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Evaluation of Lumiere 2011

Artichoke

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Final Report

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Lumiere 2011: Key Facts

<i>Date</i>	17th – 20th November 2011
<i>Duration</i>	Four days
<i>Audience</i>	150,000 est. (compared to 75,000 est. in 2009)
<i>% of UK visitors from Durham</i>	44% (up from 28% in 2009)
<i>% of UK visitors from rest of North East</i>	35% (down from 53% in 2009)
<i>% of UK visitors from rest of UK</i>	21% (up from 17% in 2009)
<i>% from overseas</i>	3% (up from 2% in 2009)
<i>Bednights generated</i>	17,984
<i>% in Durham specifically for Lumiere</i>	74% (95% in 2009)
<i>Total no. of installations</i>	35 (22 in 2009)
<i>Overall experience</i>	82% of visitors extremely positive about the festival (8 out of 10 in 2009)
<i>Total Cost</i>	£1,500,000 (£600,000 in 2009)
<i>PR Value</i>	£2,250,000 (£700,000 in 2009)
<i>Value of contracts placed in region</i>	£404,000
<i>Total Economic Impact</i>	£4,330,628 (£1,535,232 in 2009)
<i>Durham County Council ROI</i>	983%
<i>Funding Profile</i>	29% Durham County Council, 24% Artichoke, 10% Arts Council England, 5% European Commission, 32% other statutory funding, trusts, foundations, embassies, sponsors, ODA and individuals.

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Executive Summary

The Durham Lumiere was a four-day light festival held in Durham City over the period 17th-20th November 2011. The festival, produced by Artichoke with support from Arts Council England, Durham County Council, European Commission Culture Programme and a range of business sponsors and other funding bodies, attracted 150,000 visitors over the course of four days. The producers commissioned artists to create 35 unique installations which were then placed in various locations in Durham city centre. Miller Research were commissioned to evaluate the impact of the festival on Durham, its residents and visitors of the festival.

The evaluation surveyed over 1,500 people before, during and after the festival and found that visitors were overwhelmingly positive about their experience with eighty-two percent of respondents to the Lumiere survey stating that it was either good or very good. Eighty-nine percent thought that the art installations were good or very good and seventy-six percent had similar sentiments about the publicity material. In addition, respondents were positive about the festival staff, car parking / park and ride, public transport links and signage, directions and maps. Although respondents were less positive about accessibility and crowd management, they were willing to offer ideas for improvement in future years.

Forty-four percent of the visitors originated from within County Durham to visit Lumiere, thirty-five percent from the North East of England and twenty-one percent from elsewhere in the UK. Three percent of the overall sample were from overseas. There had been a 50% rise in the proportion of visitors coming from overseas compared to the 2009 festival when only two percent of the visitors were international. Overall, seventy-five percent of survey respondents had visited Durham specifically to visit the Lumiere festival.

Respondents were extremely positive about the socio-economic impact of Lumiere on Durham: ninety-five percent stated that the festival was good for the regional economy, ninety-four percent stated that Lumiere puts Durham on the cultural map, ninety-one percent said that Lumiere made them happy and ninety-five percent thought that Lumiere was a positive thing for Durham. Visitors who had not visited Durham before cited that their experience was better than expected. In comparison to the 2009 event, respondents planned to visit the festival further in advance, probably reflecting the larger proportion of people visiting the festival from further afield.

Respondents spent slightly more than they did at the 2009 festival at approximately £28 per head compared to £26 in 2009, although the upper estimate for average spend per visitor for the 2011 event was £36. The average respondent stayed at the festival for 1.6 evenings and sixteen percent of respondents were staying in paid accommodation for at least one night. The festival attracted visitors from a diverse range of demographic, professional and socio-economic backgrounds.

Businesses, accommodation providers and tourist attractions in and around Durham were also very positive about the event with fifty percent stating that it had a positive impact (only eight percent said that it had a negative impact). Sales, occupancy rates and visitors to tourist attractions were up on the same period the previous week and the previous year. Approximately one-third of attractions surveyed had received additional visits from people who had come to the area because of Lumiere. These were felt to include guests from overseas and elsewhere in the UK, as well as the NE Region.

The economic impact of the Lumiere festival on Durham is estimated to be approximately £4.3m including a PR value of £2.25m (to be confirmed) and local contracts worth £404,000 - a one hundred and eighty-two percent increase on the impact of the 2009 festival and a return on investment of 983%¹.

¹ Based upon DCC investment of £400,000

1. Introduction

Lumiere festival in Durham is a biennial four-day light festival, organised and run by Artichoke, a creative arts charity based in London and funded by Arts Council England. Lumiere 2011 took place over the dates 17th-20th November and included 35 artworks created by local and international artists. The artworks, all based around the concept of light, were installed at various locations in the city centre, from Durham Cathedral to the streets and bridges. Artichoke were partnered by Durham County Council, Arts Council England and a range of business sponsors and other funding bodies to help deliver the festival.

1.1. Aim of the report

In July 2011, Miller Research (UK) Ltd were commissioned by Artichoke to conduct an in-depth evaluation of the social and economic impact of the Lumiere 2011 Festival. An evaluation of this kind aims to highlight the successes of the festival and to identify any areas for further improvement which may help to inform future development of the festival.

1.2. Fieldwork Approach and Reporting Structure

This report collates primary evidence relating to the Lumiere festival. The first chapter presents an overview of the festival including its history, funding and rationale. The ensuing chapters then focus on the perception of the festival from the viewpoint of the visitor and local businesses (retail, accommodation and tourism).

In total, the evaluation consulted approximately 1,500 visitors and businesses through a variety of approaches in the weeks before, during and after the festival. These were:

- **A pre-event online survey;**
 - The pre-event online survey obtained responses from 141 people, 132 of which intended to visit the festival. The survey ran for 9 days from the 9th November until the 17th November, when the festival started. The survey was accessed through a link embedded on the Lumiere website and respondents were incentivised to complete it by entering them into a prize draw to win Amazon and M&S vouchers worth £100.
- **A touchscreen survey during the event;**
 - The touchscreen survey gathered 595 responses over the four days of the festival. During the day, each of the four touchscreen terminals were housed within the Lumiere Hub in Walkergate. During the evenings, one of the screens was set up in various locations around the festival to provide visitors with a mobile survey point. Visitors to the Hub were incentivised to complete the survey by offering them tea/coffee and biscuits as they went through the questions and by offering them the opportunity to be entered into the prize draw.
- **A post-event online survey;**
 - The post-event online survey gathered responses from 668 people, 658 of which visited the festival. The survey was open from the 17th November until 20th December 2011 and could be accessed through a similar link placed on the Lumiere

website. Respondents were incentivised to complete the survey by entering them into the same prize draw as for the pre-event online survey.

- **A post-event online survey of accommodation providers;**
 - 40 accommodation providers in and around Durham City responded to an online survey distributed to 223 accommodation providers in the Durham area in the weeks following the festival (response rate of 18%). They were selected via the Visit County Durham database and were also offered the chance to be entered into the prize draw to incentivise them to take part.
- **A post-event online survey of 11 tourist attraction providers;**
 - 11 tourist attraction providers in Durham and the surrounding area responded to a similar online survey distributed to 38 tourist attraction providers in the Durham area in the weeks following the festival (response rate of 29%). Similarly to the accommodation providers, they were contacted via the Visit County Durham database of tourist attractions and were again offered the chance to be entered into the prize draw to incentivise them to take part.
- **A hard-copy survey of city centre businesses.**
 - 56 businesses in Durham city centre responded to a survey in hard-copy format, which was hand-delivered to all retail and service premises to encourage them to participate (response rate of 26%). These were further incentivised by entering them into the same prize draw.

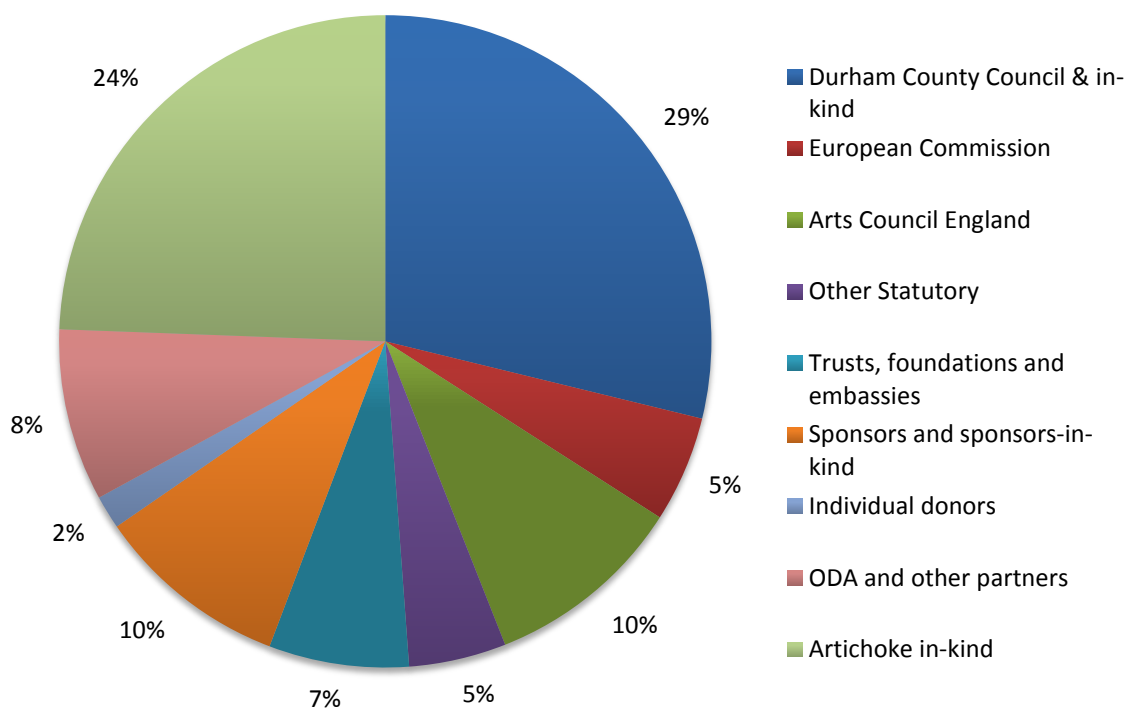
The subsequent sections of this document draw conclusions from all surveys, and report the results from the visitors' point of view, and then from the business perspective. The report then identifies particular issues and challenges for Lumiere, and sets out a series of recommendations for future years.

2. Lumiere Festival

2.1. Background and Funding

The event was produced by Artichoke with significant support from Durham County Council, Arts Council England, the European Commission Culture Fund and a panoply of other statutory funders, trusts, business sponsors and donors. The total cost of the event was around £1,000,000, or £1.5m if in-kind costs are included. While business sponsorship was hard to find, a range of businesses did support the event, including the Radisson Hotel, Northumbrian Water, East Coast, Thorn, Philips and many others. Invaluable in-kind support was given by other partners including Durham University and Durham Cathedral. The following pie shows a breakdown of cash and in-kind funding for the Lumiere festival 2011.

Figure 1 – Cash and in kind funding breakdown of Lumiere 2011



2.2. Website

A new website was constructed by ID Media, including a mobile version for smartphones which was sponsored by Visit County Durham. The new site was built to accommodate a wealth of content designed to amplify the visitor's experience, and to allow those who did not attend in person to enjoy the event virtually. Content includes video and audio interviews with artists and local historian Martin Roberts, as well as details on every installation and artist. From its launch date to December 2011, the site received 1.4m page views and 272,299 visits from 95,768 unique visitors. 40,000 of these visits came from mobile devices, including iPhones, iPads and Android phones.

2.3. Press

The Festival generated much positive press coverage, including significant national coverage, which was entirely positive. Highlights included a double page spread in The Observer, a piece in The Guardian, a photo in The Daily Telegraph, and a four minute feature on BBC's UK News 24 which ran throughout Sunday 20th and was seen as far afield as Hong Kong, Pakistan and Vietnam. Regionally there was much excellent coverage, and BBC Newcastle and the Northern Echo acted as media partners, with the Echo running a four-page supplement after the event.

In total, the festival generated an estimated £2.25m of PR value for Durham. Coverage of the festival was much higher than for the 2009 festival with 356 pieces being generated, as opposed to 97 in 2009. Of these, 188 were local press articles, compared to a figure of 24 in 2009.

2.4. Social Media

There was much comment on the Artichoke facebook page, on the website (some 750 comments to date) and on Twitter, with some 1,500 tweets (almost exclusively positive) reaching some 151,000 followers. To date, over 5,000 photos have been uploaded to Flickr with the lumieredurham tag.

2.5. Sustainability

The Lumiere team made a great effort to minimise the environmental impact of the festival by encouraging visitors to travel to the festival by public transport and ensure that they turned off all their lights at home whilst they visited the festival. Artichoke worked with artists and suppliers to make sure that artworks were as energy efficient as possible. Many used low-energy lighting technology, and street lights and flood lighting around the installations were turned off which further helped to save energy.

3. The Views of Individuals

This section presents the combined results of the touchscreen survey of individuals attending Lumiere, and the pre and post event online surveys. Where practical, results have been broken down to show where respondents came from – in terms of those with County Durham postcodes, those living elsewhere in the NE Region, and those from outside the region.

3.1. Awareness of the Lumiere festival

Figure 2 shows that 43% of respondents found out about Lumiere through an advertisement of some sort, compared to 28% that had heard about the festival from someone else and 13% who said that they followed Artichoke's work. This last figure, for awareness of Artichoke's work, may have been affected by respondents having visited the event in 2009. Other means of hearing about the festival included: visiting it in 2009, general awareness from living near the installations in Durham and internet searches. Other respondents were unsure of where they had heard about the festival.

Figure 2 - How did you find out about Lumiere?²

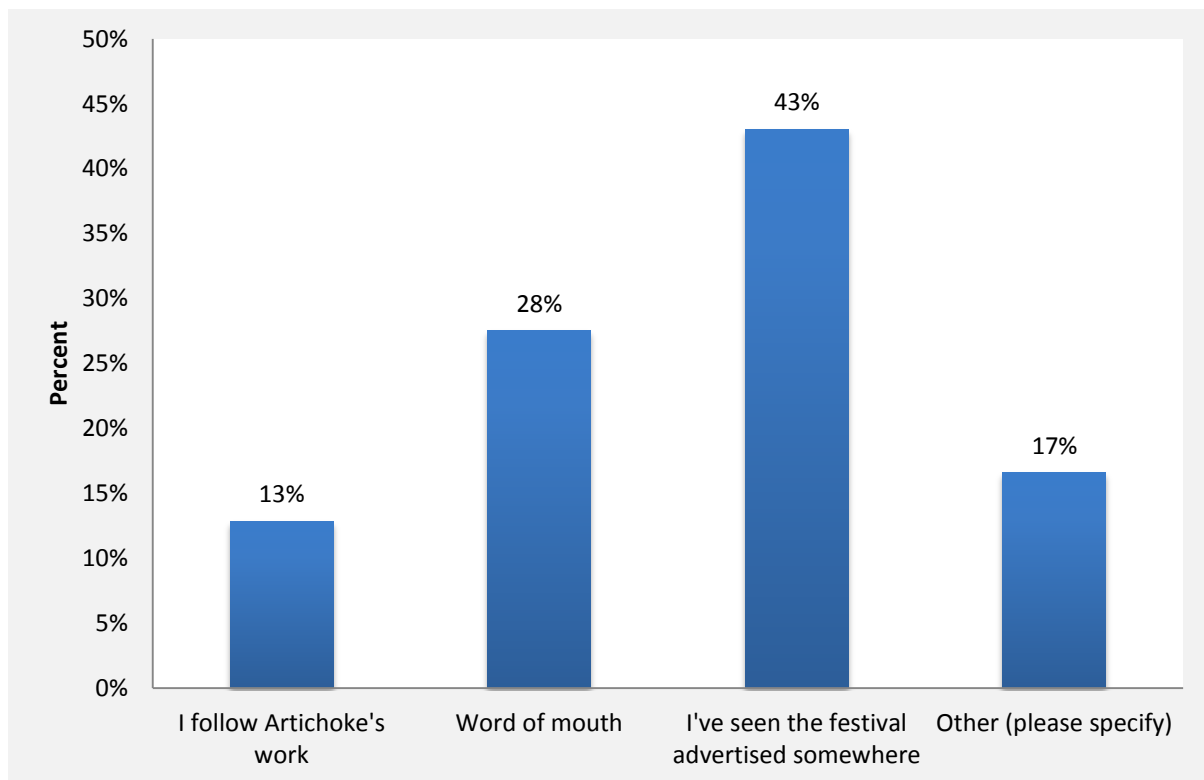
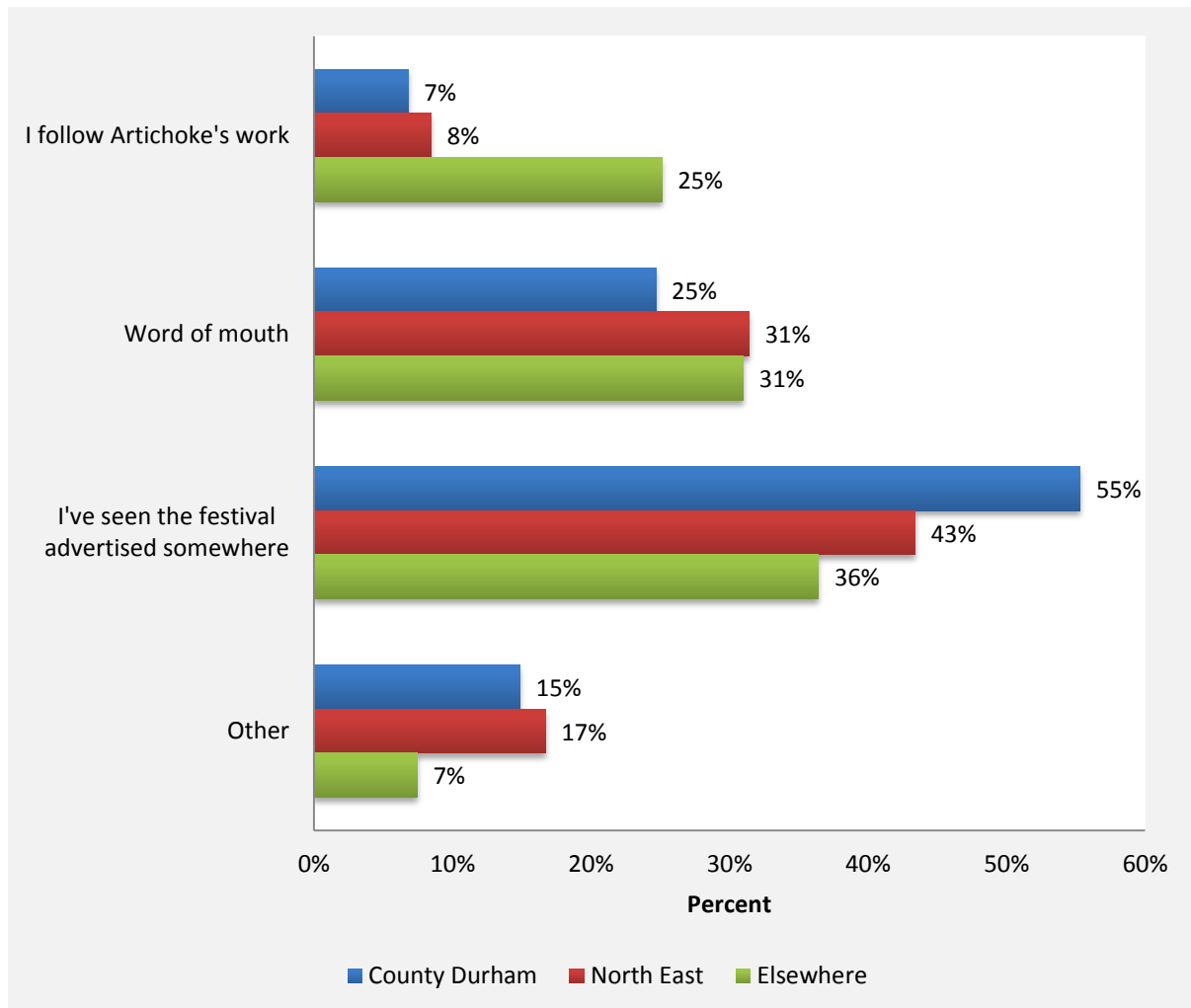


Figure 3 shows that surveyed visitors of the Lumiere festival from outside the NE region were much more likely to follow Artichoke's work and thus more likely to travel further to see it. A quarter of visitors from further afield stated that they had heard of Lumiere because they follow Artichoke rather than by any other means. In comparison, 7% of respondents from County Durham had heard of the festival through Artichoke. Fifty-five-percent of County Durham residents responding heard about the festival through seeing it advertised somewhere, with advertising accounting for diminishing proportions the further away that respondents lived. People who lived outside the

² Captions include the exact question asked in the survey as to ensure clarity of the results for the reader.

