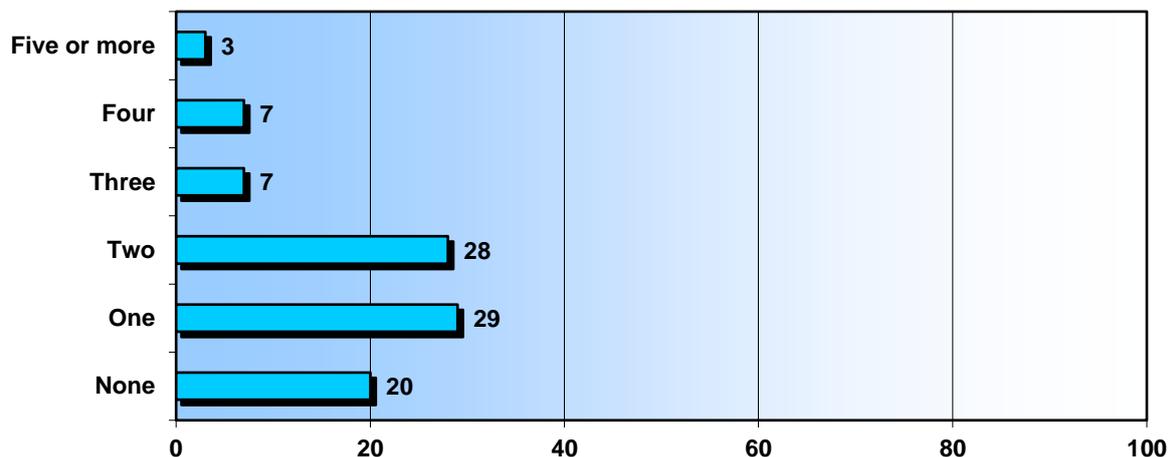
Overall only 29% of the visitors had dependent children. This tends to match the results for the age profile attracted to the events.

Figure 4. Do you have any dependent children? (%)



Of those with dependent children 74% had brought them to the event. The number of children brought to an event was predominantly 1 or 2 with 29% and 28% of the responses respectively.

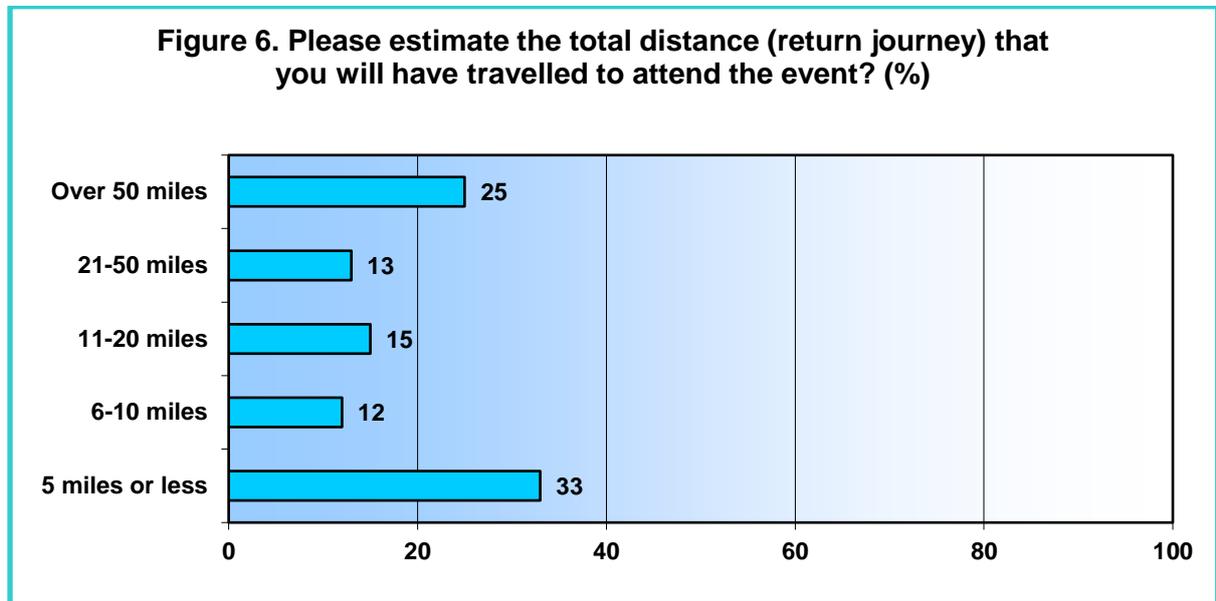
Figure 5. How many are here with you today? (%)



Distance Travelled

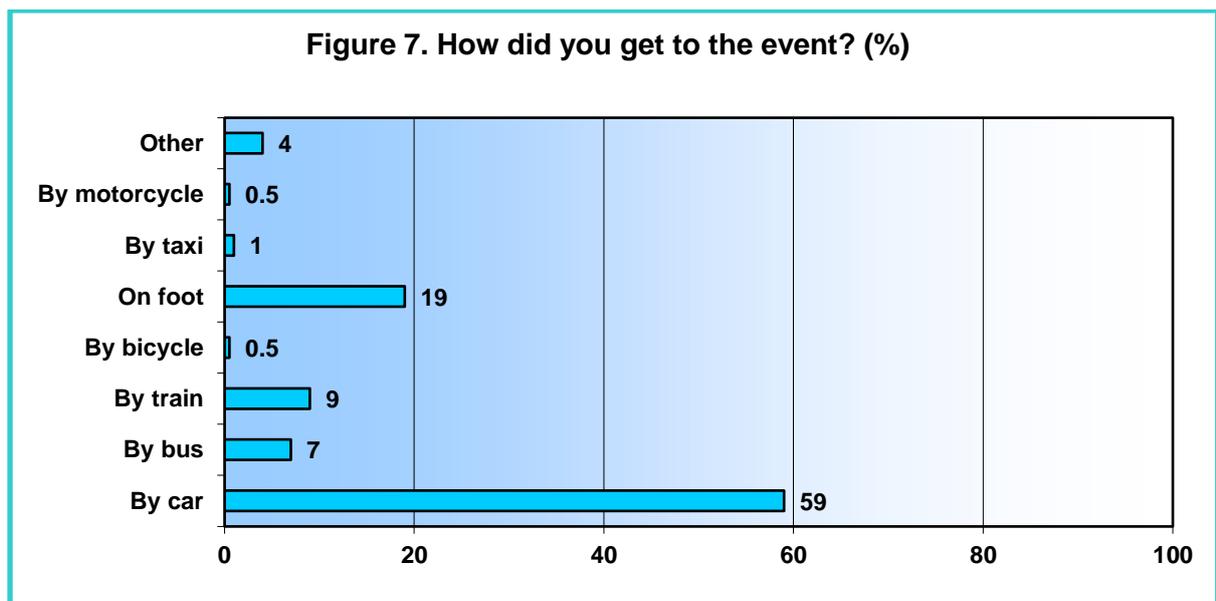
Audiences for the 6 events were generally local or sub-regional and generally travelled less than 50 miles as a round trip. There is still however a significant level of visitors, 25%, attracted from a 50 mile plus return journey. Huddersfield Carnival, Imbolc and Moonraking had the majority of their audiences from within a 10 mile

