



**ONTARIO MAJOR FESTIVALS AND EVENTS ATTRACTION  
RESEARCH STUDY**

**FINAL REPORT**

**Prepared for the Ontario Tourism Competitiveness Study  
Ministry of Tourism**

**Prepared by:**

**PKF  
Consulting**

*In association with:*



**Research Resolutions**

**February 2009**

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ISBN 978-1-4249-8929-4 (PDF)

## TABLE OF CONTENTS

<b>1.0</b>	<b>INTRODUCTION .....</b>	<b>1</b>
1.1	STUDY BACKGROUND .....	1
1.2	STUDY PURPOSE.....	1
1.3	SCOPE OF STUDY.....	1
<b>2.0</b>	<b>A WORKING DEFINITION FOR A “MAJOR INTERNATIONAL FESTIVAL OR EVENT” .....</b>	<b>3</b>
2.1	A DISCUSSION OF WORKING DEFINITIONS .....	3
2.2	DO “FESTIVALS” BELONG IN AN EVENTS TOURISM STRATEGY? .....	3
2.3	DOES MC&IT BELONG IN AN EVENTS TOURISM STRATEGY? .....	4
2.4	TWO APPROACHES TO SEGMENTATION .....	5
2.5	TYPES OF EVENTS.....	6
2.6	IN SEARCH OF A NUMBER OR A PHRASE .....	6
2.7	TRIPLE BOTTOM LINE PERFORMANCE METRICS – ECONOMIC, SOCIAL AND ENVIRONMENTAL .....	9
2.8	RECOMMENDED DEFINITION.....	10
<b>3.0</b>	<b>SCOPE OF ONTARIO’S FESTIVALS &amp; EVENTS SECTOR .....</b>	<b>11</b>
3.1	INTRODUCTION .....	11
3.2	SIZE OF THE FESTIVALS & EVENTS SECTOR IN ONTARIO .....	11
3.3	WHAT TAMS CAN OFFER: MARKET POTENTIAL FOR FESTIVALS AND SPORTING EVENTS .....	16
<b>4.0</b>	<b>AN OVERVIEW OF ONTARIO’S MAJOR INTERNATIONAL FESTIVALS AND EVENTS .....</b>	<b>19</b>
4.1	INTRODUCTION .....	20
4.2	MAJOR SPORTING EVENTS & COMPETITIONS.....	20
4.3	MAJOR CULTURAL FESTIVALS AND EVENTS .....	24
4.4	BUSINESS EVENTS .....	25
4.5	SUMMARY .....	27
<b>5.0</b>	<b>CURRENT SITUATIONAL ANALYSIS: A REVIEW OF STRATEGIES, PROGRAMS &amp; POLICIES TO SUPPORT ONTARIO’S FESTIVALS &amp; EVENTS .....</b>	<b>28</b>
5.1	INTRODUCTION .....	28
5.2	A REVIEW OF PREVIOUS STUDIES .....	28
5.3	STRATEGIES AND POLICIES PERTAINING TO FESTIVALS AND EVENTS .....	29
5.4	ONTARIO’S PATCHWORK OF FUNDING FOR FESTIVALS AND EVENTS .....	34
5.5	SUMMARY .....	36
<b>6.0</b>	<b>STRENGTHS AND AREAS FOR IMPROVEMENT OF ONTARIO’S FESTIVAL &amp; EVENTS.....</b>	<b>37</b>
6.1	INTRODUCTION .....	37
6.2	SPORTING EVENTS.....	37
6.3	CULTURAL FESTIVALS & EVENTS.....	39
6.4	BUSINESS EVENTS .....	38
<b>7.0</b>	<b>DEVELOPING A 15-YEAR CALENDAR OF EVENTS .....</b>	<b>39</b>
7.1	INTRODUCTION .....	39
7.2	SPORTING EVENTS.....	39
7.3	CULTURAL FESTIVALS AND EVENTS.....	40
7.4	BUSINESS EVENTS .....	41
7.5	CONCLUSION.....	41

<b>8.0</b>	<b>BEST PRACTICES IN OTHER JURISDICTIONS .....</b>	<b>43</b>
8.1	INTRODUCTION .....	43
8.2	SUMMARY OF MAJOR EVENT STRATEGIC PRACTICES BY JURISDICTION .....	44
<b>9.0</b>	<b>TOWARDS A STRATEGIC FRAMEWORK FOR A MAJOR EVENTS TOURISM STRATEGY ...</b>	<b>56</b>
9.1	INTRODUCTION .....	56
9.2	BEST PRACTICES – MAJOR INTERNATIONAL FESTIVALS AND EVENTS STRATEGY DEVELOPMENT .....	56
9.3	CURRENT SITUATIONAL ANALYSIS OF ONTARIO’S MAJOR FESTIVALS AND EVENTS SECTOR .....	59
9.4	RECOMMENDATIONS FOR A STRATEGIC FRAMEWORK FOR ONTARIO .....	65
9.5	IMPLEMENTATION CONSIDERATIONS .....	85

**APPENDIX A: Various Definitions of Events and Event Tourism**

**APPENDIX B: Size of Ontario’s Festivals & Events Sector**

**APPENDIX C: Celebrate Ontario & Festivals and Events Ontario – 2008 Initiatives**

**APPENDIX D: Comparative Strategic Practices in National & International Jurisdictions**

## EXECUTIVE SUMMARY

### Introduction

As part of the *Ontario Tourism Competitiveness Study*, the Ministry of Tourism (“MTOUR”) retained PKF Consulting in association with Research Resolutions to complete an *Ontario Major Festivals and Events Attraction Research Study* to determine the size of the Ontario festival and event industry and to review the best practices of other jurisdictions’ festival and event attraction and support programs.

### Definition Research

The first task for the consultants was to develop a working definition of a “major international festival and event” for the purposes of the study. Our research has determined that there are various ways to interpret this definition, depending on a jurisdiction’s priorities and event strategies. The most relevant definition for the Ministry of Tourism’s purposes was identified as one that would be expected to generate an extraordinarily high level of tourism and high visibility for the host location. Criteria for determining the benefits of a major international event for Ontario is expected to be based on a matrix of relevant tourism, social, economic and environmental factors – a triple bottom line.

Furthermore, the research led to a recommendation for MTOUR to transition from a Festivals and Events Strategy to a two-tier strategy. The first tier would be a *Major Events Tourism Strategy*. This strategy would de-emphasize locally oriented community events and emphasize the regional, “iconic” or mega aspect of events and a tourist focus in the strategic planning process. The 2<sup>nd</sup> tier would focus on locally-oriented *Regional Emerging Festivals & Events* that may have the potential to transition from a local event to one with an international draw.

For a potential major events tourism strategy, it was recommended that MTOUR use the same sub-categories as do other major jurisdictions:

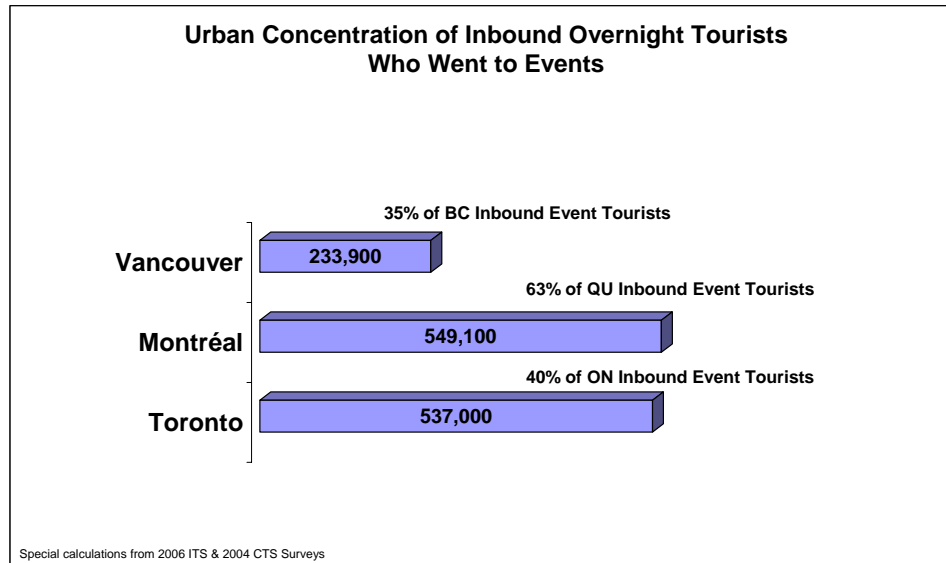
- Sporting events
- Cultural events
- Business events

### Ontario’s Situational Analysis

In the absence of comprehensive or accurate estimates of tourist attendance available from Ontario’s festivals and events or government organizations, we have used Statistics Canada’s international and domestic travel surveys as the basis for establishing order-of-magnitude estimates of event tourists’ volume, spending and economic impact in Ontario.

During a typical year, an **estimated 5.1 million overnight tourists in Ontario went to festivals and sporting events**. About 1.3 million (25%) of these tourists reside in provinces other than Ontario, in the U.S.A. or in other countries. The remaining 3.8 million event tourists are Ontario residents. Using high, medium and low assumptions about the extent to which trips were made because of events in the province, incremental spending or spending attributable to events by inbound tourists would range between \$100 million and \$400 million over the course of a typical year.

As Canada’s largest province and the one that attracts more domestic and foreign tourists than any other, Ontario captures inbound event tourists at about the same rate (.10) as does Quebec (.11) but at a lower rate per capita than does British Columbia (.15). A goal for a Major Event Tourism Strategy might be to increase the share of inbound event trips to the province to the level currently achieved in Quebec or British Columbia.



Order-of-magnitude estimates of potential market share among the American and Canadian travelling public for various types of festivals and events can be extracted from the Travel Activity and Motivation Study conducted in 2006 (TAMS). Almost half a million American adults say they took a trip over a two-year period on which the main activity was to attend a national or international sporting event such as the Pan Am Games, the Olympics, etc. Of the 468,500 American overnight pleasure travellers in the market for international or national sporting events, 7% have visited an Ontario destination over a two-year period. The market size for professional soccer is marginally higher than for professional figure skating competitions. About 5 million American tourists would be in the market for music and/or food/drink festivals, and 2.6 million have taken trips where ethnic festivals were the main activity. Theatre festivals are trip drivers for about one million American tourists (983,000) and over one-half million take trips in order to go to international film festivals (693,000), literary festivals (582,000) and/or comedy festivals (500,000).

The Canadian tourist markets as a whole and for special events are appreciably smaller than those in the U.S. Curling has more cache among Canadians than it does among American travellers, and appreciably more adults would attend a bonspiel than take a trip to a national or international sporting event (i.e., professional figure skating championship). Including Ontario residents, about 50% of sporting-event oriented tourists have taken an overnight pleasure trip within Ontario over the two-year time period. As with the Americans, the Canadian audience potential for most of the “festivals” listed in the TAMS survey is appreciably larger than those for the sporting events. About one-half million Canadian tourists would be in the market for a music festival while about half this number have taken trips where a food/drink, ethnic and/or theatre festival was the main activity.

## History of Ontario’s Major Festivals & Events

### Sports

Within the last 20 years, Ontario has played host to a number of major sporting events and competitions however, it has lost two high profile *Olympic* bids and a previous bid for the *Pan Am Games*. The successful events have varied from recurring national events held at the same venue, to major events that required a rigorous bidding process to win the rights to host. During the calendar year, 2008, Ontario will have hosted an estimated 14 major sporting events, i.e., *Canadian Open Men’s & Women’s Golf Tournaments* (Oakville & Ottawa). As for current bids, the City of Toronto and 11 other municipalities within the Greater Golden Horseshoe are currently in the process of bidding on the *2015 Pan Am Games*.

The games are expected to draw-in approximately 7,500 athletes from 42 countries, with a further 250,000 tourists coming into the area. The estimated price tag to host the games is \$1.77 billion, with funding support by all 3 levels of government.

Overall, the Province of Ontario has been unsuccessful in attracting and hosting mega-sporting events, like the *Olympics*, but has met with success in terms of attracting national and international single sport events. However, the potential for hosting such large-scale events exists, given the appropriate levels of investment in both the bidding process and associated infrastructure and resources.

### Cultural Events

Ontario offers a number of major recurring festivals throughout the province, and has hosted several one-time cultural events over the past 10 to 20 years. One of the major recurring festivals is the *Toronto International Film Festival*, which drew over 340,000 admissions in 2007, while one-time major events include the *Barnes Exhibit* at the Art Gallery of Ontario in 1994. Currently, the City of Ottawa is bidding to host the *2017 World's Fair*.

Historically, the Province has featured a very limited sprinkling of one-time events, which could be considered "blockbusters". Yet the Province offers 5 festivals that have grown over the past 20+ years to become major international events, and draw tourists from outside the province.

### Business Events

Ontario has hosted very few events that fit the minimum criteria of attracting 10,000 delegates and/or high media exposure events such as meetings of the G-8 Summit. One of the major historic business events hosted in Ontario was the *XVI International AIDS Conference* in Toronto in 2006, which attracted more than 15,000 delegates representing 187 countries. Furthermore, the *American Institute of Architects Convention* will be held in Toronto in 2017, with an expected total of 25,000 delegates.

Large-scale international conventions are primarily hosted by the City of Toronto, and sourced by the destination marketing organization (DMO) in partnership with the event venue(s). On average, since 1995, Toronto has historically attracted one to two conventions of more than 10,000 delegates per year, with a total of 13 more on the books for the next 15 years.

### **Strategies, Programs & Policies to Support Ontario's Festivals & Events**

Various cities and regions within the province are all trying to address the need for a strategic approach and establishing formal policies around bidding guidelines in their efforts to attract events, as exemplified by the following initiatives:

- The City of Toronto's Major Events Project has led to the development of a Major International Event Policy. This policy outlines a shared federal/provincial and municipal approach to the development and funding of an Events Strategy. Plans call for the City of Toronto Major International Event Policy to be presented to City Council in October 2008.
- Ottawa's Economic Development Division has commissioned a study to develop Major Event Funding Guidelines that will assist the City in the decision-making process for determining which programs/initiatives to support, and to put performance measurements in place to measure the return on investment.

- Two of the primary strategic opportunities for Tourism Hamilton include: positioning the bid for the 2015 Pan Am Games as a Greater Golden Horseshoe opportunity, and partnering on strategic bids for sporting events and conventions in Hamilton.
- FedNor has recently commissioned a study to determine how to be more strategic in its contributions to sports tourism in Northern Ontario.

Other relevant policies and funding programs that have been put in place to support Ontario's festivals and events include:

- Ministry of Health Promotion – International Amateur Sport Hosting Policy;
- Ministry of Tourism – Celebrate Ontario initiative;
- Ministry of Culture – Ontario Cultural Attraction Fund;
- Ontario Trillium Foundation (Ministry of Culture) – Province-Wide Program;
- Ontario Tourism Event Marketing Partnership Program & Event Marketing and Development Fund (Ontario Tourism Marketing Partnership Corporation); and,
- Ontario Arts Council – Project, Operating and Programming Grants.

Bidding and hosting of sporting events in Ontario is largely done on an event by event basis. Cultural festivals and events tend to be driven by the host organizations and venues which then rely on a variety of funding programs to attract, develop and support these types of events, and large-scale international conventions are targeted by the DMO and venues, with funding support provided through the destination marketing fee.

### **Strengths and Areas for Improvement of Ontario's Festivals & Events**

Ontario has much to offer in terms of attracting, developing and supporting major sporting, cultural and business events.

Key strengths and areas for improvement in terms of Ontario's capacity to attract and host major international sporting, cultural and business events were identified as follows:

#### **Strengths:**

- Sport – world-class facilities to host events, natural resource/product strengths in Ontario (i.e., Great Lakes), multi-modal transportation infrastructure between major cities, major hotel room blocks for tourists;
- Culture – signature events located in urban areas with the necessary infrastructure, new festivals are focusing on product strengths (entertainment, history) and emerging trends (culinary, film); and
- Business – Toronto, Niagara Falls and Ottawa/Hull can handle major international events (over 10,000 delegates) and are well positioned to attract major business events; DMOs are present in each major urban centre in Ontario to coordinate event bidding and hosting.

#### **Areas for Improvement:**

- Sport – need for better coordination and strategy for bidding;
- Culture – few blockbuster events draw out-of-province visitation; need for coordinated strategy around cultural events and funding sources; and,
- Business – challenges around border crossing and exchange rates; need for strategic framework to attract specific types of business events.



## 15-Year Calendar

The majority of all sporting, cultural and business events in Ontario are held within the peak season months of June, July and August, followed by the shoulder season for cultural and business events and the off-season for sporting events. This knowledge will be useful for future strategic planning around bidding on and hosting major international events.

Due to the regularly scheduled nature of sporting events, a 15-year calendar of upcoming events was developed, based on the international governing bodies of the major sports organizations.

Cultural events that are available through an international bidding process tend to be non-recurring, while other major cultural events are specific to a destination. New cultural events tend to be created organically, or travelling exhibitions/events available for hosting are identified by host venues in conjunction with representatives of specific artistic or cultural disciplines. In contrast, business events are sourced by the sales and marketing efforts of a DMO and the competitive nature of large-scale business events prevents public access to long-term information about upcoming events. Hence, the development of a long-term calendar was not feasible for either of these event sectors.

## Best Practices in Other Jurisdictions

As background input for the development of a strategic framework for Ontario's festivals and events sector, an assessment was conducted on the strategic practices employed in other jurisdictions for the attraction and support of major events. Research has been completed on the following eight international and five Canadian jurisdictions:

- Scotland
- Ireland
- North East England
- Northwest England
- UK Sport
- Australia – Western Australia and Victoria
- New Zealand
- Finland
- Québec
- Nova Scotia
- Newfoundland and Labrador
- BC
- Edmonton

The combination of jurisdictions analyzed for this report provide a variety of best practices in the realm of strategy development, and attraction and hosting of major international events. It should be noted, however, that as separate entities, no single jurisdiction provides all the necessary information for developing Ontario's strategic framework. Throughout our best practices research, several common themes emerged with regards to the strategic practices employed in various national and international jurisdictions. Although the structures and resources surrounding these practices may differ from place to place, certain key lessons have been identified for consideration in the development of Ontario's strategic framework for events, as listed below:

### Management & Sustainability

- Developing a Strong Organizational Structure to Attract, Support and Develop Major Events;
- Developing a Sustainable Event Profile & Event Calendar;
- Importance of Due Diligence;
- Performance Measurement and Coordinated Bidding = Risk Mitigation; and,
- Environmental Sustainability.

#### Identifying Strategic Priorities & Ensuring the Legacy for Major Events

- Creating a List of Priorities for Selecting Major Festivals & Events;
- Event Sectors Dominate Major Event Strategies;
- Quality vs. Quantity – Emphasizing Diversity over Event-Driven Strategies;
- Hosting Major Sporting Events Should Not Be Planned In Isolation;
- Creating an Inventory of Event Infrastructure; and,
- Setting up Policies for International Event Bidding.

#### Developing Partnerships and Funding Policies to Support Major Events

- Private-Public Partnerships Secure Major International Events & Enhance Tourist Demand; and,
- Prioritizing Funding Policies.

Also, with regards to Commemorative Events, best practice research determined that these events require long-term planning and substantial budgets. MTOUR needs to be aware of all these practices in order to ensure that Ontario can effectively compete on a world-class stage to host international events.

### **Establishing the Strategic Framework for a Major Events Tourism Strategy**

The *Festival and Event Attraction and Support Study* is intended to provide the Ontario Government with clear recommendations in developing a strategic framework to target major international and national festivals and events with the greatest economic potential and raise the profile of Ontario. The combination of best practice research, lessons learned, and literature review forms the recommended foundation for an Ontario strategic framework to target major festivals and events with the greatest economic potential to increase the tourism competitiveness of Ontario, and provides suggested implementation considerations.

Our research indicates that successful jurisdictions undertook a strategic approach to targeting major festivals and events based on a common set of key activities:

- **Priority-Setting – Targeting Types of Events**
  - Major events can be defined by:
    - Sector;
    - Size/Significance; and,
    - Frequency.
- **Building on a Jurisdiction’s Natural Strengths and Assets**
  - Most successful event strategies were developed by building on the jurisdictions’ strengths and natural assets, regardless of whether the strategy is focused on event significance, size or sector. Strengths include: cultural attractions, availability of infrastructure, unique bio-diversity and eco-systems, local heritage, current business climate/opportunities and innovations in industry.
- **Linking to Overall Tourism Priorities**
  - Most best practice jurisdictions linked their major events strategies to their overall tourism priorities, and have established criteria to provide the framework for assessing event opportunities, including their potential impacts and legacies. Common criteria include measurements of: social impacts, economic impacts, tourism impacts, development impacts, and media profile.
- **Prioritizing Government Supports/Resources**
  - Best practice research in key comparable jurisdictions to Ontario indicate that leading jurisdictions targeted major events separately from smaller, regional and/or local events. In some leading jurisdictions, a separate longer-term strategy was also developed to support emerging major events with high potential to become major events.

- **Identifying a Long-Term Approach to Supporting Festivals and Events**
  - The literature suggests that a long-term approach to supporting major festivals and events is important. This approach is based on creating a diversified portfolio of events that make use of available tourism product (i.e., infrastructure, resources, activity base) and maintains a balance of recurring and non-recurring events from different sectors).
- **Developing a Strong Evaluation and Funding Delivery Structure with Clear Roles**
  - Best practice trends stress the importance of establishing an organizational framework with specific roles and responsibilities and a sustainable funding delivery mechanism to attract and support major festivals and events.

Ontario appears to be well suited for major event and festival tourism. Its major strengths include:

- Provincial commitment to the festivals and events sector;
- Existing successful events; and,
- Size of festivals and events sector in Ontario.

Ontario's strong product offering and assets provide unique opportunities for hosting major events:

ONTARIO'S ASSETS	POTENTIAL OPPORTUNITIES	RANKING
Infrastructure to Support Mega and Major Events, including sports facilities	Ability to target Mega and Major sports events that require a variety of venues and accommodation infrastructure in close proximity – maximize venue efficiency while decreasing the requirements for new built infrastructure (i.e., Pan Am Games)	High
Culture and the Arts	Build events on Ontario's Performing Arts Performances and Venues, Ontario's Growing "Showcase" Experiences, Ethnic Diversity, the profile of Ontario's major urban centres	High
Key Economic Clusters	Attract business events to three major business centres (Toronto, Niagara Falls, Ottawa/Gatineau), many destination resorts, and four large Convention Centres	High
Ontario Offers the Best Farmland in Canada	Build on related industry events (i.e., Taste Trail in Prince Edward County, Wine Route in Niagara) and Government strategies (i.e., Ontario Farm Fresh, Culinary Tourism in Ontario – Action Plan)	Medium
Universities and Colleges	Potential to create student sporting events, and academic and business think tanks on various leading-edge research topics.	Medium
Natural Product Diversity	Showcase the Great Lakes, Canadian Shield, Niagara Escarpment, Niagara Falls, Frontenac Arch Biosphere Reserve, etc., through events that make use of these natural products	Low to Medium
Key UNESCO World Heritage Sites and Biosphere Reserves	Build events around existing UNESCO biosphere reserves (4) and World Heritage Site (Fort Henry and Fort York – proposed)	Low

Ontario's primary areas for improvements are the: development of a strategic approach to targeting and developing major events; and, establishment of performance indicators to measure the impacts of festivals and events.

## RECOMMENDATIONS FOR A PROPOSED STRATEGIC FRAMEWORK FOR ONTARIO

### Recommendation 1: Strategic Approach to Targeting and Developing Major Events

It is recommended that the province's **first priority** be to develop a strategic approach to targeting and developing major events that clearly links to Ontario's overall tourism objective of increasing tourism revenue generated.

In developing its strategic approach, it is recommended that Ontario adopt a **two-tier Event Strategy**:

#### Major Events Program

Target, bid on and develop Major Events in Ontario which will:

- Generate substantial economic benefits to Ontario through increased tourist visitation;
- Highlight Ontario as an events and tourism destination through high-profile, national and international television/media coverage; and
- Enhance Ontario's opportunities to host further major events.

#### Emerging Major Festivals and Events Program

Develop and nurture a portfolio of events that will:

- Generate economic benefits for specific regions of Ontario;
- Attract visitors to a region from other parts of the province;
- Enhance the profile and appeal of the host region;
- Inspire and involve local communities; and,
- Build on the potential to transition to events with an international draw.

### Recommendation 2: Ontario's Priorities – Sport, Culture, and Business Events

It is recommended that the province's **second priority** be to identify the types of events it wishes to pursue within its strategic approach to targeting and developing a diversified portfolio of major events.

Based on an assessment of Ontario's current strengths and assets, it is recommended that Ontario focus on the following types of events:

- Major sporting events which are available for hosting/bidding;
- Major cultural events with national and international audiences; and
- Major business events with a potential to draw 10,000 delegates.

### Recommendation 3: Ontario's Priorities – Events by Size

Based on an assessment of Ontario's current strengths and assets, it is recommended that Ontario **build a diversified portfolio of events based on size** with a focus on:

- Attracting one Mega Event every 10+ years;
- Continuing to grow and maintain market share in the Province's Hallmark Events; and,
- Growing those Emerging Events (local and regional events) with the greatest potential to attract out of province visitation to become Hallmark Events.

### Recommendation 4: Ontario's Priorities – Events by Frequency

- Based on an assessment of Ontario's current strengths and assets, it is recommended that Ontario build a **diversified portfolio of events, based on frequency**.
- Hallmark events tend to be recurring (annual or periodically held event within the destination) while mega events are always non-recurring (once in a lifetime events at the destination) within the respective sectors.

### Recommendation 5: Identify Lenses for Assessing Event Opportunities

- It is recommended that the province identify its priority “lenses” which will establish a framework based on a matrix of qualitative and quantitative criteria for assessing major and emerging event opportunities.

#### Recommended Priority “Lenses for Ontario”

Criteria for determining the benefits of major national and international events for Ontario should be based on a matrix of relevant tourism, social, economic and environmental factors – a triple bottom line, including, but not necessarily limited to, the following potential quantitative and qualitative measurements:

<b>Event Profile Lens</b>	<ul style="list-style-type: none"> <li>Event Sector</li> <li>Duration of the Event</li> <li>Frequency of the Event</li> <li>Time of Year Held</li> <li>Media Profile</li> <li>Hosting Decision</li> </ul>
<b>Tourism Lens</b>	<ul style="list-style-type: none"> <li>Tourism Volume and Value</li> <li>Potential to attract national and international markets</li> <li>Product/Experience Fit</li> <li>Regionality</li> </ul>
<b>Economic Lens</b>	<ul style="list-style-type: none"> <li>Contribution to GDP over a specific time frame</li> <li>Job Creation</li> <li>Tax Revenues</li> <li>Operating and Marketing Budget</li> <li>Investment required to host the event</li> <li>Impact Assessment and Cost-Benefit Evaluation</li> <li>Ability to maximize opportunities leading up to and beyond the event</li> </ul>
<b>Infrastructure and Capacity Lens</b>	<ul style="list-style-type: none"> <li>Infrastructure and Capacity Requirements</li> </ul>
<b>Sustainability Lens</b>	<ul style="list-style-type: none"> <li>Event Organizing Team</li> <li>Event Partnerships–foster development of ongoing partnerships and networks amongst key stakeholders</li> <li>Events that Ontario can own and develop and potentially export elsewhere</li> <li>Events that have the ability to maximize opportunities leading up to and beyond the event</li> </ul>
<b>Pride of Place Lens</b>	<ul style="list-style-type: none"> <li>Stimulate sense of civic pride</li> <li>Build volunteer network and encourage community involvement</li> <li>Celebration of diversity and enhanced social cohesion</li> <li>International prestige/destination profile</li> </ul>
<b>Legacy Building Lens</b>	<ul style="list-style-type: none"> <li>Alignment with Economic and Urban Renewal Strategies</li> <li>Sporting Legacy</li> <li>Cultural Legacy</li> <li>Social/Infrastructure Legacy</li> <li>Environmental Legacy</li> <li>Awareness Legacy</li> <li>Business and Technology Legacy</li> </ul>

### **Recommendation 6: Ontario's Funding Priorities – Two-Tier Funding for Festivals and Events**

Best practice research in key comparable jurisdictions to Ontario (with respect to size, urban/rural mix and political structure) suggests that successful jurisdictions have targeted major events separately from smaller, regional and/or local events.

Given these best practice results, and considering Ontario's current strategic goals and existing resources for regional/local festivals and events, it is recommended that the province employ a two-tier funding strategy for festivals and events:

**Tier 1 – Major Events Tourism Funding Program** – To attract, develop and support major festivals and events that generate high levels of tourism revenue.

**Tier 2 – Emerging Major Festival and Event Development Funding Program** – To attract, develop and support emerging festivals and events that have the potential to generate medium to high levels of tourism revenue.

### **Recommendation 7: Suggested Strategic Approaches to Two-Tier Event Strategy**

The assessment and evaluation of event opportunities for Ontario should be done within the framework of Event Tourism Strategies, which are designed to attain the goals of the *Major Event Tourism Strategy* and the *Emerging Major Festivals and Events Development Strategy*. Based on best practice research and the SWOT analysis for Ontario, consideration could be given to researching and developing one or more of the following suggested event strategies for the province. Once strategies are put in place, then policies should be developed in order to implement them.

#### ***Major Events Strategy***

- Urban Renewal Strategy
- Sport Tourism Strategy
- Cultural Renewal Strategy
- Business Event Strategy

#### ***Emerging Major Festival & Event Development Strategy***

- Regional Development Strategy
- Event Incubation Strategy
- Cluster Strategy

### **IMPLEMENTATION CONSIDERATIONS**

The basic premise to the research findings is that some level of government policy or direct intervention in the events sector is both desired and practical. Given our best practice research, it is suggested that the various event public and private sector stakeholders consider undertaking the following roles in developing Ontario's events sector:

#### **Lead Provincial Role**

There is a need for a clear strategy amongst the three levels of government as to which bids to attract and support. As such, the Provincial Government should take a **Lead Facilitation and Equity Partner role** in coordinating partnerships to identify, bid on and host non-recurring Mega and Hallmark Event opportunities in the Sport and Culture sectors as well as Commemorative Events for the Province.

### **DMO Role**

Destination Marketing Organizations should continue to take the **lead role in attracting and sponsoring bids** for any non-recurring event opportunities within the Business sector (i.e., attracting AIDS Conference, G8 Summit, etc.), with the Province providing a supporting Facilitation Role.

### **Host Community/Organization/Venue Role**

Host Community/Organization and/or Venue should continue to take the lead role in **producing** recurring Hallmark Events within the Sport and Culture sectors; producing existing regional and local festivals and events that have the potential to become Hallmark Events and Festivals; and incubating new events and festivals.

### **Supporting Provincial Facilitation Role**

The Province should play a **Facilitation Role** in terms of enhancing existing Hallmark Events, and fostering new ideas for sport, culture and business festivals and events that offer the greatest economic potential and tourism benefits. This role could involve the creation of policies and programs related to funding, marketing, research and benchmarking of these events.

Competitive jurisdictions that have seen growth in their tourism volumes and improvements to their destination profile through major international events have developed a well-defined organizational structure with clear strategic goals and objectives. Given the Ontario Government's strategic priorities and the existing lack of coordinated funding structures and policies around the festival and event industry, it is suggested that MTOUR focus its attention on leadership and coordination, and on defining an action plan to target and enhance tourism-generating major events, with a parallel program to develop Regional/Community festivals which have the potential to become major tourist-generating events.

### **Government Involvement in Bids**

Bidding on international events has become increasingly competitive and expensive. Best practice research in the UK has identified that a great deal of time is required to plan and gain support from financial and political backers in preparing a bid for staging a major event. For many of the world's major sporting events, bids must be submitted several years in advance of the date of the event, and the preparation of bids can start several years before that. Bids or events often fail because insufficient time is allotted for thorough planning and feasibility studies.

Large-scale events like the Olympics or Pan Am Games are normally held in large cities with global level infrastructure, and a population density to support the events. Hence, the attracting, securing and hosting of major international events cannot become the responsibility of one exclusive organization. To successfully win a bid for major international events, there must be a demonstrated willingness and alignment of all governments.

This means governments are a key and necessary actor if large-scale events (or even smaller international scale events) are to be secured and hosted, and partnerships between levels of government, and across government functions, are a necessity if such events are to be secured. Quebec based studies, undertaken by the federal government, point out government contribution levels of 50% and more are not unusual in different countries. World-wide, most jurisdictions, whatever their geographic level of jurisdiction, fund their large scale event underwriting and financial support commitments from general revenues rather than dedicated or "earmarked" revenue sources.

### **Establishing Cost-Sharing Agreements**

It is suggested that the cost-sharing agreements for funding bids for large-scale international events reflect the different capacities that each level of government has to fund bids in some combination with the differential benefits that accrue to residents who are citizens of all three places.

### **Financial Guarantees for Mega Events**

Funding of the bid stage is usually cost-shared between the municipality(ies), the province and the private sector, however prior to bidding on large-scale events, it is also necessary for the municipality (ies) to seek an agreement with other levels of government (province and federal) on a financial guarantee, capital funding framework and a corporate governance structure.

For any large-scale bid, it is necessary to enter into discussions with the provincial and federal governments to secure a financial guarantee that protects the municipality from cost overruns, revenue shortfalls, or any other operating deficits.

### **Creating Sustainable Funding for Events**

In order to address the sustainability of events in Ontario, it is suggested that consideration be given to providing a broader base of funding (i.e., up to three years) provided that the event can successfully meet established event performance measures. As an example from our best practice research, *Tourisme Québec* provides funding for operating budgets of over \$1 Million or more but requires that an economic impact study be produced every three years by an independent firm and that the event demonstrate a level of tourist traffic in accordance with its requirements.



## 1.0 INTRODUCTION

### 1.1 Study Background

Great experiences attract tourists and investment. Ontario's various festivals and events contribute to the quality and diversity of community life for Ontario citizens and tourists, and provide opportunities for public participation, economic activity and tourism. Festivals and events heighten awareness and appreciation of cultural diversity, freedom of cultural expression, civic vitality, history and traditions throughout the province. The economic benefits of festivals and events include increased employment, gross domestic product, tourism, trade, and infrastructure development. Social benefits range from unique work experiences, such as youth and volunteer, to the promotion of civic pride, optimism, enthusiasm and excitement for Ontarians. Ontario's various festivals and events offer a forum to celebrate athletic, artistic and cultural excellence and provide Ontarians with the opportunity to contribute to the expression of their identity.

### 1.2 Study Purpose

As part of the *Ontario Tourism Competitiveness Study*, the Ministry of Tourism retained PKF Consulting in association with Research Resolutions to complete a *Festival and Event Attraction and Support Study* to determine the size of the Ontario festival and event industry, and to review the best practices of other jurisdictions' festival and event attraction and support programs.

The purpose of the Festival and Event Attraction Study is twofold:

1. To assist the Ontario government in better understanding the festival and event sector in Ontario.
2. To provide background support to Ontario government decision-making in: enhancing festivals and events that have the greatest economic potential and other benefits; and, effectively targeting major international festivals and events that have the greatest economic potential for Ontario.

### 1.3 Scope of Study

In completing the subject study, PKF Consulting in association with Research Resolutions undertook the following:

- Developed a working definition of a "major international festival and event" for the purposes of the study.
- Undertook a situational analysis of Ontario's current festivals and events sector focusing on its strengths and areas for improvement.
- Provided an estimate of the size of the Ontario festival and event sector including estimates of the number and type of festivals and events, attendance rates (including local versus visitor), and timing of events.
- Identified the types of major international events available for bidding and hosting, including a 15-year calendar of upcoming major international events and suggested approach to developing a targeted events strategy for Ontario.
- Review of best practices employed by eight international and five Canadian jurisdictions including:
  - Specific programs, policies and practices in place to support festivals and events strategies;
    - How cultural institutions are used to support festivals and events strategies, promote civic pride and attract visitors;

- Programs and practices used to target festivals and events during shoulder and off-peak seasons;
- Lessons learned in the celebration of commemorative events;
- Regional approaches to festivals and events, as well as approaches that are driven by major cities, rather than regions;
- Economic, developmental and socio-cultural impacts;
- Management, sustainability and funding models; and
- Performance measures used by the jurisdiction to determine the short and long-term impacts of festivals and events.

Using the lessons learned and best practices of leading jurisdictions, provided inputs into the development of a strategic framework for Ontario's festivals and events sector.

The following report summarizes our research findings and recommendations.

## 2.0 A WORKING DEFINITION FOR A “MAJOR INTERNATIONAL FESTIVAL OR EVENT”

### 2.1 A Discussion of Working Definitions

In developing a working definition of a *major international festival and event* for purposes of this study, we reviewed definitions used by a variety of jurisdictions and organizations in Canada and elsewhere. Of particular interest in the review were jurisdictions that were considering or had developed a *Tourism Event Strategy*. The focus on operational definitions used by these jurisdictions was deemed appropriate because the overall objective of *Festival and Event Attraction and Support Study* is to provide input to MTOUR for development of a similar type of strategy.

A key finding of this review is that it would be very difficult *to arrive at one universal or standard definition that classifies which types of events are ‘exceptional or special’* although there is some consensus on the defining characteristics of different events.<sup>1</sup>

The most commonly accepted definition of a *special event* at the international level was developed by Donald Getz from the University of Calgary:

*A special event is a one time or infrequently occurring event outside the normal program or activities of the sponsoring or organizing body. To the customer, a special event is an opportunity for a leisure, social, or culture experience outside the normal range of choices or beyond everyday experience.*<sup>2</sup>

Other operational definitions of *events*, including those used by the Ontario Trillium Foundation and the European Union, highlight accessibility to the general public and short duration as key definitional elements:

*First, the festival or event must provide admission to the general public. Admission may be paid or free. Second, the festival or event must be of relatively short duration.*<sup>3</sup>

### 2.2 Do “Festivals” Belong in an Events Tourism Strategy?

Vis à vis other events, *festivals* tend to be regarded as celebrations with more diverse goals. They are commonly associated with a community, with grass roots origins, and with cultural celebrations. They feature comparatively high levels of local community participation. While they may contribute to *events tourism* by attracting tourists, tourism spending and media exposure, they are *less frequently included in the activities of government funded, events agencies because of the larger returns of special events, hallmark and mega-events for a destination.*<sup>4</sup>

Although most theoreticians agree that *festivals* per se are sufficiently local and community-based in nature that they do not qualify as iconic or mega events, these experts also agree that festivals can metamorphose into touristic events. Quinn suggests that *festivals have a social and cultural complexity that is ill-captured in the word “event” but may over time develop a tourism profile as a means of generating revenue.*<sup>5</sup> Obvious examples of these types of events in Ontario that have evolved from community-based to *iconic* events that attract sizeable numbers of tourists include *Caribana, Pride and Toronto International Film Festival*.

Within Northwest England’s *Event Strategy*, the potential transformation of existing local festivals into “world-class events” is described as seeking *Organic Excellence*:<sup>6</sup>

*... events that the Northwest can own, nurture and grow into world-class events that reflect the region’s unique character... existing or proposed events which can evolve and grow to meet the desired economic and other characteristics of the strategy within a reasonable time period. This is felt to be particularly important in the arts, cultural, lifestyle and festivals sector*

*where stakeholders have repeatedly expressed the desire to see homegrown, organic events be given the opportunity to develop rather than importing events from outside the region.*

One avenue being explored to manage the needs and interests of these smaller local arts, culture and heritage festivals or events within a broader strategy is to *bundle them* under one or another umbrella (theme, geography or time) so as to generate greater impact and maximize economies of scale and collective promotions.

Western Australia's *Cultural Tourism Strategy*, promotion of local arts and culture events as *tourism experiences* is conditional on a proven track record and business plan for the future.

*For cultural experiences to be included in tourism itineraries and promotional brochures, they need to be promoted 18 months to two years in advance and be guaranteed to be available for a two to three year period.*<sup>7</sup>

As noted in the Ontario Trillium Foundation's review of numerous Ontario festivals, *organizations with festival in their name that conduct a full program season are excluded from the sample. Both the Stratford Festival and the Shaw Festival fit into this category and are therefore excluded from the study.* These two theatre companies do not meet the "short duration" characteristic implicit in the definition of an *event*. In spite of their names, the Stratford Festival and the Shaw Festival are more analogous to other seasonal tourism attractions in Ontario such as Canada's Wonderland or Marineland than to a planned event or performance venue such as the Mirvish Theatres or the Four Seasons Centre for the Performing Arts.

Regroupement des événements majeurs internationaux (RÉMI) is an association of 20 Québec organizations that have formed an alliance to produce or develop major events that draw international tourists and that generate substantial economic and social benefits (i.e., *Juste pour Rire* is a member). To be a member of this association, an event must take place annually, occur in Quebec, and be international in scope. While the event may be "festive", being a "festival" is not sufficient for membership. (See *Appendix E – Best Practices in Quebec, which includes a list of RÉMI members*).

A review of the Department of Canadian Heritage's (PCH) programs suggests that "festivals" and other culture and arts events are expected to have a strong *local* and *community building* orientation while programs and support associated with sports events and other non-local events have a decidedly *international* orientation: (see *Appendix A for more details*).

*The Building Communities through Arts and Heritage program was created to help you celebrate your community, its past and its present. Eligible events and activities must be local – created by and for your community. They must be open and accessible to the public and strongly encourage and promote the participation of everyone in your community.*

PCH's involvement with sport and international expositions/fairs, on the other hand, is appreciably more international and outward oriented. The federal department maintains a sport policy, actively supports Canadian athletes and amateur sporting organizations and mega-events such as the *2010 Winter Olympic Games*. PCH also has a program that provides policy and support for participation in international expositions such as world fairs (see *Appendix A for more details*).

### **2.3 Does MC&IT Belong in an Events Tourism Strategy?**

In some jurisdictions, Meetings, Conventions and Incentive Travel (MC&IT) falls within an Events Tourism Strategy. At least one determinant in how business tourism is handled relates to the

administrative and jurisdictional relationships between Destination Marketing Organizations (DMOs) and the larger regional/provincial or national tourism organization. If MC&IT is deemed the purview of the municipal DMO, *business events* such as mega-conferences or conventions are not included. In the case of an Australian administrative tourism region, business events are included, but are treated as a stand-alone segment.

As described in the next section, some business-oriented events may be more appropriate than others as components of an Events Tourism Strategy. For example, events that focus on public policy issues (i.e., the *Earth Summit* in Rio de Janeiro or the *AIDS Conference* in Toronto or Mexico City), meetings among political leaders (e.g., G-8 summits) and large scale (10,000+ delegates) association meetings (i.e., *Shriners of North America* or *Alcoholics Anonymous*) would by most accounts fall within an *Events Tourism Strategy*.

## 2.4 Two Approaches to Segmentation

There are two primary ways to segment events: by content and by size.

### Event Content

According to Getz, planned events can be divided into seven categories that are likely to be found in most cultures and communities<sup>8</sup>:

- Cultural celebrations (festivals, carnivals, parades, religious events and heritage commemorations);
- Political and state occasions (visits by important people, political rallies and conventions);
- Arts and entertainment events (concerts, exhibits and award ceremonies);
- Business and trade (meetings, conferences, publicity events, fairs and tradeshows);
- Educational and scientific events (seminars and workshops);
- Sport competitions; and
- Recreational events (sport games rather than formal competitions).

Jurisdictions that have or are developing Event Tourism Strategies seem to mix and match from this list, making strategic selections based largely on available infrastructure, their strategic goals and objectives, and the types of events they believe they can attract.

*Tourism Events Australia* is the product development/marketing arm of the national tourism organization dedicated to marketing Australia as a major events destination. The organization differentiates various types of events by their subject matter: sporting events; cultural events; and, business events (international corporate meetings, incentives, association conferences/conventions and exhibitions).

The European Union (EU) differentiates events that are associated with the following: sport (trips to do sport, attend sport events or visit sport museums or complexes); culture (trips to festivals or other artistic events; trips to study art, folklore, nature, etc.); and, religion.

Business events are *not* included in the EU definition, because like some other jurisdictions, the EU considers “events” to be open to the general public (*actions capable of attracting public flows*).

### Event Size

Planned events are segmented by size, using one or more of the following performance criteria: number of attendees; number of tourists; tourism economic impact; international media exposure; community development, civic pride, and other non-monetary impacts; infrastructure development and other legacy impacts; trade and business development; and/or, increased property values.

## 2.5 Types of Events

### Hallmark or iconic events

The term *hallmark event* and the Ritchie definition of this phrase are widely cited and accepted in academic and business publications. Hallmark events include sports events such as the *Olympics* or *Pan Am Games* and commemorative events such as commemoration of the War of 1812 or Quebec's 400<sup>th</sup> anniversary celebrations.

*Major, one time or recurring events of limited duration, developed primarily to enhance the awareness, appeal and profitability of a tourism destination in the short and/or long term. Such events rely for their success on uniqueness, status or timely significance to create interest and attract attention.*<sup>9</sup>

These *hallmark* or *iconic* events have strong resemblances to Getz's *premier* or *prestige* events.

### Premier or prestige events

Events in this grouping are the top-of-the-genre event. For example, the *World Cup* would be the premier or prestige soccer event. The *Canadian Open Golf Championship* would be Canada's premier or prestige golf event.

### Mega-events

Another commonly used term in the event tourism literature is *mega-event*. These are events of "world importance and profile", yielding *extraordinarily high levels of tourism* and high visibility for the host location. Northwest England's economic development office refers to these events as *Global Giants*. Examples include *Grand National*, *Premiership Football* and *The Open Golf Championships*. *World Fairs* and *Olympics* would also fall into the *mega-event* category.