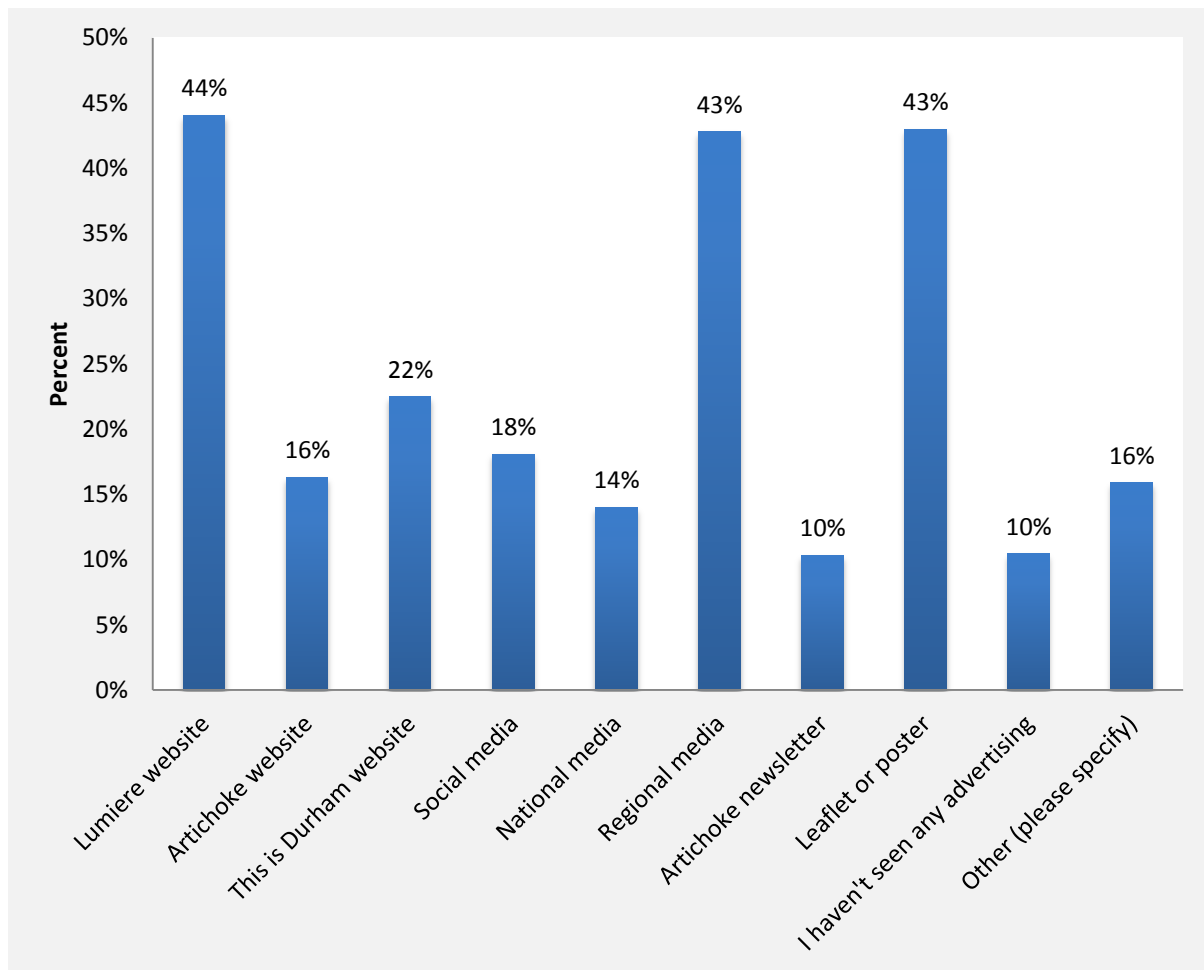
county were proportionately more likely to have heard of the festival through word of mouth than those who lived in the city itself.

Figure 3 - Awareness of Lumiere by residence



The most commonly recognised sources of advertising were the ‘Lumiere website’, mentioned by 44% of respondents, followed closely by ‘regional media’ and ‘leaflet or poster’, each at 43% of respondents. This would clearly have been slightly biased by the fact that the post-event online survey was accessed through the Lumiere website, but 32% of touchscreen survey respondents stated they had seen the event advertised on the Lumiere website. Other advertisements cited by respondents included the ‘This is Durham’ website, social media and the Artichoke website. About 1 in 10 respondents had not seen any advertising at all.

There has been an increase in participants hearing about the event via social media from just under 10% in 2009 to nearly 20% in 2011. This is likely to be a result of increased efforts to advertise the festival through social media, combined with an increase in the use of social media sites by the general public. Leafletting and regional press were more prominent in responses than for the 2009 event, where only 23% and 28% respectively had heard of the festival through these means.

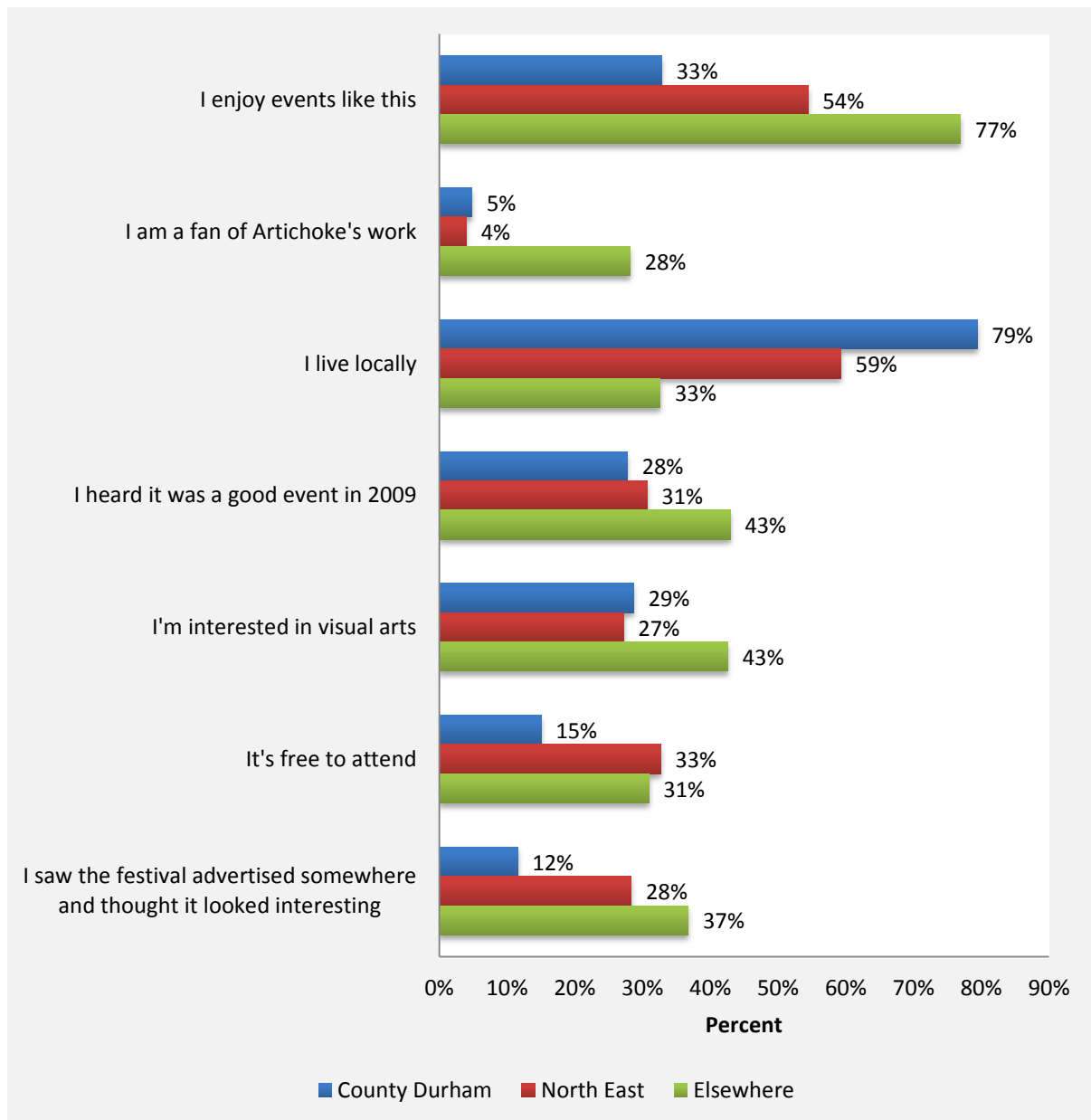
Figure 4 - Where did you see Lumiere advertised?

3.2. Reasons for visiting / not visiting

The two main reasons why respondents chose to visit the Lumiere festival this year were that they were local (62%) or that they enjoy events like Lumiere (52%). The reputation of the 2009 event was a significant attractor, as was 'an interest in visual arts' and advertising that 'looked interesting'. Approximately a quarter of the sample were attracted to the event because it was free to attend. Other attractors included: 'being a fan of Artichoke's work', 'visiting Durham on holiday' and 'just happened to be passing'.

The graph below shows that more than three-quarters of respondents from outside of the region attended because they enjoy events like Lumiere – that is the event was strong enough to be an attractor. Aside from this, respondents from other parts of the UK were much more likely to be fans of Artichoke's work, which is supported by Figure 3. However, respondents were restricted to three choices only and therefore the likelihood of local respondents selecting the 'I live locally' option may have diluted the likelihood of selecting other options. Respondents from Durham were the least likely to state that the event being free was one of the main reasons for them attending.

Figure 5 – What are your main reasons for visiting Lumiere? (By respondent location)



Respondents to the online survey who did not attend were asked why this was, albeit the sample size for these people was so low the results were not statistically significant. As an indication however, there were slightly more people specifying that the festival did not appeal to them, than the fact that Durham was too far away or that they were busy elsewhere.

Figure 6 below shows that 75% of all respondents to the survey were visiting Durham specifically for the festival and only 30% expected to visit, or had visited other festivals this year. The chart suggests that for a large proportion of respondents, Lumiere 2011 will have been the only festival they would attend in 2011.

Other events attended comprised a diverse range of music, food and arts festivals across the whole of the UK from events such as the Bishop Auckland Food Festival to the Glastonbury music festival.

Figure 6 - Whether respondents had visited Durham specifically for Lumiere / Had they visited any other festivals this year?

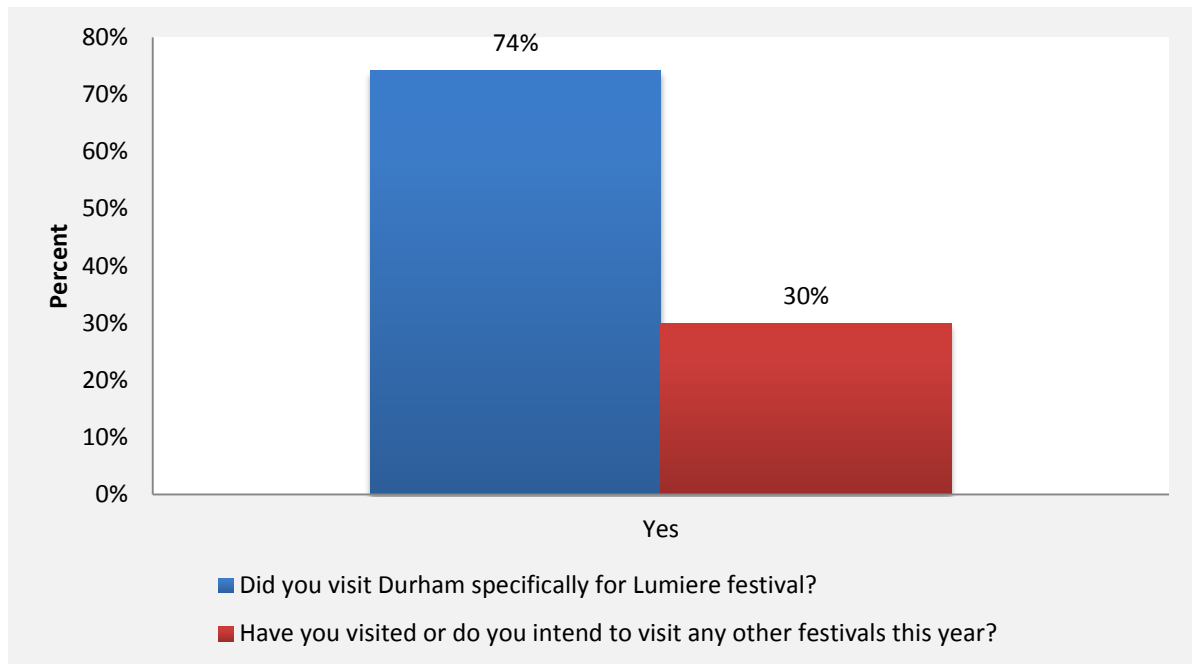
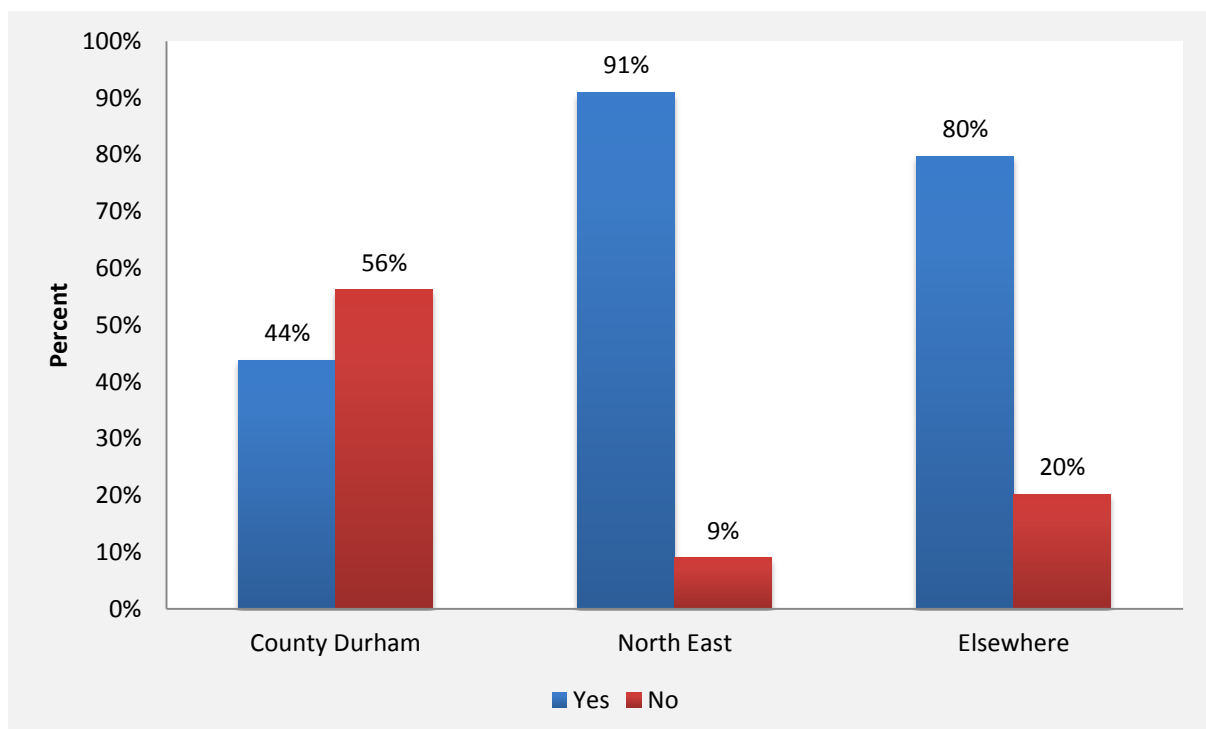


Figure 7 shows whether respondents had visited Durham specifically for Lumiere festival segregated by whether they came from within County Durham, within the North East region (excluding Durham) or from elsewhere in the UK. More than 90% of those from the NE Region and 80% of those from outside the region were visiting specially, demonstrating the attraction of the event. Respondents from Durham were less likely to be visiting the City centre specifically for Lumiere than respondents from other areas, but this might be expected.

Figure 7 - Are you in Durham specifically for Lumiere festival?



