Value of Outdoor Events 2018 (UK)

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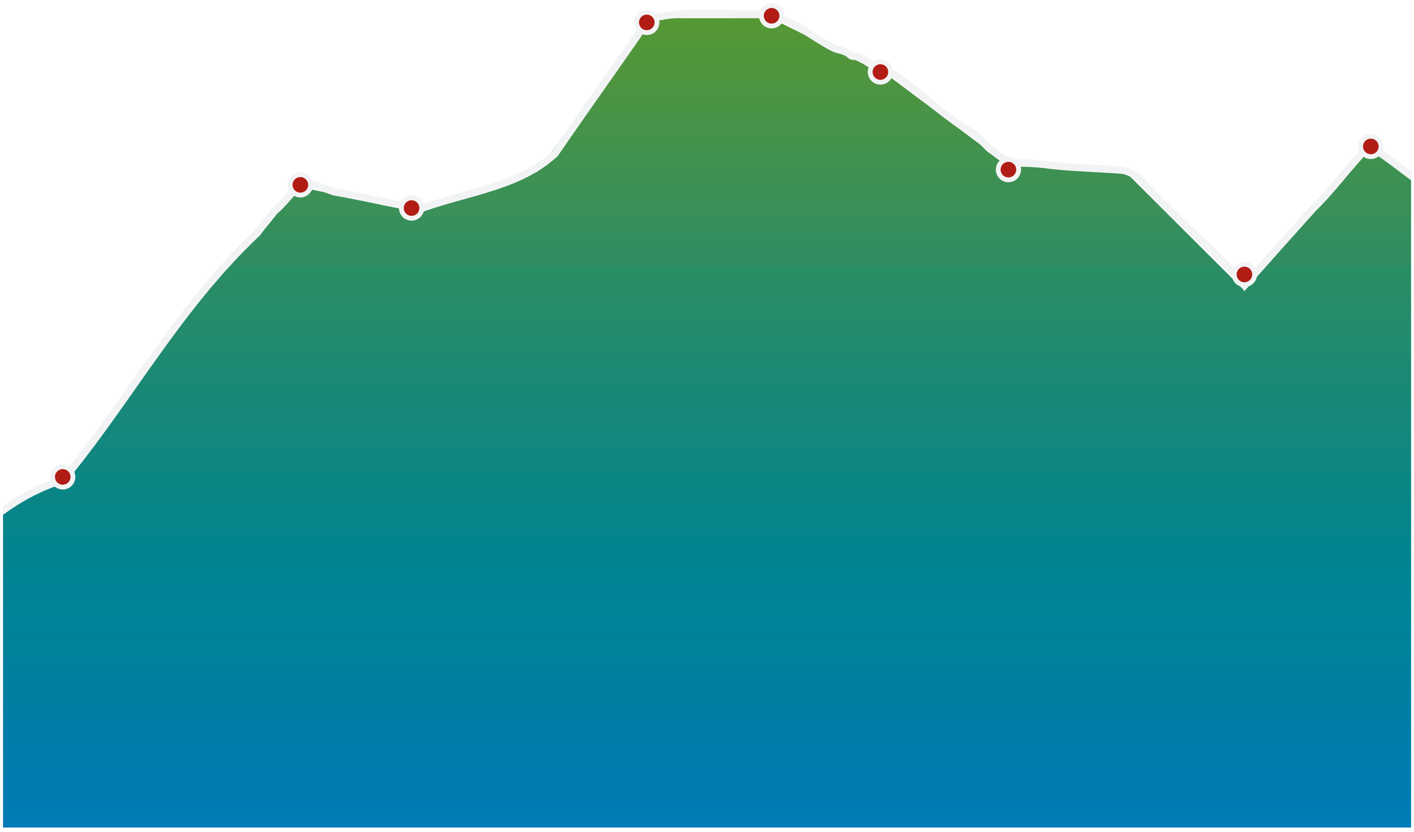

Report for the Events Industry Forum from proceeds of The Purple Guide

The Events Industry Forum
(http://www.eventsindustryforum.co.uk/)

The Events Industry Forum provides an informal organisation that brings together event industry trade associations and similar bodies to discuss issues of common interest. The Forum usually meets twice a year.

Other than an elected Chairman and Secretary, the organisation has no formal structure or role, although from time-to-time it may act to represent its member bodies in respect of issues where there is a unilateral and common interest.

EIF is supported by the following organisations:

This study is supported by proceeds from **The Purple Guide**
(https://www.thepurpleguide.co.uk/)

the purpleguide to Health, Safety and Welfare at Music and Other Events

The Events Industry Forum publishes the 'Purple Guide', which aims to provide guidance to help those who organise music or similar events run them safely. The Forum took over publication of the Guide from the Health & Safety Executive in 2013 and set up a separate limited company – EIF Limited – to manage the publication. After covering administration costs, all income generated by sales of the Purple Guide are reinvested in the industry through grants. The Purple Guide is updated regularly and revisions to chapters are made available to subscribers as they are completed. Subscribers are automatically notified when revisions are made and receive these free as part of their annual subscription.

Authorship and acknowledgements
This report has been produced by Bournemouth University. The views expressed herein are those of the authors only and are based upon independent research by them. The report does not necessarily reflect the views of the Events Industry Forum.

FOREWORD

On behalf of EIF I am delighted to introduce this valuable piece of work.

“What is the value of the outdoor event sector and how many people does it employ?”

“What is the profile of attendees?”

“Are events sustainable?”

These are just a few of the questions we, as an industry forum, are asked every year.

This research will go a long way towards helping us provide some answers.

Facts and figures are needed to help all of us make the right decisions. Local and national government need them to understand the socio-economic impact events have as well as to help make decisions on such things as licensing and transport. Organisers need them to make business decisions and to better understand the thinking of their audiences.

This is the first substantive research that has been undertaken into the outdoor event sector and we hope it will lead to a better understanding of the economic worth of the industry to both the UK and local economies.

Furthermore, as this has been funded by the industry through sales of the Purple Guide, we are pleased to be able to make the report totally FREE. For this I would like to acknowledge the many hours of voluntary work put in by chapter authors and expert panels to create and maintain the Purple Guide, which has enabled us to raise considerable funds for industry projects like this.

As always research is only ever as good as the answers given at the time. We also fully recognise that this initial work is only the start and does not pick up the full breadth of outdoor events. In some cases, work is being done separately to pick up these. For example, Agricultural Shows are being separately researched and there is already a weight of information about some sporting events.

However, we hope to be able to maintain and build on this initial work in coming years so that our industry realises the recognition it deserves for the enormous contribution it makes to the UK economy.

Steve Heap
Chair, Events Industry Forum.

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BAME	Black, Asian and Minority Ethnic
DCMS	Department for Digital, Culture, Media & Sport
EIF	Events Industry Forum
FTE	Full-Time Equivalent
GVA	Gross Value Added
ONS	Office for National Statistics
SIC	Standard Industry Classification
SOC	Standard Occupational Classification

VALUE OF OUTDOOR EVENTS 2018

Measuring the economic and sociocultural contribution of outdoor events in the UK

Attendance

141.5 m

Spend

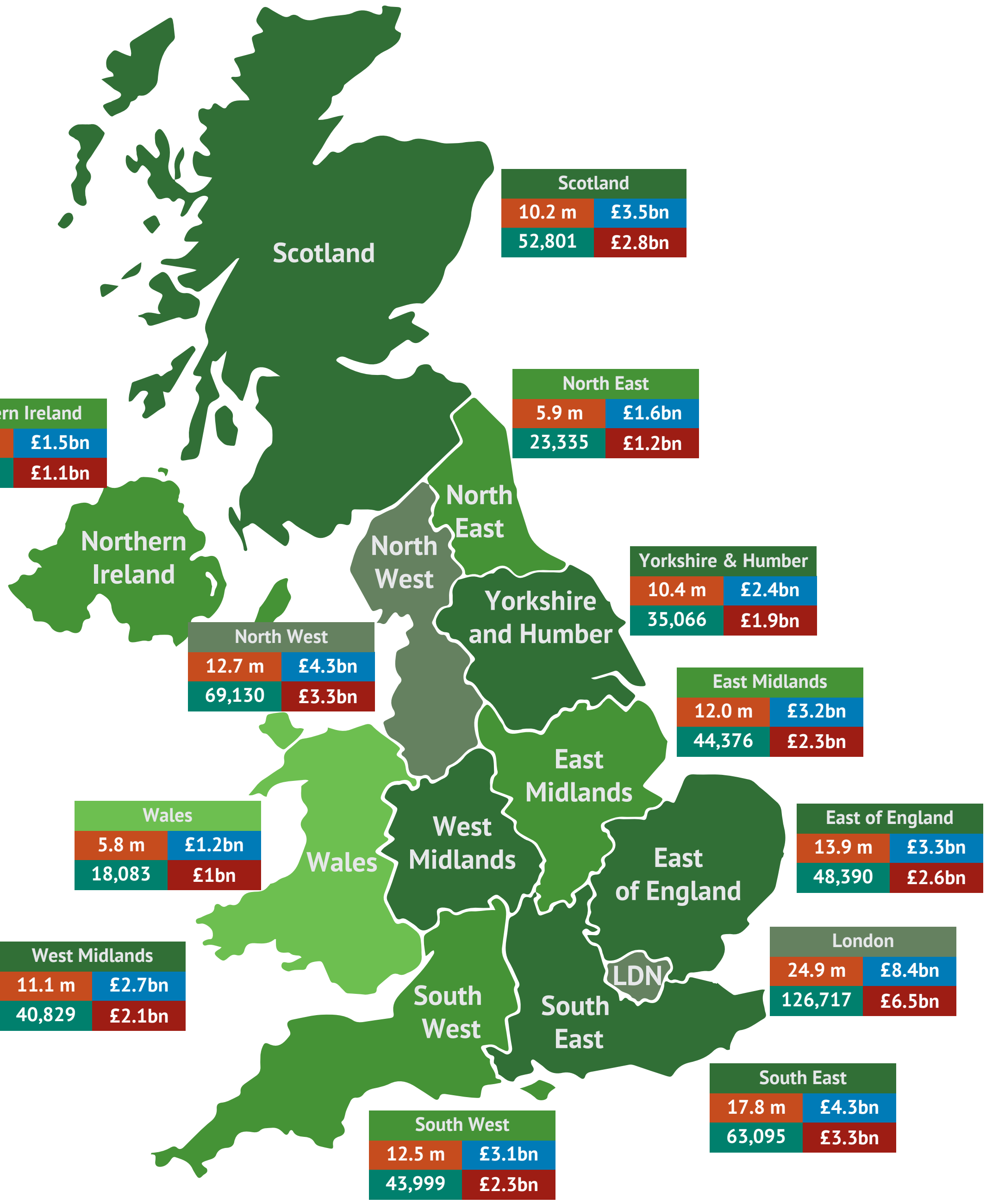
£39.5bn

Jobs

589,000

GVA

£30.4bn

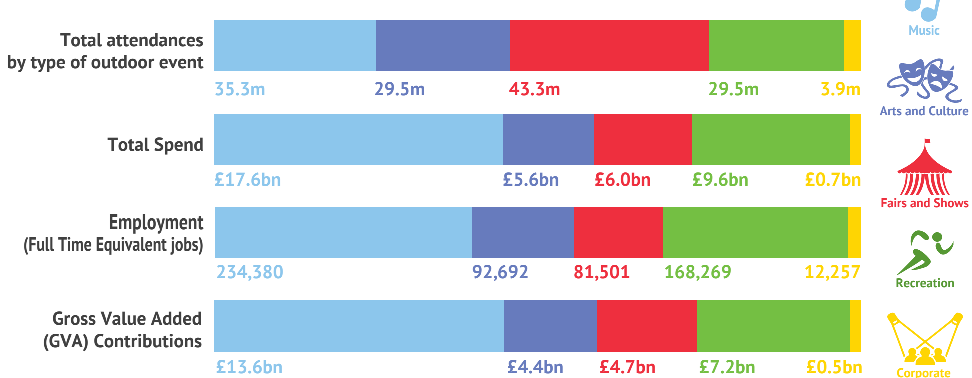


Region	Attendance	Spend	Jobs	GVA
Scotland	10.2 m	£3.5bn	52,801	£2.8bn
North East	5.9 m	£1.6bn	23,335	£1.2bn
Northern Ireland	4.2 m	£1.5bn	23,279	£1.1bn
Yorkshire & Humber	10.4 m	£2.4bn	35,066	£1.9bn
North West	12.7 m	£4.3bn	69,130	£3.3bn
East Midlands	12.0 m	£3.2bn	44,376	£2.3bn
Wales	5.8 m	£1.2bn	18,083	£1bn
East of England	13.9 m	£3.3bn	48,390	£2.6bn
London	24.9 m	£8.4bn	126,717	£6.5bn
West Midlands	11.1 m	£2.7bn	40,829	£2.1bn
South East	17.8 m	£4.3bn	63,095	£3.3bn
South West	12.5 m	£3.1bn	43,999	£2.3bn

Motivations for attending outdoor events

- 87% Great entertainment
- 82% Opportunity for friends and family to get together
- 73% Opportunity to socialise with like-minded people
- 72% Offer an escape
- 60% They are very important to me

Economic contribution by type of outdoor event



The main findings of this study demonstrate the economic and sociocultural contribution that outdoor events made to the UK economy in 2018. Measuring the economic contribution of the outdoor event sector was based upon the spending behaviour of a representative sample of UK residents going to different types of outdoor events in 2018.

1. Introduction

This report shares the findings of the Value of Outdoor Events (VOE) research project undertaken to measure the economic and sociocultural contribution of outdoor events in the UK in 2018.

1.1 Background and aim of the study

Outdoor events are ubiquitous across the UK, reaching all people and every community. They materialise in green-field sites and streets; in our waterways and skies.

Outdoor events bring life and vibrancy to urban and rural spaces, often creating opportunities for activities to reach people and communities who do not have indoor spaces. They can help to bring about social cohesion in communities as well as offering people a chance to escape and enjoy the countryside and outdoors.

What a boring place the UK would be without them and how poor our economy and communities.

By their very nature outdoor events are difficult to capture and measure, involving a plethora of types, locations and organisations. Whilst those involved in the industry are passionate about making people smile, they have to date struggled to find the time or resources to research the value that the smile has economically and socially. Consequently, the sector tends to be underestimated and undervalued.

By bringing the industry together, and through funding raised from publishing the Purple Guide, The Events Industry Forum has been able to commission Bournemouth University to undertake this research with the aim of providing independent, credible and robust evidence of the scale and breadth of the economic and sociocultural contribution outdoor events make to the UK.

It is important to understand the economic value of outdoor events because they support so many businesses and people's employment which needs to be safeguarded and nurtured. It is also essential to understand their contribution to the fabric of our communities and to individuals personally to ensure their survival against the many pressures they face, such as public sector austerity measures.

The continued challenges of providing a safe and secure environment within which to have an enjoyable event require that, more than ever, the case for outdoor events needs to be made and their efforts and contributions acknowledged and shared.

It is anticipated that the study findings reported in this document will provide event organisers and local authorities with valuable information about the contribution of outdoor events when making decisions on supporting and staging events.

"For too long our industry has tended to be overlooked by Government because of a lack of evidence about the economic and social benefits of events," said Steve Heap, Chair of the Events Industry Forum. "This has resulted in our sector getting little support and events often facing difficult obstacles because they are wrongly seen negatively. Yet we know where research has been done that outdoor events can make an enormous contribution to localities, from employment to increased turnover for local businesses."

1.2 Scope

The outdoor event sector covers a diversity of types of event involving a variety of people and organisations. What brings them together are the challenges of being temporary in structure, as well as in time, and their openness to the vagaries of the weather.

In setting up this study, it was important to identify what was in and out of its scope as there is no established definition of the outdoor event sector.

While the Events Industry Forum is a network of associations and organisations who predominantly operate in the outdoor sector, they are not all encompassing. For example, the full scope of sports is not represented by EIF members.

People 1st, who were the sector skills council for events, identified outdoor events as an industry but without a clear definition, while the Performing Right Society definition of a qualifying Festival is “predominantly an outdoor site using temporary infrastructure which is (i) erected for the purposes of that festival (including as a minimum all of the following: the construction of infrastructure relating to performance areas, the presence of temporary perimeter fencing or controlled access by other temporary means and the provision of toilet facilities and a clean water supply), (ii) used mainly for the purposes of that festival, and (iii) substantially dismantled after the festival. A Qualifying Festival must take place over consecutive days (but no more than ten in any calendar year) with at least twenty unique music performances ...” (PRS, 2019, p.5).

For the purposes of scoping out the research for this study on the value of outdoor events, the following definitions were applied:

- That events were predominantly outdoors. The definition given for the surveys was to include events with some indoor activity but where, most of the time, visitors were outdoors. Temporary structures such as tents, marquees and temporary buildings were included as being outdoors.
- That the events made use of temporary structures, whether for cover or not.
- That planned/coordinated activities were temporary in nature (did not last longer than a month).
- That events were public (i.e. not private weddings or meetings).
- That events were ‘special’ and not part of a programme of outdoor activities, such as weekly park runs.

There are many ways of distinguishing events, from their size, type of content, type of venue within which they are organised or even their purpose. For this research events were categorised into five different types, based predominantly on their main content (Table 1.1). These categories mirror, as closely as possible, the Great Britain Tourism Day Visitor classifications. They incorporate the 16 event types identified by the Events Industry Forum and offer a broader definition based on the main criteria of being predominantly public and outdoor (Appendix 7.1).

Each of these categories covers many different events and it was difficult to ensure that each type was mutually exclusive. It was left to the survey participant to decide for themselves which category the events that they attended fitted into. Table 1.1 demonstrates the scope of activities covered by outdoor events, with a few examples.

Category of outdoor event	Description	Sub-categories	Examples
1. Outdoor music concert or festival	An outdoor event where the core content or programme is music; of whatever genre	rock, classical, electronic dance music	Shambala https://www.shambalafestival.org Towersey Festival https://www.towerseyfestival.com/
2. Outdoor arts or cultural festival, show, fete, carnival or parade	An outdoor event where the core content is creative and cultural in essence. The main purpose is celebratory, entertaining and public in nature	performing arts, art, film, pyrotechnics, aeroplane, light, food, literary, historical, seasonal, religious, political	Notting Hill Carnival https://nhcarnival.org Whit Walks http://whitfriday.brassbands.saddleworth.org/Walks.html Bournemouth Arts by the Sea Festival https://artsbythesea.co.uk
3. Outdoor fair, exhibition, trade show or rally	An outdoor event where the main aim is to showcase the content or programme for trade and promotional reasons	country, agricultural, horticultural, animal, steam, fun-fair, environmental, nature, waterways, non-permanent markets (farmers, Christmas)	Bath & West Show https://www.bathandwest.com/royal-bath-and-west-show Great Dorset Steam Fair https://www.gdsf.co.uk/ Royal Highland Show https://www.royalhighlandshow.org/
4. Outdoor recreational and sporting events, tournaments or regattas	The main element is physical activity on behalf of the majority of the participants. There may be spectators, but the main emphasis is on the participants	Highland Games, competitions, fun runs, obstacle races, walking, sportive, wellbeing	Edinburgh Marathon https://www.edinburghmarathon.com/ Walking festivals https://www.walescoastpath.gov.uk/latest-news/news-and-press-releases/walking-festivals/?lang=en
5. Outdoor corporate events	These events are corporate with the main aim of bringing the public together for corporate or business reasons	outdoor product launches, experiential, team-building	Todds Leap https://www.toddsleap.com/book/17/extreme-play-day Weatherized (Amplify) https://www.weareamplify.com/work/weatherized/

Table 1.1: Explanation of outdoor event type categories

Many of these events last from one to three days and attract thousands of visitors, which can involve considerable travel and overnight stays in places ranging from campsites to hotels.

Many of the events bring substantial benefits for local economies, adding to spend from visitors and tourists and hence generate more employment and wealth to local communities.

The following Section outlines how these factors were captured in the data collection.

1.3 Methodology

While there have been occasional studies undertaken on individual outdoor events, and there are examples available from the eventIMPACTS resource website, very little has been done to research outdoor events as an economic sector as a whole.

Furthermore, there is little available sector data because the industry is not recognised by the Office for National Statistics as there are no Standard Industry Classification (SIC) or Standard Occupational Classification (SOC) codes for outdoor events.

Consequently, the starting point for this study was to undertake a UK-wide representative population survey to measure the contribution that outdoor events make to the UK economy.

For this study the value of outdoor events was assumed to be based upon two main identifiers, economic and sociocultural.