return journey; 79%, 56% and 72% respectively reflecting the local appeal of the events. As with the other categories there is a distinct difference with the 3 music festivals as they drew an audience from further afield with Cleckheaton Folk Festival (50%), HCMF (51%) and Marsden Jazz Festival (50%) bringing in visitors from a 21 mile plus return journey and indeed bringing in significant numbers from a 50 miles plus return journey (35%, 43% and 33% respectively).



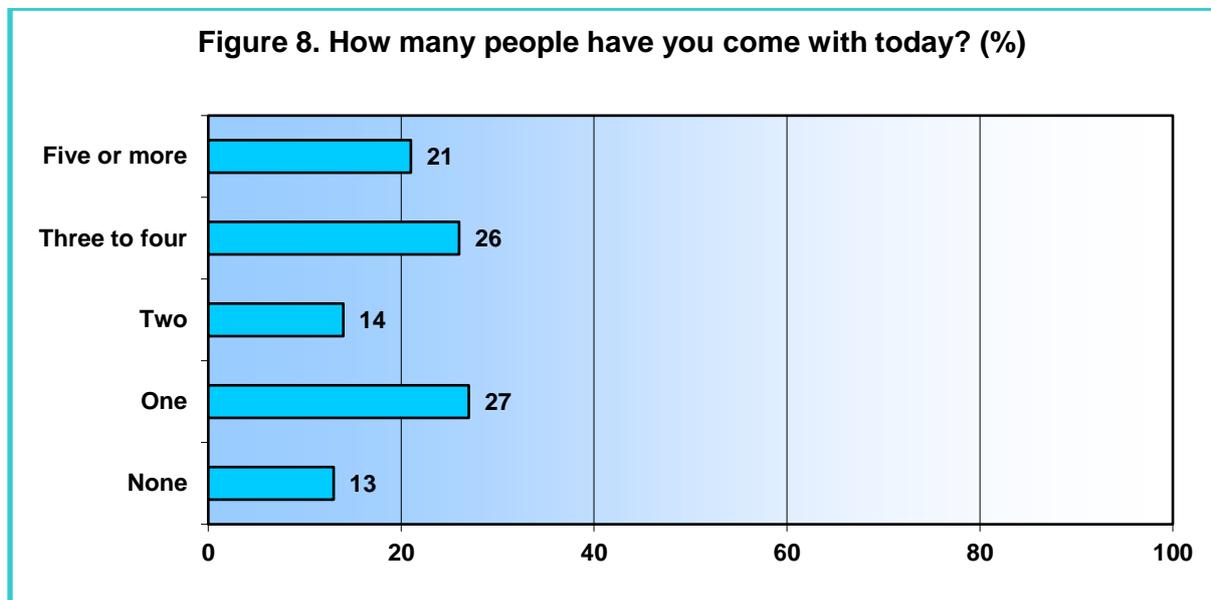
Mode of Transport

The majority of visitors attended the events by car (59%), with the only other significant mode of attendance being those that attended on foot (19%). Buses, trains and taxis accounted for 17% of the journeys.



Size of Group

The events appear to be a social activity with 88% of people attending with at least one other person. A significant number (47%) attended in groups of 3 or more.

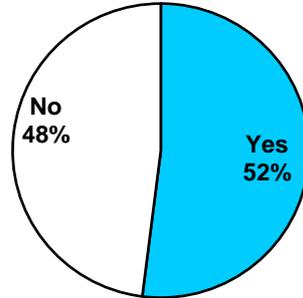


The social aspect is particularly noticeable at the 3 non music events with 54%, 67%, and 71% respectively at Huddersfield Carnival, Imbolc and Moonraking attending in groups of 3 or more. This probably reflects the roots of these events in the local communities.

In contrast the 3 music festivals attracted 61%, 74% and 38% respectively at Cleckheaton Folk Festival, HCMF and Marsden Jazz Festival of lone attendees or one person attending with them.

Of those attending with one or more person it is a fairly even split if they are all local in the group or not. Again the 3 non music events are predominantly local within the groups at 74% Huddersfield Carnival, 54% Imbolc and 64% Moonraking. Cleckheaton Folk Festival, HCMF and Marsden Jazz Festival, as reflected in the distance travelled, had smaller groups of which 62%, 66% and 50% respectively were not based locally.

