

# **Cavan Monaghan LEADER Gathering Development Programme**

## **Workshop 1**

### **Action Planning & Evaluation**

## **Action Plan**

The Action Plan for the Festival/Event will set out the event detail with aims, objectives goals and actions and example of which is provided below.

## **Evaluation**

The Evaluation template provides a means for Festival/Event committees to provide estimates of their event's impact on tourism or the local economy using standard measures which are as accurate as possible and which can be compared from year to year and from event to event.

The Evaluation template is designed to take account of the resources available to the festivals and events and their differing natures. All Festival/Event who receive funding are often required to make estimations of their tourism/economic impact based on the examples outlined below and are often required to demonstrate how they have arrived at their estimates. This may also be used to support sponsorship solicitation packages as outlined in Revenue Modelling notes.

# Action Plan

Name of the Event

## Festival Aim/Vision and Objectives

The **Festival/ Event** committee must illustrate what they hope to achieve.

## Background of the festival/event

<<insert background details here>>

*Detailed profile of the event*

Theme of the Event

History – when it was set up – how it evolved

## Committee/Group Members and Skill Set

Outline when the **Community/Voluntary Group** was founded **year** and for what purpose:

Examples:

- as a community development organisation for the **Village/Town**
- The organisation was formed to improve the social and economic conditions create a better life for **Village/Town** residents (**you may want to quantify number of residents**).

Then outline the activities the **community/ voluntary group** currently deliver on these may include economic, tourism, landscape management, and social and community events.

### Examples:

- Management, caretaking and maintenance of community buildings.
- Management of a range of events for a range of audiences from the local community and its surrounds – Active Age/ Youth Clubs/ Classes, Drama Clubs, and Health & Wellbeing etc.
- Promotion of a range of annual festivals and events.
- Cross border collaborative projects with community groups .
- The redevelopment of community **outdoor spaces** - **examples**.
- Fund raising activities in support of local area developments - **examples**.

Skill	Available within Committee (Y/N)	Committee Member Name(s)

## Goals

<<insert list of goals for next 3 years here>>

## Annual Actions

<<insert list of goals for next 3 years here>>

**(EXAMPLES ARE PROVIDED BELOW)**

<b>TIMESCALE</b>	<b>ACTIONS</b>	<b>PERSONNEL</b>	<b>Done</b>
<b>E. G. October – e.g. 9 months to go</b>	Set Date for the Festival & Event	Promoters	
	Allocate roles & responsibilities	Promoters	
	Draw up a budget for event	Event Organiser, Promoters / Treasurer	
	Apply for funding	Event organiser, Promoters / Treasurer	
	Talk to local authorities with regard to licenses etc	Promoters	
	Identify and Invite Patrons	Promoters	
	Identify High Profile Participants	Promoters	
	Establish Activities	Promoters	
	Make bookings for invited guests	Promoters	
<b>6 months to go</b>	Draw up site Plan	Promoters	
	Launch the Web Site	Promoters Conference Director Media officer	
	Start utilising social media tools	Promoters Conference Director Media officer	
	Design Publicity material & programme	Promoters Conference Director Media officer	
	Contact International Partners	Promoters	
	Contact National Historical Groups	Promoters	
	Contact Local Garda to negotiate assistance at event	Promoters / co-ordinator	
<b>5 months to go</b>	Source equipment required (refer to production list)	Promoters	
	Confirm funding is in place	Treasurer	
	Confirm Guest Speakers	Conference Director	
	Confirm High Profile Guests	Conference Director	
<b>4 months to go</b>	Marketing and Media - Promotion	Media Officer	
	Print Programmes, posters		
<b>Distribute programmes</b>	Media Officer		
<b>3 months to go</b>	Source and confirm contractors & suppliers required for event (refer to facilities checklist)	Event Organiser	