Economic Contribution: A traditional approach was undertaken to measuring the economic contribution of the sector, based upon the spending behaviour of a representative sample of UK residents at, and going to, different types of outdoor events in 2018.

Sociocultural: A more holistic approach was taken to understand the social capital afforded by outdoor events. The sociocultural contribution included community identity, social cohesion, recreational opportunity, the development of local enterprise, improvement of public facilities and amenities and the conveyance of knowledge about the history and heritage of an area. (Deery & Jago, 2010; Kim et al., 2015; Robertson, Rogers & Leask, 2009).

The research also recognised the challenges of outdoor events and people's perception of these, including environmental and management issues that could be seen as negatives.

To achieve this, an on-line questionnaire was created and a representative sample of 4,463 respondents drawn from a cross-section of the UK population was surveyed at the end of January 2019, using CINT panel members. CINT is an insight exchange agency that is widely used internationally for providing balanced research panels.

Those surveyed were asked about their attendance, expenditure, attitudes and perceptions of UK outdoor events in 2018.

While it is acknowledged that memory recall and generalisations across all outdoor events has limitations, researchers identified this as the most accurate way of collecting information on outdoor event behaviours, expenditures and perceptions without undertaking a monthly or fortnightly survey, which would have been out of the reach of available funding.

Full details of the survey and the methods used can be found in Appendix 7.2.

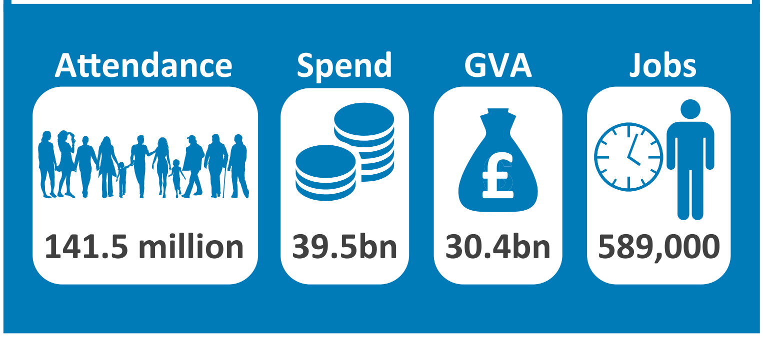
2. Economic contribution

2.1 Overall economic findings

The main findings of this study demonstrate the economic contribution that outdoor events made to the UK economy in 2018 (Figure 2.1). The overall spend was based upon the number of attendances at events, including the on-site and off-site spend for each attendance. The Gross Value Added was then calculated from existing multiplier data, as was the number of full-time equivalent staff employed to provide the events (Appendix 7.2).

In 2018 there were 141.5 million visits to outdoor events, with a total on-site and off-site spend of £39.5bn. Using accepted multipliers, this means that the Gross Value Added (GVA) contribution was £30.4bn, with a full-time equivalent employment of just under 600,000 people.

Figure 2.1:
The overall UK outdoor event economic contribution figures for 2018



These figures are similar to those identified for the UK Meeting Industry (MPI, 2011). They measured 116.1 million attendees accounting for £39.8bn spend. Their GVA was calculated to be £20.6bn, with 423,445 FTE. When compared with the official ONS, DCMS data (DCMS, 2019a), the outdoor event sector makes a substantial contribution (Table 2.1). It is recognised that the results from this study are not mutually exclusive from this data but with approved and collected data by SIC and SOC a more comparable measure would be possible.

DCMS Sector	GVA (2017)	FTE (2018)
Civil Society	N/A	903,000
Creative Industries	£101.5bn	2.0 million
Cultural sector	£29.5bn	659,000
Digital sector	£130.5bn	1.5 million
Gambling	£9.3bn	87,000
Sport	£9.8bn	570,000
Telecoms	£32.6bn	177,000
Tourism	N/A	1.6 million

Table 2.1: Comparison of related sector GVA and FTE (Source: DCMS, 2019a)

The overall figures can be broken down into different types of outdoor event which, to an extent, demonstrate the scale and geographical spread of these outdoor events (Table 2.2).

While fairs and shows have the highest attendance figures they are generally more local and so the spend per event is less. Corporate public events are less frequent and so play a smaller part overall but are still significant enough for them to be recognised as part of the outdoor event sector.

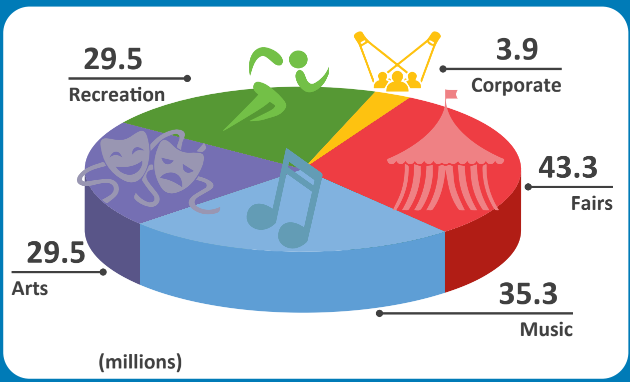
	Total Attendances	Total Spend	Spend per event	GVA Contribution	Employment
Type of outdoor event	(millions)	(£ millions)	(£)	(£ millions)	(FTE jobs)
Music	35.3	17,606	499.13	13,588	234,380
Arts & Culture	29.5	5,590	189.22	4,384	92,692
Fairs & Shows	43.3	5,994	138.51	4,695	81,501
Recreation	29.5	9,643	327.31	7,166	168,269
Corporate	3.9	690	175.16	534	12,257
Totals	141.5	39,523	279.33	30,367	589,099

Table 2.2: Summary of the contribution of UK outdoor events in 2018

Outdoor music events and festivals provide the greatest economic contribution, with the highest spend per event visit, GVA contribution and employment. Music and recreational events predominantly encourage overnight stays, which supports accommodation providers (including retailing of mobile accommodation) as well as food, drink, travel, durable good and merchandise suppliers.

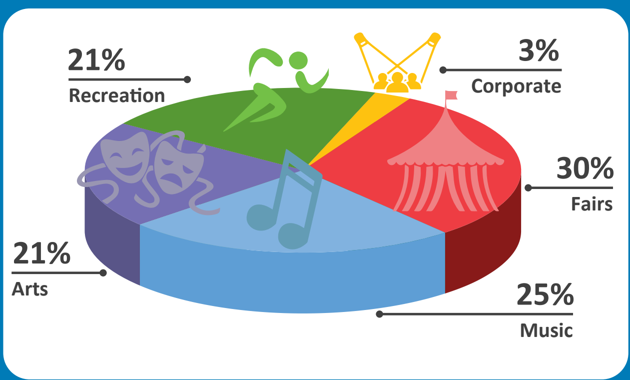
2.2 Attendance

Figure 2.2: Total attendances at each type of outdoor event in 2018 (millions)



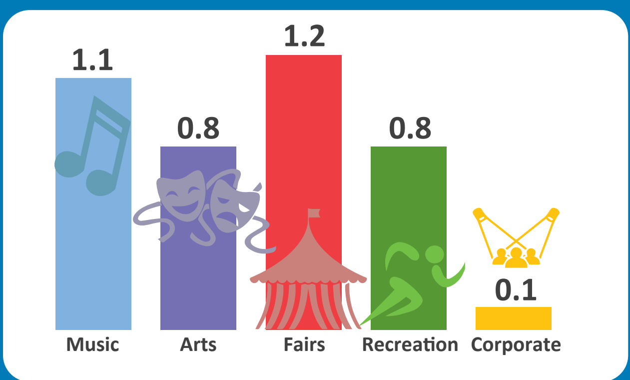
Attendance figures for events are not only important for those generating an income through ticket sales or secondary spend but also as an indicator of how relevant they are to a person's lifestyle and quality of life. The total number of attendances at outdoor events in 2018 was 141.5 million. Figures 2.2 and 2.3 illustrate how this total figure was made up by the different types of outdoor event.

Figure 2.3: The share of total outdoor event attendances in 2018 by type of outdoor event



The 141.5 million visits to events as a percentage demonstrate that corporate outdoor events are in the minority for public attendances (Figure 2.3). With 3.9 million attendances, however, they warranted being kept as part of the overall results (Figure 2.2).

Figure 2.4: Average number of attendances in 2018 by type of event



The survey also looked at the average number of times participants had been to an outdoor event in 2018 by each type of event (Figure 2.4)

As demonstrated by figure 2.4, the average number of attendances at different types of events per person is potentially quite conservative. A more frequent capture of outdoor event attendances, say through surveys such as the Taking Part Survey or Visit Britain Day Visitor Survey or even internationally, the International Passenger Survey, could give a more accurate figure.

2.3 Spend

The total spend on outdoor events in 2018 was £39.5bn. This can be broken down into the total spend by type of outdoor event in Figure 2.5.

Figure 2.5: Spend by type of outdoor event (£ millions)

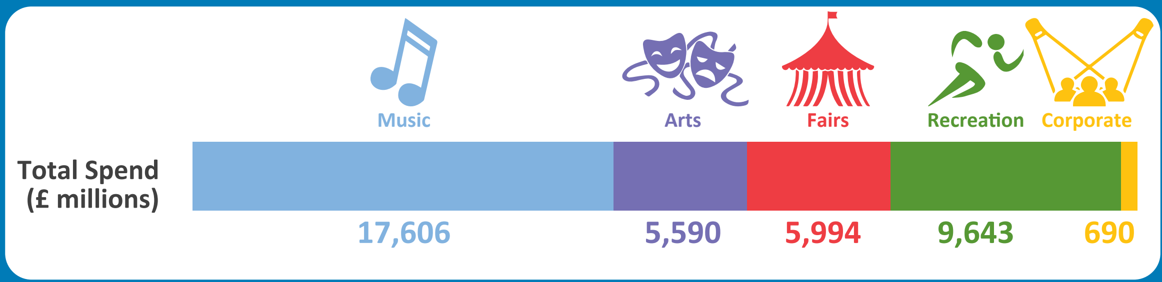
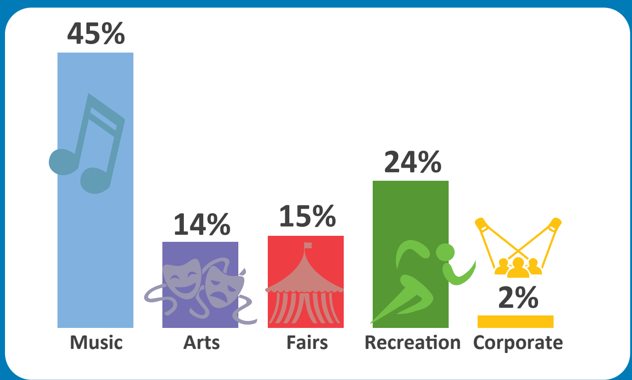


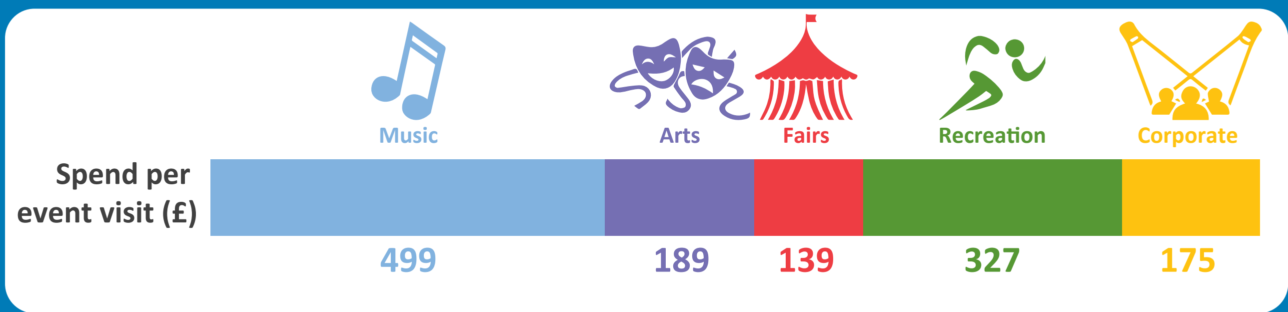
Figure 2.6: Share of spend by type of outdoor event

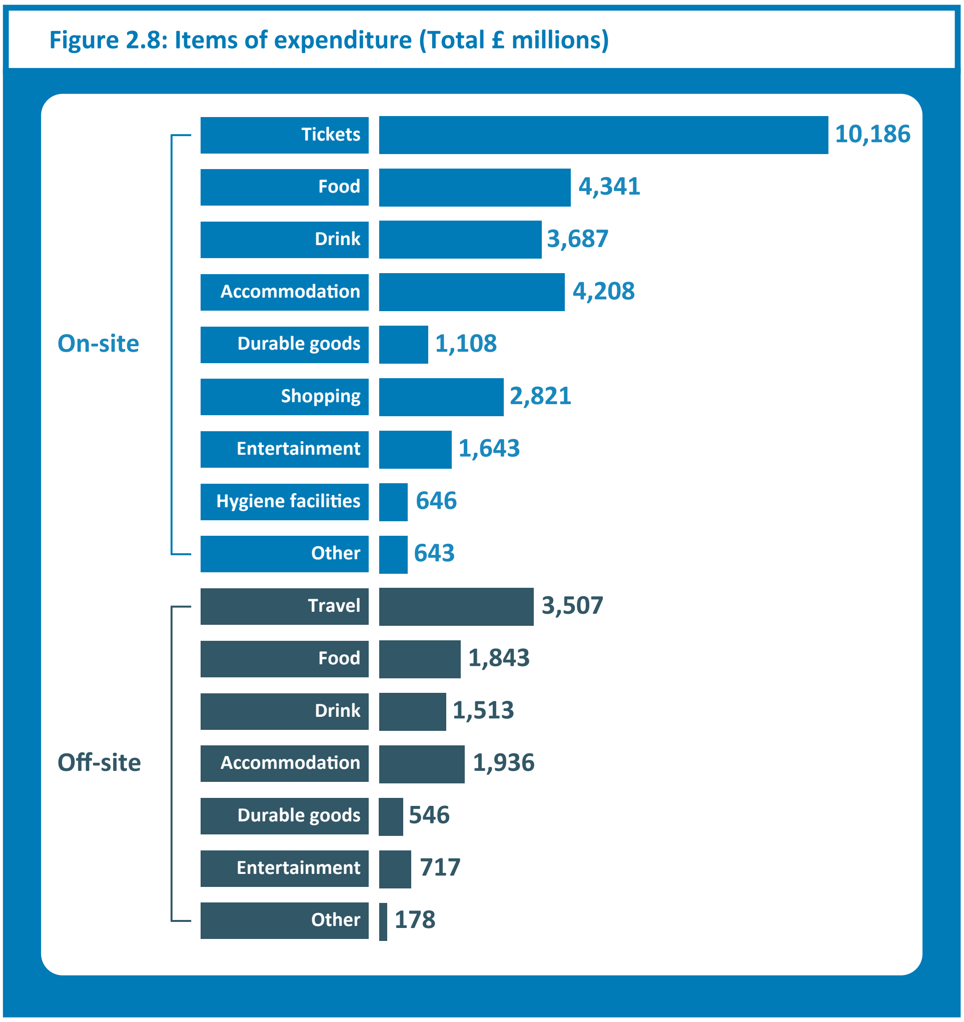


Nearly 70% of the total spend was on music and recreational outdoor events (Figure 2.6). This compares to the highest attendance figures being for fairs (Figure 2.3).

The spend per visit to each type of event is why music and recreational outdoor events contribute most to the spend (Figure 2.7), as the nature of these two types of event mean longer durations, additional expenditure and higher ticket prices.

Figure 2.7: Spend per individual visit by type of outdoor event (£)





The 'fairs' category includes outdoor fairs, exhibitions, trade shows and rallies. These include events which are called country, agricultural, horticultural, animal, steam, fun-fairs, environmental, nature, waterways and non-permanent markets (e.g. farmers, Christmas). Many of these are free to access and where expenditure is more of a choice (e.g. food stalls). There is potential here for these types of event to investigate ways of encouraging additional spend whilst being used as a free event for entertainment purposes.

Research undertaken in 2017-2018 on Christmas markets by the Local Government Association and the National Association of British Market Authorities, identified the growth of this sector and provided individual market case studies.

This study indicates that events generate most of their spend through ticket income. Figure 2.8 gives the spend by item of expenditure for all outdoor events, identifying which is onsite and offsite spend. The spend on items directly related to attending an event demonstrates the general value and spread of expenditure.

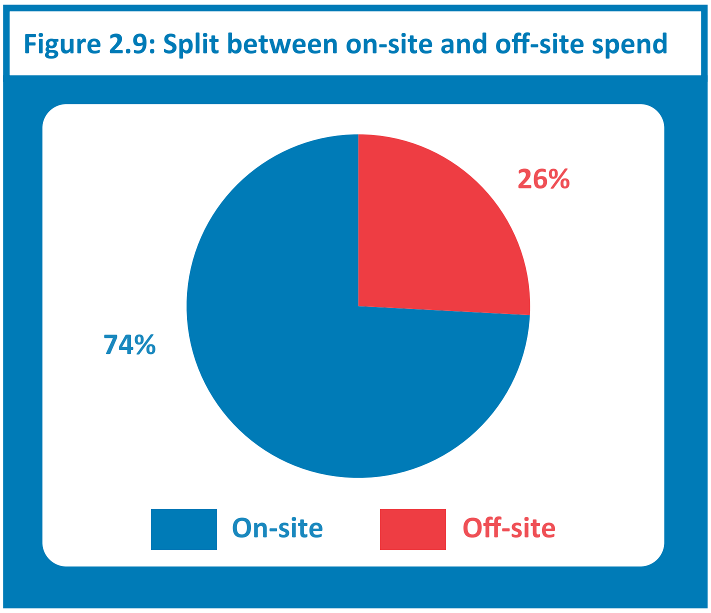


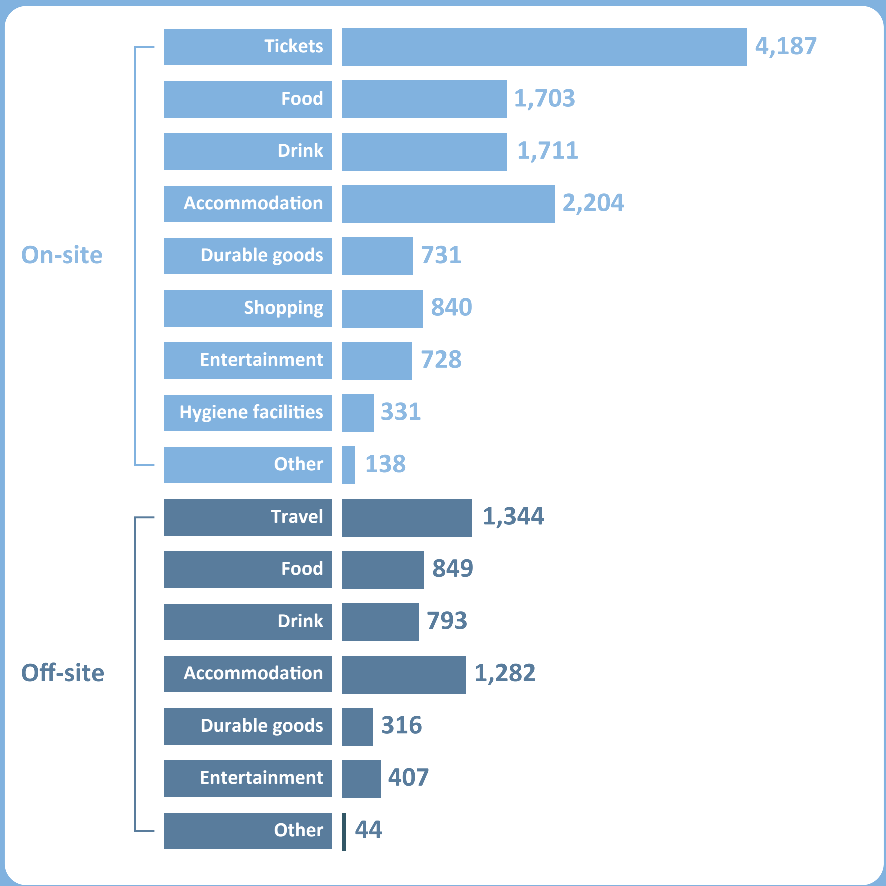
Figure 2.9 illustrates that the majority of spend is on-site at the events themselves. The travel to the event is the major item of off-site expenditure, with accommodation, food and drink being the next highest items of spending. At the event, tickets, accommodation, food and drink are main items of expenditure.