## 2.6 In Search of a Number or a Phrase

There is no consensus on the absolute value of tourism volume, visitor expenditure, media coverage or economic impact required to constitute a *mega event* but there is general agreement that it is, as noted above, *extraordinary*. Examples of scales used to gauge such an event are displayed below:

- Volume: at least one million visits; psychology: a *must see* event; cost: *more than \$500 million*<sup>10</sup> (Marris, 1987)
- Combined value of media and economic benefits at £1m+.<sup>11</sup>

According to England's Northwest Development Agency, *media benefits* are considered free, short-term publicity for the area. The value of such publicity may be estimated from the promotion expenditure saved and cost of advertising saved. *Economic benefits* are measured by the incremental value added to the Northwest economy. This is an event's contribution to gross regional value added. It is a composite measure of the tourism and commercial benefits proxied by newly injected spending – all new spending consequent upon and legitimately attributable to an event that remains in the Northwest regional economy.<sup>12</sup>

Ontario has adopted various approaches to segmenting events by size. Four examples are provided below:

- Operating expenditure (Ontario Trillium Foundation study, based on information from 97 Ontario events):  
*Small (39 festivals and events with operating expenditures up to \$75,000);  
 Medium (37 festivals and events with operating expenditures between \$75,001 and \$300,000);  
 and  
 Large (21 festivals and events with operating expenditures over \$300,000).*
- Three attendance categories were also used in the Ontario Trillium Foundation study, based on information from 97 Ontario events:  
*Festivals and events with attendance under 10,000, which attract 90% of their visitors from the local community and the remaining 10% from other Ontario communities.  
 Festivals and events with attendance between 10,000 and 20,000 which attract 75% of their visitors from the local community, 20% from other Ontario communities, and 5% from outside of Ontario.  
 Festivals and events with attendance over 20,000, which attract 50% of their visitors from the local community, 40% from other Ontario communities, and 10% from outside of Ontario.*
- For the Celebrate Ontario grant program in 2009, criteria for stratifying events remained unchanged from the two-tier structure of Celebrate Ontario 2008 based on operating budgets:  
**Tier 1** – Festivals or events with operating budgets less than \$1 Million annually; and  
**Tier 2** – Festivals or events with operating budgets in excess of \$1 Million.
- The Ontario Tourism Marketing Partnership Corporation also offers a grant program for festivals and events in Ontario.  
 To qualify for the Tourism Event Marketing Partnership Program (TEMPP), the following criteria for a festival or event must be met:  
*Must take place in the Province of Ontario  
 Must be of considerable interest to a large number of tourists  
 Must be open to the public without pre-registration or membership in a club or group*

Specifically excluded are the following types of events:

*Charitable fundraising events, concerts, meetings, conferences, conventions, investitures, VIP visits, awards ceremonies, seminars, clinics, consumer shows, religious gatherings, anniversaries and commemorative celebrations, and workshops,*

OTMPC has established three funding levels based on an event's marketing budget, duration and other characteristics as summarized below (see *Appendix A for full description*):

#### **Tier 1**

*Funding of up to \$15,000 is available for regional events and festivals with a marketing budget of up to \$50,000 and requesting assistance for marketing activities beyond 100kms from the location of the event or festival.*

#### **Tier 2**

*Funding of up to \$50,000 is available for events and festivals that are two days or longer in duration, and with a marketing budget between \$51,000 and \$170,000 and marketing on a provincial, national or international scale.*

### **Tier 3**

*Funding of up to \$200,000 is available for major international events and festivals that are three days or longer in duration, and with a marketing budget beyond \$170,000.*

- Must generate significant tourism visitation from destinations beyond Canada;
- Must have a minimum attendance of 150,000;
- Must have a media relations component that attracts international media to the event; and
- Provides Ontario Tourism with media/branding opportunities via television, radio, or print advertising.

Noteworthy by its absence in OTMPC's criteria is a quantitative threshold or minimum number of tourists required to achieve Tier 3 or major international event and festivals status. Instead, the criterion associated with *tourists* is quite general: *Must generate significant tourism visitation from destinations beyond Canada.*

As noted previously, Regroupement des événements majeurs internationaux (RÉMI) is an association of Québec organizations that have formed an alliance to produce or develop major events that draw international tourists. Additional definitional requirements for RÉMI membership include the following:

- draw international tourists;
- generate substantial economic and social benefits;
- capitalize on Quebec's uniqueness in the North American context in order to enhance economic benefits in the events industry;
- be annual;
- be considered a "festive event";
- last between 3 – 36 days;
- receive 25,000 audience members (if tickets are required) or 200,000 visitors (if the site is open) over the past two years;
- have an audience of which 15% were tourists and excursionists over the past two years; and
- have a budget of at least \$1 million over the last two years.

The definition cited above is the same as the one used for a "major international event" by the Festivals et Événements Québec (FEQ, equivalent of FEO). It is one of the few definitions that puts a quantitative boundary on the number of tourists that should be attracted to an event (15% for each of the past two years).

There are, in fact, surprisingly few quantitative estimates cited by tourism organizations with event tourism programs or strategies. Instead, these organizations tend to rely on words or phrases that reflect the *larger than life* or *extraordinary* nature of the events they seek to attract. For example, rather than using values, the EU categorizes events by the geographic scope of their impact:

- Mega events. They have a national impact and receive global media coverage (international trade fairs, Football World Cup, Olympic Games, etc.).



- Hallmark [or iconic] events. These events have an impact on the region; they are mainly developed to increase or improve attractiveness, profitability and help the destination be known.
- Micro events. They have an impact on a local level (commune, areas...).

The likely explanation for the tendency to use words rather than numbers is the complexity of the decision-making and evaluation processes. Just as OTMPC and RÉMI developed matrices of variables to stratify events into tiers, so too would other jurisdictions as they evaluate the potential benefit of an event. They might include any or all of the performance criteria cited above (number of attendees, number of tourists, tourism economic impact, international media exposure, non-monetary impacts, etc.) when building the matrix.

In turn, MTOUR seems to have reduced the number of variables taken into account to define and stratify events but has not included a base level of *tourists*. Of the definitions reviewed, it would seem that the one used in Québec (RÉMI) might be superior from an *event tourism* perspective because it makes specific reference to the volume of tourists required to qualify as *événements majeurs internationaux*.

## 2.7 Triple Bottom Line Performance Metrics – Economic, Social and Environmental

A successful *Event Tourism Strategy* will require tools to estimate:

- How many tourists were attracted to specific events;
- How much they spent in the province; and,
- How much of this spending is incremental – spending in Ontario that would not have taken place had the event not occurred.

These tools and the estimates they produce are the critical *performance measures* for tourism events and an *Event Tourism Strategy*.

Of course, there are many other types of variables that a jurisdiction would take into account when determining the financial and other benefits that might accrue from an event or an Event Tourism Strategy. Provincial, regional, municipal, and, where appropriate, national governments might be expected to work in partnership to build evaluation matrices for determining which *tourism events* would be optimal for meeting a variety of interests and needs.

Apart from tourist-generated revenue and activity, Ontario's interests and needs might include the following:

- Traditional economic development objectives such as contribution to GDP, new jobs in the province/community, ongoing tax revenues;
- Non-traditional economic values driven by knowledge, sustainable creativity, innovation and an openness to new ideas;
- Educational objectives such as capacity building, training in areas not currently provided by the location, youth employment programs;
- Transportation infrastructure improvements and/or new roads and transportation systems;
- Entertainment/sports infrastructure improvements and/or construction of new venues;
- Acceleration of community infrastructure needs;
- Civic pride and sense of well-being;
- Generation/maintenance of a volunteer network; and
- Celebration of diversity and enhanced social cohesion.

Whether associated with mega, iconic or other types of events, non-market benefits are not readily measured with any precision: *By their very nature many beneficial characteristics of major events are not precisely measurable.*<sup>13</sup>

As environmental concerns and sustainability become increasingly important to the public, there may be a greater requirement for public institutions to provide reports on the non-monetary as well as the economic impacts of investments in events:

*There appears to be growing unease amongst stakeholders with respect to the sole use of economic impacts as justification for supporting large-scale events. The imperative for government agencies to consider a more holistic approach to the evaluation of events will emanate from funding decisions. In other words, government agencies will increasingly be required to justify their financial support for activities that not only provide economic well-being for the community, but also a sense of pride and harmony and staged within a sustainable environment.*<sup>14</sup>

As noted previously, there is no consensus on the quantitative levels of tourists, economic impact or media exposure required to achieve “mega-event” status. Similarly, there are no “absolute” minimums for the non-market benefits such as those cited above. As with any public policy decision, Ontario and other key stakeholders would review the relevant tourism, social, economic and environmental factors, assign priorities and decide which events maximize the overall benefit to Ontario.

## 2.8 Recommended Definition

Our research has determined that there are various ways to interpret the definition for a *major international festival or event*, depending on a jurisdiction’s priorities and event strategies. There are, however, some common elements in the definitions used in academic, government and industry settings. Our recommendation of definitions to be used in creating a strategic framework for Ontario incorporates these common elements.

The first recommendation is that MTOUR transition from a *Festivals and Events Strategy* to a two-tier strategy. The first tier would be a *Major Events Tourism Strategy*. This strategy would de-emphasize locally oriented community events and emphasize the regional, “iconic” or mega aspect of events and a touristic focus in the strategic planning process. The second tier would focus on locally-oriented *Emerging Regional Festivals & Events* that may have the potential to transition from a local event to one with an international draw.

The second recommendation is that MTOUR use the same sub-categories as do other major jurisdictions for a proposed *Major Events Tourism Strategy*: sporting events; cultural events; and, business events

**Sporting events** are those available for hosting/bidding (e.g., *Pan Am Games*), annual or recurring events that attract international tourists (e.g., *Ottawa’s Bell Capital Cup*), or are the premier sporting event for a particular sport (e.g., *Canadian Open* for golf in Canada).

**Cultural events** are those with international audiences; they are international expositions such as: world fairs, “blockbuster” events (e.g., *Cirque du Soleil*), international exhibitions and heritage commemorations (e.g., Quebec’s 400<sup>th</sup> anniversary celebration). These cultural events include those that have transitioned from local events in Ontario to ones with inter-provincial and/or international stature (e.g., *Caribana, Pride, TIFF*).

**Business events.** As noted above, some jurisdictions with *Event Tourism Strategies* include business events and others do not. The determination of whether to include or exclude mega-conferences or conventions is partly based on the administrative and jurisdictional relationships between Destination Marketing Organization’s and the larger regional/provincial or national tourism organization.

Events that might be included among *business/other* events in a potential Ontario event tourism strategy include large-scale association conventions, loosely defined to be those attracting 10,000+ delegates (e.g., the Shriners). This category could also include public issue-oriented international events such as the *AIDS conference*, and/or high media exposure events such as meetings of the G-8 or meetings linked to scientific or other “think tanks” (e.g., linked to MaRS, the Perimeter Institute for Theoretical Physics, science centres or universities). These events might be sought on the basis of international media exposure rather than on the number of tourists or tourism economic impact they might bring to Ontario.

The third recommendation is that only festivals that have metamorphosed from community-oriented events to ones with an international presence or mega event standard would be included in an *Events Tourism Strategy*.

Such events, described as “cultural events,” would include those on the scale of Toronto’s Caribana, Pride or the Toronto International Film Festival.

A potential *Major Events Tourism Strategy* would not include many of the local and regional festivals supported by the Trillium Foundation or Celebrate Ontario’s 2009 Tier 1 or Tier 2 events. Instead, these festivals and events would be included in a potential *Emerging Major Festivals & Events Strategy*.

A potential *Emerging Major Festival and Event Development Strategy* would identify the characteristics and/or situations in which local festivals could transition from community-based events to ones with an international tourist draw. Such characteristics and/or situations could include a festival’s content and/or growth curve; options available to bundle several smaller festivals temporally or geographically; and/or piggybacking on tourism activity associated with mega events.

The fourth recommendation is that the transitory nature of an “event” be recognized. Thus the Stratford and Shaw Festivals that conduct a full program season would, like Canada’s Wonderland, Marineland, or other performance venues be considered *attractions*. They would be excluded from an *Events Tourism Strategy*.

The fifth recommendation is that the working definition of a *major international event* should rely on semantic rather than numeric measures: in essence, a “major international event” would be one that would be expected to generate an *extraordinarily high level of tourism* and *high visibility for the host location*. An *extraordinarily high level of tourism* would vary in quantity depending on the host location, thus creating a normative definitional environment.

The sixth recommendation is that criteria for determining the benefit of a major international event for Ontario would be based on a matrix of relevant tourism, social, economic and environmental factors – a triple bottom line.

### **3.0 SCOPE OF ONTARIO’S FESTIVALS & EVENTS SECTOR**

#### **3.1 Introduction**

The following section provides an analysis of Ontario’s current festivals and events sector, including an estimate of the overall size of the sector, historic impacts of the industry on Ontario’s tourism sector in comparison with other Canadian jurisdictions, as well as an overview of the Canadian and American market potential for festivals and sporting events.

#### **3.2 Size of the Festivals & Events Sector in Ontario**

There seems to be no list of Ontario's festivals and events that provides comprehensive and accurate *tourism* attendance information on which to estimate the current size of the province's "event tourist" market. Instead, various organizations have compiled lists for various purposes.

The Ontario Tourism Marketing Partnership Corporation (OTMPC) maintains a list of festivals for inclusion in marketing and promotional materials and may retain applications for the Tourism Event Marketing Partnership Program (TEMPP). When obtaining post-event reports, OTMPC requests a total attendance estimate and responses to the following two questions:

1. *Approximately what percentage of visitors originated from markets more than 100 km from the event?*
2. *Did the number of visitors increase or decrease from the previous year?*

For the purposes of this Study, this type of information does not help estimate the *inbound tourist* event market in Ontario.

MTOUR has a list of applicants to the Celebrate Ontario grant program. The program's application forms may provide information about the numbers of tourists who attend each event. For confidentiality reasons, this information was not made available to the consultants. The list of events funded under the Celebrate Ontario program is published on the Ministry's website but does not include attendance/tourist information (see Appendix for list).

Festivals and Events Ontario (FEO). According to Gary Masters, FEO's Executive Director:

*... due-paying membership is approximately 600. Excluding industry suppliers, within our almost 400 festival and event members are numerous associate members, who have multiple celebrations associated with their events. In other words, FEO more accurately represents upwards of 1,000 individual festivals and events annually within Ontario, including the majority of significant and multi-day operations.*

Among the FEO events are "20 celebrations that have indicated to us that they work from a budget in the \$1 million + mark and who attract upwards of 100,000 attendees" (see list appended). However, the estimates of *attendance* displayed in the FEO list do not contribute to an understanding of the size of the *tourism event* market in Ontario.

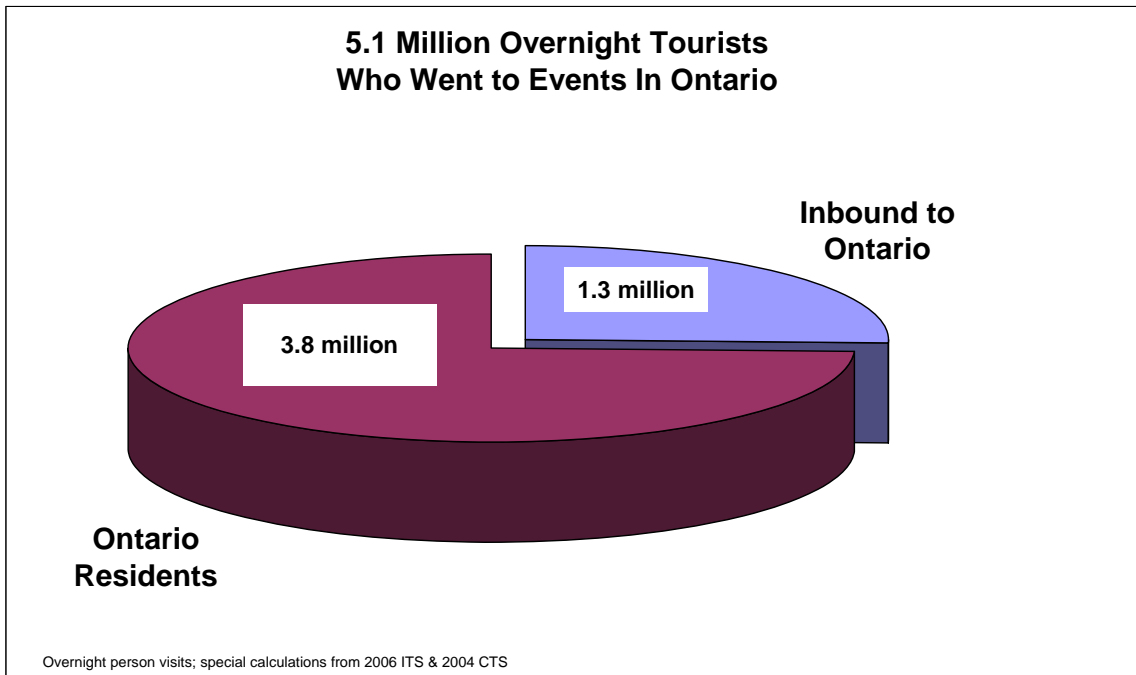
### Estimating the Impact of Festivals and Events in Ontario

In the absence of comprehensive or accurate estimates of tourist attendance available from Ontario's festivals and events or government organizations, we have used Statistics Canada's international and domestic travel surveys as the basis for establishing *order-of-magnitude* estimates of event tourists' volume, spending and economic impact in Ontario.<sup>15</sup>

#### Assumptions for Surrogate Festival and Event Tourism Estimates

1. Overnight tourists only.
2. All nights on the trip had to be in location of interest to reasonably assume that the activity engaged in took place in that location.
3. Activities engaged in: **fairs/festivals** and/or **sporting event**
4. 2006 USA and Overseas data combined with 2004 domestic data.
5. Ontario's TREIM model used to estimate economic impact for Ontario/Toronto CMA.
6. Inbound tourism = residents of provinces *other* than the

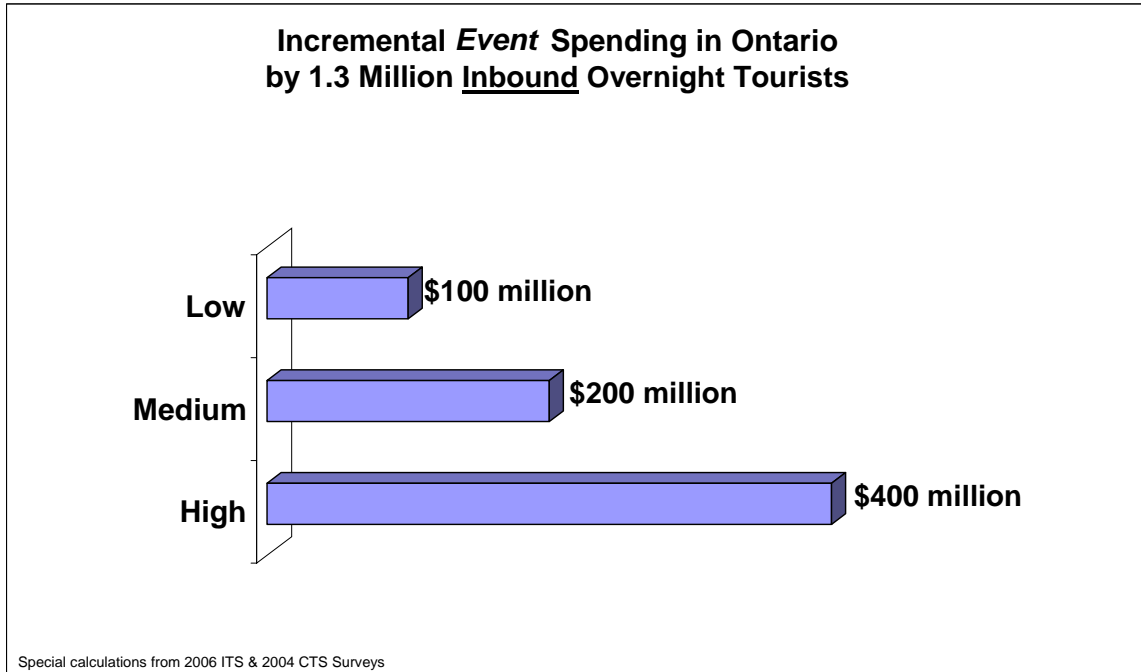
During a typical year, an estimated 5.1 million overnight tourists in Ontario went to festivals and sporting events. About 1.3 million (25%) of these tourists reside in provinces other than Ontario, in the U.S.A. or in other countries. These tourists are referred to as *inbound* and are of particular importance to Ontario because they bring *new* money into the province.



The remaining 3.8 million event tourists are Ontario residents. A very limited amount of spending by these tourists might be considered *import substitution* – money retained in the province because of an event that kept the resident from leaving the province (and spending his/her money elsewhere).

Whether inbound or residents, some tourists go to events as *one-of-many* activities on their trip. For others, the event is a central motivation for making the trip. The extent to which an event contributes to the decision to make the trip to a particular destination is taken into account in establishing how much of the touristic activity, and most notably, touristic spending, is *attributable* to the event.<sup>16</sup>

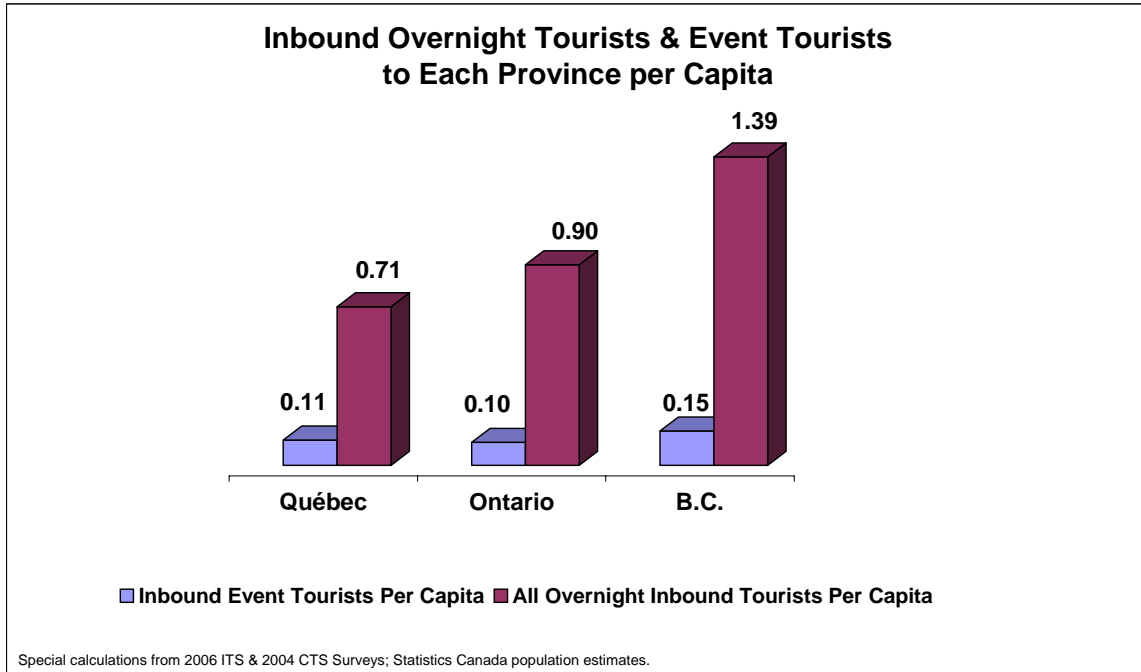
Estimates of event tourism's value to Ontario depend on how much spending by inbound tourists is attributable to events. Using high, medium and low assumptions about the extent to which trips were made *because* of events in Ontario, incremental spending or spending attributable to *events* by inbound tourists would range between \$100 million and \$400 million over the course of a typical year.<sup>17</sup>



At these levels, inbound event tourists' contributions to Ontario would be appreciably smaller than are estimates of *all* tourist spending generated for the *convention sector*. According to HLT/TSW Research, business convention delegates in Ontario spent approximately "\$800 million on accommodation, food and beverage, recreation and entertainment facilities, and transportation service providers". The estimate of convention spending likely includes both resident and non-resident spending and assumes that *all* spending on convention trips is incremental.<sup>18</sup>

### Comparison of Three Provinces and Three Cities

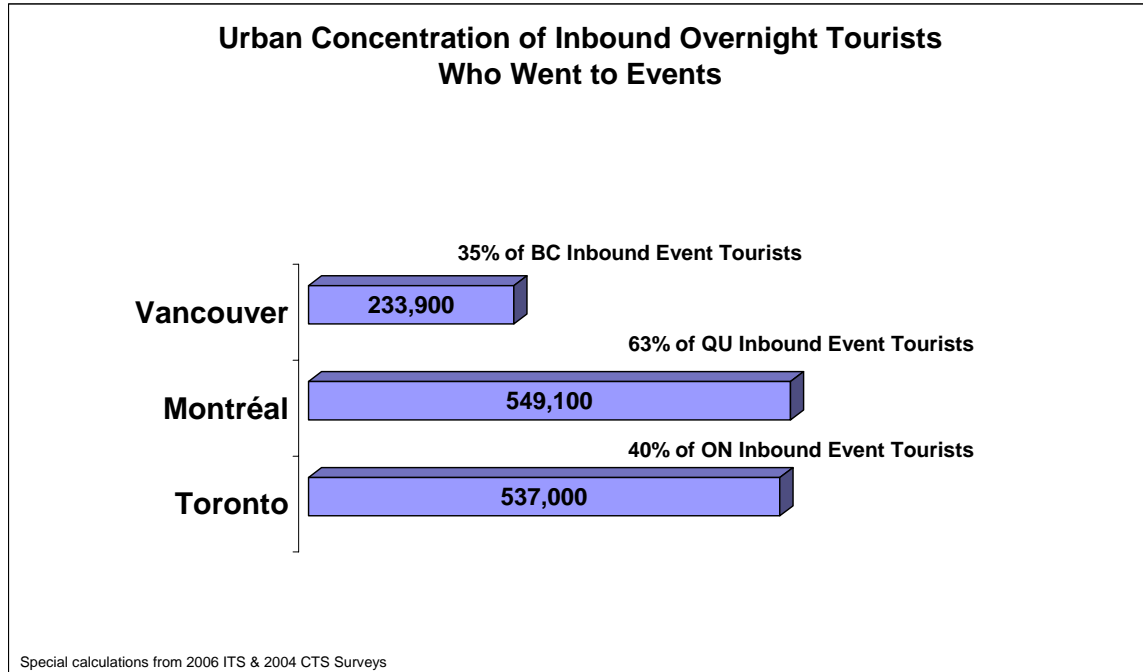
To put Ontario's event tourism market in context with other major Canadian tourism destinations, the same calculations were performed for the Provinces of Québec and British Columbia and the major city in each of the three provinces. As Canada's largest province and the one that attracts more domestic and foreign tourists than any other, Ontario captures inbound *event tourists* at about the same rate (.10) as does Quebec (.11) but at a lower rate per capita than does British Columbia (.15).



Possibly because of a perceived link between cultural identity and events, the Province of Québec has a comparatively large and aggressive event development, marketing and support program. The impact of this provincial and federal support seems manifest in the relative strength of the event market (.11 per capita) compared to *all* inbound overnight tourists to the province (.71 per capita). Ontario attracts *inbound overnight tourists* at a higher rate per capita (.90) than does Québec (.71) but is no more successful in attracting inbound event tourists. On a per capita basis, British Columbia is especially successful in attracting inbound overnight tourists (1.39) and inbound overnight event tourists (.15).

A goal for a potential Ontario Event Tourism Strategy could be to increase the share of inbound *event* trips to the province to the level currently achieved in Quebec or British Columbia. To move from the current Ontario per capita rate (.10) to Quebec's (.11) would require an increase of about 131,000 overnight event tourists from other provinces, the U.S.A. and/or other countries. To reach British Columbia's per capita rate (.15) would require an increase of about 650,000 inbound overnight event tourists.

As the venue for many of Québec's major festivals, Montréal is especially successful in attracting inbound tourists. Of the 876,000 inbound event tourists to Québec over a typical year, Montréal attracts 549,100 or 63%. The support accorded events in Québec and the concentration of major events in Montréal (*Just For Laughs Festival, International Montréal Jazz Festival, Francofolies, Grand Prix, etc.*) likely explains how this city attracts more inbound event tourists (549,100) than does Toronto (537,000) in spite of the much larger inbound event market drawn to Ontario (1.3 million) than to Québec (877,000).



### 3.3 What TAMS Can Offer: Market Potential for Festivals and Sporting Events

#### Popularity of Selective Sporting Events/Festivals among US & Canadian Tourists

Order-of-magnitude estimates of potential market share among Americans and Canadians travelling for various types of festivals and events can be extracted from the Travel Activity and Motivation Study conducted in 2006 (TAMS). It is assumed that pleasure travellers who named an event or activity as the *main reason* for one of their trips over a two-year period are the best surrogate TAMS can offer for estimating market size for various types of events. Tables provided herein also display the number of American and Canadian adult overnight pleasure tourists who claimed to attend each of a highly idiosyncratic list of activities as *one-among-many* on a trip over the past two years (*any*). The activities displayed here are only those available in reports published on the MTOUR website. As a potential strategy for tourism events and/or festivals is developed, customized information on a much broader list of activities would likely prove beneficial. For example, TAMS could provide market size and characteristics information for American and Canadian tourists who attend each of the following types of events while travelling:

Carnivals	Aboriginal festivals and events (e.g., Pow Wows)
International film festivals	Amateur sports tournaments and competitions
Literary festivals or events	Amateur tournaments and competitions (other)
Music festivals	Auto races
Theatre festivals	Professional baseball games
Farmers' markets or country fairs	Professional basketball games
Exhibitions or fairs	Professional figure skating
Religious festivals	Professional football games
Food/drink festivals	Professional golf tournaments
Ethnic festivals	Professional ice hockey games
Western theme events, such as rodeos	Professional soccer games
Gay Pride parades	Horse races
Firework displays	Equine (horse) competitions
Hot air balloon festivals	Curling bonspiel
Comedy festivals	National/international sporting events (e.g., Olympics)



In the future, MTOUR might consider undertaking customized analysis of TAMS to more closely approximate areas of interest that emerge from the *Competitiveness Study*. For example, to estimate the size of the domestic market for various types of festivals and events, it would be appropriate to exclude Ontario residents (they are not “tourists” in their own province from an overall provincial economic impact perspective). Similarly, behavioural, demographic and attitudinal profiles of the U.S. and Canadian markets for various types of events could be extracted from TAMS, once the types of events that might be pursued have been determined.

### **Examples of Events of Interest to American Tourists**

#### **Sports Events**

Almost half a million American adults say they took a trip over a two-year period on which the *main activity* was to attend a national or international sporting event such as the *Pan Am Games*, *the Olympics*, etc. Of course, they would not all be attracted to a particular *type* of sporting event, nor would they necessarily be inclined to travel to an event in Ontario.

Of the 468,500 American overnight pleasure travellers in the market for international or national sporting events, only about 60,900 (13%) have been on trips to any Canadian destination, and half of these (32,800 or 7%) have visited an Ontario destination over a two-year period.

At approximately 582,000 Americans, the market size for professional **soccer** is marginally higher than for professional figure skating competitions. Only about 60,000 to 70,000 of these potential tourists have recent Canadian travel experience.

#### **Other Events**

The audience potential for many of the “festivals” listed in the TAMS survey is appreciably larger than those for the sporting events included in the survey. As noted in the review of operational definitions, many festivals are regional or local in nature. They do not necessarily require the traveller to go too far from home and, as a consequence, may have broader appeal and larger tourist markets.

About five million American tourists would be in the market for music and/or food/drink festivals and about half this number have taken trips where ethnic festivals was the main activity (2.6 million). Theatre festivals are trip drivers for about one million American tourists (983,000) and over one-half million take trips in order to go to international film festivals (693,000), literary festivals (582,000) and/or comedy festivals (500,000).

Ontario offers festivals in most of these categories. Assuming that audiences for these festivals exhibit the same propensity to travel to the province as does the U.S. travel market as a whole (7%), the themes most apt to lure Americans to Ontario are those associated with food and drink (343,000) or music (351,000).

US Pleasure Travel Market: Examples of Sports & Other Event Activities on Trips	Any Activity on Trip	Main Activity on Trip		
		Total	To Canada Past 2 Years	To Ontario Past 2 Years
<i>Adult Pleasure Travellers, Past 2 Years</i>				
<b>EXAMPLES – SPORTS</b>				
National/international sporting event (e.g., Olympic Games)	819,100	468,500	60,900	32,800
Curling bonspiel	142,300	59,200	7,700	4,100
Professional figure skating	1,112,800	521,900	67,800	36,500
Professional soccer	1,508,700	582,300	75,700	40,800
<b>EXAMPLES – EVENTS/FESTIVALS</b>				
Food/drink festivals	16,960,100	4,901,500	637,200	343,100
Ethnic festivals	9,192,400	2,629,000	341,800	184,000
Music festivals	10,572,800	5,011,500	651,500	350,800
Theatre festival	2,573,700	983,200	127,800	68,800
Comedy festival	1,695,800	500,300	65,000	35,000
Int'l film festival	1,626,496	692,900	90,100	48,500
Literary festival or event	1,566,700	582,800	75,800	40,800
Exhibitions or fairs	18,300,500	5,618,200	730,400	393,300

Source: TAMS 2006, Calculated from data provided in MTOUR Activity Profile Reports. Figures are rounded to nearest 100.

### **Examples of Events of Interest to Canadian Tourists**

The Canadian tourist market as a whole and for special events are appreciably smaller than those in the U.S. It is also important to note that the estimates provided here include Ontario residents. If these travellers were attending special events in their own province, their trip spending might not be considered incremental to the province. In other words, as residents, they do not bring new spending to Ontario. At the same time, depending on the assumptions being used, some or all of their spending might be regarded as import substitution (dollars that were kept in the province rather than being spent at a destination elsewhere).

#### **Sports Events**

Clearly, curling has more cache among Canadians than it does among American travellers. About 170,000 adults might be motivated to attend bonspiel – appreciably more than would take a trip to go to a national or international sporting event such as the *Olympics* or to professional figure skating competitions. Including Ontario residents, about half of these sporting-event oriented tourists have taken an overnight pleasure trip within Ontario over the two-year time period.

#### **Other Events**

As with the Americans, the Canadian audience potential for most of the “festivals” listed in the TAMS survey is appreciably larger than those for the sporting events. About one-half million Canadian tourists would be in the market for a music festival while about half this number have taken trips where a food/drink, ethnic and/or theatre festival was the main activity.

Canadian Pleasure Travel Market: Examples of Sports & Other Event Activities on Trips	Any Activity on Trip		<i>Main Activity on Trip</i>
	Total	Total	To Ontario Past 2 Years
<i>Adult Pleasure Travellers, Past 2 Years – Main Activity on Trip</i>	18,439,508	18,439,508	8,297,779
<b>EXAMPLES – SPORTS</b>			
National/international sporting event (e.g., Olympic Games)	177,200	93,700	42,200
Curling bonspiel	304,700	170,400	76,700
Professional figure skating	136,800	51,300	23,100
<b>EXAMPLES – EVENTS/FESTIVALS</b>			
Food/drink festivals	1,027,600	245,600	110,500
Ethnic festivals	795,300	240,200	108,100
Music festivals	1,354,000	563,300	253,500
Theatre festival	438,000	205,400	92,400
Comedy festival	328,600	104,500	47,000
Int'l film festival	325,900	77,900	35,100
Literary festival or event	206,700	72,100	32,500
Exhibitions or fairs	2,138,600	682,200	307,000

Source: TAMS 2006, Calculated from data provided in MTOUR Activity Profile Reports. Figures are rounded to nearest 100. "Professional soccer" was not included in the Canada report.

## 4.0 AN OVERVIEW OF ONTARIO'S MAJOR INTERNATIONAL FESTIVALS AND EVENTS

### 4.1 Introduction

The following section provides an overview of some of the major international festivals and events that Ontario has hosted in the past or is currently hosting, as well as the unsuccessful bids, within the defined Major Event sub-categories:

- Sporting events
- Cultural events
- Business events

### 4.2 Major Sporting Events & Competitions

Within the last 20 years, Ontario has played host to a number of major sporting events and competitions however, it has lost two high profile *Olympic* bids and a previous bid for the *Pan Am Games*. The successful events have varied from recurring national events held at the same venue, to major events that required a rigorous bidding process to win the rights to host.

#### Current Major Sporting Events

During the calendar year, 2008, Ontario will have hosted an estimated 14 major sporting events, including:

##### ***Rogers Cup Men's & Women's Tennis Tournaments***

*Rogers Cup Tennis* includes a pair of men's and women's professional tennis tournaments held annually both in Toronto and Montreal. The men and women rotate venues on an annual basis with the men playing in Toronto in even years and the women playing in Toronto in odd years. In 2004, the Rogers Cup men's event in Toronto attracted over 165,000 spectators.

##### ***Canadian Open Men's & Women's Golf Tournaments***

Similar to the *Rogers Cup*, the *Canadian Open* pair of professional men's and women's golf tournaments. Both tournaments are held on an annual basis and held at upscale golf clubs across Canada. In 2008, the men's tournament was held at Glen Abbey Golf Course in Oakville, while the women's tournament was held at the Ottawa Hunt and Golf Club in Ottawa. The men's tournament has also been held in Oakville, Markham and Ancaster. The women's tournament has been held in London, Niagara and Markham. In 2007, the men's event attracted 91,065 spectators.

##### ***Queen's Plate***

The *Queen's Plate* is North America's oldest thoroughbred race, which is run annually at Woodbine Racetrack in Toronto.

##### ***Bell Capital Cup***

The *Bell Capital Cup* is an annual hockey tournament held in Ottawa that draws in youth hockey teams aged 9 to 13 from all over the world. In 2007, the tournament had 510 teams and 8,145 players. An economic impact study performed by the Sports Tourism Alliance of Canada on the 2005 *Bell Capital Cup* indicated that the event generated approximately \$11.1 million in economic activity, resulting in a net GDP increase of over \$3.5 million for the Ottawa area.

##### ***Buffalo Bills Football***

Rogers teamed up with the Buffalo Bills to play one exhibition and one regular season football game in the City of Toronto. This is the first time a regular season NFL game has been played in Ontario.

### ***MLS Soccer All-Star Game***

Since the league's inception in 1996, the 13<sup>th</sup> Major League Soccer all-star game was held in at Toronto's newly constructed BMO field. This year is the only time the MLS All-Star Game has been held in Ontario.

Other major sporting events held in Ontario in 2008 include:

- Wakestock (Toronto);
- Ontario Winter Games (Collingwood);
- Ottawa Dragon Boat Race Festival (Ottawa);
- Royal Canadian Henley Regatta (St. Catharines);
- Ontario Summer Games (Ottawa); and
- Ontario Senior Games (London).

### **Upcoming Major Sporting Events in Ontario**

Major sporting events that are scheduled to be hosted in 2009 in Ontario include:

- 2009 FIBA U21 World Basketball Championship – Men (Toronto);
- 2009 North American Roller Hockey Championship (Toronto);
- 2009 World Baseball Classic (Toronto);
- 2009 IIHF World Junior Hockey Championships (Ottawa);
- 2009 Canadian Open Men's Golf Tournament (Oakville);
- 2009 Rogers Cup Tennis Championship (Toronto);
- Queens Plate (Toronto);
- Wakestock (Toronto);
- 2009 Ontario Senior Games – Winterfest (Brockville);
- Grand Price of Toronto (Toronto);
- Ottawa Dragon Boat Festival (Ottawa);
- Bell Capital Cup (Ottawa); and
- Royal Canadian Henley Regatta (St. Catharines).

### **Historic Major Sporting Events in Ontario**

Other significant sporting events held in the Province over the past 20 years, include:

#### ***Breeder's Cup World Championship***

The *Breeder's Cup World Championship* is a prestigious annual horse race that takes place in a different city every year. The Breeder's Cup has only taken place in one city outside of the United States and that was at Woodbine Racetrack in Toronto in 1996.

#### ***FIFA U21 World Cup***

The *FIFA U21 World Cup* is one of the largest sporting events ever held in Canada. The tournament ran from June 30, 2007 to July 22, 2007 and was hosted in multiple cities across Canada. It is the first time a FIFA World Cup event has ever been hosted in Canada. The host cities in Ontario were Toronto and Ottawa.

#### ***Toronto Grand-Prix***

The *Toronto Grand Prix* was formerly known as the Molson Indy Toronto. The event was an annual race that took place in downtown Toronto. In 2008, the event was cancelled due to the unification of the Champ Car and Indy Race Leagues. However, it is planned to return to Toronto in 2009.

#### ***International Math Olympiad***

The *International Math Olympiad* is a world math competition that was started in 1959 with 7 participating countries. Today, the competition has participants from over 90 countries. The competition has only been held in Ontario once, in North York in 1995.

### ***World Men's and Women's Curling Championships***

Although the *World Men's and World Women's Curling Championships* are now two separate events held at different venues, both of these events were held together in Hamilton in 1996. The men's championship has also been held in London in 1981 and Toronto in 1986. Hamilton is the only venue in Ontario that the *World Women's Curling Championship* has been held.

### ***World Junior Curling Championships***

The *World Junior Curling Championships* are opposite to the *World Men's and Women's Curling Championships* in that both the men and women's tournaments are combined into one event. The *World Junior Championships* has only once been held in Ontario in Thunder Bay 1998. The event has been held four other times in other provinces in Canada.

### ***Scott Tournament of Hearts***

The *Scott Tournament of Hearts* is Canada's women's national curling championship. The *Scott Tournament* is hosted annually at a different location within Canada. Since 1990, the *Scott Tournament* has been held in Ontario six times, most recently in London in 2006. Other venues have included Ottawa in 1990, Kitchener in 1994 and 2003, Thunder Bay in 1996 and Sudbury in 2001.

### ***The Brier***

Opposite to the *Scott Tournament of Hearts*, the *Brier* is Canada's men's national curling championship. *The Brier* is hosted in a different location within Canada annually. Since 1990, Ontario has hosted *The Brier* five times, most recently in Hamilton in 2007. In that year, the event drew in 107,199 spectators well below the event's attendance record of 281,985 spectators when it was held in Edmonton in 2005.

### ***IIHF World U20 Championships***

The *IIHF World U20 Championships* are the men's world under 20 hockey championships. These championships were last held in Ontario in Hamilton in 1986 and are planned to return to Ontario in 2009, where it will be held in Ottawa.

### ***IIHF World Women's Championships***

The *IIHF World Women's Championships* is the world hockey championships for women. The championships have been held in Ontario three times, most recently in Mississauga in 2000. The championships were also previously held in Kitchener in 1997 and Ottawa in 1990.

### ***ISU World Figure Skating Championships***

The *ISU World Figure Skating Championships* have been held in Ontario on two occasions both in the City of Ottawa. The event has not been hosted in Ontario for over 20 years with the last time being 1984.

### ***ISU World Junior Figure Skating Championships***

The *ISU World Junior Figure Skating Championships* have been held in Ontario three times, once in London in 1981 and twice in Kitchener in 1987 and 2005.

### ***ISU World Synchronized Skating Championships***

The *ISU World Synchronized Skating Championships* was first held in Ontario in 2003 where it was held in Ottawa. More recently the event was held in London in 2007.

### ***Four Continents Figure Skating Championships***

The *Four Continents Figure Skating Championships* is an international figure skating event. The event rotates between international cities and has only been held in Ontario once, in Hamilton in 2004.

**World Judo Championships**

The *World Judo Championships* are held every two years on odd years. The event has only once been held in Canada and that was in Hamilton in 1993.

**UCI Road World Championships**

The *UCI Road World Championships* have also been only held in Ontario on one occasion. The championship took place in Hamilton in 2003. The only other time the event has been held in Canada was in Montreal in 1974.

**World Master's Games**

The *World Master's Games* is an international multi-sport event, which takes place every four years. The first event took place, and the only time it has been hosted in Ontario, was in Toronto in 1985, where 8,305 people participated in the games. The event has been held once more in Canada when it was held in Edmonton in 2005 and attracted over 21,000 participants.

**World Rowing Championships**

The *World Rowing Championships* have been held twice in Ontario. On both occasions, 1970 and 1999, the championships were held in St. Catharines.

**IAAF Indoor Championships**

The *World Indoor Track and Field Championships* have been held once in Ontario. The championships were held in Toronto at the Rogers Centre in 1993.

**Grey Cup**

The *Grey Cup* is the Canadian Football League's championship game. The *Grey Cup* rotates between Canadian host cities annually and was last held in Ontario in 2007 in Toronto. In that year, the event attracted over 50,000 spectators.

**MLB All-Star Game**

The *Major League Baseball All Star* game was held in 2001, only 2 years after the construction of the Sky Dome (now the Rogers Centre). The all-star game is held at a different host stadium across the league annually and has only been held in Canada one time before, in Montreal in 1982.

**NHL All-Star Game**

Since 1990, the *NHL All-Star* game has been held twice in Canada (once in Ontario in 2000 and Montreal in 1993). The game is held at different host arenas across the league annually and will be held in Montreal in 2009.

**Current Bid****2015 Pan Am Games**

The City of Toronto and 11 other municipalities within the Golden Horseshoe are currently in the process of bidding on the 2015 Pan Am Games. The games are expected to draw in approximately 7,500 athletes from 42 countries, with a further 250,000 tourists coming into the area. The estimated price tag to host the games is \$1.77 billion, with funding support by all three levels of government.

**Unsuccessful Bids**

Following is a summary of significant sporting events that Ontario has unsuccessfully bid on:

**2012 World Junior Hockey Championships**

In August 2008, Hockey Canada announced that Toronto had lost their bid to host the 2012 World Junior Hockey Championships. The championship was awarded to Calgary and Edmonton. The event had been held once before in Ontario in Hamilton in 1986 and will be held in Ottawa in 2009.

### **2008 Summer Olympics**

In July 2001, the International Olympic Committee awarded the 2008 Summer Olympics to Beijing, China. This was the second time that Toronto had been unsuccessful in winning a bid to host the Summer Olympics.

### **1996 Summer Olympics**

In September 1990, the International Olympic Committee awarded the 1996 Summer Olympic Games to Atlanta, GA. Canada has played host to two previous Olympics Games, once in 1976 in Montreal and another time in 1988 in Calgary. The Olympics will be held in Canada for a third time in 2010, as Vancouver won their bid to host the Winter games.

## **4.3 Major Cultural Festivals and Events**

Ontario offers a number of major recurring festivals throughout the province, and has hosted several one-time cultural events over the past 20 years. The following is a brief description of some of Ontario's major cultural events.

### **Recurring Cultural Festivals and Events**

#### ***Toronto International Film Festival***

Since its inception in 1976, the *Toronto International Film Festival* (TIFF) has become one of the most important international festivals in Ontario, and in Canada as a whole, and is considered to be one of the most prestigious international film festivals globally. The annual festival, held each September, brings together over 500 special guests and stars, close to one thousand international members of the media, and in 2007 drew over 340,000 admissions, from both the public and industry. TIFF is the flagship event of the Toronto International Film Festival Group, a charitable, not-for profit cultural organization.

#### ***Pride Week***

*Pride Week* in Toronto is one of Canada's leading cultural festivals and one of six of the largest Pride celebrations worldwide. Hosted by Pride Toronto, a not-for-profit organization, the annual event runs for ten days in the last week of June.

#### ***Toronto Caribbean Carnival (Caribana)***

Toronto has been host to the *Caribana Festival and Parade* for over 40 years. Toronto's Caribana began in 1967 and was originally based on the Trinidad Carnival, but now celebrates the many other Caribbean and South American cultures represented in Toronto. The festival takes place annually in July and August. With support provided by the Ministry of Tourism, an economic impact assessment of the *2008 Caribana Festival and Parade* is currently being undertaken.

***LuminaTO – Toronto's Festival of Arts and Creativity*** has been held for the past two years in June, and is Ontario's first international multidisciplinary arts festival. The first festival in 2007 featured 100 events, including 10 world premieres, and 3 Canadian premieres. *LuminaTO*'s program encompasses a broad spectrum of creative expression including music, dance, theatre, film, literature, visual arts and lectures.

