



Stockton Borough Council

Stockton International Riverside Festival Evaluation

Draft Report V3

September 2019



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Executive summary

Introduction and methodology

- In 2019, Bluegrass Research was commissioned to undertake research evaluating the Stockton International Riverside Festival (SIRF) for the fifth consecutive year.
- As in previous years, the **main objectives** of the evaluation were:
 - to develop an **audience profile** and provide Stockton Borough Council with an understanding of the audience at SIRF 2019
 - to measure visitor **expectations** and **perceptions** of SIRF 2019, and **satisfaction** with aspects of the experience
 - to consider the **Direct Economic Impact** of SIRF 2019 on Stockton following *eventIMPACTS* principles and methodology
- The research involved **face-to-face interviews** conducted 'on-street' at the Festival with a sample of the audience at various core points and across different times between Thursday 1st August and Sunday 4th August. These on-street shifts generated an **overall sample of 392**.
- An online version of the survey was created by Bluegrass and promoted by Stockton Borough Council, launching on Wednesday 7th August, which attracted a further 25 responses, giving a **final total sample size of 417**.
- This report presents the findings from this research, comparing results with 2018 where relevant.

Key findings

Visitor Profile

Origin

- Over two thirds of visitors to SIRF 2019 were from Stockton Borough; one in seven were from Elsewhere in Tees Valley; around one in ten originated from elsewhere in the North East; and one in fourteen were visiting from other areas of the UK.
- As shown in the table below, the origin of visitors to SIRF 2019 was broadly in line with 2018 findings:

<i>Location</i>	2019 Base: 417	2018 Base: 520
<i>Stockton</i>	67%	71%
<i>Elsewhere in Tees Valley</i>	14%	12%
<i>Elsewhere in the North East</i>	11%	8%
<i>Other areas of the UK</i>	7%	8%
<i>Overseas</i>	<0.5%	1%



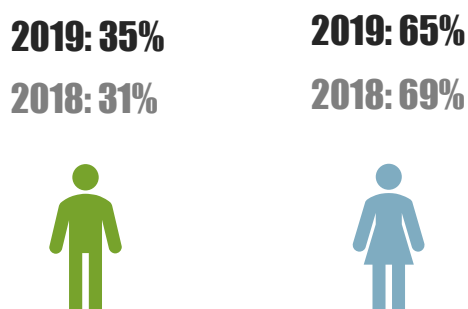
Age

- All age categories were represented at SIRF 2019, with those aged 30-69 accounting for almost four in five [78%] of the audience.
- The proportion of the audience aged 50-69 has significantly increased from around three in ten [31%] in 2018 to almost two in five [38%] in 2019:

<i>Age</i>	2019 Base: 417	2018 Base: 520
16 - 29	15%	20%
30 - 49	40%	44%
50 - 69	38%	31%
70+	6%	5%

Gender

- Gender profiles were similar to 2018 findings and still weighted towards females:



Group composition

- The majority [85%] of the sample were attending the Festival with other people and just over half [52%] had a child or children with them.
- In 2019, there was a decrease in the proportion who attended in large groups of 5 or more people and an increase in group sizes of 4:

<i>Group size</i>	2019 Base: 417	2018 Base: 520
1	15%	17%
2	18%	15%
3	22%	20%
4 to 5	30%	26%
6 to 10	13%	17%
11+	2%	6%



Other Audience Profiles

- The vast majority [96%] of the audience at SIRF 2019 was White British [2018: 94%].
- Over two thirds [68%] were in work or education [2018: 69%].

Audience composition

- As previously established, most of the SIRF 2019 audience were from Stockton, defined as Residents [67%], with the remainder from outside Stockton Borough defined as Non-Residents [33%]. In 2018, 71% of the sample were Residents and 29% Non-Residents.
- The majority [92%] of the audience were on a day rather than an overnight trip [2018: 90%].
- The table below compares the audience breakdown across the total sample for 2019 and 2018:

<i>Visitor Type</i>	2019 Base: 417	2018 Base: 520
<i>Resident Day Trip</i>	67%	70%
<i>Resident Overnight Trip</i>	0%	1%
<i>Non-Resident Day Trip</i>	25%	20%
<i>Non-Resident Overnight Trip</i>	8%	10%

Awareness of and Engagement with SIRF 2019

Attending the Festival

- 100% of the sample were aware that the event they were attending was part of SIRF 2019 [2018: 99%].
- Most [83%] had visited in previous years, although this does still represent a decrease in repeat visitors from 2018 [2018: 88%]. Those who said they had attended SIRF previously were then asked when their last visit was: 75% of the returning audience members had attended SIRF last year [2018: 79%].
- Of those who had attended the Festival previously, 44% had attended 1 to 5 previous SIRFs [2018: 33%] and 56% had attended 6+ [2018: 67%].
- The 2019 SIRF audience were less engaged with arts and cultural events than in 2018: around four in five [79%] said they enjoyed events of this type [2018: 94%]:
 - Almost half [49%] had attended arts and culture events in the past 6 months [2018: 51%]



Motivations for visiting

- Attendees' motivations for attending the Festival were similar to last year's, although there was a significant increase in respondents who were visiting SIRF 2019 as a means to entertain their children:

Main Motivations	2019 Base: 416	2018 Base: 520
<i>To spend time with friends and family</i>	38%	34%
<i>To be entertained</i>	25%	25%
<i>To enjoy the atmosphere</i>	10%	13%
<i>To entertain my children</i>	9%	3%

Channels of communication

- The most influential channel of communication was word of mouth, which saw a significant increase in 2019 compared to last year. Several other channels, including Stockton News, SIRF website, outdoor banners and the Stockton Borough Council website saw a decrease:

Communications	2019 Base: 401	2018 Base: 520
<i>Word of mouth</i>	40%	31%
<i>Previous visit</i>	30%	Code not included
<i>Stockton News</i>	9%	14%
<i>SIRF Facebook</i>	8%	26%
<i>Leaflet through the door</i>	7%	6%
<i>Local newspaper</i>	6%	12%
<i>SIRF Website</i>	5%	9%
<i>Outdoor banners</i>	5%	10%
<i>Stockton Borough Council Website</i>	4%	9%
<i>Other</i>	7%	23%



Perceptions of SIRF 2019

- Respondents were asked to rate various aspects of their experience of SIRF 2019 and were generally very positive. In 2019, they were more likely [96%] to rate the overall experience positively compared to last year [2018: 93%]. This represents the highest positive rating for the overall experience at the Festival for the last four years [2016: 92%; 2017: 87%].
- Specific aspects of the Festival attracted the following ratings, with several elements receiving more positive feedback this year versus 2018 findings:
 - *Ease of physical access around the Festival:* 97% positive [2018: 89%]
 - *Quality of the event:* 94% positive [2018: 90%]
 - *Signage to the events:* 85% positive [2018: 76%]
 - *Publicity for the event:* 84% positive [2018: 80%]
- Respondents were also very positive in their wider perceptions of the Festival:
 - In a significant increase from last year, 94% agree that the *Festival is a good use of council resources* [2018: 89%]
 - 94% said that they are *likely to return to SIRF 2020* [2018: 94%]
 - 96% said they were *likely to recommend* [2018: 93%]
 - 93% agreed that *SIRF is good for promoting Stockton as a place to live, work or visit* [2018: 92%]

Expenditure

- This report considers level of expenditure at SIRF 2019, using data generated from the research. This expenditure data shows the average per person expenditure by both Residents and Non-Residents across the range of expenditure categories. *Note: Not all of this can be considered as additional to the local economy and does not therefore constitute Direct Economic Impact attributable to the event.*
- The overall average rate of expenditure at SIRF 2019 was £22.65 per person. This year, Residents spent on average £16.06 at the event, compared to Non-Residents who spent £35.96.

Note: We asked how much those attending had spent on travel both within Stockton and the wider region for reference. Although spend outside of Stockton cannot be included in calculations of Direct Economic Impact on Stockton itself, as an indication, inclusion of expenditure on travel outside of Stockton increases the overall spend per person to £24.16.



Calculating Direct Economic Impact

- Following the principles of 'EventImpacts', a recognised methodology for calculating economic impact of events, Bluegrass has calculated the Direct Economic Impact attributable to SIRF 2019
- Core to this methodology is the importance of distinguishing between 'qualifying' and 'non-qualifying' expenditure, on the basis that not all expenditure by the audience can be included in the Direct Economic Impact calculation, as some of it:
 - *would have occurred anyway and/or*
 - *is not attributable to SIRF 2019*
- Considering only 'qualifying' Residents and Non-Residents, the overall average rate of expenditure at SIRF 2019 was £31.12 per person, up from £24.98 in 2018.
 - Qualifying Residents: £22.45 in 2019, up from £17.26 in 2018.
 - Qualifying Non-Residents: £36.02 in 2019, up from £32.00 in 2018.
- The average spend per person on each category, still considering only 'qualifying' respondents, is shown below, and highlights that, as in 2018, *eating and drinking* represents the highest spending category

	2019	
Eating and drinking	£	11.80
Shopping	£	5.86
Entertainment	£	0.96
Travel and Transport	£	1.18
Accommodation	£	8.82
Other	£	2.49

- Stockton Borough Council provided an estimated **crowd size of 59,500** for SIRF 2019. Based on this, and the proportions of audience types and their average spend and including an estimate of expenditure by Stockton Borough Council on hospitality, **Direct Economic Impact has been estimated at £954,552.**

A note from Stockton Borough Council on estimating audience numbers

Stockton Council has attempted to strengthen its method for calculating audience sizes and visitor numbers at its major events by introducing an estimated audience size for each separate event location or site and for each day or part day session. Where locations allow, these estimates are correlated with footfall counter data, which measures numbers of people in a given space, rather than audiences for an event in that space. This produces a total audience estimate which is expressed as a range to allow a margin of error. In 2019 the estimated range was 57,000 to 62,000. Bluegrass have taken a mid-point from the range to calculate the economic impact.



Introduction

Objectives of the evaluation

The primary aim of this research was to provide Stockton Borough Council with a comprehensive evaluation of Stockton International Riverside Festival 2019. The main objectives were as follows:

- to provide organisers with an understanding of the audience at SIRF 2019
- to measure satisfaction with the visitor experience and wider perceptions of the Festival
- and to calculate the Direct Economic Impact of SIRF 2019 on Stockton Borough

Specifically, the research with the Festival audience sought to provide the organisers with information on:

- Profile of Visitors
- Awareness of and relationship with SIRF
- Nature of trip
- Satisfaction with and perceptions of SIRF 2019
- Audience composition
- Expenditure
- Direct economic impact

Methodology

The research involved face-to-face interviews conducted on-street with members of the audience, randomly sampled, across different times and events during the Festival. Interview shifts were scheduled to coincide with key events in the programme, and were conducted at High Street, Riverside, Church Road, Trinity Green and Parish Gardens across the 4 days of the Festival, achieving a total of 392 interviews.

In line with 2018, the interview lasted an average of approximately 8 minutes. The questionnaire is included in Appendix 1.

Additionally, an online survey was created by Bluegrass and promoted by the team at Stockton Borough Council. This online survey remained live for a week from Wednesday 7th August and generated a total of 25 responses.

An **overall combined sample of 417** was therefore achieved.



Reporting statistics

Significance testing

Statistical testing has been undertaken to a 95% confidence level, to identify differences in results between 2019 and 2018. The statistical formula used to assess whether statistical differences exist takes into consideration the “margin of error”: a statistically derived +/- figure. The margin of error states that if the survey was repeated 100 times, the result would lie within this range at least 95 times out of the 100.

Where there is a statistically significant change between 2019 and 2018, significantly higher findings are highlighted in **red**, significantly lower findings are highlighted in **blue**

Rounding

All calculations are made in full statistical tables using actual figures, while the tables and charts in this report show the rounded figures. All data is rounded to the nearest whole percentage point, which can result in apparent differences when values are summed.



Research findings

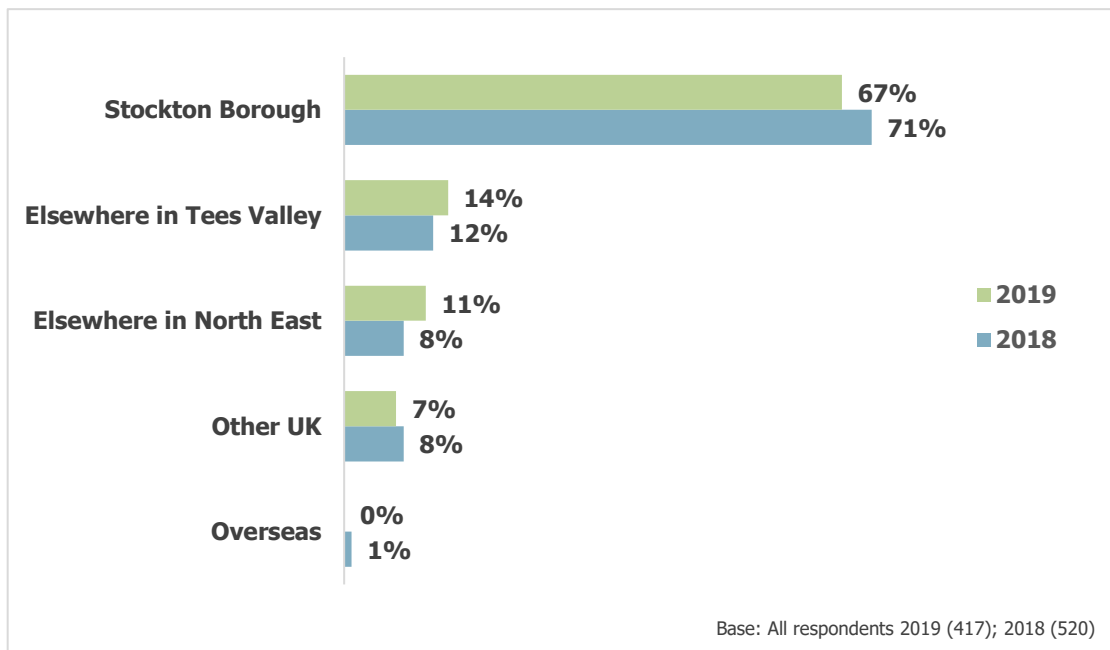
Visitor Profile

Profiling data collected as part of the survey provides a breakdown of respondents' *origin, gender, age, employment status, ethnicity, disability status* and *group composition*, summarised in this section of the report.

Origin

The figure below demonstrates that the majority [92%] of SIRF 2019 attenders permanently reside within the North East region; over two thirds [67%] were from Stockton Borough itself.

Figure 1: Where is your permanent place of residence?