Without detailed research by event, it is difficult to evaluate the extent to which the spend is kept locally or even regionally. Many attempts are being made by event organisers for suppliers and their supplies to be as local as possible, especially in terms of staffing, food and drink provision.

Total figures by item of expenditure hide the differences between events. For example, many are freely open to the public and rely on local funding and spend at the event for income to cover their costs, rather than ticket income. Similarly, events such as food festivals may rely on retail sales to cover their costs rather than tickets.

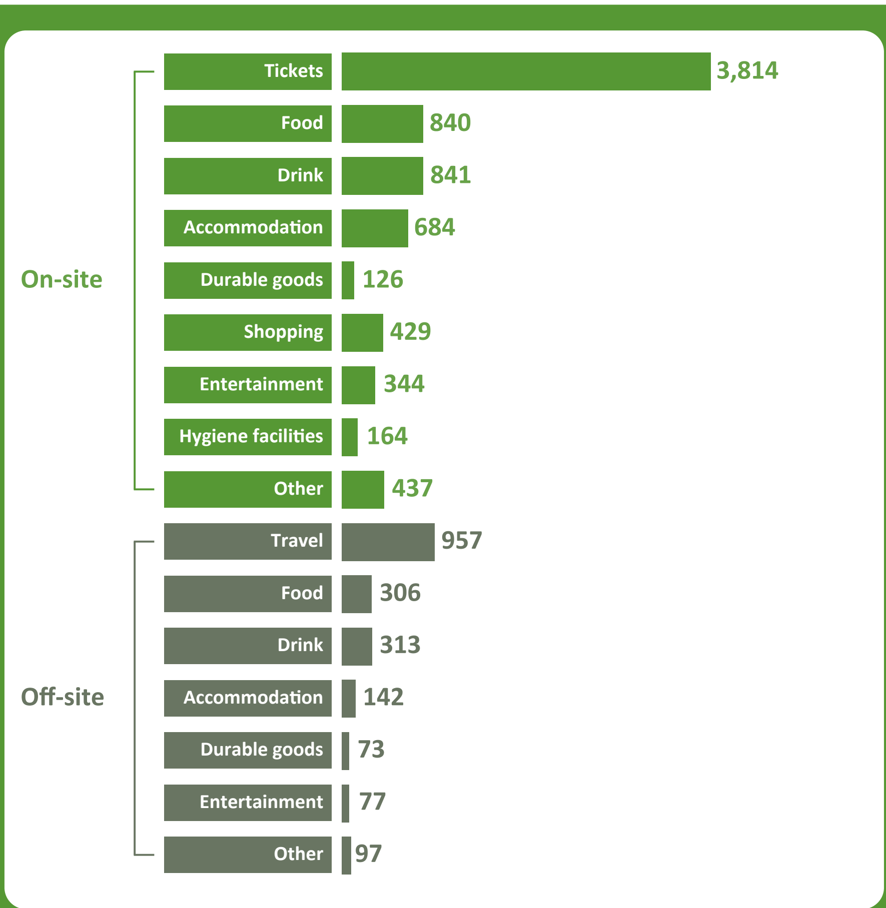
There are also events where ticketing is used to control numbers for safety reasons (e.g. the London New Year's Eve fireworks display) rather than for revenue generation.

Figure 2.10: Music event expenditure by item of spend (£ millions)



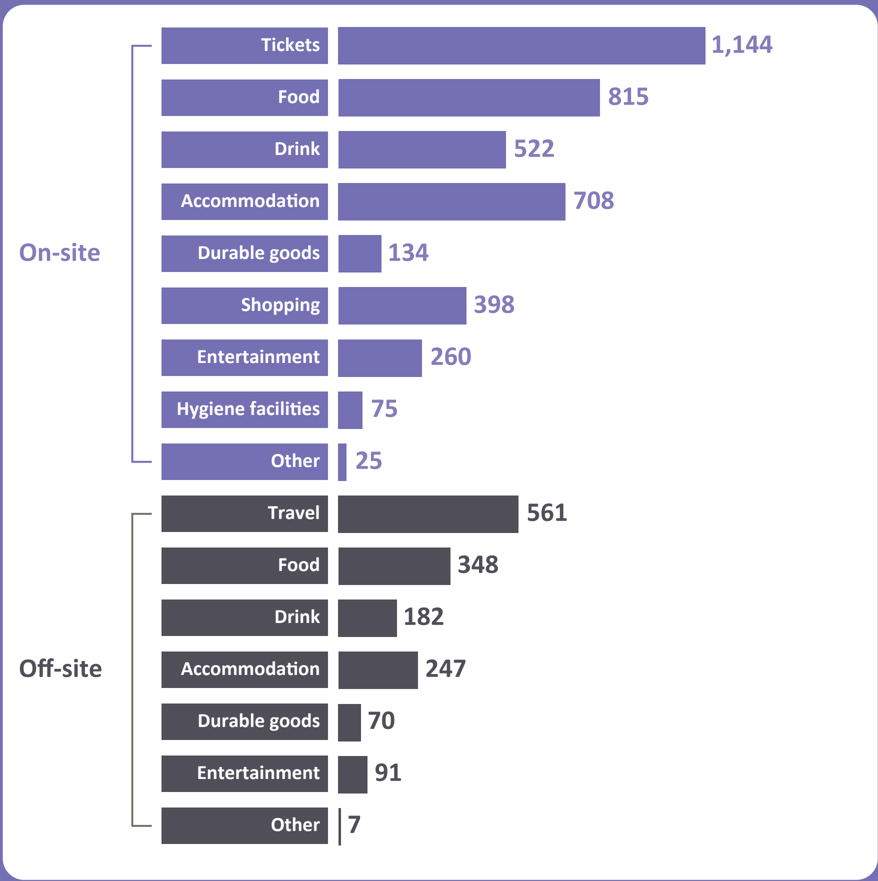
Taken together, Figures 2.10-2.14 illustrate the differences between spending at different types of outdoor event and how ticket income is a major part of the spend for most.

Figure 2.11: Recreation event expenditure by item of spend (£ millions)



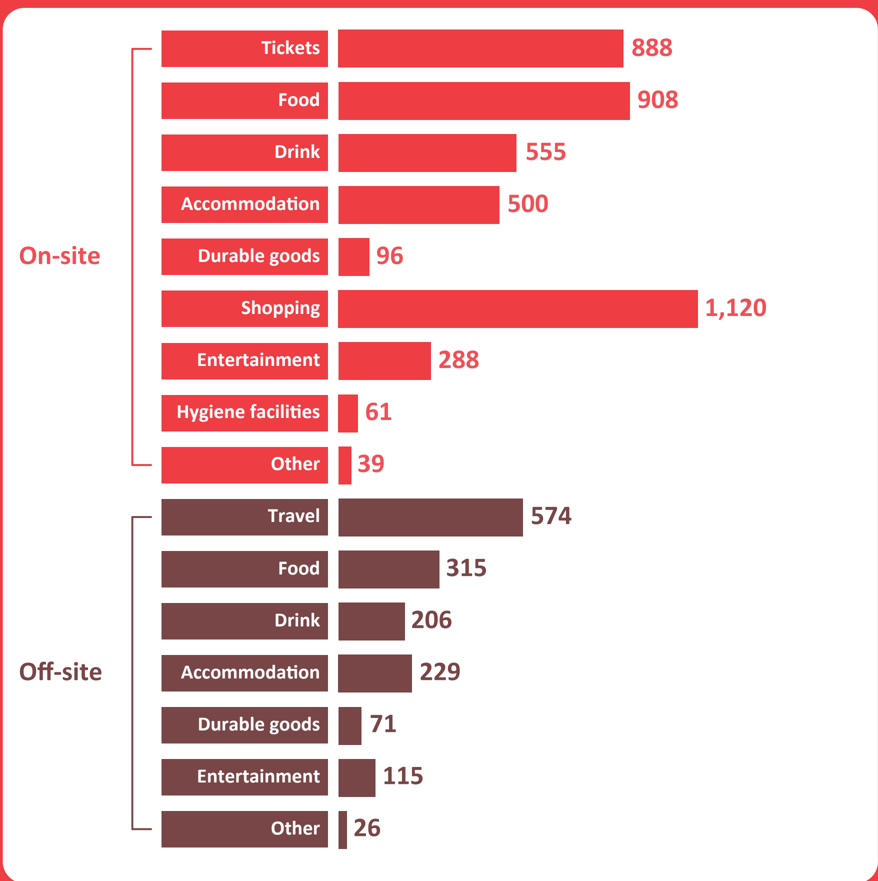
For music and recreation events, spend on tickets is more marked than other types of events (Figures 2.10 and 2.11). There are differences in the other items of expenditure between these two types of event. Music events offer income streams across a number of items, with recreational events being mainly focused on the cost of participation.

Figure 2.12: Arts event expenditure by item of spend (£ millions)



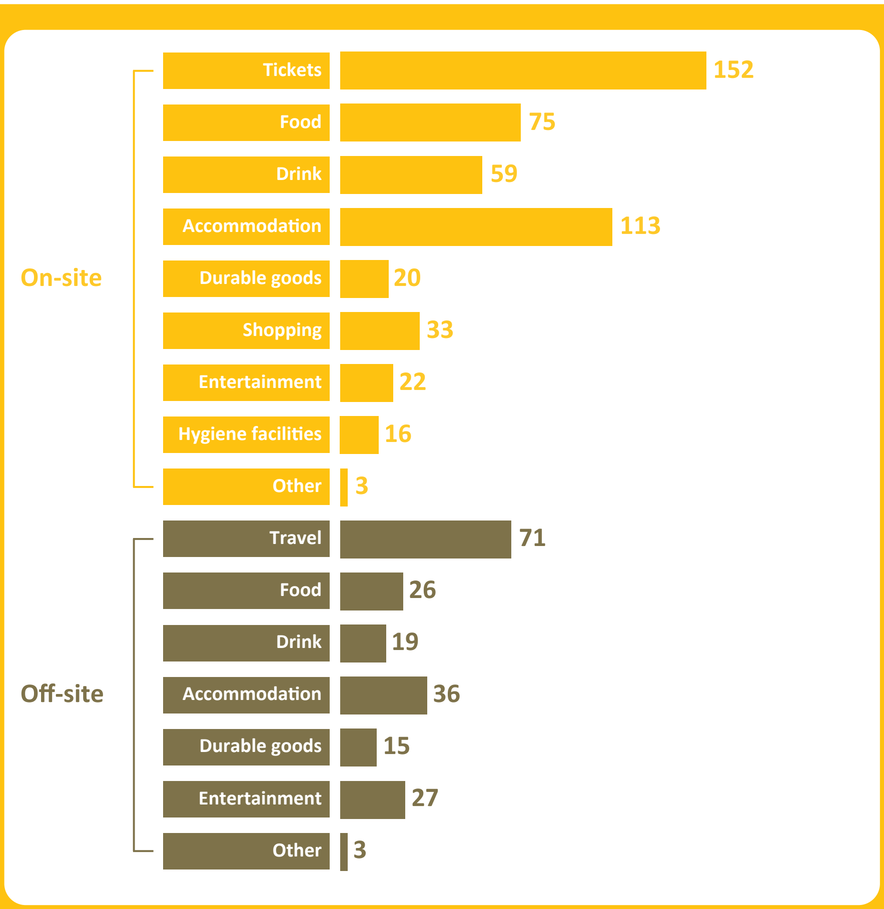
Music and recreation events are predominantly longer events with overnight stays with associated spend on travel, accommodation, food and drink. This compares with the arts (Figure 2.12) and corporate (Figure 2.14) categories where tickets generate the majority of the spend.

Figure 2.13: Fair expenditure by item of spend (£ millions)



In comparison, fairs (Figure 2.13), which tend to have a focus on retail stalls, generates more spend on shopping than other items of expenditure.

Figure 2.14: Corporate event expenditure by item of spend (£ millions)



The total spend for corporate events is lower than music and recreational events but the proportion of the items of expenditure on tickets, travel and accommodation are very similar (Figure 2.14).

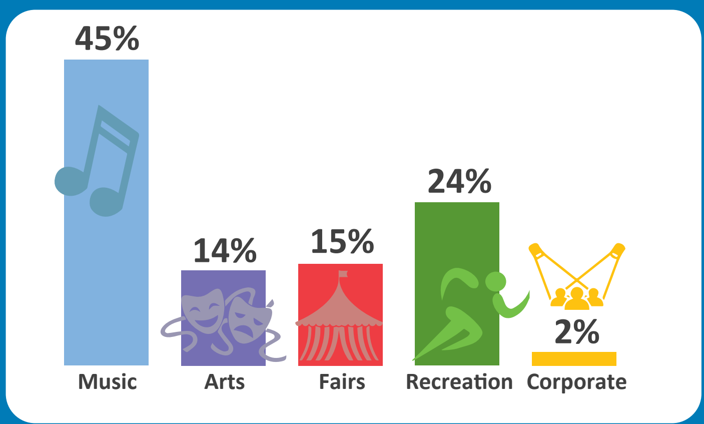
Expenditure on outdoor events is the basis for calculating the economic contribution that they make and capture of this information in future would help to build more detailed insight into both the value of outdoor events as well as in helping organisers to gain better understanding of spending trends.

The following Sections use other secondary data to calculate the gross value-added contribution of that spend (Section 2.3) and the employment figures related to that expenditure (Section 2.4).

2.3 Gross value added contribution

The overall gross value-added contribution of outdoor events to the UK economy in 2018 was £30.4bn. This figure was calculated by taking the expenditure by item at each type of event (Figures 4.10 through 4.14) and calculating the average GVA contribution for each type of expenditure. GVA contributions by each expenditure item are then combined to obtain the total and by type of outdoor event (Figure 2.15). The calculations and multipliers used are explained in Appendix 7.2.

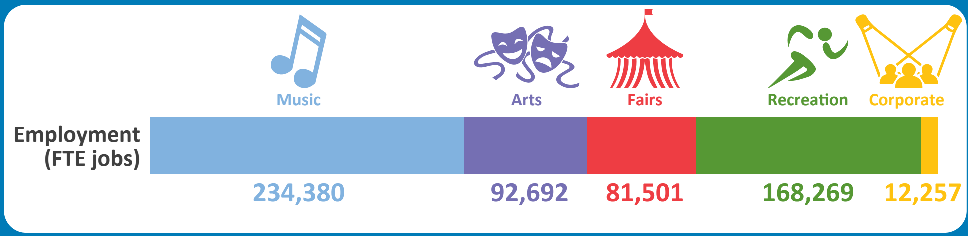
Figure 2.15: GVA Contribution by type of event (%)



Outdoor music events make up the largest share (45%) of outdoor event GVA, followed by recreation events (24%), fairs (15%) and arts events (14%) with corporate events contributing 2% of the outdoor event total GVA.

2.4 Employment

Figure 2.16: Number of employees (FTE) by type of outdoor event



The value of events can be measured in terms of full-time equivalent employment figures. The total FTE employment in outdoor events is 589,000. Music events have the highest FTE employment (234,380) followed by recreation (168,269), arts (92,692), fairs (81,501) and corporate events (12,257) (figure 2.16).

2.5 Economic contribution of each UK nation and English region

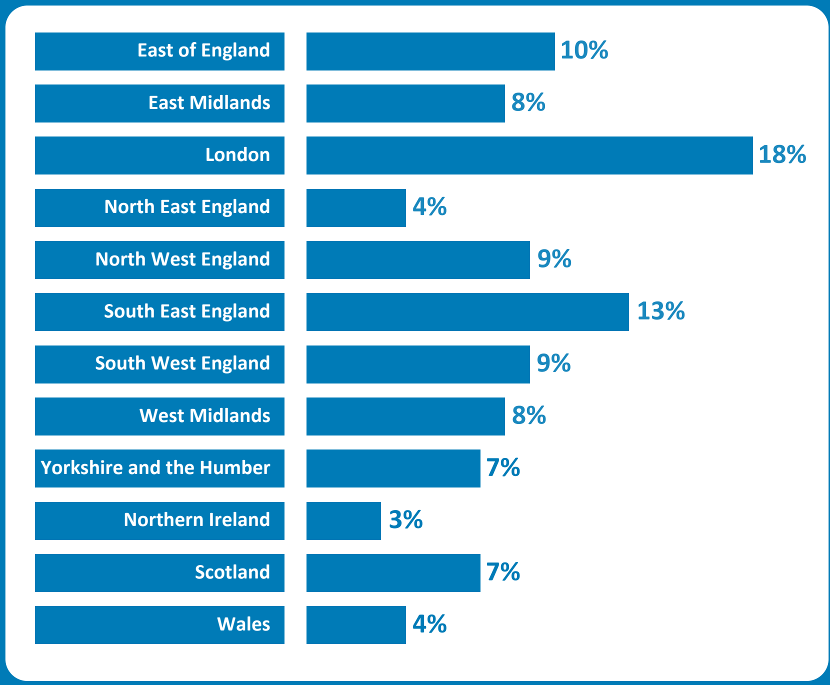
As well as the different types of events organised across the UK, the data collected also reveals the contribution outdoor events make by UK region. Based upon an analysis of where the survey respondents said that they had attended outdoor events in 2018, Table 2.3 summarises the totals by nation and region.

Nation and Region	Total Attendances	Total Spend	Spend per event visit	GVA Contribution	Employment
England	(millions)	(£ millions)	(£)	(£ millions)	(FTE jobs)
East of England	13.9	3,290	236.60	2,555	48,390
East Midlands	12.0	3,184	190.64	2,286	44,376
London	24.9	8,394	336.96	6,486	126,717
North East England	5.9	1,608	271.47	1,248	23,335
North West England	12.7	4,305	338.26	3,314	69,130
South East England	17.8	4,281	240.42	3,314	63,095
South West England	12.5	3,092	246.89	2,348	43,999
West Midlands	11.1	2,705	242.94	2,102	40,829
Yorkshire & Humber	10.4	2,396	231.46	1,854	35,066
Northern Ireland	4.2	1,494	354.49	1,140	23,279
Scotland	10.2	3,538	347.61	2,758	52,801
Wales	5.8	1,237	212.27	961	18,083
Total	141.5	39,523	279.33	30,367	589,099

Table 2.3 Regional and national contributions

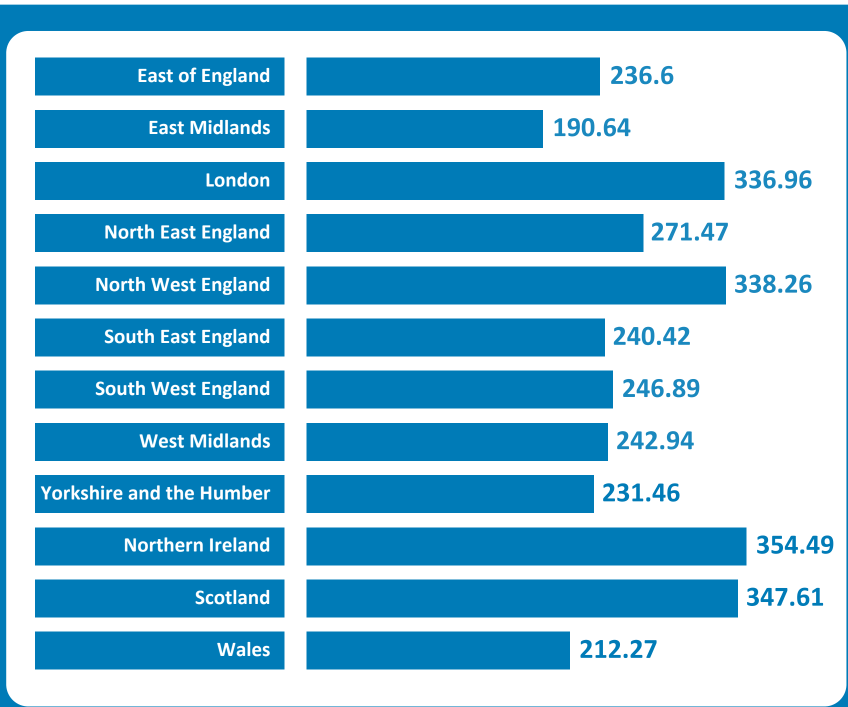
Table 2.3 shows that the 141.5 million event attendances are reasonably spread geographically and broadly reflect the UK's population concentrations, with London having the highest attendances (Figure 2.17).

Figure 2.17: Total Attendances by nation and region (%)



Attendance figures do not necessarily reflect the economic contribution made by outdoor events to each nation and region (Figure 2.18). Figure 2.18 identifies that the spend per visit to outdoor events by region is different, with Northern Ireland and Scotland being the highest.