With regard to sponsorship, *LuminaTO* receives a variety of public and private funds. As an example, L'Oreal is the festival's "Partner in Creativity," and it receives funds from the Department of Canadian Heritage, however the major funding partner is the Ontario Government. In 2008, *LuminaTO* received \$15 Million from the province to "promote future growth, adding to Toronto's reputation as a world-class cultural centre."<sup>19</sup>

#### ***Kitchener-Waterloo Oktoberfest***



*Kitchener-Waterloo Oktoberfest* has been celebrated annually since 1969. The nine-day Bavarian cultural festival attracts an estimated 700,000 participants and is the 2<sup>nd</sup> largest Bavarian festival in the world, next to Munich.

### ***Winterlude***

*Winterlude* is an annual winter celebration held in Ottawa held over the first three weekends of February. In 2007, *Winterlude* set a new attendance record of an estimated 1.6 million visits to at least one of the four major sites.

## **One-Time Events & Exhibitions**

### ***Barnes Exhibit***

The *Barnes Exhibit*, considered to be one of the finest collections of impressionist and post-impressionist paintings was shown at the Art Gallery of Ontario from September to December of 1994. The exhibit was highly successful, having sold 597,000 tickets in which 60% of ticket buyers were from outside of the Metro Toronto area.

### ***World Youth Day***

The 17<sup>th</sup> World Youth Day was held in Toronto's Downsview Park from July 23 – 28, 2002. The Catholic Youth Festival had 176,100 registered to participate, and drew in 800,000 people for an overnight vigil and papal mass.

### ***Molson Canadian Rocks for Toronto (SARSStock)***

The Molson Canadian Rocks for Toronto (SARSStock) was a benefit held as a way to counter the negative effects of the SARS outbreak on Toronto's economy and reputation as a destination for tourists. The concert was held July 30, 2003 at Downsview Park and attracted over 450,000 people.

### ***Kalachakra for World Peace (Dali Lama Visit) 2004***

From April 25 to May 5, 2004, the Canadian Tibetan Association of Ontario and the Kalachakra Organizing Committee organized a visit from the Dali Lama to promote world peace. The event was held at the Rogers Centre in Toronto.

## **Current Bid**

### ***2017 World's Fair***

The City of Ottawa is in the process of bidding on the *2017 World's Fair*.

## **Unsuccessful Bids**

Below is a summary of the major cultural festivals and events that cities in Ontario have been unsuccessful in bidding on:

### ***2015 World's Fair***

In November 2006, Toronto opted not to submit a bid to host the 2015 World's Fair. According to the City of Toronto, the event would have attracted 22 million visitors to the City and would have cost \$5.4 billion to build.

### ***2000 World's Fair***

Toronto was unsuccessful in winning its bid to host the *2000 World's Fair*. The event was awarded to Hanover, Germany. World's Fairs have been held twice in Canada, once in Montreal in 1967 and once in Vancouver in 1986.

## **4.4 Business Events**

Ontario has hosted few events that fit the minimum criteria of attracting 10,000 delegates and/or high media exposure such as meetings of the G-8 Summit. This section outlines major upcoming and historic business events in Ontario that fit this criterion:

### **Upcoming Major Business Events in Ontario**

#### ***American Industrial Hygiene Association Annual Conference***

Toronto, May 26 to June 7, 2009 (10,000 delegates)

#### ***American Psychological Association Annual Conference***

Toronto, August 3 to August 10, 2009 (10,000 delegates)

Toronto, August 1 to August 9, 2015 (15,000 delegates)

#### ***National Society of Black Engineers National Convention***

Toronto, March 13 to March 22, 2010 (10,000 delegates)

#### ***American Academy of Neurology Annual Meeting***

Toronto, April 7 to April 19, 2010 (10,000 delegates)

#### ***American College of Physicians Annual Conference***

Toronto, April 15 to April 28, 2010 (16,000 delegates)

#### ***Shriners – Imperial Council Sessions***

Toronto, June 25 to July 9, 2010 (20,000 delegates). This same event was held in Toronto in 2005.

#### ***G8 Summit***

The G8 Summit has been hosted in Canada twice, once in 1995 in Halifax, and once in 2002 in Kananaskis, Alberta. The annual summit brings together leaders of the G8 countries (Canada, France, United States, United Kingdom, Russia, Germany, Japan, and Italy) in order to develop common approaches to urgent global issues. The Deerhurst Inn in Huntsville has been announced as the host of the 2010 G8 summit.

#### ***American Bar Association***

Toronto, August 4 to August 11, 2011 (20,000 delegates)

Toronto, August 1 to 13, 2020 (20,000 delegates)

#### ***US Green Building Council***

Toronto, October 1 to October 9, 2011 (25,000 delegates)

#### ***Barbershop Harmony Society***

Toronto, June 30 to July 7, 2013 (11,000 delegates)

#### ***American Psychiatric Association***

Toronto, May 10 to May 24, 2015 (20,000 delegates)

#### ***American Institute of Architects***

Toronto, June 1 to June 14, 2017 (25,000 delegates)

### **Historic Major Business Events in Ontario**

### **International AIDS Conference**

The XVI International AIDS Conference was held in Toronto from August 13-18, 2006. It attracted more than 15,000 delegates representing 187 countries.

Other major historic business events with over 10,000 delegates that were held in Ontario include:

- *American Psychological Association Annual Meeting* (Toronto, 1996)
- *Fan Expo Canada* (Toronto, 2008)
- *National Model Railroad Association Annual Meeting* (Toronto, 2003)
- *Seventh Day Adventist General Conference Session* (Toronto, 2000)
- *Microsoft Corporation Global Summit* (Toronto, 2004)
- *American Water Works Association Annual Conference and Exposition* (Toronto, 2007)
- *International Biotechnology Industry Organization Meeting* (Toronto, 2002)
- *Joyce Meyer Ministries: Life in the World* (Toronto, 2003)
- *American Library Association Summer Meeting* (Toronto, 2003)
- *Shriners Imperial Council Session* (Toronto, 2005)
- *Alcoholic Anonymous International Convention* (Toronto, 2005)
- *American Society for Microbiology (ASM) General Meeting* (Toronto, 2007)
- *Annual Convention of the International Reading Association* (Toronto, 2007)
- *American Thoracic International Conference* (Toronto, 2008)
- *Annual Meeting of the American Psychiatric Association* (Toronto, 2006)
- *National Tour Association Annual Meeting* (Toronto, 2004)
- *International Foundation of Employee Benefit Plans Annual Fall North Meeting* (Toronto, 2002)
- *National Association of the Education of Young Children Annual Meeting* (Toronto 1998)
- *World Diabetes Congress* (Toronto, 1964)
- *International Association of Chiefs of Police Annual Conference* (Toronto, 2001)
- *United Pentecostal* (Toronto, 2003)

### **4.5 Summary**

Historically, Ontario has been more successful at attracting single sport events and championships at the national and international level, than it has been at attracting and hosting mega-events like the *Olympics*. However, there is potential for hosting such large-scale events, given appropriate levels of investment in both the bidding process and associated infrastructure and resources.

Ontario offers approximately five festivals that have grown over the past 20+ years to become major international events, and draw tourists from outside the province, along with one major festival that was created in the past three years through a special provincial fund to celebrate the Arts. Historically, Ontario has featured a very limited sprinkling of one-time events that could be considered “blockbusters”.

Large-scale international conventions are primarily hosted by the City of Toronto, and sourced by the DMO in partnership with the event venue(s). On average, since 1995, Toronto has historically attracted one to two conventions of more than 10,000 delegates per year, with a total of 13 more on the books for the next 15 years.

## 5.0 CURRENT SITUATIONAL ANALYSIS: A REVIEW OF STRATEGIES, PROGRAMS & POLICIES TO SUPPORT ONTARIO'S FESTIVALS & EVENTS

### 5.1 Introduction

This section reviews existing strategies, policies and programs in place by various municipalities and non-profit entities operating within Ontario that support Ontario's festival and event sector.

### 5.2 A Review of Previous Studies

Since 2001, there have been three research studies that have been prepared on behalf of the Ontario Ministry of Tourism addressing Ontario's strategy for hosting of festivals and events.

The first study, *Ontario Sport Tourism: Competing to Win*, was prepared in November 2001 by Economic Growth Solutions Inc., in association with Lynn Morrow Consulting<sup>20</sup>. The purpose of this study was to review Ontario's approach to sport tourism. The primary conclusion was that Ontario needs to develop an organized framework, complementary to the Canadian Sport Tourism Alliance that would develop explicit policies which merge sport and tourism objectives into a coherent approach to the development, sponsorship, hosting and evaluation of sport tourism events.

The second study, *Study of Funding in Support of Ontario's Tourism Festivals and Events* was prepared by Milestone Strategy in January of 2002<sup>21</sup>, as a basis from which to develop a provincial strategy to support festivals and events in Ontario. Some of the study's key findings were:

- Ontario's many and varied festivals and events play an important and critical role in reflecting community culture, history and traditions throughout the province, and thus have tremendous value to those communities that sponsor them, as well as the province overall;
- Beyond these important social and cultural benefits, festivals and events can create significant economic benefits to the province (created by attracting tourists who otherwise would likely not visit Ontario) can be quite significant. They also play an important role in stimulating local economic development in many of Ontario's smaller communities;
- Despite these benefits, many festivals and events suffer uncertain and precarious funding from one year to the next.
- The available evidence shows that Quebec benefits from federal government support of festivals and events to a far greater extent than in Ontario and other provinces; and,
- Ontario does not have a coordinated strategy for Ontario's festivals and events, and historically has not viewed festivals and events as a strong component of the tourism sector, although this attitude is changing as evidenced by subsequent studies, including the subject Competitiveness report.

The most recent study, *A Provincial Policy for the Attraction and Hosting of Major Sport Events*, completed in May of 2003 by KPMG in partnership with Lynn Morrow Consulting and the GEM Group,<sup>22</sup> focused on implementing a provincial policy for the attraction and hosting of major sporting events in Ontario. The study recommended that the Province establish a private non-profit entity to administer its major sport attraction policy with a working capital fund of approximately \$30 million. The study also provides a suggested operational framework for the management of this entity.

Since 2003, three provincial programs have been established to support the festival and event sector.

### 5.3 Strategies and Policies Pertaining to Festivals and Events

There are a number of cities and regions within Ontario that are either actively involved in supporting both major event attraction and hosting initiatives, or have an interest in developing this area. With respect to sport hosting opportunities, active Ontario members of the Canadian Sport Tourism Alliance include: Brantford, Brockville, Burlington, County of Lennox and Addington, Deep River,

Guelph, Greater Sudbury, Hamilton, Huntsville, Kitchener, Kingston, London, Mississauga, North Bay, Orillia, Oshawa, Ottawa, Pembroke, Peterborough, Port Hope, Sarnia-Lambton, St. Catharines, Sault Ste. Marie, Timmins, Thunder Bay, Toronto, Township of Lake of Bays, Wasaga Beach, Waterloo, Welland, Windsor and York Region.

Various cities and regions within Ontario are all trying to address the need for a strategic approach and establishing formal policies around bidding guidelines in their efforts to attract events, as exemplified by the following initiatives:

### **City of Toronto**

The *Five Year Tourism Action Plan for the City of Toronto* (2003) identified the need for the City to take a leadership role in attracting and developing international and national events for Toronto. In order to pursue “mega events”, the City of Toronto Tourism Division established *Toronto International* in 2003 to identify opportunities and create alliances with bid proponents to host international and national sports, cultural, social and other events of significance to enhance Toronto’s profile, stimulate the tourism sector and generate legacies for the community.

The *Toronto International* model was adopted from comparative models in the following cities and countries: Chicago, Cleveland, Edmonton, Halifax, Hamilton, Indianapolis, Melbourne, Montreal, Perth, Denmark and Ireland. However, unlike many of these organizations, which tend to focus exclusively on sports events, Toronto International includes cultural, social and other events of significance.<sup>23</sup>

The objectives of *Toronto International* were to<sup>24</sup>:

- Seek opportunities for the City of Toronto and proponents to bid to host global-scale, sporting, cultural, social or other events of significance;
- Establish an Advisory Board with responsibility for strategic direction;
- Develop legacy programs and facilities;
- Research and analyze event hosting opportunities;
- Liaise with host organizations, federations and key stakeholders;
- Develop and maintain relationships with various levels of government;
- Assist bid proponents in the development of bid documentation and presentations; and
- Work with the City’s Event Support Team to execute major events.

Through its Economic Competitiveness Advisory Committee, the City of Toronto released its *Prosperity Agenda* in January 2008.

As part of the development of a City of Toronto *Prosperity Agenda* and an associated program review, a special major International Event Department housed in the Economic Development, Culture and Tourism Division has assumed the roles and responsibilities of Toronto International.

The Prosperity Agenda references major international events within the context of internationalizations, productivity and growth, place marketing, tourism, infrastructure and citizenship development objectives. In particular:

- Major international event policy and plans should be focused on local-global internationalization [Pillar 3] and productivity and growth improvement [Pillar 2] as a priority, with one of the outcomes being “unique and new attractions, including major international events” that strengthen “the city’s tourism infrastructure.” (Page 26).

- City-led policy development and planning implementation actions for major international events (Page 26), and support for developing partner-led local-global major international event project networking that raises “international profile and engagement” (Page 27) are major priority action items.
- The City should proceed by: “developing a “Major International Event Hosting Policy and Event Attraction/Acquisition Strategy that builds an appropriate mixture of international sporting, cultural, business and societal events that will focus attention on Toronto and its key economic sectors; accelerate development of physical infrastructure; and better connect Toronto to the global citizenry.” (Page 26 and page 39)

More specifically, the Prosperity Agenda detailed that following action items pertaining to its event related objectives:<sup>25</sup>

**Action #7:**

*Develop a Major International Event Hosting Policy and Event Attraction Acquisition Strategy that builds an appropriate mixture of international sporting, cultural, business and societal events that will focus attention on Toronto and its key economic sectors; accelerate development of physical infrastructure and better connect Toronto to the global citizenry.*

**Discussion:**

*Develop a long-term strategy, including sustainable financial model, to host major international events, including an acquisition strategy, funding/investment mechanisms, governance and community engagement. This strategy should also support foreign direction investment (FDI) attraction, export development, tourism, cultural exchanges, creativity and innovation, and knowledge and skills development.*

*Events in the following categories will be pursued and explicitly designed to engage youth and newcomers:*

- *Economic clusters – engage private sector to develop and support events that focus on existing and emerging sectors (e.g., Design Awards, Culinary Showcase, Innovation Fairs, New Media gatherings, Green Roofs Conference)*
- *Cultural events – major cultural festivals and events tied to specific years*
- *Cultural diversity – focus on linkages with source countries of strategic importance and with local population representation*
- *Sports – developmental sports and recreation events that work up the value chain to IOC (International Olympic Committee) and other sport-sanctioned bodies*
- *Urban development – events built around the objective of creating significant new infrastructure legacy for Toronto and region*
- *Civil society – events built on Canada’s humanitarian legacy*
- *Order of government – economic summits, etc. that focus attention on Toronto and its role in the global, national and provincial marketplace.*

**Action #8:**

*Strengthen the City’s tourism infrastructure. Develop policies, including sustainable financial models to ensure that unique and new attractions, including major international events and local events, are being developed/taking place in Toronto at all times.*

**Discussion:**

*Enhance current visitor marketing efforts by Tourism Toronto by building a strategic multi-year events program, integrated scheduling, joint marketing campaigns, costing strategies, sponsorship and information sharing, placing Toronto on centre stage as a must-see destination in target markets.*

*Include new tourism product development, as well as renewal and reinvestment in existing urban cultural and tourism attractions that support Toronto's unique identity (e.g., green tourism – bike trails, edu-tourism, e.g., Conferences/thought leaders; cultural-tourism and arts events).*

*Develop a growth strategy for recurring annual festivals and events. Identify and nurture existing recurring festivals and events that have potential to generate international profile and motivate travel to Toronto. Assess gaps/opportunities for new strategic event development.*

Through its Major Events Project, the City of Toronto has over the last 18 months:

- Reviewed best practices in event strategies and policies throughout the world;
- Examined how to develop and make operational a definition for what constitutes a “major international event” for the City of Toronto policy purposes;
- Developed a strategic approach that will allow Toronto to identify event opportunities commiserate with Toronto being Ontario's Global Capital City, while differentiating Toronto's offering from other cities;
- Undertook a detailed analysis of major international events in 4 major cities;
- Established a model to measure “event value”;
- Examined the challenges stemming from municipal investment in tourism and in particular events, including funding and co-ordination between government levels; and
- Identified other benefits for municipal investment in events, including media value, volunteer commitment, the building of infrastructure, regional development.

Through these efforts, Economic Development, Culture and Tourism staff has drafted a City of Toronto *Major International Event Policy*, which outlines a shared federal/provincial and municipal approach to the development and funding of an Events Strategy, based on the action items noted above. Plans call for the City of Toronto *Major International Event Policy* to be presented to City Council in October 2008.

### **City of Ottawa**

Guided by its mission statement to “provide leadership in the development and delivery of programs and initiatives that enhance Ottawa's business climate and further economic growth, jobs and prosperity in Ottawa”, the City of Ottawa's Economic Development Division is actively involved in supporting both major event attraction and hosting initiatives. Since 2003, the Economic Development Division has provided over \$600,000 in grant funding to major events such as the 2003 Juno's, 2004 Grey Cup, 2006 Ontario Summer Games and 2007 FIFA U20 World Cup Canada.

However, similar to the City of Toronto, there has been no formal policy or guidelines in place to assist Ottawa in the decision-making process in terms of what programs/initiatives to support, nor have there been any performance measurements in place to measure the return on investment for the Division and Ottawa. As such, the City of Ottawa issued a Request for Proposal<sup>26</sup> to select the most qualified proponent to develop a Major Event Funding Guidelines, based on the following study objectives:

- To provide the City of Ottawa with a planned and coordinated approach as well as rationale for decision making on opportunities to support major event bid development;
- To ensure that a fair, open, efficient, effective, equitable, and timely process is in place for evaluating requests made to the City of Ottawa for major event bidding and hosting support; and,
- To provide an economic impact analysis that will measure the impact of the program or event on the local economy.

## City of Hamilton

Hamilton City Council made the strategic decision to establish a not-for-profit corporation to provide tourism and convention services for the City in partnership with the local industry. As a result, *Tourism Hamilton* is a destination management organization which is governed by a 15-member board of directors, dedicated to significantly increasing new and return tourist visitation to Hamilton. In the past five years, the City of Hamilton has won bids, and successfully hosted the World Cycling Championships in 2003, the Canadian Open in 2003 and 2006, and the Briars in 2007. Tourism Hamilton has identified the following regional and provincial event partnership opportunities as strategic opportunities:

**2015 Pan-Am Games:** Positioning the event as a “Greater Golden Horseshoe” opportunity is a positive step to raise the potential for municipalities to work together and take a strategic approach to infrastructure development.

**Partnering on Strategic Bids:** Bidding on national and international opportunities, including both sporting events and large conventions to raise the tourism profile of the community and the province.

## Northern Ontario

The Federal Economic Development Northern Ontario Region (FedNor) is a federal regional development organization in Ontario, which is committed to supporting and enhancing the tourism industry through infrastructure development, marketing and promotions, product development, training and education. Since 2000, FedNor has invested over \$3.7 Million in not-for-profit organizations/municipalities in support of a variety of sports tourism projects ranging from Youth Internships to infrastructure development. Together with other government and community partners, there has been a total investment of \$21 Million in various sport tourism projects. In order to be more strategic in its contributions to sports tourism, FedNor issued a Request for Proposal in August 2008 to:

- Assist in developing a better understanding of the sports tourism industry;
- Provide direction of whether pursuing sporting events is an opportunity for Northern Ontario; and,
- Provide recommendations on how to enhance the capacity of proponents to host sports tourism events.

## Ministry of Health Promotion – International Amateur Sport Hosting Policy

From a provincial perspective, the Ministry of Health Promotion has developed the *International Amateur Sport Hosting Policy* to provide a clear framework for determining the province's involvement in the hosting (or staging) of major sport events in Ontario. To be eligible for support, an event must meet the following conditions<sup>27</sup>:

- The sport event has been sanctioned by an international sport federation that is recognized by the International Olympic Committee, or an International Games Federation (e.g., Commonwealth Games Federation, Pan American Sport Association, World University Games, Special Olympic International), and is awarded through a formal bidding process by the international sport federation or international games federation;



- The hosting organization is committed to provision of ongoing community and provincial level sport, recreation and health promotion benefits, and there are budget provisions incorporated in the event budget to this effect (8% is the suggested benchmark);
- The sport event occurs no more frequently than annually, lasts less than one month and has been held on no more than three consecutive occasions in the same community;
- Involves transfer of temporary intellectual property rights between the long-term owner of property and the organization that will be holding the event; and,
- Is an event that is open to the public to attend as spectators.

The Government of Ontario recognizes that international competitive processes can take place up to seven years before the event is actually held, and therefore considers requests for pre-commitment to hosting support ahead of the award of an event. This consideration is conditional on:

- An organization winning the right to hold an event;
- The Government of Ontario receiving formal notice of intent to bid at least eighteen months ahead of the proposed bid deadline;
- Evidence of ongoing community support and endorsement, and financial support by the involved municipality/ies; and
- Evidence that the event will:
  - Meet the Government of Ontario's sport, recreation and health promotion objectives.
  - Be financially viable.
  - Be overseen and run by a viable organization.
  - Be well planned.
  - Maximize utilization of existing sport and urban infrastructure and tourism accommodation.
  - Provide community and provincial level benefits.
  - Be consistent with community land use and other development plans.
- Conclusion of appropriate agreements with the Province, generally before bids are formally lodged.

Generally, due diligence for an international amateur sport event involves the development of a business plan that covers the case for the event, identifies risks and risk mitigation measures, including:

- Organizational status, capability and future capacity;
- Economic impact assessment done with Ministry approved methodology;
- Community and municipal support, including identification of social impacts, plans and mitigation measures;
- A linkage to any local tourism plans, such as a Municipal Tourism Plan, and information on tourism accommodation capacity;
- Previous sport event hosting experience;
- Marketing planning, including international marketing plan and any sponsorship agreements;
- Communications planning and broadcast agreements, including plans for media centre;
- An independently verified budget that covers operating and capital budgets, cash flow, revenues and associated sources and costs, and surpluses;
- Sport facility and accommodation planning;
- Transportation and security planning;
- Sport and recreation development legacy planning;
- Protocol and ceremonial planning, including accreditation of Government officials; and,
- Environmental planning, dealing with environmental impacts, plans and mitigation measures.

Furthermore, according to the Ministry of Health Promotion website, consideration of requests for financial endorsement and support towards hosting of an event will be contingent upon:

- The overall availability of provincial funds and the requirements of provincial approval processes; and,

- The value of benefits such as: projected provincial tax revenues generated by out-of-province tourists attending the sport event, the impact on provincial revenues in general, the sport, recreation, health promotion, tourism and economic development value to the Province, and other related benefits.

In 2008, funding commitments in support of amateur sport totaled \$23.7 Million.<sup>28</sup> This includes the \$593,500 hosting grant for The Town of Collingwood and surrounding communities to host the *2008 Ontario Winter Games* from March 6-9, 2008. More than 3,000 athletes, coaches and officials are estimated to have participated in the Games, supported by more than 800 volunteers.

The Ministry of Health Promotion was established in June 2005 to improve and deliver programs that contribute to healthy living and wellness in this province. Funding is provided through the Ontario Games Program in partnership with the Sport Alliance of Ontario.

#### **5.4 Ontario's Funding for Festivals and Events**

While the province has demonstrated a commitment to the sector, there is a need to improve overall policy alignment which incorporates tourism objectives. Key provincial funding vehicles for Ontario's festivals and events sector are summarized as follows.

##### **Celebrate Ontario**

The *Celebrate Ontario* initiative was launched through the Ministry of Tourism's Investment and Development Office (IDO) in December 2006 to boost tourism in the province by helping festivals and events across Ontario to enhance their products with new experiences, and eventually attract greater audiences. In 2007, the Celebrate Ontario initiative provided more than \$4 Million in funding to 57 festivals and events. In December 2007, the government announced that it would increase funding for the Celebrate Ontario 2008 initiative to \$10 Million, expanding it to include new festivals and events for the purpose of attracting new tourists.<sup>29</sup>

The 2008 initiative was offered under two levels of funding — smaller, emerging tourism events were eligible for up to \$100,000 in funding and larger, signature events were eligible for up to \$400,000. Up to 85% of the funding was earmarked for enhancements, and 15% for the promotion of those new features. The maximum amount of funding assistance was lowered to allow more organizers of Ontario festivals and events to enhance their products with new experiences that will attract residents and visitors to communities across Ontario.

##### **Ontario Cultural Attractions Fund (OCAF)**

The *Ontario Cultural Attractions Fund* was established in 1999 through the Ministry of Culture as a \$20 Million initiative to "assist Ontario's cultural and heritage organizations in capitalizing on the potential of exciting and innovative exhibitions and events."<sup>30</sup> OCAF is open to large and small not-for-profit cultural and heritage organizations in all parts of Ontario to help to increase and diversify their earned revenue sources by attracting tourists and other visitors to new attractions and special events. The fund is geared towards new events providing up-front working capital in the form of partially-repayable loans.

During the 2005-2006 fiscal year, OCAF supported 22 projects, with total funding commitments of \$1.8 Million, for a total of 201 funded projects and \$25.3 Million in funding allocated between 1999 and 2006. OCAF was originally expected to last from five to seven years, but it was extended to 10 years through client repayments, investment returns and low administrative costs.

### **Ontario Tourism Event Marketing Partnership Program (TEMPP)**

Through the Ontario Tourism Marketing partnership Corporation (Ministry of Tourism), support is given to festivals and events throughout the province that fulfill certain criteria. For instance, funding is provided for Ontario-based, public tourism events that are new, existing and target new or existing markets and use new advertising media. Furthermore, the festival or event must meet Ontario Tourism's definition:

- Must take place in the Province of Ontario;
- Must be of considerable interest to a large number of tourists; and
- Must be open to the public without pre-registration or membership in a club or group.
- Ineligible activities include: charitable fund raising events, meetings, conferences, conventions, investitures, VIP visits, award ceremonies, seminars, clinics and workshops.

Priority is provided through TEMPP for events and festivals that:

- Have significant public/private sector participation;
- Can attract increased visitation from new markets;
- Can extend length of stay and spending in the community by visitors;
- Are packaged with other tourism industry operators in the community;
- Can generate positive media exposure;
- Support Ontario Tourism's Marketing Plan;
- Have local municipal support (letter of support must be provided);
- Occur in the shoulder and off-peak tourist seasons; and
- Include marketing initiatives which target markets beyond 100km of the event location.

TEMPP funding is limited to a maximum of \$200,000.

### **Ontario Trillium Foundation (OTF)**

The Ontario Trillium Foundation (OTF) is one of the leading grant-making organizations in Canada. It is an agency of the Ministry of Culture and has a volunteer Board of Directors. OTF distributes funding to charities and not-for-profits through two granting programs: Community and Province-Wide. Within those programs, funding is allocated in four sectors: Arts and Culture, Environment, Sports and Recreation, and Human and Social Services.

Through the *Province-Wide Program*, the OTF provides grants of up to \$1.25 Million over a period of five years. This can include up to \$250,000 per year for five years, for operating and project expenses, and up to \$150,000 over one or more years, for capital initiatives, such as building renovations and/or equipment purchases. The decision to fund all or part of a request depends on how well an application fits with OTF's granting priorities and the overall demand and granting budget in the Province-Wide Program.<sup>31</sup>

The provincial government's 2008 spring budget boosted OTF's annual funding to \$110 Million from \$105 Million, which will be further increased to \$120 Million by 2009-2010.<sup>32</sup> From April 1, 2007 to March 31, 2008, the Ontario Trillium Foundation granted \$22.2 Million to the Arts and Culture sector; \$12.4 Million to the Environment sector; \$43.6 Million to the Human and Social Services sector; and \$22.2 Million to the Sports and Recreation sector.<sup>33</sup>

OTF Province-Wide grants that have supported festivals and events include:

- Alpine Ontario c/o Freestyle Skiing Ontario – \$192,500 over three years to develop Ski Cross, the newest Olympic sport. Programs for coaching, officials and ski-course design will be offered and technical and safety standards developed for youth high-performance and university-race events.

- The Walrus Foundation – \$105,700 over three years to enhance operational capacity and organize more forums and education events. These will be used to encourage the public to debate on cultural, environmental, ecological and social issues in Ontario communities.
- Ontario Council of Folk Festivals – \$150,000 over three years to enhance capacity and improve services, expand youth programs and reach more culturally diverse groups. An economic-impact study and marketing plan will be completed to advance not-for-profit folk festivals in Ontario.
- Visual Arts Ontario – \$150,000 over two years to conduct an organizational review, develop a strategic plan, and organize community consultations and arts events. Relationships and networks will be formed to help artists better integrate into urban and rural Ontario.

### **Ontario Arts Council**

The Ontario Arts Council (OAC) has been Ontario's primary funding body for professional arts activity since 1963.

OAC offers three types of grants:

- Project Grants – one-time grants for specific projects or individual artists.
- Operating Grants – cover operating expenses of established arts organizations that meet the assessment criteria for on-going support.
- Programming Grants – do not cover core or operating expenses for arts organizations, but support activity that occurs every year.

In 2007-2008, OAC funded 1,300 individual artists and 874 organizations for a total of \$40 million. These grants were of benefit to artists and arts organizations in 252 communities across Ontario.<sup>34</sup> As of April 2008, 35 grants were awarded to literary festivals and organizations throughout Ontario, including \$32,000 for the Ottawa International Writers Festival and \$67,000 for the International Readings at Harbourfront in Toronto, for a grand total of \$529,900.

### **5.5 Summary**

Bidding and hosting of sporting events in Ontario is largely done on an event by event basis. Cultural festivals and events tend to be driven by the host organizations and venues which then rely on a variety of funding programs to attract, develop and support these types of events. Large-scale international conventions are targeted by the DMO and venues, with funding support provided through destination marketing fees.

## 6.0 STRENGTHS AND AREAS FOR IMPROVEMENT OF ONTARIO'S FESTIVALS & EVENTS

### 6.1 Introduction

Ontario has much to offer in terms of attracting, developing and supporting major sporting, cultural and business events. This section identifies the Province's strengths and areas for improvement.

### 6.2 Sporting Events

Based on a review of previous studies<sup>35</sup> undertaken by the Ontario Ministry of Tourism, together with interviews with representatives of the Cities of Toronto, Hamilton and Ottawa, the following have been identified in terms of Ontario's capacity to attract and host major sport events:

#### Strengths

- World-class facilities to host events (e.g., Air Canada Centre, Hershey Centre, Copp's Coliseum, Corel Centre, Skydome, BMO Field).
- Natural resources/product strengths (e.g., Great Lakes, championship golf courses, outdoor winter product in Northern Ontario, numerous rivers and lakes, trail systems, etc.).
- Multi-modal transportation infrastructure within and between major urban centres.
- Three communities with over 10,000 available hotel rooms (Downtown Toronto, Ottawa, and Niagara Falls).
- Two communities with 5,000 to 10,000 available hotel rooms (Toronto Airport, Downtown Ottawa).
- Twelve communities or regions with 1,500 to 5,000 available hotel rooms (Thunder Bay, Hamilton, Windsor, Mississauga/Oakville/Burlington, Brampton, Richmond Hill/Markham, Kingston, Kanata, Don Valley/Scarborough/North York, London, Kitchener Waterloo/Cambridge/Guelph, Sault Ste Marie)
- Access to university and college sport facilities and dormitory capacity.
- Access to major markets (i.e., population concentrations in Southern Ontario and border states).
- Good community support through national sport governing bodies.
- Good volunteer base, with capacity to offer a broad range of languages.
- Access to corporate sponsorship support and national media.
- Experience in running national and regional single and multi-sport events.
- Interest amongst many Ontario municipalities in attracting sport tourism (a number of municipalities and destination marketing organizations are members of the Canadian Tourism Sport Alliance).
- Building on past experiences/lessons learned in preparing bids which have been unsuccessful.
- Experience in cross-regional collaboration in preparing mega sporting event bids (exemplified by recent Pan Am Games bid involving 12 Ontario municipalities).

#### Areas for Improvement

- Better co-ordination and clear strategy amongst the three levels of government as to which bids to attract and support.
- Strategic decision making across the province in terms of which bids to support.
- Coordinated decision making in host communities and organizations on which bids to go after particularly as there are high costs associated with hosting and bidding.
- Need for a one-stop provincial mechanism to co-ordinate bids with other levels of government.
- Need for consistent evaluation tools and methodology to assess bid opportunities and post-event results.

### 6.3 Cultural Festivals & Events

Based on a review of previous studies<sup>36</sup> undertaken by the Ontario Ministry of Tourism, together with interviews with Festivals Ontario, the Ministry of Culture and Ontario Cultural Attractions Fund, the following have been identified in terms of Ontario's capacity to attract and host major cultural events:

### **Strengths**

- Larger cultural festivals and events tend to be located in urban areas, which have the necessary infrastructure requirements.
- Most festivals focus on culture, entertainment, heritage and history – all of which are very popular.
- Ontario's festivals and events play a critical role in reflecting community culture, history and traditions, providing civic pride and value to those communities that host them as well as to the overall province.
- New festivals have been developed based on emerging trends – arts, culinary, music, film, ethnicity, literary, gardening, etc.
- A number of locally based festival and event networks have been established throughout Ontario to share resources, plan, market and co-ordinate events at the community level (i.e., Ottawa Festivals Network, Festivals & Events Niagara, SSM Festivals and Events Network).
- Tourists attending festivals tend to stay longer, spend more, and make more use of tourism facilities than many other types of visitors. Most events tend to be annual re-occurring events of two to three days in duration, with a number of events 10+ days.
- Ontario already has a few signature festivals, which could be classified as major annual international festivals, which draw tourist demand from outside Ontario.

### **Areas for Improvement**

- More festivals need to find ways to promote themselves as an international tourism product;
- Need for more blockbuster events that draw tourists from out-of-province. These types of events are usually driven by a champion at one of Ontario's cultural venues. However, due to cost implications and the level of risk involved, few venues host major cultural events.
- Need for comprehensive tourism festival and event policy across government.
- Need for government funding programs with multi-year funding.
- Funding tends to be distributed over a large number of events with varying size and tourism significance.
- Need for a Major Events Strategy to promote excellence and to encourage the development of events with a real tourism growth potential for communities and regional economies.
- Need for long-term or strategic planning by individual festivals. Most festivals and events are operated by not-for-profit organizations, heavily reliant on government grants. Operators are focused on short-term annual funding issues, rather than long term strategic plans.
- Allocation of funds to tourism marketing is often a lower priority. The Ontario Cultural Attractions Fund addresses the need for attracting tourists and other visitors to an event; however event organizers do not tend to have the necessary marketing expertise to attract tourists.
- Very few opportunities for certification or professional development in the sector. Today, Festivals and Events Ontario is forging alliances with colleges and universities offering event management and tourism courses to address this need and is affiliated with International Festivals and Fairs, which offers training for a Certified Festivals and Event Executive designation.
- Need to re-invest in festivals and events in order to keep the product "fresh".
- Events are faced with challenges related to the regulatory environment (security, safety, liquor licensing) that place increasing pressure on resources.
- Need for consistent evaluation tools and methodology and support funding to track attendance and economic impacts of a festival or event.

## **6.4 Business Events**

Based on a review of previous studies<sup>37</sup> undertaken by the Ontario Ministry of Tourism, together with interviews with Tourism Toronto, and MaRS, the following have been identified in terms of Ontario's capacity to attract and host major business events:

### **Strengths**

- Toronto, Niagara Falls and Ottawa/Gatineau are the only Ontario destinations capable of handling large business events in excess of 10,000 delegates and offer convention<sup>38</sup> and trade show facilities which compete with U.S. and international destinations.
- Toronto, Niagara Falls and Ottawa/Gatineau are well positioned to attract major business events from the perspective of air lift, hotel inventory, quality of venue and service and tourist appeal.
- DMO's in each of the major centres have M&C Sales and Marketing teams and access to funding through destination marketing fees in order to support marketing of attract large scale business events to their respective communities.
- Ontario has strength in its ethnic diversity and key economic clusters, including Film, Medical Research, Biotech, Aerospace, InfoTech and Financial Services, among others, which could be targeted for major business events and internationally recognized events.

### **Areas for Improvement**

- Ontario faces several challenges in terms of hosting major business/convention events including: border crossing issues such as customs, duties, passport requirements; exchange rate; venue/convention centre costs; and, cost of transportation to Ontario.
- There is a need for a strategic framework, which places priorities on the types of business events, which Ontario should target, supported by a Major Event Attraction Policy.

## **7.0 DEVELOPING A 15-YEAR CALENDAR OF EVENTS**

### **7.1 Introduction**

This Study called for the development of a 15-year calendar of upcoming events in the three major event sub-categories: sporting events; cultural events; and, business events

Due to the regularly scheduled nature of sporting events, a 15-year calendar of upcoming events has been developed. However, due to the non-recurring nature of cultural exhibitions that are available for bidding and hosting, combined with the fact that iconic festivals tend to be specific to a destination, creating a long-term calendar was not feasible. Similarly, the highly competitive nature of large-scale business events such as association-based conventions prevents long-term information from being made available to the public.

### **7.2 Sporting Events**

The majority of large national and international sporting events are scheduled on either an annual, biannual or quadrennial basis. For example, the calendar representation of international and national sporting events that were available for bidding and that took place in 2007 and 2008 was developed as well as a database containing a 15-year calendar of sporting events that were and are still available for host bidding. According to this calendar, there are 982 available events to be bid on from 2009 to 2021.

The primary source for the 15-year calendar of sporting events are events sanctioned by the international governing bodies of major sport organizations. Other sources included the *Sports Alliance of Ontario*, *Sport Canada's Hosting Program*, *Ontario's International Amateur Sport Hosting Policy* and the *Canadian Sport Tourism Alliance* (CSTA) event database. The CSTA event database

contains event profiles for approximately 200 sporting events and where they have been held. The database is updated on an annual basis and is only available to members of the CSTA.

A review of major events held in Ontario in 2007 was used to provide an indication of seasonality for bidding on future major international sporting events. Table 7-1 summarizes the seasonality of the 94 major sporting events that were held internationally in 2007.

<b>Season</b>	<b># of Events</b>	<b>%</b>
Peak (Jun, Jul, Aug)	39	42%
Shoulder (Apr, May, Sep, Oct)	20	21%
Off (Jan, Feb, Mar, Nov, Dec)	35	37%
<b>Total</b>	<b>94</b>	<b>100%</b>

*Source: PKF Consulting*

Of the 94 sporting events held internationally in 2007, 42% were held during the peak season, 37% in the off season and the remaining 21% during the shoulder seasons.

### 7.3 Cultural Festivals and Events

Given the unique nature of cultural events, it is very difficult to take a cookie cutter approach to sourcing them. Typically, cultural events grow out of the mandate of a facility or a discipline. In most cases, disciplines have associations, and persons representing the facility or discipline attend association conferences and trade fairs. It is at these conferences and trade fairs where people of similar disciplines interact and organically develop potential new cultural events, discover what is being tried elsewhere, and identify which travelling exhibitions/events may be available for hosting. Beyond that, it is up to stakeholders to decide if the event would draw mass appeal and be viable.

In identifying existing cultural events within Ontario, and the seasonality of these events, a one-year calendar of recurring cultural events that have taken place or will be taking place in Ontario in 2008 was developed. The majority of these cultural events would not be considered major international events, drawing tourists from outside the province, rather they tend to be regional/community festivals and events (i.e., attract a minimum of 10,000 visitors). A total of 101 recurring events were captured from the following sources: stakeholder interviews; Festivals & Events in Ontario April 2008 – March 2009 Event Guide; and, funding recipients from the Ontario Cultural Attractions fund and Celebrate Ontario.

Table 7-2 shows the distribution of the 101 recurring cultural events in Ontario in 2008 by season.

<b>Season</b>	<b># of Events</b>	<b>%</b>
Peak (Jun, Jul, Aug)	53	52%
Shoulder (Apr, May, Sep, Oct)	33	33%



Off (Jan, Feb, Mar, Nov, Dec)	15	15%
<b>Total</b>	<b>101</b>	<b>100%</b>

Source: PKF Consulting

Of the 101 cultural events that have been hosted or are expected in Ontario in 2008, 52% occur during the peak season, 33% in the shoulder season and the remaining 15% during the off season.

#### 7.4 Business Events

Sourcing large business events is primarily done by meeting planners via sales and marketing efforts of the jurisdiction's Destination Marketing Organization (DMO). Large business events are typically booked 7 to 15 years in advance. One resource available to DMOs is the *Meeting Information Network* (MINT) database, maintained by the Destination Marketing Association International (DMAI). The database tracks the history of major business events, including host venues and event size. The database is only available to DMOs that are members of the DMAI.

A list of 28 business meetings of over 10,000 delegates that have been hosted within Canada since 1995 was developed. Due to the limited number of large business events held in Ontario, the scope was broadened to include Canada-wide events. It was inferred that if a group considered Canada as a host destination, they would consider hosting an event within Ontario.

Of the 28 large business events held in Canada since 1995, 57% were held during the peak season, 32% in the shoulder season and the remaining 11% during the off season.

Season	# of Events	%
Peak (Jun, Jul, Aug)	16	57%
Shoulder (Apr, May, Sep, Oct)	9	32%
Off (Jan, Feb, Mar, Nov, Dec)	3	11%
<b>Total</b>	<b>28</b>	<b>100%</b>

Source: PKF Consulting

#### 7.5 Conclusion

The majority of all sporting, cultural and business events in Ontario have been held within the peak season months of June, July and August, followed by the shoulder season for cultural and business events and the off-season for sporting events. This knowledge will be useful for future strategic planning around bidding on and hosting major international events.

Due to the regularly scheduled nature of sporting events, a 15-year calendar of upcoming events was developed based on information from international governing bodies of major sport organizations.

Cultural events that are available through an international bidding process tend to be non-recurring, while other major cultural events are specific to a destination. New cultural events tend to be created organically, or travelling exhibitions/events available for hosting are identified by host venues in conjunction with representatives of specific artistic or cultural disciplines. In contrast, business events are sourced by the sales and marketing efforts of a DMO. The competitive nature of large-scale business events prevents public access to long-term information about upcoming events. Hence, the development of a long-term calendar was not feasible for the cultural and business event sectors.



## 8.0 BEST PRACTICES IN OTHER JURISDICTIONS

### 8.1 Introduction

As background input for the development of a strategic framework for Ontario's festivals and events sector, PKF identified and assessed the strategic practices employed in other jurisdictions. Research has been completed on the following eight international and five Canadian jurisdictions:

- Scotland
- Ireland
- North East England
- Northwest England
- UK Sport
- Australia – Western Australia and Victoria
- New Zealand
- Finland
- Québec
- Nova Scotia
- Newfoundland and Labrador
- British Columbia
- Edmonton

The process behind developing a strategic framework for major events has been presented for each jurisdiction, together with case studies on successful events, and relevant information with respect to:

- Programs, Policies & Practices to Support the Strategy
- Role of Cultural Institutions to Support the Strategy, Promote Civic Pride and Attract Visitors
- Programs & Practices to Target Off-Season and Shoulder Season Events
- Lessons Learned for Commemorative Event Celebrations
- Regional and City-Driven Approaches to Festivals & Events
- Economic Development & Socio-Cultural Impacts of Festivals & Events
- Management, Sustainability & Funding Models
- Performance Measurements used to Determine Short and Long-Term Impacts of Festivals & Events

The full analysis of these practices has been included as an Appendix to this document (see Appendix E).

### 8.2 Summary of Major Event Strategic Practices by Jurisdiction

The combination of jurisdictions analyzed for this report provide a variety of best practices in the realm of strategy development, attraction and hosting of major international events. It should be noted, however, that as separate entities, no single jurisdiction provides all the necessary information for developing Ontario's strategic framework. The following highlights of the specific ways in which each jurisdiction has benefited or learned lessons from their experience.

#### Scotland

- Developed a strategic vision and mission statement around attracting major events – which has provided a means for measuring accomplishments in the major event industry.
- Created public-private partnerships for attracting and bidding on events in order to ensure that all stakeholders can see the wider picture when bidding on major international events – so that everyone understands the scope and benefits of the whole process.

- Developed an arms length organization (EventScotland) to implement the Major Events Strategy, including compiling a portfolio of events (13 years), and identifying appropriate leadership.
- Created an inventory of existing infrastructure for hosting world-class events, prior to bidding, and determining gaps in infrastructure that will reduce effects of seasonality.
- Developed strategies to attract events that are aligned with existing tourism-related strategies.
- Improved methods for appraising event proposals (i.e., costs and benefits should be shared across a variety of public sector entities) to track success or failure of others who have bid on events.
- Developed two strategies for event bidding: an International Programme to bring mega-events to the major cities of Edinburgh and Glasgow and attract people and media from outside the destination, and a Regional Programme to develop domestic tourism and develop unique cultural and sporting events in areas outside major cities.
- Maintained control over the bidding process to ensure that the events chosen will bring the best impacts for the entire country.

### **Ireland**

- Invested \$250 million in the arts and culture sector and creative industries, and ensuring that all cultural institutions are included in the planning/budgeting process for the future.
- Developed distinctive events based upon existing assets, such as Dublin International Art 2010, and thereby demonstrating the economic importance of festivals for increasing tourism.
- Viewed festivals as successful tourist attractions help to make them more worthy of state support and corporate sponsorship (i.e., committed stakeholders).
- Proactively pursued public/private partnerships.
- Saw cultural tourism separately from sport tourism – the International Sports Tourism Initiative was developed long before the Festival & Events Initiative.
- Government investment in tourism development for “Gateway” cities was considered a regional benefit, since the Gateway cities drive regional economies.
- Developing a specific fund for creating a small number (2-3) of major annual events that are expected to showcase national culture, music and literature – and attract a significant number of international visitors.
- Facilitated relationships between the Arts Council of Ireland, state tourism agencies and the national media – which have helped tourist demand to grow exponentially for festivals, and thereby increased festivals’ revenue flow and economic viability.
- In the case of Wexford and Galway, increased states support and corporate sponsorship which help make festivals economically viable.

### **North East England**

- Developed an e-business platform to build regional awareness of major festivals & events.
- Demonstrated collaboration, including information-sharing and strategic planning in coordinating bidding.
- Initiated a performance review of the Festivals & Events Strategy and event management team.
- Recognized that one strategy cannot put all types of events on the same playing field.
- Understood that putting an arts & culture organization in charge of bidding on major events, meant sporting events were almost completely forgotten.
- Recognized that most major event bodies are focused on sport first and foremost, as opposed to culture.
- Understood that cultural event planning tends to occur more at the city and venue level and this can drive regional development.
- Recognized the need to develop specific economic and/or social thresholds to identify “fewer, bigger, better” events of international caliber, whether they be existing events, or events that could be attracted to the jurisdiction.
- Recognized the value of home-grown events with historic significance, and developing these into major international events (i.e., the Great North Run).