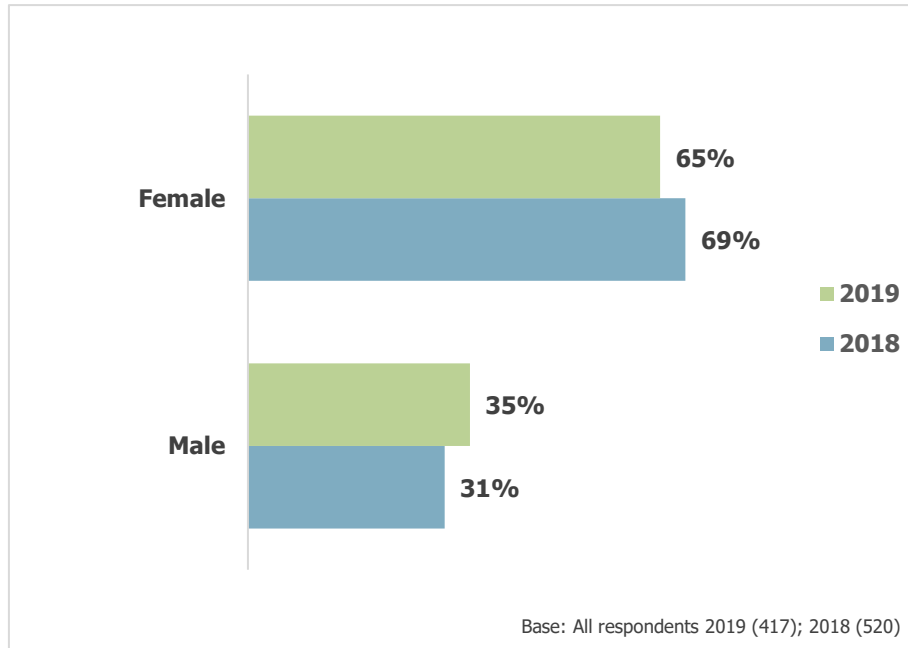


Gender

As in previous years, the gender profile is weighted towards women with approaching two thirds [65%] of the sample being female. In 2018, 69% were female and 31% male.



Figure 2: Gender

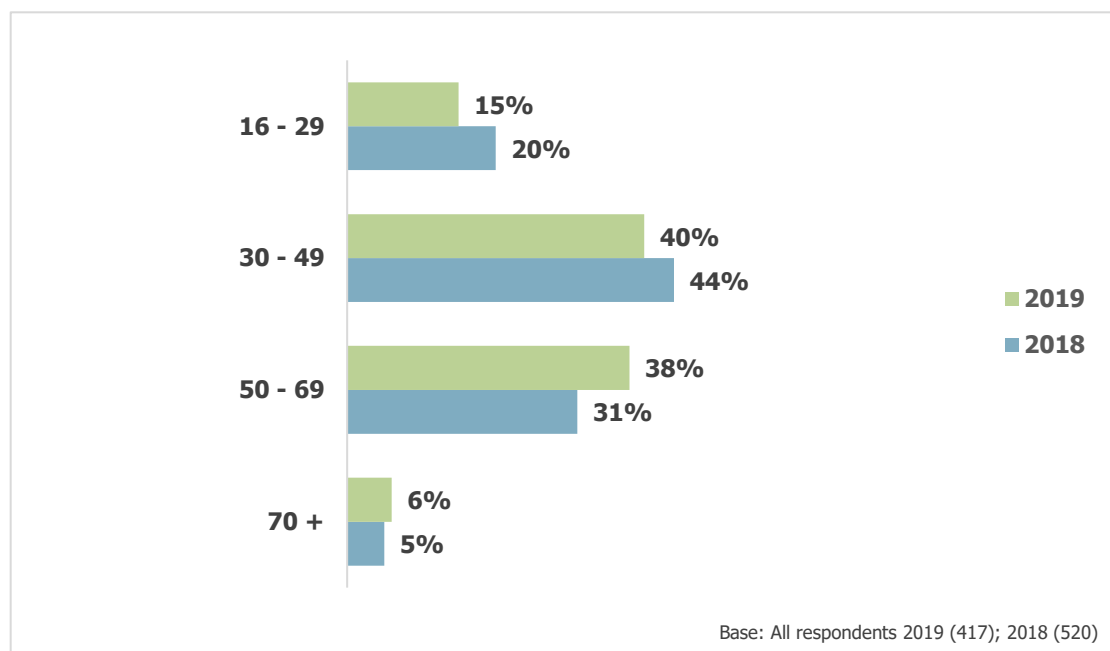


Age

The age distribution in 2019 was similar to last year. Those aged 30-49 and 50-69 were the most represented at the Festival, accounting for over three quarters [78%] of the sample in total. The younger and older age groups were also represented, although in much lower proportions: 15% were aged 16-29; 6% were aged were aged 70+.

The spread across the age categories is illustrated in Figure 3 below.

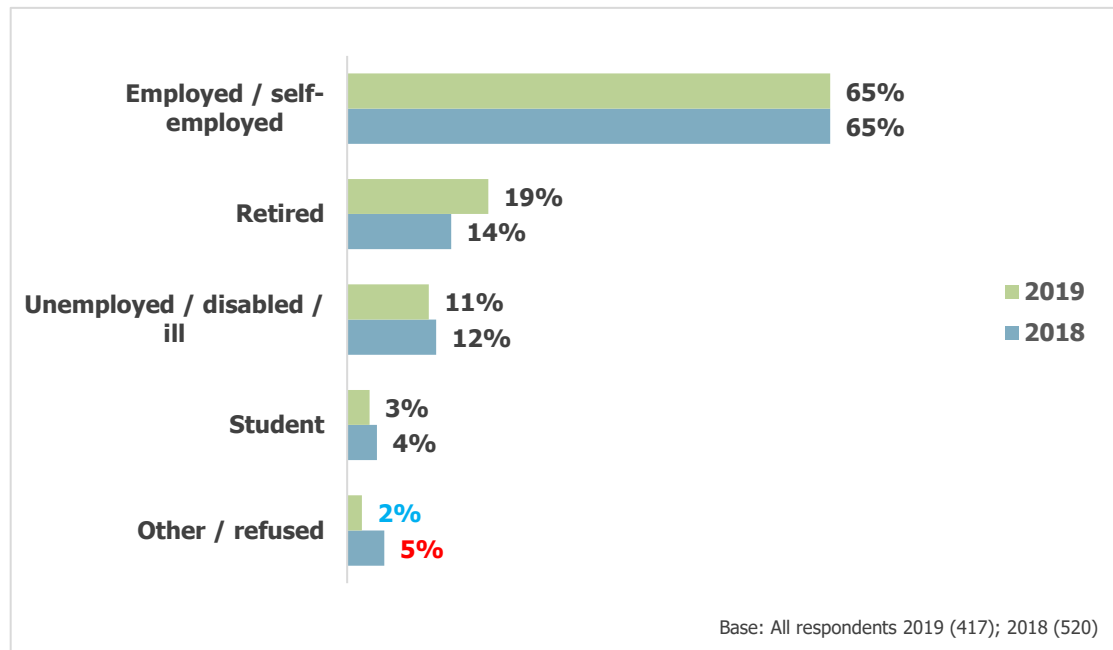
Figure 3: Age



Employment status

In line with 2018, the majority of respondents, two thirds overall, were employed and a further 3% were in education. A minority [11%] of visitors were unemployed (either seeking work or due to a disability) and approaching one in five [19%] was retired. The profile of working status in 2019 was broadly similar to last year, though there was a decrease in the proportion who answered 'other' or refused to comment.

Figure 4: Working status

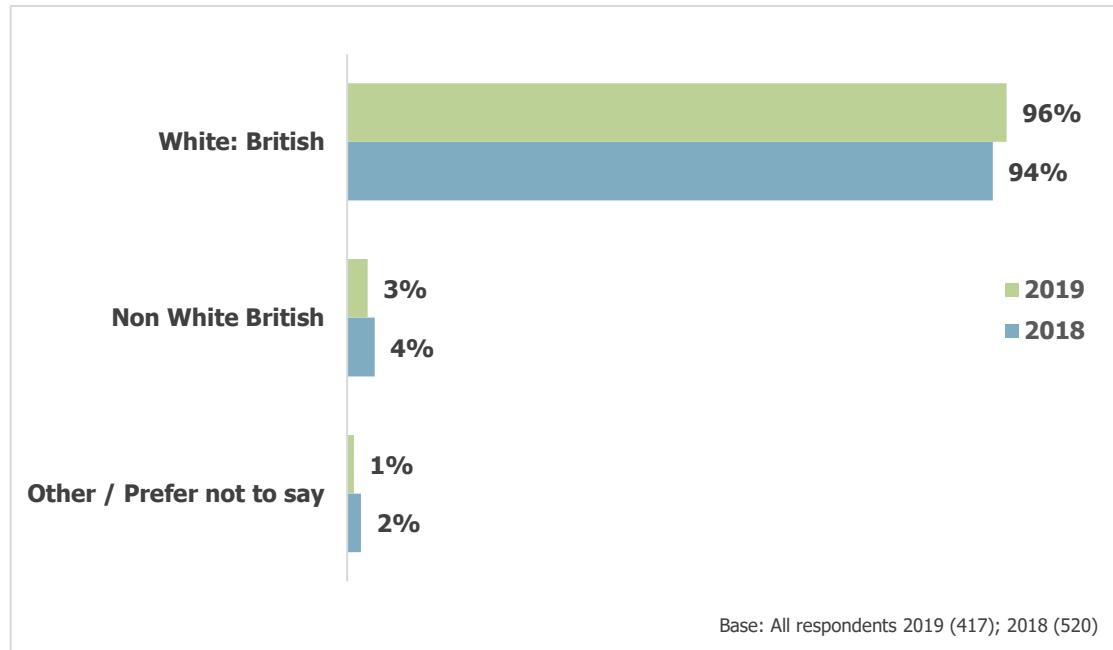


Ethnicity

Broadly in line with last year, the vast majority of the sample [96%] reported that they considered themselves to be White British.



Figure 5: Ethnicity



Disability

This question was changed slightly in this year's survey, to reflect the Audience Agency's core questionnaire wording.

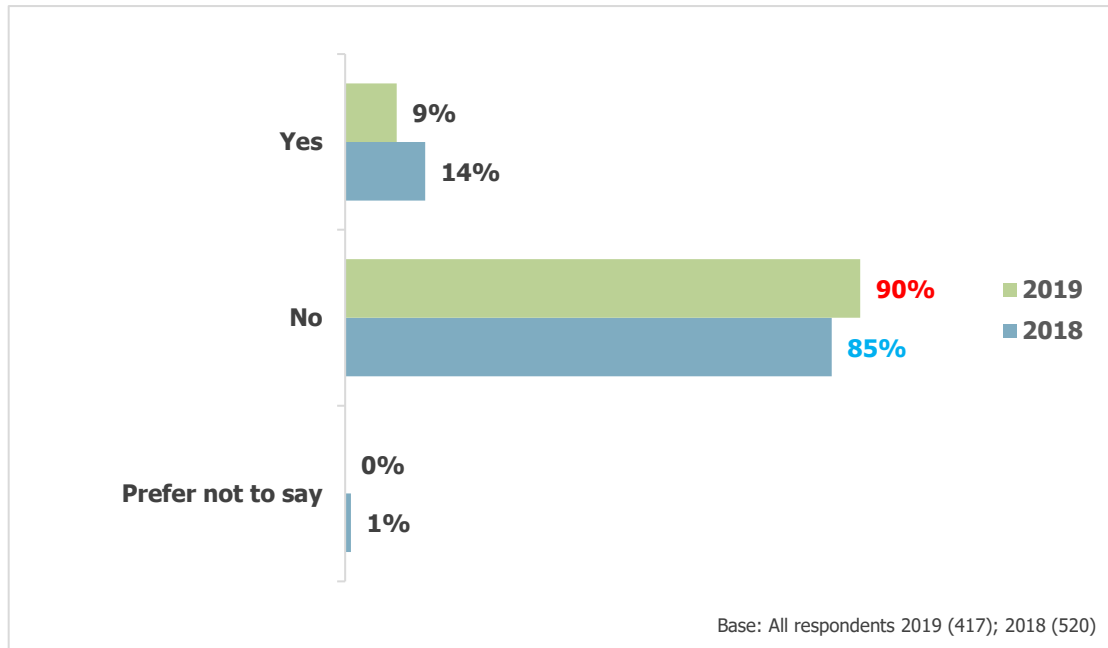
Respondents in 2019 were asked if they, or any member of their party, identified as being deaf or disabled or had a long-term health condition. Last year's respondents were asked whether their own activities, or those of any member of their party, were limited because of a long-term disability, with the option to choose whether their disability limited their activities a little or a lot.

For comparative purposes here, those who answered in 2018 that they had a disability which limited their activities 'a little' or 'a lot' have been combined into a 'yes' option.

As illustrated in Figures 6 and 7, there are some changes in 2019, however it should be borne in mind that year-on-year changes may be driven by the difference in wording.

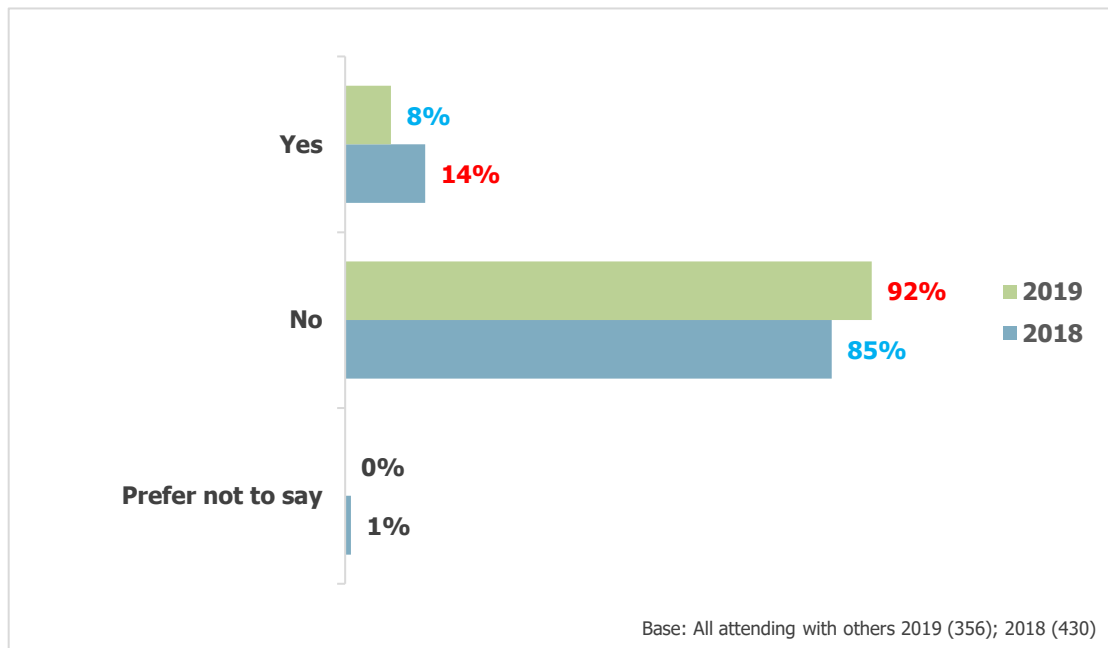


Figure 6: Do you identify as a deaf or disabled person, or have a long-term health condition?



One in twelve [8%] of respondents reported someone in their party having a disability or long-term health condition, a marked decrease compared to one in seven [14%] last year.

Figure 7: Does anyone in your party today identify as deaf or disabled person, or have a long-term health condition?