Figure 2.18: Average spend by event visit (£) by nation and region



The total spend on outdoor events by region is illustrated as a percentage of the total spend on outdoor events in figure 2.19. London outdoor events encourage the highest spend on outdoor events, at 21%. The North West of England and South East of England being the next highest contributors, at 11% each.

Figure 2.19: Share of total spend by nation and region

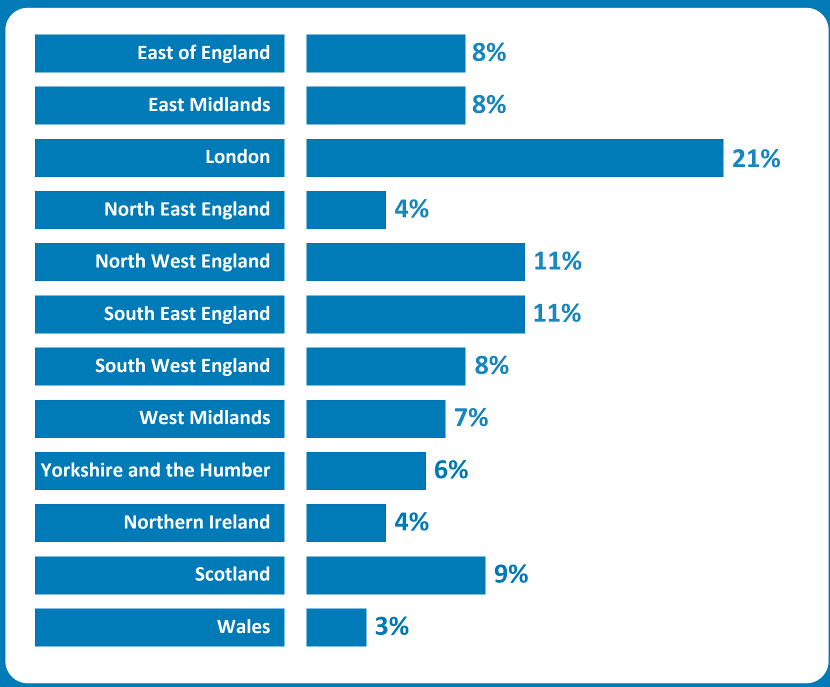
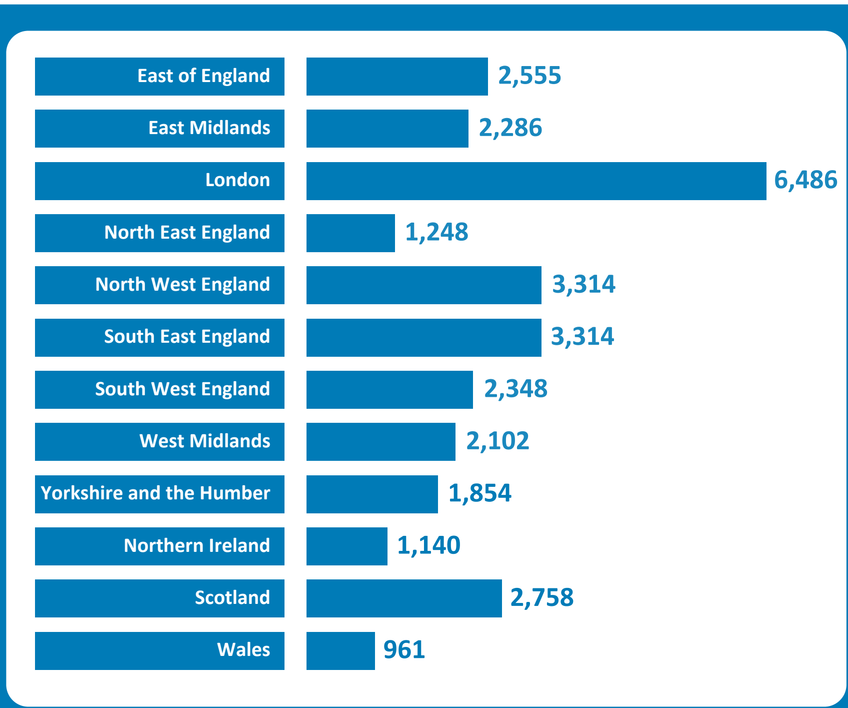
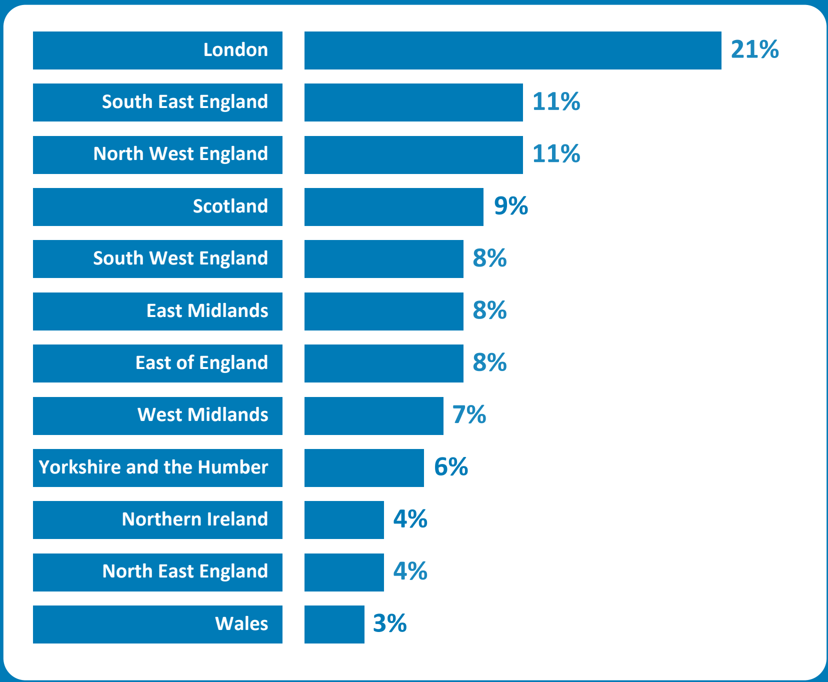


Figure 2.20: GVA by nation and region (£ millions)



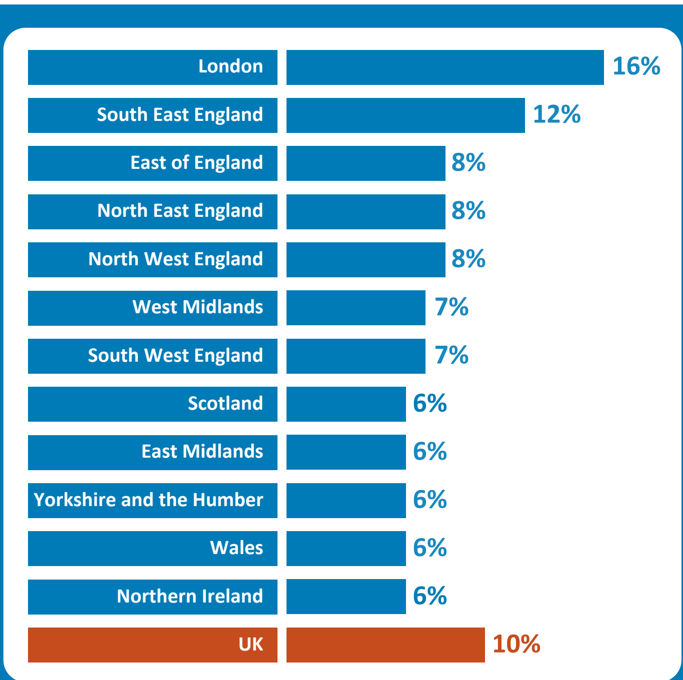
Overall GVA figures show that outdoor events in London make the greatest contribution to the UK economy (Figures 2.20 and 2.21). Indeed, in terms of total GVA contribution, London is nearly twice as important as the nearest region (Figure 2.21).

Figure 2.21: GVA by nation and region (%)



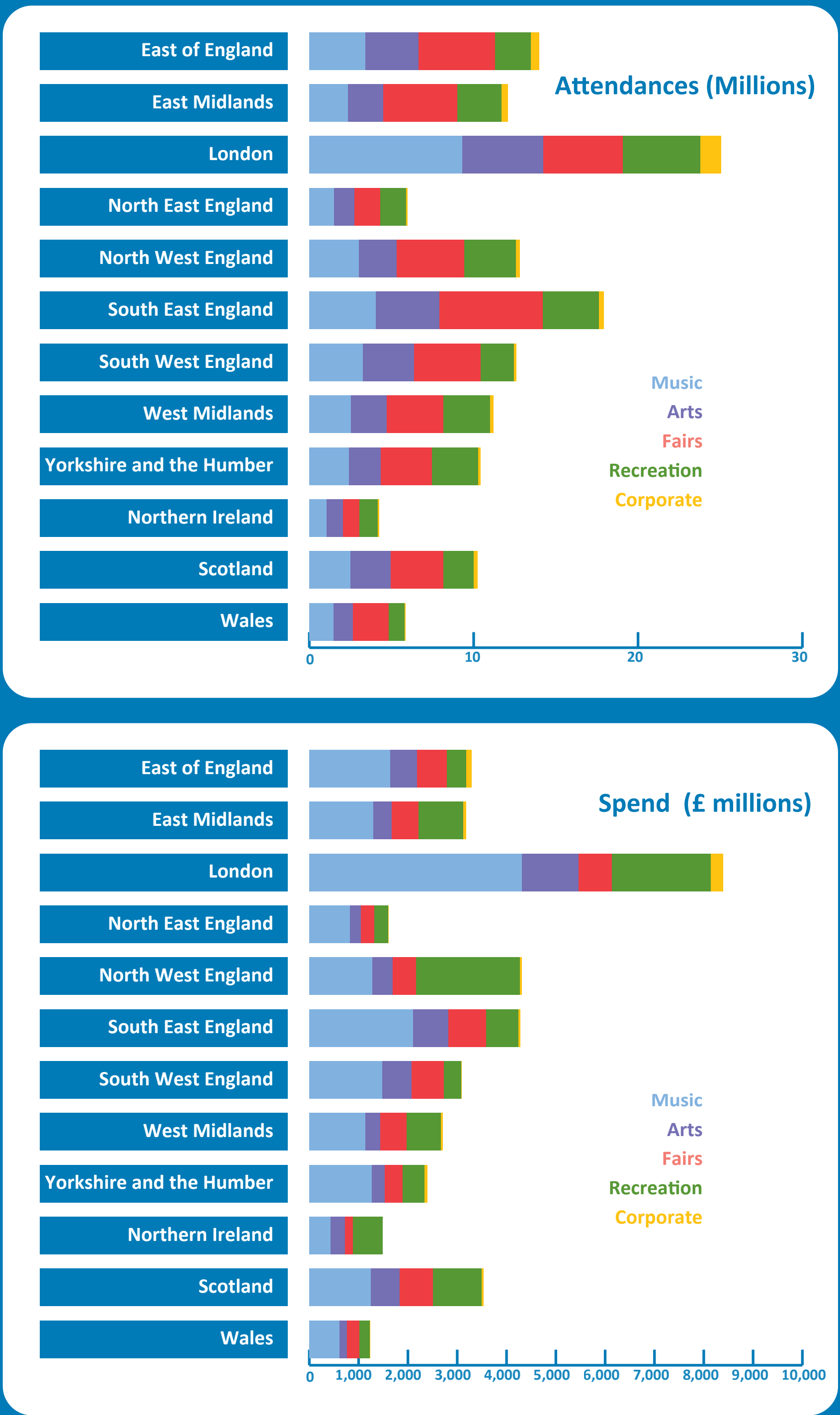
Compared to other DCMS sector GVA percentages (Figure 2.22), London is still the highest contributor followed by the South East region, but outdoor events in the North West outperform their DCMS position (Figure 2.21).

Figure 2.22: Proportion of DCMS sectors (excluding Tourism and Civil Society) GVA to all sectors, by region: 2017 (Source: DCMS, 2019b, p.6)



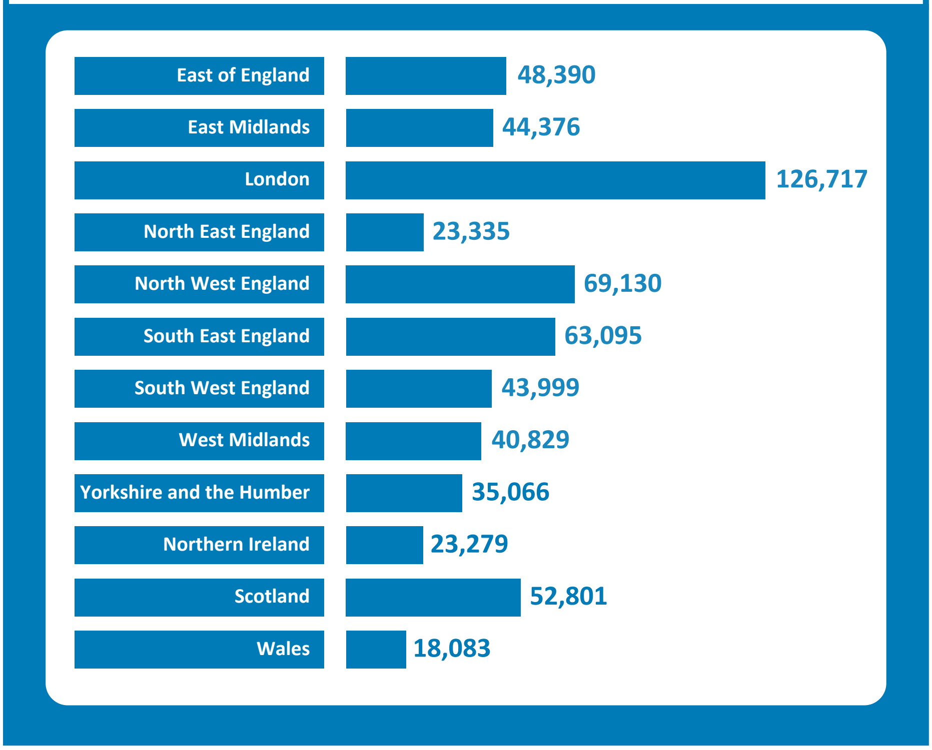
Looking at the different types of outdoor events by region (Figure 2.23), it can be seen that music events in London have a significant effect on the overall contribution that outdoor events have in the English capital.

Figure: 2.23 Spend and attendance by type of event for each nation and region



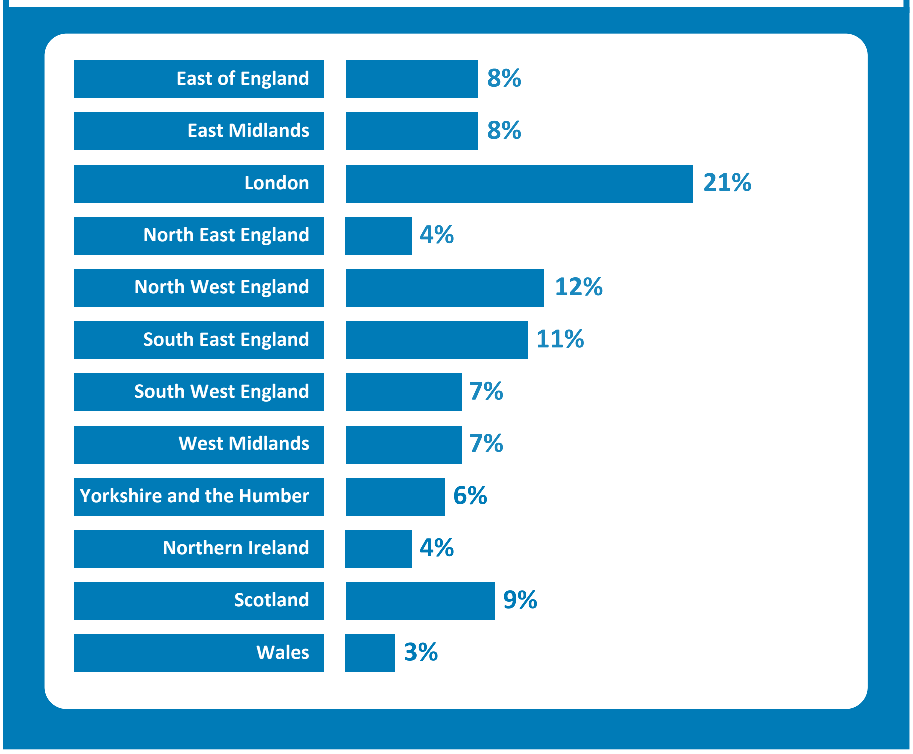
The influence outdoor events have on the different geographical locations is further detailed in Section 4 of this report.

Figure 2.24: Employment by nation and English region (FTE jobs)



The contribution of outdoor events to employment by nation and region (Figures 2.24 and 2.25) further demonstrates the power of these events in contributing to local economies, particularly in London, the North West, South East and Scotland.

Figure 2.25: Employment by nation and English region (% of FTE jobs)



As demonstrated in this Section, the economic contribution of outdoor events is related directly to the amount of money spent by attendees.

The GVA and FTE figures resulting from attendances and spend highlight that the sector is potentially an important one in comparison with other DCMS sectors (Table 2.8).

The economic contribution outdoor events make to local economies is only part of the equation and does not capture the extent to which these events are important, socioculturally.

Events are organised for a variety of reasons and for some the expenditure is only important in terms of covering the direct costs of organisation, or even less, if subsidised by grant aid, sponsorship or direct patronage. It is, therefore, important to understand if outdoor events are meaningful to the UK population and what negative effects that they might have.

The following Section outlines the findings of this part of the study.

3. Sociocultural contributions and challenges

3.1 Overall sociocultural findings

Events touch most people personally as well as the communities in which they live, work, study and play.

Outdoor events can more directly affect people because they are not hidden behind closed doors. Whilst it is important to know what contribution they make to the economy; it is also essential to understand their contribution to the fabric of communities and to every individual.

The economic and sociocultural benefits of events are not mutually exclusive. They are important to the economy because they support businesses and people's employment. These in turn affect people's well-being and ability to enjoy themselves.

The overall findings of this study were that outdoor events are important to individuals personally and even more so to their wider communities.

Motivations and perceptions of outdoor events to the UK population were obtained by presenting respondents with a number of statements and asking them to rate them using a Likert scale, from strongly disagree to strongly agree. The statements included items that can be classed as negatives about outdoor events (Appendix 7.2) such as congestion, over commercialisation, environmental deprivation and safety and security. However, whilst these were recognised as issues, most respondents believed that these items were being well managed.

The findings are outlined in the following Sub-sections.

3.2 Personal benefits

The key findings from the survey reveal that outdoor events are important to people's lives in many ways.

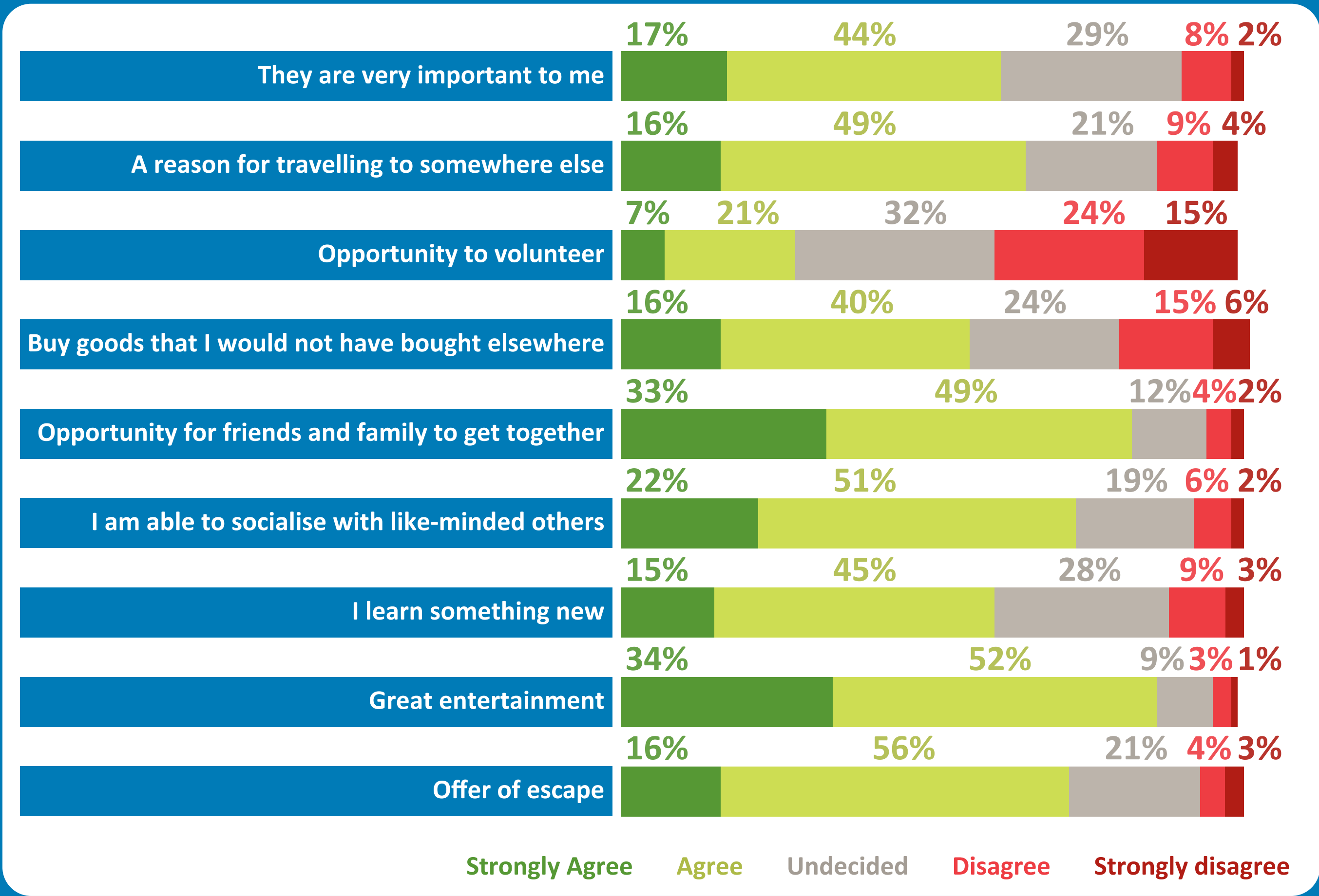
Over 70% agreed, or strongly agreed, that outdoor events were relevant to them, particularly because they offered great entertainment, opportunities for socialisation and escape (Table 3.1).