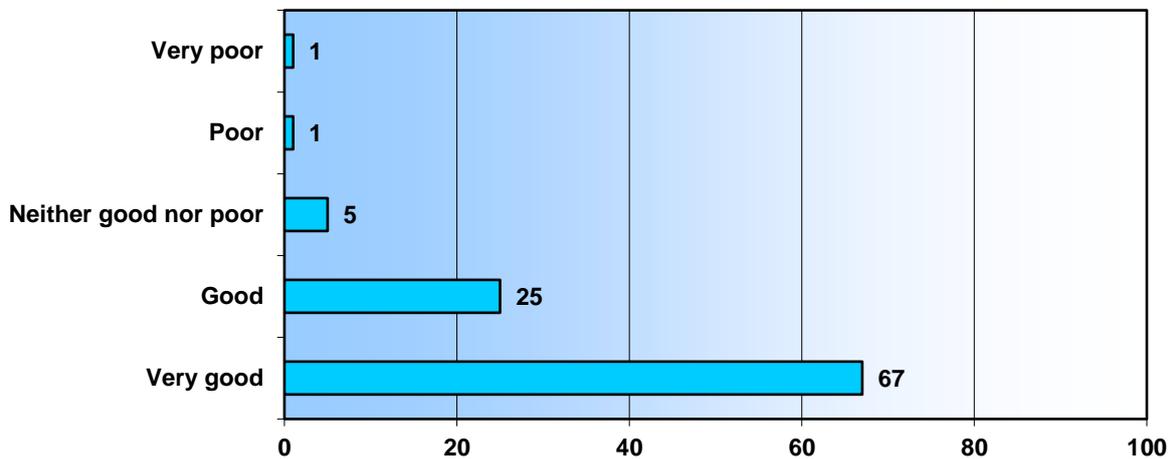
Figure 9. If you have come with other people today, are they all local? (%)



Visitor Satisfaction

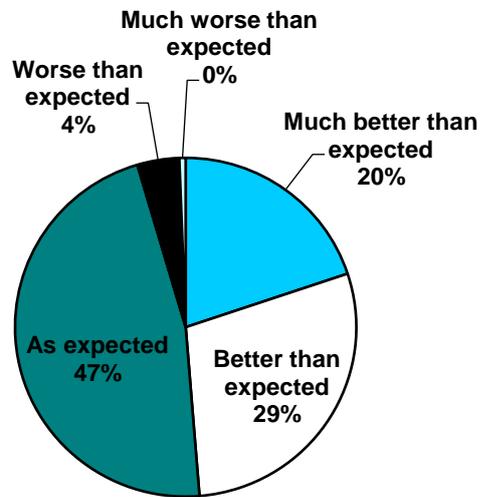
Overall there is an exceptionally high satisfaction with the events with 92% of visitors rating them as good or very good. In fact the predominant rating is very good with 67% of visitors giving this rating. Only 2% of visitors rated the events as poor or very poor. All of the events had high ratings for satisfaction with Huddersfield Carnival at 76% good or very good the lowest.

Figure 10. Overall how would you rate the event? (%)



The encouraging factor in the levels of satisfaction is that 46% of visitors found the events to be as expected, suggesting that the events deliver on the levels of entertainment that were either known beforehand or anticipated prior to the festival or event. Although people seem to have high expectations of the events 49% of visitors still found them to be better or much better than expected.

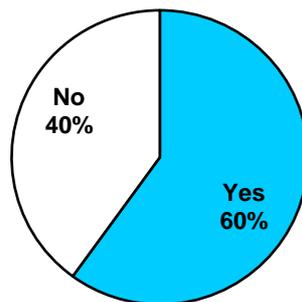
Figure 11. How does the event measure up to your expectations? (%)



Previous Attendance

The level of satisfaction brings people back to the events with 60% of the visitors having attended in previous years. The exceptions to this were Moonraking (41%) and Imbolc (42%) where the majority had not previously attended.

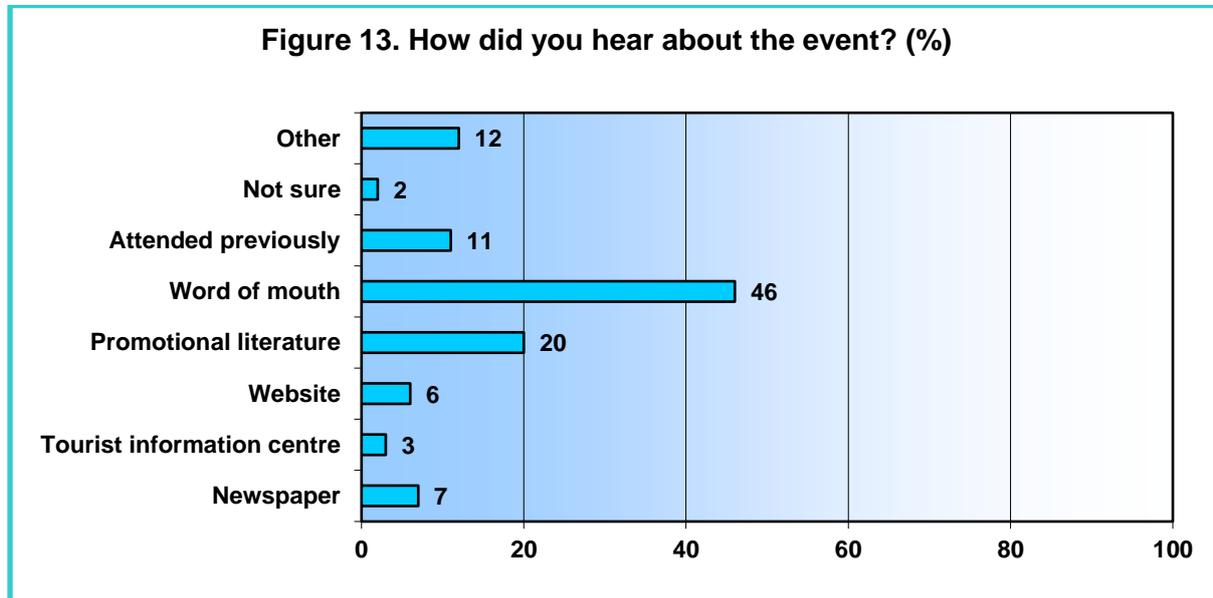
Figure 12. Have you attended in previous years? (%)



With 40% of visitors having not previously attended it suggests that the festivals are able to draw in new visitors.