Group composition

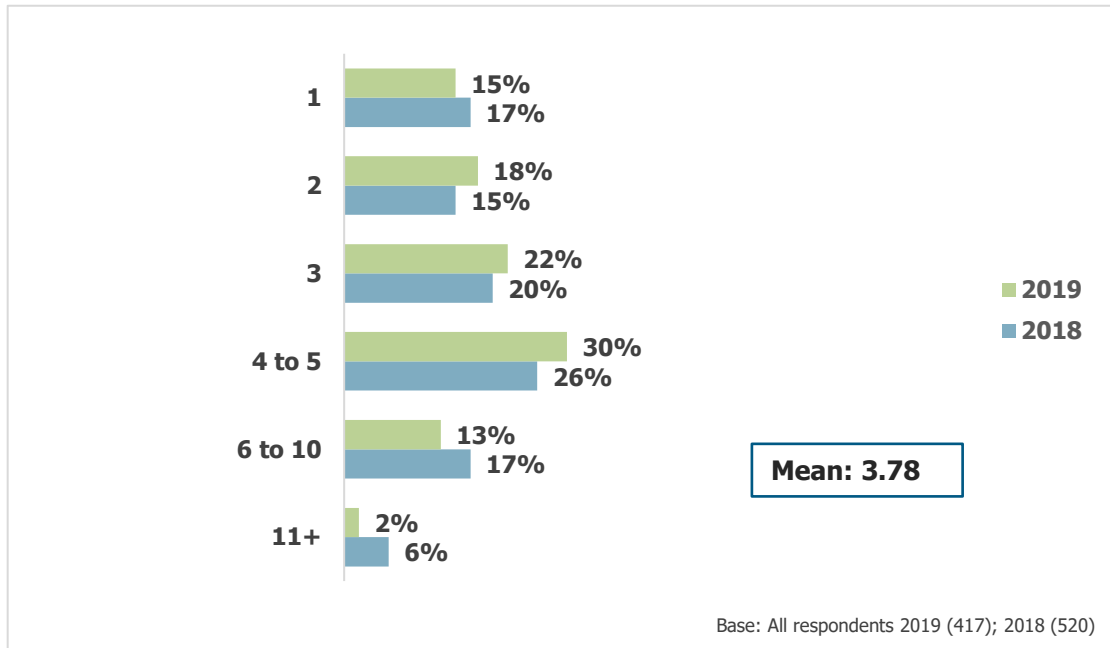
The mean group size in 2019 was **3.78**, compared to **4.55** in 2018.

The majority [85%] of respondents were attending SIRF 2019 with someone [2018: 83%]. As in 2018, the most common group sizes this year were 4 to 5 [30%] and 3 [22%]: together



representing over half [52%] of the sample. As shown in Figure 8, there were no significant changes observed in group sizes compared to last year.

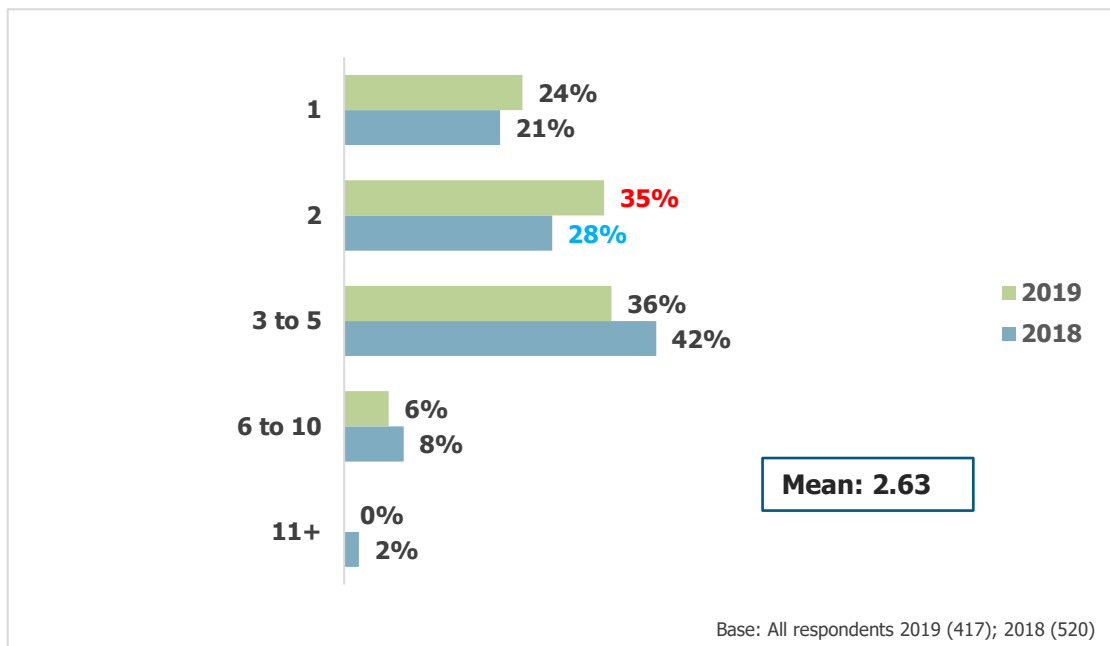
Figure 8: Total group size



Adults

As illustrated in Figure 9, there was an increase this year in the proportion of groups which had 2 adults: over a third [35%] of groups this year had 2 adults compared to under one in five [28%] last year.

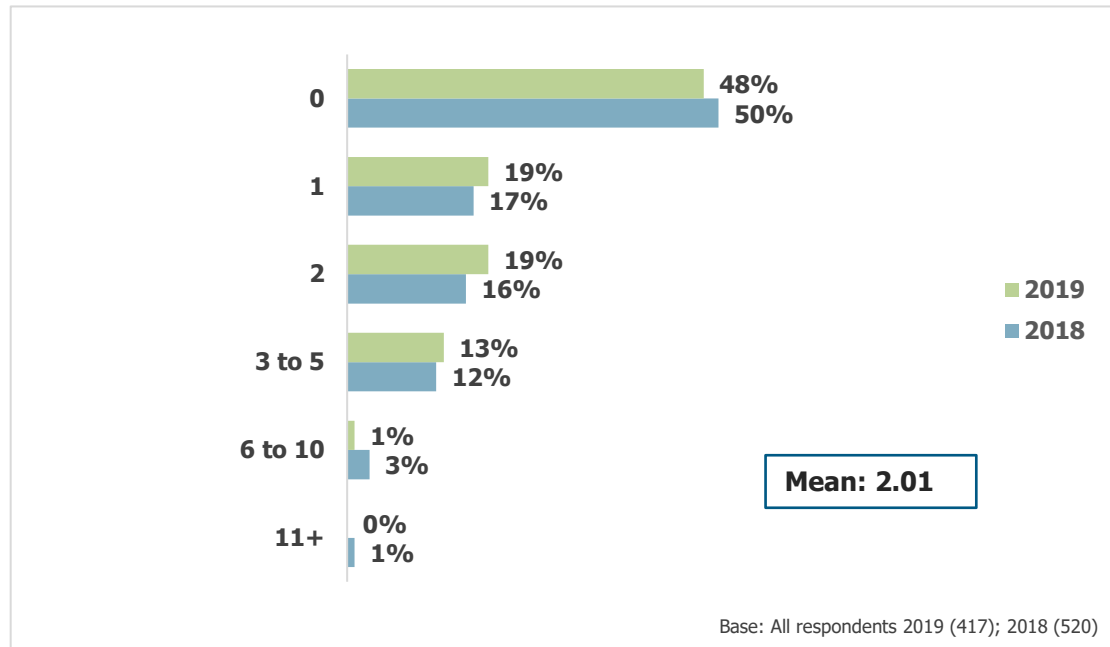
Figure 9: Total adults (16 or over) in group



Children

Just over half [52%] of the sample were at the Festival with children – this is in line with last year’s findings. Figure 10 below shows the distribution of number of children accompanying respondents.

Figure 10: Total children in group



Breakdown of ages for children

In 2019, one in five [20%] of attendees had at least one child aged under 3 with them, two in five [40%] had at least one 3 to 12 year old and over one in ten [11%] had a 13 to 15 year old in their party.

The figure below shows the breakdown of number of children present in responding groups in the following age brackets: under 3, 3 to 12 and 13 to 15.

Approaching one in five [18%] of visitors had 1 child under 3 with them, one in twenty [5%] had 2 children aged under 3 with them and only 1% had between 3 and 5 children under 3 in their party.

Around a quarter [24%] of visitors had 1 child aged 3 to 12 in their party, just over one in seven [15%] had 2 children in this age group and one in twelve [8%] had between 3 and 5 children of this age group.

One in ten [10%] had 1 child aged 13 to 15 in their group, 2% had 2 children of this age bracket and only 1% had between 3 and 5 children aged 13 to 15.

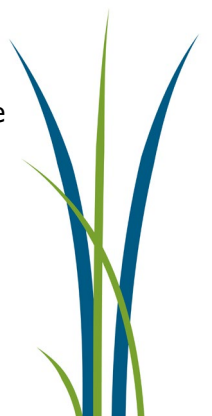
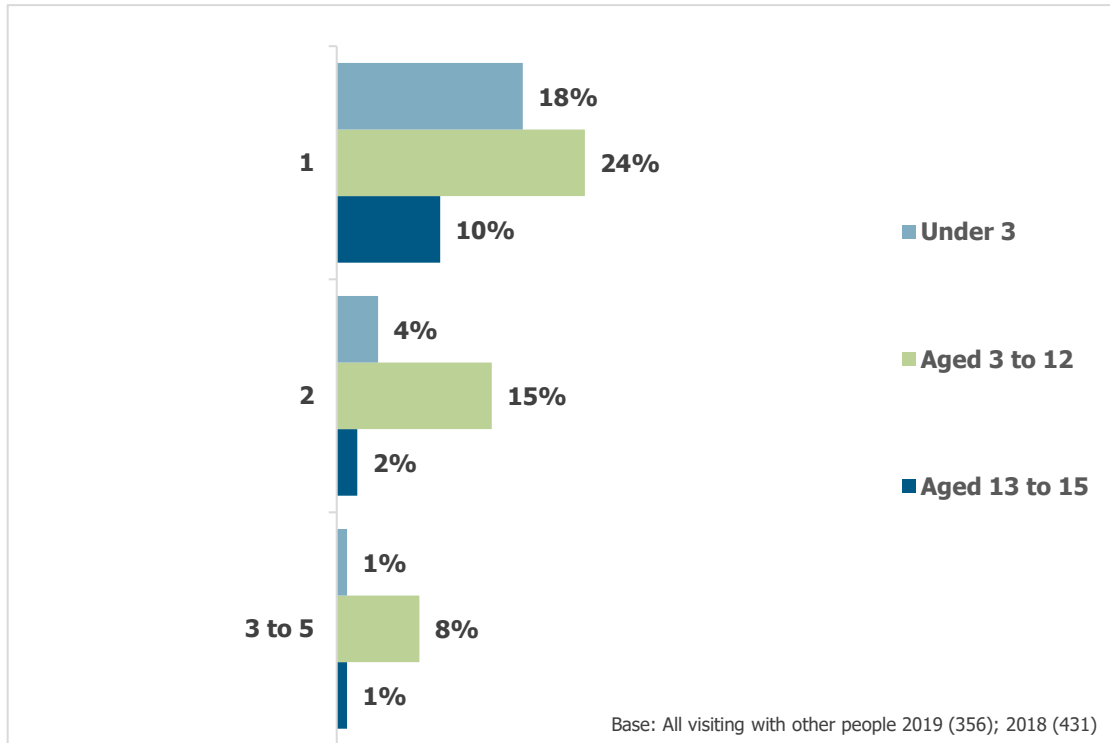


Figure 11: Total children aged under 3, 3-12 and 13-15 in group



Relationship with SIRD

This section's findings consider levels of awareness of SIRD; exposure to communications activity; history of visiting previous Festivals; and motivations for visiting SIRD.

Awareness of the Festival

Respondents were initially asked if they were aware of SIRD and whether this was their main motivation for coming to Stockton on that day.

All respondents were aware that the event they attended was part of SIRD [2018: 99%].

Communications

As in 2018, the most important channel for hearing about SIRD in 2019 was word of mouth [40%] – significantly more important than last year [31%].

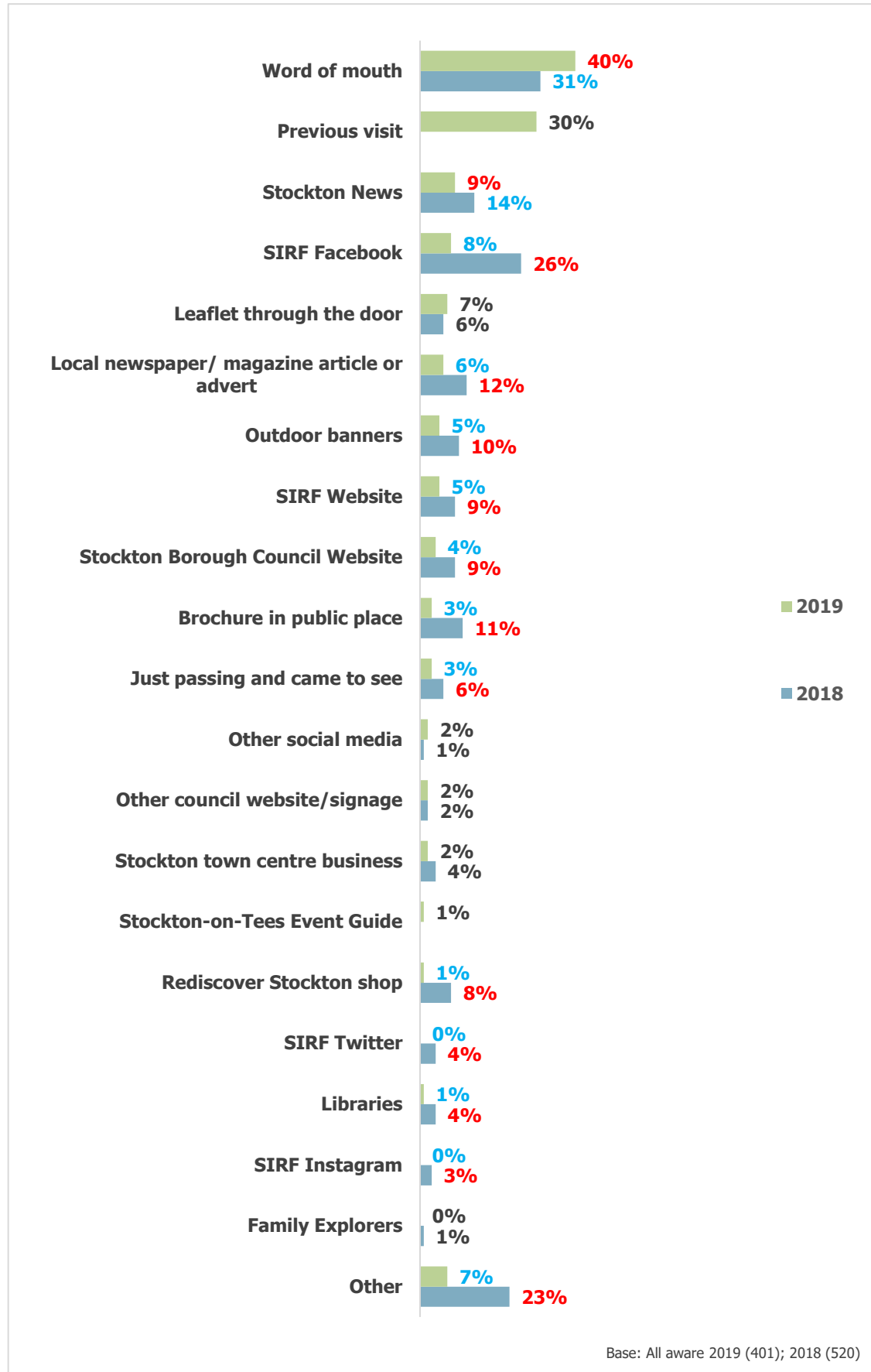
A number of other channels decrease in significance in 2019, most notably SIRD Facebook cited by 8% this year, compared to 26% in 2018.

This year, 'other' responses referring to a 'previous visit' were back-coded into a distinct category; three in ten [30%] said they had been made aware of SIRD through previous knowledge or visit. This accounts for the significant decrease in the proportion of respondents answering 'other' this year compared to 2018.