Statement	%
Great entertainment	87
An opportunity for friends and family to get together	82
An opportunity to socialise with like-minded people	73
Escape	72

Table 3.1: The overall % agreement with personal statements

Indeed, the overall results in Figure 3.1. illustrate that there are few negative perceptions about the importance of outdoor events.

Figure 3.1: Motivations for attending outdoor events



For most, the opportunity to volunteer is not seen as an important reason to attend outdoor events, although it was a positive for 30% of respondents.

For over 60% of the population, outdoor events are deemed to be very important to them.

3.3 Community benefits

The fact that 70+% of respondents agreed or, strongly agreed, that outdoor events were important to their community (Table 3.2) underlines their socio-economic benefit.

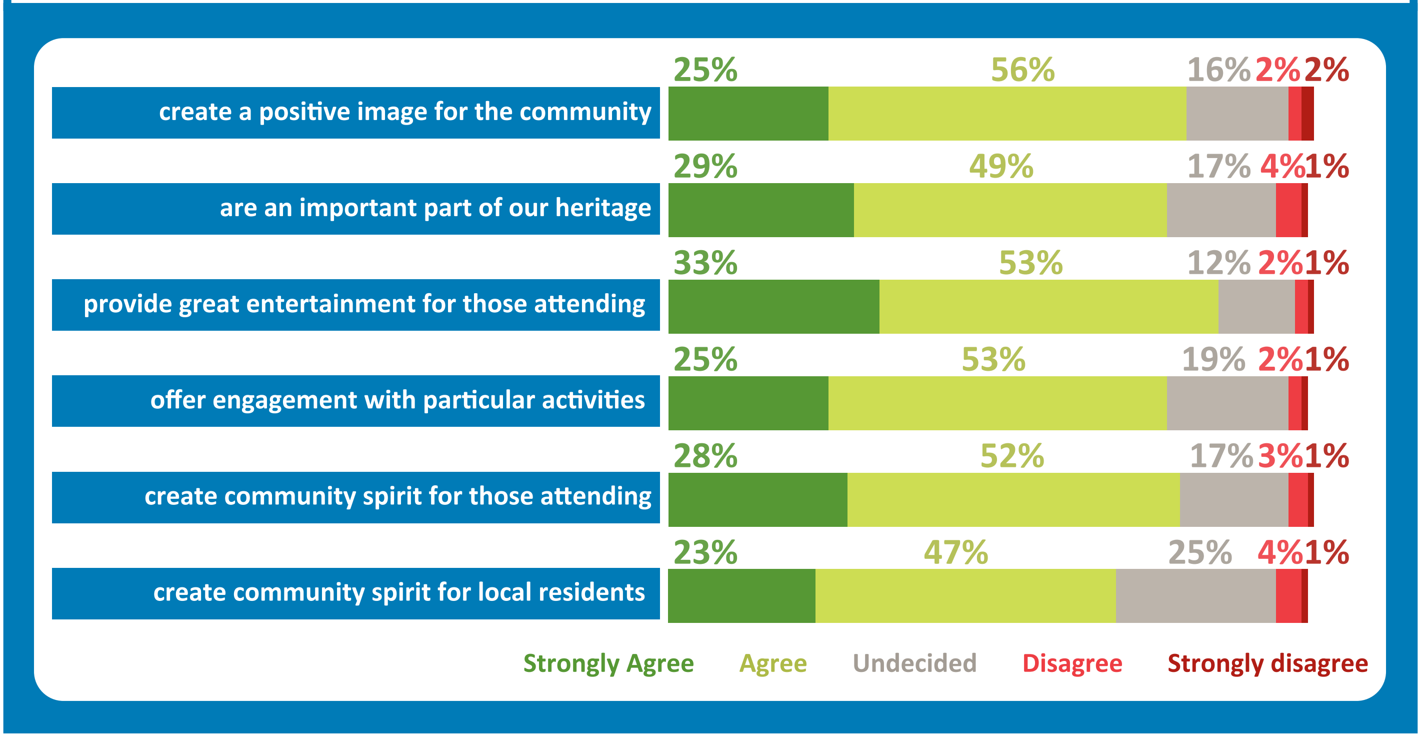
Generally, outdoor events were seen as providing entertainment and an opportunity for all to engage with the particular form of activity at the event (e.g. music, art, physical activity or nature) as well as being important for the local economy. They were also seen as a source of community spirit and pride, helping to create a positive image for the location and helping to safeguard heritage and traditions.

Statement about outdoor events	% Strongly/Agree
They provide great entertainment for those attending	86
They provide additional customers for local businesses	81
They create a positive image for the community/destination where they are located	80
They create a sense of community spirit and pride for those attending	79
They offer invaluable opportunities for engagement with particular activities (e.g. music, art, physical activity, nature)	78
They are an important part of our heritage and traditions	78
They offer a feeling of optimism and joy for all involved	77
They are inclusive and enable all those who wish to attend to do so	75
They create a sense of community spirit and pride for local residents	70

Table 3.2: High agreement with statements about the importance of outdoor events

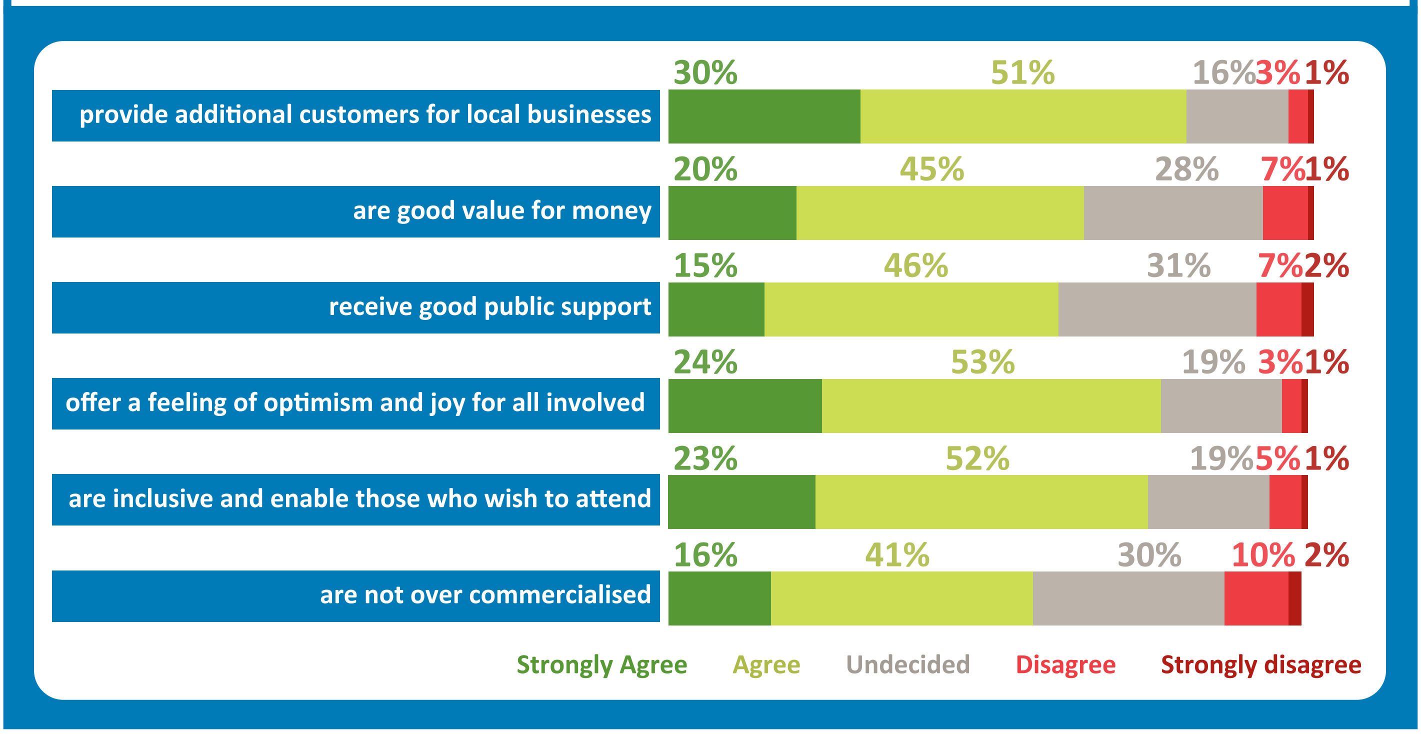
The following Figures (3.2 and 3.3) display the views of the respondents to the value of outdoor events. People value outdoor events for a number of reasons, especially for their content and their sense of community. People are less able to comment on the value as a local resident but only 5% of respondents felt that outdoor events do not create a sense of pride or positive image for the host community.

Figure 3.2: Agreement with statements about the sociocultural contributions of events



Attitudes towards outdoor events are generally positive, with only a small percentage feeling negative about their value for money or over commercialisation (Figure 3.3).

Figure 3.3: What people value about outdoor events in general



One area the industry might benefit from addressing is the perception that the media and politicians etc. could give greater support to events.

3.4 Management contributions

People have positive perceptions about the management of outdoor events and how they affect them, their communities and the wider society and economy (Table 3.3). 84% of respondents agreed, or strongly agreed, that they were satisfied with the outdoor events that they attended.

There is also general agreement that outdoor events are creative and attractive and offer good quality activities. This quality is related to the good design and layout of events which make them accessible, safe and secure. Staffing levels at events were also deemed as adequate.

Statement	% Strongly/Agree
I am satisfied with the events as an attendee	84
the events are creative and attractive	80
the activities at the events are of good quality	79
the layout of event sites are clear and accessible	77
they are safe and secure	72
staffing levels are adequate	72

Table 3.3: Those statements related to management with over 70% agreement

The majority of respondents were also affirmative about the way that outdoor events are managed (Figure 3.4).

The only areas of concern, for a minority of people, are around the acknowledged issues of antisocial behaviour, congestion, waste and over commercialisation. Coping with weather conditions, given the nature of outdoor events, is also seen as an area that could be better managed. The problems identified are not necessarily of the outdoor event organiser's doing but are ones that they have the challenge of managing.

Figure 3.4: Perceptions of the management of outdoor events

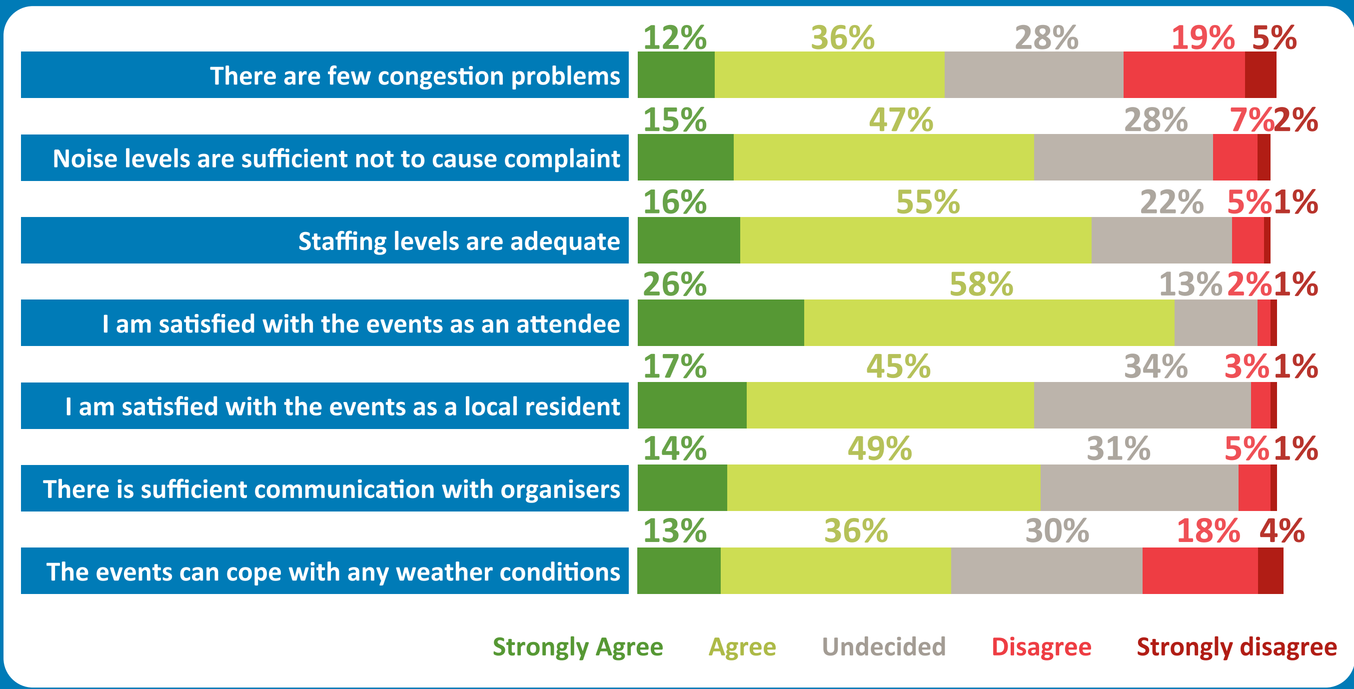
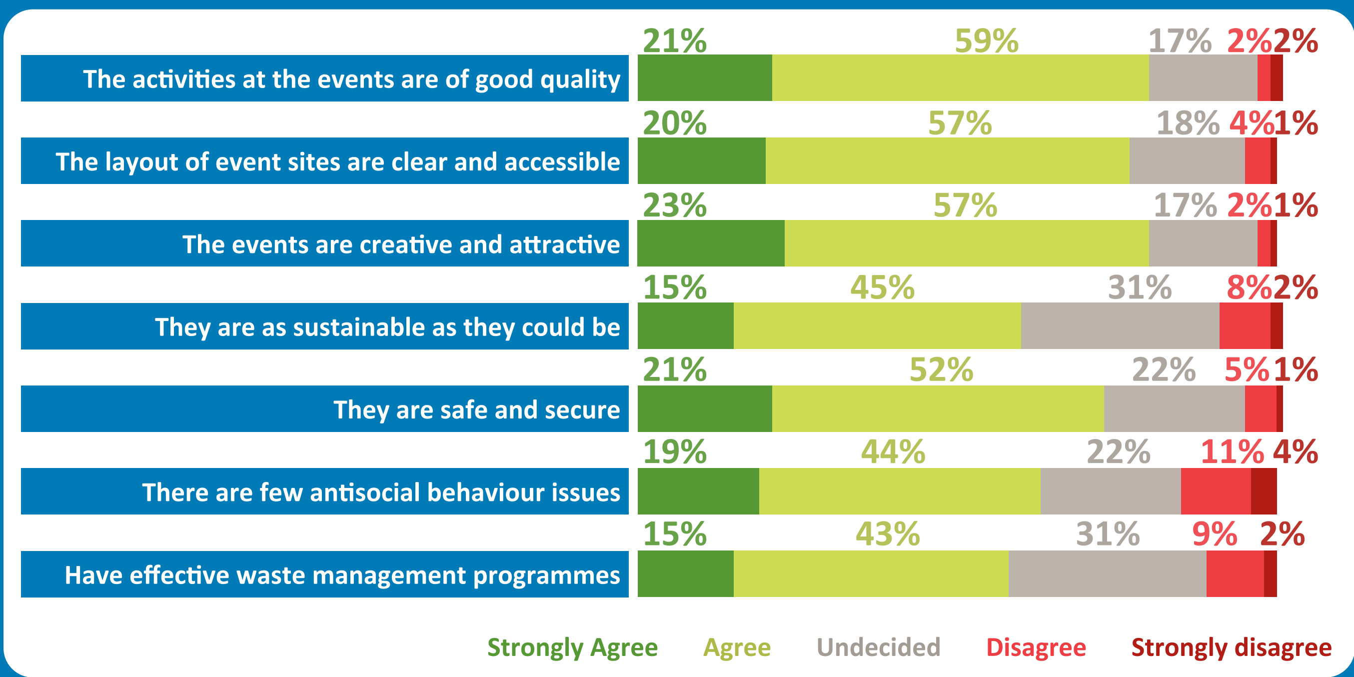


Figure 3.5: Perceptions of outdoor events



Overall people are satisfied with the events that they attend, which offer good quality content, in creative and attractive sites that are well staffed, safe and secure. Some of the negative effects of outdoor events are further discussed in the following Section.

3.5 Management challenges

For event organisers, there were a number of areas which the research highlighted as negatives with respondents. These were those statements that had less than 50% agreement, or over 10% disagreement (Table 3.4).

Statement	% Strongly/ Disagree
Opportunity to volunteer	39
Few congestion problems	24
Can cope with any weather conditions (e.g. heavy rain, extreme heat)	21
Opportunity to buy goods that I would not have bought elsewhere	20
Few antisocial behaviour issues (e.g. crime, noise)	15
A reason for travelling to somewhere else	14
Not over commercialised	13
Effective waste management programmes in place	11
I learn something new	11

Table 3.4: Statements scoring a lower level of agreement

These general views will not apply to all events and in some cases may result from perceptions rather than realities. However, they are pointers to issues that event organisers should pay attention to, although there will not always be solutions because they relate to wider society challenges.

3.5.1 Volunteering

The highest negative response was disagreement with the statement that outdoor events offer the opportunity to volunteer. This could be because people did not want to volunteer and wanted to attend the event rather than there being a lack of opportunities.

One recommendation could be for outdoor events to work with organisations who provide volunteering opportunities. In the festival area there are a number of such companies as well as charitable organisations, such as Oxfam and Greenpeace, all of which organise different types of volunteering. There are also specialist volunteer roles that are provided to support events, such as welfare and medical services.

It could be that the benefits of volunteering just need better promotion and communication. Research identifies that volunteering not only offers opportunities for event access but also for socialising with other volunteers and skills development.

3.5.2 Congestion

The temporary nature of outdoor events and the number of people attending over a short period of time inevitably tends to lead to congestion issues, which are the second highest of the negatives. Road closures, as well as the traffic caused by build-up and break down, can also affect local residents.

Some of these issues can be addressed, at least in part, through good communication with residents and by encouraging those travelling to events to use public transport or by helping to facilitate and encourage lift sharing etc.

Good and well organised traffic management, including during build up and break down, can also help to allay concerns.

3.5.3 Weather

The vagaries of the British weather, which can swing from heatwave to knee deep mud, present increasing problems for organisers and visitors. While providing shelter for large numbers may not be an option for many outdoor events, encouraging visitors to come prepared is an increasingly important role organisers need to address. Also, making sure that those working on event sites are aware of the risks from the weather (which can range from heat stroke to hypothermia), and how to deal with them, is important, particularly given the impacts of climate change.

3.5.4 Anti-social concerns

Noise and anti-social behaviour were perceived as a problem by 15% of respondents which may be more based on perception than fact. The reality is that outdoor events are generally well managed in this respect and both noise levels and security are generally key factors in obtaining a licence.