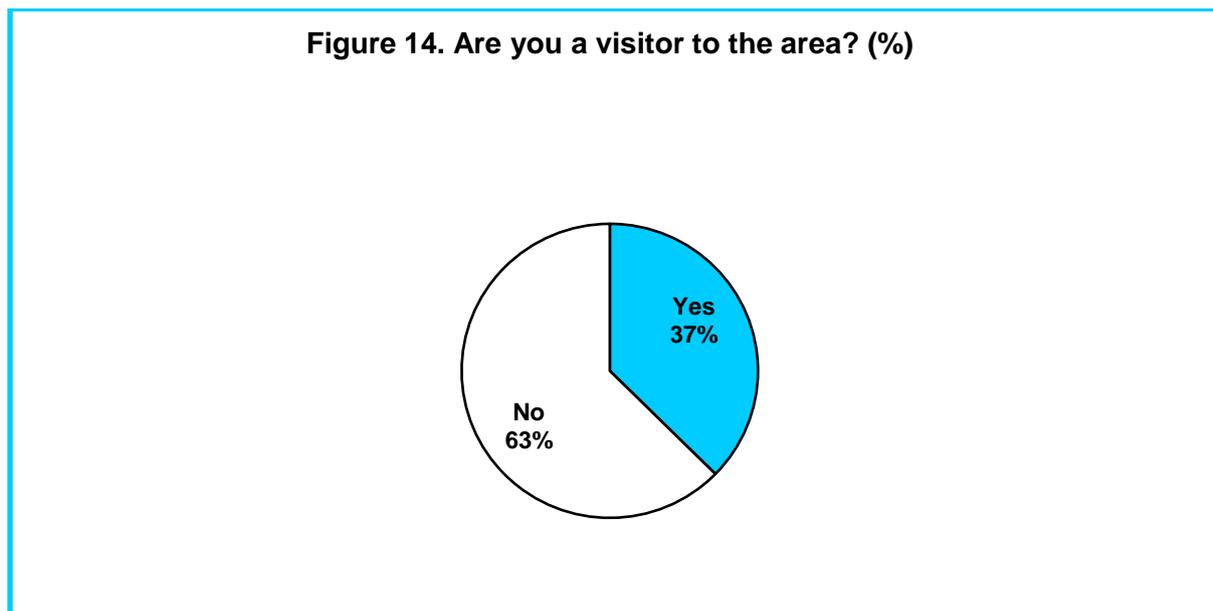
Festival Awareness

Word of mouth is the most significant mechanism for visitors hearing about the event with 46% of respondents. The next most significant with 20% is promotional literature.



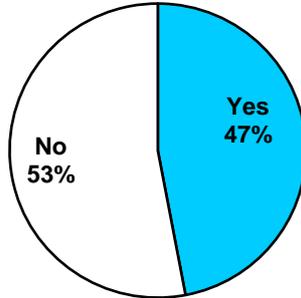
Overnight Stay

Overall 37% of people were visitors to the area. The 3 music festivals attracted more visitors at 56% Cleckheaton Folk Festival, 54% HCMF and 39% Marsden Jazz Festival. Huddersfield Carnival at 11% had the lowest number of visitors to the area and Imbolc at 30% and 22% Moonraking again reflecting the local community roots of the 3 events.



Of those that were visiting the area 47% were staying overnight.

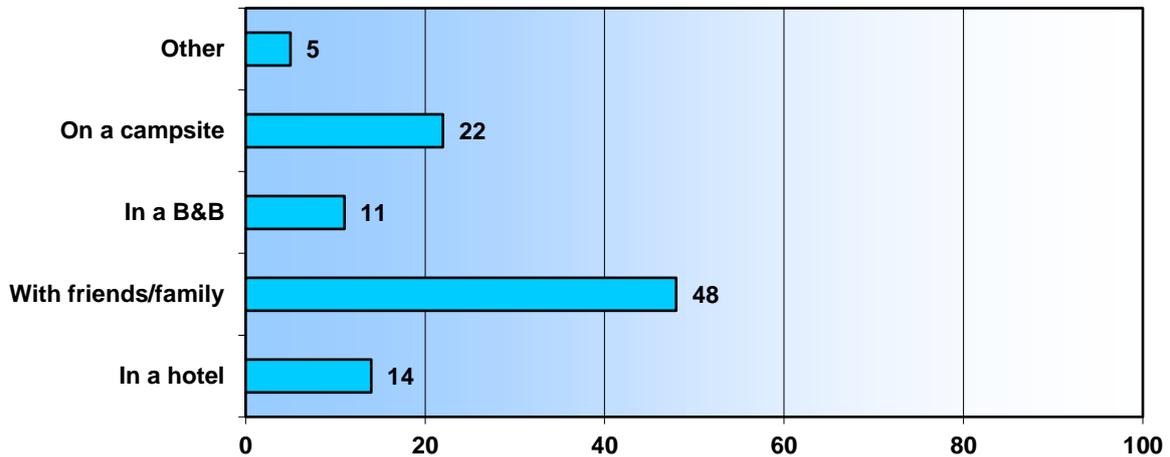
Figure 15. Are you staying overnight in the area? (%)



Reflecting the nature of the events and the duration of them it is the 3 music festivals that attract the majority of those staying overnight with 62%, 64% and 45% of people visiting the area staying at Cleckheaton Folk Festival, HCMF and Marsden Jazz Festival respectively.

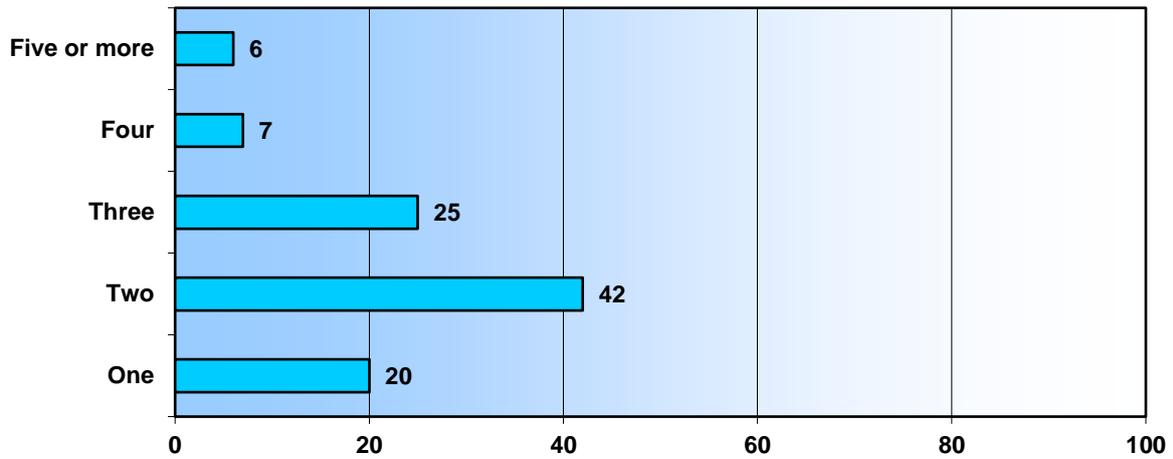
Of those visitors staying 48% stay with family and friends again reflecting the social nature of the events.