<b>2 months to go</b>	Organise temporary road signage	Media Officer	
	Conference packs ordered	Event Organiser	
<b>2 weeks to go</b>	Media advertising	Media Officer	
<b>1 week to go</b>	Confirm Bookings for attendees	Treasurer	
	Directional, Informational signage, banners to be erected	Event co-ordinator	
	Conference packs developed	Event Organiser	
<b>1 day to go</b>	Staff Briefing – stewards	Event co-ordinator	
<b>1 day to go</b>	Set –up –Festival & Event		
	Access for contractors, erect E.G Marquee, Toilet facilities	Site Manager	
	<b>All equipment set up</b>	Site Manager	
<b>Day of the Event</b>	Catering contractor – Equipment access to site	Site Manager	
	Set –up registration point/ ticket stand etc.	Site Manager	
	Venue set up	Site Manager	
<b>EVENT</b>			
<b>Post Event</b>	Post media -advertising	Media Officer	Post Event
	Evaluation/Feedback	Event Organisers	
	Final Income & Expenditure for event	Treasurer	

# Festivals & Cultural Events - Evaluation Template

## Overview

The intention of this template is to provide a means for festival and event organisers to provide estimates of their event's impact on tourism using standard measures which are as accurate as possible and which can be compared from year to year and from event to event. The template is designed to take account of the resources available to the festivals and events and their differing natures (larger or smaller festivals and events). Festivals/Events should carry out or commission their own consumer research. All festivals and cultural events should make estimations of their tourism impact based on the methodologies outlined below and demonstrate how they have arrived at their estimates.

In theory, measuring the economic impact of a festival or cultural event is straightforward:

$$\text{Value} = \text{Attendance} \times \text{Spend per Person}$$

This template will demonstrate appropriate methodologies for measuring attendance and visitor spend at the festivals and cultural events covered in each programme. The template will also include questions which must be covered in the consumer research undertaken by festivals & cultural events.

## Estimating Attendance

Calculating attendance at festivals and cultural events is perhaps the most difficult element of the equation above. Both the nature of festivals & cultural events and their venues vary widely and this has major implications on how to physically count the number of attendees. Thus a theatre festival and a free concert on a town's main street, will require different approaches. Nevertheless, one or a combination of the methodologies explained below can provide a reasonable estimate of attendance.

## *Accommodation Survey*

This is the simplest way of ascertaining the number of people from outside the locality who have come to visit the festival/cultural event. Basically, all it involves is establishing from accommodation providers (i.e. hotels, B&Bs etc.) how many additional guests have stayed at their establishments as a consequence of the festival/event and how long they've stayed for. Ideally, all of the accommodation providers in the locality should be included but realistically that may not be possible for larger urban areas. Instead a sample of accommodation providers should be asked:

- (a) How many guests would stay at their establishment on a normal night?
- (b) How many additional guests stayed as a consequence of the festival/cultural event?
- (c) Country of residence of additional guests?
- (d) How many nights guests stayed for?

All types of accommodation should be included in the sample, with minimum of three establishments to be included from each group where possible, as the table below demonstrates. The estimated number of overnight visitors to the town and the total number of bednights that they spent in the town can be calculated as follows.

**Table 1 – Overnight Visitor Estimates (Example)**

Accommodation Type	No. of Businesses	Sample	Average No. of Additional Guests	Estimated No. of Additional Guests	Average Nights Stayed	Estimated No. of Bednights
Hotel	6	3	7.6	(7.6 x 6) = 46	1.2	55
Guesthouse/B&B	25	5	2.8	(2.8 x 25) = 70	1.5	105
Self-Catering	15	3	2.3	(2.3 x 15) = 35	2	70
Hostels	1	1	7	7	2	14
<b>Total Overnight Visitors</b>				<b>158</b>	<b>n/a</b>	<b>245</b>

The accommodation survey can also be used to ascertain where the guests have come from. It can easily be administered in any locality and does not require a lot of resources (a series of phone calls or simple form distributed and filled in by accommodation providers during the festival/event is sufficient) an accommodation survey should be undertaken by festival/event organisers. To ensure that accommodation providers co-operate it is important that they are informed of the survey and its purpose well in advance of the festival/event itself.

### ***Ticket Sales***

Where some or all events organised as part of the festival/cultural event are ticketed, sales of tickets are an obvious way of ascertaining how many attended the festival/event. Of course, there are pitfalls such as the possibility of double-counting people who attend more than one event during their time at the festival/cultural event. This can be alleviated by including a question of the number of events attended in consumer research. Using ticket sales may also underestimate festival/event attendance, if free events form part of the programme of activities or if a significant number of people accompany those attending ticketed events but do not themselves attend. In these instances ticket sales may have to be used in conjunction with some other methods outlined below.