There are also a number of information sharing initiatives that exist to support event organisers and police forces across the country in dealing with crime and behavioural issues that can happen in and around events. These include the National Events Intelligence Unit, supported by the National Police Chiefs' Council, which provides intelligence and advice to both organisers and local police forces.

Some crime and behavioural issues are more prevalent in particular types of outdoor event (e.g. drugs and alcohol abuse). This is more related to the demographics at music events where perceptions are that substances will enhance the experience. There is little evidence to suggest that behaviour at outdoor music festivals, for example, are different to those at indoor music events.

3.5.5 Environmental Issues

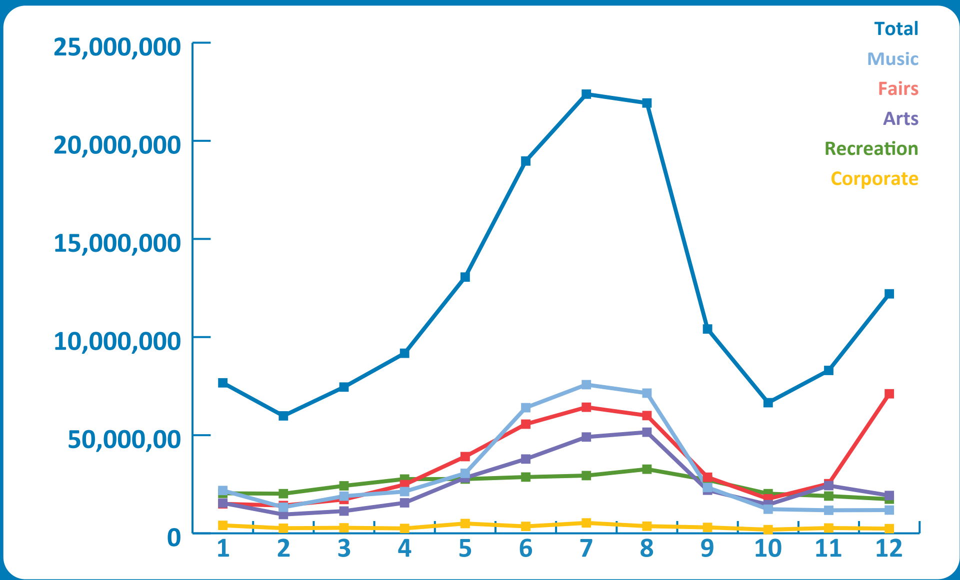
Few environmental issues were raised by the respondents as being a problem, apart from that of waste management, which may reflect the huge amount of work being done by many organisers to address their carbon footprint. These range from general initiatives and organisations such as Julie's Bicycle and Positive Impacts, to sub-sector type schemes such as A Greener Festival.

Waste management, through recycling, reusing and reducing is more visible, compared with energy use, so may be why this was identified as something requiring further investigation. Greater sharing of initiatives such as Festival Vision:2025, and the work of Powerful Thinking, not only with event organisers but with event visitors, would further communicate the positive ways in which collaboration can reduce the negative environmental impacts of outdoor events.

4. Outdoor Event Characteristics

4.1 Seasonality

Figure 4.1: Number of event type visits per month (2018), including totals line

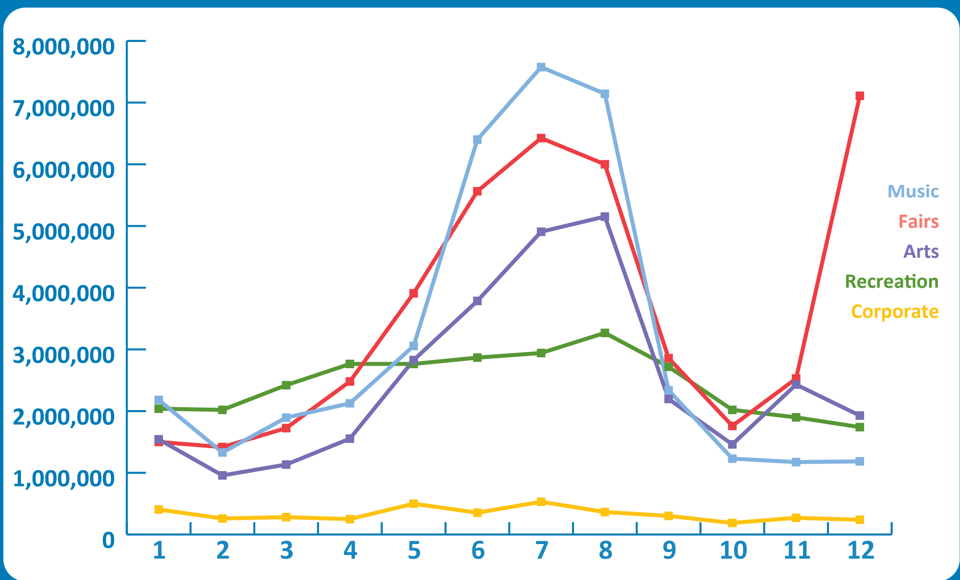


As might be expected, the dominance of outdoor events in the summer months is evident in the orange line in Figure 4.1. The attendance at outdoor events coincides with better weather (which was significant in 2018) and school holidays.

One notable factor is the growth of outdoor winter events, such as festivals of light and Christmas markets.

Figure 4.2 provides a more detailed view of the pattern of attendance across the different types of outdoor events.

Figure 4.2: Number of visits by type of outdoor event (2018)



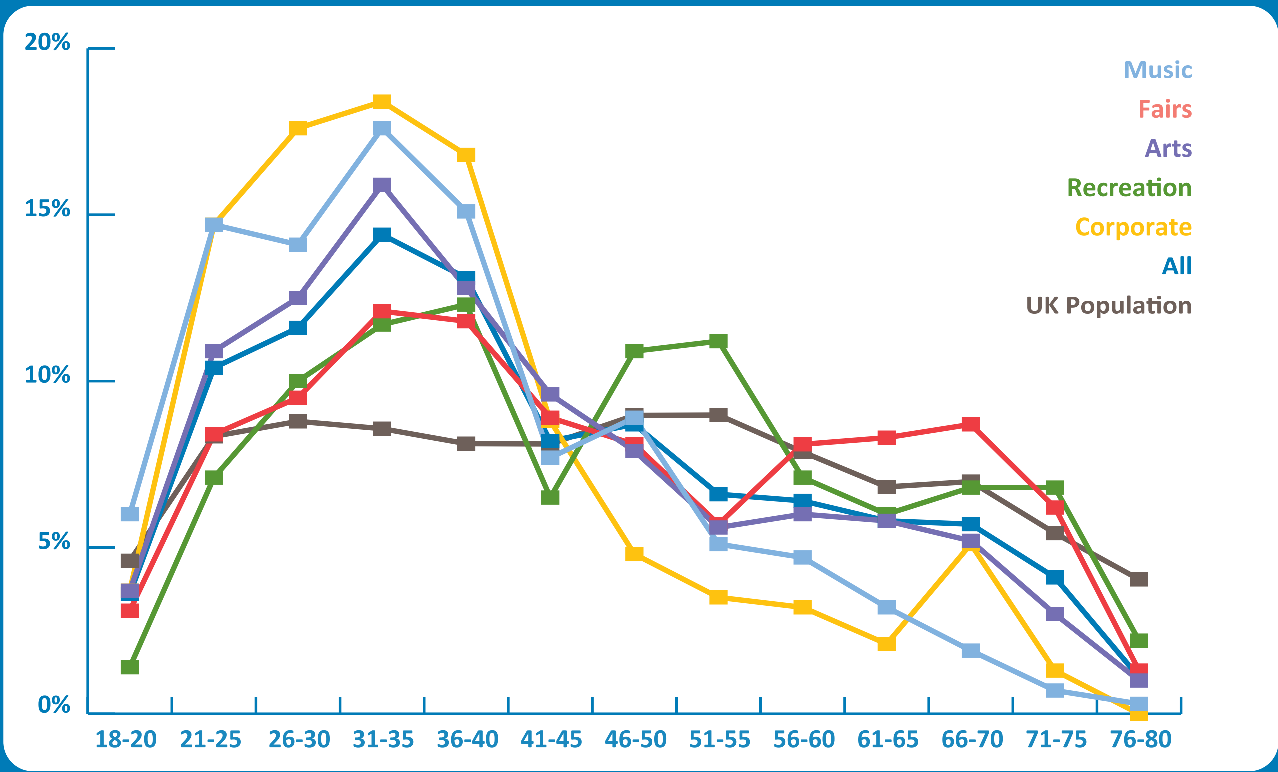
The fair category of outdoor events (the green line in Figure 4.2), which includes Christmas markets, is very evident by its increase in attendances from November, through to December. The creation of such events has enabled the outdoor event season to extend beyond the key Summer months. It is also increasingly being recognised that these types of event can have a major effect in drawing people into town and City centres, which can significantly improve footfall for shops and restaurants, thus helping local business economies.

4.2 Demographic profile of outdoor events

4.2.1 Age profile of event attendees by type of event

Outdoor events are more attractive to the young and middle adult population, as demonstrated by the orange line of the total average across the different types of event, compared to the dark blue line of the population itself (Figure 4.3). These are currently known as the generations Y (millennials born 1980-1994), and X (born 1965-1979).

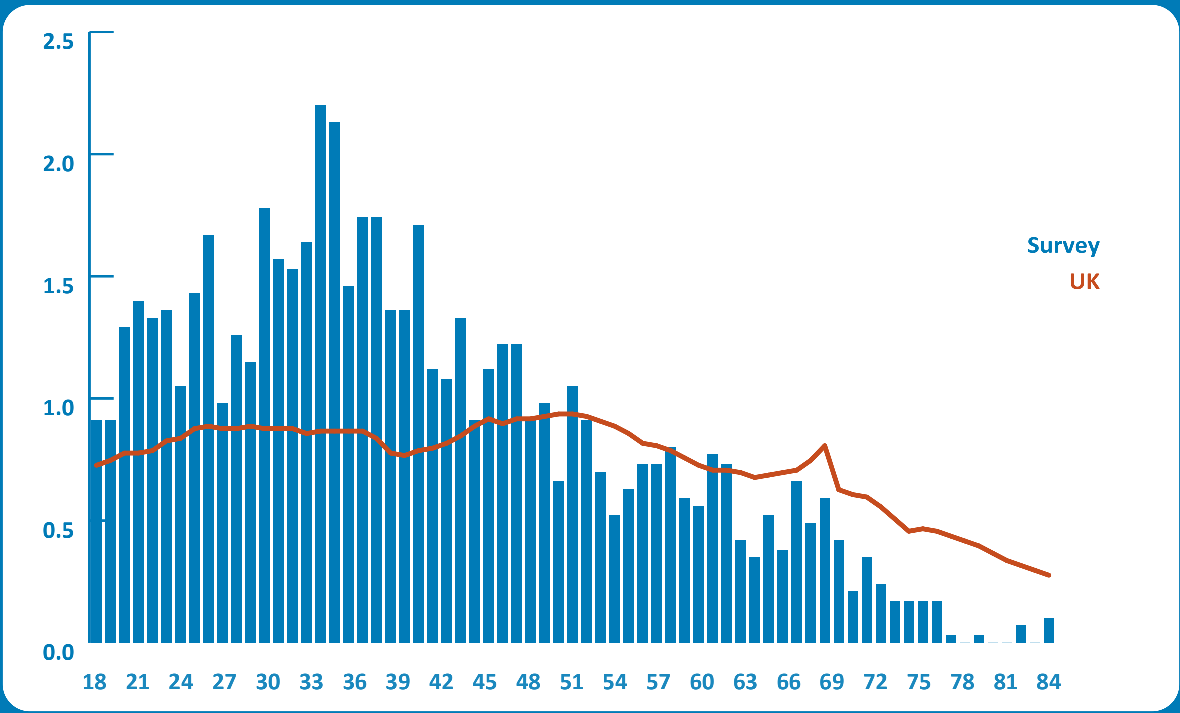
Figure 4.3: Share of Outdoor Event Attendances by Age Category



4.2.2 Gender profile of outdoor event attendees

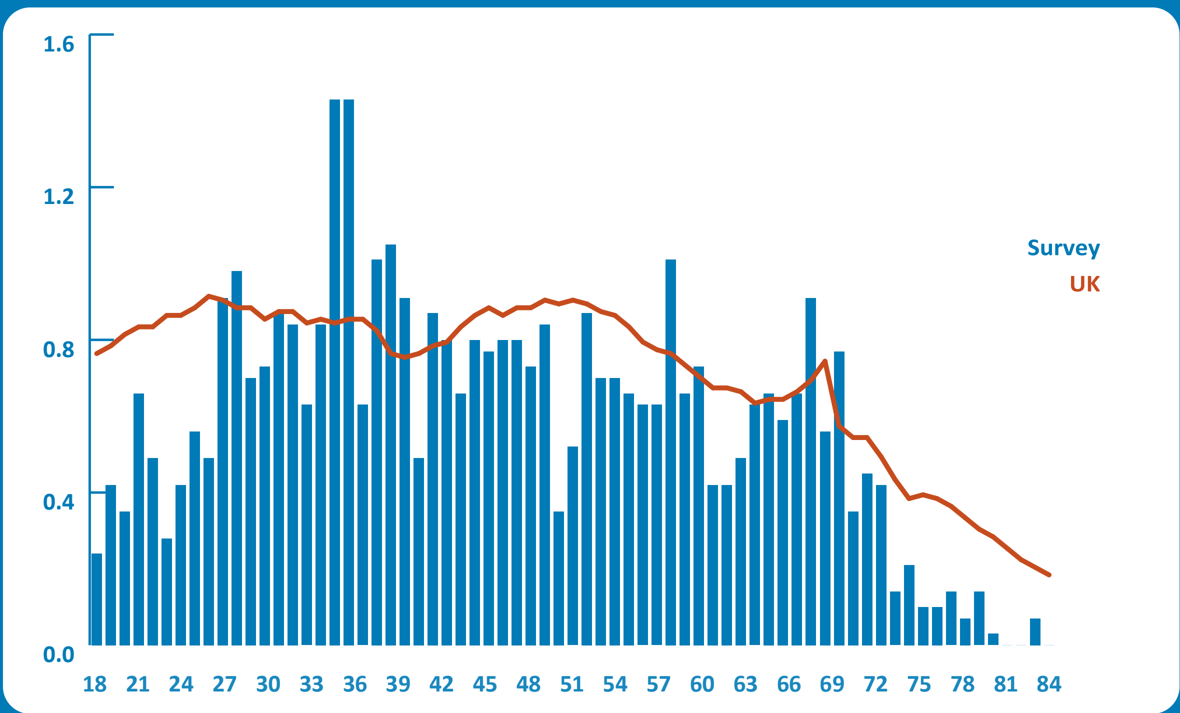
Of those respondents who had attended a UK outdoor event in 2018, 40% were male and 59% female. Figures 4.4 and 4.5 illustrate the age profile by gender in comparison to the UK population.

Figure 4.4: Percentage of females attending outdoor events by age category



These figures illustrate that female attendees are dominated by the younger age groups, whilst male attendees reflect more closely the UK population as a whole.

Figure 4.5: Percentage of males attending outdoor events by age category (%)

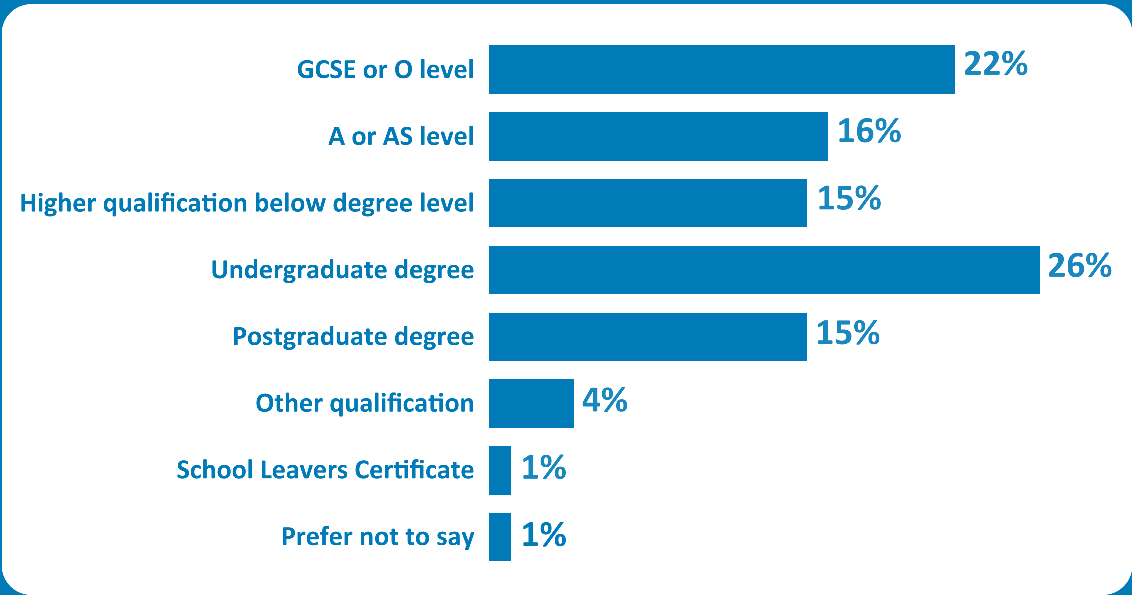


Further analysis of the demographic profile of different types of outdoor event may uncover explanations for these differences. This highlights the need for further research to understand the demographic make-up of different types of event and the challenges of having a diverse background of event attendees.

4.2.3 Educational profile of event attendees

Of those respondents who had attended a UK outdoor event in 2018, the majority are well educated.

Figure 4.6: Highest educational levels of those attending outdoor events



4.3 Findings by type of outdoor event

This Sub-section displays the results of the overall contributions and demographic characteristics of the different types of outdoor events for those readers with an interest in this detail.

4.3.1 Music Concerts and Festivals

4.3.1.1 Economic contribution of music events

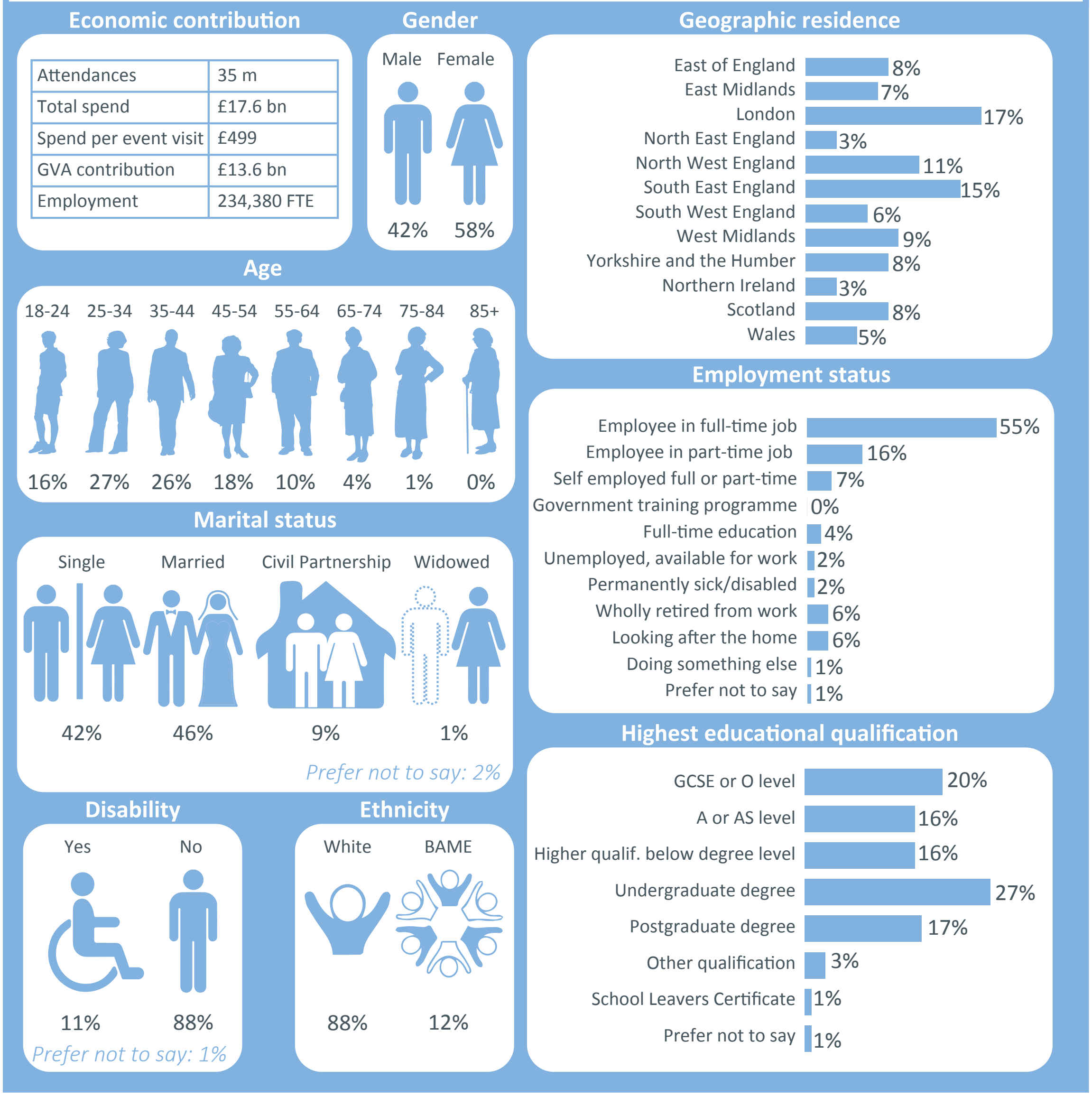
This type of event category provided the greatest economic contribution to the total of outdoor events market in 2018 (Table 2.2).