The channels of communication through which respondents heard about SIRD 2019 are shown in Figure 12 below.



Figure 12: How did you hear about the Festival?

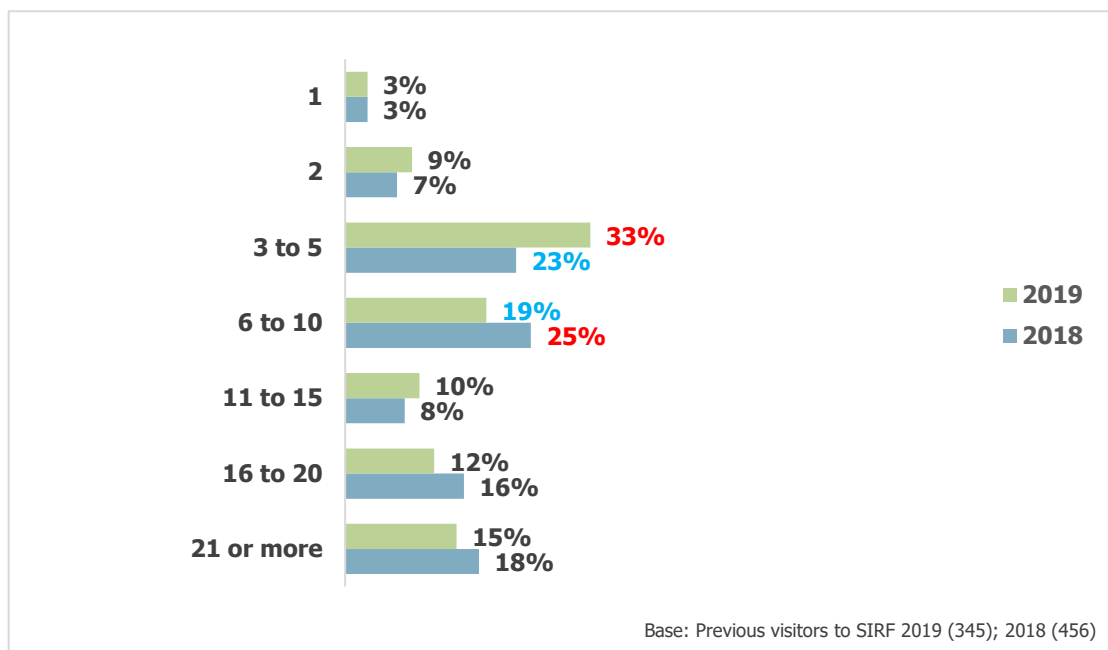


Visits to previous Festivals

Respondents were asked about their history of visiting SIRD in previous years. Although still a large majority [83%], there was a decrease compared to last year [88%] of visitors who stated they had visited SIRD before.

Of those who had visited SIRD before, the majority had typically been to several previous SIRDs – over half had been to between 3 and 10 previous SIRDs, whilst over one in seven [15%] had been to 21 or more! In 2019, there was an increase in the proportion of visitors who had attended 3 to 5 previous SIRDs, from under a quarter [23%] to a third [33%], and a decrease in those that had attended 6 to 10 previous SIRDs, from a quarter [25%] to approaching one in five [19%].

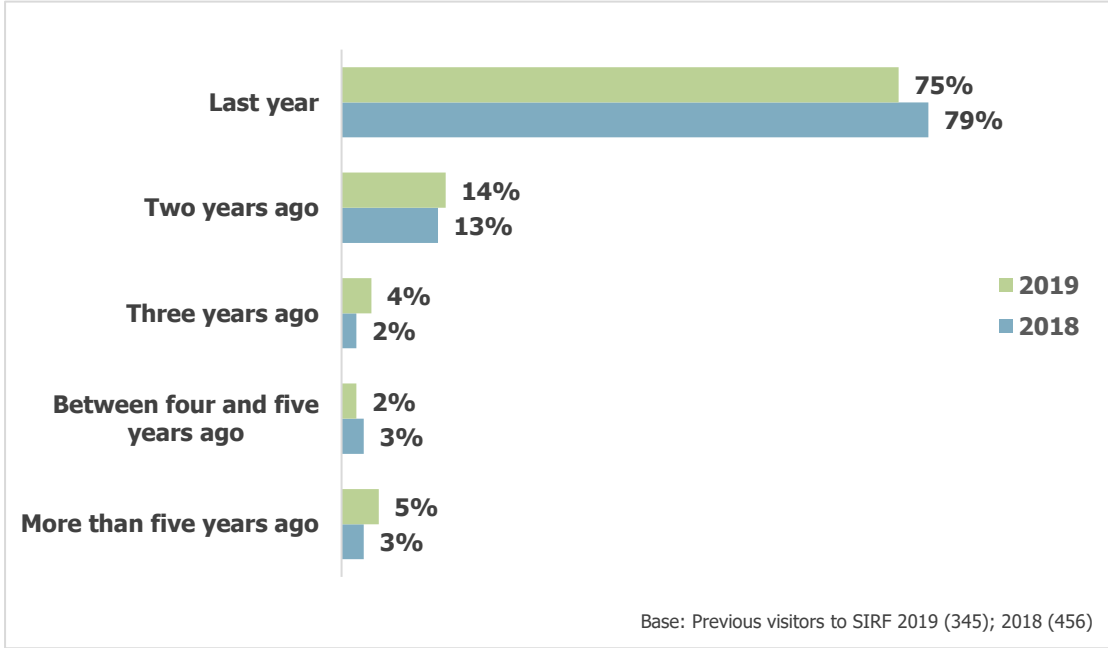
Figure 13: How many SIRD Festivals have you visited before?



Broadly in line with last year, three quarters of previous visitors to SIRD [75%] reported that they had visited SIRD 2018 last year, illustrated by Figure 13 below [2018: 79%].



Figure 14: When was your last visit before this year?

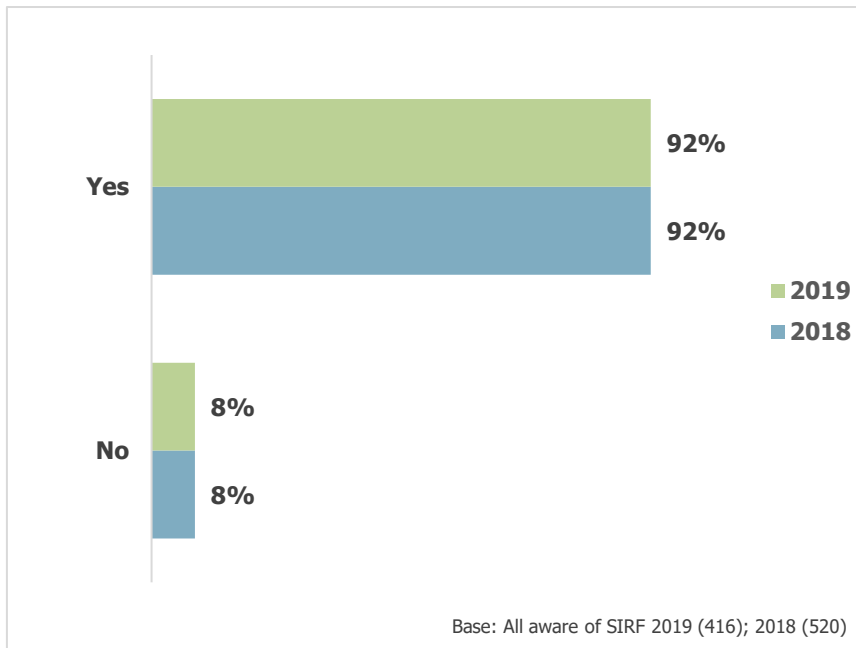


Main reason for visit

In order to consider the Direct Economic Impact of the Festival, it is important to understand the proportions of the audience for whom the Festival was the main reason for their visit to Stockton that day and who would otherwise not have been present in the town.

The findings show that a sizeable majority [92%] were in Stockton for the event, the same proportion to last year.

Figure 15: Is / was the Festival / this event the main reason for you being in Stockton?



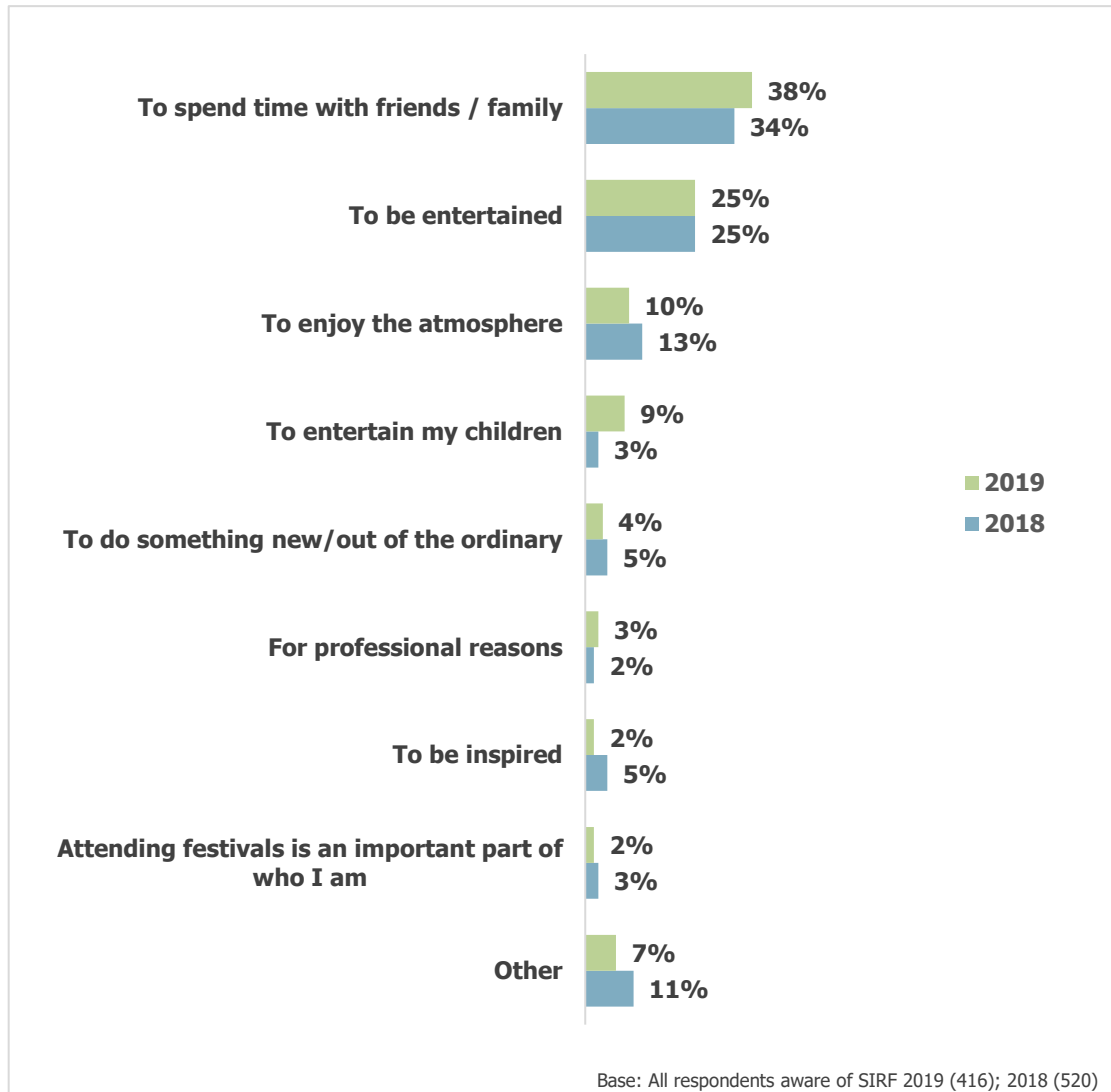
Motivations for visiting SIRF

Those aware of SIRF were asked their motivations for visiting the Festival, illustrated in Figure 16 below.

As in 2018, the main motivation for visiting the Festival was 'to spend time with friends / family', given by around two in five in 2019 [38%], while a quarter [25%], said their main motivation for visiting was 'to be entertained'.

The findings show that although a variety of influences for visiting exist, respondents selected 'to entertain my children' in greater proportions this year, with almost one in ten [9%] saying this compared to only 3% in 2018. This change was driven by those in the sample visiting with children [52%].

Figure 16: Which of the following describe your main motivation for visiting?

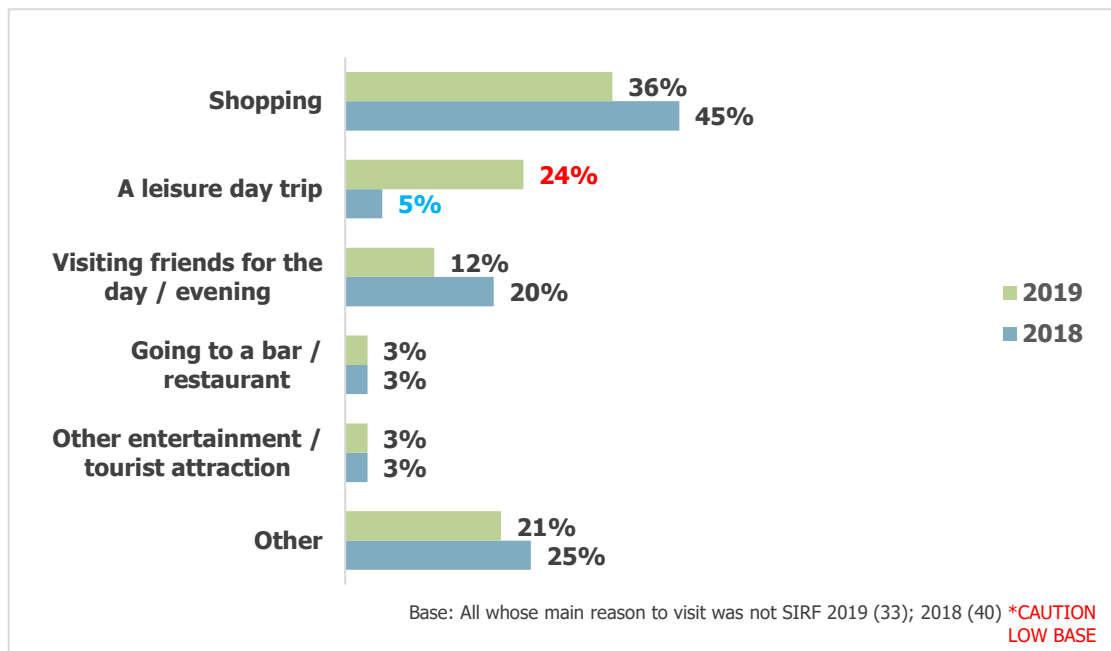


Other reasons for visit

Respondents who stated that SIRF 2019 **was not** their main reason for visiting Stockton that day were asked for what other purpose they had visited. Figure 17 below indicates that shopping was, as last year, the primary other reason for being in Stockton, with a marked rise in those citing 'a leisure day trip' as the reason from only one in twenty [5%] in 2018 to approaching a quarter [24%] in 2019.

However, the data should only be used as a cautious guide as base sizes are low.