### **Northwest England**

- Issued a study on benefits of the 2002 Commonwealth Games in Manchester to provide a source of lessons learned for the entire region of NW England.
- Developed cultural festivals around major sporting events – recognizing that a major event cannot and should not be planned in isolation. In the case of the Commonwealth Games, hosted smaller cultural events to celebrate the larger events improved the Games’ legacy and created more overnight stays.
- Encouraged volunteerism with incentives – leading to employment or otherwise.
- Created a Regional Major Events Steering Group to implement the Major Events Strategy (instead of a dedicated body). The Steering Group includes individuals who are still active in other facets of the public and private sectors in Northwest England.

### **Western Australia**

- Developed its major events strategy based on its natural strengths (i.e., bio-diversity and eco-systems) that set it apart from other jurisdictions.
- Invited residents to discuss and debate the type of tourism industry they want up to 2020 – thereby extending the social benefits of event tourism.

- Recognized that investment in major cities can create benefits for the wider region – i.e., various segments of WA Government invested in infrastructure and other resources within the City of Perth for the Perth International Arts Festival, in order to ensure that the benefits of the festival would extend beyond the City.

### **Victoria**

- Established the Victorian Major Events Company (VMEC) – a not-for-profit, government funded agency – to attract tourism to Victoria and raise the international profile of the city of Melbourne having recognized that major events were the State’s competitive advantage.
- Created a Major Events Cabinet Committee (MEEC) made up of various public and private representatives to determine which events would receive funding based on research.
- Facilitated a partnership between the City of Melbourne and State of Victoria to develop a world class events calendar. The calendar is based on a diverse and flexible approach, which attracts a range of events that bring a variety of benefits to the State.
- Developed a three phased Major Event Management Cycle in Victoria: Pre-event Assessment, Funding Management, and Post-Event Assessment.
- Created a major events “cap” to fund existing events and secure new events, such as the 2005 Australian Formula 1 Grand Prix and recommending a new model to gage the economic, environmental and social benefits of major events.

### **New Zealand**

- Provided support for events that are held off-shore that can produce the same high level of benefits as those held within the country – demonstrating value of partnerships.
- Created a new agency within the Ministry of Tourism – New Zealand Major Events – to administer a Major Events Development Fund and develop a National Events Strategy. The agency provides secretariat support to the Inter Agency Events Group, a group of 10 representatives from 10 National Ministries, who make the final decisions on which events receive funding on an annual basis.
- Combined resources with major event agencies in other countries to identify mutually beneficial events.
- Formed synergies with business agencies and organizations, in order to create and share a calendar of events, and leverage business opportunities.
- Monitored event infrastructure by creating a database of relevant events infrastructure, and providing support when needed to build capability.
- Facilitated the development of separate Regional Event Strategies to identify key events of national significance with the potential of becoming iconic events.

### **Finland**

- Put one ministry in charge of allocating funds for major events.

- Developed a committee to collect data and determine what should be included in a Major Events Strategy prior to its creation.
- Made detailed preparations during the planning phase of the application process for each bid.
- Prioritized sporting events as the country is already renowned for sporting events.
- Used lessons learned at the municipal level, i.e., developing a dedicated event office that would liaise between investors in the events (i.e., government) and private sector event organizers.
- Used their own strengths in sustainable development to make the 2005 World Athletics Championships in Helsinki the first eco-efficient major event.

### **Quebec**

- Established the Festivals et Événements Québec (FEQ), a non-profit organization with 190 members representing fairs, festivals and events and developed a partnership with the Société des Attractions Touristiques du Québec (SATQ). This resulted in a coordinated approach to the development of festivals and events in Quebec.
- The Société de Evénements Majeurs Internationaux du Québec has a three-year \$30 Million fund, which was established in 2000 to assist organizations in presenting annual events of international significance.
- Developed REMI, an association of 20 of Québec's largest events that acts as an advocacy group for major cultural, sporting and recreational events. REMI developed criteria for events: i.e., they must have an audience of which 15% were tourists, a budget of at least \$1 Million over the last two years.
- The Fêtes du Québec Maritime illustrates how a number of small-scale activities, even though they may have a unifying concept, are unable to play a significant role in attracting tourists.
- Major festivals and events held in Quebec benefit from significant levels of federal funding, largely through the Economic Development Agency of Canada for Quebec Regions.

### **Nova Scotia**

- Combined municipal and provincial forces (Sport Nova Scotia and the Halifax Regional Municipality) to apply for federal support for the bid on the 2014 Commonwealth Games recognizing that they would have an important impact on Nova Scotia as well as on sport infrastructure and athletic development in Atlantic Canada.
- Formed the Nova Scotia Festivals and Events Council to represent and provide leadership for the sector across the province.
- Aligned Nova Scotia's tourism product strengths with its Event Strategy to include Music and Gaelic Festivals, and Sporting Events.

### **Newfoundland & Labrador**

- The Cabot 500 commemorative event resulted in an additional 69,000 persons visiting the province in 1997, a 22% increase over 1996, and an incremental contribution of \$37 Million to the economy – after a provincial investment of \$10 to \$15 Million to launch the event.
- According to the Province, results of the Special Celebration Strategy provided the platform for a more focused marketing strategy, which in turn increased:
  - Product awareness and identification;
  - Business travel stemming from strong economic growth, the celebration events and the opening of the St. John's Convention Centre;
  - Media coverage of the Province;
  - New and enhanced infrastructure including: expanded ferry capacity on the Gulf crossing; construction of the Trans Labrador Highway; and, aggressive promotion of the province as a cruiseship destination.
  - Initiatives aimed at enhancing overall service delivery to tourists, including: continued enhancements in service quality; and, an increase in the variety of available tourism experiences.
- The Special Celebrations were a means of leveraging additional funding from the federal government through existing federal-provincial agreements. These agreements had been in place since the 1970s, but became extremely important during the downturn of the fishery industry in the 1990s. Special events were utilized as a strategy to leverage more from these agreements for marketing and product development purposes.
- The gains in tourism volumes and expenditures also invigorated the industry resulting in additional investments in transportation, accommodation, heritage and recreation facility infrastructure.<sup>39</sup> The record growth trend held for four years after 1997, with non-resident visits and expenditures increasing by 12% in 1999 and 22% in 2000.
- Research indicated that the Multi-Year Major Events Strategy would have benefited from more pre-committed, sustained funding to allow for pre-planning and sufficient marketing lead time. This was especially crucial as there was a minimum of three years lead time required for impact: subsequent anniversaries did not have the broad appeal and weight/lure of Cabot 500; difficulty reconciling/aligning event objectives with core tourism marketing objectives; long-term visitation targets were not realized. The impact of Cabot 500 on brand integration was too late, pointing to a need to integrate the special event brand with the provincial brand.

### **British Columbia**

- A partnership with the Ministry of Sport, Tourism and the Arts, and 2010 Legacies Now are committed to building BC's reputation as a premier sport event destination and to maximizing sport hosting opportunities leading up to, and beyond the 2010 Winter Games. The partnership has identified the growth potential of integrating the sport and tourism industries in the province through a number of the following sport tourism initiatives; and
- The Hosting BC Grant Program is part of the efforts of the 2010 Legacies Now that aims to maximize the number of events prior to and post 2010, as well as to build on the province's reputation as a premier sport event hosting destination. During the past three years, the program has granted \$2.2 Million dollars in 34 communities to host 162 events in communities throughout BC.



## Edmonton

- Edmonton Events International and the Edmonton Arts Council are the primary agencies, which attract and support sport tourism and festivals within the City.
- Edmonton Events International (EEI) is a three-tier structure administered by Edmonton Tourism, in concert with the following organizations: City of Edmonton, Northlands, University of Alberta, Edmonton Sport Council, Edmonton Arts Council, West Edmonton Mall, Aquila Productions, Association of Edmonton Convention Hotels, Edmonton Oilers Hockey Club, Edmonton Eskimo Football Club and Edmonton Chamber of Commerce.
- The City attracts a strong portfolio of sports events throughout the year, with EEI providing the following services to organizations: preparation of bid packages; site inspections; accommodation/venue coordination; and, marketing and promotion of the event.
- As part of the Cultural Plan for the City of Edmonton, it was recommended that: grant support for established arts and festival organizations be increased to support Edmonton's 30 major festivals which support the marketing of Edmonton as Canada's Festival City; and, a biennial arts festival with Edmonton as the "Capital City Stage" be created.

## Key Best Practices and Lessons Learned

Throughout our best practice research, several common themes have emerged with regards to the strategic practices employed in various national and international jurisdictions. Although the structures and resources surrounding these practices may differ, certain key lessons have been identified for consideration in the development of a potential Ontario strategic framework for major festivals and events.

## Management & Sustainability

### Developing a Strong Organizational Structure to Attract, Support and Develop Major Events

The evaluation of comparative jurisdictions shows a range of organizational structures to support the attraction of major events. Overall, the most effective model is to create a dedicated, arms-length organization to develop and support major events with a separate Board or Committee to determine which major events would receive funding. It is also evident that a range of skills is required to make appropriate funding decisions for different types of events. Out of those jurisdictions that have not created a separate event office, most have created a steering committee with representatives from a variety of backgrounds to complement the event bids.

### Developing a Sustainable Event Profile & Event Calendar

In all jurisdictions reviewed, the most common practice is for the associated event or tourism agency to find and attract events for the coming calendar year, under a dedicated annual budget. Thus, most major event organizations have an event profile that the jurisdiction is known. Each year they fill an event calendar or portfolio, based on available funding. In many cases, when a government changes, budgets changes as well. As a result, strategies need to be adaptable if a jurisdiction is going to gain sustainable positioning as a major event hosting destination. The organization may have long-term goals for future calendar years, such as making a bid for a world-class event that will take place in 2014, but the budget will be allocated on a year-on-year basis in coordination with the planning of this event.

Our research shows that successful event tourism destinations have clearly articulated and coordinated event profiles linked to partnerships with relevant industry organizations (i.e., sport, cultural or business). In some cases the event organization hosts a program for bidding on major sport and/or business events, and a separate program for developing cultural festivals/events. Other

jurisdictions have programs that distinguish between attracting city-based, international caliber events and events aimed at enhancing regional festivals and/or supporting sport events. A successful event profile includes a diversity of events that will not carry the same recurring events every year, but maintains a balance of recurring and non-recurring events from different sectors.

Some jurisdictions have found it worthwhile to secure some significant 'quick wins,' and ensure wherever possible that events can be spread throughout the year. Where appropriate, opportunities for bundling smaller events under an umbrella (based on theme, geographic or time) provide mega-events with opportunities to make a greater impact due to economies of scale and collective promotions.

The most relevant jurisdiction for setting up an event calendar is Victoria. Its approach is flexible and adaptable, and does not require attracting a specific number of events. Within this approach, event selection depends on whether resources and venues are available.

### **Importance of Due Diligence**

In all cases where the jurisdiction has made the decision to develop a strategic framework around major festivals and events, they have invested heavily into research and analysis for a period ranging between 12-18 months. This has led to recognition of best practices in organizational models, for instance the phased management cycle employed by the *Victorian Major Events Company*.

### **Performance Measurement and Coordinated Bidding = Risk Mitigation**

Those jurisdictions that have developed a strong model for measuring the future performance of a major international event, and using this model to assess funding allocation, have managed to prolong the legacy of an event and mitigate risks (i.e., decreased ROI on capital investment or complete loss of the bid). One of the best examples of this was the bid for the *2002 Commonwealth Games* in Manchester, which was considered to be an opportunity for developing effective partnerships between various levels of government and the private sector. This model was incorporated into a long-term, strategic urban regeneration framework.

### **Environmental Sustainability**

Event tourism must be included in an overall economic development strategy for a jurisdiction. Major events must be recognized as legitimate tourism revenue generators, if they are going to become sustainable. Finland's *ECOMass Programme* ensured that the *2005 World Championships* would become an eco-efficient mass event as it was based on the recognition that this mega event could easily place a heavy burden on local communities and the environment. The national and municipal governments, event organizers and University of Helsinki faculty worked together to develop sustainable patterns of consumption and service provision. This collaboration also demonstrated that an environmental program can be incorporated into the hosting of a major international sporting event.

### **Identifying Strategic Priorities & Ensuring the Legacy for Major Events**

#### **Creating a List of Priorities for Selecting Major Festivals & Events**

There is a need to develop criteria and specific guidelines for funding of events that are in place prior to selection. For example, the goal of Scotland's international program is to meet an event profile criteria by choosing events that: generate substantial economic benefits to Scotland through increased visitation (tourists/spectators/participants); Highlight Scotland as an events and tourism destination through high-profile, international television/media coverage; and, Enhance Scotland's opportunities to host further major events.

### **Event Sectors Dominate Major Event Strategies**

Prior to creating a strategy for major events, most jurisdictions prioritize the types of events they want to host. This may be done by event significance or event sector. Event strategies tend to be built on a jurisdiction's existing strengths. For instance, jurisdictions that have identified cultural tourism as a priority have focused on attracting and supporting cultural events. In some cases the major event strategy suggests developing a broad portfolio of events, including arts, culture and business, but identifies that sporting events will be a major economic focus. For instance, Scotland's Major Events Strategy focuses on attracting both sporting and cultural events, but recognizes that the priority is to secure a few key mega events over a 10-year period.

Throughout the comparative research, it is evident that the national or state/provincial government has recognized the importance of its major urban centres in creating opportunities for international exposure, which flow through to the rest of the region/state. Separate regional strategies tend to focus on increasing domestic tourism, by supporting events that take place outside the major urban centres.

### **Quality vs. Quantity – Emphasizing Diversity over Event-Driven Strategies**

In some cases, where a government has determined that attracting major events is a significant way to increase the destination's global tourism profile, an event-driven approach has been employed. This approach tends to focus on selecting events that require a large capital injection on a short-term basis (i.e., providing assistance for a host community to bid on the *Olympic Games*). The problem with this approach is that if the bid fails, there is no reward. Consequently, successful approaches tend to involve a longer-term approach based on creating a diversified portfolio of events that make use of available tourism product (i.e., infrastructure, resources, activity base).

### **Hosting Major Sporting Events Should Not Be Planned In Isolation**

Major sporting events are often part of a rotation and there are few that come to define a destination. However, they may be potential catalysts for change in global perceptions of a place, as well as instigators of local pride impetus for the future. Those jurisdictions that have hosted major events, such as the *2002 Commonwealth Games* in Manchester, have learned that hosting smaller cultural events to celebrate the larger event, improves the legacy impact and generates increased tourism.

### **Creating an Inventory of Event Infrastructure**

It is important to create an inventory of infrastructure that will be used to accommodate major events that are chosen for the event calendar. This helps a major event agency or selection board to determine which events are appropriate for a jurisdiction.

### **Setting up Policies for International Event Bidding**

The international events industry is increasingly competitive and bidders are very sophisticated. As costs for bidding and developing events increases, there is an ever-growing need to obtain high quality information about available events and the nature of global competitors.

There are many reasons for a location to develop strategies for hosting mega events like the Olympic Games, one of which is that this type of image-building event can help to put the destination on the "tourist's mental map."<sup>40</sup> Events also make a destination seem warm and friendly – and manifest heritage, cultural or environmental themes for residents and tourists. Also, bidding for mobile sporting events is a good way for generating positive economic impacts at a destination.

The best practice research indicates that a winning bid strategy should include: accountability, political support, relationship marketing, capacity to organize the event, adequate infrastructure, a relatively skilled bid team, effective communication and exposure strategies, and sufficient existing facilities. Effective personal lobbying is also considered key to winning an event bid.

Other best practices include:

- Setting up an events diary
- Improving partnerships in the area of sports;
- Developing coordinated investment in infrastructure for sports events;
- More strategic involvement of public sector bodies with event organizers; and,
- Building a reputation for the region by supporting selected home-grown events.

Not only the event organization, but also all stakeholders in a given jurisdiction need to see the wider picture when bidding for major international events in order to ensure a successful bid.

### **Developing Partnerships and Funding Policies to Support Major Events**

#### **Private-Public Partnerships Secure Major International Events & Enhance Tourist Demand**

Major sporting events like the EURO are often run by associations for the sport itself with the backing of the private sector, but require marketing assistance. Other mega-events like the *Soccer World Cup* are largely publicly funded due to substantial capital costs. Yet, these have the potential to generate considerable economic and social benefits for the destination only with additional private sector funds. Many jurisdictions have opted to develop a dedicated events body to increase knowledge sharing and coordination with regards to event bidding processes. This includes securing funding and sponsorship from private sector entities such as the *Rexall Edmonton Indy* event or Edmonton's *Labatt Blues Festival*.

In the realm of culture, relationships with art agencies, tourism agencies and media have boosted home-grown festivals such as the *Wexford Opera* in Ireland, to the status of an international event. In many cases, public-private sponsorship leads to exponential growth in tourism demand, which in turn increases the festival's revenue flow and economic viability. In the *Wexford* case particularly, sponsorship was particularly important because local audiences could not have sustained the content or the high prices that the festival required in order to become an opera festival of international standing.

#### **Prioritizing Funding Policies**

Best practices show a distinct difference between funding for sport, culture and business events. In Ireland, a specific fund has been dedicated to encourage the development of a small number of major annual events focusing on new events that drive international visitors and revenue near supporting infrastructure. Furthermore, the most successful event organizations create a tiered-funding model based on financing and operating requirements.

A good example is Scotland's model for funding international vs. regional events. Its *International Events Programme* was developed to support and attract events that will generate significant international media coverage and/or create significant economic impact for Scotland. Through this program, EventScotland works with new or existing events by providing financial assistance on a short-term basis and through partnerships with local and/or national government agencies in tourism, sport, culture and economic development works to secure additional funding.

### **Commemorative Events**

#### **Commemorative Events Require Long-Term Planning & Substantial Budgets**

Through the best practice analysis, the most predominant lesson learned regarding the hosting commemorative events is that planning needs to begin well in advance of the event itself. If the event is going to draw international tourists, it needs to be marketed at a global level, whether by establishing a dedicated website or through other distribution methods. Consequently, budgets for commemorative events need to be large enough to sustain marketing, capital and operational costs as well as post-event impact assessments. This would help to sustain the legacy of events for a destination.

MTOUR needs to consider these practices in order to ensure that Ontario can effectively compete on a world-class stage to host international events.

## 9.0 TOWARDS A STRATEGIC FRAMEWORK FOR A MAJOR EVENTS TOURISM STRATEGY

### 9.1 Introduction

The *Ontario Major Festivals and Events Attraction Research Study* is intended to provide the Ontario Government with clear recommendations in developing a potential strategic framework to target major international and national festivals and events with the greatest economic potential and raise the profile of Ontario.

The *Study* reviews the literature and analyzes the lessons learned of leading jurisdictions with respect to attracting, bidding on and hosting major international events.

The *Study* also provides an overview of Ontario's current festival and event industry and identifies high potential opportunities to grow Ontario's domestic and international major event potential based on Ontario's current strengths and assets.

This combined research forms the recommended foundation for a proposed Ontario strategic framework to target major festivals and events with the greatest economic potential to increase the tourism competitiveness of Ontario, and provides suggested implementation considerations.

### 9.2 Best Practices – Major International Festivals and Events Strategy Development

As identified in the literature review and analysis of leading jurisdictions (in Section 8.0 and Appendix E), successful jurisdictions undertook a strategic approach to targeting major festivals and events based on a common set of key activities:

#### Priority-Setting – Targeting Types of Events

Based on literary sources and best practice research, the most common ways of defining major events are by sector, size/significance and frequency. For example:

Northwest England identified the need to develop a major events strategy in order to generate economic growth in the region. Under this strategy, major events are considered by the expected volume of future tourism that they can generate.

National tourism organizations in Australia differentiate various types of events by their subject matter, including: cultural events, sporting events and business events (MC&IT). Western Australia currently focuses on cultural events. For example, the region has its own resident symphony orchestra, ballet and opera company, several unique theatre companies, a state art gallery, Institute of Contemporary Art, and is home to the famous *Perth International Arts Festival*. Previously, Western Australia was only investing in major sporting events.

In Finland, major event bodies' focus on sporting events as the country is renowned for its sporting events.

Destinations, such as Vancouver/Whistler and London, England (which have been selected to host upcoming Olympics) are maximizing this opportunity by focusing on sport as a sector. Both jurisdictions are targeting conferences pertaining to physical education and sport, training camps, and pre-Olympic events in the years leading up to the Games. They are also targeting sporting competitions which make use of the legacy facilities purposely built for the Games.

## **Building on a Jurisdiction's Natural Strengths And Assets**

As identified in the best practice research, most successful event strategies were developed by building on a jurisdiction's strengths and natural assets (regardless of whether the strategy is focused on event significance, size or sector). Strengths may include, but are not necessarily limited to: cultural attractions, availability of infrastructure, unique bio-diversity and eco-systems, local heritage, current business climate/opportunities and innovations in industry. For example:

Finland has been a leader in demonstrating effective management of environmental efforts and sustainable development techniques since 1987. It developed the ECOMass Programme to ensure that the 2005 World Championships would become an eco-efficient mass event.

In Scotland, Homecoming Scotland 2009 was established to celebrate the 250th anniversary of Robert Burns' birth, as well as Scotland's contributions to the world: golf, whisky, great minds and innovations, culture, and heritage.

Nova Scotia's strengths in music and Gaelic heritage are featured in such events as the Gathering of the Clans, the East Coast Music Awards, and Celtic Colours International Festival, Drum.

## **Linking to Overall Tourism Priorities**

Most best practice jurisdictions linked their major events strategies to their overall tourism priorities, and have established criteria to provide the framework for assessing event opportunities, including their potential impacts and legacies.

Common criteria include measurements of: social impacts (civic pride, community development); economic impacts (GDP, jobs, taxes); tourism impacts (increased tourism volume and value); development impacts (construction costs, increased property values); and media profile (increased international destination profile). For example:

Northwest England identified two key measurable beneficial characteristics of major events: economic benefits and media benefits. Social and commercial impacts are seen as important, but not precisely measurable. The economic benefits of a major event were seen as being measurable through the incremental value added to the economy - in this case, by whether an event has maximized the number of visitors from outside the Northwest region. In terms of media benefits, it was determined that the value of short term publicity for major events could be estimated by the promotion expenditure and cost of advertising saved, and in the long term, publicity could lead to an enhanced image of the destination and increased visitation in the long term - measurable by the expected volume of future tourism.

In Scotland, before events are even considered, event organizers are asked to consider the following questions, with respect to the event: Will this event bring a significant number of spectators/participants to Scotland? Will this event provide significant international media coverage of Scotland? Will this event provide an economic return on investment through additional visitor spending? Will this event leave a sustainable legacy for Scotland?

## **Prioritizing Government Supports/Resources**

This approach focuses government resources on targeting priority types of events identified by the jurisdiction.

Best practice research in key comparable jurisdictions to Ontario (with respect to size, urban/rural mix and political structure) indicate that leading jurisdictions target major events separately from smaller, regional and/or local events. In some leading jurisdictions, a separate longer-term strategy was also developed to support emerging major events with high potential to become major events. For example:

Scotland created an International Events Programme to attract people and media from outside Scotland, and a Regional Events Programme to attract primarily Scottish audiences.

In Ireland, the government identified that tourism investment should be targeted on: tourism infrastructure; major new events and other innovative products that attract additional visitors. A specific fund has been dedicated to encouraging development of a small number of major annual events focusing on new events that drive international visitors and revenue near supporting infrastructure.

New Zealand created a National Events Strategy, through the development of separate regional event strategies, while identifying key events of national significance with the potential of becoming New Zealand's iconic events.

Northwest England uses a three-tiered approach to targetting events:

*Global Giants* – existing events that act as “flagships”;

*Organic Excellence* – events that can grow into world-class events to reflect the region's character; and

*Attack Zone* – existing world-class events with a proven record in delivering specific economic targets or high profile value through the international bidding process.

### **Identifying a Long-Term Approach to Supporting Festivals And Events**

The literature suggests that a long-term approach to supporting major festivals and events is important. This approach should be based on the creation of a diversified portfolio of events that make use of available tourism product (i.e., infrastructure, resources, activity base, and maintains a balance of recurring and non-recurring events from different sectors). For example:

North East England saw opportunities to further increase the tourism economic impacts of festivals and events to the region by building a strategy to "increase the number, quality, profile and legacy of festivals and events." Since the motivation for festivals and events differ, their impacts (both social and economic) are unique. The first challenge was to determine which activities within each event or festival required extra time and resources. The central goal of the strategy was to provide an action plan to identify how to focus on the right event for the right venue, with investments based on quality, added value, and value for money. Furthermore, the strategy had to be connected to other long-term regional goals, with a clearly defined relationship to tourism, image, business, and education.

### **Developing a Strong Evaluation and Funding Delivery Structure with Clear Roles**

Best practice trends show the importance of establishing an organizational framework with specific roles and responsibilities and a sustainable funding delivery mechanism to attract and support major festivals and events. For example:

In Ireland, a specific fund was established to create two to three new major annual events to showcase Ireland's culture, music and literature, with the goal of attracting international visitors.

In Victoria, Australia, a Major Events Cabinet Committee was created with private and public sector representation to determine which events will receive funding based on research-based criteria.

In North East England, Sport England, Arts Council England – North East, Culture North East and members of the private sector partnered to create its Festivals and Events Strategy which highlights: the role that festivals and events play within the key economic and social agendas; future development requirements; and strategic relationships with regional and sub-regional economic program activity;



In Northwest England, a Regional Major Events Steering Group, comprised of representatives of the public and private sectors, was established to implement the Major Events Strategy (rather than a dedicated event body).

A dedicated event office in Finland liaises between investors of events (i.e., the government) and private sector event organizers.

The Société de Événements Majeurs Internationaux du Québec established a three-year \$30 Million fund in 2000, to assist organizations in hosting annual events of international significance.

Alberta's Edmonton Events International (with representatives from the municipality, sport and arts councils, attractions, public facility venues, and private sector businesses) and the Edmonton Arts Council are the primary agencies that seek to attract and support sport tourism and festivals within the city.

In New Zealand, the National Events Strategy recommended the attraction of specific conferences aimed at supporting key industries. However, it recognized that securing these types of events does not fall within the Events Strategy and it should remain the mandate of Conventions and Incentives New Zealand.

### **9.3 Current Situational Analysis of Ontario's Major Festivals and Events Sector**

Overall, Ontario appears to be well suited for major event and festival tourism given its strong product offering and assets:

Provincial Commitment to Festivals and Events Sector - Through various funding programs including: Celebrate Ontario; the Ontario Cultural Attractions Fund; Tourism Event Marketing Partnership Program; Ontario Trillium Foundation and Ontario Games Program, Ontario has demonstrated a commitment to the festivals and events sector.

Existing Successful Events - Some festivals and events supported through provincial funding have done very well. For example: TIFF and Caribana generate significant international media exposure, while LuminaTO and Ottawa's Winterlude are gaining a provincial and national reputation. These events have increased the tourism profile of the host destination. Many small and medium-sized festivals, which tend to attract local and regional domestic visitors, have also been effective in facilitating community cohesion and a sense of civic pride.

Size of Festivals and Events Sector in Ontario – During a typical year, an estimated 5.1 million overnight tourists in Ontario attend festivals and sporting events, of which about 1.3 million (25%) are inbound visitors, bringing between \$100 and \$400 million in new money into the province.

Building on the results from Section 6.0, we have identified a preliminary list of some assets that are unique to Ontario for which Ontario could build upon for a potential event strategy (Figure 9-1).

<b>Figure 9-1</b>		
<b>SOME OF ONTARIO'S UNIQUE OPPORTUNITIES FOR HOSTING</b>		
<b>ONTARIO'S ASSETS</b>	<b>POTENTIAL OPPORTUNITIES</b>	<b>RANKING AND RATIONALE</b>
<p><b>Infrastructure to support mega and major events including sport facilities</b></p>	<ul style="list-style-type: none"> <li>▪ Ontario has a number of world-class facilities to host events, natural resource/product strengths in Ontario (i.e., Great Lakes, multi-modal transportation infrastructure between major cities, major hotel room blocks in excess of 1,500 rooms in 17 communities).</li> <li>▪ Concentration of urban centres in Golden Horseshoe, including availability of large workforce and volunteer base to host and operate mega and national sporting events.</li> <li>▪ Ability to attract mega and major sport events that require a variety of venues and accommodation infrastructure in close proximity. This maximizes venue efficiency while decreasing the requirements for new built infrastructure (i.e., Pan Am Games, Olympics, etc.).</li> </ul>	<p><b>High</b></p> <ul style="list-style-type: none"> <li>▪ Research shows that mega events are supported by host communities, in large part because of their role as a catalyst for urban renewal and international media exposure.</li> <li>▪ Major events can optimize the use of existing venues (built and natural), or those venues currently deemed “likely developments”.</li> <li>▪ Ontario has had success in hosting recurring national events, such as the Roger’s Cup, Canadian Open, Bell Capital Cup, FIFA U21 World Cup and Toronto Grand Prix, but to date has been unsuccessful in bidding on mega sporting events.</li> </ul> <p><u>Considerations;</u></p> <ul style="list-style-type: none"> <li>▪ There is a need for better coordination and a strategy for bidding on events.</li> <li>▪ Mega sporting events require significant capital investments in new infrastructure (legacy) projects.</li> </ul>

<b>Figure 9-1</b>		
<b>SOME OF ONTARIO'S UNIQUE OPPORTUNITIES FOR HOSTING</b>		
<b>ONTARIO'S ASSETS</b>	<b>POTENTIAL OPPORTUNITIES</b>	<b>RANKING AND RATIONALE</b>
<p><b>Culture and the Arts</b></p>	<ul style="list-style-type: none"> <li>▪ Performing arts performances and venues - Build on Toronto's success in the Toronto International Film Festival and the availability of large-scale public assembly facilities and performing arts venues in the province. Source out potential North American festival and event operator companies to sell the GTA and Ontario as a new destination for performance-based events. As an example, Tourism Toronto has recently confirmed its first Toronto International Band and Orchestra Festival in the GTA for May 2010.</li> <li>▪ Ontario's growing "showcase" experiences - Foster the development of Ontario's strengths in wine &amp; culinary, fashion &amp; design, architecture, agriculture, arts, culture and literature, etc. through events.</li> <li>▪ Ethnic Diversity - Attract events based on the interests and talents of Ontario's varied ethnic communities (i.e., Bollywood Awards, Caribana, MuslimFest, Salsa Festival, etc.); Build events around existing and growing domestic markets - i.e., French-speaking communities in Eastern Ontario (i.e., Games of La Francophonie), and Aboriginal culture in Northern Ontario (Little Native Hockey League Tournament).</li> <li>▪ Ontario's major urban centres – events could be built upon the unique attributes of Ontario's primary cities (e.g., Ottawa is Canada's capital, Toronto is Canada's largest city - known for its diversity and multiculturalism).</li> </ul>	<p><b>High</b></p> <ul style="list-style-type: none"> <li>▪ Ontario already has shown success in hosting signature events located in urban areas with the necessary infrastructure. New festivals focusing on product strengths (entertainment, history) and emerging trends (culinary, film), and celebrating Ontario's ethnic diversity can be created.</li> <li>▪ Based on Foreign Policy magazine's Global Cities Index, Toronto ranks as the world's fourth best city to experience culture (behind London, Paris and New York).</li> <li>▪ Ontario has had success in several cultural celebrations including LuminaTO, Pride Toronto, Caribana, Chinese Lantern Festival, TIFF, Oktoberfest, etc.</li> <li>▪ Tourists attending cultural festivals tend to stay longer, spend more, and make more use of tourism facilities than many other types of visitors.</li> </ul> <p><u>Considerations:</u></p> <ul style="list-style-type: none"> <li>▪ There is a need for a coherent and coordinated strategy and coordination of funding sources.</li> <li>▪ Ontario has pioneered a measurement methodology to estimate the tourism economic impact of cultural events, thereby demonstrating the economic importance of major cultural events in the province (i.e., Barnes Exhibition at the AGO in 1994, Renoir Exhibition at the National Gallery in Ottawa in 1997).</li> </ul>

Figure 9-1

**SOME OF ONTARIO'S UNIQUE OPPORTUNITIES FOR HOSTING**

ONTARIO'S ASSETS	POTENTIAL OPPORTUNITIES	RANKING AND RATIONALE
<p><b>Key Economic Clusters</b></p>	<ul style="list-style-type: none"> <li>▪ Ontario has three major business centres - Toronto, Niagara Falls and Ottawa/Hull. Each can handle major international events (over 10,000 delegates) and are well positioned to attract major business events.</li> <li>▪ There are also several destination resorts, which offer secure sites to host smaller key conferences.</li> <li>▪ Toronto's profile is cosmopolitan and diverse, and is an accessible destination for large-scale U.S. and international based association business.</li> <li>▪ DMO's are also present in each major urban centre in Ontario to coordinate event bidding and hosting.</li> <li>▪ Ontario currently has four Convention Centres - Toronto, Ottawa (under expansion), London and Hamilton - with a new Centre being developed in Niagara Falls. As well, numerous conference centres, trade and exhibition centres and conference venues are available in casinos.</li> </ul>	<p><b>High</b></p> <ul style="list-style-type: none"> <li>▪ Overnight business convention delegates generate significantly more economic impact than typical overnight visitors. Business convention visitors accounted for 1% of total visits to Ontario in 2004, but generated 5% of the total visitor spending.<sup>41,42</sup> There is huge potential for hosting large-scale meetings and conventions in Ontario.</li> <li>▪ Ontario's strengths include: film, medical research, biotech, aerospace, agriculture, InfoTech and financial services.</li> <li>▪ Ontario successfully hosted the XVI International AIDS Conference in Toronto in August 2006. This event attracted more than 21,000 delegates from 187 countries.</li> </ul> <p><u>Considerations:</u></p> <ul style="list-style-type: none"> <li>▪ Ontario is experiencing world challenges around border crossing and exchange rates and cost of transportation.</li> <li>▪ North American cities continue to expand and upgrade convention facilities, at the same time as other Canadian cities (i.e., Vancouver) making it necessary for Ontario to stay competitive in terms of its infrastructure.</li> <li>▪ Difficult to compete for medical conferences in Ontario because the Canadian Pharma Code is more stringent than in the U.S. The code limits the sponsorship and hospitality opportunities available to pharmaceutical companies, making U.S. venues more attractive for these types of business events.<sup>43</sup></li> </ul>

Figure 9-1

## SOME OF ONTARIO'S UNIQUE OPPORTUNITIES FOR HOSTING

ONTARIO'S ASSETS	POTENTIAL OPPORTUNITIES	RANKING AND RATIONALE
<b>Ontario Offers the Best Farmland in Canada</b>	<ul style="list-style-type: none"> <li>▪ Ontario has over 50% of the farmland for Canada - build on related industry events (i.e., Taste Trail in Prince Edward County, Wine Route in Niagara) and government strategies (i.e., Ontario Farm Fresh, Culinary Tourism in Ontario - Action Plan)</li> </ul>	<p><b>Medium</b></p> <ul style="list-style-type: none"> <li>▪ Culinary tourism is a niche market and is still in development. Currently, it attracts a largely domestic draw. At this time, it does not have high potential for a major international event.</li> </ul>
<b>Universities and Colleges</b>	<ul style="list-style-type: none"> <li>▪ Ontario's 19 public universities and 24 public colleges of applied arts and technology (with over 100 campuses) attract over 300,000 full-time students annually, of which 35,000 are international students). This provides the potential for both student sporting events and academic and business think tanks on various leading-edge research topics.</li> </ul>	<p><b>Medium</b></p> <ul style="list-style-type: none"> <li>▪ Medium potential to build events specifically around Ontario's universities and colleges (however could complement business events or provide potential facilities).</li> </ul>
<b>Natural Product Diversity</b>	<ul style="list-style-type: none"> <li>▪ Showcase the Great Lakes, Canadian Shield, Niagara Escarpment, Niagara Falls, Frontenac Arch Biosphere Reserve, etc., through events that make use of these natural products.</li> </ul>	<p><b>Low to Medium</b></p> <ul style="list-style-type: none"> <li>▪ Low potential to build major events around Ontario's natural product diversity, given the remote location of its natural features. One exception is the Great Lakes and Niagara Region, which offer medium potential, given the uniqueness and location of these locations.</li> </ul>
<b>Key UNESCO World Heritage Sites and Biosphere Reserves</b>	<ul style="list-style-type: none"> <li>▪ Build events around existing UNESCO biosphere reserves (4) and World Heritage Site (i.e., Fort Henry and Fort York - proposed).</li> <li>▪ The Frontenac Arch Biosphere Reserve has a dual UNESCO designation with the Rideau Canada heritage site which could tie in with trails and culinary initiatives.</li> </ul>	<p><b>Low</b></p> <ul style="list-style-type: none"> <li>▪ Low potential to build major events around these features because of the need to protect them.</li> </ul>

## Ontario's Challenges

### Need for a Strategic Approach

Ontario's biggest challenge is to create a strategic approach to target and develop major events that link to overall government tourism objectives. Currently, Ontario has:

A *Sport Hosting Policy* for sporting events, however, it also needs policies that govern the attraction and hosting of cultural and large business events;

Several Ontario regions which are capable of hosting major and mega sporting events compete with one another in bidding on an event. All which tend to require provincial support;

A variety of funding programs fund festivals and events with different priorities related to the types of festivals and events. These programs include: *Celebrate Ontario; the Ontario Cultural Attraction Fund; the Ontario Trillium Foundation; OTMPC's Ontario Tourism Event Marketing Partnership Program; and, the Ontario Arts Council*. As a result, provincial funding supports a broad range of events that do not fit or link into one strategic overall Ontario objective. Focusing government resources would promote excellence and encourage the development of events with a real growth potential for communities and regional economies;

Need for long-term funding (i.e., up to three years) for festivals and events. This would support organizers to plan for long-term growth of events;

A broad range of events including major events such as TIFF and Winterlude and smaller community events such as Port Elgin Pumpkinfest. Each event has its own goals. As a result, events primarily have a local or regional focus, have a largely domestic draw and many occur concurrently; and

A broad range of festivals and events could build better on Ontario's assets/strengths. This could lead to greater economic sustainability and build upon the existing priorities and strengths of Ontario.

### Need for Performance Indicators to Measure the Impacts of Events and Festivals

There is a need for comprehensive and accurate tourism attendance information to measure the volume and value of Ontario's festival and event sector. However, the province has joined with a consortium of provincial and federal partners to generate a set of guidelines for providing consistent and reliable estimates of the tourism economic impact of cultural and sporting events. Because they are expected to have sizeable tourism economic impacts, three events have been identified by the *Ontario Ministry of Tourism* as worthy of study in the first period in the past decade for which research funds are available. Thus, the guidelines are being applied to the 2008 Caribana Festival, Toronto International Film Festival and the Shaw Festival. Preliminary results of these studies and estimates of the tourism economic impact of these events are not yet available.

## **9.4 RECOMMENDATIONS FOR A STRATEGIC FRAMEWORK FOR ONTARIO**

### **Recommendation 1: Strategic Approach to Targeting and Developing Major Events**

It is recommended that the province's **first priority** is to develop a strategic approach to targeting and developing major events that clearly links to Ontario's overall tourism objective of increasing tourism revenue generated.

In developing its strategic approach, it is recommended that Ontario adopt a **two-tier Event Strategy**, with the following goals:

**Major Events Strategy** - Target, bid on and develop major events in Ontario which would:

- Generate substantial economic benefits to Ontario through increased tourist visitation (i.e., tourists, spectators, delegates, participants);
- Highlight Ontario as an events and tourism destination through high-profile, national and international television/media coverage; and,
- Enhance Ontario's opportunities to host further major events.

**Emerging Major Festival and Event Development Strategy** - Develop and nurture a portfolio of events that would:

- Generate economic benefit for specific regions of Ontario;
- Attract visitors to a region from other parts of the province;
- Enhance the profile and appeal of the host region;
- Inspire and involve local communities; and,
- Have potential to become major events.

### **Recommendation 2: Ontario's Priorities – Sport, Culture, and Business Events**

It is recommended that the province's **second priority** is to identify the types of events it wishes to pursue, within its strategic approach to targeting and developing a diversified portfolio of major events.

Based on an assessment of Ontario's current strengths and assets, it is recommended that Ontario focus on the following types of events for a potential major events strategy:

#### **Major sporting events, which are available for hosting/bidding:**

Primarily recurring events that attract national and international tourists, or are the premier sporting event for a particular sport. In some cases, this could include new events manufactured to accommodate growing popularity of a particular sport, which could be nurtured to achieve national or international status. Examples of the different categories of major sporting events that could be targeted include:

- Mega Events - *Olympic Games, Pan Am Games and Commonwealth Games*
- Tour/Calendar Events - *Canadian Professional Golf Tour, Roger's Cup*
- Challenges & Competitions - *Canada's Cup (Yacht Racing Challenge)*
- Special/Manufactured Events - *2007 Inaugural Walter Gretzky Street Hockey Tournament*

#### **Major cultural events with national and international audiences:**

These include international expositions such as world fairs, "blockbuster" events and heritage commemorations. This includes events that have transitioned from local events to ones with inter-provincial and/or international stature. Examples of major cultural event types include:

- Iconic/Hallmark Events - *Toronto International Film Festival*
- Travelling Exhibitions - *Barnes Exhibit, Body Works Exhibition*
- Dedicated Exhibitions - *Venice Biennale International Art Exhibition*
- Commemorative Events – War of 1812 Anniversary celebrations

#### **Major business events:**

These include large-scale association conventions (loosely defined to be those attracting over 10,000 delegates), public issue-oriented international events such as the AIDS conference, high media exposure events, or certain industry based trade shows.

Some key business events should be sought on the basis of international media exposure rather than on the number of tourists or tourism economic impact.

- Association Conferences/Conventions - *American Bar Association Conference*
- Trade Shows - *Globe 2008 (Auto industry trade show), Toronto International Art Fair*
- Government/Political Events - *G8 Summit*
- Public Issue Events - *AIDS Conference*

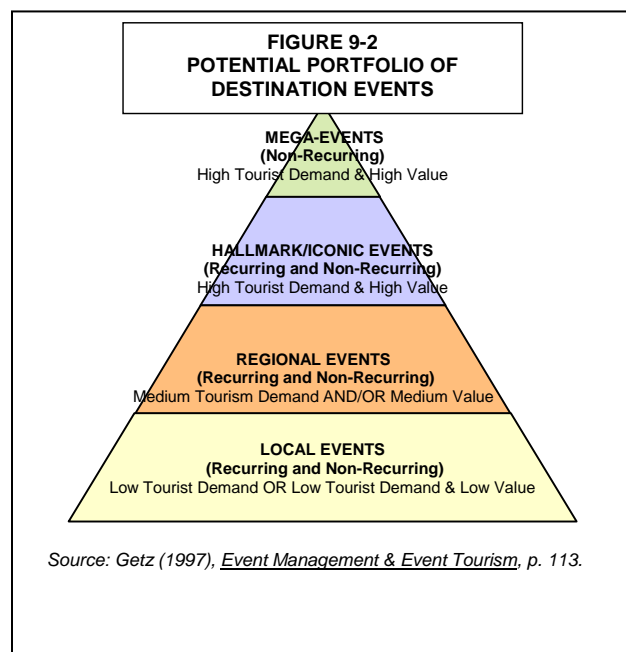
### **Recommendation 3: Ontario's Priorities – Events by Size**

Based on an assessment of Ontario's current strengths and assets, it is recommended that Ontario: Ontario build a diversified portfolio of events, based on size, with the focus on attracting one mega event every 10+ years; Continue to grow and maintain its market share in the province's hallmark events; Growing emerging events (local and regional events) that have the greatest potential to attract out of province visitation to become hallmark events.

Mega events are events of "world importance and profile" yielding *extraordinarily high levels of tourism* and *high visibility* for the host location, but occur once or twice in a lifetime for that destination.

Hallmark or iconic events are major, one time or recurring events of limited duration, developed primarily to enhance the awareness, appeal and profitability of a tourism destination in the short and/or long term. Such successful events rely on uniqueness, status or timely significance to create interest and attract attention.

Regional and local events create *widespread benefits for the greater region or province*, and may include emerging events that have the ability to grow into Hallmark Events, but currently do not tend to attract high levels of tourist demand or generate significant levels of economic returns for a destination.

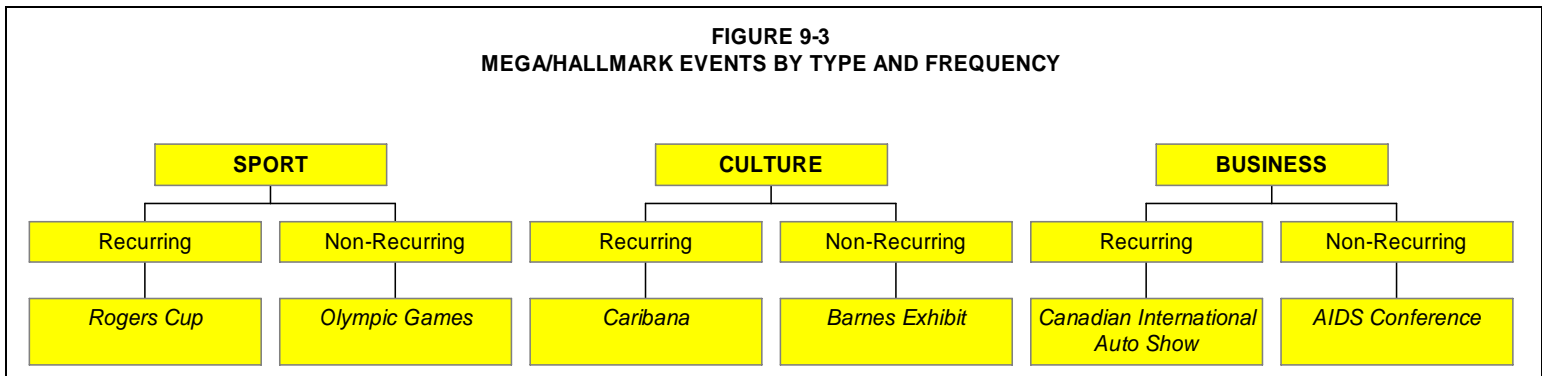


### **Recommendation 4: Ontario's Priorities – Events by Frequency**

Based on an assessment of Ontario's current strengths and assets, it is recommended that Ontario **build a diversified portfolio of events, based on frequency.**



Hallmark events tend to be recurring (annual or periodically held event within the destination), while Mega events are always non-recurring (once in a lifetime events at the destination), within the respective sectors. Figure 9-3 shows examples of recurring and non-recurring major events within each event sector.



### **Recommendation 5: Identify Lenses for Assessing Event Opportunities**

It is recommended that the province identify its priority “lenses” which will establish a framework based on a matrix of qualitative and quantitative criteria for assessing major and emerging event opportunities.