Attendances	35.3 million
Total spend	£17,606 million
Spend per event visit	£499.13
GVA contribution	£13,588 million
Employment	234,380 FTE

Table 4.1: Summary of economic contribution of outdoor music events

4.3.1.2 Demographic profile of attendees of music events

Figure 4.7: Demographic profile of attendees of outdoor music events



More females attend outdoor music events (Figure 4.7) than the UK population (51%) but less than arts events (64%) and fairs (62%).

Figure 4.7 also illustrates the age profile of those who attend music events. Compared with the other types of outdoor events, the age range is younger (Figure 4.3).

Music events attract people from across the UK, with most from the highest population regions of London and South East England and least from Northern Ireland and North East England (Appendix 7.2).

Those who attend music events are mainly employed and well educated.

Of those attending music concerts and festivals, 11% identified themselves with some form of disability. This is lower than the population figure of 19% but significant in terms of the number of people in the whole population.

Similarly, those who identify themselves as from one of the black, Asian and minority ethnic groups (BAME) is lower than the UK population (19.5%).

The majority of those attending music festivals are married or in a civil partnership. The official way of identifying marital status does not measure those who are in a relationship or who people attended events with. This data is more easily collected at an individual event level.

4.3.2 Arts and Cultural Events

4.3.2.1 Economic contribution of arts events

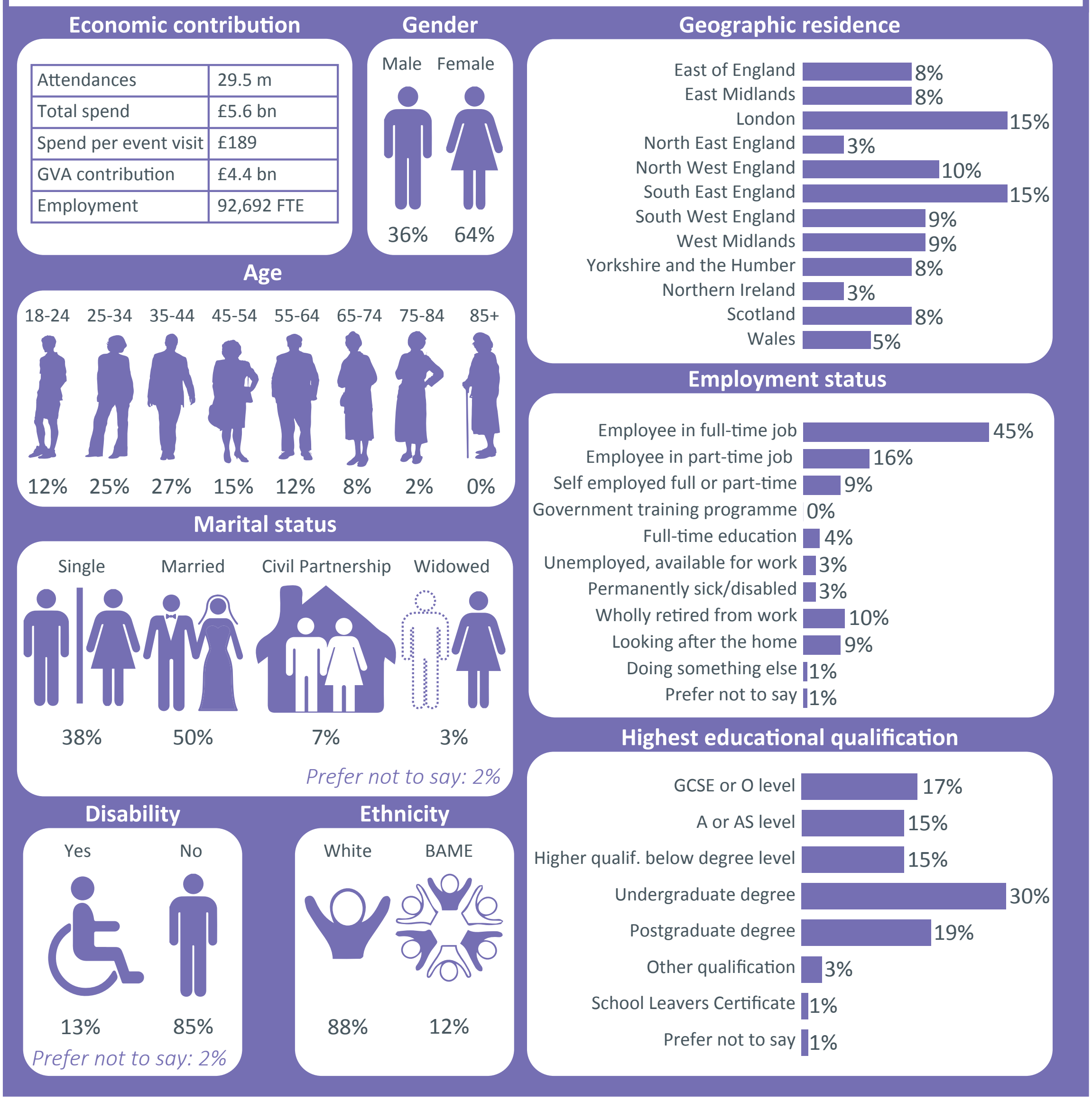
Attendances	29.5 million
Total spend	£5,590 million
Spend per event visit	£189.22
GVA contribution	£4,384 million
Employment	92,692 FTE

Table 4.2: Summary of economic contribution of outdoor arts events

4.3.1.2 Demographic profile of attendees of arts events

The gender profile of those attending arts events is female dominated (Figure 4.8). This is similar to arts activity attendance in general.

Figure 4.8: Demographic profile of attendees of outdoor arts events



The age profile of those attending arts events is older than music festivals (Figure 4.7) but still younger than the UK population as a whole (Figure 4.3).

4.3.3 Fairs, Shows and Rallies

4.3.3.1 Economic contribution of fairs

Attendances	43.3 million
Total spend	£5,994 million
Spend per event visit	£138.51
GVA contribution	£4,695 million
Employment	81,501 FTE

Table 4.3 Summary of economic contribution of outdoor fairs events

4.3.3.2 Demographic profile of attendees of fairs

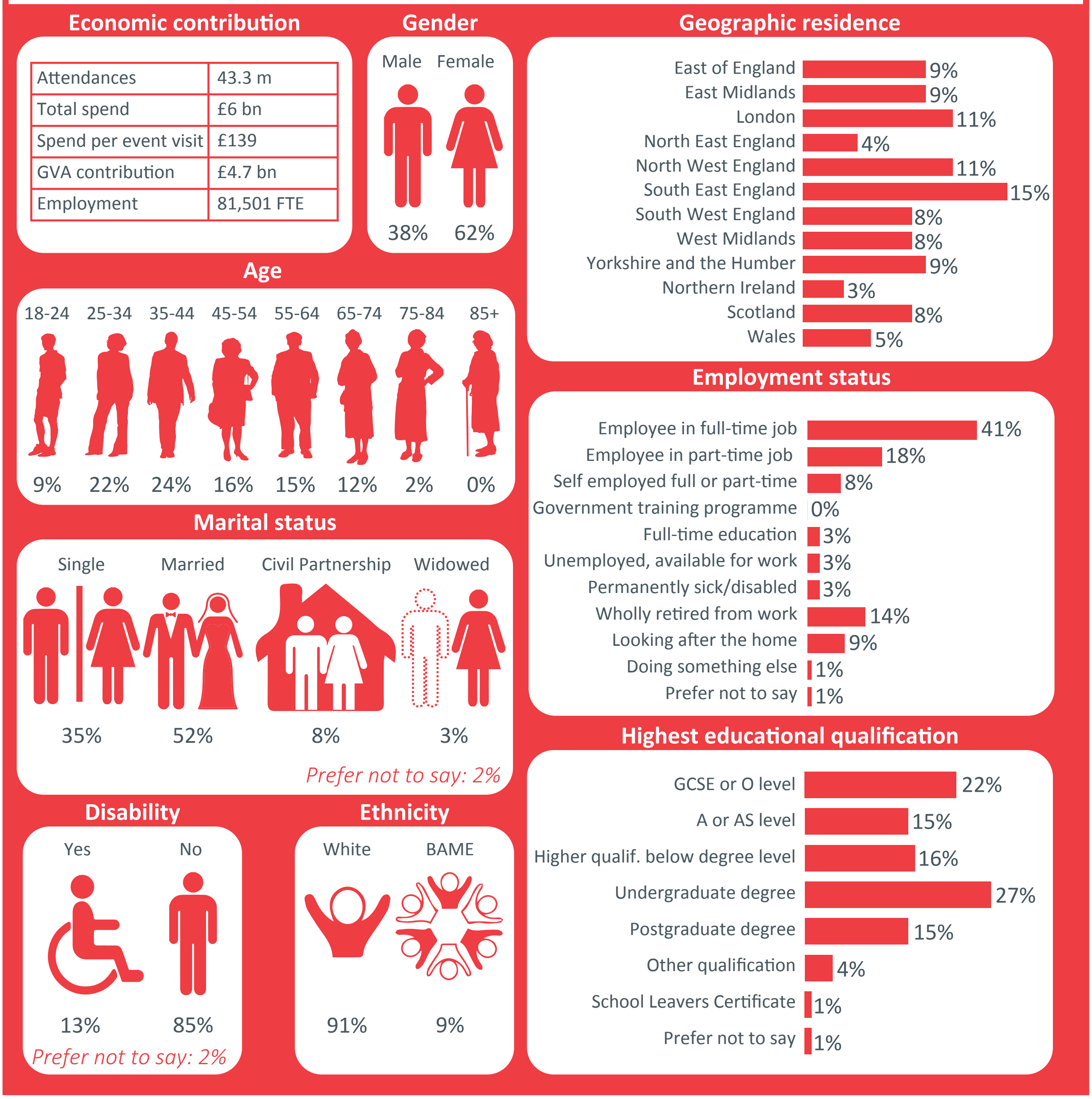


Figure 4.9: Demographic profile of attendees of outdoor fair events

4.3.4 Recreation Events

4.3.4.1 Economic contribution of recreation events

Attendances	29.5 million
Total spend	£9,643 million
Spend per event visit	£327.31
GVA contribution	£7,166 million
Employment	168,269 FTE

Table 4.4: Summary of economic contribution of outdoor recreation events

4.3.4.2 Demographic profile of attendees of recreation events

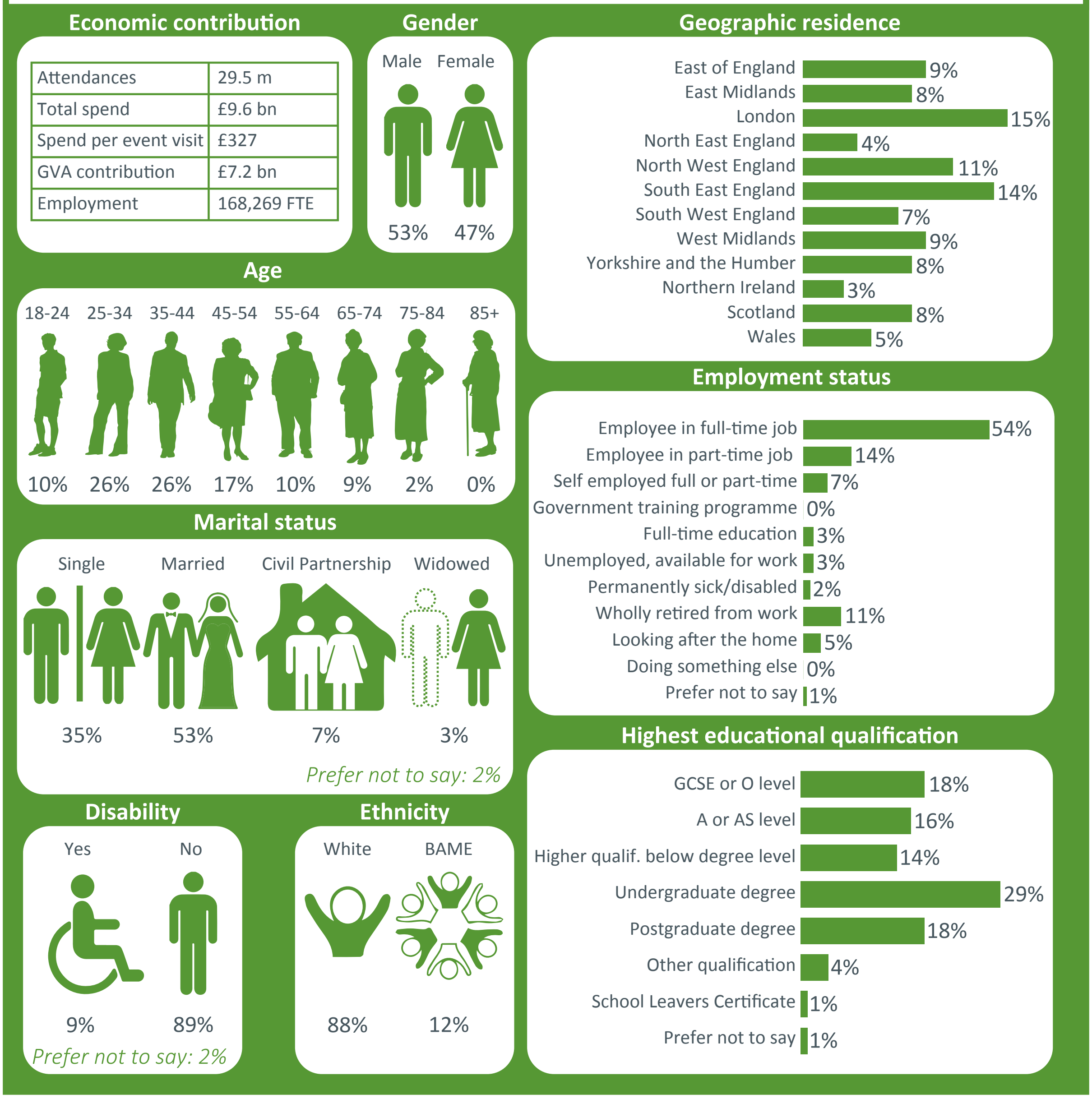


Figure 4.10: Demographic profile of attendees of outdoor recreation events

4.3.5 Corporate Events

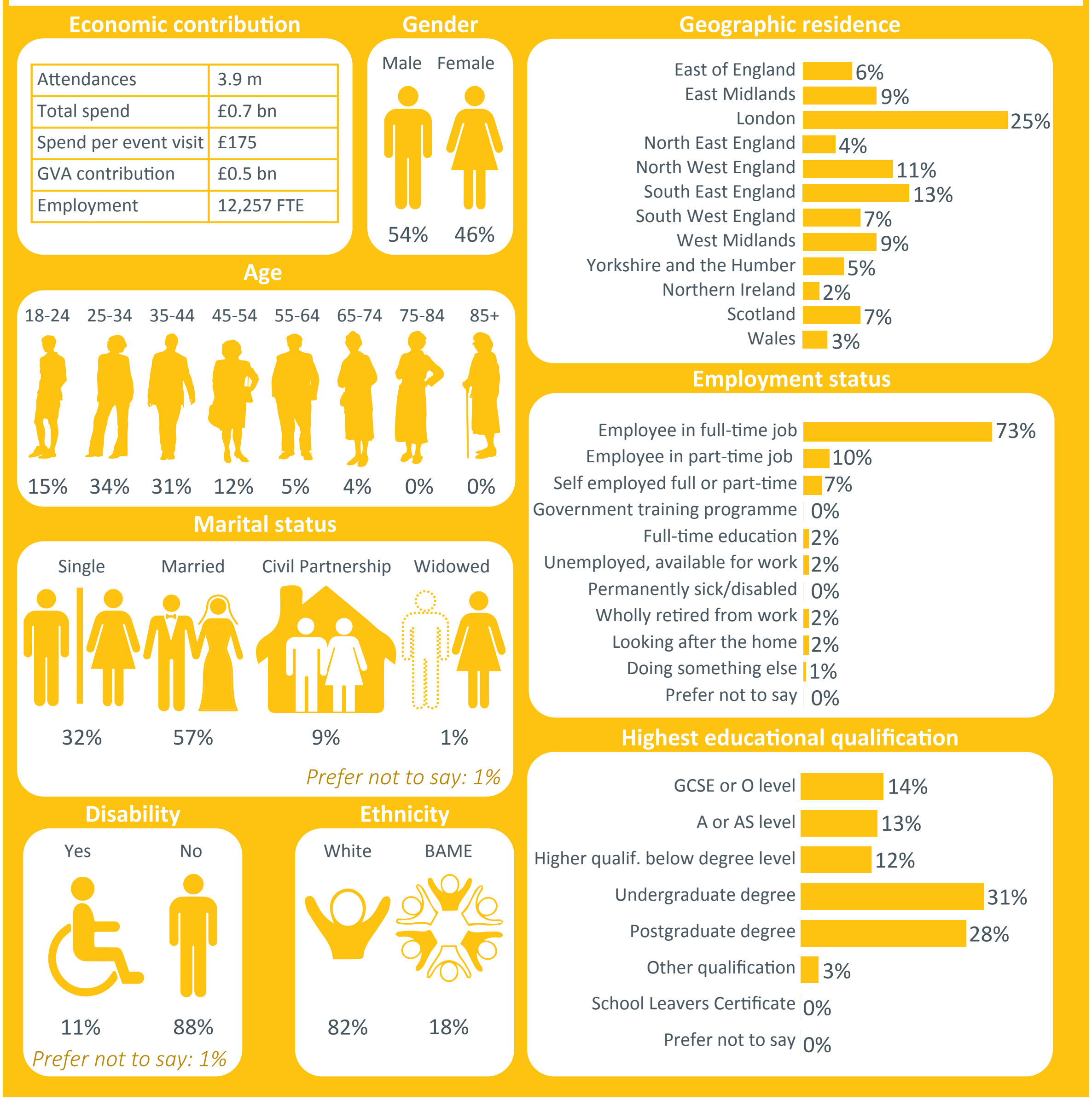
4.3.5.1 Economic contribution of corporate events

Attendances	3.9 million
Total spend	£690 million
Spend per event visit	£175.16
GVA contribution	£534 million
Employment	12,257 FTE

Table 4.5: Summary of economic contribution of outdoor corporate events

4.3.5.2 Demographic profile of attendees of corporate event

Figure 4.11: Demographic profile of attendees of outdoor corporate events



The demographics of each type of outdoor event generally reflect those of the UK population as a whole, although there are slight differences that relate to the nature of the event itself. Those events, such as music festivals, are attended more by single and younger members of the population, compared to corporate events which are attended by those who are married and have a higher level of employment.

5. Recommendations

The findings from this study go some way to providing a foundation for future and further studies of the outdoor event sector across the UK. They demonstrate the contribution that outdoor events make to the UK economy and their sociocultural significance to individuals, communities and organisations.

- There is a strong case to be made for the event industry to be provided with separate SIC and SOC codes which would enable it to access similar industry and employment data as other sectors, especially those under the auspices of DCMS.

- The broader data that would be collected through the ONS could usefully be supplemented with more detailed research on particular issues affecting the outdoor sector.

- As events are generally not competitive, there is a strong case to be made for better sharing of learning and information between organisers for the benefit of the industry. This could include the sharing of commercial data (such as ticketing sales), perhaps through an independent third-party, which would provide an accurate way of monitoring the health of the industry.