Of course, if some or all events are free to the public, than estimating attendance is more difficult and the approach used is very much dependent on the type of venues used.

### ***Enclosed Venues***

If the festival/cultural event utilises one or more enclosed spaces for events (i.e. museums, pubs, sports grounds etc.), it should still be possible to estimate the numbers of people attending even if no tickets are sold. One method of doing this would be to get an estimate of attendance from the venue owner or manager. Many will have a good idea of the capacity of their venue and can provide a rough estimate based on how full or empty it is. For instance, a “half-full” venue with a capacity of 100 people equates to an attendance of roughly 50 people.

A more time consuming, though still comparatively cheap means of establishing attendance at free to the public events in enclosed spaces is to use tally counters such as the one in the photograph below.



### Photo 1 – Tally Counter



Using this simple device, which costs about €20, someone acting on the behalf of the festival/event organisers can count those attending an event by “clicking” it when someone enters. If an event, such as an exhibition, is taking place throughout the day or a week, it may be more appropriate to count attendees using a sample of shifts, making sure to include peak and off-peak times and weekdays and weekends as appropriate. Table 2 below demonstrates how the number of attendees might be calculated for a single day.

**Table 2: - Count Estimates (Example)**

<b>Period</b>	<b>Time (hrs)</b>	<b>No. of 1hr. shifts</b>	<b>No. entering during shift</b>	<b>Estimated entrants during shift</b>
	(1)	(2)	(3)	(4)=(1x3)
Off-Peak (9am-12pm)	3	1	70	210
Lunch Peak (12pm-2pm)	2	1	100	200
Off-Peak (2pm-5pm)	3	1	80	240
Evening Peak (5pm-9pm)	4	1	150	600
Total	12	4	400	1,250

Obviously, if the festival/event continued over a number of days a similar though slightly more elaborate series of calculations would be needed.

### ***Streets and Other Open Venues***

Counting attendance at an event in an open space is very often more difficult as there may be multiple entrances, with people flowing in and out of the designated area repeatedly. In such a situation, it may also be possible to use tally counters but those involved would probably need to cover all entrances simultaneously during shifts, greatly increasing the required manpower involved. Alternatively, festival/event organisers could use Garda estimates of attendance during the period. Experience suggests that these estimates can vary; as their accuracy is dependent on the training and experience of the Garda making the estimate, and therefore should be used reluctantly. If Garda estimates are used, then they should be in written form on official Garda notepaper.

## **Source of Visitor Counts**

As far as possible, visitor counts and accommodation surveys should be conducted independently of the festival/cultural event organisers. In the case of festivals and cultural events, this could be done by the same organisation undertaking the consumer research, as they should have the requisite expertise and experience. A suitable alternative would be to get the assistance of local third-level institutions.

## **Estimating Visitor Spend**

In comparison to estimating visitor numbers, estimating how much people have spent is more straightforward.

## **Accommodation Survey**

Once again, the survey of accommodation providers is a useful source of information, as it can be used to establish how much overnight visitors spent on their accommodation while in the town. This can be established at the same time as enquiring about the number of additional guests, their origin and length of stay. This figure should be based on the bed & breakfast rate or include any additional amount spent on breakfast.

## **Visitor Survey**

The visitor survey is the main element of the research obligations of festivals and cultural events. In order to achieve a sufficient take up of respondents and enable more accurate responses, visitors should be interviewed face-to-face using a structured questionnaire. The questionnaire must, as a minimum, include the questions listed in Appendix A, using the wording and format outlined.

## **Per Diem Spends**

Smaller festivals and cultural events often funding will not have the resources to commission visitor surveys. In order to allow organisers estimate the expenditure of visitors to these festivals/events, Fáilte Ireland have calculated the following daily (or per diem) expenditure estimates for the following distinct types of visitor.