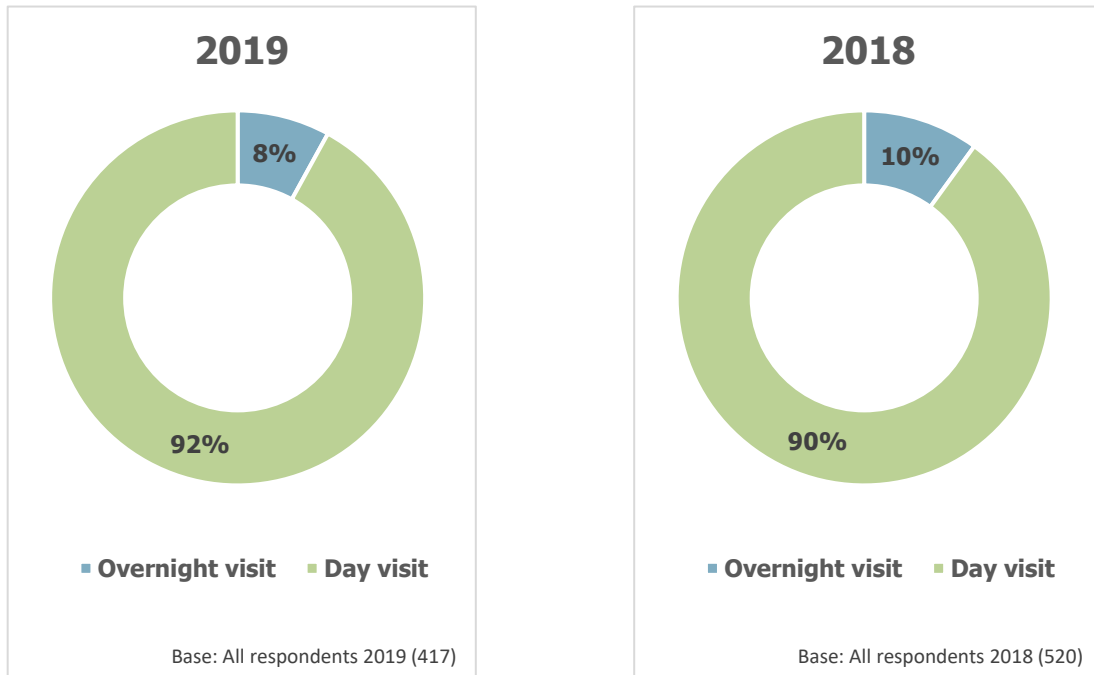
Figure 17: What is / was the main purpose of your visit?



Nature of trip

A number of questions in the interview related to the nature of the visit, to enable estimates to be made of the profile of the audience and specifically the different types of visitor present within it.

Figure 18: Does / did your visit to SIRF include an overnight stay away from home?



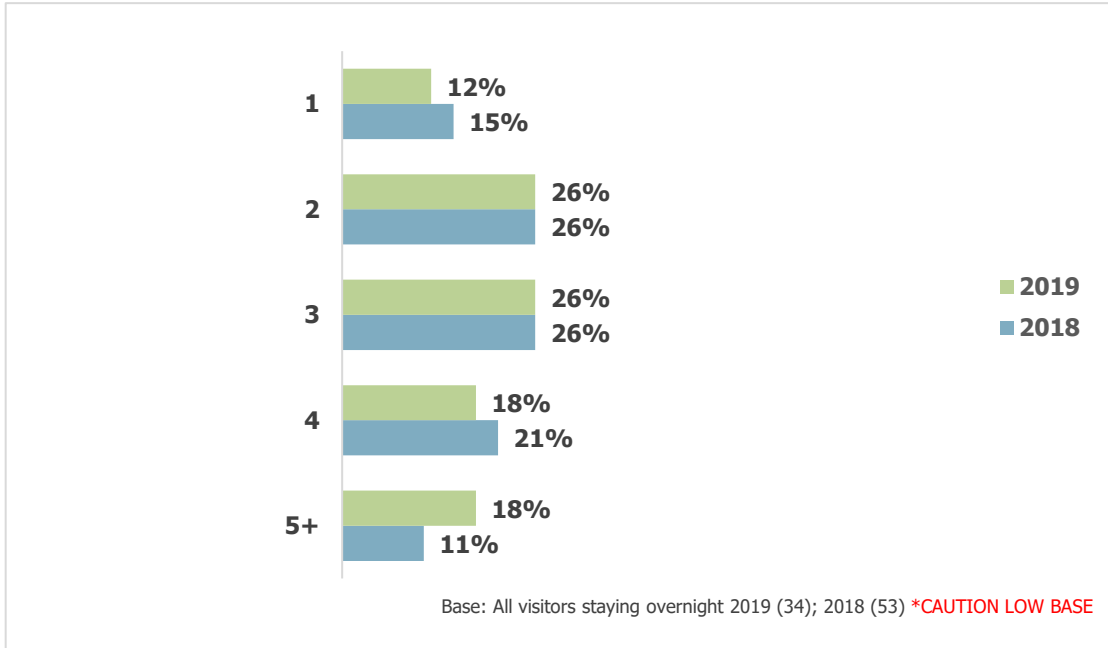
The findings are broadly in line with last year; the majority [92%] of attendees to SIRF 2019 were on 'day' rather than 'overnight' trips. Only a small minority, one in twelve [8%], incorporated an overnight stay away from home in their visit to the Festival, compared to one in ten [10%] last year.

Overnight visitors were further asked how many nights they spent away from home for their trip to the Festival and, as shown in Figure 19 below, overnight visitors were most commonly staying for 2 nights [26%] or 3 nights [26%] – this is unchanged from last year's findings.

However, given the base size of overnight visitors is low (34), these findings relating to those staying overnight should be treated with some caution.

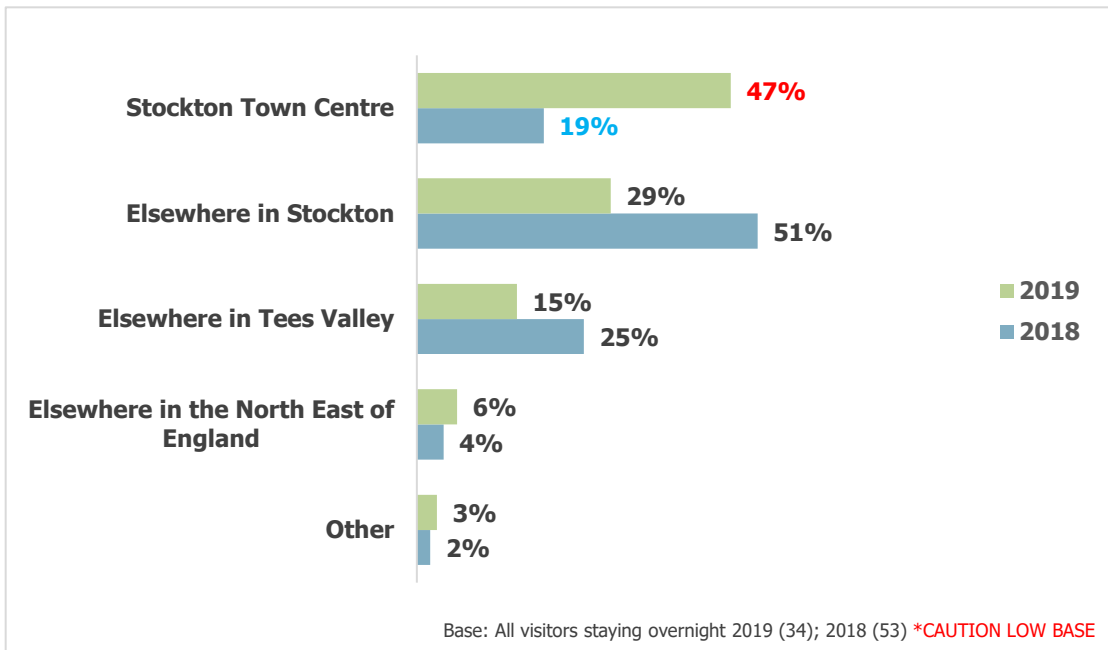


Figure 19: How many nights are you staying / did you stay away from home for SIRF?



The majority, over three quarters [76%], of those staying overnight stayed in Stockton Borough. This year a higher proportion of respondents stayed in Stockton Town Centre: approaching half [47%] compared to around one in five [19%] in 2018.

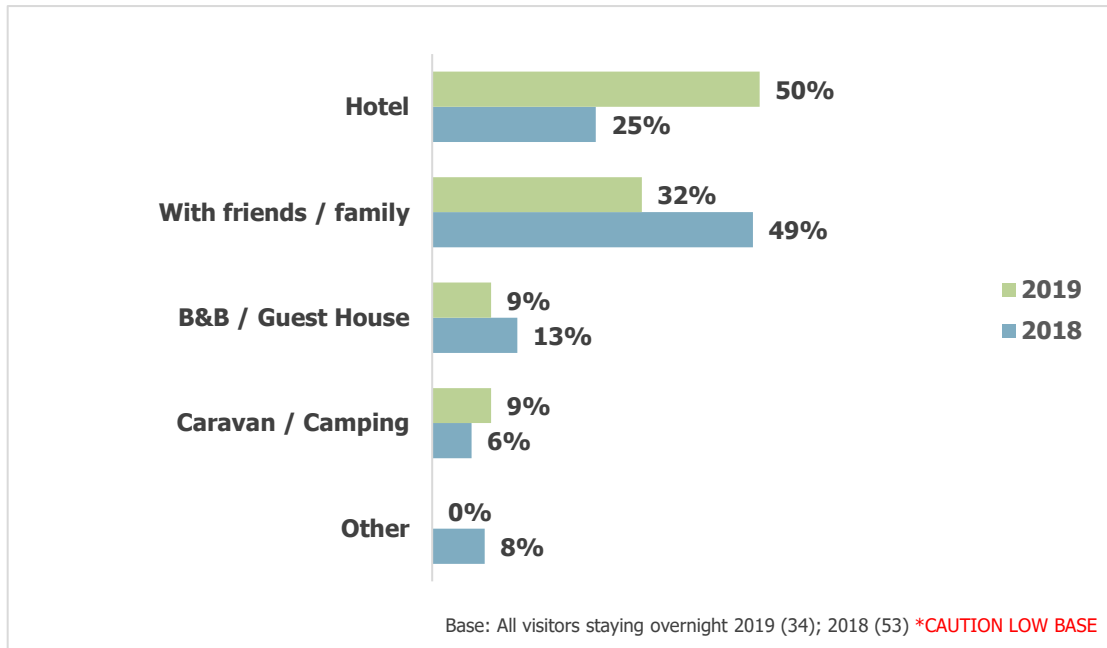
Figure 20: Where are you staying/ did you stay?



In an increase this year, half [50%] of those staying overnight stayed in a hotel. Around a third [32%] stayed with friends and family, compared to almost half [49%] in 2018, and approaching one in ten [9%] were staying in a B&B/ Guest House or a Caravan / Camping.



Figure 21: Which type of accommodation are you staying / did you stay in?



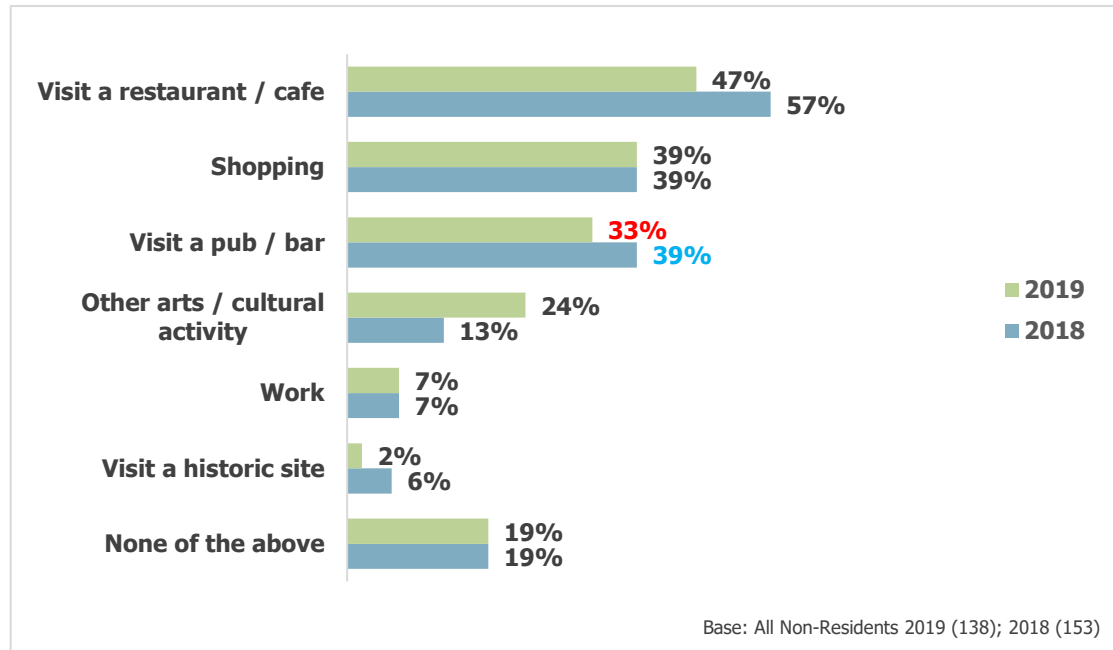
Non-Residents' activities in Stockton

Non-Residents were asked what other activities they had partaken in or intended to partake in during their visit to Stockton. In line with 2018, visiting a restaurant / café was the most popular activity, with almost half of Non-Residents saying they had done or intended to do this. There was a significant rise in those indicating they had or would do a different arts / cultural activity on their visit: around a quarter [24%] of Non-Residents in 2019 said this compared to one in eight [13%] last year. The same proportion as last year, around two in five [39%], said they had or would be shopping.

The full range of activities are laid out below in Figure 22.



Figure 22: Which of these have you done / did you do on this visit to Stockton?

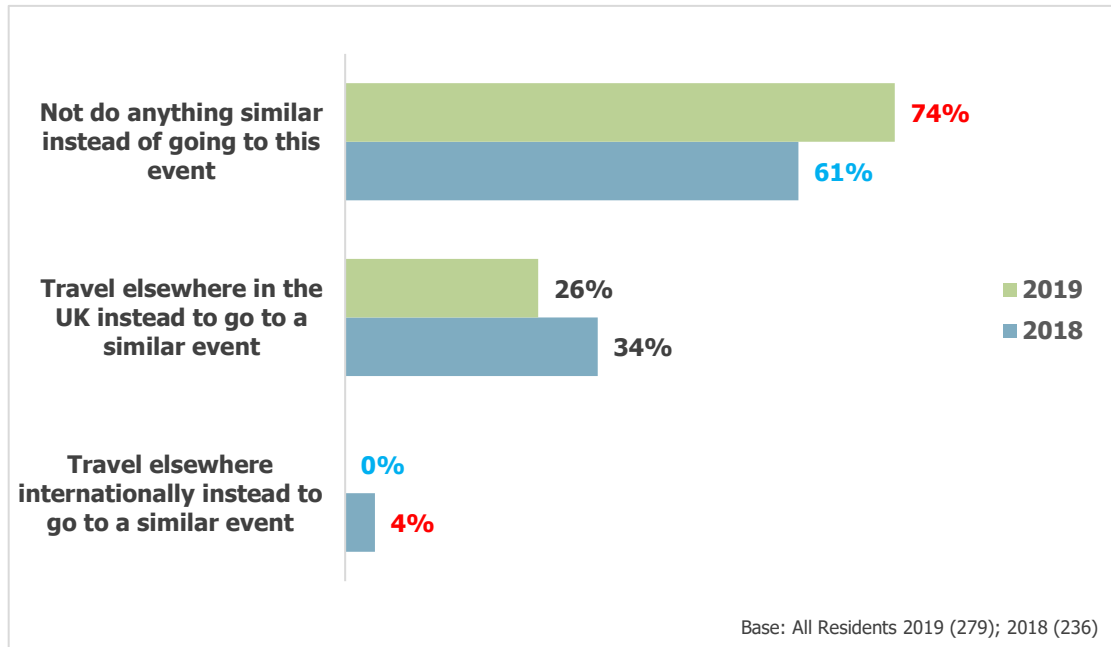


Residents' alternative behaviours

It is important for the Direct Economic Impact evaluation to establish how the existence of SIRF 2019 impacts on Residents' behaviours and specifically what Residents would do if the Festival *did not* take place. In the Direct Economic Impact calculation, the expenditure of those Residents who state they would go elsewhere to see a similar event is included in the overall expenditure data, as without SIRF this expenditure would not take place in the borough.