3.3. Ratings

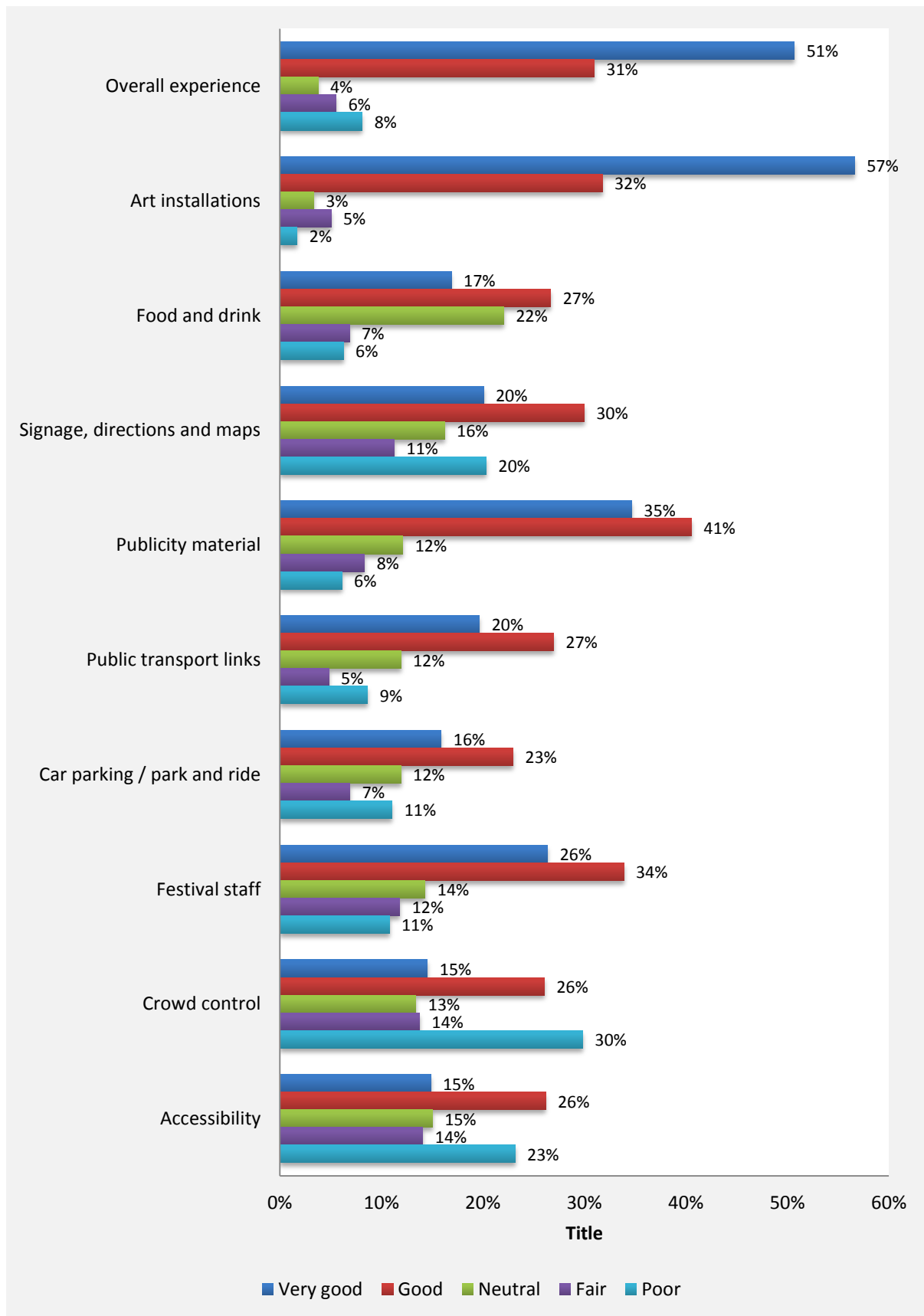
Respondents were asked to rate various aspects of the festival. Highest ratings overall were for the art installations themselves, with 89% rating them as either good or very good and over half agreeing that they were very good. The overall experience was also highly rated, with 82% of respondents rating it as good or very good.

Other highly regarded aspects of the festival were the 'publicity material' (86% stating good or very good), the 'festival staff' (60% good or very good) and 'signage, direction and maps' (50% good or very good). Elements which scored less highly included: 'crowd control', 'accessibility' and 'signage, directions and maps'. However these respondents were in the minority and the aspects should be considered 'less good' rather than 'bad'.

Overall then, the festival was highly regarded by respondents and although crowd control, accessibility and signage are clearly issues that need to be addressed for further years, the large majority of people clearly enjoyed the festival and rated it highly.

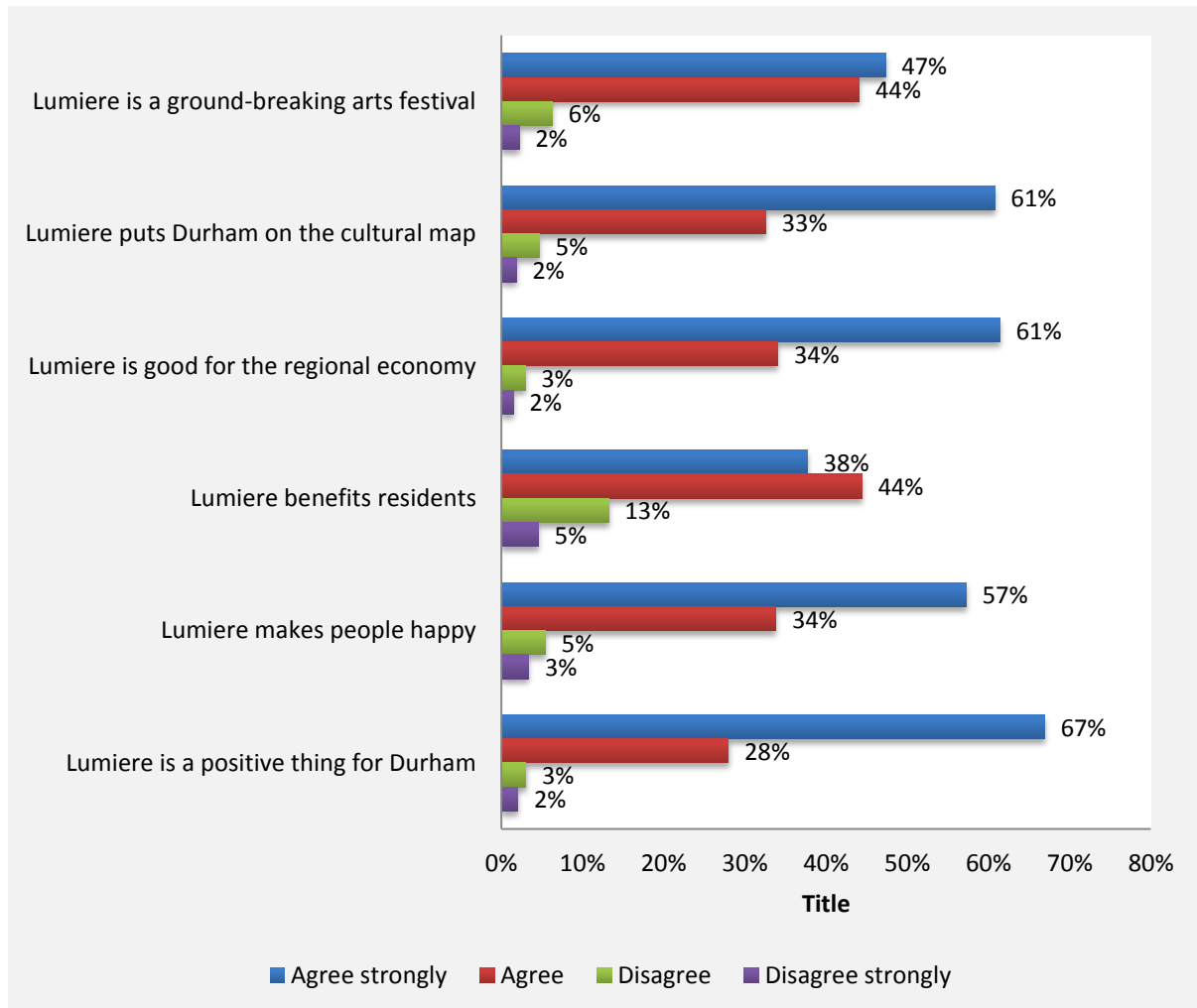
There were no real differences between ratings for 2011 compared to 2009, when respondents gave the festival an overall rating of 8 out of 10. Similar concerns were made at that time about the large numbers of people and how this may have detracted from the experience. However respondents had been, in general, very positive about the 2009 festival.

Figure 8 - How would you rate the following aspects of Lumiere?



Respondents were very positive about the contribution that Lumiere makes to the area. Almost all respondents agreed that Lumiere is a positive thing for Durham (95%), that it is good for the regional economy (95%) and that it puts Durham on the cultural map (94%). Figure 9 shows the results when respondents were asked to what extent they agreed with certain value statements. Respondents were very positive about the event for all statements: 91% also agreed that Lumiere is a ground-breaking festival, 82% agreed that Lumiere benefits residents and 91% agreed that Lumiere makes people happy.

Figure 9 - To what extent do you agree or disagree with the following statements?



A potential area of concern is that nearly 1 in 5 respondents disagreed that Lumiere benefits residents although they may have agreed with the other statements.

In 2009 a similar proportion of respondents stated that the festival makes people happy implying that the Lumiere festival has retained the strong positive social impact that it instilled in the city during the first festival.

3.4. Installations

Figure 10 lists the top ten installations as ranked overall by the respondents of the Lumiere 2011 visitor survey. The top three ranked installations were 'I Love Durham', 'Crown of Light' and 'Spirit' in

that order. However, Crown of Light was ranked the highest by the largest proportion of respondents. These three were the largest installations at the festival and drew the largest crowds, partially as a result of being located right in the heart of Durham City. There are some unexpected high scorers. The installation '60 Second Cathedral' may be ranked higher than it would otherwise have been due to its proximity to and its visibility from the Lumiere Hub. Respondents may also have mistaken it for 'Crown of Light' considering it has the word Cathedral in it.

Figure 10 - Top ten ranked installations

Installation	Score³	Freq. of No.1s
I Love Durham	1145	212
Crown of Light	901	196
Spirit	591	123
60 Second Cathedral	554	128
Splash	514	64
Les Voyageurs	490	77
River of Light	235	29
Rainbow	209	31
Elvet Bridge	138	19
LED's Dance	137	19

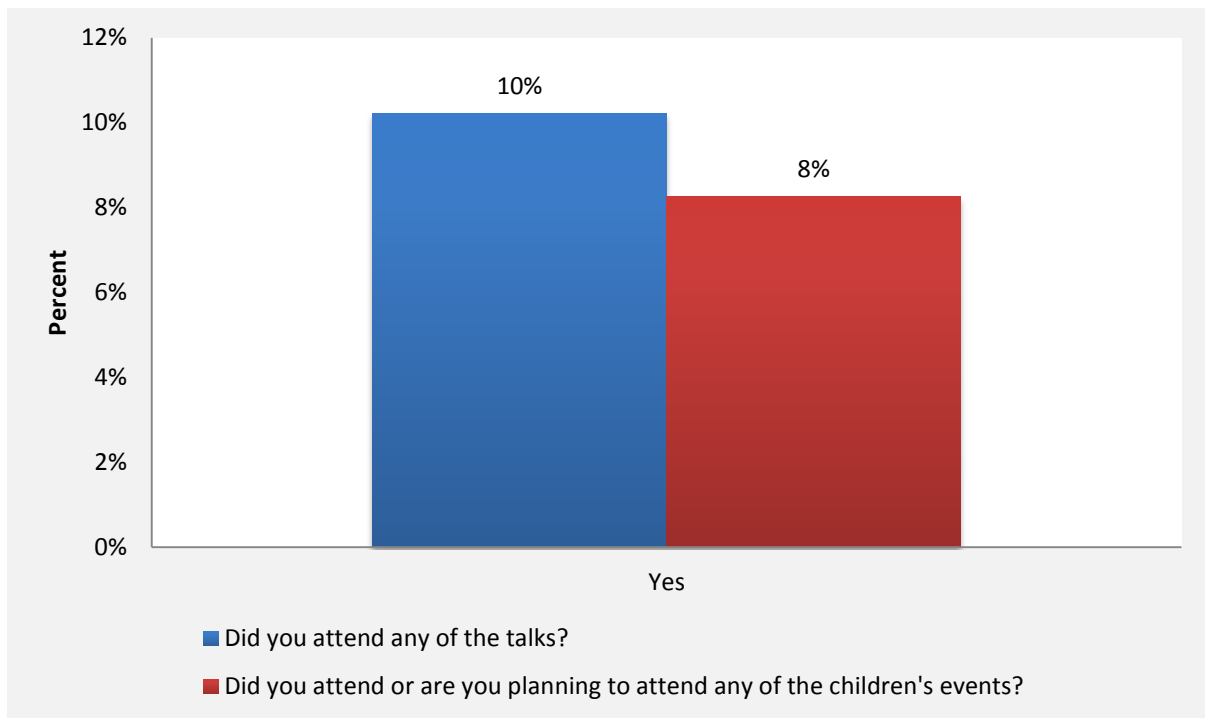
3.5. Talks and children's events

Figure 11 shows the proportion of respondents that attended any of the talks and childrens' events. Ten percent had attended any of the events and 8% had attended any of the childrens' events – although these figures may have been boosted by the location of the survey touch screens adjacent to the information centre. With regard to the talks, some respondents cited that it was interesting to learn some background information on the artworks and others that they were fascinating. However, other respondents were unaware that there the talks were available to them.

With regard to the childrens' events, a number of respondents added that they added a magical feeling to the event, especially the lantern procession.

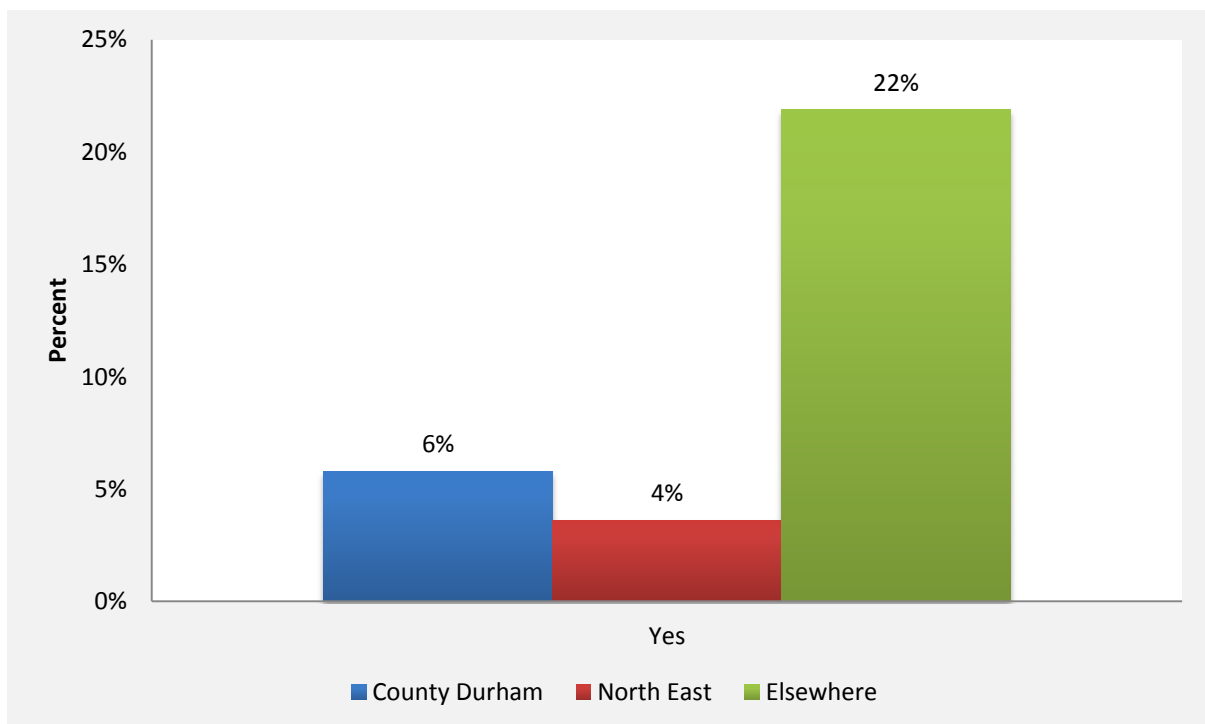
³ Installations scored 3 points if they were ranked first, 2 if they were ranked second and 1 point if they were ranked third.

Figure 11 - Whether respondents had attended any of the talks / childrens events



More than 20% of respondents from outside the region said that they had attended at least one talk, perhaps reflecting the more specialist nature of this audience. Respondents from the North East were less likely to have attended any of the talks although only slightly less likely than those from Durham and people from further away were more likely to have attended than any other group.

Figure 12 - Did you attend or are you planning to attend any of the talks? (By respondent location)



3.6. Visitor location

Figure 13 - UK map showing visitor postcodes



Figure 13 locates where respondents of the survey came from and shows there is a high concentration around Durham and the surrounding area. The concentrated area appears to tail off within a distance of about 50 miles north and south of Durham and 30 miles west. Other respondents visited the festival from various locations around the UK with the exception of a cluster of visitors from London and slightly higher concentrations around more densely populated areas

⁴ This map was produced using Google Fusion Tables.

such as along commuter routes. Respondents with postcodes outside Durham were more likely to be ‘fans of Artichoke’s work’ and thus more likely to travel longer distances to visit Lumiere. Forty-four percent of respondents lived in County Durham, 35% were from the North East of England (excluding Durham) and 21% were from further afield⁵. Twenty-one percent of respondents came from Durham City Centre (DH1). In 2009, fewer visitors came from beyond the NE Region (17% compared to 21% in 2011).

Table 1 - Proportions of visitors from different areas of the UK

<i>% of UK visitors from Durham City Centre</i>	21%
<i>% of UK visitors from County Durham (excluding the city)</i>	23%
<i>% from the North East of England (ex C. Durham)</i>	35%
<i>% from rest of UK</i>	21%

Figure 14 shows where visitors come from but on a larger scale. This map clearly shows the concentration of respondents from Durham and the surrounding areas. Other areas of high concentration are evident along commuter routes and busy roads such as the A1(M).

In summary, it appears that the Lumiere festival has a national scope, but attracting visitors predominantly from the North East of England. Respondents also came from other densely populated areas such as London where respondents are more likely to be fans of Artichoke’s work. Lumiere 2011 has a distinctly wider audience than 2009, where a higher proportion of respondents came from further afield.

⁵ Overseas respondents were not asked for their postcode so these figures are related to the UK sample only.