Per diems – spend per person per day (based on 2009 data – last revised December 2011)

- Overseas visitors €65
- Overseas holidaymakers €100
- Domestic overnight trips €60
- Domestic day trips €40

*Source: Fáilte Ireland Tourism Facts 2011*

These expenditure figures exclude spending on accommodation, which would be estimated from the Accommodation Survey outlined above. Since these figures relate to 2009, festival/event organisers will need to increase expenditure estimates in line inflation of subsequent years; using the inflation rate derived from the official CSO Consumer Price Index.

## **Sample Size**

Choosing a sample of visitors to be interviewed as part of a visitor survey is a matter of judgement, given that it involves balancing the requirement for accuracy with limited

resources. As Table 3 below demonstrates; results from a survey with this sample size would be indicative in nature and, if possible, a larger sample should be used.

**Table 3: - Accuracy of Results Based on Different Survey Sample Sizes**

Sample Size	Margin of Error
150	± 8.0%
200	± 6.9%
250	± 6.2%
300	± 5.6%
400	± 4.9%
500	± 4.3%
1,000	± 3.0%

Like the visitor counts, interviews for the visitor survey should be spaced over different times of the day and, where appropriate, days of the week. Once again, this can be done using a series of interviewing shifts over the duration of the festival/event. There should also be a reasonable spread of genders and age groups in the sample, though this should be in the form of a guideline rather than a strict quota. Taking the example of a four day festival, which appeals to all age groups, a sample framework might look like this.

**Table 4: - Sample Framework (Example)**

	Thursday	Friday	Saturday	Sunday	Total
<b>Time (Quotas)</b>					
Morning	10	15	25	25	75
Afternoon	15	20	25	50	110
Evening	15	25	50	25	115
Total	40	60	100	100	300
<b>Gender (Rough Quota)*</b>					
Male	20	30	50	50	150
Female	20	30	50	50	150
<b>Age (Rough Quota)*</b>					
16-34	15	24	40	40	119
35-49	15	24	40	40	119
50+	10	12	20	20	62

\*Quota not to be rigidly applied but a minimum number of interviews would be set (i.e. a minimum of 120 for each gender).

This assumes that visitor numbers are skewed towards the evenings and weekends and that Thursday and Sunday evening will be comparatively quiet. Of course not all festivals follow this pattern, with the result that sample frames will vary.

### Summary of Evaluation Methodologies

Table 5 below outlines the methodologies to be used in calculating visitor attendance and expenditure figures.

	Larger Festivals/ Cultural Events	Smaller Festivals/ Cultural Events
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<b>Total Attendance Estimate</b>	Ticket sales, Venue managers, Tally counters, Garda estimates	Ticket sales, Venue managers, Tally counters, Garda estimates
<b>Overseas Visitor Numbers</b>	Accommodation Survey or Visitor Survey	Accommodation Survey or Visitor Survey (optional)
<b>Domestic Staying Visitor Numbers</b>	Accommodation Survey or Visitor Survey	Accommodation Survey or Visitor Survey (optional)
<b>Domestic Day Trippers</b>	Visitor Survey	Total Attendance minus (Overseas Visitor Numbers +Domestic Staying Visitors)
<b>Overseas Visitor Accommodation Spend</b>	Accommodation Survey	Accommodation Survey
<b>Domestic Staying Visitor Accommodation Spend</b>	Accommodation Survey	Accommodation Survey
<b>Overseas Visitor Non-accommodation Spend</b>	Visitor Survey	Per Diem Spend Estimate or Visitor Survey (optional)
<b>Domestic Staying Visitor Non-accommodation Spend</b>	Visitor Survey	Per Diem Spend Estimate or Visitor Survey (optional)
<b>Domestic Daytripper Spend</b>	Visitor Survey	Per Diem Spend Estimate or Visitor Survey (optional)

## Appendix A – Examples of Questions For Inclusion In Evaluation of Festivals & Cultural Events

### Compulsory Questions

The following questions must be included in the visitor surveys which are examples for evaluation purposes.

Q.1 Where do you live? **Code below**

Republic of Ireland	1
Northern Ireland	2
Great Britain (excl. Northern Ireland)	3
United States of America	4
France	5
Germany	6
Netherlands	7
Other ( <i>Please specify</i> _____)	8

Q.2a Overall, how many nights do you intend to spend in \_\_\_\_\_ (town name)?