Figure 23 indicates that a greater proportion, around two thirds [74%], of Residents this year would not do anything similar instead of going to SIRF. Just over a quarter [26%] would travel elsewhere in the UK instead to go to a similar event, down from over a third [34%] in 2018. Also, in a decrease compared to last year, no one in the sample stated that they would be willing to travel internationally to attend a similar event if SIRF was not held in Stockton.

Figure 23: If this event were not held in Stockton, which statement best describes what you would do?



Satisfaction with and perceptions of SIRF

This section of the report considers respondents' satisfaction with and perceptions of the Festival and their experience of visiting.

Rating the Festival

Respondents were asked to rate aspects of their experience of SIRF 2019. Overall, ratings were very positive.

As in 2018, *ease of physical access* attracted the highest rate of satisfaction this year followed by the *whole experience* and *quality of the event*: all these aspects of the Festival scored significantly higher than last year. Almost all [97%] respondents rated the ease of physical access positively and similar proportions rated the whole experience and the quality of the event positively [96% and 94% respectively].

Figure 24: Thinking of the Festival, how would you rate the following?

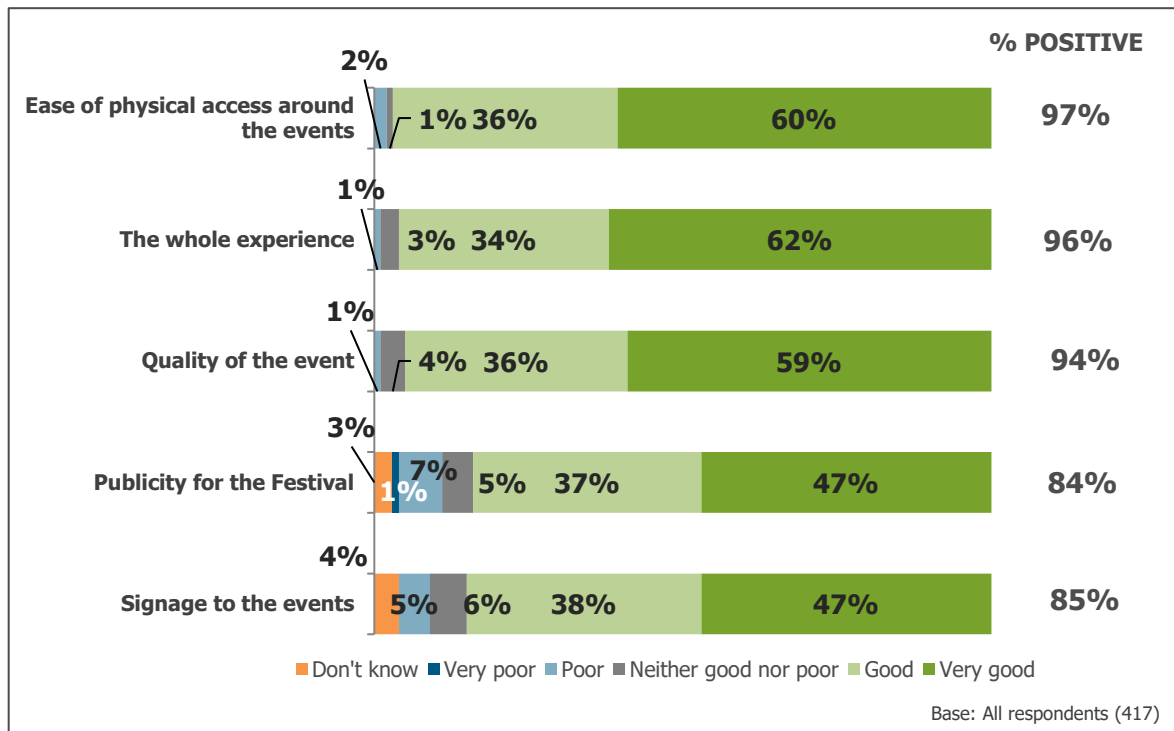


Figure 25: Comparison of positive ratings 2018 and 2019

	2019 Base: 417	2018 Base: 520
<i>Ease of physical access around the events</i>	97%	89%
<i>The whole experience</i>	96%	93%
<i>Quality of the event</i>	94%	90%



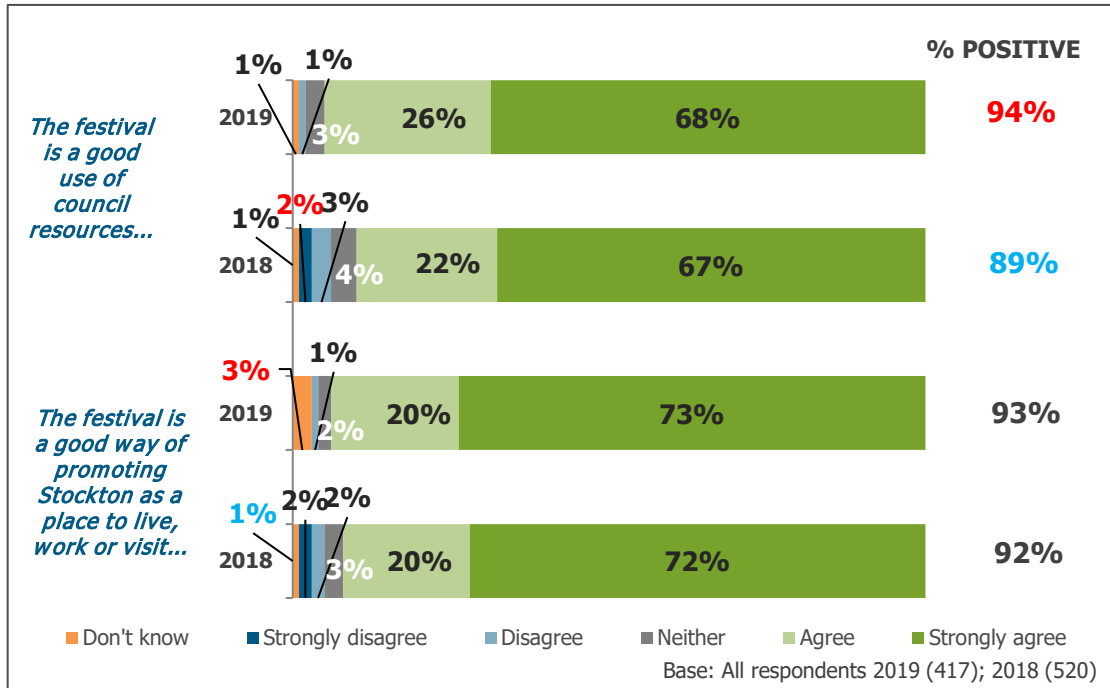
Publicity for the Festival	84%	80%
Signage to the events	85%	76%

Perceptions of the Festival for Stockton

The research also sought to evaluate how respondents perceived the Festival in the context of Stockton Borough.

The findings indicate that the Festival is highly valued by respondents with a large majority [94%] agreeing that the Festival represents a *good use of council resources*, an increase compared to last year. In line with 2018 findings, a similar proportion [93%] feel that the Festival is a good way of promoting Stockton as a place to live, work or visit.

Figure 26: Please tell me the extent to which you agree or disagree with the following statements:



Respondents were also asked if anything could have been done to increase their enjoyment of the event or SIRF 2019.

Overall, just over a third [34%] of respondents suggested that there was something that could have added to their enjoyment of the Festival or event – a significant decrease compared to 2018 [47%].

The visitors who suggested something could have been done to increase their enjoyment of the Festival were then asked what organisers could do. A few themes emerged from attendees' responses:

- Suggestions of practicalities: more available seating and better crowd management, especially for wheelchair users; high stages or tiered seating to improve visibility at



ground-level events, with several respondents pairing this with a call for areas for children to view events with large crowds.

- With a significant proportion of respondents having attended multiple SIRFs in the past, some reflected on changes to the makeup of the Festival programme across the year, raising a desire for a greater number of live music acts as well as comedy acts.
- An improved offer of food and refreshment stalls.
- A more varied programme to include activities for small children.
- Some respondents also raised concerns with signage, feeling that it may be a struggle to navigate if not already familiar with Stockton City Centre.

Propensity to recommend and return

Respondents were asked about their propensity to recommend SIRC to family or friends and to return to Stockton for SIRC 2020.

In both cases, a sizeable majority of respondents answered positively: 96% said they were likely to recommend SIRC to family or friends and a similar proportion [94%] agreed that they were likely to return for SIRC 2020. These findings were similar to those from last year.

Figure 27: On a scale from 0-10 how likely is it that you would recommend SIRC to a friend, family member or colleague?

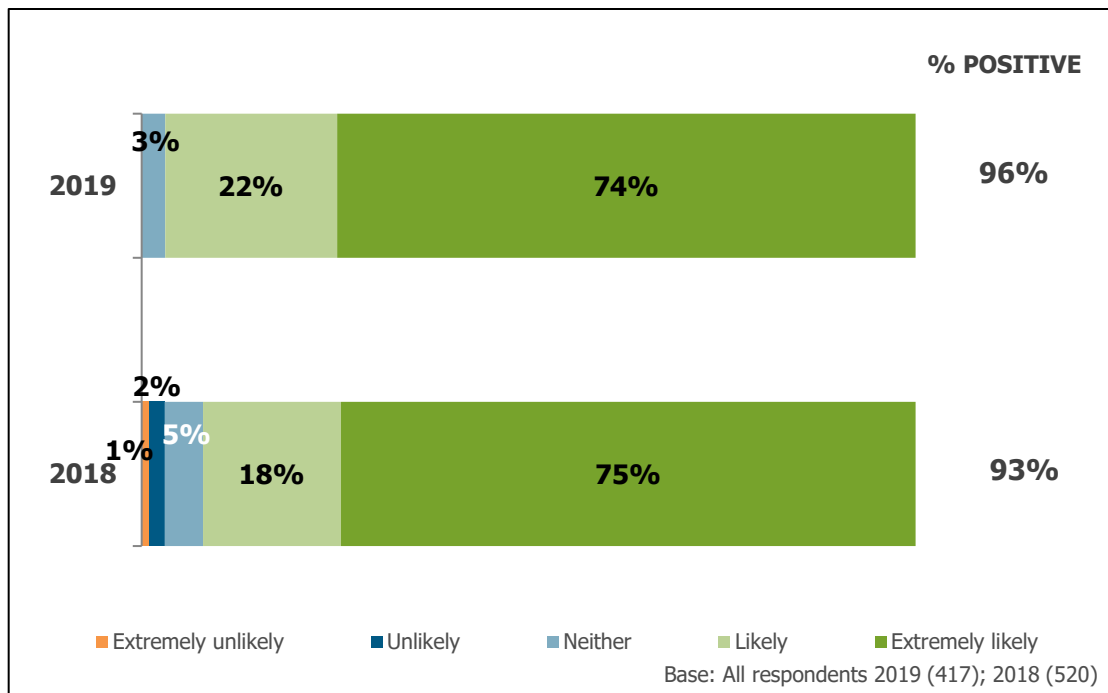
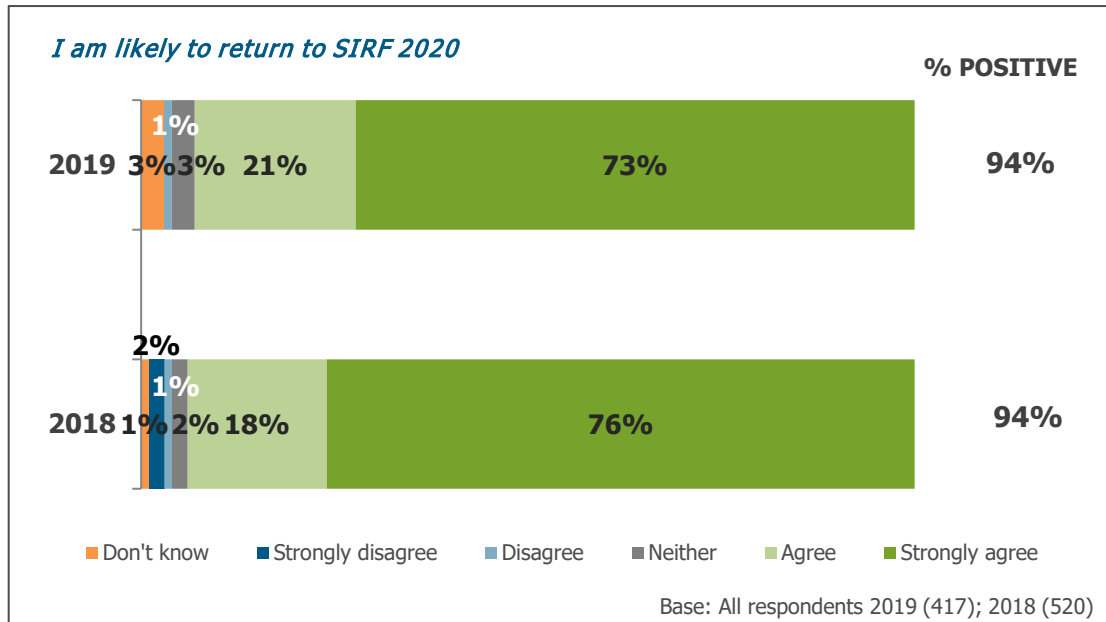


Figure 28: Please tell me the extent to which you agree or disagree with the following statements:



Engagement with arts and cultural events

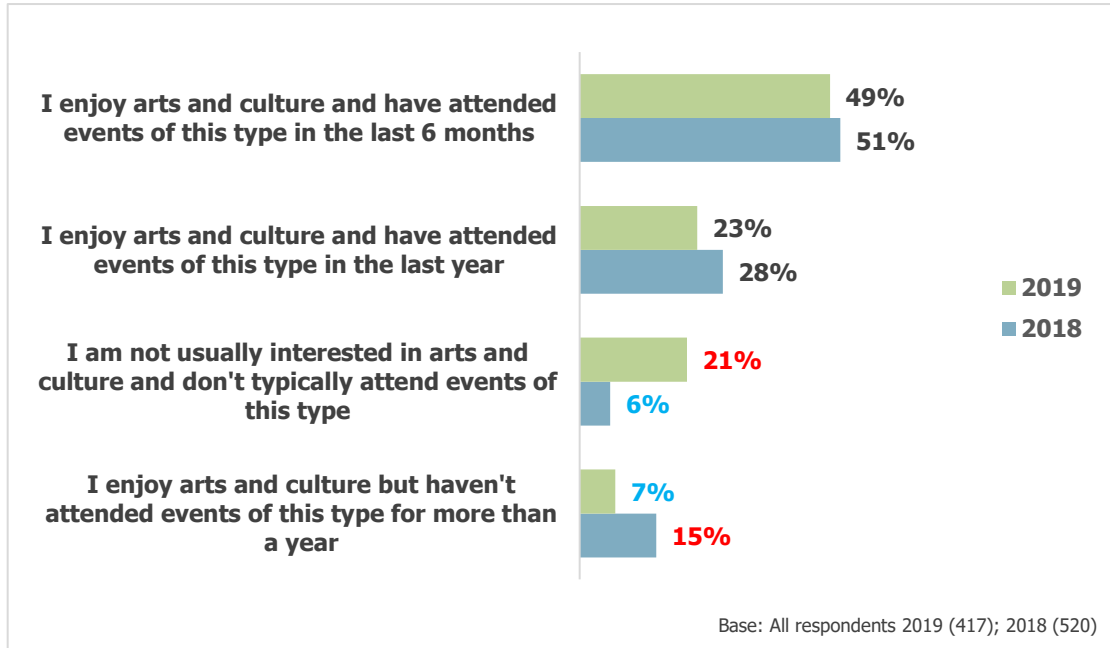
The research included questions to establish the extent to which the audience at the Festival engages with arts and culture more generally, to give an indication of the degree to which SIRF reaches people who would otherwise not be involved with the sector.