#### **Considerations: Developing an Evaluation Matrix to Rank Event Opportunities**

The size of an event should not be the only defining factor in determining whether or not it aligns with major event tourism priorities. Best practice research stresses that:

- The best method to assess, evaluate and determine which events a government/jurisdiction should support, include an economic, social and environmental appraisal of proposed events. The appraisal would address both supply and demand-side issues related to the event opportunity, in order to determine whether the events fit identified priorities and how much (if any) funding should be provided;
- The organization in charge of funding major events must perform a stringent evaluation of events to assess their success. While criteria is already in place for event qualification in various grant programs throughout Ontario as identified in Section 5.4, including: *Celebrate Ontario*, *Ontario Cultural Attraction Fund*, *TEMPP*, *Ontario Trillium Foundation*, etc., guidelines (currently under development to provide reliable estimates of attendance and tourism economic impact) could provide a consistent methodology for assessing all events; and,
- It is necessary to create a consistent methodology for evaluating the significance of events, including their potential impacts and legacies.

Note: Many of the beneficial characteristics of events are not measurable with any precise metrics, i.e., social impacts (civic pride, community development) and commercial impacts (construction costs, increased property values), etc. Other traceable economic benefits include: investment in physical regeneration projects (i.e., stadiums and galleries), and greater potential for inward investment by improving the image of the region/jurisdiction. Major events are seen as potential catalysts for change in global perception of a place, as well as instigators of local pride.

#### **Lens Recommendations**

In developing a potential matrix of lenses for assessing major event opportunities, it is recommended that the province:

- Together with its regional and municipal stakeholders and other public sector partners who already fund events, work in partnership to build evaluation matrices (i.e., apply a rating to the importance of each of the suggested lenses, develop a list of criteria to measure each of the lenses, index the results) in order to determine which tourism events would be optimal for meeting a variety of interests and needs across Ontario. Ideally, the development of a common approach to event appraisal for the province.
- Develop a methodology to ensure that event appraisals happen in a timely manner that supports decision-making related to event development and execution.
- Consider its priorities as a whole and for individual cities and regions in order to balance these dimensions through the events portfolio and priorities for resource allocations.
- Focus on major events which can optimize the use of existing venues (built and natural), or those venues currently deemed 'likely developments'.

#### Recommended Priority "Lenses for Ontario"

Criteria for determining the benefits of major national and international events for Ontario should be based on a matrix of relevant tourism, social, economic and environmental factors – a triple bottom line, including, but not necessarily limited to the following potential quantitative and qualitative measurements (Figure 9-4).

**Figure 9-4  
POTENTIAL “LENSES” FOR ONTARIO EVENTS**

Lenses		Major Event Strategy	Emerging Major Festival & Event Development Strategy	
1.	<b>Event Profile Lens</b>	<p><i>Event Type</i></p> <ul style="list-style-type: none"> <li>Is it a Mega Event, Hallmark or Iconic Event, Regional, or Community Festival or Event?</li> </ul> <p><i>Event Sector</i></p> <ul style="list-style-type: none"> <li>Which sector does the event represent: Sport, Culture or Business?</li> </ul> <p><i>Duration of the Event</i></p> <ul style="list-style-type: none"> <li>What is the duration of the event – Days, Weeks or Months? Based on Quebec’s RÉMI association, an event must last between 3 to 36 days.</li> </ul> <p><i>Frequency of the Event</i></p> <ul style="list-style-type: none"> <li>Is the event Recurring (Annual or Biannual) or Non-Recurring (i.e., every four years)?</li> </ul> <p><i>Time of Year Held</i></p> <ul style="list-style-type: none"> <li>Does the event take place in the Peak Season, Shoulder Season or Off Season?</li> </ul> <p><i>Media Profile</i></p> <ul style="list-style-type: none"> <li>Will the event attract Local, Regional, Provincial, National, or International coverage, including TV broadcasting, radio and print? As an example, there are a total of 10,000 media representatives scheduled to cover the 2010 Winter Olympics, as compared to a Community Event, which can be expected to attract mainly local media.</li> </ul> <p><i>Hosting Decision</i></p> <ul style="list-style-type: none"> <li>How many years in advance of event is the bid decision made?</li> </ul>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>

**Figure 9-4  
POTENTIAL “LENSES” FOR ONTARIO EVENTS**

Lenses			Major Event Strategy	Emerging Major Festival & Event Development Strategy
2.	<b>Tourism Lens</b>	<p><i>Tourism Volume and Value</i></p> <ul style="list-style-type: none"> <li>▪ How many tourists will be attracted to the event? (Note: To be included in Quebec’s top 20 major events in the RÉMI organization, an event must attract a minimum audience of 25,000 if tickets are required or 200,000 visitors if the site is open).</li> <li>▪ How many peak room nights will be generated by the event?</li> <li>▪ How much will tourists spend in the province?</li> <li>▪ How much of this spending will be incremental – spending in Ontario that will not take place without the specific event?</li> </ul> <p><i>Potential to attract national and international markets</i></p> <ul style="list-style-type: none"> <li>▪ What percentage of the expected event attendance will be from out-of-province? (As an example, membership in Quebec’s RÉMI association requires that the event must attract a minimum of 15% of its attendance from out of province, over the past two years).</li> </ul> <p><i>Product/Experience Fit</i></p> <ul style="list-style-type: none"> <li>▪ Does the event have the capacity to promote Ontario’s natural products/strengths?</li> <li>▪ Does the event promote Ontario’s culture and heritage products and experiences?</li> <li>▪ Does the event tie into Ontario’s economic strategies and/or long term city strategies?</li> <li>▪ Does the event have the capacity to attract creative and qualified talent?</li> </ul>	 ✓      ✓       ✓	 ✓      ✓       ✓

<b>Figure 9-4 POTENTIAL “LENSES” FOR ONTARIO EVENTS</b>			
<b>Lenses</b>		<b>Major Event Strategy</b>	<b>Emerging Major Festival &amp; Event Development Strategy</b>
	<p><i>Regionality</i></p> <ul style="list-style-type: none"> <li>▪ Does the event spread the benefits of tourism across the regions?</li> </ul>	✓	✓
3.	<p><b>Economic Lens</b></p> <p><i>Contribution to GDP over a specific time frame</i> (Note: A Major Events study by Siemens and Roland Berger Strategy Consultants notes that a major event will probably not result in a rise in GDP because there are too many factors that play into the development of national GDP for a major event to make a difference. However, if an event is embedded in a sensible overall strategy, GDP can be expected to rise eventually, and the overall economic situation can be improved, especially if legacy effects are taken into account. <sup>44</sup>)</p> <p><i>Job Creation</i></p> <ul style="list-style-type: none"> <li>▪ How many new FTE or temporary jobs will be generated by the event during the following stages:                             <ul style="list-style-type: none"> <li>▪ Event planning</li> <li>▪ Infrastructure development</li> <li>▪ Hosting of the actual event</li> </ul> </li> </ul> <p><i>Tax Revenues</i></p> <ul style="list-style-type: none"> <li>▪ What will be the expected tax revenues generated to the Federal, Provincial and Municipal governments through:                             <ul style="list-style-type: none"> <li>○ Infrastructure development</li> <li>○ Event operation</li> <li>○ Visitor spending?</li> </ul> </li> </ul>	<p>✓</p> <p>✓</p> <p>✓</p>	



**Figure 9-4  
POTENTIAL “LENSES” FOR ONTARIO EVENTS**

Lenses	Major Event Strategy	Emerging Major Festival & Event Development Strategy
	<p><i>Impact Assessment and Cost-Benefit Evaluation</i></p> <p>The costs associated with hosting a major event can be significant; however, the benefits should outweigh the costs in the long run. Still, best practices indicate that even successful cities and destinations can be left with a deficit in their capital and/or operating budget. While the positive benefits of an event include the long list of tourism, economic, infrastructure, legacy and socio-cultural benefits, negative costs of an event might include:</p> <ul style="list-style-type: none"> <li>▪ Tourists who decide not to visit because of the event;</li> <li>▪ Investments which are not connected to the event, which might be put on hold or withheld all together;</li> <li>▪ A rise in property taxes, due to costs associated with the event;</li> <li>▪ Environmental impacts such as noise pollution, higher emissions due to increased transportation, waste management, etc.;</li> <li>▪ Perceived political or organizational failure due to the loss of a bid, or unsuccessful hosting of an event; and</li> <li>▪ Social costs, such as the displacement of people living on a major event development site, as in the case of the recent Beijing Games.</li> </ul>	✓

<b>Figure 9-4 POTENTIAL “LENSES” FOR ONTARIO EVENTS</b>			
<b>Lenses</b>		<b>Major Event Strategy</b>	<b>Emerging Major Festival &amp; Event Development Strategy</b>
	<p><i>Ability to maximize opportunities leading up to and beyond the event</i></p> <p>Cities hosting Mega Events, such as the Olympics, have found that for several years leading up to the event, they attract many more meetings and conventions that otherwise would not select them. After the event, there is also a tendency to attract increased numbers because of interest in the destination, and the development of event strategies aimed at continued utilization of the new sporting and cultural facilities.</p>	✓	



<b>Figure 9-4 POTENTIAL “LENSES” FOR ONTARIO EVENTS</b>			
<b>Lenses</b>		<b>Major Event Strategy</b>	<b>Emerging Major Festival &amp; Event Development Strategy</b>
<p>4. <b>Infrastructure and Capacity Lens</b></p>	<p><i>Infrastructure and Capacity Requirements</i></p> <ul style="list-style-type: none"> <li>▪ Will the event utilize existing Infrastructure and venues or require new infrastructure and venues? (Note: Most major events require significant infrastructure improvements, which are often higher than originally expected)</li> <li>▪ What are the infrastructure costs?</li> <li>▪ Who will partner in the event infrastructure costs and to what degree – federal, provincial, municipal governments and private sector?</li> <li>▪ Does the destination have enough hotel rooms to support the bid? (For instance, hosting of the Olympic Games requires a minimum hotel bed capacity of 40,000 beds. The GTA offers a total of 42,000 hotel rooms, while Downtown Toronto offers 16,000 rooms, Niagara Falls has 14,000 rooms and Ottawa has 10,000 rooms)</li> <li>▪ Will the event help to accelerate community infrastructure needs? (Note: Best practices indicate that a major event can only be a successful accelerator for urban development if it is integrated into the city’s long-term strategy. As such, the urban strategy must be in place first, and then the city should look for the right kind of events to coincide with the cities’ competitive infrastructure, investment and quality of life needs).</li> <li>▪ Does the event focus on shoulder and off peak seasons?</li> </ul>	<p>✓</p>	

**Figure 9-4  
POTENTIAL “LENSES” FOR ONTARIO EVENTS**

Lenses			Major Event Strategy	Emerging Major Festival & Event Development Strategy
5.	<b>Sustainability Lens</b>	<p><i>Event Organizing Team</i> Successful Event Organizing Teams can be expected to build on the experience of previous bid and event organizers in order to develop best practices and learn from their mistakes. As an example, the Calgary Olympics was one of the most financially successful Olympics, because the Event Organizing Team learned from the mistakes of past Olympics, including the financial losses of the Montreal Games, by partnering with numerous stakeholders including the U.S. television network, ABC, which paid for exclusive transmission rights.</p> <p><i>Event Partnerships—foster development of ongoing partnerships and networks amongst key stakeholders</i></p> <ul style="list-style-type: none"> <li>▪ Does the event have public and private sector support? At what level? (e.g., federal, provincial, municipal, destination marketing organization, event organization, event venue, private sector, etc.)</li> <li>▪ Will the event stimulate public-private partnerships? (Note: This is particularly relevant for funding purposes, as the event may provide destinations with the ability to achieve needed facilities and infrastructure that may not otherwise obtain)</li> </ul> <p><i>Events that Ontario can own and develop and potentially export elsewhere.</i> As an example, Nuit Blanche which was developed in Paris and has since been exported to various cities, including Toronto; Montreal’s Comedy Festival which has been exported to Toronto; and the Venice Biennale which is considering Cambridge as a potential location for its Architectural exhibition.</p>	✓	
			✓	✓
			✓	✓

<b>Figure 9-4 POTENTIAL “LENSES” FOR ONTARIO EVENTS</b>			
<b>Lenses</b>		<b>Major Event Strategy</b>	<b>Emerging Major Festival &amp; Event Development Strategy</b>
	<i>Events that have the ability to maximize opportunities leading up to and beyond the event.</i>	✓	
<b>6. Pride of Place Lens</b>	<p><i>Stimulate sense of civic pride.</i> Hosting the 1988 Winter Olympics in Calgary changed the future of Calgary, transforming the image of Calgary from a sleepy, western town to an international city, with the majority of the population supporting the event, instilling an enormous sense of civic pride.</p> <p><i>Build volunteer network and encourage community involvement</i></p> <ul style="list-style-type: none"> <li>▪ Does the event have the capacity to create a committed volunteer force? (Note: Successful events provide volunteers with the experiences they seek, such as excitement, a once in a lifetime opportunity, the ability to use their skills, expanding personal networks, achieve job-related competencies, provide them with the ability to help their community, region or country)</li> </ul> <p><i>Celebration of diversity and enhanced social cohesion</i></p> <ul style="list-style-type: none"> <li>▪ Is the event accessible to a wide range of communities and groups, in terms of content and location?</li> <li>▪ Does the event celebrate diversity and enhance social cohesion?</li> </ul>	<p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>
	<p><i>International prestige/destination profile</i></p> <ul style="list-style-type: none"> <li>▪ Does the event provide an international destination profile for the host community?</li> </ul>	✓	

<b>Figure 9-4 POTENTIAL “LENSES” FOR ONTARIO EVENTS</b>				
<b>Lenses</b>			<b>Major Event Strategy</b>	<b>Emerging Major Festival &amp; Event Development Strategy</b>
7.	<b>Legacy Building Lens</b>	<p><i>Alignment with Economic and Urban Renewal Strategies</i></p> <p>Building successful legacies requires proper planning; they must be embedded in an overall long-term strategy for the hosting city or destination; they require alignment with Economic Strategies and Urban Planning Renewal Strategies, which consider a 20 to 25-year planning horizon. Most importantly, significant investments, which are made before and during the event, must also make sense after the event.</p> <p>London, England which has been awarded the next summer Olympics, is following a best practice strategy by planning for the legacy of the Games. The Lower Lea Valley, a 1,450 hectare area on the east side of the city where the Games will be held, is in critical need of investment and urban regeneration. The polluted valley has become a major regeneration project, which will provide 30,000 to 40,000 new houses for Londoners after the Games; up to 50,000 new jobs; and a new park that will offer high quality urban space with water areas and wildlife habitats.<sup>45</sup></p> <p><i>“The London 2012 Games provide the opportunity for regeneration and a lasting legacy for new and existing communities in East London for generations to come.”</i></p> <p>John Armit CBE, Chairman, Olympic Delivery Authority</p>	✓	

Figure 9-4 POTENTIAL "LENSSES" FOR ONTARIO EVENTS		
Lenses	Major Event Strategy	Emerging Major Festival & Event Development Strategy
<p><i>Sporting Legacy</i></p> <ul style="list-style-type: none"> <li>▪ Will the event provide world-class sporting facilities, events and participation in sport?</li> <li>▪ Will the development of world-class sporting facilities provide the stimulus for a long-term strategy to promote amateur sporting events at the local, provincial, national and international level?</li> </ul> <p><i>Cultural Legacy</i></p> <ul style="list-style-type: none"> <li>▪ Will the event provide world-class cultural facilities, cultural programs, and participation in culture?</li> </ul> <p><i>Social/Infrastructure Legacy</i></p> <ul style="list-style-type: none"> <li>▪ What improvements can the destination realize through the potential addition of social housing, airport link, waterfront development, and public transit improvements?</li> </ul> <p><i>Environmental Legacy</i></p> <ul style="list-style-type: none"> <li>▪ Does the event put an emphasis on sustainable development?</li> <li>▪ Will the event create new green spaces?</li> <li>▪ Will the event provide potential improvements to waste management, energy efficiencies, and water management?</li> </ul>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	
<p><i>Awareness Legacy</i></p> <p>While hosting a major event draws attention to the destination, a heightened awareness of the bidding city can also be gained, even if the bid is lost.</p>	<p>✓</p>	

<b>Figure 9-4 POTENTIAL “LENSES” FOR ONTARIO EVENTS</b>		
<b>Lenses</b>	<b>Major Event Strategy</b>	<b>Emerging Major Festival &amp; Event Development Strategy</b>
	✓	
	<p><i>Business and Technology Legacy</i> Major events can help a destination adopt new technologies and attract new businesses. For example, alternative resources of energy that do not pollute the environment, waste management technologies, architectural and design firms which develop sporting and cultural legacies.</p>	

**Recommendation 6: Ontario’s Funding Priorities - Two-Tier Funding for Festivals and Events**

As summarized previously in Section 8.0, best practice research in key comparable jurisdictions to Ontario (with respect to size, urban/rural mix and political structure) suggests that successful jurisdictions have targeted major events separately from smaller, regional and/or local events.

Given these best practice results, and considering Ontario’s current strategic goals and existing resources for regional/local festivals and events, it is recommended that the province employ a two-tier funding strategy for festivals and events:

**Tier-1 Major Events Tourism Funding Program** - To attract, develop and support major festivals and events that generate high levels of tourism revenue.

**Tier-2 – Emerging Major Festival and Event Development Funding Program** - To attract, develop and support emerging festivals and events that have the potential to generate medium to high levels of tourism revenue.

**Tier-1 Major Events Tourism Funding Program**

For Ontario to be recognized at an international level, increase net incremental visitation, and raise Ontario's international profile as a premier event host and tourism destination, the province should focus its resources on targeting new mega and major events and growing existing hallmark events as the primary goals for this program.

Existing events that could potentially fall under a potential Major Events Tourism Program could include *TIFF, Caribana, Oktoberfest* and *Winterlude* as these are “iconic” or hallmark events with an existing national and international tourism focus and are not locally-oriented, community-based events.

**Goals of a Potential *Major Events Tourism Program*:**

- To foster major event tourism in Ontario and increase Ontario's international tourism destination profile by identifying, bidding and hosting mega and major events in the business, culture and sports sectors, including: *Summer Olympics, Pan Am Games*, large-international conferences, such as the *AIDS Conference*, etc.
- To foster arts, culture and sport development through continued investment in the development and support of Ontario's existing hallmark events, such as the *Roger's Cup Tournament, Toronto Grand Prix, TIFF, Caribana, Pride, LuminaTO*, etc.

It would be important for the province to place priorities around mega and major events that could help to tailor appropriate tourism products and infrastructure in Ontario.

**Tier-2 – Emerging Major Festival and Event Development Program**

Ontario should also focus its resources on supporting emerging festivals and events which have the potential to transition to the hallmark/iconic event level and eventually be captured in a potential major event tourism funding program. Existing Ontario events that could potentially fall under this type of program could include: *Just for Laughs Festival, Salsa Festival, etc.*

Within a potential Emerging Major Festivals and Events Development Program, consideration should also be given to incubating ideas for new festivals and events from the concept stage, which may have the potential to grow into regional and/or major national and international events.

A potential Emerging Festivals and Events Development Program would identify the characteristics and/or situations in which local festivals could transition from community-based events to ones with a national and international tourist draw. Such characteristics and/or situations could include:

- a festival's content and/or growth curve;
- ability to piggy back on tourism activity associated with major and mega events;
- niche product event/potential; and
- medium to high tourism revenue potential.

**Goals of a potential *Emerging Festivals & Events Development Program*:**

- To enhance existing regional and local Ontario festivals and events that have the greatest revenue potential and tourism benefits to transition to Hallmark Events, with a national or international tourist draw.
- To develop and nurture new events for Ontario with the potential to grow into Hallmark Events.

While other festivals and events that largely draw their attendance levels from local and regional sources should continue to receive support from the variety of grant programs that are already available in Ontario, the Ministry of Tourism should focus on events that generate or have the potential to generate provincial, national or international tourism demand, as indicated in the suggested lenses identified in Figure 9-4 under the Emerging Festivals and Events Strategy.

**Recommendation 7: Suggested Strategic Approaches to Two-Tier Event Strategy**

The assessment and evaluation of event opportunities for Ontario should be done within the framework of Event Tourism Strategies, which are designed to attain the goals of a potential *Major Event Tourism Strategy* and the *Emerging Festivals and Events Development Strategy*. Based on best practice research and a SWOT analysis for Ontario, consideration could be given to researching and developing one or more of the following suggested event strategies for the Province. Once strategies are put in place, then policies should be developed in order to implement them. As previously mentioned, Ontario has a *Sport Hosting Policy* for sporting events, however, it is our understanding that there are no policies that currently govern the attraction and hosting of cultural and large business events.

### **Major Events Strategy**

#### **Urban Renewal Strategy**

- To identify, attract and support mega events that align with long term urban strategies and can be bid on and hosted by Ontario destinations: Non Recurring Sporting Events (Pan Am Games); and, Non Recurring Culture Events (Expo, Bollywood Awards)
- To strengthen strategic alliances with other Golden Horseshoe cities and key organizations, where appropriate, for stronger mega event bids.

#### **Sport Tourism Strategy**

- To invest in proven events by enhancing existing Hallmark/Iconic Sporting Events (i.e., Recurring Sporting Events, such as Honda Indy, Rogers Cup).
- To win a Mega Sporting Event which will in turn provide the stimulus for a long-term strategy to promote amateur sporting events through the ongoing use of sporting facility legacies.
- To identify, bid on and host Major Sporting Events to Ontario by utilizing existing sport venue infrastructure; the study process has identified a long list of 980 sporting events which are available for bidding over the next 15 years, from 2009 to 2021 period.

#### **Cultural Renewal Strategy**

- To invest in Commemorative Events celebrating the history of Ontario.
- To invest in proven Recurring Cultural Events (TIFF, Pride, Caribana, Oktoberfest).
- To feature events which promote Ontario's diverse ethnic cultures, promote authenticity and utilize Ontario's prominent cultural venues.

#### **Business Event Strategy**

- To support bidding and hosting of Major Business Events, through partnerships with the host DMO.
- To promote Ontario's best in class resorts which offer self-contained sites as prime locations to host meetings requiring high levels of security – i.e., G8 Summit, G7 Conference, etc.

### **Emerging Major Festival & Event Development Strategy**

#### **Regional Development Strategy**

- As suggested previously, a secondary focus for MTOUR could be placed on the development and support of regional and local festivals and events with the potential to become Hallmark events. These are generally events that initially fall short of the event appraisal lens criteria - particularly with respect to the Tourism Lens, but have the potential to satisfy full criteria at a future date.
- As identified in the best practice research, it is often necessary to have a solid base of regional and local events to underpin the Mega and Hallmark Events in a destination. As identified by Getz, Regional and Local Events create widespread benefits for the greater region or province, but do not tend to attract high levels of tourist demand or generate significant levels of economic returns for a destination. Nevertheless, local Community Festivals and Events have the ability to transition to a Hallmark Event.

#### **Event Incubation Strategy**

- Currently in Ontario, there are a variety of funding programs that support the development of regional and local events, as there is minimal incentive provided through these programs for fostering profitability and out-of-province tourism generation. In association with the Major Events Tourism Strategy, it is recommended that policies be developed to incubate local and regional events that may have the potential to transition to hallmark events. Policies could also be developed to assist in the incubation of event opportunities:



- Through a Regional Festival and Event Tourism Development Strategy, MTOUR can help to define and brand places by supporting recurring “iconic” regional and local Festivals (Niagara Grape and Wine Festival, Winterlude).
- This type of strategy requires key strategic partnerships in order to establish the most appropriate criteria for selecting events for further development or incubation (i.e., Ontario Arts Council, Sport Alliance of Ontario, etc.). It would be necessary to identify the characteristics and/or situations in which local or regional festivals could transition from community-based events to ones with a national or international tourist draw.
- Because of their organic nature, cultural events have a very short planning horizon – typically two years in advance at the earliest - and it is very difficult to take a cookie cutter approach to sourcing them. Typically, cultural events grow out of the mandate of a facility or a discipline. Best practice research indicates that several jurisdictions such as Ireland have put aside a dedicated fund towards developing two to three major events per year.
- Based on our interviews with key stakeholders during the study process, together with the SWOT analysis, there are a number of recurring “iconic” regional and local events & festivals that currently fall short of the full lens criteria, but for a variety of reasons may have the potential to grow into hallmark events, including: *Niagara Grape and Wine Festival, Winterlude, Canada Day Celebrations in Ottawa, Kitchener-Waterloo Oktoberfest, Just for Laughs Festival, Ottawa Race Weekend and Bell Cup Tournament.*
- Existing events in the GTA based on ethnic diversity, such as: Salsa Festival on St. Clair, Taste of the Danforth, Portuguese Festival, *Ukrainian Festival, South East Asian Festival and MuslimFest*
- *World Stage Festival* at Harbourfront, which was on its way to becoming internationally acclaimed, prior to losing its major sponsor in 2003.
- *North by Northwest Music Festival*, which is held the first week of June. It is the music industries equivalent to TIFF, and is comparable to South by Southwest Music Festival, which is held in Austin, Texas each March (Austin triples in size during the festival).
- Chum City, Moses Znaimer “*Idea Festival*,” which is a future think tank about what is around the corner in the development of various sectors (i.e., Green Technology, digital, scientific and medical advancements). This type of festival could tie into MARS, universities and other think tanks in the province.
- *Marshall McLuhan Festival*, which is a marquis event that focuses on the creative agenda. This type of festival could tie into the Provincial government’s Creativity economic platform<sup>46</sup>.
- *Nuit Blanche* was developed by the City of Toronto and is modeled after the original event in Paris, France. The event is in its 3rd year of operation and held is in late September or early October. While the program is currently largely community-driven, additional resources invested in programming could increase its tourist appeal.
- *Hot Docs* is an industry event for documentaries, which has international acclaim, and may have the potential to develop a wider tourism audience.
- A cultural industries event currently does not exist in Ontario but could be the genesis of a leading event in emerging technologies in digital, internet, music, film, technology, etc., which could grow to become equivalent to MIDEM (Marché International du Disque et de l'Édition Musicale, the world's largest music industry trade fair, which has been held annually at the Palais des Festivals

in Cannes, France, since 1967). In the case of MIDEM, bringing together musicians, businesspeople, cultural policy makers, and journalists from many countries, provides a forum for business talks, discussing political and legal issues, and showcasing new artists, musical trends and music-related products. According to Foreign Policy magazine, A.T. Kearney Consultants and The Chicago Council on Global Affairs, Toronto ranks as the world's fourth best city, behind London, Paris, and New York to experience culture<sup>47</sup> -- the creation of a major Cultural Industries event could build on this recognition.

Other potential areas for consideration could include: Culinary Symposium; Canada Day Week; Science Trail; Design and Fashion Events; Cambridge Biennale of Architecture; and, Children's Festival.

### Cluster Strategy

- Another avenue being explored to manage the needs and interests of smaller local arts, culture and heritage festivals or events within a broader strategy is to *bundle them* under one or another umbrella (theme, geography or time) so as to generate greater impact and maximize economies of scale and collective promotions.
- However, best practice research on the *Fêtes du Québec Maritime* illustrates how a number of small-scale activities, even though they may have a unifying concept, were unable to play a significant role in attracting tourists.
- The study concluded that spreading government resources over a large number of events tends to have a “watering down” effect, which hinders excellence and curbs the development of events with a real growth potential for communities and regional economies. Furthermore, the study recommended that federal funding for an event should only be given to those regions that also show tangible evidence of commitment and support of the event at the regional level itself.
- While bundling smaller events under one umbrella may not be an effective strategy, best practices show that marketing the Premier Festivals and Events can provide an effective event marketing strategy, as evidenced by Quebec's REMI association.

## 9.5 Implementation Considerations

### Potential Roles for Province, DMO and Host Community/Venue/Organization

The literature review indicates that Getz and Frisby<sup>48</sup> identified the following four optional roles and strategic choices for local government policy-making in the events sector:

#### Produce Events

- Government or agencies produce and own events.

#### Equity Partner in Events

- Government does not produce events, but invests capital in events.

#### Sponsor Events

- Government acts like a corporation and makes sponsorship deals for specific benefits (such as destination marketing).

#### Facilitate Events

- Through a range of policy initiatives, governments facilitate event creation or operations, by providing a “facilitation assistance” role in a number of potential areas, including:

- *Financial:* Grants, loans, lines of credit, debt relief, subsidies (i.e., increased security, traffic services, use of venues), tax relief, awards and prizes;
- *Technical:* Professional advice, training, research and information, office space;
- *Marketing:* Overall or event-specific promotions, inclusion of government materials, websites;
- *Regulatory:* Fast-tracking, release from onerous obligations;
- *Infrastructure:* Provision and improvement of necessary services (roads, water, etc.) and public venues (e.g., theatres, arenas, convention centres, parks).<sup>49</sup>

The basic premise to the research findings is that some level of government policy or direct intervention in the events sector is both desired and practical. Given our best practice research, it is suggested that the various event public and private sector stakeholders consider undertaking the following roles in developing Ontario's events sector:

### **Lead Provincial Role**

There is currently a lack of co-ordination and no clear strategy amongst the three levels of government as to which bids to attract and support. As such, the Provincial Government should take a Lead Facilitation and Equity Partner role in coordinating partnerships to identify, bid on and host non recurring Mega and Hallmark Event opportunities in the Sport and Culture sectors as well as Commemorative Events for the Province.

Based on best practices in other jurisdictions, it is suggested that the Provincial Government works within an event partnership to provide assistance for Mega and Hallmark Event opportunities through: Financial Support (grants, loans, in-kind for bidding process, public and public/private infrastructure requirements, bid guarantees, etc.); Co-ordination and Lobbying Support; Marketing Support (promotions, marketing plan, market research); and, Material Support (provision of equipment, staff, use of venues / offices).

### **DMO Role**

Destination Marketing Organizations should continue to take the lead role in attracting and sponsoring bids for any non-recurring event opportunities within the Business sector (i.e., attracting AIDS Conference, G8 Summit, etc.) with the Province providing a supporting Facilitation Role.

### **Host Community/Organization/Venue Role**

Host Community/Organization and/or Venue should continue to take the lead role in **producing** recurring Hallmark Events within the Sport and Culture sectors; producing existing regional and local festivals and events that have the potential to become Hallmark Events and Festivals; and incubating new events and festivals.

### **Supporting Provincial Facilitation Role**

The province should play a Facilitation Role in terms of:

- Enhancing existing Hallmark Events;
- Enhancing existing Regional/Community Festivals and Events that have the potential to become Hallmark Events; and,
- Fostering new ideas for sport, culture and business festivals and events that offer the greatest economic potential and tourism benefits.

The province should take a facilitation role in creating of policies and programs related to funding, marketing, research and benchmarking of these events. One example of how this might be operationalized is to provide an operating fund in order to support representatives of significant Ontario cultural facilities or disciplines to go out and seek out travelling exhibitions or ideas for events that could be developed by attending professional association conferences and trade shows, touring events that are occurring elsewhere, etc. In other words, let the discipline experts source what is happening and the province should play a financial supporting role.

### **Organizational Framework**

Based on cross-jurisdictional research, most successful event destinations create an arms-length major event organization to promote, bid on, develop, or co-ordinate the events sector for strategic purposes. At one level, Destination Marketing Organizations, such as Tourism Toronto, Tourism Ottawa, and Tourism London form an integral part of the organizational framework for events by targeting meetings and conventions for their respective cities and convention venues. On another level, Sports Commissions and Festival Committees at the municipal level have been created to manage events as businesses.

For mega and hallmark events, an event development corporation or agency is typically formed, which adheres to a strict plan and puts in place an effective control system for the event. As displayed by the best practices of Australia, every state in Australia has an event development corporation or unit within the tourism commission. All major cities and resorts in New Zealand have an event-specific staff position or unit. In the U.K., many destinations have professional event staff within culture or recreation departments or within tourism agencies, while other organizations are created as arms-length entities. For instance, as part of the implementation process for the *Major Events Strategy* in Scotland, a new body – *EventScotland* – was established to give central coordination and secure major events and to work closely with other private and public sector organizations that would be involved in these events. This agency remains arms length from government. Essentially, *EventScotland* was developed to implement the *Major Events Strategy*, and has since brought in sponsorship from private sector companies and other public sector agencies to co-fund events.

With respect to funding and the development of regional programs for festivals and events, best practice research indicates that most jurisdictions consider this a separate priority from the attraction of major international events. Since the purpose of Regional Festival Programs is primarily focused on increasing domestic travel and boosting local community pride, budgets tend to be smaller, and the Provincial government is normally not involved directly. In terms of organizational structure, regional/community festivals and events often remain under the jurisdiction of regional or municipal government, or arms-length agencies, and may or may not be connected to the major event strategies.

In the case of Scotland, the same arms length organization that is in charge of securing major international events - *EventScotland* - is also responsible for administering the Regional Programme. This program is in place to fund events that will generate economic benefits for specific regions of Scotland and generally boost domestic tourism. In New Zealand, *New Zealand Major Events* focuses on large-scale tourism-generating events that are primarily sporting events. This is separate from *Creative New Zealand*, which offers grants for arts projects that focus on the development of New Zealand arts and artists, and are stand-alone arts activities/projects with a start and an end point, over a clearly defined period of time.

In summary, competitive jurisdictions that have seen growth in their tourism volumes and improvement to their destination profile through major international events have developed a well-defined organizational structure with clear strategic goals and objectives. Given the Ontario Government's strategic priorities and the existing lack of coordinated funding structures and policies around the festival and event sector, it is suggested that MTOUR focus its attention on leadership and coordination, and on defining an action plan to target and enhance tourism-generating major events, with a parallel program to develop Regional/Community festivals which have the potential to become major tourist-generating events.

## **Event Funding Considerations**

### **Government Involvement in Bids**

The world of bidding on international events is increasingly competitive and expensive. Best practice research in the UK has identified that a great deal of time is required to plan and gain support from financial and political backers in preparing a bid for staging a major event. For many of the world's major sporting events, bids must be submitted several years in advance of the date of the event, and the preparation of bids can start several years before that. Bids or events often fail because insufficient time is allotted for thorough planning and feasibility studies.

According to Getz (2007), "planned events cross a number of policy fields, often involving two or three levels of government, so it will be necessary to develop liaison between agencies on event-related issues, and to develop integrating policies."<sup>50</sup>

Large-scale events like the Olympics or Pan Am Games are normally held in large cities with global level infrastructure and a population density to support the events. Hence, attracting, securing and hosting major international events cannot be the responsibility of one exclusive organization. To successfully win a bid for major international events, there must be a demonstrated willingness and alignment of all governments.

This means governments are key and necessary actors if large-scale events (or even smaller, international scale events) are to be secured and hosted. Partnerships between governments are necessary if such events are to be secured. Quebec based studies, undertaken by the federal government point to government contribution levels of 50% and more as not being unusual in different countries. World-wide, most jurisdictions, whatever their geographic level of jurisdiction, fund large scale event underwriting and financial support commitments from general revenues rather than dedicated or "earmarked" revenue sources.

Numerous national and sub-national jurisdictions have ongoing government allocated funds as well as government arms and agencies devoted to larger scale event development and event operational funding (see Victoria, Australia; New Zealand; Scotland) and earlier studies undertaken by the Ontario Government have also recommended such an approach (KPMG Study). Larger events are sometimes also funded indirectly – also from general revenues - through regional development funding (see Quebec, Atlantic Canada, Yorkshire, Scotland).

Many jurisdictions also offer supplemental tourism marketing support for events based on the assumption that the underlying public sector or private sector revenue for "event product" is in place, or being provided by some other means. Some jurisdictions (see Chicago, British Columbia) fund this specialized form of support through "earmarked" tourism related taxes.

In Canada, there is also a specialized intergovernmental system for larger scale international amateur sport event funding, which is funded out of general revenues.

### **Establishing Cost-Sharing Agreements**

The majority of the tax benefits from hosting major international events in the Canadian context are derived as a result of event operation, construction, related foreign direct investment and tourism spending, which accrue to the Province of Ontario and the Government of Canada (personal income tax, provincial sales tax, GST, corporate profit taxes, tobacco and liquor taxes). There are also smaller and less immediate property tax benefits for municipalities due to long run wealth and construction effects on property assessment rolls. Under present legislative arrangements, the private accommodation industry in

Ontario accrues additional amounts of voluntary levies arising from incremental tourist accommodation expenditure arising the holding of large events.

In contrast, the majority of the spill over benefits accrue in descending order to the residents and businesses located in the geographical place where the large-scale event is held, followed by the region where the event is held, followed by the Province where the event is held, followed by Canada. Moreover, the bidding process is predominately co-ordinated at the community level. Community residents, community businesses and local municipalities are the ones that most heavily feel the operational impacts of planning for and hosting larger events.

It is suggested that cost-sharing agreements for funding large-scale international event bids reflect the different capacities that the levels of government have to fund these bids in some combination with the differential benefits that accrue to the single residents who are citizens of all three places.

It is also clear based on large event project practice within Canada, and practice where there are significant areas of ongoing overlapping joint government responsibility (for example in Toronto on the waterfront) that the most effective way of supporting government partnerships is to establish a joint management and funding mechanism involving those same governments.

### **Financial Guarantees for Mega Events**

In most cases, the municipality (or joint municipalities) identify the mega event bid opportunity and undertakes a due diligence process of the opportunity. Based on a positive study outcome, the municipality looks for the support of the province. With provincial support in hand, the municipal council must endorse the recommendation to bid, then a review of the bid is conducted by the Government of Canada through the Ministry of Canadian Heritage, with the eventual submission of recommendations to the Federal Cabinet for approval.

Funding of the bid stage is usually cost-shared between the municipality(ies), the province and the private sector. However, prior to bidding on large-scale events, it is also necessary for the municipality (ies) to seek an agreement with other levels of government (province and federal) on a financial guarantee, capital funding framework and a corporate governance structure.

For any large-scale bids, it is necessary to enter into discussions with the provincial and federal governments to secure a financial guarantee that protects the municipality from cost overruns, revenue shortfalls, or any other operating deficits.

### **Creating Sustainable Funding for Events**

Given that various grant programs and other sources of funding are already in place without any significant coordination in policy development, the suggested role of MTOUR would be to lead and support partners in securing new events for Ontario, and to give support for the incubation of potential tourism-generating events (rather than to replace or duplicate existing funding sources).

One of the problems associated with providing operating subsidies/grants to the event sector is the annual nature of the grant programs, which limits event organizers to a one-year planning horizon. Furthermore, it is often difficult for organizers of smaller festivals and events to prepare a robust application for grant programs without assistance particularly under tight deadlines. In the case of the *Galway Arts Festival*, a few years of increased funding geared towards marketing outside the local region was enough to spark the interest of larger public agencies like the National Arts Council. This support helped the *Galway Arts Festival* to become the largest national arts festival in Ireland. This example demonstrates the importance of sustained funding.

In order to address the sustainability of events in Ontario, it is suggested that consideration be given to providing a broader base of funding (i.e., up to three years) provided that the event can successfully meet event performance measures through an accepted research and evaluation methodology. As an example from our best practice research, *Tourisme Québec* funds events with an operating budget of over \$1 Million or more but an economic impact study must be produced every three years by an independent firm and the event must demonstrate levels of tourism traffic.

# APPENDICIES



**APPENDIX A:  
VARIOUS DEFINITIONS OF EVENTS AND EVENT TOURISM**

## APPENDIX A: Various Definitions of Events and Event Tourism

### Collins English Dictionary

- Festival**
1. a day or period set aside for celebration or feasting, esp. one of religious significance.
  2. any occasion for celebration, esp. one which commemorates an anniversary or other significant event.
  3. an organized series of special events and performances, usually in one place.
- Event**
1. anything that takes place or happens, esp. something important; happening; incident.
  2. the actual or final outcome.
  3. any one contest in a program of sporting or other contests - the high jump is his event.

*"An event can, in its broadest definition, encompass anything attracting an audience by appealing to specific tastes, desires or needs. However, in the context of travel and tourism, this broad spectrum becomes limited to that segment of the industry that is unique to a specific geographic location and is limited in duration." (Carey, 1994)<sup>51</sup>*

*"Event tourists are those people who visit a destination for the primary purpose of participating in or viewing an event." (Turco, Riley & Swart, 2002)<sup>52</sup>*

### Department of Canadian Heritage Arts, Culture and Sport programs: (Source: [www.pch.gc.ca](http://www.pch.gc.ca))

#### Building Communities through Arts and Heritage

Each of Canada's communities is unique, and each is uniquely Canadian. This includes your community!

Communities are shaped by geography, history, their founders, and those who came to live there. They continue to grow and change as the people who live there now build on those foundations.

**The Building Communities through Arts and Heritage program** was created to help you celebrate your community, its past and its present. The Program will increase opportunities, through festivals or other events and activities, for your local artists and artisans to be involved in their community and for local groups to commemorate your local history and heritage.

Eligible events and activities must be local - created by and for your community. They must be open and accessible to the public and strongly encourage and promote the participation of everyone in your community.

The Program has two components:

- Local Arts and Heritage Festivals - Festivals, events and activities that involve your whole community, give opportunities to local artists and artisans and/or celebrate local history and heritage; and,
- Community Historical Anniversaries Programming - One-time commemoration through festivals or other activities that celebrate a major anniversary of a significant local person or event.

#### Canadian Heritage's Involvement in International Sport

*The importance and mandate of international sport with regard to relations between Canada and other countries was firmly entrenched within the Department of Canadian Heritage in 2003 via two government documents:*

**The Physical Activity and Sport Act** gives Canadian Heritage the mandate to "encourage the promotion of sport as a tool of individual and social development in Canada, and abroad," as well as the "authority to enter into international agreements to encourage, promote, and develop physical activity and sport". (Bill C-54 - An Act to promote physical activity and sport, Policies - Section 5 (k), and Section 8).

### **The Canadian Sport Policy (CSP):**

- Recognizes the federal role to promote Canadian Sport and its values in international circumstances;
- Envisions that Canadians will be recognized internationally for their excellence in competitions and for their leadership in sport and social development through sport, in Canada and abroad;
- Sets as goals the strengthening of international strategies to promote Canadian values and sport programs, keeping abreast of leading edge developments, and maximizing the benefits of sport.

### **Activities of the International Sport Directorate**

The International Sport Directorate seeks to enhance Canadian influence in the international sport milieu. As well, it gathers and monitors information on the global sport policy environment, and promotes best practices in policy and program development in Canada. The International Sport Strategy guides the work of the International Sport Directorate.

#### Current Activities

Participation in key international sport fora; e.g., Commonwealth Sport Ministers, the Sport Council of the Americas (only available in Spanish), etc.;

- Bilateral sport agreements with selected countries;
- Participation in international fora relating to specific sport policy issues such as, World Anti-Doping Agency (WADA), Sport for Development and Peace International Working Group, the International Working Group on Women and Sport (IWG);
- Advocating for sport with key partners such as UNESCO, the Canadian International Development Agency (CIDA), Foreign Affairs and International Trade Canada (DFAIT), etc.;
- Creating opportunities for Canadian and international exchange of Canadian and international expertise – roundtables, expert exchanges, working groups, etc.;
- Creating strategic alliances to advance Canadian sport interests.

#### Key Partners

The International Sport Directorate achieves its mandate and implements a series of bilateral and multilateral initiatives through partnerships and strategic alliances. Current partners include:

- Canadian Heritage Branches: Sport Canada, and the Vancouver 2010 Olympic and Paralympic Secretariat.
- Federal departments: Foreign Affairs and International Trade Canada (DFAIT), and the Canadian International Development Agency (CIDA).
- National Sport Organizations and Multisport Organizations, and their international affiliates: the Canadian Centre for Ethics in Sport, the Canadian Sport Centres, and Commonwealth Games Canada.
- Bilateral partner countries: Brazil, China, Cuba, France, Russia, and South Africa.
- International and intergovernmental bodies: the United Nations, the Organization of American States (OAS), the Commonwealth Secretariat; the Council of Europe, Conference of the Youth and Sports Ministers of French-speaking Countries (CONFESJES) (only available in French), the Sports Council of the Americas (only available in Spanish), etc.
- International organizations: Right to Play, the World Anti-Doping Agency (WADA).

PCH also has an additional program that provides policy and support for participation in international expositions such as world fairs. The Government of Canada is clearly committed to advancing Canada's place in the world. Canada must, therefore, pursue effective strategies to promote its interests and project its values globally. International expositions are unique forums where Canadians share the stage with the world's best and showcase to the world what the Canadian model of society can achieve. The federal government's commitment to financially support and participate in international expositions will lead to significant benefits and legacies for Canadians.

By providing a stable funding framework for future expositions, the Government continues to ensure a more strategic and effective approach to planning its participation in these events. Longer term planning

will ensure broader-based participation and consultations and more solid partnerships with Canadian citizens, other levels of government and the private sector to help develop Canada's presence.

### **Organizing Canada's Participation**

Canada participates in international expositions to showcase its cultural achievements, linguistic duality, diversity and values, as well as its technological and scientific expertise in a broad range of areas. Participation is coordinated by the International Expositions Branch of the Department of Canadian Heritage.

### **Mandate**

The role of the International Expositions Branch is threefold:

- To represent Canada as a member nation at the Bureau international des expositions / International bureau of expositions (B.I.E.).
- To plan, implement and manage Canada's participation in expositions held abroad.
- To fulfill the requirements of the B.I.E., convention when expositions are held in Canada.

### **OTMPC Tourism Event Marketing Partnership Program (TEMPP)**

OTMPC has established three funding levels for its Tourism Event Marketing Partnership Program (TEMPP) based on an event's marketing budget, duration and other characteristics as shown below:

#### **Tier 1**

Funding of up to \$15,000 is available for regional events and festivals with a marketing budget of up to \$50,000 and requesting assistance for marketing activities beyond 100km from the location of the event or festival.

#### **Tier 2**

Funding of up to \$50,000 is available for events and festivals, which are two days or longer in duration, and with a marketing budget between \$51,000 and \$170,000 and marketing on a provincial, national or international scale. These events and festivals must provide evidence of having funding or marketing support from the local Destination Marketing Organization (DMO), be promoted within the DMO marketing initiatives and have developed relationships with the local tourism industry, i.e., attractions, accommodations, restaurants, etc.

#### **Tier 3**

Funding of up to \$200,000 is available for major International events and festivals, which are three days or longer in duration, and with a marketing budget beyond \$170,000. Festival funding beyond \$50,000 recognizes the tourism potential of larger iconic events. Multi-year marketing strategies will be considered, however, funding will be confirmed on an annual basis. These internationally recognized events and festivals must meet all of the specified criteria as follows:

- Must be promoted and/or televised internationally;
- Must develop and sell overnight consumer packages to the event (a package may include the linking of a number of individual services/products into a single experience, typically for a single price);
- Must generate significant tourism visitation from destinations beyond Canada;
- Must have a minimum attendance of 150,000;
- Must have a Media relations component that attracts international media to the event;
- Provides Ontario Tourism with media/branding opportunities via television, radio, or print advertising.