- The way that the growth of winter outdoor events, such as Christmas markets, has managed to influence the seasonality of attendance at events, demonstrates that it is possible to generate business outside of the peak summer months. Similar initiatives could be undertaken at core times, such as other school holidays.

- The industry could do more to generate positive PR and encourage a more supportive approach from politicians, the media and other opinion formers. This could help to counter the negatives and misconceptions that some people have about events and also encourage politicians, both local and national, to better understand the socio-economic contribution that the industry makes both locally and nationally.

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7. Appendices

Appendix 7.1: Categorisation of types of outdoor events

Table 7.1 illustrates how the five categories of outdoor event was created and how it can be directly compared with secondary data from the Visit Britain GB day visitor survey data. Details of the study categories can be found in table 1.1.

Study category of outdoor event	GB day visitor survey classification (Visit Britain)	EIF list of events in research brief
1. Music concert or festival	A music festival AND a live music concert	Music festivals
2. Arts or cultural festival/show/fete/ carnival/parade	Arts\cultural festival (e.g. a book festival)	Air shows; Carnivals, Fun Days and Community Fairs; Film Festivals outside only; Firework Displays; Historical Events; Music, Theatre outside, concerts, Performing and Display Arts all outside only [NB music in 1.]; non-music festivals; Street Art Events
3. Fair/exhibition/trade show/rally	outdoor fair\ exhibition\show (e.g. gardening or agricultural show) AND food\local produce event (e.g. food festival, farmers market)	Agricultural Shows (including town and county shows); Flower Shows and Gardening Events; Markets specialist ones (i.e. food events); fun fairs; Pet and Animal Shows; Steam Rallies and Country Fairs
4. Recreational and sporting events/ tournaments/ regattas	n/a Sporting events are covered separately and is dominated by stadia events	Highland Games
5. Corporate events	n/a Covered separately as meetings and conventions which are predominantly business and not public events	

Table 7.1. Creation of the categories of type of outdoor events

Those identified by the GB Tourism and day visitor survey classifications that were omitted because they do not represent outdoor events was an indoor exhibition such as Ideal Home, a motor show or holiday exhibition. The classification of live music concert was added to category 1 of outdoor music event. The category of 'other' was omitted from the final survey after the pilot stage because of the complications of identify what these were and collecting data on attendance and spend.

Appendix 7.2 Methods

Measuring the contribution of outdoor events relies upon an approach to value. For this study the value of outdoor events was assumed to be based upon two main identifiers, economic and sociocultural. In this study a traditional approach was undertaken to measuring the economic contribution of the outdoor event sector, based upon the spending behaviour of a representative sample of UK residents at, and going to, different types of outdoor events in 2018. Beyond the economic, a more holistic approach was taken that recognises the social capital afforded by outdoor events. The sociocultural contribution included community identity, social cohesion, recreational opportunity, the development of local enterprise, improvement of public facilities and amenities and the conveyance of knowledge about the history and heritage of an area. (Robertson, Rogers & Leask, 2009; Yuruk, Akyol & Simsek, 2017). The research also recognised the challenges of outdoor events and people's perception of these were questioned. This included environmental and management issues that are seen as the negative or disbenefits from the literature and industry communications.

An on-line questionnaire was created, and a representative sample of the UK population was surveyed at the end of January 2019, using CINT panel members, on their attendance, expenditure, attitudes and perceptions of UK outdoor events in 2018. It is acknowledged that memory recall and generalisations across all outdoor events will have limited the accuracy of the data. A regular monthly or fortnightly survey that only asked about recent visits was not possible within the time-frame available. It was not feasible to ask respondents about every trip to every event in the past 12 months and asking respondents to choose an event to provide answers for was likely to lead to a recall bias towards larger events. It was the most accurate way of collecting information on outdoor event behaviours, expenditures and perceptions without undertaking a more costly and regular survey. This may be something that the sector looks to start in the future.

7.2.1 The Sample

A representative sample of 4,463 respondents was achieved. After cleaning the data, 4,435 usable responses have been gathered, of which 2,995 respondents had been to at least one outdoor event in 2018. This sample size Is large enough to give a 95% confidence interval of +/- 4.1% to the overall results. Modifications were made for those who had included non-2018 events (e.g. Glastonbury) and overseas events. A small adjustment was also made to recognise overseas visitors. The figures displayed in this report have been grossed up from ONS population data.

Nation and Region	Outdoor Event Attendees	UK
East of England	8.6%	9.4%
East Midlands	8.0%	7.2%
London	13.1%	13.5%
North East England	3.4%	4.0%
North West England	11.3%	10.9%
South East England	14.8%	13.8%
South West England	7.9%	8.4%
West Midlands	8.6%	8.8%
Yorkshire and the Humber	8.8%	8.2%
Northern Ireland	3.0%	2.8%
Scotland	7.8%	8.2%
Wales	4.8%	4.7%

Table 7.2: Geographical comparison of study participants and UK population

7.2.2 The survey

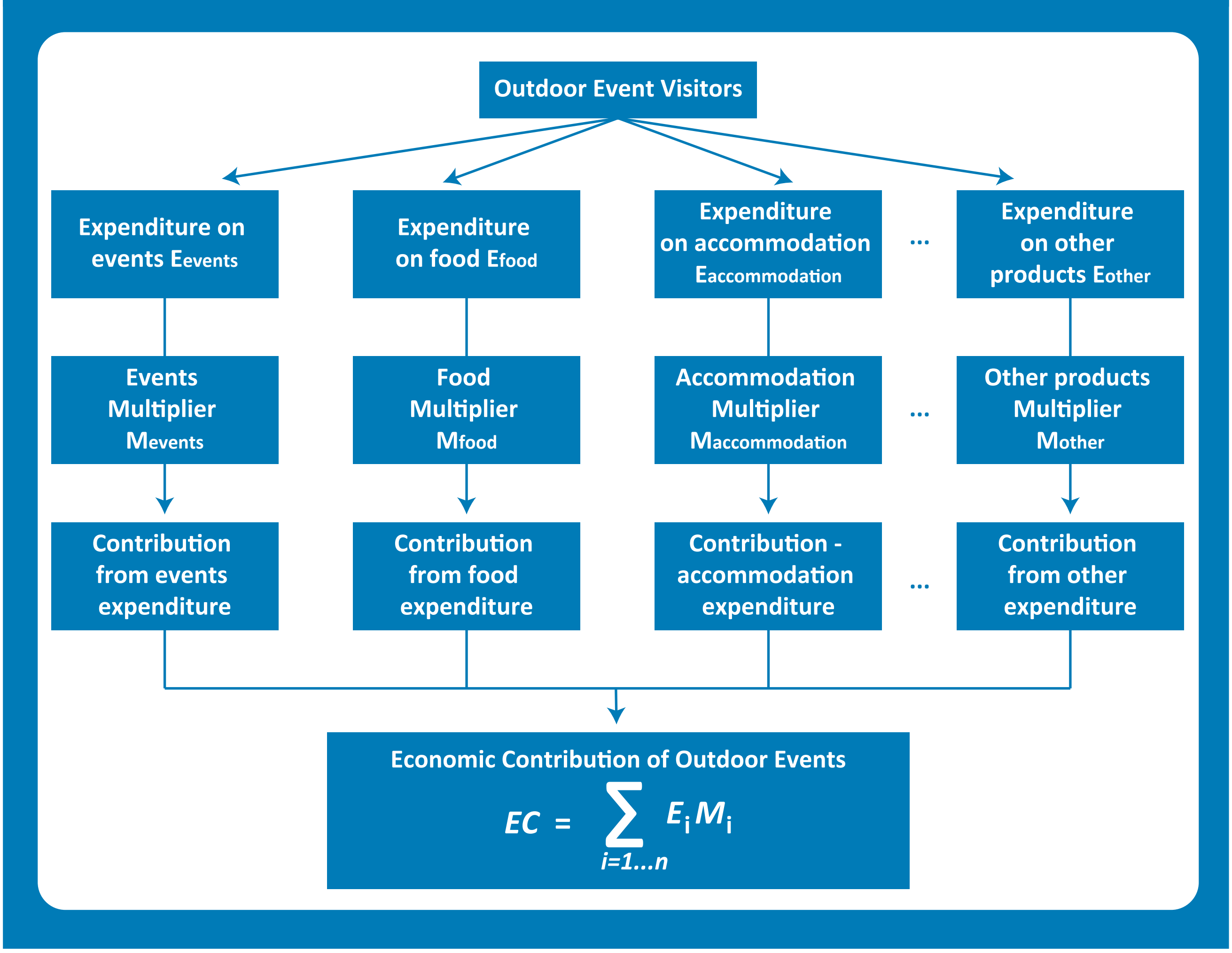
Event economic contribution measures the gross value added (GVA) and employment that exists because of events. This treats events as a demand-side activity in a manner consistent with the treatment of tourism in tourism satellite accounting. All expenditures of visitors to (in this case, outdoor) events were accounted for, with the direct and indirect contributions to GVA and employment counted at each stage.

Calculating economic contribution of a demand side activity differs from the more conventional calculation of (supply side) industry GVA and employment by defining the activity as being the demand activity (visiting an outdoor event) rather than by a single product being produced. This approach was undertaken because of the lack of secondary supply side SIC and SOC data available from the Office for National Statistics (ONS) ONS. There was also an insufficient number of outdoor event impact studies to calculate the value of outdoor events in the UK. The focus has tended to be on individual event assessment as reinforced by the guidance of the ONS *Measuring Tourism Locally. Guidance Note Six: Event Analysis and Evaluation* and the EventIMPACTS toolkits. The methodology for this research project works from a UK-wide rather than from an individual event perspective.

All income earned as a result of outdoor events in the firms which event visitors purchase goods or services from is included in direct gross value added (GVA), and jobs that exist in those firms because of the spending by outdoor event visitors are included in direct employment. Indirect GVA and employment counts the income earnt and jobs created in supply chains in successive rounds of input purchases, and total economic contribution and employment adds up the direct and indirect incomes and jobs.

Questions were therefore asked of a representative sample of the UK population about their 2018 outdoor event experiences in an on-line survey. The data derived from their answers were treated in the following ways as depicted in Figure 7.1.

Figure 7.1: Flow chart depicting how the economic contribution was calculated



Based on the above, economic contribution can then be defined as:

$$EC = \sum_{i=1 \dots n} E_i M_i$$

This is where for n products purchased, E_i is the expenditure by event visitors on product i, and M_i is the multiplier for the industry producing product i. While M_i is calculated at the UK level for industries included in the UK Input Output tables produced by ONS. Economic contribution is calculated by type of event t and by region r. The details of the multiplier figures used for this analysis are further explained in Data Analysis below. The results are given in Section 2 of this report.

Alongside information on the types of events attended, the on-site and off-site expenditures, the survey asked respondents about their views on the sociocultural value of outdoor events to themselves, their communities and their perceptions of their challenges. This was achieved through several Likert scale agreements to statements that were derived from a variety of sources, including previous research and industry commentaries. Figure 7.2 summarises what the topics were that these statements were based upon.

Figure 7.2: Factors covered in the sociocultural statements in the survey (Source: Kim, Jun, Walker & Drane, 2015, p.24)

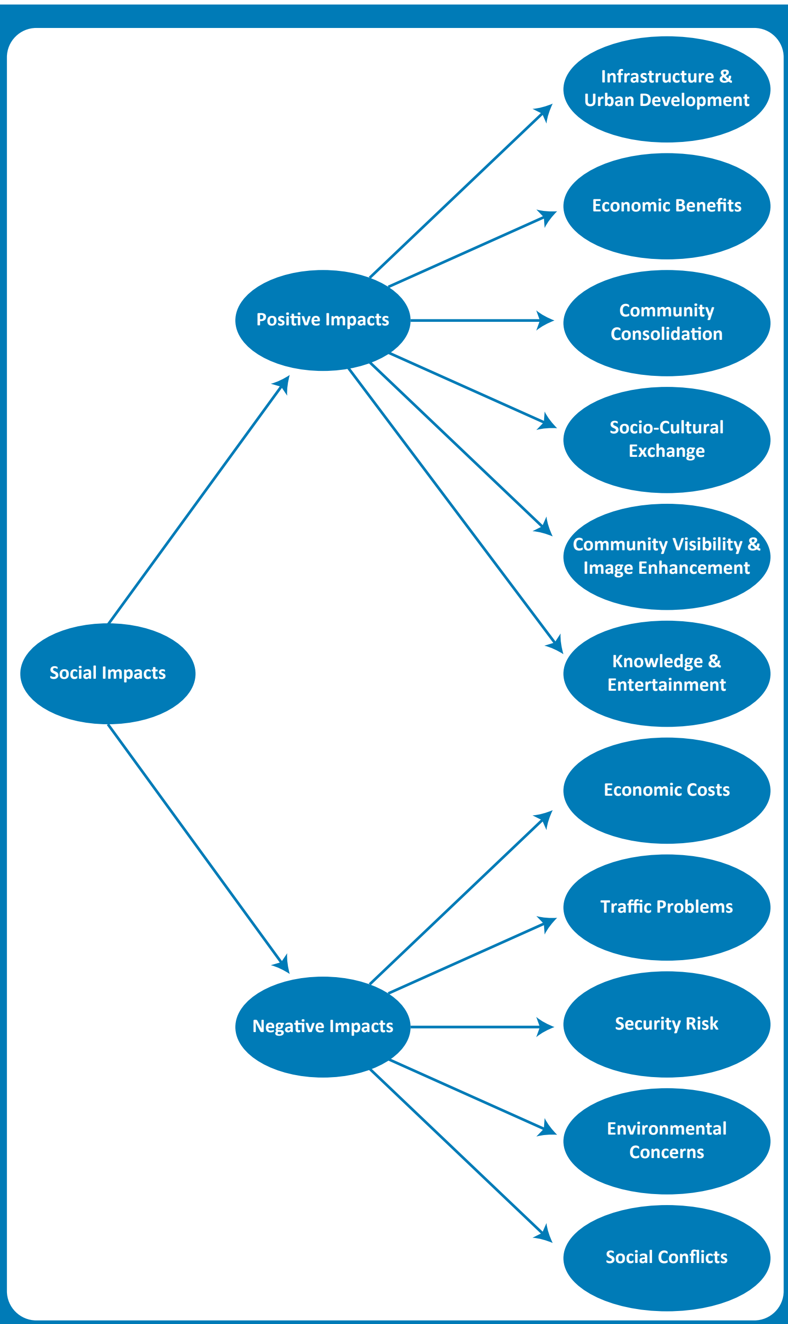


Figure 7.2 identifies what factors were identified as possible benefits and disbenefits of creating the sociocultural value of outdoor events. The results are covered in Section 3 of this report.

7.2.3 Data analysis

Data from the ONS Analytical Input-Output tables[1] gives direct and indirect multipliers for GVA and compensation of employees (COE)[2]. These are used to calculate the GVA and COE from the event expenditures measured in the demand side survey.

1

https://www.ons.gov.uk/economy/nationalaccounts/supplyandusetables/datasets/ukinputoutputanalyticaltablesdetailed

2

Note that the ONS terms the ratio between total and direct effects as the multiplier, and the income earnt or compensation of employees per unit of sales as the 'effect'. The ratio multiplier is ignored in this analysis, and the 'effect' per unit of sales is used in the more commonly used sense of being the 'multiplier'.

The simple average of GVA multipliers across all 106 UK industries identified by the ONS is 0.779, meaning that for every pound spent on products produced in the UK, 77.9p is earnt as income to employees, shareholders or the government through taxation. The remaining 22.1p is spent on imports at some stage in supply chains. The average for service sectors is higher (0.841). There is relatively little variation in multipliers between similar sectors, e.g. between accommodation (0.775) and food and beverages (0.792) or between Creative, arts and entertainment services (0.844), Libraries, archives, museums and other cultural services (0.890) and Sports services and amusement and recreation services (0.810).

Expenditures identified in the demand survey on are then multiplied by relevant multipliers from the ONS tables, with for example, both food and drink expenditure (onsite and offsite) using the multiplier for food and beverage serving services, and entertainment using the multiplier for creative, arts and entertainment services. Expenditure on tickets are treated differently for the five types of outdoor events, with ticket expenditures for music and fair events using the multiplier for creative, arts and entertainment services; ticket expenditures for arts events using the average of the multipliers for creative, arts and entertainment services and Libraries, archives, museums and other cultural services; and ticket expenditures for recreation and corporate events using the multiplier for Sports services and amusement and recreation services.

Employment results use the same methodology with COE multipliers to calculate the compensation of employees for each type of expenditure, but then regional differences in wages are accounted for by using ONS data on regional wages by industry.

GVA and COE multipliers for event ticket expenditures are created from an average of private, government and non-profit figures from the UK Analytical Input-Output tables. The categories chosen are from: creative, arts and entertainment services (codes 90, 90g, 90n); libraries, archives, museums and other cultural services (codes 91, 91g, 91n) and sports services and amusement and recreation services (codes 93, 93g, 93n).

Type of outdoor event	COE multiplier (employment)	GVA multiplier (effect)	Multipliers Input-Output tables	GVA lower 95% bounds	GVA upper 95% bounds
Music	0.426	0.743	90, 90g, 90n	0.724	0.763
Arts & Culture	0.529	0.802	90, 90g, 90n, 91, 91g	0.781	0.823
Fairs & Shows	0.426	0.743	90, 90g, 90n	0.724	0.763
Recreation	0.486	0.758	93, 93g, 93n	0.738	0.777
Corporate	0.486	0.758	93, 93g, 93n	0.738	0.777

Table 7.3 COE and GVA multipliers used in the calculations

Employment is more than just the number of paid positions that the sector supports. Events and outdoor events particularly support an eco-system of freelance, part-time and volunteer opportunities. Whilst some of this is related to the growth of the gig economy, volunteering is an integral part of how these are provided

Table 7.3 lists the COE and GVA multipliers for the service sectors which were used to calculate averages for the multipliers in Table 7.2 and were also used for the multiplier calculations illustrated in Figure 7.1.

	COE multiplier	GVA multiplier
Wholesale trade services, except of motor vehicles and motorcycles	0.523	0.811
Retail trade services, except of motor vehicles and motorcycles	0.515	0.876
Rail transport services	0.627	0.860
Land transport services and transport services via pipelines, excluding rail transport	0.496	0.821
Water transport services	0.499	0.788
Air transport services	0.351	0.690
Warehousing and support services for transportation	0.600	0.862
Postal and courier services	0.555	0.794
Accommodation services	0.474	0.775
Food and beverage serving services	0.510	0.792
Publishing services	0.541	0.866
Motion Picture, Video & TV Programme Production, Sound Recording & Music Publishing Activities & Programming and Broadcasting Activities	0.414	0.857
Telecommunications services	0.402	0.759
Computer programming, consultancy and related services	0.565	0.855
Information services	0.530	0.862
Financial services, except insurance and pension funding	0.470	0.811
Insurance, reinsurance and pension funding services, except compulsory social security	0.358	0.773
Services auxiliary to financial services and insurance services	0.630	0.869
Real estate services, excluding on a fee or contract basis and imputed rent	0.265	0.907
Owner-Occupiers' Housing Services	0.061	0.958
Real estate services on a fee or contract basis	0.519	0.939
Legal services	0.414	0.937
Accounting, bookkeeping and auditing services; tax consulting services	0.525	0.936
Services of head offices; management consulting services	0.550	0.866
Architectural and engineering services; technical testing and analysis services	0.576	0.881
Scientific research and development services	0.512	0.822
Advertising and market research services	0.498	0.880
Other professional, scientific and technical services	0.523	0.845
Veterinary services	0.581	0.931
Rental and leasing services	0.484	0.880
Employment services	0.546	0.879
Travel agency, tour operator and other reservation services and related services	0.553	0.922
Security and investigation services	0.488	0.860
Services to buildings and landscape	0.510	0.866
Office administrative, office support and other business support services	0.501	0.791
Public administration and defence services; compulsory social security services	0.648	0.822
Education services	0.774	0.940
Human health services	0.308	0.948
Residential Care & Social Work Activities	0.529	0.819
Creative, arts and entertainment services	0.304	0.844
Libraries, archives, museums and other cultural services	0.474	0.890
Gambling and betting services	0.330	0.814
Sports services and amusement and recreation services	0.406	0.810
Services furnished by membership organisations	0.554	0.943
Repair services of computers and personal and household goods	0.604	0.843
Other personal services	0.289	0.878
Services of households as employers of domestic personnel	0.995	1.000
Waste collection, treatment and disposal services; materials recovery services non-market	0.417	0.630

Table 7.4: ONS COE and GVA multipliers