Figure 14 - NE Map showing visitor postcodes

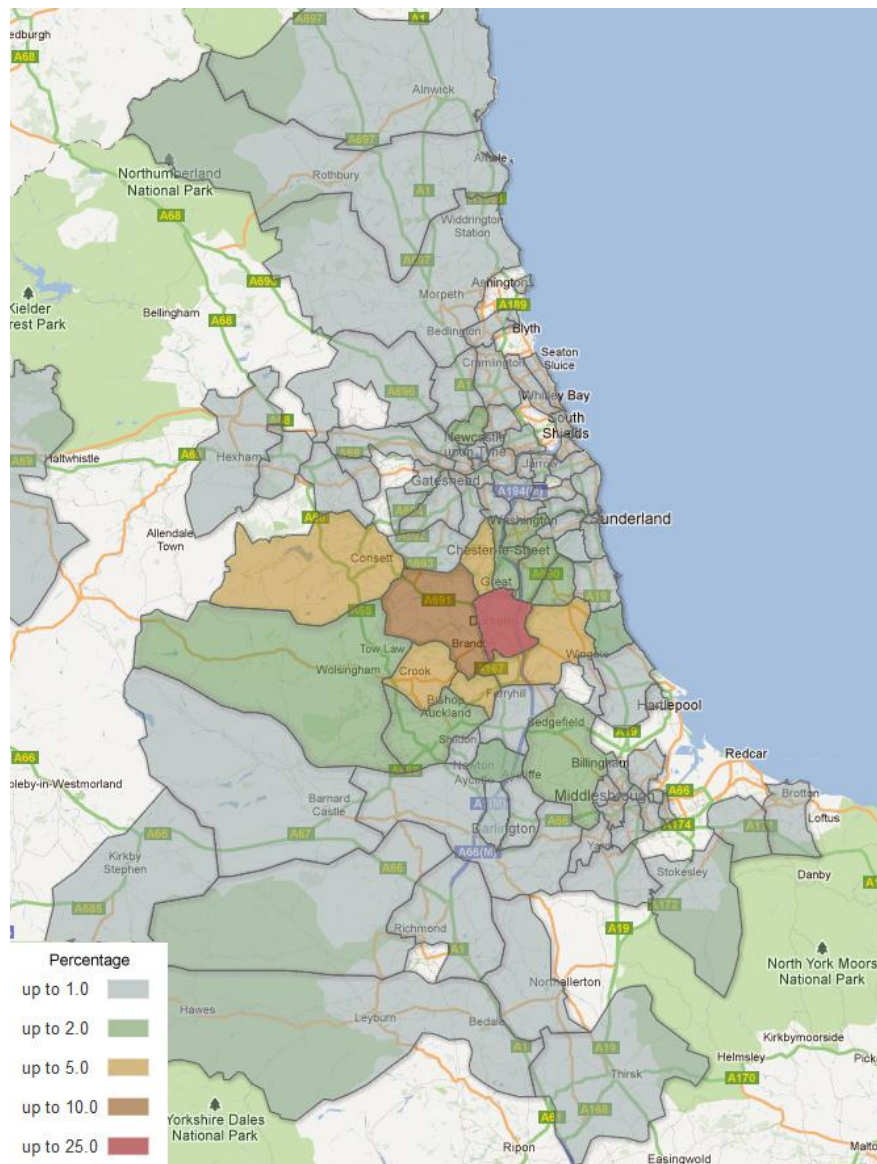
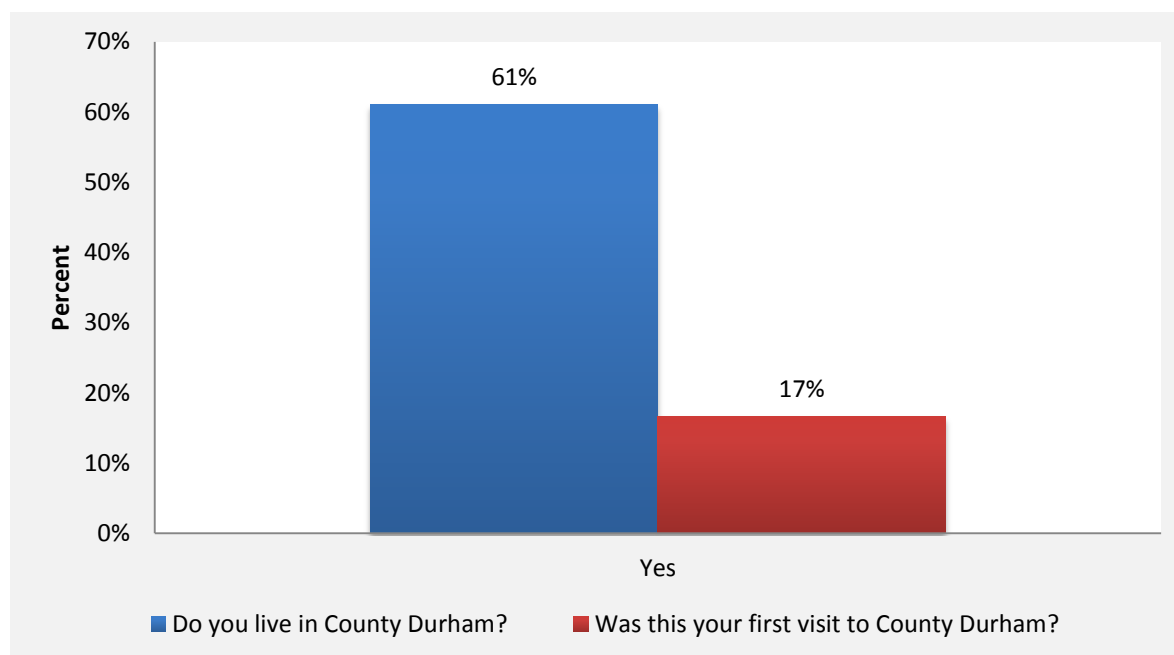


Figure 15 supports the observations on the above maps that the majority of people visit the festival from the North East and in particular, County Durham. However, nearly one in five respondents had never visited Durham before their visit to Lumiere and in this respect, Lumiere showcased Durham to thousands of people.

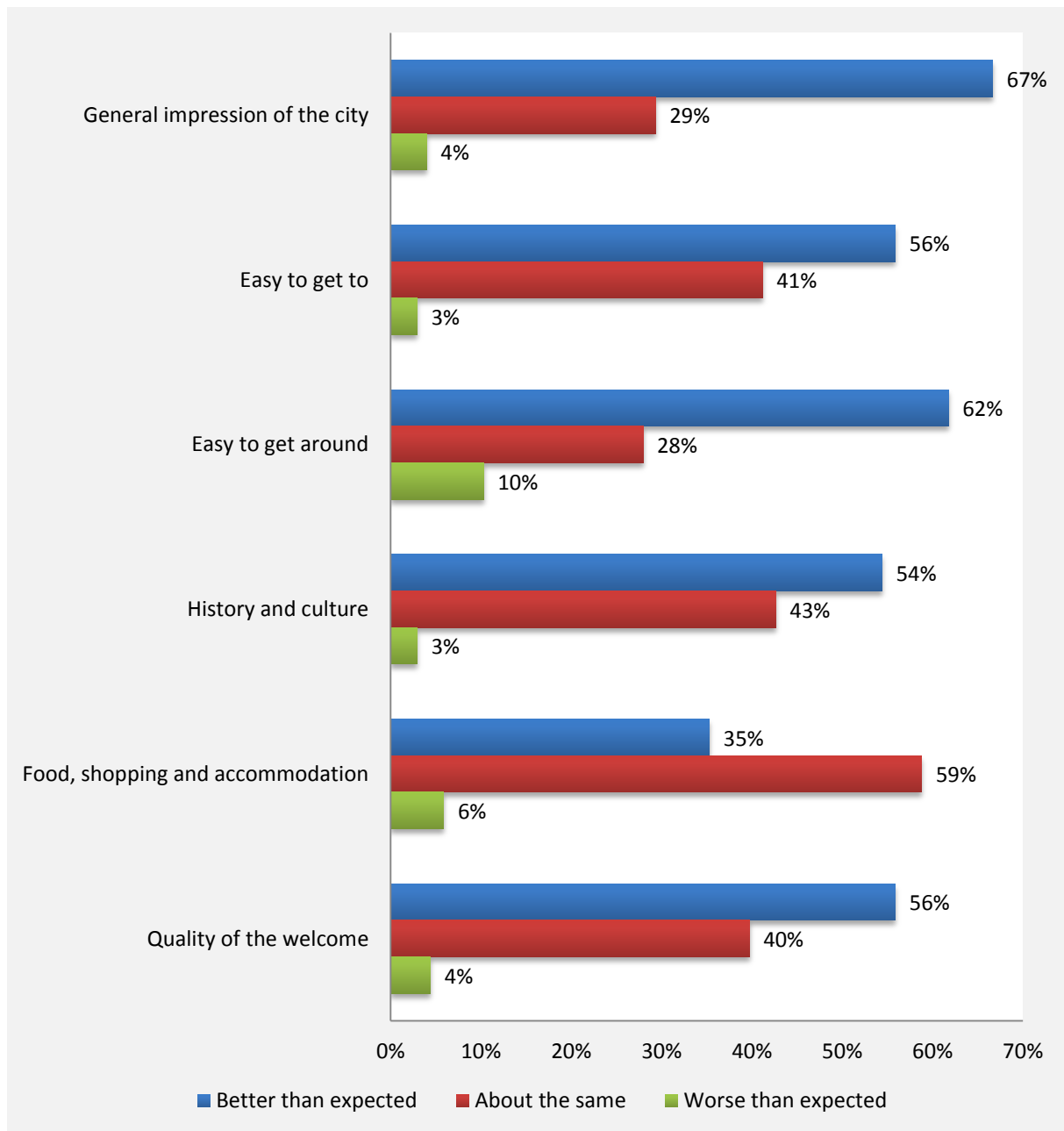
Figure 15 - Whether respondents lived in Durham / had visited Durham before

3.7. Expectations of Durham

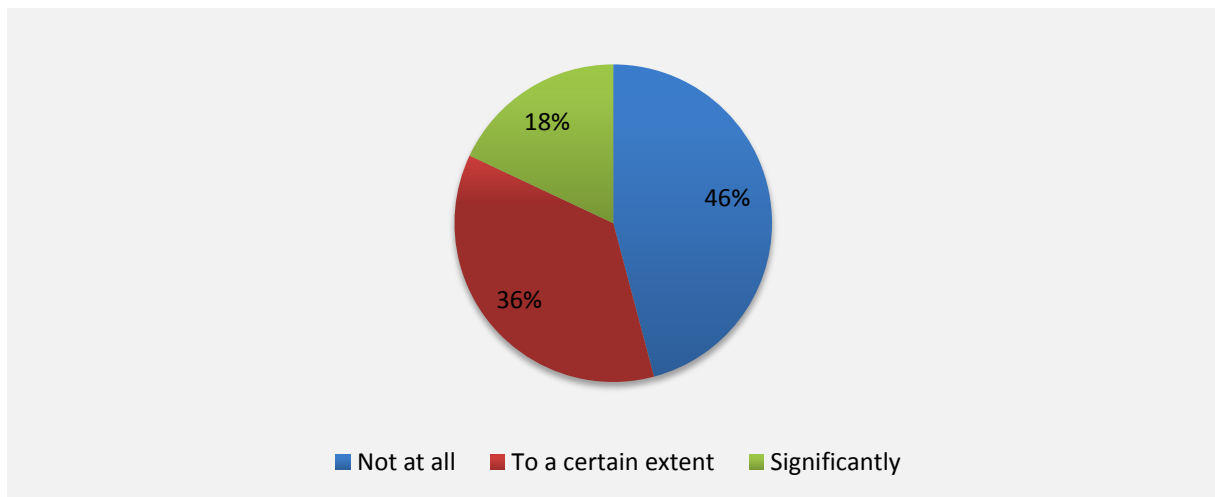
Those who had not visited Durham before were asked whether their experience of visiting the Lumiere festival had contrasted with their expectations of Durham. In all aspects (with the exception of 'Food, Shopping and Accommodation'), respondents' expectations were surpassed by their experience of Durham as a result of their visit. Two thirds of visitors stated that their general impression of the city was better than expected following their visit to Lumiere festival. More than half found the city easy to get to and over 60% found that it was easy to get around. However, one in ten respondents did find the city harder to navigate than they had expected.

Respondents who were either disabled themselves or who had a disabled person with them were less likely to be positive about accessibility around the city. Twenty-four percent of respondents with a disability or with someone with a disability found the accessibility good or very good compared to 29% of people without. Similarly 33% of respondents without a disability found the accessibility poor compared to 46% of those with.

Figure 16 - How did your experience of Durham compare with your expectations before your visit?



Respondents that had visited Durham before, including those who live in the city, were asked whether their perception of Durham had changed as a result of the festival. 20% of people stated that the festival had significantly changed their perceptions of Durham and over 33% cited that it had, at least to a certain extent, changed their perception of the city. However, 46% of respondents, who were more likely to be residents of the county, felt that the festival had not changed their perception of Durham.

Figure 17 - Did your visit to Lumiere change your perception of Durham?

3.8. Visit specifics

Broadly half of the sample audience travelled to the event by car or motorcycle with a further quarter travelling by train, bus or coach. Twenty percent of the sample audience travelled to the event on foot which given the large numbers of people who attended is positive from a carbon footprint perspective. Durham residents were much more likely to travel to the festival by foot, with 35% of these respondents choosing to walk compared to 16% of people from outside the region. 40,000 additional tickets were sold for the Durham Park & Ride service during the event.

Figure 18 - How did you travel to the festival?

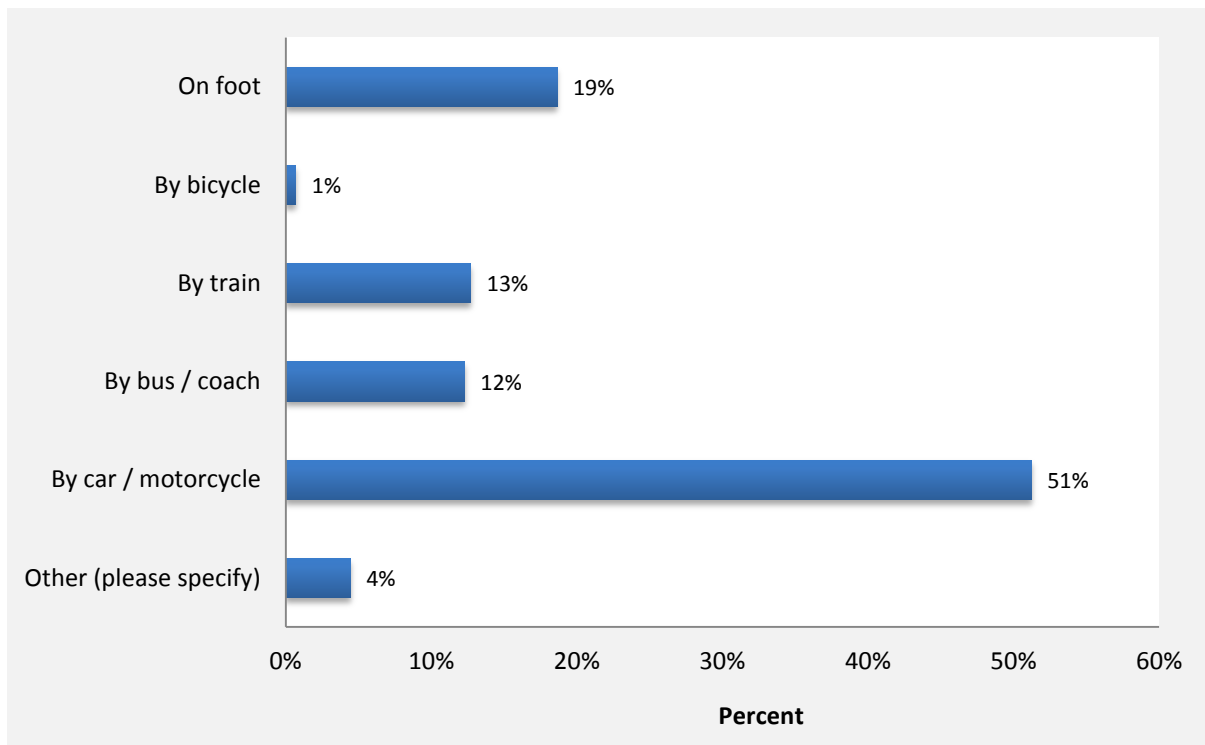
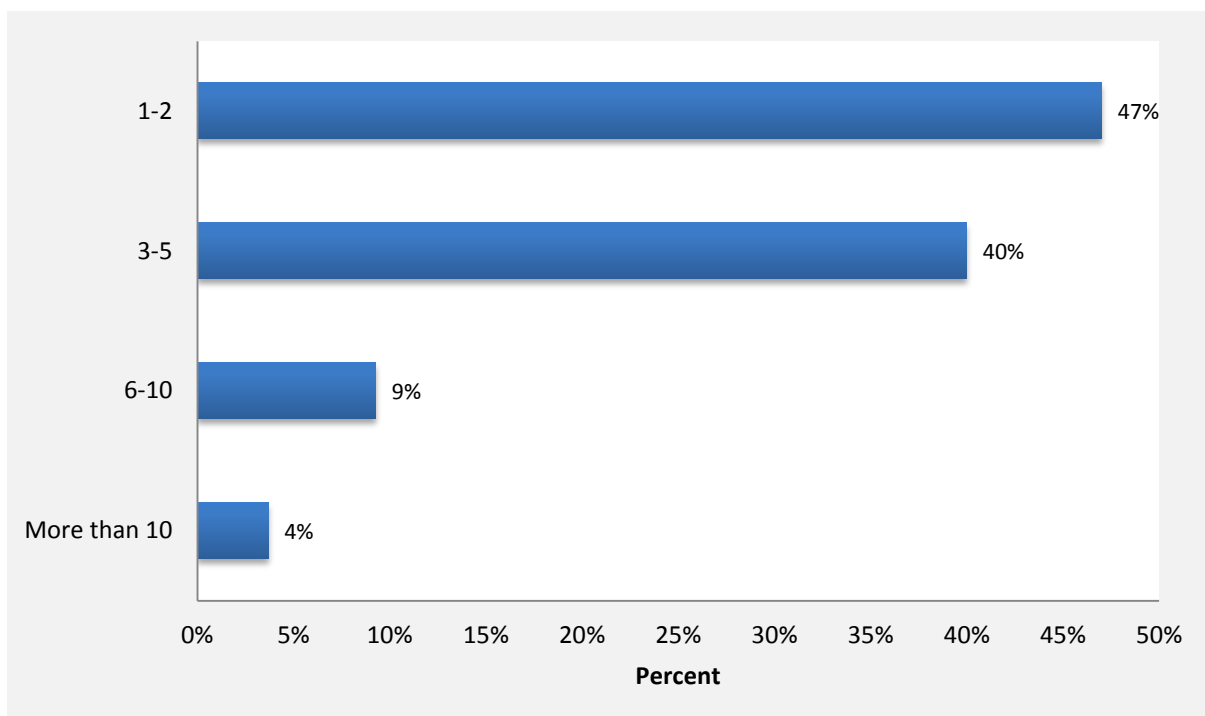
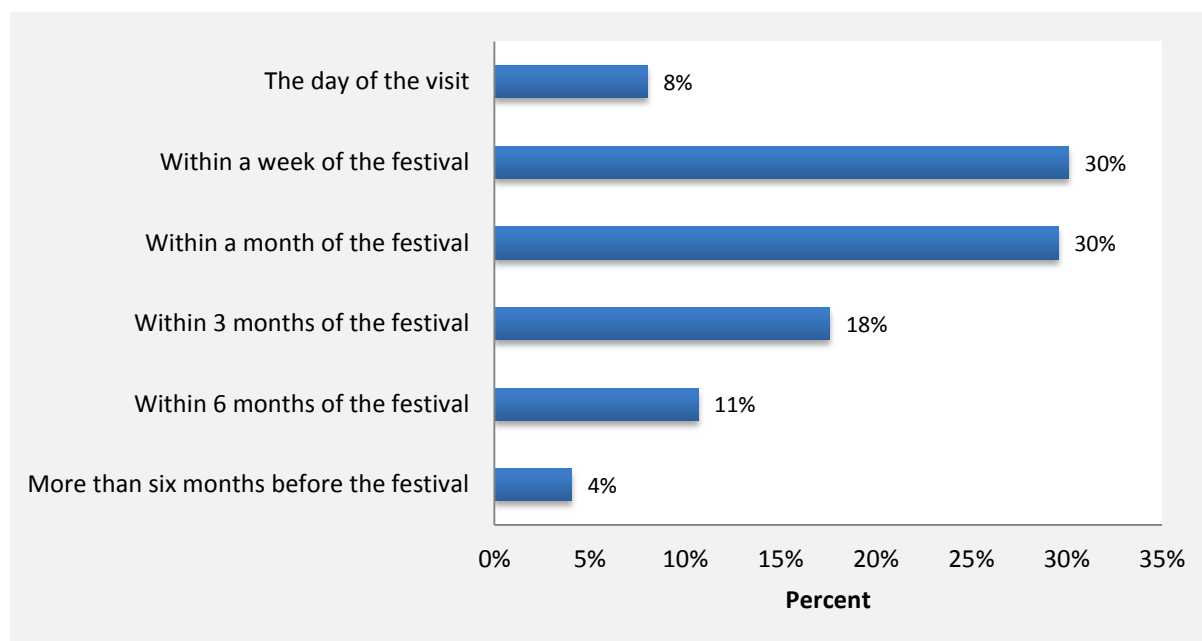


Figure 19 - How many were in your group?