Respondents were asked to select one of the statements provided by the survey that best describes the place that arts and culture has in their life.

Approaching four in five [79%] of respondents, down on last year's 94%, said that they engage with arts and culture to varying degrees: around half [49%] said they enjoy arts and culture and have attended events like SIRF in the last 6 months. This proportion becomes almost two thirds [72%] when the time period is extended to cover the last year. SIRF 2019 attendees are substantially more likely to state that they are not usually interested in events of this type, with around one in five [21%] this year saying this compared to just over one in twenty [6%] last year.



Figure 29: Which of these statements best describes the place that arts and culture has in your life?



Audience composition

Defining the composition of the audience for SIRF 2019 is an important aspect of this research, providing the basis for the Direct Economic Impact calculation, as well as providing crucial insights into the nature and behaviour of Festival attendees.

This research categorises the audience in terms of Residents / Non-Residents (Figure 30) and Day Trips / Overnight Trips (Figure 31).

Around two thirds [67%] of the audience were Residents of Stockton Borough, whilst a third [33%] were visiting from outside the borough. This is largely in line with last year's findings.

Figure 30: Overall audience composition, Residents and Non-Residents

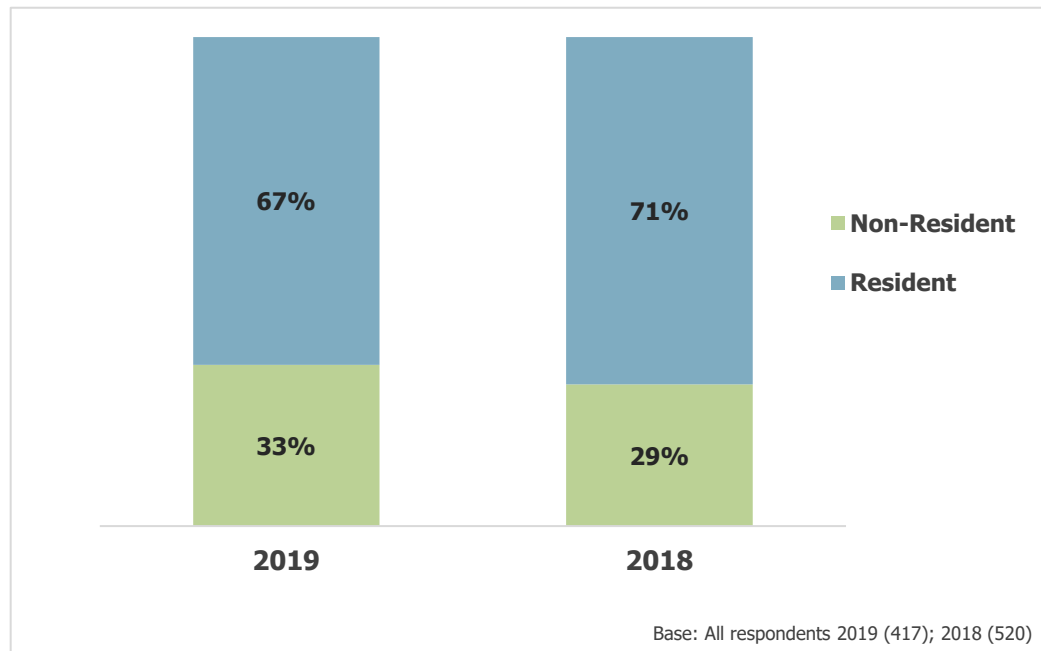


Figure 31 illustrates a further breakdown of Residents and Non-Residents into those on day or overnight trips.

As shown, the majority of visitors were on day trips [92%] – over two thirds [67%] were Residents who were on a day trip and a quarter [25%] were Non-Residents on a day trip. Around one in twelve [8%] were Non-Residents incorporating an overnight stay into their visit and, unsurprisingly, no Residents were staying overnight.



Figure 31: Audience composition by type, 2019 and 2018

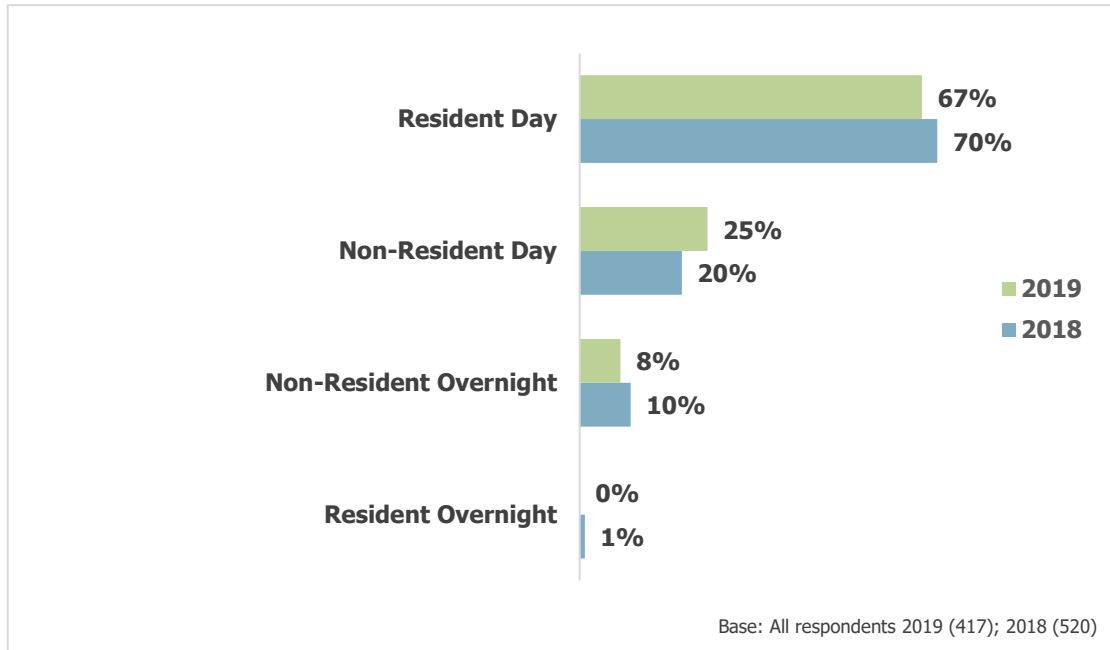


Figure 32 illustrates how the whole sample is distributed according to respondents' status (Resident or Non-Resident) and their type of visit (Day or Overnight).

These proportions are then extrapolated to show an estimate of quantities of people for each category within the overall audience, based on Stockton Borough Council's estimate that the crowd size was 59,500 across the Festival.

Figure 32: Audience composition, Residents and Non-Residents, Day and Overnight trips

	% based on sample		Estimated numbers based on 2019 crowd size 59,500*
	2019	2018	
<i>Base:</i>	<i>417</i>	<i>520</i>	
Residents on day trip	67%	70%	39,669
Residents staying overnight	0%	1%	143
Non-Residents, on day trip	25%	20%	14,982
Non-Residents, on overnight trip	8%	10%	4,706

*Estimate of audience numbers over the 4 days of SIRF 2019, provided by Stockton Borough Council



Expenditure

This section of the report considers levels of expenditure at SIRF 2019, using data generated from the research. The expenditure data below shows the average expenditure across all Residents and Non-Residents (Figure 33) and by category of expenditure (Figure 34). Note: *Not all this expenditure can be considered as additional to the local economy and does not therefore constitute Direct Economic Impact attributable to SIRF 2019, which is addressed separately in the next section of this report.*

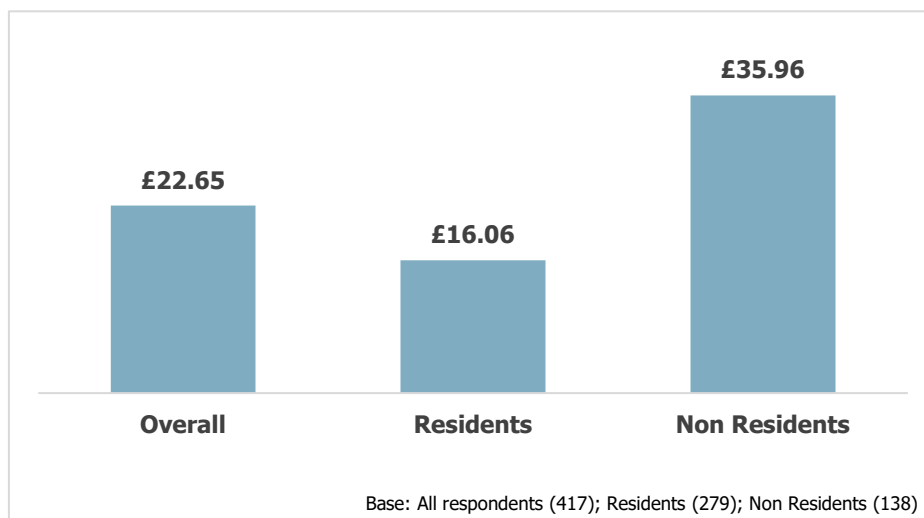
The average expenditure per person has been calculated both according to respondent type and to each category. This calculation is done by using individual responses for spend per category and group size in order to obtain a per person figure per respondent. Any respondent that stated they 'did not know how much they spent' on a category were attributed the average expenditure of those who did know how much they spend. Therefore, this ensures that the average expenditure does not change but that the total level of expenditure included their estimated spend.

Average expenditure

The overall average rate of expenditure at SIRF 2019 is estimated at £22.65 per person, with Residents spending on average £16.06 each at the event, alongside Non-Residents who spent an average of £35.96 each.

Note: We asked how much those attending had spent on travel both within Stockton and the wider region for reference. Although spend outside of Stockton cannot be included in calculations of Direct Economic Impact on Stockton itself, as an indication, inclusion of expenditure on travel outside of Stockton increases the overall spend per person to £24.16.

Figure 33 Average expenditure (including non-qualifying)



The table below provides a summary of expenditure across the different spend categories, split at a top level by Residents and Non-Residents. These values are provided, at the request of Stockton Borough Council, as an indication of the scale of gross expenditure before discounts are applied, and therefore *do not represent the Direct Economic Impact*.

Figure 34 Expenditure rates by category and type of visitor

	All Residents average £ PP	All Non-Residents average £ PP
Eating and drinking at Festival	£2.56	£4.32
Eating and drinking in / from town centre businesses	£4.91	£8.63
Overnight accommodation	£0.18	£12.55
Shopping at the festival	£1.09	£2.32
Shopping other than at the Festival	£3.31	£3.35
Travel & transport Stockton	£0.77	£1.27
<i>Travel & transport elsewhere in Tees Valley</i>	<i>£0.08</i>	<i>£1.63</i>
<i>Travel & transport in the North East</i>	<i>£0.13</i>	<i>£2.53</i>
Entertainment and recreation	£0.23	£1.18
Other	£3.00	£2.32

Calculating Direct Economic Impact

This section of the report considers the Direct Economic Impact of SIRF 2019 on Stockton Borough, using data generated from the research, supplemented, as appropriate, by information provided by Stockton Borough Council.

In calculating the Direct Economic Impact for the event, Bluegrass has followed the principles of 'EventImpacts', a methodology which is endorsed by the Department for Digital, Culture, Media & Sport (DCMS) and UK Sport among others, applying the following process:

- [a] calculating the proportions of the audiences whose expenditure 'qualifies' to be included in the impact



- [b] applying these proportions of audience type (from the primary research) to the actual audience size (from the organisers), to arrive at an approximation of the numbers of each type occurring in the actual crowd
- [c] multiplying these numbers of each type occurring in the actual crowd by the average individual spend for each type to provide an estimated expenditure by audience type
- [d] adding other known expenditure in the Stockton area attributable to the event (from the organisers) to the audience expenditure figures to arrive at an overall estimate of Direct Economic Impact

Qualifying expenditure

Not all expenditure by the audience can be included in the Direct Economic Impact, as some of it:

- would have occurred anyway and/or
- is not attributable to SIRF

Residents – Whilst resident expenditure would not usually be included in the Direct Economic Impact calculation, it is valid to count the expenditure of those Residents who would otherwise take their money out of the Stockton area if SIRF did not take place. To establish the proportion to whom this would apply, all Residents of Stockton Borough in the sample were asked to indicate *what alternative action they would take in the absence of SIRF*, to provide a measure of the scale of expenditure which is retained within the area which would otherwise be spent elsewhere. Only those Residents who would actively go out of Stockton to another event in the absence of SIRF qualify for inclusion in the Direct Economic Impact calculations.

In 2019, around a quarter [26%] of Residents in the sample indicated that they would have gone elsewhere if SIRF had not taken place in Stockton, representing 18% of the whole sample.

Non-Residents – All Non-Residents in the sample were asked whether or not their visit to Stockton was specifically to attend the festival. Only those whose presence is specifically attributable to SIRF qualify for the Direct Economic Impact calculation.

In 2019, the majority [93%] of Non-Residents in the sample indicated that SIRF was the main purpose of their trip, representing 31% of the whole sample.

Therefore, for SIRF 2019, using this principle of ‘qualifying’ and ‘non-qualifying’ Residents and Non-Residents, the Direct Economic Impact calculations are based on the following breakdown of audience composition:

Figure 35: Audience composition by ‘qualifying’ and ‘non-qualifying’

	% of total sample
Residents	67%
Made up of:	
Qualifying	18%



Non-qualifying	49%
Non-Residents	33%
Made up of:	
Qualifying	31%
Non-qualifying	2%

Base: All respondents 2019 [417]

Average Qualifying Expenditure

The rates of expenditure from the previous section have been further analysed to identify average rates of expenditure amongst only those Residents and Non-Residents who 'qualify' to be counted in the Direct Economic Impact calculation, as defined above. The figure below illustrates the resulting levels of expenditure.

Considering only these qualifying Residents and Non-Residents, the overall average rate of expenditure at SIRF 2019 was £31.12. This compares to £24.98 in 2018.

At £36.02 the average spend of Non-Residents is higher than amongst qualifying Residents, and Non-Residents are, on average, spending more than they did in 2018. Alongside this, the average spend of qualifying residents has increased slightly to £22.45 [£17.26 in 2018, £17.05 in 2017].

Figure 36: Qualifying individual average spend in Stockton, by respondent type



The following chart shows how expenditure was distributed across different spend categories in 2019.

On average, respondents were spending the most on Eating & Drinking [£11.80], decreasing slightly when compared to 2018 [£12.41]. Average spend on Accommodation, when averaged



across all qualifying respondents (including those who did not stay overnight) was £8.82, increasing from last year [£4.63] (NB: The average individual spend on accommodation when averaged across only those whose trip included an overnight stay, was £55.70).