**APPENDIX B:**  
**SIZE OF ONTARIO'S FESTIVALS & EVENTS SECTOR**

## APPENDIX B: Size of Ontario's Festivals & Events Sector

The Statistics Canada International Travel Survey for USA and Overseas visitors to Canada in the 2006 reference year and the Canadian Travel Survey for the 2004 reference year were used to generate estimates of *event tourist* volumes and spending. The 2004 CTS reference year had to be used instead of the 2006 Travel Survey of Residents of Canada (TSRC) because activity data in the TSRC are not suitable for the project's purposes.

An *event tourist* was defined as an overnight visitor to a location who claimed to have gone to (1) a sporting event and/or (2) a festival/fair while on his/her trip in Canada. To maximize the probability that the event attendance actually took place in a specific geographic area (i.e., *Ontario* or the *Toronto CMA*), a further condition was applied: all nights on the trip had to be in the specific geographic area of interest (i.e., *Ontario* or the *Toronto CMA*). This additional requirement is necessary because the Statistics Canada studies ask respondents about activities *on the trip*, with no reference to *where* they may have taken place.

Analogous data were generated for Ontario, Québec and British Columbia and for three major census metropolitan areas: Toronto, Montréal and Vancouver.

Findings are presented for *all overnight event tourists* and for the *inbound* portion of this market. Inbound refers to non-residents of the location of interest. Thus, Ontario inbound event tourists are those who reside outside Canada (USA, Overseas) and those living in Canadian provinces *other than* Ontario.

### Ontario

Assuming that Ontario attracted about 44.3 million visitors who spent all the nights on their trip *within* the province. About 3-in-4 of these tourists would be *residents* of Ontario (32.7 million) and the balance (11.6 million) would be tourists from other Canadian provinces, the U.S.A. and other countries [see Table A].

### Inbound Event Tourists to Ontario

Among these 11.6 million inbound tourists, approximately 11 percent (1.3 million) say they went to a fair, festival or sporting event while on their trip. Thus, at the outside margins, the *event tourism market* for Ontario would be about 1.3 million tourists from outside the province.

<b>Table A: Order-of-Magnitude Estimates</b>	
Overnight Person Visits With All Nights Spent in Ontario	44.3 million
By Ontario Residents	32.7 million
Ontario Resident Event Tourists	3.8 million
By Inbound Tourists	11.6 million
Inbound Event Tourists	1.3 million

The extent to which an event was instrumental in an inbound tourist's decision to visit Ontario influences the amount of the tourist's spending in the province that can be attributed to the event. In effect, if the tourist would have come to Ontario whether or not the event took place, his or her tourism spending would not be attributable to *event tourism* but would still contribute to total tourism spending and tourism economic impact within the province.

Based on studies of visitors to various types of events, we know that at least some proportion of the 1.3 million *inbound* tourists made their trip to Ontario for reasons other than attending an event. Hence, we have provided three scenarios for estimating *event tourism* spending and economic impact in Ontario.

Scenarios	Event was the primary reason for X% of overnight inbound tourists' trips
High	50%
Medium	25%
Low	10%

Total visitor spending in Ontario for the 1.3 million inbound event tourists is estimated to be about \$808.5 million, or about 15% of the \$5,233.3 million in visitor spending by all inbound overnight tourists in Ontario over a year period.<sup>53</sup>

The tourism economic impact of the inbound event tourism market, assuming the best case scenario (high, 50%), would be approximately \$220 million in direct contribution to provincial GDP, about \$61.0 million in direct provincial taxes, and about 4,400 direct jobs.<sup>54</sup> At the other extreme, inbound event tourists could generate about \$44.0 million in direct GDP, \$12.2 million in direct provincial tax revenues and approximately 880 jobs [see Table B].

	Inbound Overnight Event Tourists	Tourism Spending in Ontario	GDP (Direct)	Provincial Taxes (Direct)	Jobs (Direct)
<b>Total</b>	1.3 million	\$808.5 million	\$439.8 million	\$121.9 million	8,800
<b>High (50%)</b>	650,000	\$404.3 million	\$219.9 million	\$61.0 million	4,400
<b>Medium (25%)</b>	330,000	\$202.1 million	\$110.0 million	\$30.5 million	2,200
<b>Low (10%)</b>	130,000	\$80.9 million	\$44.0 million	\$12.2 million	880

Inbound tourists bring *new* money into Ontario. Hence, their contribution to the provincial economy is more substantive than tourism by Ontario residents travelling within the province. Nonetheless, the resident tourist market is very substantial, both in terms of volume and support for tourism goods and services across the province. While not *new*, some of the money spent by residents can be seen as a form of import substitution – it is money that might have left the province had the Ontario resident elected to travel outside Ontario but is *retained* because the resident elects to stay in Ontario.

#### Ontario Residents: “Import Substitution”

In light of the wide array of community-based fairs, festivals and sporting events in Ontario, few Ontario resident event tourists would be expected to *replace* an event-driven trip to a destination outside the province with one taking place in Ontario. For this reason, import substitution is not expected to be particularly high. For purposes of generating an order-of-magnitude estimate of event tourism’s economic impact in the province, retention of spending by the resident event tourist market is estimated at no more than 10 percent [see Table C].

	Inbound Overnight Event Tourists	Tourism Spending in Ontario	GDP (Direct)	Provincial Taxes (Direct)	Jobs (Direct)
<b>Total</b>	3.8 million	\$863.60 million	\$466.1 million	\$133.5 million	8,850
Import Substitution (Assumed not to exceed 10%)	380,000	\$86.4 million	\$46.6 million	\$13.4 million	89

## A Comparison of Three Cities

To put Ontario's event tourism market in context with other major Canadian tourism destinations, the same calculations were performed for the provinces of Québec and British Columbia and the major city in each of the three provinces. As noted elsewhere in this review, the province of Québec adopts a comparatively aggressive event development, marketing and support program because of the strong link perceived to exist between cultural identity and various types of events.

The impact of an aggressive state-supported event program seems manifest in the proportion of *inbound overnight tourism* to Québec that is associated with events. While about 11% of inbound overnight tourism to the province is event-oriented in Ontario and British Columbia, the proportion increases to 16% in Québec [see Table D].

<b>Table D: Three Province/City Comparison</b>	<b>Overnight Person Visitors to Province/CMA</b>		<b>Tourism Spending in Province/CMA</b>	
Ontario Total Inbound Overnight	11,574,000		\$5,233,312,300	
Inbound Overnight Event	1,327,000	11%	\$808,541,300	15%
	1,327,000		\$808,541,300	
<b>Toronto CMA Inbound Event</b>	<b>537,000</b>	<b>40%</b>	<b>\$347,146,200</b>	<b>43%</b>
<b>QUÉBEC</b>				
Québec Total Inbound Overnight	5,503,000		\$2,738,145,200	
Inbound Overnight Event	876,800	16%	\$549,361,000	20%
	876,800		\$549,361,000	
<b>Montréal CMA Inbound Event</b>	<b>549,100</b>	<b>63%</b>	<b>\$323,374,300</b>	<b>59%</b>
<b>BRITISH COLUMBIA</b>				
British Columbia Total Inbound Overnight	6,086,300		\$3,461,056,900	
Inbound Overnight Event	677,800	11%	\$550,130,600	16%
	677,800		\$550,130,600	
<b>Vancouver CMA Inbound Event</b>	<b>233,900</b>	<b>35%</b>	<b>\$226,792,700</b>	<b>41%</b>

In each of the provinces reviewed here, a high proportion of inbound event-oriented tourism volume and spending is concentrated in the biggest cities.

For example, Toronto CMA represents two-fifths of Ontario's inbound event tourists (40%) and about the same proportion of tourism spending by inbound event tourists (43%).

Montréal, on the other hand, captures about three-fifths of Québec's inbound event tourism volume (63%) and spending (59%).

In fact, even though the overall size of Ontario's inbound event tourism market (1.3 million) far exceeds that of Québec (867,800), the two major cities in each province attract about the same number of event tourists and associated spending.

		<b>Inbound Event</b>	
		<b>Tourists</b>	<b>Spending</b>
1.	Toronto CMA	537,000	\$347,146,200
2.	Montréal CMA	549,100	\$323,374,300



**APPENDIX C:**  
**CELEBRATE ONTARIO & FESTIVALS AND EVENTS ONTARIO**  
**- 2008 INITIATIVES**

## APPENDIX C: Celebrate Ontario & Festivals and Events Ontario - 2008 Initiatives

The following is a list of those festivals and events that were funded through the Celebrate Ontario 2008 Initiative:

DATE	EVENT	LOCATION	GRANT
2008			
March 1 to Sept. 1	Science North WaterWorks Event	Sudbury	\$300,000
April 1 to Nov. 2	Shaw Festival	Niagara-on-the-Lake	\$103,588
April 21 to April 27	Telus Cup National Midget Hockey Championship	Arnprior	\$4,200
April 23 to Nov. 9	Stratford Shakespeare Festival	Stratford	\$297,000
April 28 to May 10	Santé Wine Festival	Toronto	\$75,000
May 1 to 3	Spring in Bloom Concerts	Niagara Falls	\$75,000
May 2 to 3	Talk is Free Theatre : Best of Ivanka	Barrie	\$18,000
May 2 to 19	Canadian Tulip Festival	Ottawa	\$300,000
May 23 to 25	Ottawa Race Weekend	Ottawa	\$39,706
May 23 to 25	Carassauga Festival Inc.	Mississauga	\$70,760
May 29 to July 4	Annual Portugal Week 2008 Celebrations	Toronto	\$73,688
May 29 to June 1	Laugh Out Loud (LOL) Sudbury Comedy Festival	Sudbury	\$37,059
June 1 - Aug. 21	Brott Music Festival	Hamilton	\$44,475
June 5 to 8	Orangeville Blues and Jazz Festival	Orangeville	\$41,647
June 6 to 15	LuminaTO	Toronto	\$300,000
June 7 to 8	Re-enactment of the Battle of Stoney Creek	Stoney Creek	\$15,529
June 11 to Oct. 13	Sur les traces de Champlain	Various Communities in Northern and Southern Ontario	\$126,176
June 12 to 15	Burlington's Sound of Music Festival	Burlington	\$75,000
June 13 to 15	Medieval Festival at Upper Canada Village Heritage Park	Morrisburg	\$75,000
June 17 to July 1	Windsor Summer Fest	Windsor	\$61,676
June 18 to Aug. 17	St. Lawrence Parks Commission - A Seaway Story	Morrisburg	\$70,125
June 20 to 22	Summer Solstice Aboriginal Arts Festival	Ottawa	\$60,353
June 20 to 29	Pride Toronto/Pride Week 2008	Toronto	\$291,838
June 29	Pride Parade		
June 20 to 29	Toronto Downtown Jazz Festival	Toronto	\$187,500
July 20 to July 1	TD Canada Trust Ottawa International Jazz Festival	Ottawa/Gatineau	\$300,000
June 21 to Aug. 23	Peterborough Summer Festival of Lights	Peterborough	\$55,952

June 27 to 29	Muskoka SummerFest	Bracebridge	\$75,000
June 27 to 28	IlluminAqua	Welland	\$75,000
July 24 to 26			
August 22 to 23			
July 1 to Sept. 1	Harbourfront Centre's Summer Festival	Toronto	\$84,600
July 3 to Aug. 15	Huntsville Festival of the Arts	Huntsville	\$21,618
July 3 to 13	Cisco Ottawa Bluesfest	Ottawa	\$285,000
July 3 to 6	Sunfest - A Celebration of World Cultures	London	\$75,000
July 4 to 6	Thunder Bay Blues Festival	Thunder Bay	\$32,449
July 5 to Aug. 17	Festival L'écho d'un peuple de Prescott et Russell	Casselman	\$225,000
July 10 to August 3	Theatre by the Bay - A Midsummer Night's Dream	Barrie	\$37,500
July 11 to Aug. 3	Elora Festival	Elora	\$61,238
July 12 to 13	Art of Being Green Festival	Lanark	\$38,475
July 15	Caribana Festival Launch	Toronto and surrounding	\$300,000
July 25	Gala		
Aug. 2	Parade		
July 16 to Aug. 2	World Heritage Music Festival - Fort Henry National Historic Site of Canada	Kingston	\$55,000
July 18 to 27	Beaches International Jazz Festival	Toronto	\$75,000
July 18 to Oct. 13	Earth Art Exhibition	Burlington	\$75,000
July 21 to Aug. 17	Stratford Summer Music	Stratford	\$74,118
July 22 to 24	Major League Soccer All Star Game and 3 day Soccer Experience	Toronto	\$300,000
July 22 to 26	2008 World Percheron Congress	Toronto	\$69,966
July 24 to 27	Annual Collingwood Elvis Festival	Collingwood	\$75,000
July 24 to 26	Just for Laughs Toronto Festival	Toronto	\$286,512
July 25 to 27	Hillside Festival	Guelph	\$37,500
July 31 to October 12	The Chinese Lantern Festival	Toronto	\$295,588
August 1 to 3	Electric Eclectics	Meaford	\$7,765
August 1 to 4	Rideau Canal Festival - Festival du Canal Rideau	Ottawa	\$277,500
August 8 to 10	Krinos Taste of the Danforth	Toronto	\$75,000
August 8 to 10	Kitchener Blues Festival	Kitchener	\$56,250
August 13 to 17	Festival de la CURD Festival	St-Albert	\$75,000
August 14 to 17	Ottawa Folk Festival	Ottawa	\$75,000
August 14 to 24	SuperEX	Ottawa	\$296,471

August 15 to 17	Markham Jazz Festival	Markham	\$46,589
August 15 to 17	Anishnawbe Keeshigun Festival	Thunder Bay	\$75,000
August 15 to Sept. 1	Canadian National Exhibition	Toronto	\$300,000
August 21 to 24	ScotiaBank Buskerfest - Toronto International Street Performers Festival	Toronto	\$52,500
August 21 to 24	Sudbury Summerfest	Sudbury	\$38,880
August 21 to 24	Tecumseh Corn Festival	Town of Tecumseh	\$67,500
August 28 to Sept. 1	The Nipigon Fall Fishing Festival	Nipigon	\$71,250
August 29 to Sept. 7	Kingston Bike Festival	Kingston	\$300,000
Sept. 1 to Nov. 30	Celebration of Trails	Communities throughout East and Central Ontario	\$22,511
September 3 to 7	Guelph Jazz Festival	Guelph	\$52,500
September 4 to 13	Toronto International Film Festival	Toronto	\$285,949
September 4 to 7	Shores of Erie International Wine Festival	Amherstburg	\$75,000
September 5 to 7	Once Upon a Thames St. Mary's Storytelling Festival	St. Mary's	\$11,912
September 11 to 13	Le Festival national de l'Humour	Hearst	\$74,228
September 12 to 14	CanoeKayak Knockout	Toronto	\$61,765
September 16 to 20	International Plowing Match 2008	Teeswater	\$37,800
September 17 to 21	Lindsay Central Exhibition	Lindsay	\$75,000
September 18 to 20	Canada DanceSport	Kingston	\$57,525
September 19 to 21	All-Canadian Jazz Festival Port Hope	Port Hope	\$5,594
Sept. 19 to 28, 2008 Jan. 16 to 25, 2009	Niagara Grape and Wine Festival	Niagara and surrounding	\$300,000
TBC			
September 27	Head of the Welland - Five Bridges Fall Classic	Welland	\$63,375
September 28	The Word On The Street: Toronto Book and Magazine Festival	Toronto	\$75,000
October 18 to 19	Binational Doors Open Niagara	Niagara and surrounding	\$61,324
Sept. - Nov.	Niagara by Design 2008		
October 3 to 5	Niagara Food Festival	Welland	\$71,771
October 4 to 5	Port Elgin Pumpkinfest	Port Elgin	\$63,750
October 17, 18, 24, 25, 31	Fort Fright - Fort Henry National Historic Site of Canada	Kingston	\$260,000
October 7 to 13	Norfolk County Fair & Horse Show	Simcoe	\$54,000
October 10 to 18	Kitchener-Waterloo Oktoberfest	Kitchener-Waterloo	\$261,706
October 15 to 19	imagineNATIVE Film and Media Arts Festival	Toronto	\$31,613
October 17 to 19	Migration Festival	Kingsville	\$15,051

October 22 to 26	9th Annual Planet in Focus: International Environmental Film & Video Festival	Toronto	\$63,529
Nov. 13 to Jan. 4	Town of Ingersoll Festival of Lights & Santa's Festival Village	Ingersoll	\$27,265
Nov. 14 to Jan. 4	Festival of Northern Lights	Owen Sound	\$60,750
2009			
February 6 to 22	Winterlude 2009	Ottawa	\$300,000
March 26 to 29	CIS Men's National Ice Hockey Championship	Thunder Bay	\$74,118

The following is a list of 20 Celebrations with budgets at \$1 Million or more that attract upwards of 100,000 attendees, according to Festivals & Events Ontario (FEO):

NAME	TYPE	START DATE	END DATE	ATTENDANCE	REVENUE	CITY
1. Canada Blooms 2009	Garden Tours	03/18/09	03/22/09	100,001 - 500,000	\$1,000,000+	Toronto
2. Canadian National Exhibition	Exhibitions and Shows	08/15/08	09/01/08	1,000,000 +	\$1,000,000+	Toronto
3. Canadian Tulip Festival	Festivals	05/02/08	05/19/08	1,000,000 +	\$1,000,000+	Ottawa/Gatineau
4. Caribana Festival & Parade	Festivals	07/02/08	08/02/08	1,000,000 +	\$1,000,000+	Toronto
5. World Heritage Site Sunset Ceremonies Snowbird Salute	Heritage	06/18/08	06/18/08	100,001 - 500,000	\$1,000,000+	Kingston
6. Grand Prix of Toronto	Sports	07/04/08	07/06/08	100,001 - 500,000	\$1,000,000+	Toronto
7. "Come Home To The Country" - 2008 International Plowing Match	Exhibitions and Shows	09/16/08	09/20/08	50,001 - 100,000	\$1,000,000+	Teeswater
8. Kitchener-Waterloo Oktoberfest	Festivals	10/10/08	10/18/08	500,001 - 1,000,000	\$1,000,000+	Kitchener
9. Luminato	Festivals	06/06/08	06/15/08	1,000,000 +	\$1,000,000+	Toronto
10. Winterlude 2009	Festivals	02/06/09	02/22/09	500,001 - 1,000,000	\$750,001 - \$999,999	Ottawa
11. Niagara Grape and Wine Festival	Festivals	09/19/08	09/28/08	100,001 - 500,000	\$1,000,000+	St. Catharines
12. Rogers Chinese Lantern Festival	Festivals	07/31/08	10/12/08	100,001 - 500,000	\$1,000,000+	Toronto
13. Toronto Pride Week 2008	Festivals	06/20/08	06/29/08	1,000,000 +	\$1,000,000+	Toronto
14. Royal Agricultural Winter Fair	Agricultural Fairs	11/07/08	11/16/08	100,001 - 500,000	\$1,000,000+	Toronto
15. Shaw Festival	Theatre	04/01/08	11/02/08	100,001 - 500,000	\$1,000,000+	Niagara-on-the-Lake
16. Stratford Shakespeare Festival	Performing Arts	04/23/08	11/09/08	500,001 - 1,000,000	\$1,000,000+	Stratford
17. Rogers Cup 2008	Sports	07/19/08	07/27/08	100,001 - 500,000	\$1,000,000+	Toronto
18. TD Canada Trust Toronto Jazz Festival	Music	06/20/08	06/29/08	500,001 - 1,000,000	\$1,000,000+	Toronto
19. Toronto International Film Festival	Festivals	09/04/08	09/13/08	1,000,000 +	\$1,000,000+	Toronto
20. Winter Festival of Lights 2008/2009	Festivals	11/08/08	01/05/09	1,000,000 +	\$1,000,000+	Niagara Falls

**APPENDIX D:  
COMPARATIVE STRATEGIC PRACTICES IN NATIONAL &  
INTERNATIONAL JURISDICTIONS**

## APPENDIX E: COMPARATIVE STRATEGIC PRACTICES IN NATIONAL & INTERNATIONAL JURISDICTIONS

### SCOTLAND

#### ***Major Events Strategy 2003-2015: “Competing on an International Stage”***

**Vision:** *To become one of the world's foremost events destinations by 2015.*

**Mission:** *To deliver a viable portfolio of major events to attract visitors to Scotland, to enhance Scotland's international profile, to strengthen our sporting and cultural infrastructure and to maximize the economic, social and environmental benefits of events to all parts of the country.*

#### **Background & Overview of the Strategy**

The Scottish Government first announced the decision to develop its *Major Events Strategy 2003-2015* in 2001. The choice to develop this Strategy was based in part on work that was done to secure the *Ryder Cup* for Scotland in 2014, as well as the bid to host the *Euro 2008*. Several key public sector bodies gathered in 2001 to form a steering committee that would help to develop this *Strategy*, including: sportscotland, VisitScotland, the Scottish Arts Council, Scottish and Highlands and Islands Enterprise, CoSLA and the Cities of Edinburgh and Glasgow. Objective Performance Limited (OPL), a leading sponsorship and events company that helped Sydney to secure the *Olympic Games* in 2000, was hired to research the major events market and determine the best opportunities for Scotland's future. In 2002, OPL interviewed over 80 local and international organizations involved in major events, and their findings became the basis of the *Major Events Strategy*. The entire strategy development process involved 18 months of research and analysis.

Prior to the Strategy development, Scotland was already renowned for hosting “uniquely Scottish” cultural and sporting events such as the *Edinburgh Festival* and the *Open Golf Championships* (hosted every two years). Scotland's unique assets include: world-class golf courses, wild and dramatic scenery, major football and rugby grounds, and modern conference facilities. Furthermore, the staging of major sports events in Scotland was seen as inspiring and supportive of the ambition of the country's own residents. Both public and private sectors have been involved in delivering successful events, but there was a general agreement by everyone involved that in order to fulfill Scotland's potential and compete on an international level, a coordinated and strategic approach was required for hosting major events.

Also, tourism has been long established as one of Scotland's biggest industries, worth more than £4.2 Billion a year as of 2007.<sup>55</sup> The majority of this spending is generated by visitation to the major cities of Edinburgh and Glasgow. Edinburgh's tourism generates £1.1 Billion a year alone, with one-tenth of the city's workforce (31,000 people) employed in the industry.<sup>56</sup> Edinburgh is more of a cultural centre than Glasgow - being home to Edinburgh Castle, the National Gallery of Scotland, Royal Scottish Academy Building, Edinburgh International Conference Centre, and a wide variety of museums, galleries and historic public buildings. It is best known for hosting the *Edinburgh Festival*, which is described later on in this section. By 2015, Edinburgh is expected to require an additional 4,000 hotel rooms to support the major events that are currently on the calendar.

Given its perception as a highly industrial city, Glasgow has had a much tougher time at growing its tourism base, but has successfully repositioned itself within very different products from the Capital city. Glasgow is home to a variety of theatres including: The King's Theatre, Theatre Royal and the Citizens' Theatre, as well as many municipal museums and art galleries. The city has hosted many exhibitions over the years, including being the UK City of Architecture 1999, European Capital of Culture 1990, National City of Sport 1995–1999 and European Capital of Sport 2003. It is also home to Hampden Park, which is Scotland's national football stadium, and in 2003, National Geographic Traveller named Glasgow,

Scotland's coolest" city. Edinburgh is approximately 259km<sup>2</sup> with a population of 1.25 million, while Glasgow is about 175 km<sup>2</sup> with a population of 1.75 million - both of which are on par size-wise with the City of Toronto (2.48 million). The two cities are very different at the core, yet equally important to Scotland's tourism industry.

The Scottish Government is targeting a 50% increase in visitor spending within the country by 2015, and attracting major events has been identified as one of the methods for achieving this goal. Given the influence of the two major cities in Scotland, and with the needs of the rural economies in mind, the Government identified that different locations will be required to host different events (i.e., more sporting events in Glasgow and more cultural events in Edinburgh). The key to this strategy's success has been to keep in mind that the whole is a sum of the individual parts and that each part is essential to the tourism product that is Scotland.

The following is a list of the key areas that were identified through the interview process as necessary to address in order for Scotland to achieve its goals in relation to implementing a *Major Events Strategy*<sup>57</sup>:

- Improved coordination between event organizers and funders in Scotland;
- Better links between major events and other strategic priorities, such as tourism and business marketing;
- Better use of existing and new infrastructure throughout Scotland;
- Better knowledge about international events, and agreed mechanisms for appraising and evaluating the impacts of events;
- Build expertise to reduce risk of unsuccessful event bids;
- Build best practice partnerships between public and private sectors to maximize the benefits of hosting events in Scotland; and,
- Better return on investment and economies of scale from developing a portfolio of events.

Four key areas of action were identified based on these goals:

- Building Scotland's international image by maximizing benefits of existing successes and icon events;
- Developing a portfolio of sporting and cultural events;
- Coordinating existing public/private sector activities and exploring opportunities to enhance current events; and
- Building a centre of knowledge and expertise to secure Scotland's reputation as a premier events destination by 2015.

### **Management and Sustainability**

As part of the implementation process for the *Major Events Strategy*, a new body – *EventScotland* – was established to give central coordination and secure major events, work closely with other private and public sector organizations that would be involved in these events, and remain arms length from Government. *EventScotland* now has the following functions:

- Sharing information on events with other public agencies;
- Assessing, evaluating and determining which events should be supported;
- Organizing conditions for public funding;
- Securing new events;
- Developing and improving existing events;
- Developing a portfolio of events for 2003-2015 and a centre of knowledge for the details on these events;
- Promoting and communicating Scotland's role in event hosting; and,
- Remaining accountable to Government.

Essentially, *EventScotland* was developed to implement the *Major Events Strategy*, and was provided with a budget of £10 Million, or \$20.5 Million CAD, spread over the period of three years (2003-2006).<sup>58</sup>



The organization has since brought in sponsorship from private sector companies and other public sector agencies to co-fund events.

### **Identification of Major Events**

The following is a list of the types of major events that are considered on the priority list for EventScotland:

- Events that highlight and capitalize on the unique visual appeal and landscape of Scotland;
- Events that showcase Scottish culture and sport;
- Events that Scotland can “own”, nurture, develop and (on occasion) export;
- Events which require little or no infrastructure additions, or which tie to planned infrastructure development;
- Events that underpin the priorities of the Scottish Executive and other public sector agencies involved in major event organization;
- Events that have an intrinsic appeal to Scots;
- Events that highlight and promote the unique appeal and proposition of individual locations (city, town or rural);
- Events that focus on quiet times of the year;
- Events that offer a direct economic return on investment through tourism, promotion of Scottish business or other means;
- Events that stimulate a sense of pride in the local population;
- Events which are sustainable and which are accessible to a wide range of communities and groups;
- Events that can secure favourable broadcast and print media coverage in key tourism/investment markets;
- Events of an international, prestige and leading status;
- Events capable of generating new and/or complementary initiatives within the same sector at national, regional and grassroots levels;
- Events that offer commercial and showcase opportunities for Scottish businesses; and,
- Events that are available, achievable and affordable.

As demonstrated, EventScotland has incorporated practices that target festivals and events during off-peak seasons into its overall mandate.

### **Policies, Programs, and Funding to Support Major Events**

As it exists today, EventScotland's vision is “to sustain Scotland's international profile as one of the world's foremost events destinations up to and beyond 2015, increasing visitor numbers to Scotland and maximizing all tourism related business for the continued development of the Scottish economy.” ([www.eventscotland.org](http://www.eventscotland.org)). Their *International Events Programme* has been developed to support and attract those events that will generate significant international media coverage and/or create significant

economic impact for Scotland. Through this program, EventScotland works with new or existing events by providing financial assistance on a short-term basis, and works through partnerships with local and/or national government agencies in tourism, sport, culture and economic development. Funding is provided by the Scottish Executive, and does not include funding for conferences, exhibitions or trade shows.

According to the website, the key objectives of the *International Events Programme* are to create a portfolio of events that will: generate substantial economic benefits to Scotland through increased visitation (tourists/spectators/participants); highlight Scotland as an events and tourism destination through high-profile, international television/media coverage; and, enhance Scotland's opportunities to host further major events.

### **Regional and City-Driven Strategies for Festivals and Events**

EventScotland also hosts a *Regional Events Programme* that complements the organization's core activity, and plays an integral role in developing domestic tourism across Scotland by supporting events that take place outside the cities of Edinburgh and Glasgow. The *Programme* primarily assists development and growth of sporting and cultural events. EventScotland produced an Events Management Guide for event managers that includes tips for planning and support materials, and is offered digitally on their website. This type of resource is essential for helping to integrate the *Major Events Strategy* into daily use. An annual budget of £500,000 is administered to support regional events.

The primary objective of the *Regional Programme* is to develop a portfolio of events that will:

- Generate economic benefit for specific regions of Scotland;
- Attract visitors to a region from other parts of the country;
- Enhance the profile and appeal of the host region; and
- Inspire and involve local communities.

In response to the publication of the Scottish Executive's *Major Event Strategy* in 2002, the Scottish Borders Council, Scottish Enterprise Borders, VisitScotland Borders and Forestry Commission Scotland developed the *New Ways Scottish Borders Event Strategy*. The aim of this strategy was to capitalize on the strong partnerships involved in event development for the border regions, and to maintain synergies with the rest of the country.

Furthermore, the City of Edinburgh has developed its own *Festivals Strategy* in 2001 to maximize the potential of the festival industry and to promote Edinburgh as a world-class festival city. One way in which the city learned to capitalize on this image is to promote itself as an "out of season" destination, with key festivals and events outside the larger summer festivals.<sup>59</sup> This strategy was developed in tandem with an *Events Strategy* for the City, which was launched in 2002. This strategy was developed based on Edinburgh's reputation for major high profile events, underpinned by its historic and attractive city centre, and status as Scotland's capital city and as the gateway to the rest of the country. Throughout the strategic planning process at the municipal level, the City not only identified expected economic outcomes, but also social and cultural impacts, as a City within Scotland - recognizing that at a national level, Scotland has been aspiring to become "one of the world's finest events destinations by 2015".<sup>60</sup>

### **Performance Measurement**

EventScotland has a standardized model for measuring the economic impact of events, and is currently working towards developing uniform measures for cultural and social impacts. Before events are even considered, however, event organizers are asked to consider the following questions with respect to the event: Will this event bring a significant number of spectators/participants to Scotland? Will this event provide significant international media coverage of Scotland? Will this event provide an economic return on investment through additional visitor spending? Will this event leave a sustainable legacy for Scotland?

By encouraging event planners to complete this questionnaire prior to submitting an application for funding from the *International Events Programme*, EventScotland can narrow down the events that apply.

### **Implementation and Impacts of the Major Events Strategy**

Since its inception in 2003 through to 2007, EventScotland supported 114 international sporting events and 48 international cultural events – and invested the same amount in sport and culture. The organization also supported 109 events through the *Regional Programme*. The total estimated economic value of their events portfolio was £315 Million as of 2007, with partner agencies contributing £35 Million.

One of the most essential elements of Scotland's success in the event industry has been the leadership provided for identifying and securing major events. David Williams was recruited from Australia to ensure proper implementation of the *Major Events Strategy*, and remained with the organization for four years. Through his management of the EventScotland team, Scotland launched *Highland 2007* – a celebration of unique highland culture – and hosted the *2003 MTV Europe Music Awards* in Edinburgh, which generated £8.9 Million in direct economic benefits and doubled the City's original estimates.

During Scotland's *National Events Conference* in 2007, Williams identified a number of clearly defined steps to lead EventScotland towards success:

- Create an inventory of existing infrastructure for hosting world-class events;
- Understand what existing world-class events are already being hosted in Scotland, and whether they needed support;
- Determine what events have already been secured and what new events could be hosted in Scotland;
- Develop partnerships with other agencies: VisitScotland, sportscotland, the Arts Council, the Enterprise companies – and create a portfolio of events;
- Create an *International Events Programme* to attract people and media from outside Scotland, and a *Regional Events Programme* to attract primarily Scottish audiences.

EventScotland's primary objective was to fulfill the *International Events Programme* by securing a few key mega events in the sector of Sport, such as the *Ryder Cup*, the *Commonwealth Games* and the *Rugby World Cup*. As David Williams confirmed, "you need to be at that level to be one of the foremost destinations."<sup>61</sup> During Scotland's National Events Conference in 2007, Williams indicated that success is also based on developing a diverse portfolio of other world-class events in addition to the mega events: "Looking at it as a pyramid, you have the mega events, then world championships, strategic priority events, specifically made for television events around adventure sports, and a strong base of regional events."<sup>62</sup>

### **Role of Partnerships to Support Event Strategies**

As costs for bidding and developing events increases, there is an ever-growing need to obtain high quality information about events that are available and the nature of global competitors. EventScotland has acknowledged that it is necessary to continually compete and maintain awareness of all potential opportunities in the global market. For example, in 2004, Scotland was keen to bid on the *2015 Rugby World Cup (RWC)*. Although formal bidding did not occur until 2007, the Scottish Rugby Union and EventScotland formed a partnership to ensure that the *Under-21 RWC Championship* went smoothly. About 46,000 fans watched the events, and the International Rugby Board was particularly impressed by the partnership approach that was evident in Scotland.<sup>63</sup>

Also, in 2007 EventScotland moved from being a joint venture between the Scottish Executive and VisitScotland to become a Directorate of VisitScotland, with an increased emphasis on cross-departmental working.

During the *National Events Conference* in June 2007, discussions were raised about the choice in events to sponsor. Williams indicated that the greatest attribute an organization (like EventScotland) can have is “the capacity to assess risk; make a mistake when you are investing public money and you’ll read about it on the front pages and the government will be embarrassed.”<sup>64</sup> As an example of how public the bidding process can be, in Spring 2007 the president of the Scottish Football Association was accused of making racist comments, which cost him his chance to become VP of the game’s governing body.<sup>65</sup> Fortunately, his comments did not prevent Glasgow from beating out Abuja, Nigeria, to win *the 2014 Commonwealth Games* in November 2007. Nevertheless, this situation proves that not only the bidding agency (i.e., EventScotland), but also all stakeholders in a given jurisdiction need to see the wider picture when bidding for major international events. As the current COO of EventScotland confirmed, “places like the Middle East have bucketfuls of money and could, arguably, go and buy events,” so it is necessary to have a strategy in place and “take calculated risks” to win the big events.<sup>66</sup> In the case of *Glasgow’s 2014 Commonwealth Games* bid, the country invested £1 Million.

As for the near future, Scotland plans to maximize its opportunities while London is hosting the *2012 Summer Olympics*, i.e., by hosting Olympic training camps and pre-Olympic events, or an Olympic conference on physical education and sport. Due to the fact that the cost of bidding on world-class events is so high, with international federations asking for unrealistic sanction fees – Scotland plans to look more closely at the value and legacy of the events that are chosen, over and above purely economic terms. For instance, more consideration is being given to the type of infrastructure required for more diverse world-class events. New facilities are coming on-stream in Glasgow, such as the National Indoor Arena, velodrome and the entertainment venues at the Scottish Exhibition and Conference Centre (SECC). These facilities are expected to bring events such as the World or European indoor athletics championships, major cycling events, and World or European Championships in figure skating and gymnastics.

### **Case Study: Edinburgh Festival**

The *Edinburgh Festival* was developed in 1947 by the Edinburgh International Festival (EIF) and is now considered the largest art festival in the world. One of the original aims of the EIF was to “provide a platform for the flowering of the human spirit” and the *Festival* still revolves around classical music, opera, theatre and dance.<sup>67</sup> It has since become a major calendar event for the City, and has developed a variety of programs over the years to attract tourists and demonstrate a multicultural image.<sup>68</sup> For six weeks over the summer, the Festival now includes: the *Edinburgh International Festival*, *Fringe Festival*, *Edinburgh Military Tattoo*, *Hogmanay celebrations*, *International Science Festival*, *International Book Festival*, *Jazz Festival* and *Film Festival*.

The founders’ original intentions are closely reflected in the current objectives of the *Festival*, such that there is a very high standard of artistry involved and the best international artists are sought after to celebrate arts and culture. The festival was recognized as a tourist attraction when a Gothic building near the Edinburgh Castle called “The Hub”, formerly known as “The Highland Tooth,” became the focal point of the celebrations.<sup>69</sup> It now contains the ticketing centre and cafe, with events hosted in the Main Hall.

Despite the commercialization of certain elements of the *Edinburgh Festival*, the fact that the original objectives are still in play shows how successful the EIF has been in reinventing the *Festival* to retain and improve its position. It has been estimated that tourism provides over £1.1 Billion per year, supporting 27,000 jobs, and that this festival contributes £120 Million annually.<sup>70</sup> Official EIF Audience Research from 2002 indicated that 43% of attendees were local, 18% national, 21% from other parts of the UK, and 17% from overseas, with visitors staying an average of eight nights in Edinburgh.

### **Best Practices in Commemorative Events**

*Homecoming Scotland 2009* has been established to celebrate the 250th anniversary of Robert Burns' birth, as well as Scotland's contributions to the world: golf, whisky, great minds and innovations, culture, and heritage. It is a Scottish Government initiative managed by EventScotland in partnership with VisitScotland. The themes for Homecoming were chosen because they are "uniquely Scottish" and are widely recognized across the world as being icons of Scotland.

Events have been planned from January through to November 2009, and are aimed at both visitors to and residents of Scotland. A website – [www.homecomingscotland2009.com](http://www.homecomingscotland2009.com) - has been developed to share information on the events well in advance of the start-up. In order to encourage visitors to attend events during the winter months, the website emphasizes that winter fairs and festivals will take place in towns and cities all over the country, i.e., the four-day Hogmanay party in Edinburgh over New Year's.

In 2007, EventScotland proposed a potential new event, *The Gathering 2009*, to the VisitScotland. The major element of this two-day event would be a traditional Highland Games (held in Holyrood Park), and a Clan Parade and commemorative event that would take place on the Royal Mile and Castle Esplanade. Around 7,500 clan members were projected to attend, mainly from North America. It was determined that the event had the potential to be one of the key events of the homecoming year. Since then the business plan has been written and the two days were set aside for late July. One of the confirmed performing groups is the *Canadian Massed Pipes and Drums*, with four drum majors, 81 Pipers and 48 Drummers from Alberta, British Columbia, Manitoba, New Brunswick, Nova Scotia and Ontario.

Another way that EventScotland has attempted to draw international interest is through the dedicated website - [www.thegathering2009.com](http://www.thegathering2009.com) - wherein people have the opportunity to discover their own clan affiliations, or participate in blogs.

## **IRELAND**

### ***National Development Plan (NDP) 2007-2013 - Festival & Events Cultural Initiative & International Sports Tourism Initiative***

#### **Background & Overview of the Strategy**

Within the past five years, the Irish Government and industry stakeholders have taken very clear directions to improve the Irish tourism industry, providing a total investment of about €3 Billion.<sup>71</sup> Strategies for tourism development have been carefully developed through private-public partnerships, such as the Tourism Product Development Review Group, in conjunction with *the National Development Plan for Ireland*. As competition in Europe continues to grow, and private-public partnerships in other countries are investing in iconic events, Ireland has determined that one way to compete was to host major events, and has started investing accordingly.

As of 2007, the Government of Ireland and its social partners have begun to take a longer-term approach to their relationship and to their approach to consensus-based policy evolution, which has included a ten-year *Framework Social Partnership Agreement — Towards 2016*, with the ultimate goal of achieving a better quality of life for everyone in Ireland. As part of this agreement, many aspects of social and economic growth were identified as requiring change. The Irish Government produced the €184 Billion *National Development Plan (NDP) 2007-2013: “Transforming Ireland – A Better Quality of Life for All”*, which laid specific actions to address these issues and set out how to build a “prosperous Ireland for all the people, characterized by sustainable economic growth, greater social inclusion and balanced regional development.”<sup>72</sup>

The total N.D.P. budget included investment in tourism of €800 Million over the next seven years, including a *Product Development and Infrastructure Sub-Programme* of €317 Million to upgrade and supplement Ireland’s tourism attractions and activities.<sup>73</sup> This *Sub-Programme* called for between four to six large-scale national projects that are capable of delivering new tourism business from overseas, including development of the National Conference Centre, the new National Theatre and the new National Concert Hall in the "Gateway" City of Dublin.

This mandate emphasizes the fact that the national government has recognized the City of Dublin as a key generator of tourism revenues - through the sport, culture and business sectors. There are about 1.7 million people in the Greater Dublin Area - making it both the Capital and the largest city in Ireland. In 2008, Dublin was listed as the fifth-richest city in the world, on the basis of purchasing power.<sup>74</sup> The City is host to the 4th largest stadium in Europe, Croke Park, as well as the National Museum of Ireland and a wide variety of galleries and theatres in association with the City's literary history. A Conference Centre was considered a natural addition to Dublin as the economic, sporting and cultural centre for Ireland.

#### **Management, Sustainability & Funding of Major Events**

Fáilte Ireland, the National Tourism Development Authority, was established under the National Tourism Development Authority Act (2003) “to guide and promote tourism as a leading indigenous component of the Irish economy.”<sup>75</sup> In order to develop this *Sub-Programme*, Fáilte Ireland worked with the Tourism Product Development Review Group to research tourism product development and provide guidance for public and private sector investment. The report was completed in 2006, and became the basis for the new *Tourism Product Development Strategy*.

This Strategy calls for a more rigorous support for private sector investment, and is market-driven, so as to capture the maximum economic benefit. It identifies that tourism investment should be targeted on “tourism infrastructure, major new events and other innovative products that will attract additional visitors.”<sup>76</sup> Festivals and events are identified in the *Tourism Product Development Strategy* as being “an effective way of attracting significant numbers of people to a region – often in the low tourist season,” as “they help to address regional and seasonal issues.”<sup>77</sup>

In conjunction with the N.D.P., the Department of Arts, Sport and Tourism developed a specific fund that has been dedicated to encouraging development of a small number of major annual events, with a focus on new events that drive international visitors and revenue near supporting infrastructure (i.e., accommodation). This fund was put under Fáilte Ireland's jurisdiction, to provide support for the creation of two to three major new festivals and cultural events over the period to 2013, at an annual average of €4 Million, for a total investment of €28 Million. More specifically, the fund was expected to go towards working capital and marketing of national culture, musical and literary festivals to enhance the Irish tourism product. Major tourism sporting events are considered separately from this fund.

### **Implementation of the Tourism Product Development Strategy**

With the allocations of funding in the N.D.P., a key priority for Fáilte Ireland has been the implementation of the overall *Tourism Product Development Strategy* and prioritization of funding. An Implementation Team was put in place to manage and oversee effective spending. During 2007, a major emphasis was placed on supporting local authorities and other key infrastructure providers to develop a set of facilities for tourists. In 2008, the focus has moved to a reinvestment in Visitor Attractions and the expansion of various commercial Visitor Activities.

In support of the *Tourism Product Development Strategy*, Fáilte Ireland developed the *Festivals and Cultural Events Initiative*, which identifies as its primary objective: "encouragement of the spatial spread of visitors throughout the country by strategically investing in attractive and sustainable festivals and cultural events which enhance the local tourism product and in turn expand regional tourism."<sup>78</sup> Festivals and cultural events are seen as important cultural tourism products that give tourists additional reasons to visit a place, "often because events are one-off and take place in a limited timeframe, and because festivals offer a concentrated and unique experience."<sup>79</sup>

The *Festival & Cultural Events Fund* in 2008 is offered at three levels. Level One applies to existing festivals and cultural events that are professionally run, attract visitors from overseas in addition to a national audience, and take place in 2009, while the Level Two and Local Marketing & Development programmes help smaller and regional events. The Level One events must be able to demonstrate their national importance to tourism in order to qualify for funding of over €60,000 (\$120,755 CAD). Support has been allocated to national and international marketing, feasibility studies, and audience research to assist with development of the event. Furthermore, priority is shown to events that can generate overnight visitor traffic in locations and at periods where tourism capacity is under-utilized.

### **Policies and Programs to Support Major Sporting Events**

Recognizing the potential of sports tourism to Ireland, over and above the arts & cultural initiatives, the Department of Tourism, Sport and Recreation introduced the *International Sports Tourism Initiative 2000-2007*. Its aim was to help build Ireland's international reputation as a sports destination of choice, and consequently to increase sports tourism. The Government allocated a fund of €55.24 Million over the period from 2000 to 2007 "for the development of public private partnership in terms of securing, through Fáilte Ireland and commercial sponsorship, some of the most prestigious and exciting international sporting events in the world for Ireland."<sup>80</sup>

Given Ireland's previous success with the *Rugby World Cup* and having been awarded the *Special Olympics World Games* in 2003, the Government has increased the annual allocation to the international sports tourism fund from €3.17 Million initially to a major €7.62 Million per annum, and extended the initiative until 2007. One of the major areas identified for targeting new events was that of golf. Ireland attracts 219,000 golf-related visitors every year, who contribute about €144 Million per annum to the national economy.

In association with other national tourism agencies, Fáilte Ireland was put in charge of implementing the *International Sports Tourism Initiative*, concentrating on attracting those events that can showcase Ireland's natural landscape through the international media. For example, outdoor events that take place against a backdrop of "stunning scenery" or those events with capacity to attract large numbers of

overseas visitors who will bring great economic benefit to the area in which the event is taking place. The main focus of the initiative is the promotion of "Ireland - a natural sports arena," targeting sports such as: sailing, cycling, car rallying, golf and equestrian. Through the *Sports Tourism Initiative* in 2007, Fáilte Ireland supported the *Irish Open Golf tournament* in Limerick in May, and the *Smurfit European Golf Open* in County Kildare in July.

An International Sports Tourism Advisory Group, made up of representatives from both sports and tourism interests, evaluates applications and makes recommendations to the Board of Fáilte Ireland for final approval. Fáilte Ireland also liaises with Ireland's business community to source partnership sponsorship for these events. The criteria for support under the Initiative include:

- **Regionality:** The aim is to attempt to spread the benefits of tourism, as much as possible, across the Regions;
- **Seasonality:** The emphasis is to increase tourism traffic outside the peak summer events;
- **Yield:** This is the revenue-generating potential of the event which is evaluated according to the average number of nights spent in Ireland, the demographic profile of the tourist and the projected number of tourists expected to visit specifically for the event in question;
- **Television Exposure:** The evaluation includes exposure achievable in Fáilte Ireland's priority markets;
- **Other Media:** The evaluation includes the ability to generate publicity and promotion for Ireland in all other media;
- **Prestige:** This is based on whether the event is of World, International or European class, as well as the event's ability to lend prestige to the image of Ireland as a host nation;
- **Carry Through:** This is the ability of the event to attract repeat visits by becoming a permanent fixture in Ireland and/or spectators returning to Ireland to participate in their sporting activity;
- **Future Events:** This is where the hosting of an event provides a platform to attract other higher-profile events in the same sporting code.

### **Performance Measurement & Impacts of Major Events**

Fáilte Ireland makes an assessment of the Tourism Yield Impact of all festivals and events following their completion. The assessment is based on related infrastructure and accommodations (i.e., room nights). Based on the *Festival and Cultural Events Initiative*, the Government provided €1.25 Million to launch the 2007 *St. Patrick's Festival*. This Festival, which included a five-day program of events, demonstrated High Tourism Yield Impact, as out of 1.5 million spectators, 400,000 were international overseas visitors (26.7%).<sup>81</sup>

As a measure of success in Sports, the Department of Arts, Sports & Tourism has allocated €83 Million to Fáilte Ireland to secure an Irish stopover of the *Volvo Ocean Yacht Race* in Galway in 2009, and the *Solheim Cup* (Ladies *Ryder Cup* Equivalent) in Kileen Castle in 2011.