Respondents were most likely to have attended either alone or with one other person (47% of the sample). However, a further 40% were in a group of 3-5 people and 13% visited the event as part of a larger group.

Figure 20 - How far in advance did you plan your trip?



When asked how long they had been anticipating making their trip to the Lumiere festival, respondents were most likely to have planned within the month preceding the event, with 30% deciding the week before. Just under a tenth reported that they had decided to attend on the day of the festival. However, 33% of those taking part in the survey had planned their trip more than one month ahead. This contrasts with the sample in 2009, 13% of which decided to go to the festival on the day of their visit - suggesting that people are now planning to visit the festival at an earlier stage. Those travelling further were more likely to plan ahead: 30% of respondents from outside the North East region had planned their trip between one and three months ahead of the festival, compared to 12% for Durham residents and 15% of residents of the North East.

Figure 21 - How much did you spend overall per person during your trip to the festival?

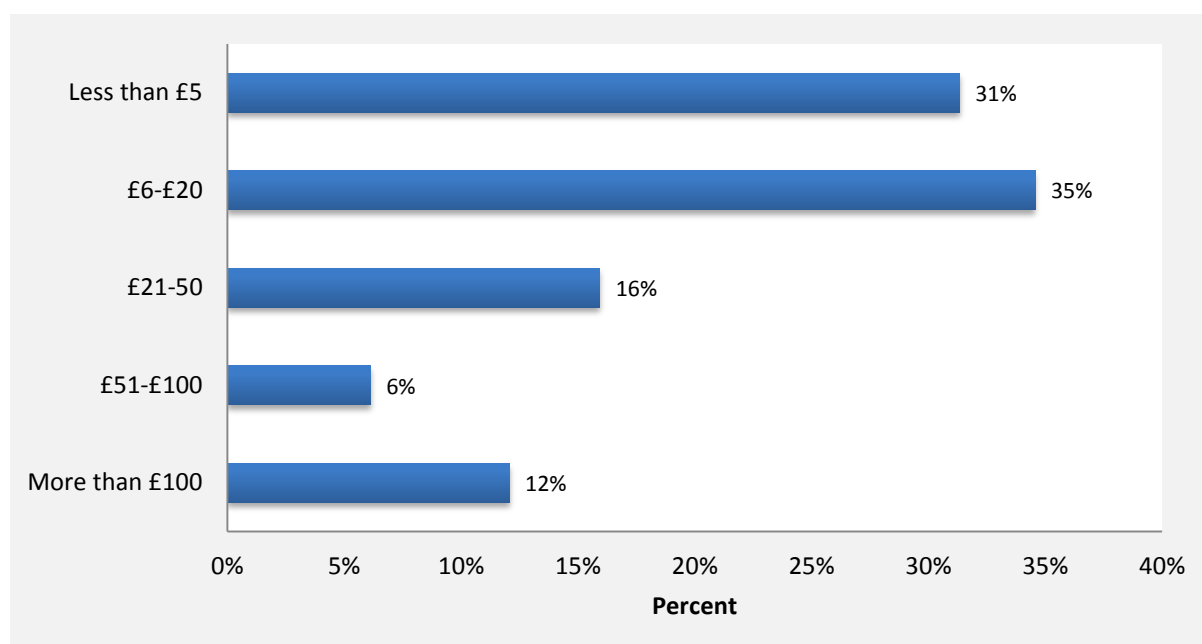
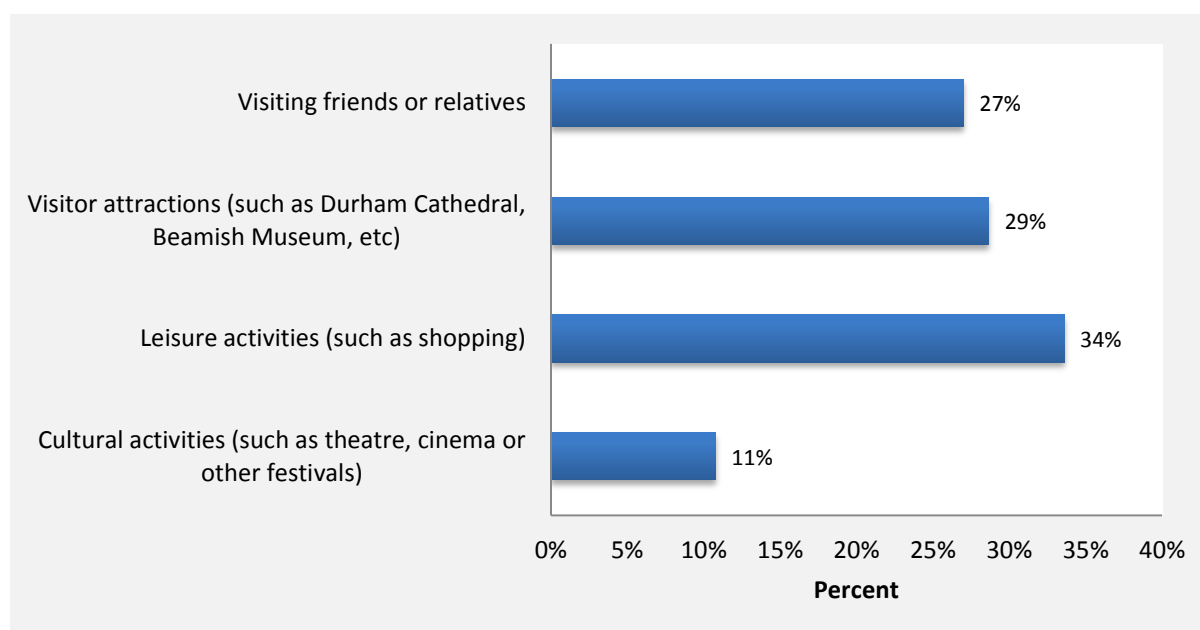


Figure 21 gives an indication of how much money visitors of the Lumiere festival spent during their visit. 66% stated that they spent up to £20 per person and just under 50% of those spent less than £5. The proportions of respondents spending in the higher categories tails off albeit with the exception of the 'More than £100' category. Presumably, these respondents are either high spenders in general, or that they include visitors from outside day-travelling distance who spent on accommodation and food. Using the upper and lower boundaries of the categories, an upper and lower estimate of average spend per person can be calculated. The average spend per person at the Lumiere festival was between £35.62 (upper spend bracket) and £20.60 (lower spend bracket). The midpoint spend was £27.61, slightly more than the £26 average spend recorded in 2009.

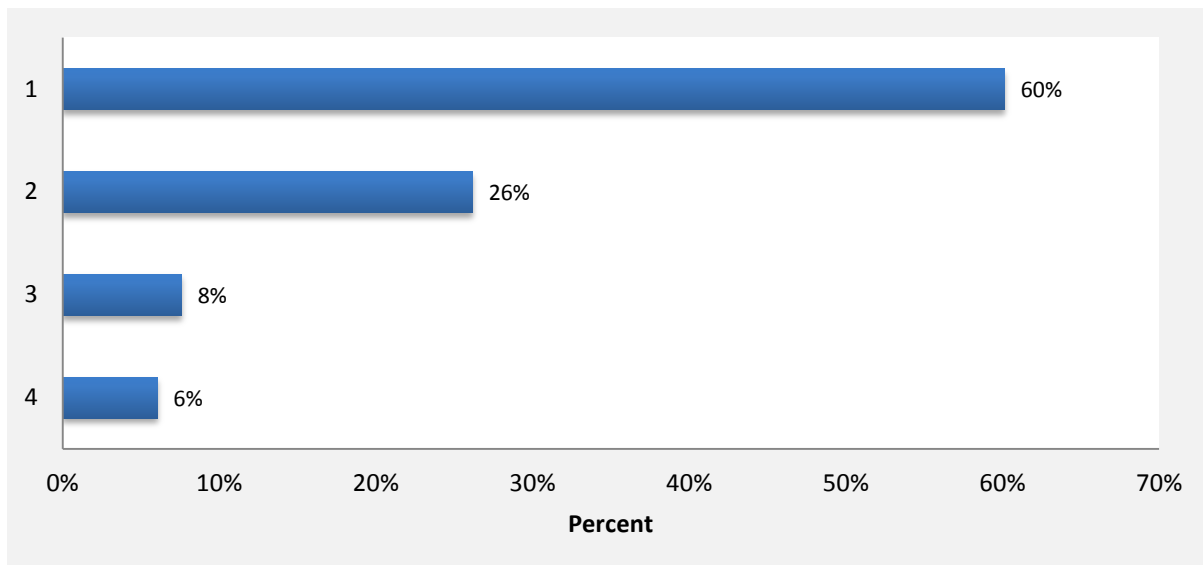
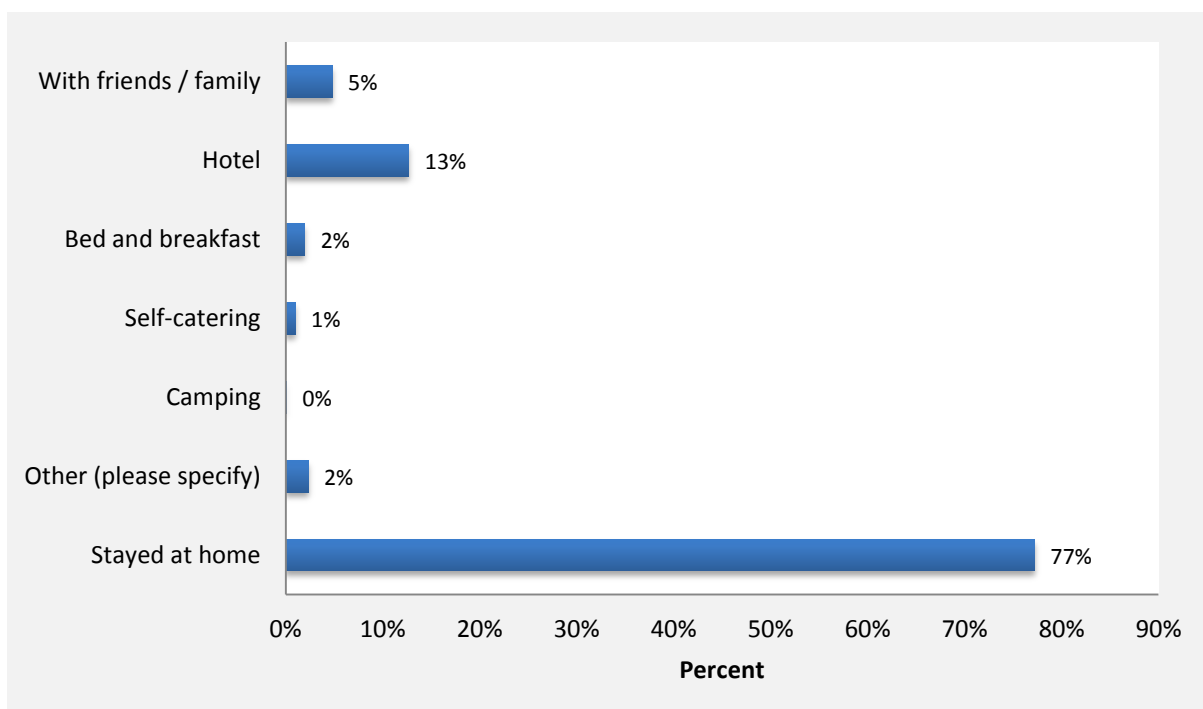
Many respondents of the survey conducted other activities whilst visiting Lumiere festival. The most popular was 'Leisure Activities, such as shopping' with more than 33% of respondents citing that they did this. Approximately 30% of respondents visited tourist attractions such as the Cathedral and Beamish Museum and more than 25% visited friends and relatives. Fewer people took part in cultural activities such as theatre, cinema or other festivals, presumably because they were already at a cultural event and felt little need to attend another one.

Figure 22 - Did you include any of the following in your visit to Lumiere?



3.9. Stay

The majority of participants attended Lumiere for one night only, although a quarter of the sample outlined they had visited the festival over two evenings. Nearly a tenth of respondents attended for three evenings with the remaining participants visiting the event over each of its four nights.

Figure 23 - How many evenings were you at Lumiere?**Figure 24 - If you were visiting the area, where did you stay?**

Sixty-eight percent of the total sample audience lived within travelling distance and therefore did not plan to stay in local accommodation. Of those who were visiting the area, almost a fifth of participants stayed in a local hotels. The second most popular response was with friends and family, and the remaining respondents stayed in self catering or bed and breakfast style accommodation.

respondent commented *“forget the ‘nay’ sayers...big up the Durham crowds”*. Other stated that the crowd control was good although the information directing the crowds could have been improved.

The negative comments regarding the number of people and the crowds included sentiments such as *“poor crowd control”* and *“better crowd control needed in the future”*. It is understood that festival staff put crowd management measures in place once the problem had been acknowledged and that even prior to this, maps were available which offered suggestions for routes to take during busy periods. Many of the comments relating to time were concerned with visitors feeling that the festival could have started earlier in the evening, which was echoed by the sentiments from some businesses in the town (see business survey findings). Others felt that they did not have enough time to see what they wanted because of the amount of time they spent in crowds, or navigating the one way system. A suggestion was offered that activities could have started earlier on the Palace Green and Cathedral, for example 6pm for families and the disabled to allow them more time and space, with the wider public coming from 6.30pm onwards.

Despite these negative comments, the majority were overwhelmingly positive, with many people saying that they thought the festival was *“fantastic”, “brilliant”, “amazing”* or *“wonderful”*. For example, one commentator said that *“it is without doubt a wonderful event. it was a great success, culturally, psychologically, socially, and economically.”* Another suggested that it was *“a fantastic night out for everyone”*. Other people stated that it was a great and healthy way to meet people and socialise and that they wanted the festival back every year.

Many respondents offered suggestion for improvements they would like to see in the future. For example one respondent thought there was potential to use the twitter hashtag #lumieredurham more effectively. Another requested the botanic gardens display to be repeated as a way of alleviating crowd management issues. The same commentator also suggested that the one way system plans should have been advertised in advance to give people time to plan and that shortcuts could be added to prevent people from having to walk the full route several times.

3.11. Audience profile

The audience profile of respondents of the Lumiere visitor survey shows a slight age bias towards the older end of the spectrum. The 45-64 age group contained the largest proportion of respondents (37%) followed by the 26-44 age group (31%). Combined, these groups comprised more than two thirds of the sample. The upper and lower age categories of '65 or over' and '16 and under' each accounted for 9% of the sample. 8% of the online sample were under 25, as opposed to 23% overall – implying that the web survey attracts an older audience.

Figure 27 - Age of respondents

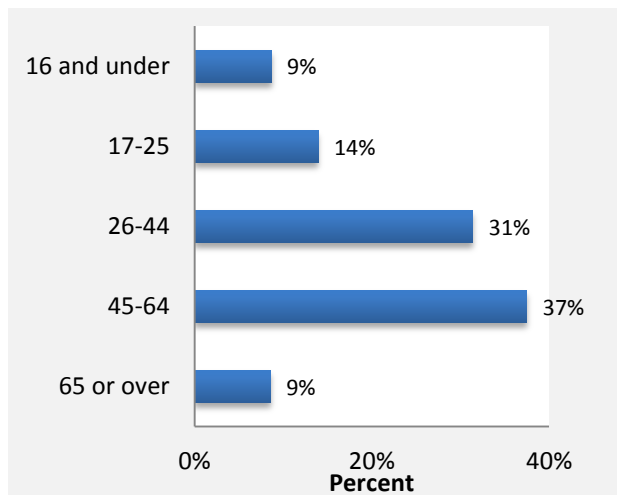


Figure 28 – Whether respondent considers themselves, or any member of their group, to have a disability

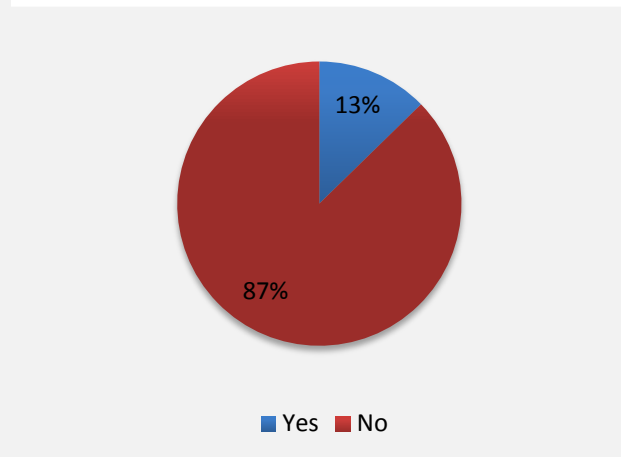


Figure 29 - Unemployed Status

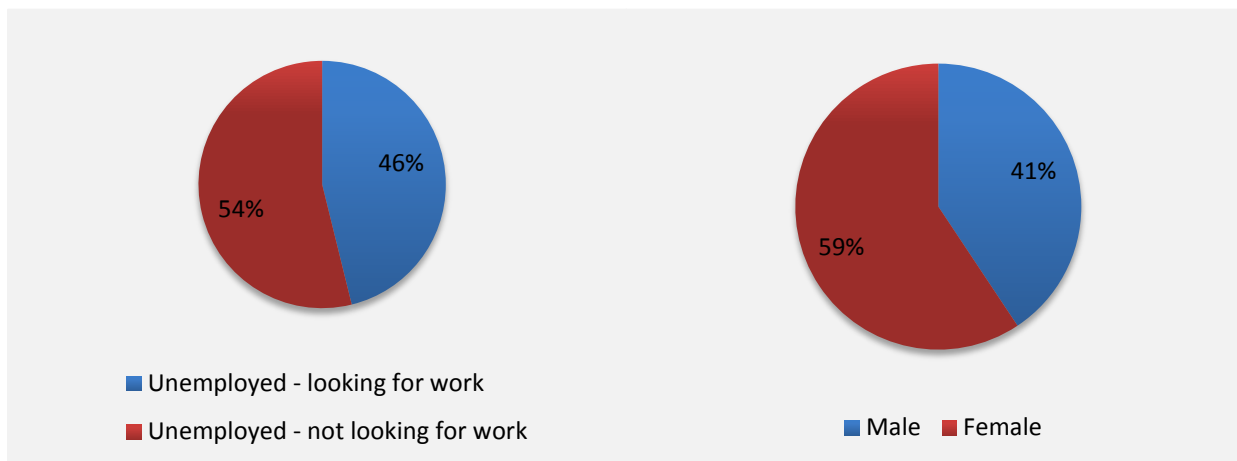
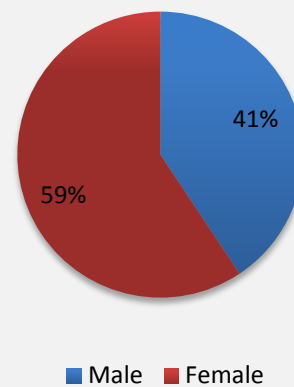


Figure 30 - Sex of respondents



Other key characteristics of the respondent profile were that:

- 13% of respondents considered either themselves or a member of their group to be disabled;
- 3% of the sample group were overseas visitors compared to 2% in 2009, representing a significant rise in international visitors;
- There was a significant increase in respondents in the under 25 category compared to 2009; and,
- 59% of respondents were female and 41% male.