Figure 37: Individual average spend by category



Crowd Size

Stockton Borough Council has estimated that the crowd over the 4 days of SIRF 2019 amounted to **59,500 people**.

A note from Stockton Borough Council on estimating audience numbers

Stockton Council has attempted to strengthen its method for calculating audience sizes and visitor numbers at its major events by introducing an estimated audience size for each separate event location or site and for each day or part day session. Where locations allow, these estimates are correlated with footfall counter data, which measures numbers of people in a given space, rather than audiences for an event in that space. This produces a total audience estimate which is expressed as a range to allow a margin of error. In 2019 the estimated range was 57,000 – 62,000. Bluegrass have taken a mid-point from the range to calculate the economic impact.

Audience Impact Calculations

Based on the estimated crowd size and using the proportions of qualifying audience types multiplied by the average spend by each type, the **calculation of Direct Economic Impact** has been completed, illustrated in the figure below.



Figure 38: Audience impact calculations

TYPE OF RESPONDENT	% of audience	= volume in crowd	Ave Spend	Extrapolated Spend
Qualifying Residents	17.51%	10,418	£22.45	£233,884
Qualifying Non-Residents	30.94%	18,409	£36.02	£663,092
Total Qualifying Spend				£896,976

Additional impacts

Expenditure by Stockton Borough Council on Artists and Performers

The expenditure of the Council on hospitality for artists and performers taking part in the Festival is also taken into account when calculating Direct Economic Impact.

Stockton Borough Council have provided estimates of this expenditure, adding a further £57,576 to the Direct Economic Impact value.

Direct Economic Impact Calculation

The table below shows the calculation of Direct Economic Impact using the spend totals of Qualifying Residents, Qualifying Non-Residents and the additional income from Crew and Performer expenditure, to arrive at an estimate of Direct Economic Impact.

Figure 39: Direct Economic Impact Calculation

Residents	£233,884
Non-Residents	£663,092
Additional impacts	£57,576
TOTAL	£954,552

On this basis, the estimated Direct Economic Impact of SIRF 2019 was **£954,552**.



Appendix

Interview date:	Thursday 1 st August	1	
	Friday 2 nd August	2	
	Saturday 3 rd August	3	
	Sunday 4 th August	4	

Interview location:	High Street	1	
	Church Road	2	
	Riverside	3	
	Parish Gardens	4	
	The Courtyard	5	

QA Have you seen or taken part in today's events?	Yes	1	continue
	_____	2	T&C
	No		

Good morning/afternoon/evening. My name is _____, from Bluegrass Research.

We're carrying out a survey on behalf of Stockton Borough Council to help learn more about the audience at SIRF. The survey should take around five minutes to complete. Bluegrass works in-line with GDPR and the Market Research Society code of conduct which means that all your answers will remain completely confidential and will only be used for research purposes.

Q1 Do you live in the UK?	Yes	1	Go to Q2
	-----		-----
	No	2	Go to Q4

IF YES AT Q1

Q2 Where is your permanent place of residence ?	Stockton Borough	1	Go to Q3
	Elsewhere in Tees Valley	2	
	Elsewhere in the North East	3	
	Elsewhere in England	4	
	Scotland	5	
	Northern Ireland	6	
	Wales	7	

ASK ALL WHO ANSWERED CODE 1 AT Q1

Q3 What is your full postcode? <i>This will only be used for research purposes and won't be used to contact you or passed on for any other reason</i>	WRITE IN	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



ASK ALL WHO ANSWERED CODE 2 AT Q1

Q4 What is your country of residence?

WRITE IN _____

ASK ALL

Q5 Are you aware that this event is part of **Stockton International Riverside Festival / SIRF?**

Yes _____	1	GO TO Q7 _____
No	2	GO TO Q6

ASK ALL NOT AWARE AT Q5

Q6 Are you aware of **Stockton International Riverside Festival / SIRF?**

Yes _____	1	GO TO Q7 _____
No	2	GO TO Q9

ASK ALL AWARE AT Q5 OR Q6

Q7 How did you hear about the Festival?

MULTICODE

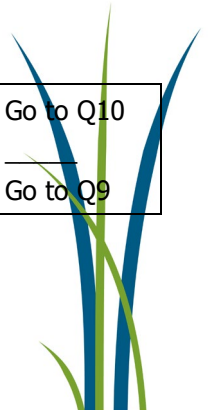
Note: If respondent says 'been before' ask if they have seen / heard anything about SIRF anywhere this year?

Local newspaper / magazine article Other newspaper / magazine article (please specify) SIRF Twitter SIRF Facebook SIRF Instagram Other social media (please specify) SIRF website Stockton Borough Council Website Other council website/signage Family Explorers Outdoor banners Leaflet through the door Brochure in public place Stockton News Stockton-on-Tees Events Guide Stockton town centre business Businesses outside of Stockton centre (e.g. Ingleby Barwick, Norton, Thornaby, Billingham) Libraries Rediscover Stockton Shop Word of mouth Just passing and came to see Other (please specify) _____		
---	--	--

ASK ALL AWARE AT Q5 OR Q6

Q8 Is the Festival / this event the main reason for being here / your visit today?

Yes _____	1	Go to Q10 _____
No	2	Go to Q9



ASK IF UNAWARE AT Q6

Q9 What is the main purpose of your visit here today?
MULTICODE

Other entertainment / tourist attraction	1	
Shopping	2	
A leisure day trip	3	
Going to a bar or restaurant	4	
Visiting friends for the day / evening	5	
Other (please specify) _____	6	

ASK ALL

Q10 Have you visited Stockton International Riverside Festival before?

Yes	1	Go to Q11
No	2	Go to Q13

ASK IF YES AT Q10

Q11 When was your last visit before this year?

Last year	1	
Two years ago	2	
Three years ago	3	
Between four and five years ago	4	
More than five years ago	5	

ASK IF YES AT Q10

Q12 And how many SIRF Festivals have you visited before?

WRITE IN NUMBER		
-----------------	--	--

ASK ALL

Q13 Are you visiting with other people?

Yes	1	Go to Q14
No	2	Go to Q15

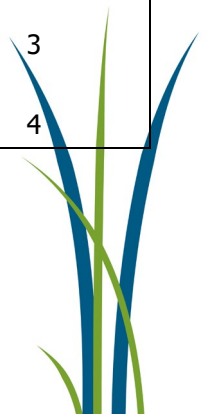
ASK IF YES AT Q14

Q14 Not including yourself, how many of those you are visiting with are aged....

Under 3	1
Aged 3-12	2
Aged 13-15	3
16 or older	4

Q15 I'd like you to think about arts and culture. So, for example, **museums, galleries, theatre, dance, music and literature/book festivals.** Which of these statements best describes the place that arts and culture has in your life?
SINGLE CODE

I enjoy arts and culture and have attended events of this type in the last 6 months	1
I enjoy arts and culture and have attended events of this type in the last year	2
I enjoy arts and culture but haven't attend events of this type for more than a year	3
	4



I am not usually interested in arts and culture, and don't typically attend events of this type	
---	--

ASK IF AWARE AT Q5 OR Q6

Q16 Which of the following describe your motivations for visiting today?
MULTICODE

Q16b And which of these was your **main** motivation?

SINGLE CODE

To spend time with friends / family	1	
For a special occasion	2	
For peace and quiet	3	
To be intellectually stimulated	4	
To be entertained	5	
To be inspired	6	
To do something new/out of the ordinary	7	
To learn something	8	
To enjoy the atmosphere	9	
For reflection	10	
Attending festivals is an important part of who I am	11	.
To escape from everyday life	12	
For academic reasons	13	
For professional reasons	14	
To entertain my children	15	
To educate / stimulate my children	16	
Other (please specify)	17	

ASK ALL

Q17	And thinking of the Festival, how would you rate the following? INTERVIEWER CODE 6 IF DON'T KNOW/NO OPINION						
		Very poor	Poor	Neither good nor poor	Good	Very good	D/K
	Quality of the event	1	2	3	4	5	6
	The publicity for the Festival	1	2	3	4	5	6
	Ease of physical access around the events	1	2	3	4	5	6
	Signage to the events	1	2	3	4	5	6
	The whole experience	1	2	3	4	5	6



Q18	Please tell me the extent to which you agree or disagree with the following statements? INTERVIEWER CODE 6 IF DON'T KNOW/NO OPINION						
		Strongly disagree	Disagree	Neither	Agree	Strongly agree	D/K
	The festival is a good use of council resources	1	2	3	4	5	6
	The festival is good for promoting Stockton as a place to live, work or visit	1	2	3	4	5	6
	I am likely to return to Stockton for SIRF 2020	1	2	3	4	5	6

Q19	On a scale of 0-10, how likely is it that you would recommend Stockton International River Festival to a friend, family member or colleague, with 10 being extremely likely and 0 being not at all likely?										
	Not at all likely										Extremely likely
	0	1	2	3	4	5	6	7	8	9	10

RESIDENTS GO TO Q21, ASK ALL NON-RESIDENTS

Q20	Which of these have you done or intend to do on this visit to Stockton?	Visit a restaurant / cafe	1	
		Visit a pub / bar	2	
		Shopping	3	
		Work	4	
		Attend a sporting event	5	
		Visit a historic site	6	
		Other arts / cultural activity	7	
		None of the above	8	

NON-RESIDENTS GO TO Q22, ASK STOCKTON RESIDENTS ONLY

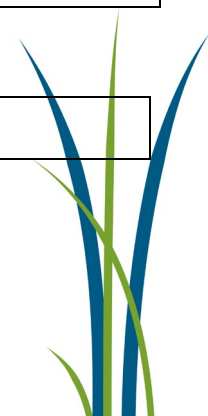
Q21	If this event were not held in Stockton which of the following statements best describes what you would do? Would you.....?	Travel elsewhere in the UK instead to go to a similar event	1	
		Travel elsewhere internationally instead to go to a similar event	2	
		Not do anything similar instead of going to this event	3	

ASK ALL

Q22	Does your visit to the Festival include an overnight stay away from home ?	Yes	No
		1	2
		Go to Q23	Go to Q26

ASK ALL STAYING OVERNIGHT AWAY FROM HOME

Q23	How many nights are you spending away from home for the Festival?	<input type="text"/>
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ASK ALL STAYING OVERNIGHT AWAY FROM HOME

Q24 Where are you staying?

Stockton Town Centre	1	
Elsewhere in Stockton	2	
Elsewhere in Tees Valley	3	
Elsewhere in North East England	4	
Other	5	

ASK ALL STAYING OVERNIGHT AWAY FROM HOME

Q25 Which type of accommodation are you staying in?

B&B / Guest house	1	
Hotel	2	
Caravan / Camping	3	
With Friends / Family	4	
Self catering	5	
Group accommodation [e.g. University / Youth Hostel]	6	
Second home	7	
Other (please specify)	8	

ASK ALL

Q26 How much do you estimate you will spend on yourself and others on each of the following items or activities today? For each item, we would like to know only the amount you will spend **in Stockton** during your visit to the Festival /SIRF.
Please estimate values to nearest £.
Please enter a value for each category, 0 if nothing spent, or tick DK if unable to estimate

Eating and Drinking at festival (not town centre businesses)	£	<u>DK</u>
Eating and drinking in/from town centre businesses	£	
Shopping at the festival	£	
Shopping other than at the festival	£	
Entertainment / recreation	£	
Travel and transport in each of these places (if travelling by car, where you filled up with fuel):	-----	
Within Stockton	£	
From elsewhere within Tees Valley		
From elsewhere within the North East		
Other _____		
Overnight accommodation (if applicable)	-	
WRITE IN		

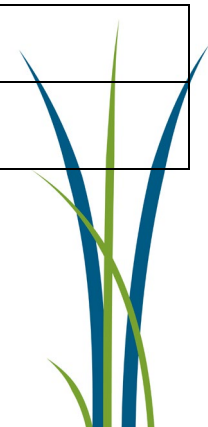
Q27 How many people does this cover?

ASK ALL

Q28	Could anything have been done to increase your enjoyment of today's event or SIRF 2019 in general?	Yes	No
		1	2

IF YES AT Q28

Q29	What could have been done?
	WRITE IN



ASK ALL

Q30 Which age category do you belong to?

16 – 19	1	
20 – 24	2	
25 – 29	3	
30 – 34	4	
35 – 39	5	
40 – 44	6	
45 – 49	7	
50 – 54	8	
55 – 59	9	
60 – 64	10	
65 – 69	11	
70 – 74	12	
75 – 79	13	
80 – 84	14	
85+	15	
Prefer not to say	16	

Q31 Which of the following best describes how you think of your gender identity?

Male	1	
Female	2	
In another way (please specify)	3	
Prefer not to say	4	

Q32 How would you describe your **working status**?

Full time employed	1	
Part time employed	2	
Self employed	3	
Unemployed seeking work	4	
Permanently ill / disabled	5	
Retired	6	
Student	7	
Other, please state	8	
Refused	9	



Q33 To which of these ethnic groups do you consider you belong?

- | | | | |
|---|----------------------------|---|-----------------------------|
| <u>White</u> | | <u>Mixed</u> | |
| English/Welsh/Scottish/N Irish/British..... | <input type="checkbox"/> 1 | Mixed White and Black Caribbean..... | <input type="checkbox"/> 10 |
| Irish | <input type="checkbox"/> 2 | Mixed White and Black African | <input type="checkbox"/> 11 |
| Gypsy or Irish Traveller | <input type="checkbox"/> 3 | Mixed White and Asian | <input type="checkbox"/> 12 |
| Any other White background | <input type="checkbox"/> 4 | Other mixed/multiple ethnic background .. | <input type="checkbox"/> 13 |
| <u>Asian or Asian British</u> | | <u>Black or Black British</u> | |
| Indian | <input type="checkbox"/> 5 | Caribbean | <input type="checkbox"/> 14 |
| Pakistani..... | <input type="checkbox"/> 6 | African..... | <input type="checkbox"/> 15 |
| Bangladeshi..... | <input type="checkbox"/> 7 | Any other Black background | <input type="checkbox"/> 16 |
| Chinese | <input type="checkbox"/> 8 | <u>Other ethnic group</u> | |
| Any other Asian background | <input type="checkbox"/> 9 | Arab | <input type="checkbox"/> 17 |
| | | | |
| Prefer not to answer | | | |
| Other (<i>Please write in</i>) | | | <input type="checkbox"/> 18 |

Q34 [a] Do you identify as a D/deaf or disabled person, or have a long-term health condition?
[b] Does anyone in your party today identify as a D/deaf or disabled person, or have a long term health condition?

	[a]	[b]	
Yes	1	1	
No	2	2	
Prefer not to say	3	3	

ASK ALL WHO ANSWER YES AT Q34 [A] AND OR [B]

Q35 Are there any ways SIRF organisers could improve accessibility for you/them?

WRITE IN _____

Data Protection

To monitor quality, a small proportion of respondents are re-contacted to check that proper procedures have been followed. For this reason, may I ask for the following contact information?

Your data will only be used for this purpose and will be deleted/ anonymised following this process. Your details will not be passed on to any third parties or used for marketing purposes. Bluegrass works in-line with GDPR and the Market Research Society code of conduct.

Please be assured that your details will only be used in this manner. If you would prefer not to give us this information, your responses to the survey will still be used and we thank you for taking part.

FOR BACK CHECK PURPOSES ONLY	
Respondent's Name:	
Tel. No:	
INTERVIEWER: PLEASE ENSURE YOU RECORD THESE DETAILS, FAILURE TO DO SO MAY LEAD TO A DEDUCTION FROM YOUR PAY.	

INTERVIEWER – THANK RESPONDENT AND MRS CERTIFICATION