### **Role of Partnerships & Funding to Support Major Events**

In conjunction with the N.D.P., the Department of Arts, Sports and Tourism has developed an *Arts and Culture Plan 2008*, which sets targets for increasing access and audience scope and to increase visitor numbers in 2008 to three million. At a general level, the Department's mission is: "To enrich Irish society by supporting the growth of a competitive and sustainable tourism industry and increasing access to, and participation in sport, the arts and culture"<sup>82</sup>. The *Plan* includes a section on developing major international arts and culture events. The Department identifies regional festivals as playing a central role in extending audiences' access to the arts.



In 2008, additional funding has been allocated to expand the programs at regional arts festivals, such as the *Galway Arts Festival* and *Festival of World Cultures* in Dun Laoghaire, so as to extend public access to high quality national and international events. Furthermore, the *Dublin International Art Exhibition 2010* has been developed based on the need for a contemporary arts festival in Ireland and is expected to become a core event for the arts community, alongside the *Venice Biennale*.<sup>83</sup>

The Irish Government's Department of Arts, Sport and Tourism's *Statement of Strategy 2008-2010* further identifies an appropriate framework to support future promotion and marketing for the sustainable development of the tourism sector from three general categories: Arts, Culture and Film; Sport; and Overall Tourism. The document lays out the high-level goals and objectives for each category, and lays out specific actions and performance indicators to measure post implementation.

In the area of Arts, Culture and Film, the Department recognizes that:

*Investing in Irish artists is an investment in 'cultural branding' for Ireland... supporting the arts may lead to the next Riverdance or the next Tony or Academy award for an Irish theatrical or film production, and continue to ensure Ireland's international reputation as a culturally vibrant place. Irish-based work also attracts international audiences into Ireland – for example Wexford Festival Opera and Dublin Theatre Festival, among others, bring international visitors to Ireland in the shoulder and off seasons, and a very successful Galway Arts Festival (along with the Galway races), played an important role in rescuing the West from the negative economic impact of the water supply crisis in 2007. (p. 10)*

Furthermore, in relation to Sports and Tourism, the Department has recognized that the selection of London as the host city for the *2012 Summer Olympic Games and Paralympic Games* offers opportunities for Ireland in many ways. In 2006, a Task Force was established to prioritize these opportunities and develop a strategy to ensure that benefits flow to Ireland. This Task Force has focused on the following areas<sup>84</sup>:

- Assessing the quality and suitability of Ireland's sporting and ancillary infrastructure in terms of its appeal to countries and athletes preparing to take part in the London *Olympics and Paralympics*;
- Completing an economic evaluation of the potential impacts in the sectors of tourism, business and sport arising from Ireland's proximity to the *2012 Games*; and
- Identifying other beneficial spin-offs from the *Olympics and Paralympics*.
- The roll-out of the Department's *Strategy* over its three year period is expected to include specific goals relating to festivals and events<sup>85</sup>:
- Developing Cultural Tourism whether for particular elements of Irish culture such as writing, art or music or through cultural festivals and events of broader appeal;
- Developing Sports Tourism further through the attraction and hosting of major international sports events and developing the tourism potential of the country's national games as well as horse and greyhound racing; and
- Fostering an ethos of cooperative marketing of arts, sports, cultural and tourism events, festivals and programs.

One of the key actions associated with these goals and the overall objective of growing Ireland's Tourism sector included facilitating the efforts of Fáilte Ireland to attract major sports events. The Department of Arts, Sport and Tourism assists Fáilte Ireland to secure funding to support major events that are won, and

to encourage incremental visitation and media publicity to Ireland, and thereby increase tourism revenues.<sup>86</sup> In order to maintain sustainable development of the tourism sector, the Department ensure that major events are measured using key performance indicators, including: foreign revenue earnings, overseas visitor numbers, promotable visitor numbers, room nights, per diem spend, regional performance, and market share.

### **Case Study: Wexford Festival Opera & Galway Arts Festival**

Research conducted by Quinn (2006) on the *Wexford Festival Opera* and *Galway Arts Festival* indicate that festivals in Ireland have the ability to evolve into significant tourism generators, through increasing degrees of commercialization and commodification. Quinn's research indicated that festivals in Ireland tend to "emerge as bottom-up enterprises, small in size, local in scale and initially, heavily dependent on volunteers."<sup>87</sup> In the last 35 years, the role that festivals have played in general arts development in Ireland has led to the development of new infrastructure, local resources, business expansion in the arts, and increased tourist audiences.

The *Wexford Festival Opera* was established in 1951 and the *Galway Arts Festival* originated in 1978, based on specific artistic needs within the two locations. Both festivals were inspired by visionary individuals who showed immense commitment and determination, and who managed to propel the festivals forward as tourist attractions. The *Wexford Festival Opera* began as a means to produce rare opera at international standards, with no specific ambitions regarding tourism. However, since opera is so expensive to produce, from the early 1950s the *Wexford Opera* favoured tourist development over local audience promotion due to the greater revenue-generation it could produce. The Opera now employs five year-round staff, attracts audience flows of 20,000 during three weeks in October, and receives significant funding by the State's Arts Council (€950,000 in 2005).<sup>88</sup> In contrast, the *Galway Arts Festival* was intended to bring as many people as possible to the western region of Ireland to celebrate local arts activities, and host visiting national and international artists. Because of the local/regional focus, the *Galway Arts Festival* did not attract many visitors in the early years, but when marketing extended outside the region in the 1990s, it grew to be the largest national arts festival in Ireland, and public agencies like the Arts Council were quick to respond. By 2003, the *Festival* had four full-time employees and a budget of €1.3 Million, and the annual audience base of about 100,000 included 22% overseas visitors.<sup>89</sup>

Through relationships with the Arts Council of Ireland, state tourism agencies, and national media, tourist demand has grown exponentially for these festivals, which in turn has increased the festivals' revenue flow and economic viability. In the Wexford case particularly, introducing tourism revenue was particularly important because "local audiences could not have sustained either the specialist repertoire or the high prices that the festival needed to charge in order to become an opera festival of international standing."<sup>90</sup>

### **Best Practices in Commemorative Events**

Following the country's tradition of commemorating its past with dignity and respect for others, Ireland has already put in place an action plan for commemorating the events of 1916 in 2016. This is seen as a year of seminal importance with respect to the achievement of Ireland's independence. Some of the actions already in place for the upcoming celebrations include the following:

- Holding a substantial commemoration event in the lead up to 2016;
- Establishing the General Post Office (GPO) in Dublin as a museum of celebration of Irish progress and achievement across a broad spectrum as a landmark 1916 centenary project;
- Supporting the creation of programs of events in all cities and towns in Ireland;
- Establishing an interpretative centre in connection to the refurbished GPO on Moore St., to honour those who fought in the 1916 Rising; and
- Providing a fund for community groups to apply for support for the refurbishment of existing monuments commemorating events in the 1913-23 period.

## **NORTH EAST ENGLAND**

### ***Festivals & Events Strategy (2006)***

**Vision:** *By 2010, North East England will be known as a region that hosts and develops high quality festivals and events, and nurtures local talent and creativity for maximum economic and social benefit.*

#### **Background & Overview of the Strategy**

Following the launch of the *North East Tourism Strategy 2005-2010*, *One NorthEast* - the regional development agency - and tourism-related partners throughout North East England began planning for a strategy dedicated to festivals and events. These partners included: Sport England, Arts Council England - North East, Culture North East, Culture<sup>10</sup>, and members of the private sector. The purpose of creating the *Festivals & Events Strategy* was to "clarify the role that festivals and events play within key economic and social agendas, identify future development requirements, and clarify the strategic relationships with regional and sub-regional economic programme activity."<sup>91</sup> The expected outcome of the strategy at a general level was improvement in the economic and social impacts of festivals and events in North East England, and better coordination of investment in festival and event activity.

*One North East* recognized that festivals and events are capable of being positive economic and social drivers that showcase cultural diversity, increase regional pride, and attract tourists and tourist dollars to the region. Tourism is of enormous importance to the economy of North East England - 8.5 million tourists visited North East England in 2006, bringing in £3.4 Billion to the regional economy, and directly employing 55,000 people (5.2% of North East jobs). Over the past 10 years, regional partners have invested over £200 Million in iconic attractions, such as the Baltic Centre for Contemporary Art, the Gateshead Millennium Bridge and Sage Gateshead. The region also contains two World Heritage Sites: Hadrian's Wall, and Durham Cathedral and Castle. In terms of festivals and events, the *Tall Ships Race* generated an estimated visitor spend of £47 Million in 2005 from an estimated 1.5 million visitors, and the *Great North Run* attracts over 47,000 runners with 29,000 coming from outside the region on an annual basis.<sup>92</sup>

*One NorthEast* saw opportunities to further increase the tourism economic impacts of festivals and events to North East England by building a strategy to "increase the number, quality, profile and legacy of festivals and events."<sup>93</sup> Since the motivation for festivals and events differ, and their impacts (both social and economic) are unique, the first challenge identified was to determine which activities within each event or festival required extra time and resources. The central goal of the strategy was to provide an action plan that demonstrated how to focus on the right event for the right venue, with investments based on quality, added value, and value for money. Furthermore, the strategy had to be connected to other long-term regional goals, with a clearly defined relationship to tourism, image, business, and education.

Four central objectives were identified:

- To build and improve the region's capacity to deliver high quality festivals and events of all sizes;
- To create, nurture and develop indigenous festivals and events throughout the region to maximize their economic and social potential;
- To attract and host high profile and high quality events of international and national significance; and
- To maximize sustainable, inclusive regional economic growth from festivals and event activities.

The strategy mentioned four principles that were expected to underpin each of these objectives: build audiences, encourage participation, be fun, and leave a legacy.<sup>94</sup> Furthermore, each objective was

considered from both a national and regional context, and measurement outputs and outcomes were identified for the long-term. Unlike some of the other jurisdictions that have been profiled in this report, North East England's *Festivals & Events Strategy* incorporates tactics for developing smaller festivals, as well as attracting major international events.

### **Management and Implementation of the Strategy**

*One NorthEast* put the Culture<sup>10</sup> team - the destination marketing organization for the municipalities of Newcastle and Gateshead - in charge of implementing Objective 3 of the *Festivals & Events Strategy*: setting up a framework for securing and evaluating major international events. The Culture<sup>10</sup> team, along with other regional partners such as Culture North East, was also asked to develop investment plans based on current demand for "iconic, recognizable and impressive" cultural and sporting facilities to host the events.<sup>95</sup> Another action item was to develop a Tourism Network North East eBusiness platform - Desti.ne - to provide information on these events for visitors and industry representatives, and generally build regional awareness of the importance of major festivals and events. As laid out in the Strategy, the goal for 2010 was for Culture<sup>10</sup> and other regional partners to fulfill the following goals:

- Two to three high profile new international events each year attracted to North East England;
- High spending national and international visitor numbers increasing year on year;
- Increased public and private sector sponsorship in the delivery of major festivals and events; and
- Increased levels of national and international positive media coverage from festivals and events taking place in North East England.

### **Performance Measurement & Impacts of Major Events**

According to North East England's *Festivals & Events Strategy*, major events were seen as potential catalysts for change in global perception of a place, as well as instigators of local pride, however these elements are difficult to measure. Hence, in order to determine the value of attracting major international events, the Culture<sup>10</sup> team considered the traceable economic benefits, such as: investment in physical regeneration projects (i.e., stadiums and galleries), and greater potential for inward investment by improving the image of the region.

Other benefits of international events are measured by<sup>96</sup>:

- Number of attendees;
- Number of attendees from outside the region;
- Number of international attendees;
- Number of overnight stays;
- Net Visitor expenditure;
- Monthly distribution of visits;
- Employment supported;
- Increased opportunities for artists and performers;
- Value of contracts placed with regional business;
- Integrations with other economic development activity;
- Value of media coverage;
- Changes in national and local perceptions; and
- Number of journalist visits from within/outside of region.

In addition to these outputs, the Culture<sup>10</sup> team considers Strategic Added Value (SAV) activities that will impact North East England through the attraction of major international events, including an increase in: coordination, knowledge sharing throughout the region, and awareness raising.

## **Regional and City-Driven Strategies for Festivals & Events**

At the regional level, the *Festivals & Events Strategy* was devised to address the challenges of uncoordinated bidding on mega-events, and to help build partnerships to work in tandem with the Culture<sup>10</sup> team to ensure the legacy of the events.

Launched in 2003, the Culture<sup>10</sup> program was uniquely geared towards delivering world-class events and festivals for North East England, by aiming to "support ambitious, challenging and transformational events to increase participation, develop new audiences, animate the area's outstanding public spaces and cultural institutions and build the region's national and international profile."<sup>97</sup> The leaders of Culture<sup>10</sup> produce and partner a program of festivals and events in partnership with regionally based organizations, and aim to increase build on this event profile until 2010, based on the work that was done in Newcastle and Gateshead to bid on the *European Capital of Culture* designation.

Culture<sup>10</sup> developed four distinct festivals in 2005, which were all part of the *2005 Alive* event. These included the *Festival of Rivers and Seas*, at which the *Tall Ships Race* was a centrepiece; the *Festival of Sport*, with the *Great North Run* as the highlight, along with the *British Touring Cars Championship* and *Million Mile Challenge*; the *Festival of Visual Arts*, built around the *British Art Show*; and the *Festival of Music*. Since the *Festivals & Events Strategy* was launched, this organization has also been responsible for determining which "footloose" major events should be bid upon and developing a coordinated approach to the bidding process.

Culture<sup>10</sup> was originally a city-driven program, part of the *NewcastleGateshead Initiative*, which is the destination marketing agency for Newcastle/Gateshead. As a tourist promotion, the cities of Newcastle on Tyne and Gateshead linked together under the banner "NewcastleGateshead" to spearhead the regeneration of North East England. Consequently, One NorthEast - the regional development agency for North East England - has put the task of bringing new international events to the region as a whole under the charge of the municipalities of Newcastle and Gateshead. The City of Newcastle alone has a population of 260,000, while across the river, Gateshead has a population of 190,500. Some of the festivals initiated through Newcastle/Gateshead include: the *AV Festival* (UK's largest international festival of electronic arts), *EAST'08* - a Chinese New Year event, and the *Newcastle Beer Festival*. In terms of infrastructure, Newcastle houses the 11,000-seat Metro Radio Arena, while Gateshead has the Norman Foster-designed Sage Gateshead performing arts venue and Gateshead International Stadium.

## **Management and New Initiatives**

Following the launch of the *Festivals & Events Strategy*, One NorthEast chose to hire a consulting firm to produce an independent report on the progress of the *Festivals and Events Strategy*, including the work of the Culture<sup>10</sup> team, and to provide advice for future investment. In December 2007, SQW Consulting published the first process report. Realizing that it is impossible to have an equal geographic spread of activity, it was determined that "investment should be based on quality, added value, and value for money."<sup>98</sup> In order for North East England to be positioned on a global scale for their festival and event industry, it was determined that the region would need to deliver fewer, bigger, higher quality events to gain maximum economic impact from all investments.

This report further indicated that although the Culture10 team had performed well, future investment needed to focus on raising the quality of events and reducing the number of events being funded. The consultants recommended developing more events at iconic locations, and for more investment in the major cities of Newcastle/Gateshead, where the majority of events were held and the biggest impacts were generated.

Through this consultation process, the *Tall Ships Race* in Newcastle/Gateshead was identified as an event that achieved a range of economic, social, profile and cultural objective; and it also required a great deal of coordination and cooperation. The consultants' recommendation was that "genuinely major events provide a platform for all these benefits... the bigger the events, the easier it is to bring partners together."<sup>99</sup>

Furthermore, it was identified that most of the cultural event planning tends to occur more at the city and venue level, yet this can be used to drive regional development. In this case Culture<sup>10</sup> has a great advantage as an organization for developing cultural events, since it is based in NewcastleGateshead, with jurisdiction over the entire region. However, the consultants identified the need to make a clear delineation of expectations between city regions and rural areas, and to work with three categories of events in different ways.

The *Festivals & Events Strategy* was criticized for not providing a full action plan, however, one of the benefits was Culture<sup>10</sup> and One NorthEast's creation of the *Bidding and Development Strategy for Major Events (2007)*. This document made clear that although communication and partnership work in the arts and culture sector was good, particularly following the *Capital of Culture* bid for Newcastle/Gateshead, partnerships in the area of sports were very weak. The strategy highlighted the following recommendations for North East England's future success in attracting major events:

- Setting up an events diary and regional sports event forum;
- Improving partnerships in the area of sports, including an engagement with key influencers and decision makers with National Governing Bodies of Sport (i.e., UK Sport), and more coordinated investment in infrastructure for sports events;
- More strategic involvement of public sector bodies with event organizers and a forum to realize the and coordinate regional ambitions;
- Developing a "ring-fenced" resource to support sports events; and
- Building a reputation for the region and its capacity for hosting major events by hosting major sub-elite and youth sports events, and by supporting selected home-grown events.

### **Future Plans**

Like in Scotland, North East England has also recognized the London 2012 *Olympic Games* as providing many opportunities for the region, i.e., to host training and preparation camps. In order to ensure the best possible impact of mega-events, the partners would need to market and promote through a collective strategy to attract as many visitors as possible, from the widest scope possible. A sponsorship plan to increase private sector investment has been recommended as a way to gain more resources for the bidding process.

### **Case Study: Great North Run**

In terms of history and tradition, the *Great North Run* in North East England is considered to be the most high-profile sporting event in the world. Since 1904, it has started every year at 1pm on the first day of the first month of the New Year. However, the roots of this 14-mile open road race from the Morpeth to Newcastle Road have been traced back to the middle of the 19th Century, when a former world champion for long-distance running used to train on this track. Over the past 104 years, many of the world's greatest long-distance runners have attended the *Great North Run*. In order to make the run more of a celebratory event, the course was extended so that runners would finish at the Newcastle Civic Centre.

### **Case Study: Tall Ships Race**

The *Tall Ships Race* is considered to be the world's largest international sailing event, with up to 30 nationalities participating each year. The first race was held in 1956. Currently, between 80 and 120 Tall Ships take part in the event each year. It was a significant boost to the North East England economy for Newcastle/Gateshead to host the race in 2005 on the River Tyne. According to research completed in 2006, the arrival of the *Tall Ships Race* to Newcastle/Gateshead brought 1.5 million visitors, with more than 300,000 people extending their stay in the region for up to 10 days.<sup>100</sup> Furthermore, in comparison

to the last visit of the Tall Ships in 1993, overnight visits had increased by 10%. The hard work of the Culture<sup>10</sup> team and other regional representatives had much to do with this increased visitation. Furthermore, following the launch of the *Festivals & Events Strategy*, Hartlepool won the bid to host the *Tall Ships Race* in 2010, and was chosen as the finishing point for the race. This placement has the potential to draw even more international tourism with increased stays in North East England for 2010. Hartlepool itself has a population of just over 90,000, and has been known primarily as a port city. In anticipation of the race, under the lead of PD Ports Ltd and Tees Valley Regeneration (a government-funded agency set up through One NorthEast), both the public and private sectors are investing in the £500 Million development of Hartlepool's Victoria Harbour.<sup>101</sup> This waterfront development will not only improve the marina and docks, but will include 3,430 homes, 57,000 sq.m. of office space and 17,000 sq.m. of retail space by 2010, thereby generating new employment and overall economic regeneration of the town. Furthermore, as of 2008, a new £62 Million building has been approved for construction at Hartleford College, and is expected to open in 2011, also through the benefit of public and private sector funding.

This case is a good example of how an entire region has recognized the benefits of attracting a major international event, and how an event can be a catalyst for urban regeneration.

## **NORTHWEST ENGLAND**

### ***Strategy for Major Events (2004)***

#### **Background & Overview of the Strategy**

While North East England has been focused on developing a *Festivals & Events Strategy* that targets a wide scope of events, including: major international events, regionally-significant events, and local events; England's Northwest has identified the implementation of a *Strategy for Major Events* as a means for future economic regeneration of the entire region. Having already hosted the 2002 *Commonwealth Games* in Manchester, and with Liverpool's successful bid for the *European Capital of Culture* in 2008 (which beat out Newcastle/Gateshead), the Government realized that the success of events in its major cities could help to improve the whole Northwest.

The Northwest Development Agency (NWDA) commissioned a group of experts with international event marketing experience to consult over 300 organizations, and with the help of a Regional Major Event Steering Group, a full *Strategy for Major Events* was developed over the course of 2003/2004. Due to the sensitive nature of the major events industry, once published, the Strategy did not include any reference to specific event proposals.

The Northwest of England has world-class venues, such as the Athletics Stadium in Manchester, and event infrastructure in Liverpool (King's Dock) and Blackpool. Having already hosted the *Commonwealth Games*, along with regular events like the *Open Golf Championships* and the *Grand National*, the region already had great credibility for hosting major events at the city level. However, a need was identified for retaining the skills and knowledge acquired from investing in these events and sharing this knowledge between all event-related organizations across the region.

The main objectives of Northwest England's *Major Events Strategy* were:

- To ensure that the region can take maximum advantage of, and be adequately prepared for, staging and bidding for major events;
- As far as is reasonably practicable, to manage intraregional competition to avoid wasted effort and resource;
- To develop regional mechanisms for sharing and developing expertise in the staging and bidding for major events;

- To develop evaluation tools to consistently measure the impact of major events and guide investment decisions;
- To provide a strategic framework to support bids to national and international organizations for the funding of major events in the Northwest; and
- To maximize the opportunities to secure engagement and funding from the public and private sectors.

### **Identification & Attraction of Major Events**

In terms of planning an event portfolio, the Strategy recommended fulfilling each level of a three-tiered approach:

- Global Giants - existing events that act as "flagships" for the region;
- Organic Excellence - events that the region can grow into world-class events to reflect the region's character, including existing and proposed events that can meet the economic and media impact criteria; and
- Attack Zone - existing world-class events with a proven record in delivering specific economic targets or high profile value won through an international bidding process (i.e., sport events).

Key actions for developing this portfolio included:

- Develop an events portfolio which will focus initially on events which can optimize the use of existing venues (built and natural) or those venues currently deemed 'likely developments';
- Consider the region as a whole as well as individual cities and sub-regions and balance these two dimensions through the events portfolio and resulting resource allocations. This balance must also encourage the competitive edge of the strongest elements (such as Liverpool and Manchester) and not diminish the whole proposition in search of inclusivity;
- Consider the creation and ownership of events by the region and securing some significant 'quick wins' and ensuring wherever possible that events can be spread throughout the year;
- Develop processes to assist the management of intra-regional competition;
- Develop a broad portfolio of events including arts, culture and business but recognizing that sports events will be a major economic focus of the strategy;
- Explore and exploit the partnership opportunities identified with several of the region's brand leaders;
- Develop collaborative partnerships with appropriate countries or regions particularly where they have event development organizations and where there is an opportunity to share knowledge and experience; and,
- Where appropriate, examine the opportunities for bundling smaller events under an umbrella (theme, geographic or time), which gives these events the ability to create a greater impact and benefit from economies of scale and collective promotions.



### **Management, Implementation and Impacts of Major Events Strategy**

The Regional Major Events Steering Group was chosen to implement the *Major Events Strategy*, in collaboration with the NWDA. Unlike North East England, no dedicated body was set up to look after the major event industry on its own, yet this Steering Group included individuals who were still working in other facets of the public and private sectors in Northwest England.

In terms of evaluating the impacts of implementing this Strategy, NWDA determined that there are only two key *measurable* beneficial characteristics of major events: economic benefits and media benefits.<sup>102</sup> Social and commercial impacts are obviously important, but not precisely measurable. On the other hand, the economic benefits of a major event were seen as being measurable through the incremental value added to the economy - in this case, by whether an event has maximized the number of visitors from outside the Northwest region. In terms of media benefits, NWDA indicated that the value of short term publicity for major events could be estimated by the promotion expenditure and cost of advertising saved, and in the long term, publicity could lead to enhanced image of the destination and increased visitation in the long term - measurable by the expected volume of future tourism.

One way in which the NWDA was able to calculate the economic impact of the Northwest of England's major event industry to date was by considering levels of sponsorship in the different major event categories. They determined that global events sponsorship in 2002 was worth £5.26 Billion, divided as follows:

- Sport - £3.53 Billion (67%)
- Festivals - £0.42 Billion (8%)
- Arts - £0.31 Billion (6%)

Since the *Strategy* was developed in 2004, the NWDA has been involved in events that have generated an estimated £40 Million to the regional economy.<sup>103</sup> The success of the *Major Events Strategy* has further been legitimized by the fact that major event development is again identified as a key action in the new versions of the *Regional Economic Strategy* and *Regional Tourism Strategy*, which were issued in 2006.

### **Policies and Programs to Support the Strategy**

A Northwest Steering Group has been established to develop and implement plans to ensure that the region fully plays its part in supporting the *2012 Olympic Games* in London, and makes use of the opportunities that are presented leading up to these events. This organization, in collaboration with NWDA, produced a strategy entitled *Be Inspired: Northwest Legacy Framework for the 2012 Games*. This document identified six legacy themes for Northwest England where the most opportunities to benefit from the Games can be gained<sup>104</sup>:

- Business;
- Sport & Physical Activity;
- Major Events;
- Cultural Olympiad;
- Tourism & the Visitor Economy; and
- Skills & Volunteering.

With respect to major events, the same priorities that were laid out in the *Major Events Strategy* are reemphasized in the *Be Inspired* Framework. These are: "to ensure that England's Northwest continues to develop and host major national and international events, recognizing that there is increased national and international competition to stage major events."<sup>105</sup> From an infrastructure perspective, this includes expansion and redevelopment of the Arena and Convention Centre Liverpool by 2012. It also means ensuring strategic links with other agencies, such as UK Sport and the National Governing Bodies of Sport.

Expected outcomes of developing major events in relation to the legacy of the *2012 Olympic Games* are as follows:

- By 2012, the region will have staged a significant number of World, European and Olympic Qualifier events related to Olympic and Paralympic sports;
- From 2008 - 2012 there will be a range of major events in the region which will augment the Cultural Olympiad, including links to Liverpool 08 through to Preston Guild celebrations in 2012;
- The region will look to develop football related activities in the build up to, and during, the Olympic football tournament matches being staged at Old Trafford; and,
- Major events linked to 2012 will make a positive contribution to the economy of the region.

#### **Case Study: 2002 Commonwealth Games**

There has been a lot of praise for the Northwest of England's success with regard to the 2002 *Commonwealth Games* held in Manchester. The Chairman for the London Organizing Committee for the Olympic Games (LOGOC), Lord Sebastian Coe, made it clear in a speech to the NWDA that "without the *Commonwealth Games* in 2002, I doubt that there would have been a bid for the 2012 Games."<sup>106</sup> Coe claimed that East Manchester's work in urban regeneration as a result of the 2002 bid, gave great hope for the East End of London where the *2012 Olympic Games* take place, and Liverpool's nomination as the Capital of Culture 2008 is a good example of successful regional partnerships.

A great deal of effort went into staging the *2002 Commonwealth Games*, beginning with an Opening Ceremony, which took place in the new purpose-built City of Manchester Stadium at *Sportcity*. Many believe that it was the intention behind this new Stadium, which cost £90 Million to construct and has seating for 38,000 people that made the *2002 Games* the best to date. The *Games* ran for 10 days, from July 26 to August 4, and 17 sports were represented, with over 4,000 competitors coming from 72 nations within the British Commonwealth.<sup>107</sup> Approximately one million visitors are thought to have come to Manchester to see the event live, and the world television audience was estimated at one billion.

The NWDA retained FaberMaunsell and partners to determine the benefits of the *Commonwealth Games* on key lessons learned during the planning process. According to the final report, the *Manchester 2002 Commonwealth Games* acted as a stimulant for regional partnerships to secure about £600 Million in private and public sector funding to develop *Sportcity* in East Manchester, and to improve transportation routes to and from the City centre. Other venues and attractions were added as well, including: the National Cyclone Centre, the Millennium Quarter, Bridgewater Hall and the renovated Manchester Art Gallery. The Manchester International Convention Centre and the Great Northern Square also joined forces to improve business tourism in the lead up to the Games.

According to the FaberMaunsell report, the primary main economic, social and other impacts of the Games were identified as follows:

- Creation of Employment - 20,000 new jobs;
- Investment in the Region - £600 Million in direct investment, and £2 Billion secured over the next 15 years;
- Sporting Legacy - world class sporting facilities, events and participation in sport;
- Improved Transport Links - new rail station and expanded Metro;
- Creation of Business Opportunities - 250 companies obtained contracts worth £22 Million, and a legacy of events planning and operation was formed;
- Improved Image of the Region - media coverage reached one billion people, which helped to boost tourism, and press coverage reached the equivalent of £1 Million in PR value to the region;

- Increase in Visitor Numbers - 1 million visitors in 10 days and £18 Million in net expenditure, including 50,000 overseas visits to Greater Manchester - plus an additional £46 Million was spent by visitors in the region during and since 2002, with an estimated 300,000 additional visitors each year as a result of the Games;
- A Culture of Volunteering - 10,000 volunteers worked on the Games; a special designation was developed as incentive for the volunteers and 2,250 people gained a Level1 in Event Volunteering; and
- A Cultural Legacy - the *Spirit of Friendship Festival* was developed to celebrate the Commonwealth and the Games with 2,000 events throughout England, of which 200 events were held in Northwest England resulting in ongoing cultural programs.

This last impact is particularly relevant, as it shows that a major event cannot and should not be planned in isolation. In the case of the *Commonwealth Games*, hosting smaller cultural events to celebrate the larger events improved the Games' legacy and created more overnight stays.

With respect to lessons learned from the planning process, many of the models that were applied for the *Games* have since been used for other events in the Region. The bid for the *Games* began in the early 1990s, and was won in 1995. The bid was also considered to be an opportunity for developing effective partnerships between Central, Regional and Local Government, along with the private sector, since it was evident that the *Games* would create a legacy for the Northwest. Consequently, the bid was incorporated into a long-term, strategic urban regeneration framework. This approach was considered appropriate given the capacity of facilities in Manchester for delivering the events; however, the report indicates that this could not occur in many other locations within the UK. Once the bid was won, strategic direction was given to Manchester City Council, who created an operating company called Manchester 2002 to deliver the *Games*.

Key lessons learned during the planning process for the *2002 Commonwealth Games* were identified in the FaberMaunsell Report as:

- The Vision - clear objectives and agreed outcomes that fit with other regional and national strategies from the outset (i.e., linking the Games to the strategic regeneration of East Manchester);
- Partnerships - Manchester City Council coordinated partnerships with public, private and voluntary organizations well in advance of the Games;
- Performance Management and Financial Control - the management team put effective procedures in place to allow for financial control and accountability, with a robust performance management system to ensure delivery of agreed on income and profits;
- Leadership - a strong management team of key individuals with leadership, financial, commercial and operational skills was put in place for effective delivery of the Games;
- Specialist Skills - individuals and teams with specialist skills were recruited to run the event (i.e., skills in transport, technology, media relations, sponsorship, etc.);
- Attention to Detail - key measures were put in place to ensure a positive visitor experience (i.e., effective transport to and from venues, entertainment en route, and associated cultural event planning), as well as development of contingency plans;
- An Inclusive Approach - a great deal of work was put into integrating the Disability Games with the main events; and,

- A Desire For Success - a major volunteer program and other measures were put in place to get local people involved and excited about the event.

In addition to these planning lessons, the strategic regeneration framework yielded a number of legacy activities throughout Northwest England. The New East Manchester Partnership was developed in 1999 to attract investment and aid disadvantage communities in East Manchester in the lead up to 2002, so that the benefits of all the *Games*-related work would be sustainable. Programs were put in place to create positive legacies for business, tourism, health, education, arts, volunteering and young people. These activities proved that a successful legacy can be achieved if attention is focused equally on delivering the major event and attending to wider regional objectives.

It was out of the legacy of the 2002 *Commonwealth Games* that Northwest England went on to host the *Labour Party Spring Conference* and *Champions League Final*, and that Liverpool successfully bid on the *Capital of Culture 2008* designation. During 2008, Manchester is expected to host six international events worth £16.6 Million, most of which will be held at venues that were built for the 2002 Games.<sup>108</sup> It is estimated that between 2002 and 2005, tourism brought an extra £350 Million a year to Manchester, and is now worth about £4 Billion annually, not including the widespread opportunities that have emerged for the Northwest region as a whole. Furthermore, it was based on the results of this Benefits Study that the NWDA produced the *Major Events Strategy*.

## **UK SPORT**

### ***Major Events Strategy to 2012***

As part of this review, we have considered the strategic planning of a major event-related organization that is not connected to a specific country's government - the UK Sport Council.

**UK Sport Council (UK Sport)** is the United Kingdom's organization for directing the development of sport within the home countries of England, Scotland and Wales. The organization is made up of five departments and picks events that will raise the UK's international profile while harnessing the benefits of the events for the Nation and its athletes. UK Sport works in association with the Nations & Regions Group, whose aim is to ensure that the UK as a whole benefits from the opportunities created through London's successful bid for the 2012 *Olympic Games*.

UK Sport recognizes that international sports events are a driving force in the media, with over 85 sports operating at all levels.<sup>109</sup> For the benefit of all host jurisdictions and organizing bodies within the UK, the *Major Events Strategy to 2012* attempts to provide a better understanding of how these events are organized. For instance, events that have a regular calendar and move around the world are categorized as follows: Single sport championships; Multi sport championships; and, World Cups/Grand Prixes.

There are also different levels of events at each category: World level – i.e., Olympic Games, World Cup Football; Continental level – i.e., Pan American Games, European Championships; Regional level – i.e., SE Asia Games, Mediterranean Games; and, Political/Special Interest – i.e., Commonwealth Games, Gay Games.

As of 2007, UK Sport had a budget of £20 Million to invest on 120 events, including 29 World events through to 2012, with an additional £50 Million from Cities, Regions, partners and commercial bodies.<sup>110</sup> In order to choose the appropriate events for investment, the *Strategy to 2012* recommends gaining a clear understanding of the nature of an event, its franchise holder and the bidding and hosting requirements.

Furthermore, the *Strategy* calls for: Coordinated research leading to better intelligence and improved decision making; and, Improving standards of event delivery through effective knowledge transfer and sharing of best practice.

UK Sport's *Staging Major Sports Events: The Guide* was published by UK Sport in October 2003 and updated in February 2005. It was intended to help inform decision-making by organizers of major and world class sporting events in all UK jurisdictions. It highlights key areas that need to be considered when planning and preparing a bid for staging a major event, including: writing a strategy, preparing a bid, insurance and legal issues, security and policing, marketing, sponsorship, health and safety, data protection, volunteers, ethical considerations, anti doping and environmental issues.

In the section on strategy-writing, UK Sport advises that "time and effort must be spent on determining [one's] long-term attitude towards the staging of events" and that "bidding to stage a single event should never be done in isolation."<sup>111</sup> Some Key Points are provided for forming a sustainable strategy, including:

- What It Is - precise strategic overview of event-hosting aspirations for the next 10 years;
- What It Is Not - the strategy is not an application to receive funds for specific events - it is to assist the sport organization in assessing its ability to organize itself, look at long-term planning objectives for hosting major events, and consider how they fit with other business plans;
- Realism - most events won't be held twice over a 10-year period, thus it is essential to write a strategy that incorporates events that an organization has a realistic chance of securing and delivering to a World Class standard rather than writing an ambitious wish-list; it is also vital to be aware of the organizational requirements for running a major events and to leave recovery time post event, as opposed to cramming an event calendar full of high profile events back to back; also cycles vary considerably for sport - major events often need to be underpinned by smaller events that also require operational and financial resources;
- International Influence - most bidding processes culminate in a vote by members of the associated sport, thus making friends and influencing people can make the difference between success and failure - lobbying is critical, so the strategy should put in place a programme to enhance the organization's international credibility;
- Infrastructure - assess the skills and resources of the organization in order to run the proposed event, and identify possible venues and partnerships with key local authorities and other user groups that already have event strategies - there is potential to share resources if the ideas of both parties are compatible; and,
- Inflated Costs - all costs suggested within the strategy should be based upon previous events where possible, allowing for exchange rate, inflation and time lapse differences, as well as identified contingency monies to allow for the unexpected.

Furthermore, UK Sport recommends identifying all the risks where possible and assessing the potential impacts of these risks. Organizations are encouraged to consider within their strategies: Why is it important to host events? What will be the benefits? What demands will hosting events place on your organization in addition to everyday activities? With whom will you need to work to achieve your objectives? What are the timeframes and what are the possible threats (SWOT analysis)?

It is also suggested that all organizations prioritize events and collect key data and statistics for each event that is being considered. A timeline showing key bidding dates (if available) and suggestions for smaller events to underpin the major events is also recommended.

The Guide also provides suggestions for preparing a bid once an events strategy has been prepared. The following are key practices for ensuring a successful bid<sup>112</sup>:

### **Timeline and Key Dates**

Organizations need to be aware of the timescale for the submission and delivery of any bid, allowing sufficient time to plan and gain support from financial and political backers. Too often bids or events fail because insufficient time is allotted for thorough planning and feasibility studies. For many of the world's major sporting events, bids must be submitted several years in advance of the date of the event, and the preparation of bids can start several years before that. Even if the International Federation has a fairly short timeline for bidding, it is often vital for a national governing body to allow at least two to three years, in order to capture the support needed from other agencies.

### **Supporting Organizations for the Bid**

At the outset, establish which organization(s) must make the formal bid to secure the event, and who will be expected to sign the hosting agreements. It is essential that key partners and supporters are liaising from a very early stage. This varies from jurisdiction to jurisdiction, but in general, it is important to gain support from the following for the principle of staging the event:

- Athletes and international representatives;
- Local authorities and other stakeholders;
- National and Provincial sports council;
- Venue providers;
- Commercial backers;
- Local tourist associations;
- Broadcasters and the media;
- Those responsible for facility improvement/development (if necessary); and,
- Police (dependant on size/location and nature of event).

Access and support are also required from: transportation providers, accommodation providers, medical services, airports/airlines, and local and national suppliers of goods and equipment. It is also important to ensure that the dates/times of the event do not clash with any other event that could be a costly and difficult competitor for resources/exposure.

### **Research Past Bids**

Before bidding, research candidates who have succeeded and failed in the past, to determine what the key factors in the results were:

- Search for reports on past bids in the media and in economic and academic studies;
- Obtain copies of previous bid documents for the event;
- Contact other associations who have bid, and ask for information;
- Speak with international representatives of sports to get views on reasons for success or failure; and,
- Try to find out what alliances helped or hindered previous bids.

### **Competition**

Determine who else is bidding and gather information on their individual strengths and weaknesses.

### **Decision Makers**

Identify the key voters and decision makers, and gauge how to persuade them to support the bid. Identify people who influence the voters as they will be key figures – try to “influence the influencers”. It is vital to estimate the potential level of support for your bid prior to launching a bid.

### **Bid Presentation**

Different organizations will have different expectations of the bids they receive. Some will expect more expansive presentations than others. It is important to look at previous presentations from both successful and unsuccessful bidders. Aim for quality.

### **Cost**

Identify the true costs of the bid process and the costs of staging the event if the bid is won. Past experience is invaluable, but be aware that the figures from other events can be influenced by factors such as cultural differences, political or economic climate, or levels of support from committed partners. Therefore, it is necessary to include a contingency sum of money to cover unforeseen expenditure.

### **Key Strengths and Weaknesses**

It is crucial that the destination's strengths are identified and woven into the campaign, while solutions and tactics are worked out to counteract the weaker aspects of the bid. Consider the following: What advantages does your bid have over your opponents? In which areas are your opponents stronger than you? What criticism might you face, and how can you counter this? What will your key messages be? What are issues which could seriously harm your bid? Do you have enough influence to capture the required number of votes?

### **Bid Presentation Considerations**

- How much networking is required? When, where and with whom?
- What are the key events, meetings, and gatherings at which you should be present, and at what level should you be represented?
- Who will project an appropriate degree of credibility, and generate trust and faith in the bid?
- Who is respected and known by those who will be voting?
- What political assistance is required for the bid?
- Who will generate public interest and inspire widespread support for the bid?
- Who has the political, business and operational acumen to create and deliver a winning bid?
- What/who are your key alliances/allies?

In summary, UK Sport recommends the following:

- Conduct appropriate research. Is the bid feasible?
- Can the jurisdiction fully deliver the technical requirements?
- Gather strong support, internally and externally, nationally and internationally;
- Win media support and work hard to maintain it;
- Learn from past successes and mistakes;
- Know when and where to gain support and votes;
- Know the strengths and weaknesses of your own bid and those of your opponents;
- Have a strong case, delivered at the right level, by the best team.

## AUSTRALIA

### Western Australia

#### ***Journey Further: An Arts and Cultural Tourism Strategy for Western Australia 2004-2008***

**Vision:** *To establish Western Australia as a leading cultural destination in Australia.*

**Mission:** *To bring together the arts, cultural and tourism sectors in a manner that creates rewarding and enriching experiences for visitors to and within Western Australia*

#### **Background & Overview of the Strategy**

As identified in Section 2, the national tourism organization for Australia differentiates various types of events by their subject matter, including: Cultural events, Sporting events, and Business events (MC&IT). The tourism organizations and stakeholders in Western Australia are currently focused on Cultural Events. According to Getz (2007), cultural tourists generally seek out a diverse range of local cultural experiences at a given destination. Based on recognition that arts and culture can be used to attract tourism, and that cultural tourism is a significant revenue generator throughout Australia, the Department of Culture and the Arts (DCA) and the Western Australian Tourism Commission (WATC) formed a strategic partnership to develop *Journey Further: An Arts and Cultural Tourism Strategy for Western Australia 2004-2008*.

The broad objectives of the partnership and the Cultural Tourism Strategy are to:

Strengthen the perception of Western Australia as an artistic and culturally rich destination;

Facilitate development opportunities and linkages that better integrate the arts, culture and tourism sectors; and,

Encourage product development that builds on strengths and identified opportunities and is appropriate and competitive for target markets.

Western Australia's unique bio-diversity and eco-systems set it apart from other jurisdictions, and these have formed the basis for the future of its tourism industry. The current branding structure emphasizes Western Australia as "Fresh, Natural, Free and Spirited," and emphasizes cultural tourism.<sup>113</sup> According to the WTO, tourists today are much more interested in participating, learning and interacting with the community, and Western Australia has consequently focused its *Arts and Cultural Tourism Strategy* to build on the arts and cultural sector that already exists in the region.<sup>114</sup> For instance, the Region has its own resident symphony orchestra, ballet company, opera company, several unique theatre companies, a state art gallery, institute of contemporary art, and is home to the famous *Perth International Arts Festival (PIAF)*. Traditionally, the Government was only investing in major sporting events.

In order to strengthen the perception of Western Australia (WA) as an artistic and culturally rich destination, one of the actions identified in the Strategy was to "cross-promote hallmark WA arts and cultural events that are of national or international standard" and ensure that "unique, hallmark events are identified early and linked into appropriate tourism networks."<sup>115</sup>

Despite the fact that the *Arts and Cultural Tourism Strategy* quite evidently speaks to all of Western Australia's events and tourism networks, Perth is identified as the major gateway for visitors to Western Australia. Perth has a population of 1.55 million as of 2007, with a well-established tourism infrastructure including: an international airport, a major performing arts centre (Perth Concert Hall), Convention Centre, historic theatre and modern music scene. Thus, while the various regions of Western Australia develop their respective capabilities to present local tourist products, the Department of Culture and the Arts



(DCA) and the Western Australian Tourism Commission (WATC) partnership recognizes that Perth will continue to be the starting point for visitors.

### **Management and Sustainability**

The partnership between the DCA and WATC is truly the basis of success for the Strategy, as is the development of an arms-length Government body called Eventscorp. Eventscorp is the events division of Tourism Western Australia, and is specifically dedicated to implementing elements of the *Arts and Cultural Tourism Strategy* that are aligned with new and existing major international events. It is important to note that this Strategy does not incorporate any MC&IT events, as these are considered to bring "business tourism" to Western Australia. The Perth Convention Bureau (PCB) is dedicated to increasing the business tourism segment and promoting Western Australia as a MC&IT destination of choice, and is a completely separate entity from Eventscorp.

Eventscorp is in charge of implementing a number of tactics in support of the *Arts and Cultural Tourism Strategy*, which include:

- Identifying and attracting a diverse range of world class events to Western Australia;
- Providing funding for both major events as well as regional events through the Regional Events Scheme and arts and cultural events through the ACE Scheme;
- Supporting and developing events from concept to successful implementation;
- Managing and growing events, where appropriate, particularly in regional areas;
- Leveraging tourism, business and media opportunities through events; and,
- Maximizing business tourism in conjunction with the Perth Convention Bureau.

### **Performance Measures**

Eventscorp understands that events are often considered the "added reason" for a visitor's decision to travel, and places high priority on post-event research in order to determine future funding and determine which future events they should attract. The organization recently won the rights to stage the following events in Western Australia: the *2007-2009 Australian Surf Life Saving Championships*, *Australian Safari 2007-2009* and the *ISAF Sailing World Championships* in 2011.<sup>116</sup>

### **Identification of Major Events**

In order for an event to be considered for the Western Australia Major Events Calendar, Eventscorp must either fund the event, or it must be a non-funded national or international event that attracts a minimum of 10,000 physical spectators, or part of a regular concert series attracting more than 3,500 spectators per performance. Furthermore, for cultural events to be included in any other tourism itineraries or promotional brochures, they need to be promoted 18 months to two years in advance and be guaranteed to be available for a two to three year period.<sup>117</sup>

The following is a list of Eventscorp's evaluation criteria for choosing events at the major international level specifically for funding:

#### 1) Economic Impact

This is calculated using: the anticipated number of interstate and international participants, spectators, support teams and others, the length of their stay, and their estimated daily expenditure.

Where possible, previous events are analyzed to obtain verification of potential numbers. Where an event is being held for the first time, a credible estimate of its potential economic impact is gauged through discussions with the applicant and other sources.

## 2) Media Impact

Eventscorp seeks information on the extent of the television broadcast into Western Australia's active, emerging and major markets. Markets include: Singapore, Malaysia, Japan, United Kingdom, Netherlands, Switzerland, New Zealand and Germany as well as Hong Kong, China, United Arab Emirates, Indonesia and South Africa.

An event which provides significant television coverage in Western Australia's priority and developing markets and which features tourism postcards and signage, will receive favourable consideration under this criterion.

## 3) Event Frequency

Eventscorp develops a program of regular events to ensure that cost savings are made on bidding and marketing. An event staged on a regular basis (for example, each year) will receive a favourable assessment under this criterion.