Figure 16. If yes are you staying ... (%)



It is significant that 80% of visitors are staying for 2 or more nights, with a 2 night stay at 42% the most popular duration.

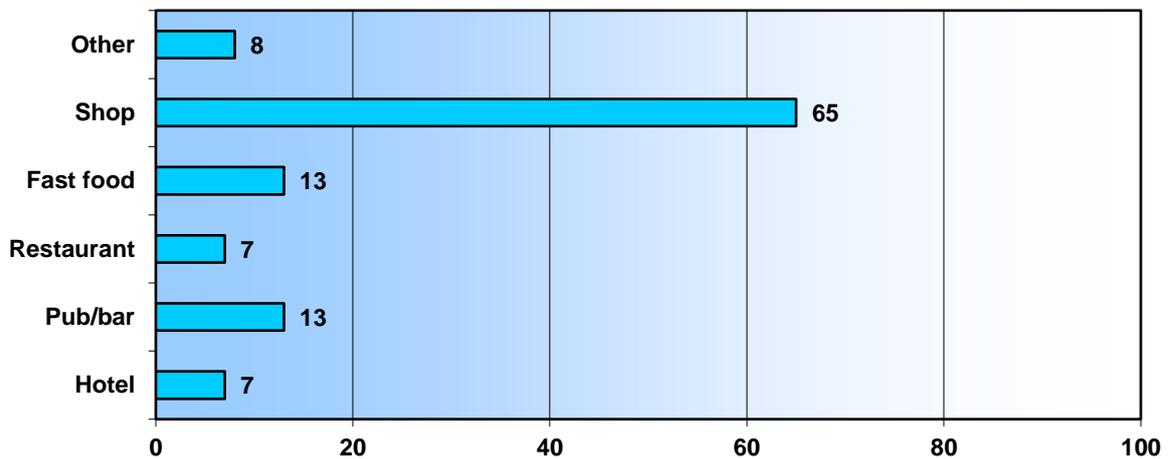
Figure 17. How many nights are you staying? (%)



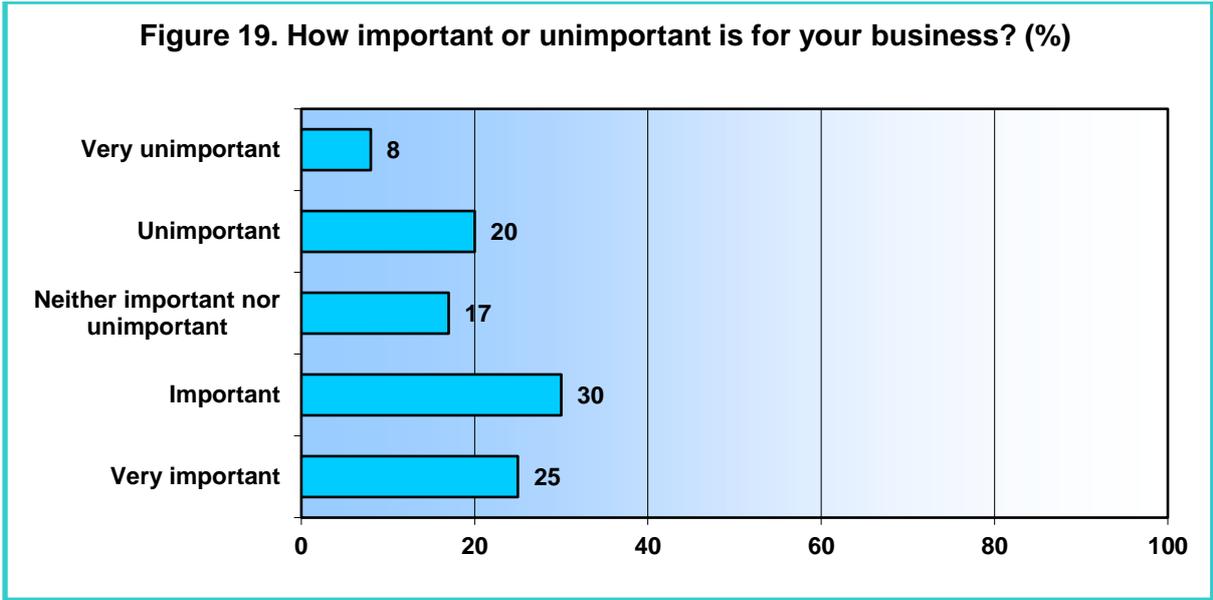
Business Survey

A survey of businesses was carried out in the week following each event. The businesses surveyed were primarily retail, hotels or accommodation, fast food outlets, pub/bar or restaurants. The surveys were carried out either face to face or by telephone. In total 127 businesses were surveyed.