These statistics should be taken as an indication of the Lumiere audience profile only as there may be some bias in the likelihood of certain groups to take the survey. For example, overseas visitors may be less likely to undertake the survey for fear of misunderstanding the questions and as such, the group may be under-represented in the sample. This said, undertaking surveys provides the most accurate way of understanding the audience profile of an event, short of extracting details from *all* visitors through means such as a ticketing system.

The below graph identifies the age profile of respondents by where they lived. Respondents who had travelled from outside the North East to attend the festival had a stronger bias towards the 45-64 age category and fewer 26-44 year olds. Each other category was relatively evenly spread.

Figure 31 - Age profile by resident location

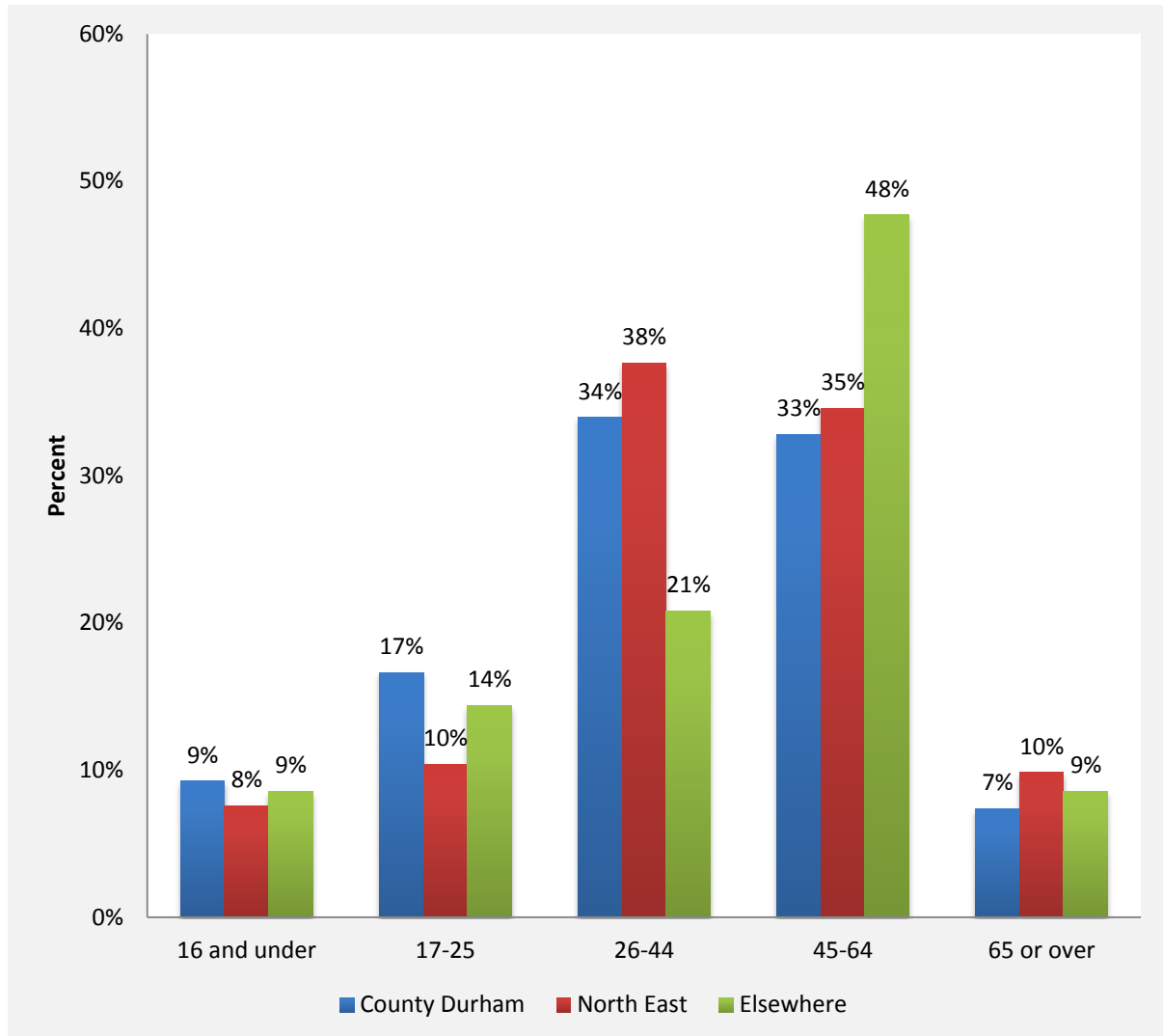
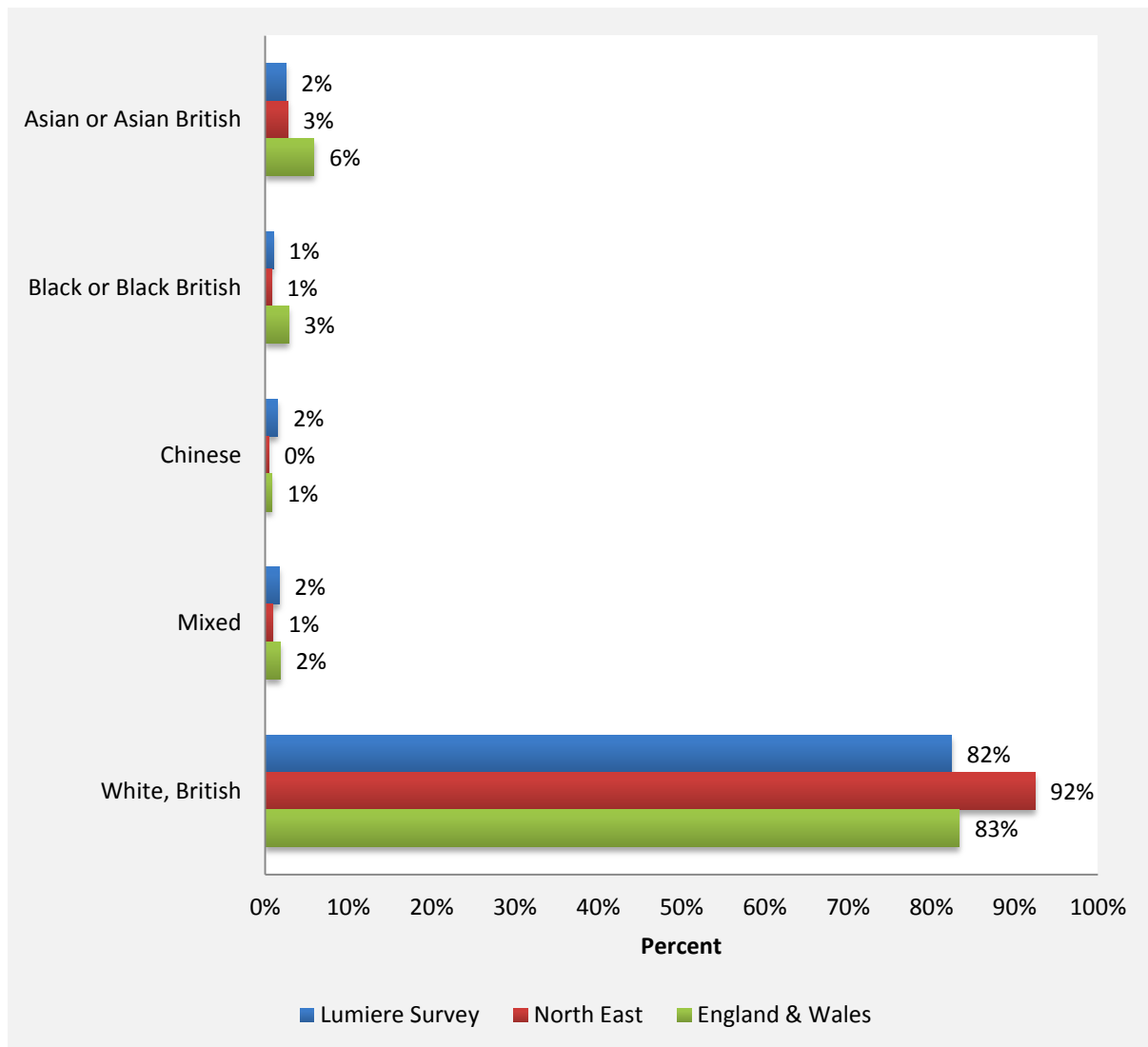
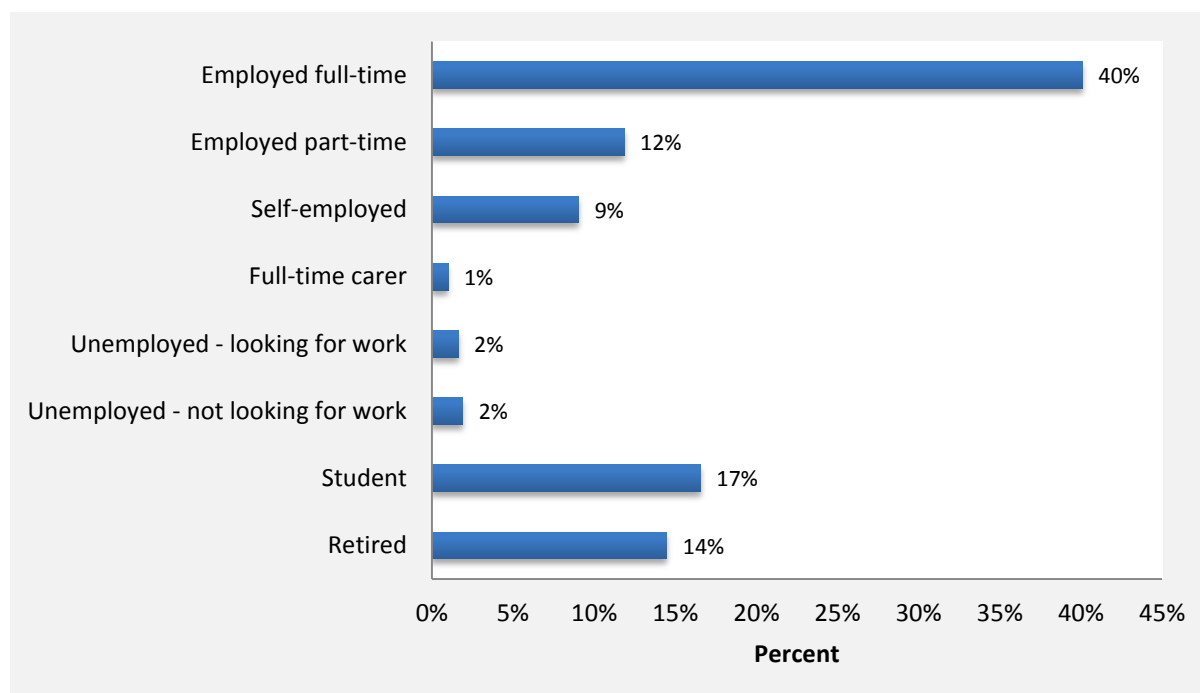


Figure 32 shows the respondent profile by ethnic origin. The great majority of respondents were White British (82%), followed by Other White Background (6%). The rest of the sample comprised seven other ethnic groups including Indian, Pakistani, Chinese and Mixed Race. The graph shows that Lumiere survey proportion of Asian or Asian British respondents matches the regional profile but the survey proportion (82%) of White British matches the national profile (83%). There is little difference between figures for the other categories.

Figure 32 – How would you describe your ethnicity?



The graph below identifies the employment status of survey respondents and shows that 61% were in employment at the time of the survey, whether it be full-time, part-time or self-employed. Approximately a third of the sample were either studying, retired or caring full-time. The remainder of the sample declared themselves either unemployed and looking for work, or unemployed but not currently looking for work. According to the Office of National Statistics, unemployment in the North East of England is currently at 11.6%, measured as a proportion of the economically active population. The Lumiere survey measured unemployment as a proportion of the population as a whole (as anyone could complete the survey) hence the two figures cannot be compared like-for-like. Despite this, however, the proportion of unemployed people completing the survey was below what might have been expected and this may have been reflected in the overall audience profile.

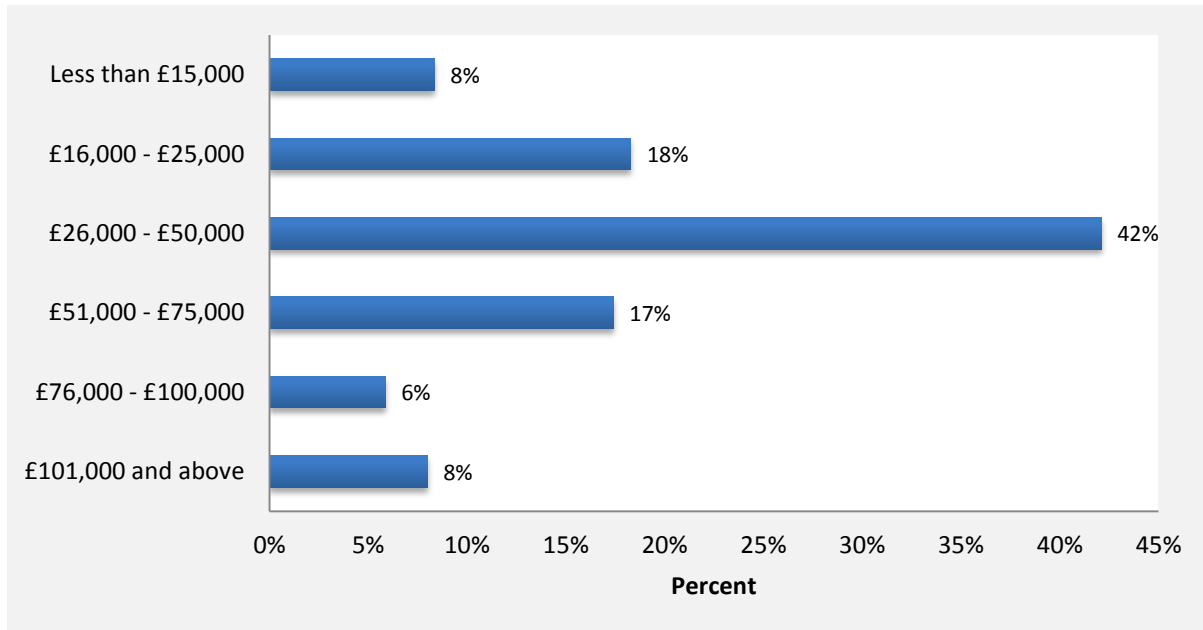
Figure 33 - How would you describe your employment status?

Those that specified that they were working were asked what job they had, what job category⁶ it came under and what their household income was. Respondents' job titles are shown in Figure 34 below. Respondents were most likely to describe themselves as either teachers or managers, an observation that is supported by Figure 35 which indicates that respondents were most likely to select 'managerial and lower professional occupations e.g. managers and teachers etc.' when asked which job category best described their current job. Other popular job titles contained the words 'consultant', 'assistant', 'officer', 'sales', 'artist' and 'engineer'. It is worth noting that the great majority of visitors to the Lumiere festival are not regular arts attenders implying that the festival attract a wide range of visitors from different professional and cultural backgrounds.

⁶ Based upon National Statistics Socio-Economic Classifications.

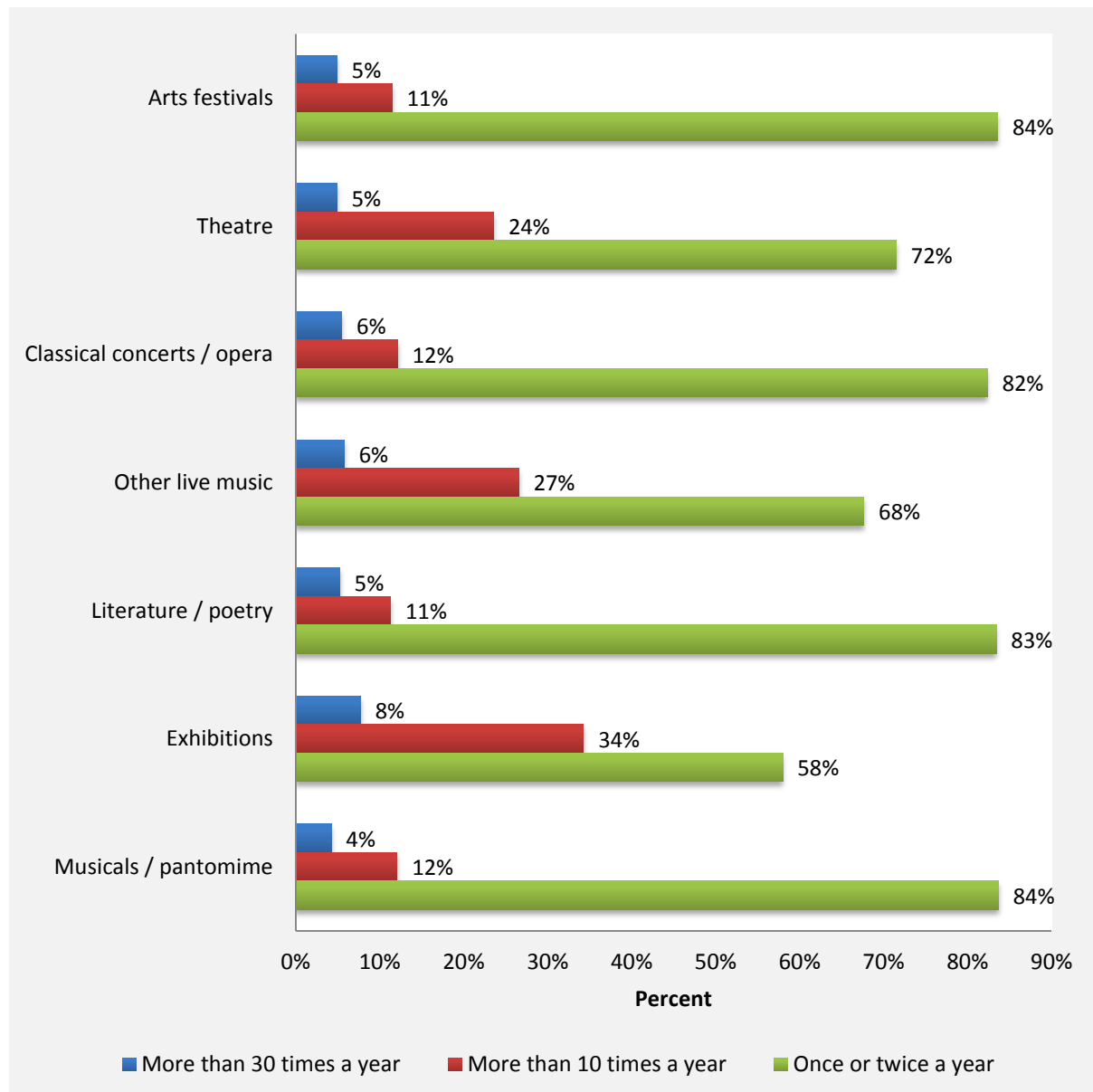
Figure 36 below shows the profile of household income of the sample. Only those that stated that they had a job were asked this question. The results show a bell-curve with a peak in the £26,000 - £50,000 income range.

Figure 36 - Which of the following best describes your household income?



All respondents were asked how frequently they attended a variety of different arts events. Respondents were most likely to attend events only once or twice a year, although they were more likely to attend exhibitions, live music and theatre more frequently. A third of the sample said that they attended exhibitions more than ten times per year.