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**No. of Nights**

Please fill in all boxes – “000” if no nights spent in town

If Q2a>0, THEN ASK

Q.2b. Did you spend more nights than you originally intended in \_\_\_\_\_ (town name) as a result of \_\_\_\_\_ (festival/event name)?

	Yes	1
	No	2

Q.3 Which of the following types of accommodation are you using while in \_\_\_\_\_ (town name)?

**RECORD ONE ONLY**

<b>READ OUT</b>	
Hotel	1
Guesthouse/B&B	2
Hostel	3
Caravan/camping	4
Rented holiday home	5
Other (SPECIFY _____ & CODE)	6

Q.5 Which of the following best describes your party during your stay in \_\_\_\_\_ (town name)?

**SINGLE CODE**

Travelling alone	1
With Husband/wife/partner	2
With family (children under 15 years)	3
With adult friends or other adult party	4
Other (SPECIFY _____ & CODE)	5

Q.4a How much did you/your party spend on accommodation in \_\_\_\_\_(town name)?

*Please remember to include anything you might have spent using credit cards, or any amount charged to or paid for by a third party outside of the Republic of Ireland, such as your firm.*

**WRITE IN AMOUNT AND NUMBER COVERED BY AMOUNT**

**Amount**

**Currency**

**No. covered**



Q.4b Ignoring expenditure on accommodation, how much did you/your party spend in \_\_\_\_\_(town name)?

*Please remember to include anything you might have spent using credit cards, or any amount charged to or paid for by a third party outside of the Republic of Ireland, such as your firm.*

**WRITE IN AMOUNT AND NUMBER COVERED BY AMOUNT**

**Amount**

**Currency**

**No. covered**



Q.6 How important (on a scale of 1 to 5) where 5 = extremely important and 1 = not at all important, was \_\_\_\_\_ (name of festival/event) to your decision to visit \_\_\_\_\_ (town name)?

- |   |                      |
|---|----------------------|
| 5 | Extremely important  |
| 4 | Very important       |
| 3 | Neither              |
| 2 | Not very important   |
| 1 | Not at all important |

- |   |
|---|
| 5 |
| 4 |
| 3 |
| 2 |
| 1 |

Q.7 Which of the following sources of information did you use to find out about \_\_\_\_\_ (name of festival/event)? **READ OUT**

Travel Agent	1
Tour Operator	2
Fáilte Ireland/Tourism Ireland/Irish Tourist Board	3
Promotional Literature on Ireland	4
Advertising Please specify whether TV ( ) Radio ( ) or Press ( )	5
Travel Programmes on TV/Radio	6
Articles in Newspapers/magazines	7
Friends, relatives or business associates	8
Guide Books	9
The Internet	10
Other (specify _____)	11
Don't know	12

Q.8. What was your age on your last birthday?

**State exact and code**

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Q.8. Age

	16-24	1
	25-34	2
	35-44	3
	45-54	4
	55-64	5
	65+	6

DO NOT ASK

Q.9. Gender

	Male	1
	Female	2

### Recommended Questions

While information derived from the above questions are important for Fáilte Ireland's monitoring of festival/event performance, we believe that there are numerous other areas can usefully be explored as part of a visitor survey. These include:

- **Demographic Profile** – Establishing the socio-economic background of those who attend a festival/event would be useful in guiding marketing activity and perhaps future content. In general, independent researchers will have standardised questions to establish whether a respondent fits into the AB, C1, C2 of DE socio-economic groups.
- **Satisfaction Ratings** – Visitor ratings on festival/event content, facilities, pricing and organisation can assist in pointing out where the festival/event is performing well and where it needs to improve.
- **Visitor Recommendation** – Along with a question to establish overall satisfaction with the festival/event, a question which asks whether a visitor is prepared to recommend the festival/event to a friend or acquaintance is a good assessment of how well the festival/event is doing because of the crucial role of word of mouth in generating tourism activity.
- **Visitor Suggestions** – Visitors, of course can also assist by making direct suggestions as to how a festival/event can be improved.