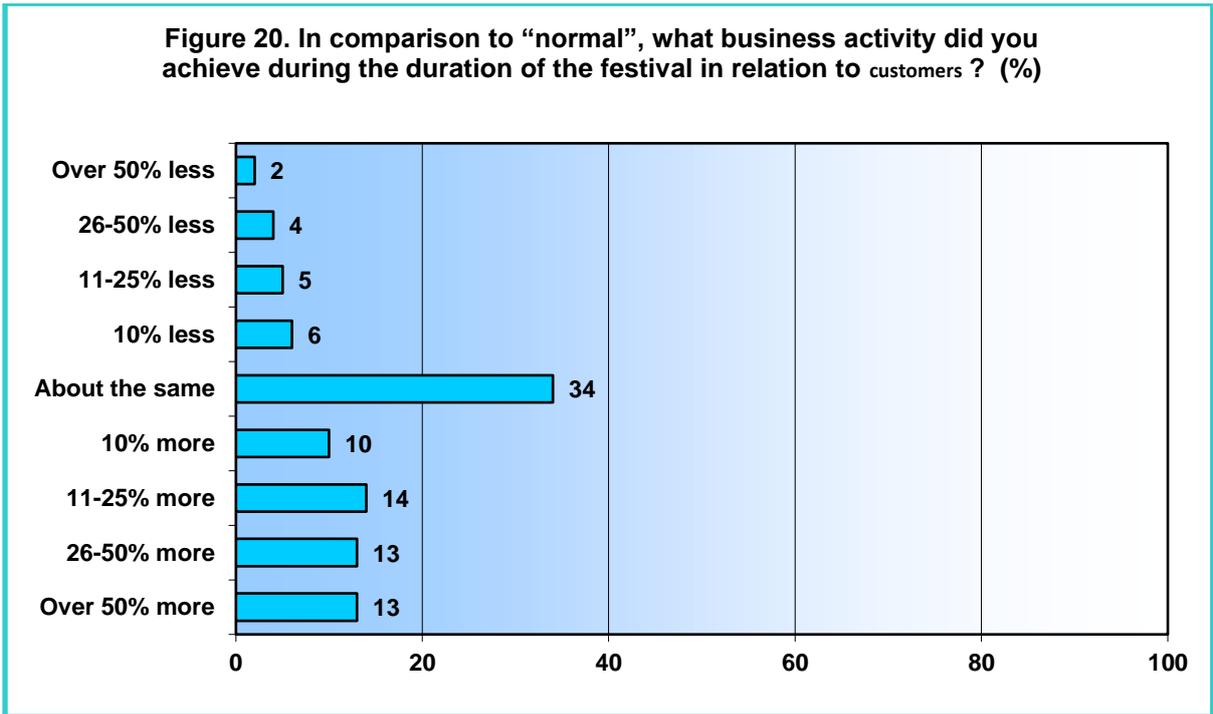
Figure 18. What type of business are you? (%)



When asked how important the event was for their business 55% rated them as important or very important.

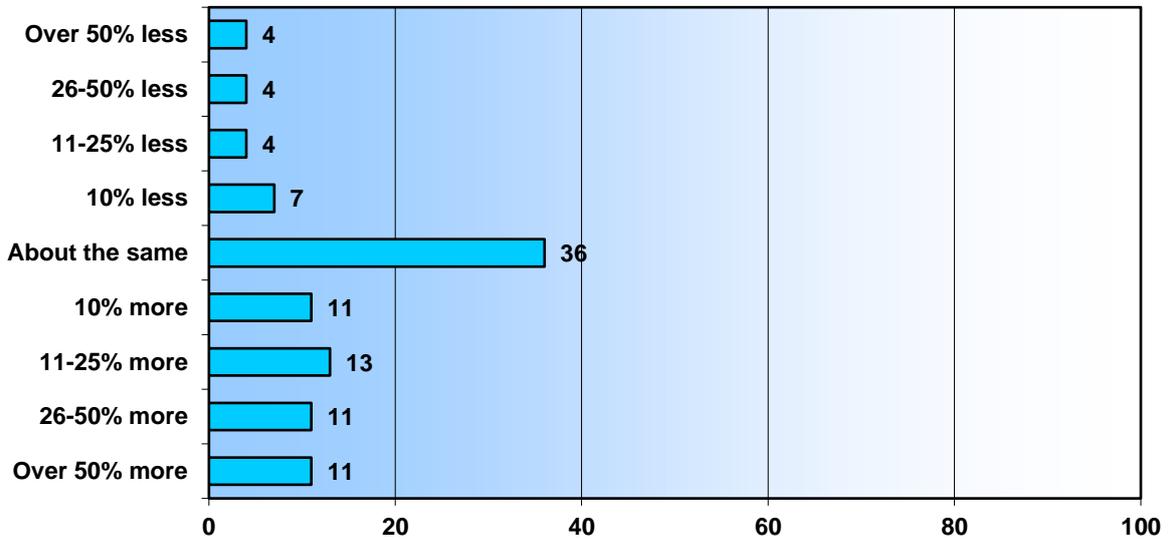


The events are potentially good sources of income and 50% of businesses experienced higher than normal levels of customers compared to only 16% that experienced lower than levels of customers.



The higher levels of customers is translated into higher turnover with 46% of businesses getting increased revenue as a result of the event taking place, compared to 19% that experienced a fall in revenue.

Figure 21. In comparison to “normal”, what business activity did you achieve during the duration of the festival in relation to turnover ? (%)



One of the direct benefits of the events is that they support additional jobs in the businesses whilst they take place with 78% of the businesses surveyed taking on additional staff to cope with the increased levels of customers and extended opening hours. 86% of businesses extended their opening hours during the festivals and events.

Figure 22. Did you employ additional staff during the duration of the festival? (%)

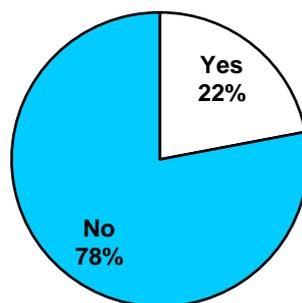
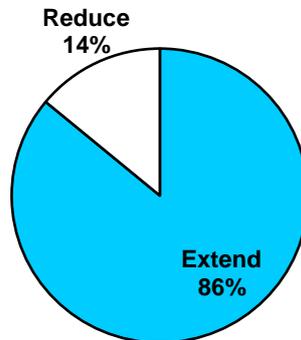
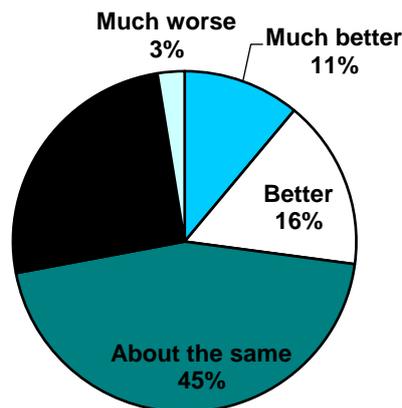


Figure 23. If yes, did you extend or reduce your opening hours? (%)



Most businesses (45%) had about the same levels of activity as in previous years suggesting that there is a consistent level of spend and customer numbers. Only 28% of businesses had worse levels of business activity, about the same as those that had experienced better levels of activity than the previous year.