Figure 37 - How often do you attend the following events?



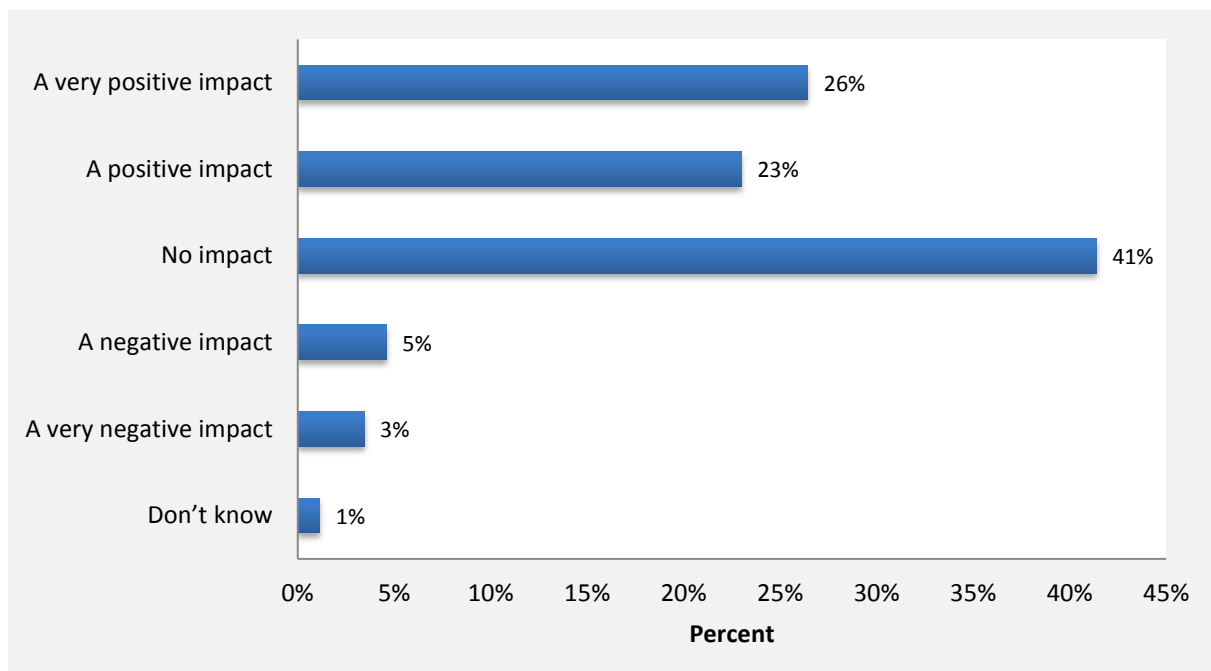
4. The View of Business

The business survey was divided into three parts: city centre retail and service businesses, accommodation businesses from across Durham and its hinterland and tourist attractions from the area. The survey results have been combined where possible, to provide a more robust quantitative sample.

4.1. Impact on business

Fifty-percent of all respondents felt that Lumiere had a positive impact on their business and 26% felt that it had been a very positive impact, a significant improvement on 2009 where only 18% of businesses felt that way. 8% said that the event had had a negative impact on their business compared to about 6% in 2009.

Figure 38 - What impact did the recent Lumiere festival have on your business in general? (All Businesses)



Twenty-five percent of surveyed businesses stated that their sales were up on the week previous to the festival; 50% of them stating they were up significantly. In comparison, 8% of businesses reported fewer sales during Lumiere week than the week before. An even higher proportion of businesses mentioned their sales were up on the same period in October and close to 50% of the surveyed businesses cited their sales were up on the same period last year.

The halo effect, where shoppers continue to spend more in the period following the event in question, is evident in the case of Lumiere festival, with a quarter of businesses reporting higher sales in the week following Lumiere.

Figure 39 - Approximately how did sales during the Lumiere festival compare with:

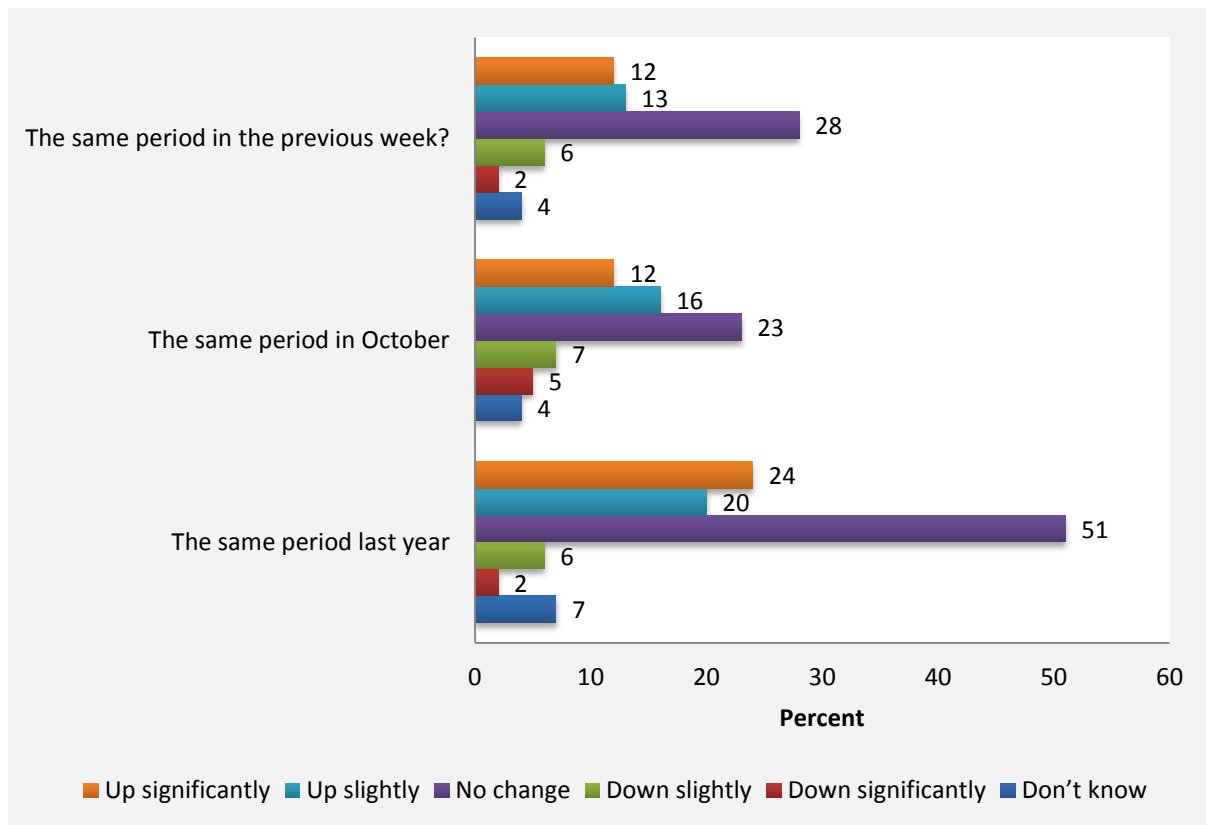
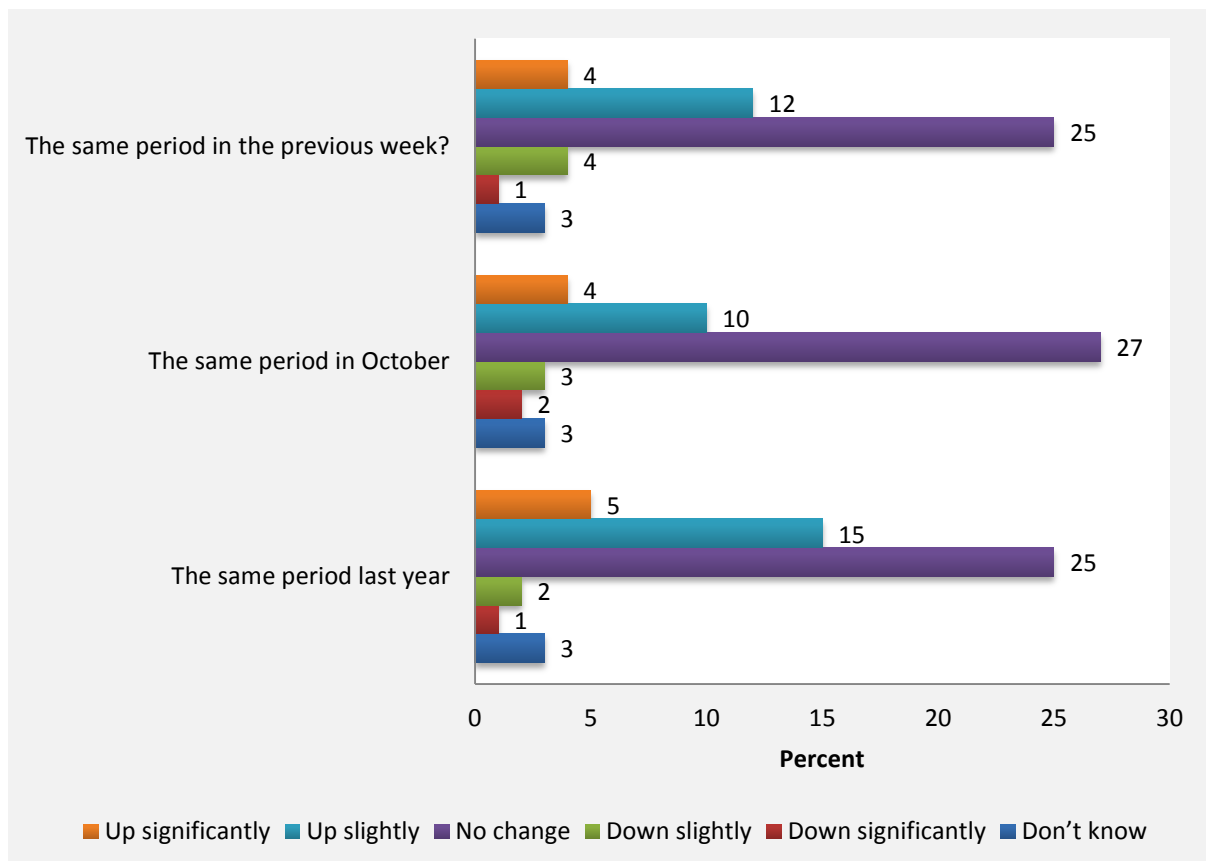
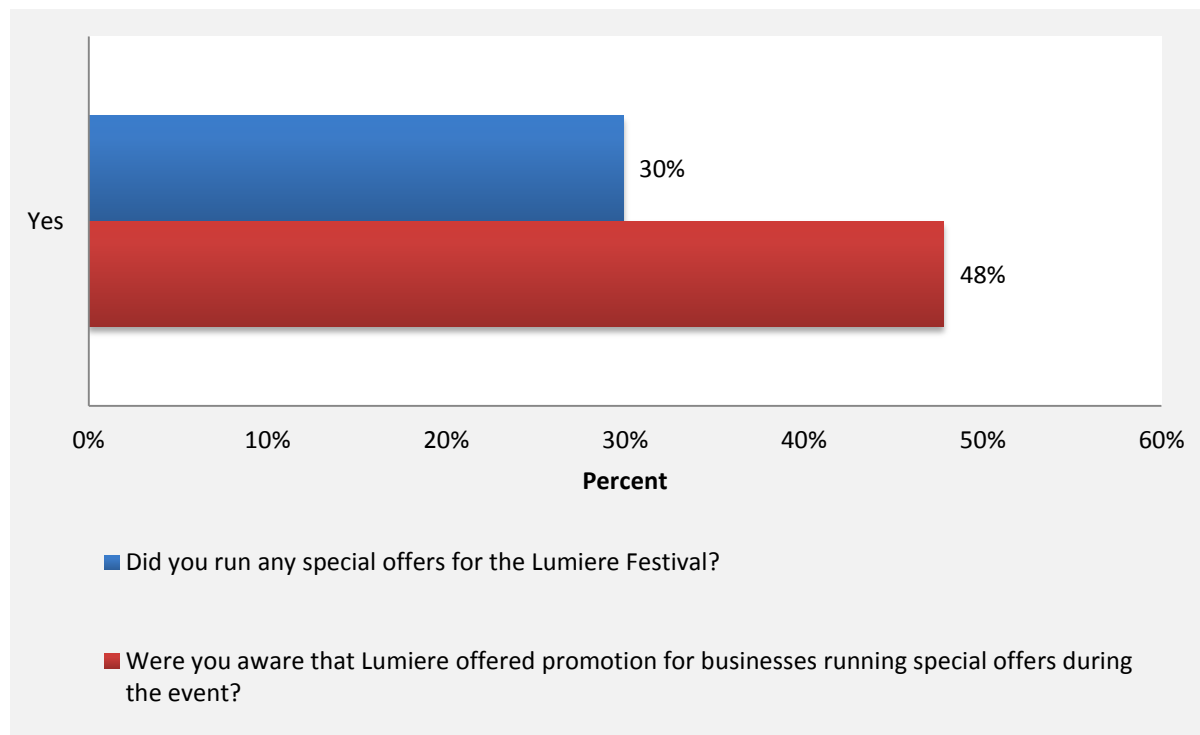


Figure 40 - Approximately how did sales the week after the Lumiere festival compare with:



Approximately 33% of businesses ran special offers to coincide with the Lumiere festival and 50% were aware that Lumiere offered promotion for businesses. In the case of tourist attractions special offers were likely to be of the 'buy-one-get-one-free' variety.

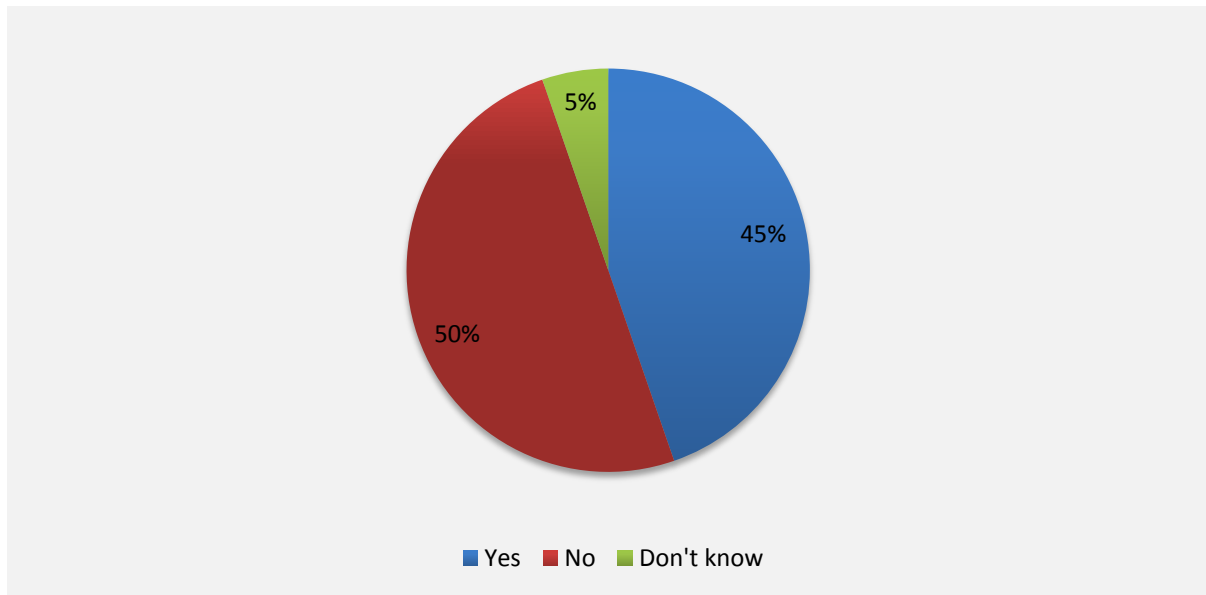
Figure 41 - Did you run any special offers for the Lumiere festival?



Approximately 33% of attractions surveyed thought that they had received additional visits from people who had come to the area because of Lumiere. These were felt to include guests from overseas and elsewhere in the UK, as well as the NE Region.

Figure 42 shows that 45% of surveyed accommodation providers cited that they were hosting guests that came specifically for Lumiere.

Figure 42 - Did you host guests visiting specifically to attend the Lumiere festival?



4.2. Trading hours and staff

43% of city centre businesses responding to the survey had tried opening for some additional hours during the event, ranging from an extra hour to an extra 4.5 hours each day. The equivalent figure for the 2009 festival was 14% suggesting that businesses were more aware of the potential for greater additional sales this year. Some 20% of these tried opening late on at least one evening, but found it was not worthwhile doing so. 33% of retailers surveyed thought that they would consider opening longer hours during future events. Figure 44 shows that nearly thirty-percent of those surveyed had taken on additional staff during the Lumiere Festival, compared to approximately 25% in 2009.

Figure 43 - How many extra hours were you open each day?

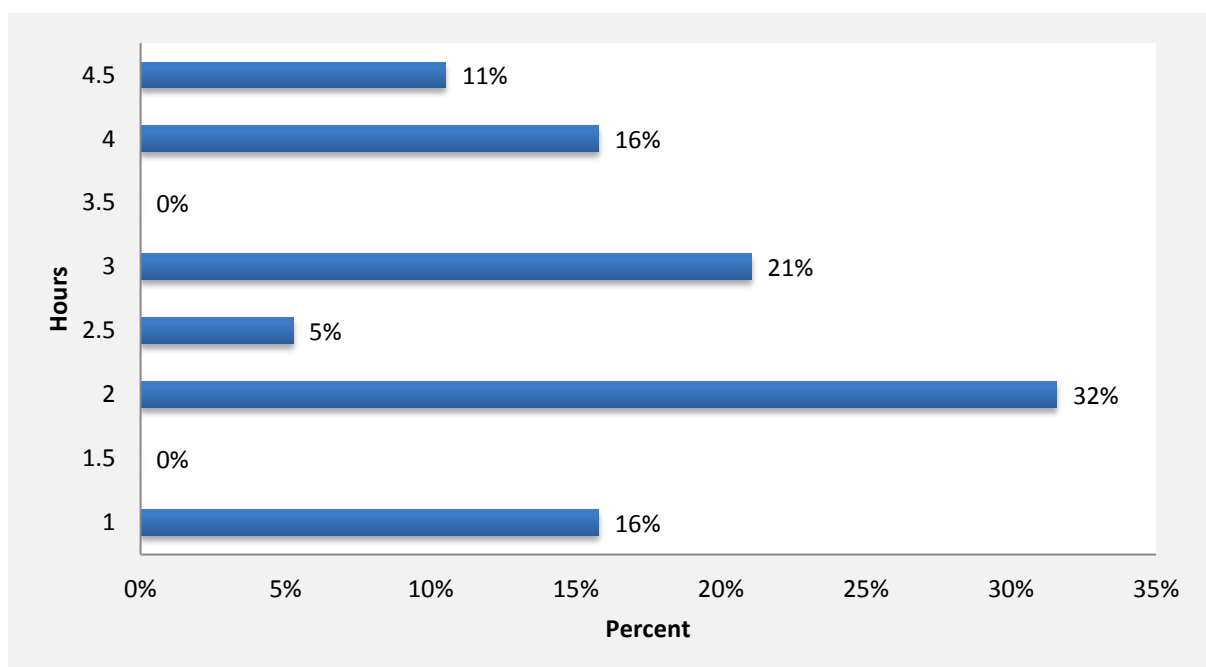
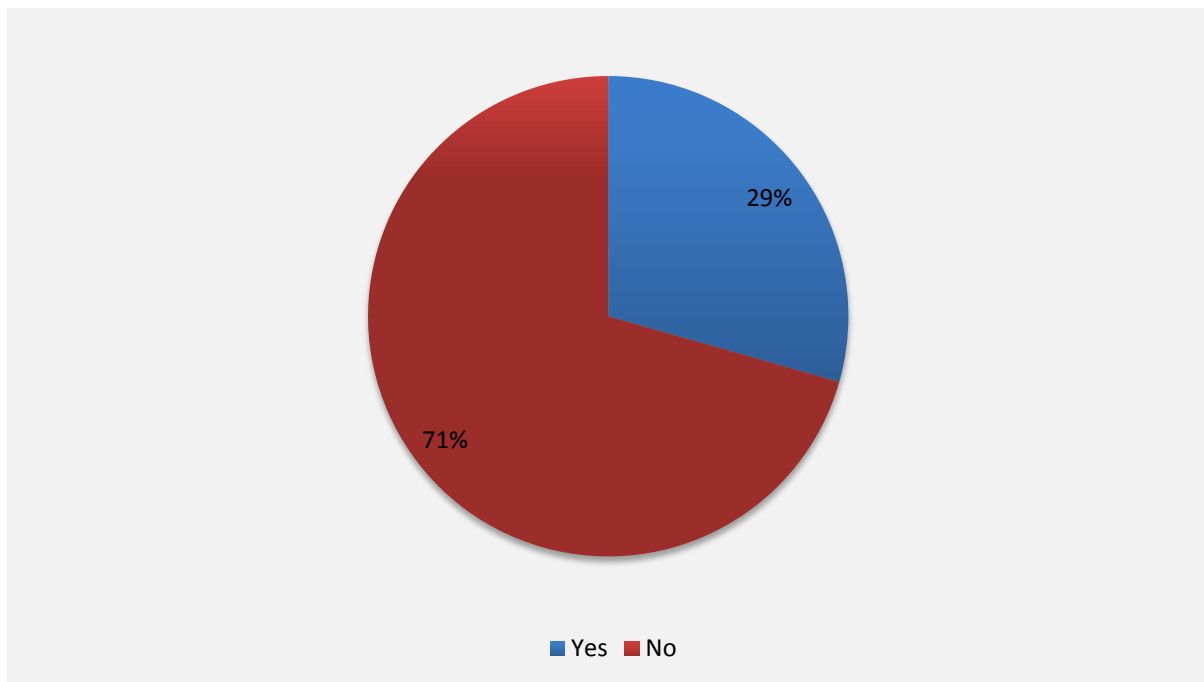
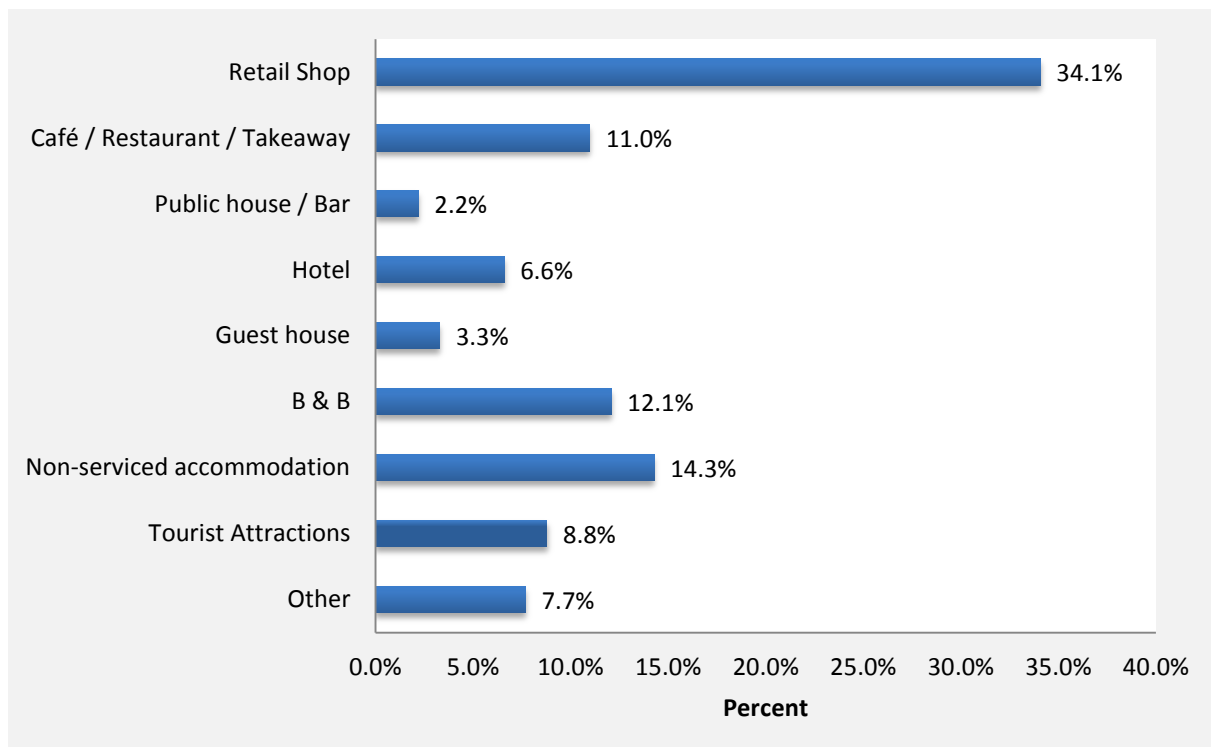


Figure 44 - Did you require extra staff for the Lumiere festival? (All Respondents)

4.3. Type of business

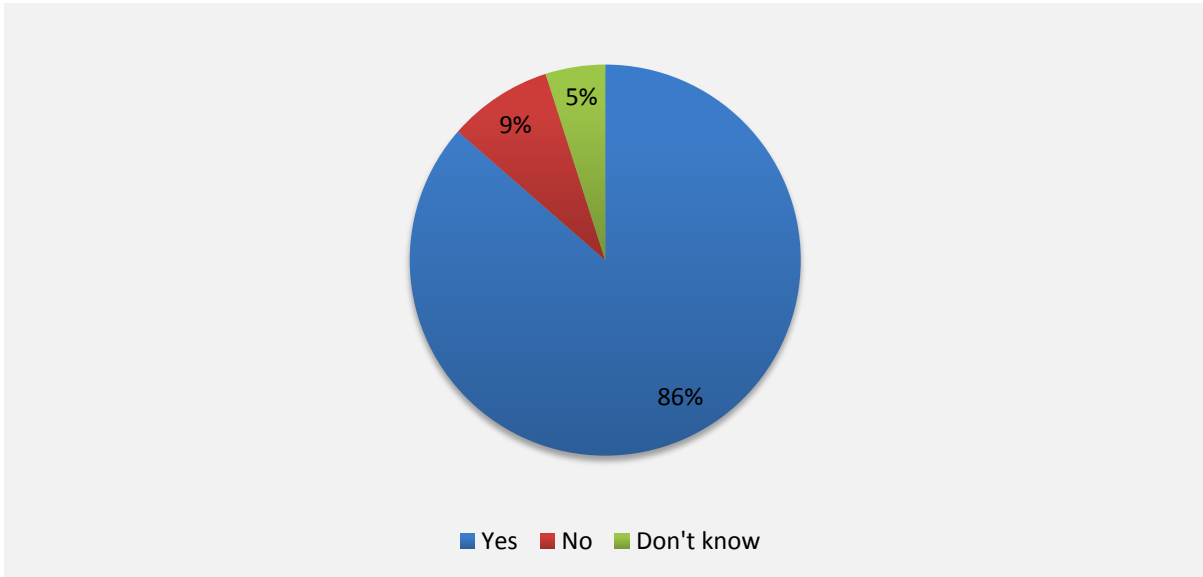
The largest proportion of businesses responding to the survey were retail shops at 34%, followed by non-serviced accommodation, B&Bs, and cafés/restaurants/takeaways at 14%, 12% and 11% respectively.

Figure 45 - Which of the following best describes your business?

4.4. Opinions of Lumiere

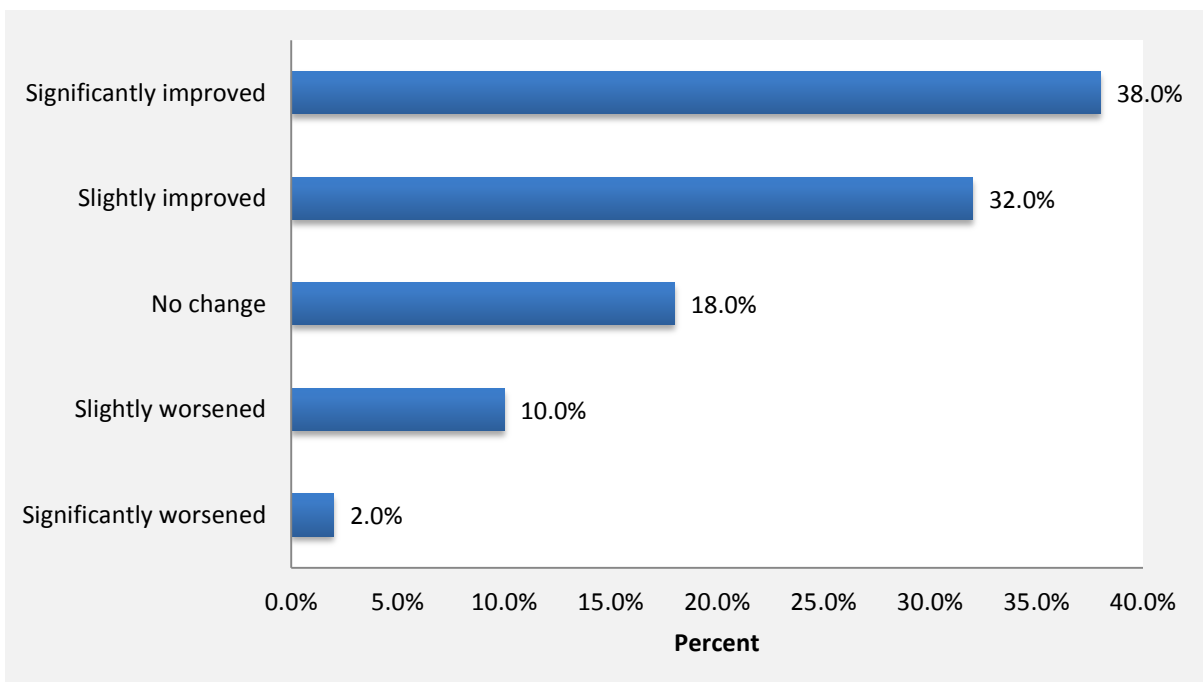
A very high proportion of businesses (86%) in Durham thought that Lumiere was good for the city and the region. Business sentiment in 2009 was similar when businesses rated the festival 8 out of 10, where 10 was excellent.

Figure 46 - Do you think Lumiere is a good thing for Durham and the region?



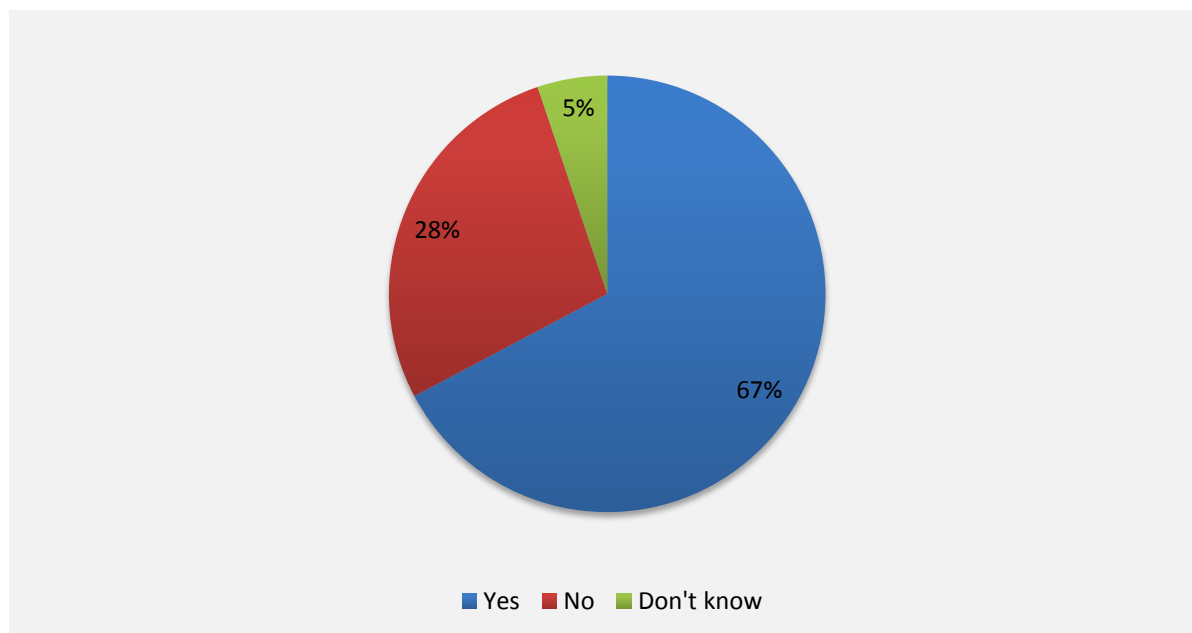
Accommodation providers were asked whether they felt that Lumiere has helped to promote Durham as a short-break destination. The results were very similar to the business survey response, with 88% responding that they felt this was the case.

Figure 47 - Do you think that Lumiere has changed people's attitudes towards coming into Durham at night?



Although accommodation providers were reporting second-hand information, a high proportion did note that their guests had told them about the problems with crowd management throughout the festival. They were however positive about what could be done in the future to alleviate the problems; some mentioned holding the festival over a longer time period and some suggested spreading Lumiere festival across the whole of the county rather than just the city.

Figure 48 - Do you have any concerns about the way the festival was organised?



4.5. Economic Impact

The economic impact of the Lumiere festival has been calculated using the regional economic multiplier model supplied by Visit County Durham. Lumiere festival attracted approximately 150,000 to Durham over the four days. This figure can be used in conjunction with the estimated spend of the following groups:

- Overseas visitors staying in paid accommodation (economic contribution of £50 per day)
- Out-of-region visitors staying in paid accommodation (economic contribution of £50 per day)
- Out-of-region day visitors (economic contribution of £15 per day)
- In-region visitors staying in paid accommodation (economic contribution of £50 per day)
- In-region day visitors (economic contribution of £5 per day)
- Crew/artists staying in paid accommodation (economic contribution of £50 per day)

The value of the PR is provisionally estimated to be £2.25m and the value of contracts spent in Durham is approximately £404,000. Adding these to the contributions of the visitors, crew and artists, the economic impact of the Lumiere festival to County Durham is **£4,330,628.28**⁷.

⁷ Subject to inflation over the period 2006-2010

5. Conclusions & Recommendations

In summary, Lumiere was, on the whole, a very successful festival albeit it with some recognised logistical issues, some of which were outside the control of the management. The festival attracted extremely large crowds to the city and generated extensive publicity and PR for Durham, including more than 1.4m page views to the website hits and global broadcast coverage. Advertising through the regional media, leaflets and posters and Lumiere website supplemented growing local awareness based on the 2009 event.

The event was inclusive, attracting both a national audience of serial arts attenders and a much more general, predominantly local or regional audience made up of mainly infrequent arts attenders. This was an event which was rooted in its setting and not simply using the historic city as a backdrop. Seventy-five percent of those responding to surveys had visited Durham specifically for the event – representing 112,000 additional visits.

Respondents were generally very positive about both their experience (82% good or very good) and especially the art installations (89% good or very good). Ninety-five percent of those surveyed agreed that Lumiere is a positive thing for Durham and for the regional economy. Those visiting for the first time were most likely to say that their general impression of the city was better than expected (67% of responses), easy to get around (62%) and easy to get to (56%). Average spend per head was in the region of £28 and more than 20% of those visiting the area stayed in hotels or bed and breakfast accommodation.

Businesses surveyed were also likely to have seen a positive impact on their business (49% positive / very positive) and to witness increased spending both during Lumiere and in the week afterwards. Eighty-six percent of business respondents thought that Lumiere was a good thing for Durham and the Region and a similar proportion of accommodation providers felt that the event had helped to promote Durham as a short-break destination.

Overall economic impact is estimated to have been of the order of £4.3m in 2011, a significant increase over the 2009 figure of £1.5m.

Crowd Management

Respondents of the survey acknowledged difficulties with crowd management, mainly as a result of very large numbers of visitors attempting to navigate a compact and constricted City Centre. The organisers imposed one-way navigation and strengthened marshalling in order to address this. The following recommendations were made by the evaluating body based upon their observations of the festival directly and by inference from the collected data.

- **Ticketed areas**

Making certain areas of the festival ticketed may help to alleviate queues and crowds at the busiest times. Visitors could collect time stamped tickets at various locations around the city that would allow them entry to certain areas (such as the Cathedral and Palace Green) between the times specified on the ticket. Tickets could be allocated on a first-come-first-serve basis. A system like this could be difficult to implement, but could distribute visitors across the whole evening and alleviate the dense crowds at the busiest times.

- **Earlier opening times**

Turning the installations on earlier in the evening may also help to distribute the visitors. Families with young children may then come earlier and those without children could come later.

- **Wider spread**

Spreading the festival over a larger area may further help to distribute the crowds. Some visitors suggested holding the festival over the entire county rather than just in the city.

- **Map**

A comprehensive map was provided for download on the Lumiere website and available in the Lumiere hub however some respondents stated that even with the map they found some installations difficult to locate. In future years, Lumiere festival could look into adding brief descriptive details on the exact locations of the installations to avoid confusion. In addition, maps could be placed on signposts in strategic locations around the city for respondents who had not picked up or downloaded a map in advance and were not familiar with Durham.

- **Signage**

To further aid navigation for visitors not familiar with the streets of Durham, the festival could add signs in appropriate places around the city centre that would help to direct people to various locations. Signs can also encourage a flow of visitors through particular bottlenecks to alleviate sticking crowds. The one way system up to the cathedral and back could be made clearer with a series of large signs on the street dictating the flow of pedestrians. Some respondents also commented that there was no information on the art at each installation. This could be addressed with a series of information signs informing visitors of the artist, the piece and the inspiration.

- **Infoscreens**

Depending on budget, the festival could look into installing an information screen in the Lumiere hub to give visitors rolling feedback of crowd issues, locations and information about the artists / installations.

Transport

- **Park and ride**

The biggest transport issue was the park and ride system. Some respondents felt unsure about where they would be picked up and when the last bus was. At busy times, respondents cited that disorderly queues would form at the park and ride bus stops and visitors would get confused about which queue to join. Signs would alleviate this problem to a certain extent but we would recommend having at least one volunteer or member of staff present during the busy periods to help visitors with the park and ride facilities. In addition, the park and ride closed at 10pm. This was not late enough for a significant proportion of visitors and encouraged them to visit the festival at the busiest times. Maintaining the park

and ride system until 11pm when the installations were turned off would again help to alleviate the crowds.