Figure 24. How does this year's festival compare to last year's in terms of business activity?(%)

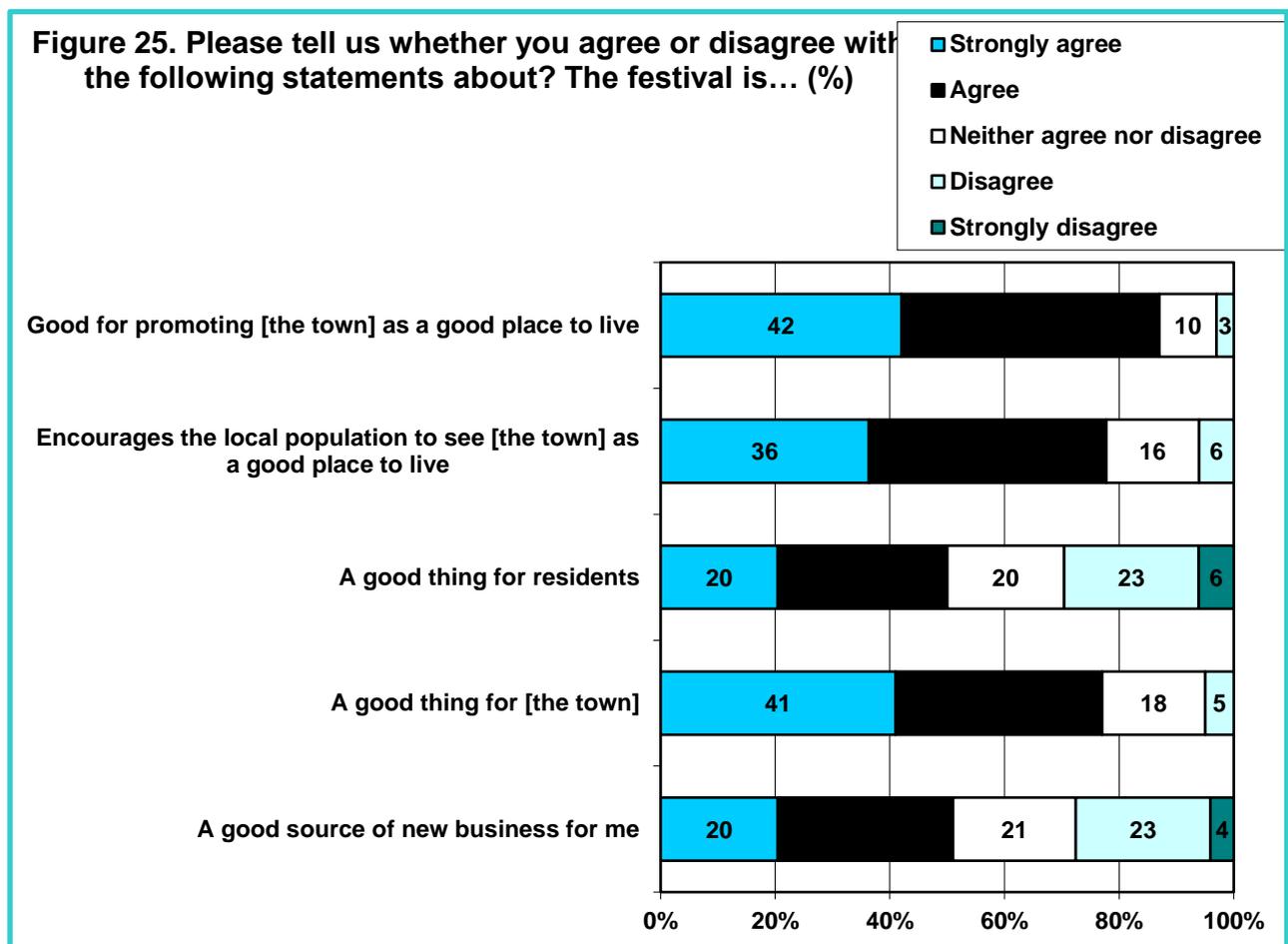


Overall businesses are supportive of the events, regardless of whether they benefit or not with 77% agreeing that the event is a good thing for the town (Cleckheaton, Huddersfield, Marsden or Slaithwaite). The businesses also expressed the view that

they are positive in encouraging people to view the location as a good place to live (77%). As has been mentioned in the visitor survey the events are a social activity and have a positive effect on people’s attitudes and opinions to the location as a place to live.

As a means of promoting the location the events are regarded as good mechanisms for encouraging local people to see it as a good place to live with 87% of businesses regarding this as a positive attribute of the events.

As a means of generating new business 50% of the respondents saw it as a means of generating new business and only 27% disagreed that the events helped them.



Conclusions

Kirklees has a programme of events and festivals that are well run and provide excellent entertainment. From the results of this study it would appear that the 6 events can be put into 2 categories:

- Huddersfield Carnival; Imbolc and Moonraking are events that are rooted in their local communities. They take place outdoors, predominantly on a single day (although they do involve workshops and small events in the lead up to

the main event) and feature a parade or procession as a main draw for the event. The other main feature is that the events are free for visitors as there is no entrance fee and they have a broad based appeal, particularly for families;

- Cleckheaton Folk Festival; HCMF and Marsden Jazz Festival are venue based festivals. They take place over more than one day and feature a mixture of ticketed and free performances. Their focus is on specialist music forms and they draw their audiences from a wider geographic base.

It is clear that whichever type of event visitors are attracted to they have an excellent experience and this seems to bring people back and attract new visitors, especially through word of mouth.

The events are seen as a social activity but there are 2 aspects that could perhaps be looked at in terms of their appeal. There is a low level of attendance by Black and Asian people in general, with the exception of Huddersfield Carnival. The other aspect is that the under 25 years of age group is also under represented with the majority of those attending being over 45 years of age.

The events are positive for businesses and the local population alike and are well supported as a way of promoting their location as a place to live. Businesses will recruit additional staff and change their opening hours during the events and organisers should be encouraged that in general businesses see them as making a positive contribution to people's perceptions of the local area.

The differing nature of the festivals presented its own problems with collecting the data for this study. The first type of event presented a limited opportunity to capture visitors due to the small timeframe available, and the large numbers of people congregated in a single location. Visitors were reluctant to be distracted from watching the parades and therefore we relied on self completion questionnaires being taken away and returned in reply paid envelopes. This proved successful overall but there was a lower than expected return from those at the Huddersfield Carnival.

The music festivals took place over an extended period with visitors located at specific venues. This meant that exit surveys were possible and these were undertaken throughout the duration of the festivals. These surveys were supplemented by self completion questionnaires being left on seats at performances with the option of returning them by reply paid post or handing them in at specific event locations.

Overall Economic Impact

There is a growing recognition that cultural events can provide more than just a social benefit to the communities in which they place. They can also provide an economic impact and as a result understanding these impacts is taking on a greater significance in the cultural and policy planning mechanisms. This study has been commissioned by Kirklees Council as it recognises that the cultural events that it supports are an important part of its economic development strategy.

This study will attempt to present the economic impact of the events by employing economic multipliers that reflect the characteristics of the local economy and by considering the impact on the local economy specifically, which is defined as a 10 mile radius of each event.

Measuring Economic Impact

The purpose of evaluating economic impact is to provide an indication of benefits to a local economy that arise from the investment and expenditure of the festivals and events. What the evaluation seeks to present is an indication of the economic activity that is generated as a result of the festival or event taking place. The more self contained the local economy the greater the impact as expenditure in one area of activity tends to get re-spent with other businesses within the local economy.

There are 3 types of economic impact:

- Direct – which is expenditure by audiences (ancillary) and by the festival or event itself;
- Indirect – which is expenditure by employees of the businesses which have provided goods and services to the festivals or events; and
- Induced – This is expenditure by suppliers to the festival or event on other companies for goods and services.

Calculating economic impact can be achieved through incorporating 4 figures. The methodology used as part of this study follows that of other economic studies and as such reflects a comparable approach adopted within the cultural sector. The 4 figures required in order to measure the economic impact of the 6 festivals and events in the study are set out below:

- Ancillary expenditure of the audience. These figures were collected as part of the visitor surveys and reflect the money spent in the local economy as a result of attending the festival or event;

- The expenditure by the festivals or events themselves. We have only fully presented data for 3 of the festivals at the time of writing, as the other 3 were unable to provide financial data;
- An economic multiplier for indirect impact; and
- An economic multiplier for induced impact.

The economic multipliers that have been used within this study were developed by Experian for the area around York and Yorkshire. These multipliers are recognised within other economic impact studies as appropriate for studies of this type. The multipliers that will be used are 1.19 for indirect impact and 1.59 for induced impact.

In order to further refine the findings we have calculated the economic impact based on extrapolating the figures for visitors that travelled further than 10 miles. The rationale for adopting this approach is that it could be argued that expenditure by local visitors would have been spent in the economy anyway and is therefore creating no additional benefit.

The overall economic impact of the 6 events is £3,282,864. This figure however represents the total expenditure generated within the local economy by the events and does not take into account where the audience was derived from. If this figure was to be expressed in terms of full time jobs supported within the local economy it would represent 165 at the average weekly wage for Kirklees of £396.64¹.

There is a strong case for arguing that where visitors to the events are based locally the expenditure made by them would have found its way into the local economy anyway. For the purposes of this report we have adjusted the overall figures to reflect this by making a distinction between the ancillary expenditure of those travelling over 10 miles return journey, determining that they have travelled from a different local economy. The adjusted figure for economic impact reduces the total calculated impact to £1,921,414. This still represents a significant level of impact created by 6 events.

The adjusted figure represents 97 full time jobs at the average weekly wage for Kirklees of £396.64.

The adjusted figures reflect the fact that those festivals that draw their audiences locally create a smaller economic impact than those that draw a high proportion of non local audiences.

The tables overleaf show the adjusted and unadjusted data sets.

¹ Source: Kirklees Council EDS Briefing Note 14

Table 1: Unadjusted Economic Impact

	Ancillary Expenditure Unadjusted £	Festival Expenditure	Economic Impact Unadjusted
Cleckheaton Folk Festival	129,056	23,483	152,539
Huddersfield Carnival	1,361,442		1,361,442
HCMF	987,706	336,136	1,323,842
Imbolc	67,954		67,954
Marsden Jazz Festival	232,376		232,376
Moonraking	75,621	68,910	144,531
Total	2,854,155	428,529	3,282,684

Table 2: Adjusted Economic Impact

	Ancillary Expenditure Adjusted £	Festival Expenditure	Economic Impact Adjusted
Cleckheaton Folk Festival	69,184	23,483	92,667
Huddersfield Carnival	331,724		331,724
HCMF	862,107	336,136	1,198,243
Imbolc	31,522		31,522
Marsden Jazz Festival	171,189		171,189
Moonraking	27,158	68,910	96,068
Total	1,492,885	428,529	1,921,414

Conclusions

The figures represented in this section have been calculated using a methodology that is comparable to that of other festivals and events. The study however does not take into account expenditure from those festivals where figures were not available. The study has also not sought to look at the income streams of the events; however the events are included in this piece of work as a result of receiving grant support from Kirklees Council. It is reasonable to assume that the level of grant received could be deducted from the overall economic impact as this is not new money being brought in to the local economy.

The figures that have been used for the visitor spending are based on responses to the visitor surveys that were carried out during the various events. In general good response rates were achieved, however the response for the Huddersfield Carnival was low and as such represents only a small sample. As a result they should be treated with a little caution. Our advice to organisers is to use the lower adjusted figures as these are more defensible.

The surveys were also carried out in the period from October 2007 to July 2008. This is before the 'credit crunch' that has created an uncertain economic climate and it remains to be seen if the level of attendance and visitor spend profiles will have any effect on the events in the future.