## 4) Private Sector Investment

The greater the revenue percentage provided by the private sector, the more favourable the assessment under this criterion.

## 5) Funding

Eventscorp is allocated a maximum level of funding each year. Sometimes, Eventscorp is faced with an event which may match the criteria but for which there are insufficient funds.

If funding is available then the process for considering the event proposal will continue. If there are insufficient funds, the applicant will be advised that, although an initial analysis justifies further consideration, Eventscorp's inability to fund the event prohibits the process going any further. Should funds become available, the analysis will continue.

## 6) Tourism Activity

Under this criterion, an event staged in a low season (such as July), is often more attractive than an event staged in a high season (such as September).

## 7) Prestige

Measurement of an event's prestige is based on the status of competitors, sponsors and the media, the involvement of international sports federations and the numbers of spectators.

## 8) A Developmental Approach

When Eventscorp analyses an event, it sometimes finds that it initially falls short of the criteria but has the potential to satisfy the criteria at a future date. In this situation, Eventscorp may conclude that the event is worth supporting throughout its development.

## 9) Community Involvement

Events are assessed on their potential to involve the local and larger communities in the event or in surrounding support activities. The more community involvement an event can create the more favourable the consideration.

## 10) Risk

The greater the potential risk, the more intense the analysis of that risk. Risk analysis will cover; revenue raising, the potential to cover losses, management expertise, the potential for injury, event cancellation and terrorism.

### 11) Alignment with Tourism WA's Iconic Experiences

Tourism WA encourages five different Iconic Experiences that make WA as a destination unique, these include; Sun, Surf and Sea Life, Outback Adventure, Forest and Flowers, People and Lifestyle and Food and Wine. Eventscorp looks to sponsor those events that promote and integrate these iconic experiences.

### 12) Diversifies WA Events Calendar

Eventscorp looks to sponsor a range of unique events that presents the community and visitors with a diverse calendar of events from sporting events to arts, cultural and community events.

### 13) Other Criteria

Other criteria may also be relevant including: the effect of the event on the corporate sector and how the event enhances the State's status and profile.

## Implementation and Impacts of the Strategy

Often the events that are chosen for funding by Eventcorp are a result of a variety of stakeholder interests. For instance, an eight-year agreement between the State Government, Australian University Sport and the University of WA and Challenge Stadium has given Western Australia the opportunity to host two events – the *Australian University Games* and *Indian Rim University Games* – from 2009-2016. This deal is expected to bring more than 12,000 students to Perth, generating \$17 Million in direct visitor spending for the Region, expose local and international students to different cultures, and build relationships between universities.<sup>118</sup>

Stemming from the Arts and Cultural Tourism Strategy, Eventscorp has also developed a new *Arts and Cultural Events (ACE) Scheme*. This \$1.5 Million scheme is expected to help develop events in fields such as music, fashion and dance, with the aim of supporting Western Australia's national and international profile as a leading and vibrant event and tourism destination. As of July 1, 2008, total funding of up to \$500,000 per year, over three years, will be made available through Eventscorp to support significant arts and cultural events in Western Australia.<sup>119</sup> Business Events, which include all MC&IT events, are **not** considered part of Eventscorp's jurisdiction.

Tourism Western Australia has also launched the *Tourism 2020* project, through which the organization has invited residents to discuss and debate the type of tourism industry they want up to and beyond 2020. Given that the tourism industry is rather new to WA, but over the past 20 years has come to employ about 6% of the work force, Tourism Western Australia prepared a discussion paper and held a series of state-wide consultative workshops, in order to gather enough information for a final strategy. Hence, the leaders in this jurisdiction's tourism sector recognize the importance and influence of public opinion in tourism development.

## Policies and Programs to Support the Strategy

As of February 2008, the State Government for Western Australia has planned to build a new \$1.1 Billion multi-purpose outdoor stadium in Perth, with seating for 60,000 people and the potential to expand to 70,000 seats.<sup>120</sup> Construction is expected to commence in 2011 and be fully complete by the 2016 football season – under consultation with representatives from various sporting bodies and the entertainment industry, as the stadium is expected to host rugby, soccer, cricket, major international athletic events, and concerts. In association with the stadium, Perth is expected to develop retail, leisure, cultural, residential and commercial elements, thereby revitalizing the surrounding community. Furthermore, it is expected to make Western Australia more competitive in the tourism industry. As identified by Tourism Western Australia's Chairman, Kate Lamont, Western Australia cannot be "left in the cold when it comes to bidding for world-class events that require a high-quality, high-capacity stadium," and the City has missed out in the past due to lack of capacity.<sup>121</sup>

### **Case Study: The Perth International Arts Festival**

The *Perth International Arts Festival* (PIAF) is the oldest annual international multi-arts festival in the southern hemisphere, and annually offers a three week program in February, full of theatre, music, film, visual arts, street arts, literature and free community events. The *PIAF* has been a mainstay of community life since it originally opened in 1953, and its mandate has remained the same: "to pursue excellence and to be cherished by the people of Western Australia."<sup>122</sup>

The *PIAF* has grown over the past 55 years to become a festival of major international standing, in part due to a commitment to "placing local works of excellence in an international context, raising the national profile of the arts, and to being informed by the cultural and environmental context of Western Australia including Indigenous culture."<sup>123</sup> Recent research indicates that the *Festival* attracts more than 300,000 attendees to both Perth and surrounding Western Australia.

Leading up to the *Festival* in 2003, the WATC was integral in maximizing tourist opportunities of particular exhibits, such as the 'Inside Australia' sculpture on the salt plains of Lake Ballard. By working in partnership, the WATC, PIAF and various other stakeholders managed to secure the exhibition as a permanent cultural tourism icon for Western Australia. Also, following the *Great Southern Chamber Music Classic* weekend in 2003, a resort from Denmark invested in a new performance venue with 200 seats to be used in the 2004 PIAF Great Southern Program.

The Perth-based *Festival* has been a catalyst for growing arts and cultural tourism development throughout Western Australia. However, it is important to note that without the investment of various segments of the Western Australian Government in infrastructure and other resources within the City of Perth itself, the benefits would not have extended throughout Western Australia.

### **Victoria, Australia**

#### **Victorian Major Events Company (VMEC) - *Strategic Framework for the Approval of Major Events***

The State of Victoria is located in the SE quadrant of Australia, and contains the major city of Melbourne. Victoria has successfully attracted events in all sectors, including the *Australian Formula 1 Grand Prix*, the *2006 Commonwealth Games*, the *2007 FINA World Swimming Championships*, the *Melbourne Food and Wine Festival*, the *Melbourne International Jazz Festival*, and the *Melbourne Fashion Festival*. It should be noted that while each of these events occurred in the City of Melbourne, the benefits of the events have been felt at the State level, and were evaluated prior to the funding of each event.

During the early 1990s, the State Government established the Victorian Major Events Company (VMEC) to "attract tourism to Victoria, raise Melbourne's international profile, and instill community pride", having recognized that major events "are Victoria's competitive advantage."<sup>124</sup> As an event procurement organization, the VMEC has been modelled by a number of other jurisdictions, including Scotland. In particular, the City of Melbourne and State of Victoria have created a worldwide reputation for their world-class events calendar. The event calendar development derived from the State's publication entitled *The Strategic Framework for the Approval of Major Events*, which was established in 2000.

According to the CEO of VMEC, a key tactic underpinning the success of this calendar is the diverse and flexible approach that attracts a range of events, bringing a variety of benefits to the State, including<sup>125</sup>:

- Significant economic impact benefits from interstate and international tourists;
- International media and branding exposure;
- Use of sporting and cultural venues and infrastructure;
- Industry development through expanded trade and investment opportunities;
- Sport and youth development;
- Community engagement, social and cultural benefits.

## Management and Sustainability of Major Events

There are three major phases to the Major Event Management Cycle in Victoria, which are:

**Pre-event Assessment** - the VMEC conducts preparatory research and lobbying for potential events, and prepares a submission to seek approval from the Major Events Cabinet Committee (MECC) to fund the event;

**Funding Management** - once funding has been approved, relevant government agencies contract manage events in accordance with agreements reached between the government and event organizers - which involves ensuring payments that are made to organizers are consistent with agreements; and

**Post-Event Assessment** - at the conclusion of an event, a post-event economic assessment is commissioned by the agency responsible for the event.

In 2006, the Government launched the *10 Year Tourism and Events Industry Strategy*, which reconfirmed the State's commitment to major events, and was recently audited by the Victorian Auditor-General's Office (VAGO). In the 2006-07 budget, the government announced that an additional \$50.4 Million would be allocated to major events over the next 4 years, for a total of approximately \$55 Million per year, which prompted the VAGO audit of the State's investment in major events.<sup>126</sup>

The VAGO audit concentrated on events funded from the major events "cap," which was established in 2000 to fund existing events and secure new events. They examined the soundness of the pre-event justification for chosen events, the adequacy of the management of funding agreements with event organizers, and the robustness of the post-event assessments outlining the level of economic value derived by Victoria. Two studies also assessed the economic value generated by the *2005 Australian Formula 1 Grand Prix*, including:

A cost-benefit analysis which estimated that costs could exceed benefits by between \$800,000 and \$13.2 Million, principally due to the uncertainty in measuring certain social benefits, however, according to the study's best estimate, costs exceeded benefits by \$6.7 million; and,

Computable general equilibrium modelling which, under the most likely scenario, estimated the increase in Victoria's gross state product to be \$62.4 million.

The VAGO audit generally determined that the 3 phases provided a sound foundation for assessing major event proposals, led to well-managed funding arrangements with event organizers, yet the post-event assessment could benefit from a triple bottom line approach to include social and environmental impacts, over and above economic impacts.

The audit confirmed that Victoria has been successful in attracting a wide range of major events, and that the success of the event calendar is based on the major event management cycle. With respect to best practices, this cycle provides an important model for MTOUR to consider for the major event industry in Ontario.

## NEW ZEALAND

### *National Events Strategy (2007)*

#### **Background & Overview of the Strategy**

Developing a strategy for investing in major events was identified as an important part of New Zealand's economic development and tourism strategies at a National level, but not until quite recently. A National Ministry of Tourism (TMT) was not formed until 2002, when it became part of the Ministry of Economic Development in order to implement the *New Zealand Tourism Strategy 2015*.

The TMT was also given the role of advising on the Government's involvement in major events and developing policy on major events, as well as assisting the Inter-Agency Events Group (IAEG) - made up of representative from 10 government agencies - to decide which events would receive support from the *Major Events Development Fund (MEDF)*. This fund was developed to support existing and proposed regional events that could contribute to New Zealand's development, and to support the bidding process for major international events.

Since 2002, several significant occurrences prompted New Zealand's Ministry of Tourism to develop a separate organization to specifically administer and organize the major events industry at a national level, including New Zealand's successful bid in 2005 to host the *2011 Rugby World Cup*. This organization, known as New Zealand Major Events, was developed as a unit within the Ministry of Tourism to both administer the *MEDF* and to develop a new *National Events Strategy*.

In 2006, New Zealand Major Events prepared a presentation outlining the *National Events Strategy* called: "Taking Our Place on the World Stage." This presentation included a bubble diagram to illustrate how the organization planned to develop the major events industry, demonstrated in Figure 1.



For each bubble, clear actions were described. Some of the key tactics from the *National Events Strategy* are described in further detail below:

- In order to continue support of the CINZ (Conventions & Incentives New Zealand), the Strategy recommends facilitating attraction of specific conferences aiming at supporting key industries, but not securing these conferences, recognizing that conferences and conventions are not considered major national events;
- To build Australasian partnerships, New Zealand Major Events would join forces with identified Australian Events agencies, and identify mutually beneficial events;
- To form synergies with New Zealand business agencies and organizations, NZME would create and share a calendar of events, and leverage business opportunities;
- To monitor events infrastructure and industry, the organization would create a database of relevant events infrastructure, and provide support when needed to build capability; and
- To build regional relationships, NZME would facilitate the development of separate regional event strategies and identify key events of national significance with the potential of becoming New Zealand iconic events.

#### **Identification of Major Events**

In conjunction with this Strategy, *New Zealand Major Events* created a website ([www.majorevents.govt.nz](http://www.majorevents.govt.nz)) that both defines and emphasizes the value of major events, in order to increase awareness and interest in the industry and the *Major Event Development Fund*. According to the website, the types of events that are considered for funding must:

- Be of a size requiring government agency involvement;
- Attract a large number of international participants or visitors and therefore generate significant tourism opportunities;
- Significantly raise New Zealand's profile;
- Require a high level of professional management and coordination;
- Attract large numbers of New Zealanders, either as participants or visitors; and,
- Offer considerable cultural, social, economic or other benefits.

Furthermore, New Zealand Major Events provides **support for events that are held off-shore**, however, they must produce the same high level of benefits for New Zealand. This is a best practice that has not been encountered in other comparable research. It shows that New Zealand has recognized the benefits of creating partnerships above and beyond the national scope, in order to counteract the country's isolation.

#### **Implementation, Impacts & Funding of Major Events**

In 2006-2007, the MEDF totalled NZ\$2.8 Million, and was distributed to 11 major events that in turn generated an economic impact of over NZ\$275 Million.<sup>127</sup> Examples of these major events are: The *New Zealand International Arts Festival* (annual), the *UCI Mountain Bike and Trial Championships* in Rotorua (2006), and the *A1GP World Cup of Motorsport* in Taupo (2007). The *UCI Mountain Bike* event generated over NZ\$20 Million alone to the national GDP, and received over 40,000 visitors.

As of 2008, the MEDF has been given a resource allocation of NZ\$4 Million, however part of this funding is allocation to CINZ to stimulate increased meeting & conference activity.<sup>128</sup> Nevertheless, the New Zealand Major Events team will not be in charge of attracting the events.

### **Performance Measurement**

In terms of performance measurement, New Zealand Major Events has identified that economic impacts cannot be assessed purely by visitor spending, and that many benefits are realized after the events have occurred. As such they assess the impacts of events based around their ability to achieve the following:

- A higher profile for New Zealand, which then allows the country to showcase products, develop connections and build business, cultural, sporting and tourism opportunities;
- A better quality of life for New Zealanders, through environmental and infrastructure improvements, increased employment opportunities before, during and after the event, and greater opportunities to participate;
- Building a stronger sense of identity in the community – locally, regionally, and nationally;
- Developing and promoting high achievement for New Zealanders in the arts, cultural, sports, heritage and leisure fields;
- Providing opportunities for New Zealanders to experience world class events; and,
- Enabling communities to showcase their regions and achievements nationally and internationally.

### **City-Driven Strategies for Major Events**

Before the country identified the need to develop a strategy for major events, the City of Auckland had established an organization called Auckland City Promotions (ACP), to form a *Strategic Implementation Plan: 1995-2000* and help to position Auckland as the "most desired destination in the South Pacific for events, conventions and tourism."<sup>129</sup> In a competitive evaluation with other New Zealand cities, Auckland was identified in 1993 as having the most experience with events (having hosted the *1990 Commonwealth Games*), a large population base (over 1 million), a variety of world-class venues (i.e., for yachting), numerous accommodations, and significant business sector support.

ACP developed ambitious strategies for prioritizing market segments, setting event industry standards, developing a portfolio of events, committing actions and expenditure to different types of events, and monitoring their performance. As of 1995, ACP's "market priorities" were related to the following:

- Sports and recreation events - bidding on world-class events;
- Conventions - bidding and winning targets;
- Mass culture events - funding specialist large niche events;
- Multicultural events - to foster integration;
- Arts events - targeting growth; and,
- Tourism Events - targeting growth.

ACP's Strategic Implementation Plan helped the City of Auckland to win the *America's Cup Defence* in 1999-2000 and host the *World's Yacht Race* every four years.

### **Programs and Policies to Support the National Events Strategy**

Creative New Zealand, the Arts Council for New Zealand, which supports local artists, one-off art projects and professional arts organizations in order to advocate the arts for all New Zealanders. Creative New Zealand offers grants for arts projects that focus on the development of New Zealand arts and artists, and are stand-alone arts activities/projects with a start and an end point, over a clearly defined period of time.



In 2007, their funding totalled NZ\$7.5 Million, which included one of the country's most prestigious major events - the *New Zealand International Arts Festival*.

Creative New Zealand recently released their *Strategic Plan and Statement of Intent 2008-11*, in which they outline the establishment of a new *International* team, whose role is to help New Zealand arts to gain international success. With respect to this priority, the organization plans to invest in "the distinct expressions of New Zealand's arts and culture at key international events and markets."<sup>130</sup> Māori and Pacific arts are seen as critical components of this strategic priority because their work is of considerable interest to many people overseas, as evidenced by the response to New Zealand work presented at key international arts markets, such as the *NZ International Arts Festival*. In order to assist New Zealand arts gain international success, Creative New Zealand has budgeted NZ\$1.97 Million in 2008 towards "investment in artists, practitioners and organizations to build their capacity, profile, relationships and work for overseas markets."<sup>131</sup> In 2008/09, they plan to complete a distinct international strategy that will include progress measures for the success of new events.

### **Case Study: Wellington - New Zealand Wine and Food Festival & New Zealand International Arts Festival**

Despite the fact that Auckland was identified as the most experienced city in New Zealand with regards to major events, the Capital City of Wellington has grown to include the most successful events in the country, by successfully marketing them as tourist attractions. With a population of about 180,000, the City of Wellington is home to most national theatre, dance and performance companies in New Zealand, as well as the national museum, archives and library. These events are the *New Zealand Wine and Food Festival*, and the *New Zealand International Arts Festival*.

The *Wine and Food Festival* was inspired in 1989 by visionaries from the hospitality industry, specifically for the capital city of New Zealand. The vision for the festival was to become a premier trade promotion vehicle for New Zealand wine producers, as other culinary-based festivals across the country only acted on a regional basis. It was also expected to incorporate arts and culture, with a tourism orientation. The Mission Statement for the festival was:

*To create a prestigious event celebrating New Zealand's finest food and wine, giving New Zealand producers the opportunity to market and sell their products to a symposium of international opinion leaders, buyers, and writers, here in New Zealand on Wellington's beautiful waterfront.*

Source: Getz, D. (1999) Event Management & Event Tourism. p. 153.

The Festival opened in 1991 as essentially a combination trade show, celebration and party that was open to the public, and generated revenue by ticketed sales. It won the *New Zealand Tourism Award* in both 1992 and 1993. By the third year, the Festival attracted 18,000 paying visits, up 140% from 7,500 in the first year, and 23% of attendees were from outside the city. Lessons learned by management over the years included developing a small, yet effective staff, and relying heavily on the assistance of volunteer workers - mainly because of the seasonal nature of the event. Furthermore, management was extremely conscious of creating the right ambiance, with a variety of entertainment, decor and design that offered a perception of quality; as well as maintaining a high quality of service with a customer focus.<sup>132</sup>

**The New Zealand International Arts Festival** has overtaken the *Wine and Food Festival* to become the largest and most successful cultural event in New Zealand. The Event has been held once every two years since 1986 in the capital city of Wellington. Part of its success is the involvement of public-private partnerships. This event is run through a dedicated organizational body, and receives funding from a variety of public and private sources. The Festival's budget generally is around NZ\$12.5 million of which the income is approximately 40% box office, 35% corporate sponsorship, 11% from the City of Wellington, 6% from Creative New Zealand (for NZ work only) and the *Major Events Development Fund*, 2% from foreign governments and their agencies and 6% from other income sources.<sup>133</sup>

The *2002 Festival* presented 350 ticketed performances, 22 seminars, 19 visual arts events, with approximately 1,300 artists from over 25 countries participating. More than NZ\$5 million worth of tickets were sold at the three-week *New Zealand International Arts Festival* in Wellington from mid-February to mid-March 2008. The *2008 Festival* involved more than 800 artists from 35 different countries, and the theme was human rights, globalization and environmental concerns.

## **FINLAND**

### ***Building a National Strategy for Major International Events (2007-2008)***

**Mission:** *To demonstrate that Finland is one of the world's best event organizers.*

#### **Background & Overview of the Strategy**

Within the Finnish Government, the Ministry of Education is responsible for developing educational, science, cultural, sport and youth policies, and international cooperation in these fields. In the Ministry of Education Strategy 2015, published in 2003, one of the Ministry's aims was to secure cultural equality for all Finns, by developing museums and supporting cultural events. The Ministry also recognized the need for enhancing the international visibility of Finland's culture and to increase knowledge of other cultures in Finland. The *Strategy 2015* sets out clear objectives in this area: to boost the educational, cultural and economic competitiveness of Finnish society; and to ensure Finland's influence in international contexts. It was out of these objectives that the need for hosting international events arose.

*In 2006, a committee associated with the Ministry of Education was formed to develop a proposal for a National Strategy for Major International Events in Finland. Major international events were defined as those with national significance that the State has good reasons to be involved, with positive and long-term effects - in the sectors of culture, sport and youth policy. The committee looked at the current state of Finland's major event market, and identified the importance of hosting international events for Finland's global positioning.*

A vision for the *Strategy* was created, to make Finland known as an "an active, modern, trustworthy and responsible organizer of major events."<sup>134</sup> Finland already had the economic base to host major international events and competitions in the areas of sport and culture, yet more uniform practices were needed for supporting the events. The committee suggested that new partnerships between the State, the event organizers and the City hosting the events would improve the current situation. Furthermore, common criteria for the application process were required, whether the major event was based in sport or culture. The Ministry of Education was chosen to be responsible for coordinating major international events, and a Steering Committee with officials from each sector (Sport, Culture and Youth Policy) was responsible for choosing and evaluating the long-term effects of each proposed event.

#### **Management and Sustainability of the Proposed Strategy**

The Ministry is currently in the process of compiling the policies for a full strategy. Once completed, one of the main goals of the Strategy will be to make detailed preparations during the planning phase of the application process.<sup>135</sup> New modes of support for events would include investment support for construction of infrastructure, such as performance venues, and guarantees to cover an event's risk of losses.

Sports events are to be developed first and foremost, as these constitute the prestigious competition the country is already renowned for. Existing annual events include: the *Levi Alpine Skiing World Cup qualifier*, *Ski-Jumping's World Cup qualifier*, and the *Lahti Ski Games*. Finland has the resources for hosting many types of events - the capital city of Helsinki was host to the 1952 *Summer Olympic Games* and the *World Athletics Championship* in 2005. The Greater Helsinki area has 1.3 million residents, and Helsinki is Finland's capital for business, education, research, culture, and government. The City offers eight universities and six technology parks, Helsinki Olympic Stadium, and a variety of museums,

galleries and theatres. Considering the fact that Helsinki houses much of the sport, culture, and tourism related infrastructure in Finland, another goal of the Strategy is to create effective public-private partnerships between the State, event organizers and hosting Cities. Advice for strategic planning is currently being sought at the municipal level.

### **City-Driven Strategies for Festivals & Events**

The Helsinki Tourist & Convention Bureau (HTCB) is responsible for marketing Helsinki as a tourist, congress and event destination nationally and internationally, in association with various organizations - including the Finnish Ministry of Education. The HTCB is fully owned by the City.<sup>136</sup> Nevertheless, HTCB does not have a dedicated event department. The inclusion of "events" in the City's tourism industry did not occur until 2000, when Helsinki was named one of the European *Capitals of Culture*.

The City hosted a variety of events during 2000 that led to increased media exposure, and as a result City organizers realized that events have a huge potential for attracting tourists. Preliminary planning for an event tourism strategy began at this time, with the realization that "events can be used to enhance the image of a destination and to gain positive publicity" and that events bring economic benefits through direct tourist spending.<sup>137</sup>

With respect to the *World Championships in Athletics* in 2005, the HTCB determined that the event displaced many regular tourists, as it was held during the busiest tourist season. Hence, one of the current roles of the HTCB is to finance events that are expected to "increase the attractiveness of Helsinki, especially during the low season."<sup>138</sup> For example, the *Light Event* in November-December is now used to market the city during the dark winter months.

In its goal to market the City as an active and energetic city in which many events are held throughout the year, the HTCB considers events as one of the city's strengths that contribute to the feeling that "there is always something happening in Helsinki."<sup>139</sup> Thus in Helsinki, the tourism organization is in charge of marketing the events in general, while the event organizers arrange their own media relations for specific events, but the organizers can share the HTCB's marketing channels to increase visibility for new tourist markets. The HTCB's website is considered one of the most effective marketing channels, as it includes an event database with a search engine. The problem is that since the City is in charge of providing financial aid, and does not take a committed interest in the events industry, HTCB cannot control the way the event funds are distributed and often event organizers take advantage of multiple resources.

Once the HTCB identified the need to introduce events into their long-term tourism planning, there were challenges due to lack of knowledge, resources and an undeveloped event industry, as major events were very rare in Helsinki prior to this time. It was determined that success in the event industry required a dedicated event office to coordinate all the events in Helsinki, to help event organizers and focus on both the success of existing events, and to develop new, quality events. Furthermore, a dedicated events office would be able to form a link between the City and the tourism organization, in order to better coordinate events, establish an events portfolio, and start bidding on more prestigious international events. It would also help to teach the City to understand the value of event tourism, as more commitment and better coordination would prevent event organizers from taking advantage of financial aid.

From these findings at the municipal level, the National Ministry of Education has taken upon itself the goal of creating a strategic plan for events, such that coordinated funding, knowledge sharing and other resources are properly implemented.

### **Case Study: World Athletics Championship 2005**

The Helsinki 2005 *World Championships in Athletics* was the largest global sports event in 2005. Helsinki hosted 3,000 athletes from over 200 countries, 3,500 media representatives, 3,000 volunteer staff; and a total of 400,000 spectators in Helsinki Olympic Stadium over the nine-day event.<sup>140</sup> Furthermore, TV broadcasts were transmitted to viewers in 180 countries around the world.

The management of environmental efforts and sustainable development in Finland has been in place since 1987. The country has been a leader in demonstrating sustainable development techniques, and event organizers recognized that hosting the *World Championships* offered a way to show the world for the first time that an environmental program can be incorporated into the hosting of a major international sporting event.

Thus, recognizing that the *World Athletics Championships* could easily place a heavy burden on local communities and the environment, discussions on the need for an environmental program began between the Helsinki University of Technology and the local organizing committee as soon as Helsinki was chosen as host in 2003. The organizers developed the *ECOmass Programme* to ensure that the *2005 World Championships* would become an eco-efficient mass event, demonstrating sustainable patterns of consumption and service provision. The planning and implementation schedule for the championships was short, as the host city had to be reselected, after London pulled out, having been originally selected as host. The short planning phase also limited the scope of the program, such that it became focused on those environmental effects that could still be influenced during the planning phase. As a result, permanent building had to be left outside the program.

The procedures and the estimation of the effects of the environmental program concentrated on<sup>141</sup>:

- Climate Calculator
- Traffic and logistics
- Constructions, energy and water consumption
- Eco-efficiency and recycling
- Training and communications

These sectors were also selected because by concentrating on them, it was possible to simultaneously reduce the environmental burden and cut costs. The entire program was carried out over a period of two years.

Partnerships to fund and support the *ECOmass programme* included:

- Helsinki University of Technology (Co-ordinator of the ECOmass LIFE Environment project)
- Finnish Athletics Association
- Helsinki 2005 Local Organizing Committee
- City of Helsinki
- City of Espoo
- City of Vantaa
- Helsinki Metropolitan Area Council
- Motiva Ltd
- WWF Finland
- The Stadium Foundation
- The Finnish Ministry of Environment

These partners realized that environmental impacts of mass events are mainly related to construction, transportation and waste. Hence, the aim at *Helsinki 2005* was to work together to demonstrate a practical example of an eco-efficient mass event with reduced environmental impacts. Following the events, an Eco-Efficient Mass Event Manual was developed for future organizing committees to use when organizing events.

## **QUEBEC**

### **Background**

At this time, the primary objective of the Québec Ministry of Tourism is to increase tourism revenues to \$13 Billion by 2010. To this end, the Province recognizes the importance of its major festivals and events sector in order to:

- Position Québec nationally and internationally;
- Enhance the attractiveness of a region or municipality associated with a festival or event;
- Prolong visitor stays;
- Encourage rotation and innovation to ensure the sustainability of industry events;
- Maintain the position and competitive advantages of Québec in this sector; and,
- Support non-recurring events that present an opportunity to increase the awareness and visibility of Québec because of their international status.<sup>142</sup>

### **Management and Implementation of Festivals and Events**

The two primary organizations involved in the festival and events industry in Québec are:

- Festivals et Événements Québec (FEQ); and,
- Regroupement des événements majeurs internationaux (REMI)

### **Festivals et Événements Québec (FEQ)**

Festivals et Événements Québec was established in 1975 as a non-profit organization with 190 members representing fairs, festivals and events throughout the province of Québec. FEQ is part of a strategic administrative association with the Société des Attractions Touristiques du Québec (SATQ).

The mission of the organization is to bring together the fairs, festivals and events in Québec, promote them, and provide services to further their development, based on the following strategic goals:

- Increase patronage of festivals and events;
- Increase accessibility to information and promote networking;
- Protect the interest of the members and representation of the sector;
- Insure the quality of festivals and events;
- Possess a good knowledge of the realities of the sector; and
- Ensure development of the two associations.

As part of its mandate, the organization provides the following services<sup>143</sup>:

#### **1. Research**

FEQ has developed measurement tools, produced reports and undertaken studies on behalf of its membership, including: two Léger Marketing studies on the summer vacation habits of Québécois, various profiles of Québec tourists, a study of member satisfaction, as well as an administrative profile of the members of Festivals et Événements Québec.

#### **2. Training**

In collaboration with the Québécois des ressources humaines (CQRHT), has developed a series of four event management training manuals for its members, which focus on creating and scheduling an event, support services, advertising and marketing, and the show and celebration.

In partnership with Organifest, FEQ has also produced a Business Plan template for its members to develop a new product or new activity.

### 3. Quality Certification

FEQ has collaborated with industry to create a Quality certification for the tourist attractions and events sector.

### 4. Tourist Promotion

All the members of Festivals et Événements Québec are part of an event listing by regions in the *Winter and Summer Québec Vacation Guides*. In addition, the *Event Organizer* provides a directory of service suppliers and different activity ideas, geared towards event planners and the group tour market. FEQ also maintains its own website which attracts an estimated 150,000 visitors per year.

#### **Regroupement des événements majeurs internationaux (REMI)**

REMI is an association of 20 of Québec's largest events, which work to bring major cultural, sporting and recreational events to the province. In order to be a member, an event must meet the following criteria:

- Be annual;
- Take place in Québec;
- Be considered a "festive event", lasting between 3 to 36 days;
- Receive 25,000 audience members (if tickets are sold); or 200,000 visitors (if the site is open), over the past two years;
- Have an audience of which 15% were tourists or excursionists over the past two years; and,
- Have a budget of at least \$1 Million over the last two years.

This is the same definition of a "major international event" utilized by the FEQ.

#### **Identification of Major Events: REMI Members**

REMI currently has seven members from Montreal, four from Québec City and nine from other Québec Regions, each of which are described in the following table:

<b>TABLE 1</b>				
<b>Regroupement des événements majeurs internationaux (REMI)</b>				
<b>2008-2009</b>				
<b>REMI EVENT</b>	<b>Date</b>	<b>Type</b>	<b>Attendance/Economic Impact</b>	
1 <b>La Féria du vélo de Montréal</b> <ul style="list-style-type: none"><li>• Operating 10 years</li></ul>	May 25-Jun 1, 2008	Sport	30,000 participants	
2 <b>L'International des Feux Loto-Québec présenté par Telus</b> <ul style="list-style-type: none"><li>• Operating 24 years</li><li>• Int'l Fireworks competition</li></ul>	Jun 21–Aug 6, 2008	Thematic Festival	Average 2.3 Million	
3 <b>Festival d'été de Tremblant</b> <ul style="list-style-type: none"><li>• Tremblant Film Festival – 3<sup>rd</sup> year</li><li>• Int'l Blues Festival – 15<sup>th</sup> year</li><li>• Les Rythmes Tremblant – 7 weekends of live concerts</li><li>• Un Programme D'Animation Quotidien</li><li>• La Feerie Musicale de Tremblant</li></ul>	Jun 23–Sept 1, 2008	Arts Festival	Int'l Blues Festival – 100,000 attendees	
4 <b>Festival International de Jazz de Montréal</b> <ul style="list-style-type: none"><li>• 29<sup>th</sup> year of operation</li><li>• 3,000 artists from 30 countries</li><li>• 650 concerts including 450 free outdoor performances</li></ul>	Jun 26 – July 6, 2008	Arts Festival	2.5 Million visitors 34% tourists and excursionists	
5 <b>Mondial des Cultures de Drummondville (World Festival of Culture)</b>	July 3-13, 2008	Arts Festival	310,000 visitors and 30,000 artists	

	<ul style="list-style-type: none"> <li>• 27<sup>th</sup> year of operation</li> <li>• \$2.5 M operating budget</li> <li>• Primary mission is to bring together artists from around the world.</li> <li>• 90 countries have been represented through 370 different companies</li> </ul>			
6	<b>Régates Molson Dry de Valleyfield</b> <ul style="list-style-type: none"> <li>• 70<sup>th</sup> year of operation</li> <li>• High performance boating</li> </ul>	July 4 – 6, 2008	Sport	150,000 attendees
7	<b>Festival d'été de Québec</b> <ul style="list-style-type: none"> <li>• 41<sup>st</sup> year of operation</li> <li>• Québec City Summer Festival</li> </ul>	July 3-13, 2008	Arts Festival	900,000 visitors
8	<b>Festival de Lanaudière</b> <ul style="list-style-type: none"> <li>• 30 years of operation</li> <li>• Classical music festival, featuring 26 concerts in 2008</li> <li>• Built outdoor amphitheatre in 1989</li> </ul>	July 5 – Aug 3, 2008	Arts Festival	50,000 - 60,000 visitors
9	<b>Festival Juste pour rire</b> <ul style="list-style-type: none"> <li>• 25<sup>th</sup> year of operation</li> <li>• Started in Montreal - now in France, Toronto, and Bermuda</li> </ul>	July 10 – 20, 2008	Thematic Festival	2 Million visitors
10	<b>Les Grands Feux Loto-Québec</b> <ul style="list-style-type: none"> <li>• 14<sup>th</sup> year of operation</li> <li>• Pyromusical event</li> </ul>	July 19 – Aug 6, 2008	Thematic Festival	104,090 on site (2007) 217,500 off site 39% tourists, \$11.3 Million in economic impacts
11	<b>Les FrancoFolies de Montréal</b> <ul style="list-style-type: none"> <li>• 20<sup>th</sup> year of operation</li> <li>• Promoting French-language music</li> <li>• 250 performances including 180 free outdoor performances</li> <li>• 7 outdoor stages</li> </ul>	July 24 – Aug 3, 2008	Arts Festival	800,000 visitors
12	<b>Divers/Cité</b> <ul style="list-style-type: none"> <li>• Operating 16 years</li> <li>• A GLBT music and arts festival, celebrating the value of diversity</li> </ul>	July 29 – Aug 3, 2008	Thematic and Multi-Art Festival	134,958 (2007) 29% tourists \$10.5 M Economic Impact
13	<b>Les Fêtes de la Nouvelle-France SAQ</b> <ul style="list-style-type: none"> <li>• 12<sup>th</sup> year of operation</li> <li>• SAQ New France Festival</li> <li>• An historic festival inspired by the lives of the first European settlers</li> <li>• Featured 400<sup>th</sup> Anniversary celebrations in 2008</li> </ul>	Aug 5 -10, 2008	Thematic Festival	4.5 Million visitors
14	<b>La Coupe Rogers</b> <ul style="list-style-type: none"> <li>• 127<sup>th</sup> year of competition</li> </ul>	July 26 – Aug 3, 2008	Sport	182,252 (2007)
15	<b>International de montgolfières de Saint-Jean-sur-Richelieu</b> <ul style="list-style-type: none"> <li>• 25<sup>th</sup> year of operation</li> <li>• 115 hot air balloons</li> <li>• Hosted the North-American championships, the Canadian championships, and the 10th hot air balloon world championship; an</li> </ul>	Aug 9 – 17, 2008	Thematic Festival and Sport	350,000 visitors

	international competition presented for the first time in Canada, featuring the 100 best balloonists in the world, from 30 countries, this was in 1991.			
16	<b>Festival de montgolfières de Gatineau</b> <ul style="list-style-type: none"> <li>• 20<sup>th</sup> year of operation</li> <li>• Gatineau Hot Air Balloon Festival</li> <li>• 5<sup>th</sup> largest in world</li> </ul>	Aug 29 – Sept 1, 2008	Thematic Festival and Sport	200,000 visitors
17	<b>Festival Western de St-Tite</b> <ol style="list-style-type: none"> <li>1. Operating 40 years</li> <li>2. Western Rodeo</li> <li>3. \$2.5 Million operating budget</li> </ol>	Sept 5 – 14, 2008	Thematic Festival and Sport	400,000 visitors
18	<b>Carnaval de Québec M. Christie</b> <ul style="list-style-type: none"> <li>• Operating for 54 years</li> <li>• Largest winter festival in the world</li> <li>• \$8.9 M operating budget</li> </ul>	Jan 30 – Feb 15, 2009 17 days	Thematic Festival	500,000 visitors 47% of visitation outside Québec Region \$48 Million economic impact
19	<b>Festival MONTRÉAL EN LUMIÈRE</b> <ol style="list-style-type: none"> <li>1. 10<sup>th</sup> year of operation</li> <li>2. A midwinter Montreal Highlights Festival</li> <li>3. Festival organizers send out 1,000+ invitations to participate in the culture, gastronomy and urban entertainment programming.</li> </ol>	Feb 19 – Mar 1, 2009	Multi-Art Festival	
20	<b>Challenge sur glace Continental - Sherbrooke</b> <ul style="list-style-type: none"> <li>• 10<sup>th</sup> operating year</li> <li>• Motor sports on ice event</li> </ul>	Feb 27 – Mar 1, 2009	Sport	330,000 visitors since 1999

Of the 20 members of REMI, the events have been in operation ranging from 3 to 127 years. Excluding the newest and longest running event, the average REMI event has been in operation for 26 years. Three of the events are major international sporting competitions, while a further three combine sporting competitions with a festival, and the remaining 14 events are festivals, mostly centred on music and the arts.

#### **Policies, Programs and Funding to Support Major Events**

Festivals and sporting events in the Province of Québec typically utilize one or more of following seven government sources for funding purposes, as described in Table 2.<sup>144</sup>



**TABLE 2**  
**FUNDING SOURCES for Québec's Festivals and Sporting Events**

<b>Department of Canadian Heritage</b>	<p>Heritage Canada primarily supports festivals through two programs:</p> <ul style="list-style-type: none"> <li>▪ Arts Presentation Canada (APC)</li> <li>▪ Canadian Arts and Heritage Sustainability Program (CAHSP)</li> </ul> <p>Through its funding programs, Canadian Heritage focuses on:</p> <ul style="list-style-type: none"> <li>▪ Emerging festivals related to innovative forms of expression;</li> <li>▪ Regional artistic festivals; and</li> <li>▪ Cultural community diversity.</li> </ul> <p>Canadian Heritage also supports major international events such as the International Jazz Festival, the Francophonies, and the Just for Laughs Comedy Festival in Montreal. During the fiscal year 2003/04, PCH contributed an estimated \$6.5 Million in funding to Québec festivals through its Arts Presentation Canada program.</p>
<b>Canadian Economic Development for Québec Regions (CED)</b>	<p>The Canadian Economic Development for Québec Regions is one of the main federal financial supports in the F&amp;SE sector in Québec.</p> <p>CED funding is provided to support F&amp;SEs in their international marketing efforts in order to stimulate growth in both the number of international tourists and associated revenues generated for regional economies in Québec.</p> <p>Based on the 2005 study completed by CED in co-operation with Canadian Heritage, between the seven-year fiscal period from 1997/98 to 2004/05, CED granted \$41 Million to Festivals and Sporting Events in Québec, with \$32 Million to festivals and \$9 Million to sporting events. This equates to an average of \$5.75 Million per year to 20 events. Nearly one-half of the CED assistance provided over the seven-year period was for events in Montreal and Québec City, because these events were larger in scope in relation to other events and have the ability to attract the international tourist market. In fact, seven events accounted for nearly 60% of the total contributions provided by CED – indicating a high concentration of assistance for a few major events.</p>
<b>Québec Department of Municipal Affairs, Sport and Recreation (MAMSL)</b>	<p>MAMSL provides F&amp;SE funding from an economic, cultural and social development perspective, on a three-year basis. Support is provided for two categories of events:</p> <ul style="list-style-type: none"> <li>▪ Key events (Grand Prix, Just for Laughs, etc.)</li> <li>▪ Niche events (design, electronic music, the gay and lesbian market).</li> </ul> <p>Support is only provided on a partnership basis with other federal departments or municipalities. MAMSL does not provide operational support. Each case is reviewed individually according to various criteria, including:</p> <ul style="list-style-type: none"> <li>▪ Ability to attract external audiences</li> <li>▪ Media spinoff</li> <li>▪ Complementarily with other festivals</li> <li>▪ Financial self-sufficiency</li> <li>▪ Partnerships with national and international sectors</li> <li>▪ Job maintenance and creation</li> <li>▪ Strengthening of destination and social image</li> <li>▪ Quality of life in the community</li> </ul>
<b>Tourisme Québec</b>	<p>Tourisme Québec is the largest contributor to the F&amp;SE sector in Québec. Tourisme Québec has an economic and regional mandate. F&amp;SE are seen as important because they contribute to improving and diversifying the tourism offer, and extend the tourism season. Tourisme Québec offers direct support to reoccurring and non-recurring events in the following areas:</p> <ul style="list-style-type: none"> <li>▪ Event planning;</li> <li>▪ Organization and marketing activities;</li> <li>▪ Staging of the event itself;</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Organization's operations;</li> <li>▪ International marketing.</li> </ul> <p>The event must be held over a minimum of three days to receive support. Government contributions to the events it supports must not exceed 40% of the total cost of the event, with the maximum Tourisme Québec contribution at \$1 Million.</p> <p>For reoccurring events, the event must be held for two consecutive editions before being eligible for financial aid, with fairs, tourist exchanges, exhibitions, conferences and shows excluded from festivals and events funding.</p> <p>Tourisme Québec underwent a strategic repositioning exercise in 2005. While Tourisme Québec continues to support F&amp;SEs, it now focuses on large events that are well established, viable and profitable, and attract a significant number of tourists from outside Québec, while retaining customers in Québec with other cultural partners, assuming responsibility for the development of <i>emerging events</i> until they reach a minimum size. For events with an operating budget of over \$1 Million or more, an economic impact study must be produced every three years by an independent firm according to a methodology recognized by the Ministry of Tourism, and must demonstrate tourist traffic in accordance with the requirements of the Ministry.</p>
<b>Fonds de Stabilisation et de consolidation des arts et de la culture due Québec (FSCACQ)</b>	<p>Developed in 1999 as a non-profit organization, FSCACQ principle objectives are:</p> <ul style="list-style-type: none"> <li>▪ To promote the development of, and increase the funds available for arts and culture in Québec;</li> <li>▪ To contribute to the financial stability of organizations working in the arts and culture sector in order to help them seek out new revenue sources, particularly in the private sector.</li> </ul> <p>Supports innovated projects that have an impact on the arts and culture economy and the international development of arts organizations.</p>
<b>Tourisme Montréal</b>	<p>A destination marketing organization promoting Montreal and its tourism development and product orientation. The organization devotes approximately 10% of its promotional activities to major events. Tourism Montreal also funds small, avant-garde events with tourism potential, for example the Electronic Music Festival.</p> <p>In 2007, Tourisme Montréal allocated \$1.6 Million of its \$19 M sales, promotion and advertising budget to Event support.</p>
<b>Greater Québec City Area Tourism and Convention Bureau</b>	<p>A destination marketing organization for Québec City, which provides assistance for promotional and marketing activities related to festivals and sporting events, and occasionally offers operational support.</p>

Other funding sources also include: the Québec Department of Municipal Affairs and the Regions (MAMSL), Québec Arts Council (CALQ) and the Cultural Enterprises Development Society (SODEC).

Based on the review of 155 events which received funding over the seven-year fiscal period (1994/95 to 2004/05), one-half of the government contributions to festivals and sporting events held in Québec came from the Provincial Government (50%), compared with 35% from the Federal Government and 8% from the municipal level, with the remaining 8% coming from other sources.

The review concluded that funding programs provided by Canadian Economic Development for Québec Regions (CED), complements Canadian Heritage and the main provincial government partners' funding activities involved in the Festival and Sporting Events sector, especially in targeting the international tourist market.

## Performance Measurement & Impacts of Major International Events

The following table summarizes the impact generated by funding 19 REMI events in 2001 and 18 events in 2004.

	2001	2004	Growth
# REMI Events	19	18	
Federal Funding	\$18 Million	\$18 Million	
<b>Impacts</b>			
Jobs	5,607	7,698	37%
GDP	\$203 M	\$293 M	44%
Federal Taxes	\$34 M	\$44 M	31%
Provincial Taxes	\$47 M	\$64 M	36%
ROI	\$1 to \$1.88 M	\$1 to \$2.44 M	

Sources: 2001 KPMG Studies, 2004; REMI data made available to CED

Of the 18 major international events held in 2004, all of which were members of the REMI organization, \$18 Million in federal funding resulted in:

- an estimated 7,700 jobs, an increase of 37% over 2001;
- \$293 Million in GDP, an increase of 44% over 2001;
- Federal tax revenue of \$44 Million, 31% more than 2001; and
- Provincial tax revenue of \$64 Million, an increase of 36% over 2001.

According to the study results, **for every dollar invested by the Federal Government in major international events in Québec, between \$2 to \$2.50 was generated in federal tax revenues due to tourist spending.**

While the ability to attract tourists is a key factor in developing Québec's festivals and events sector, there is a certain fear among event organizers of limiting festivals and sporting events to performance indicators, over which they have little control. Other factors of importance include:

- Social cohesion, pride, increased sense of belonging; diversity, tolerance and the bridging of different cultures;
- Reach and positive branding: development of a vibrant and creative community image; and,
- Impacts relating to education and opening up to the world.

The Québec Department of Municipal Affairs, Sport and Recreation, which had originally adopted a quantitative approach to its funding of events based on economic returns, currently uses an indicator similar to the *Bohemian Index* to measure the level of tourist attraction with the context of the international mobility of the creative class. The *Bohemian Index* measures the size of the community's creative community, and is based on the premise that the economic growth of a city or region is no longer dependent on its natural resources, infrastructure or the number of head offices of large companies, but rather on the presence of a creative class of individuals.

### **Policies, Programs and Funding to Support Major Events**

Between 1997 and 2005, Canada Economic Development allocated an average of \$5 Million per year on the funding of festivals and sporting events in Québec, which has recently been increased to \$7 Million per year. The increase in the budget will enable the Agency to continue funding those events, which they have funded in the past, and which have achieved the anticipated results or remain in need of assistance. At the same time, it will provide the Agency with the ability to support national marketing (outside Québec) of festivals and sporting events that are being held in Québécois regions other than Montreal, Québec City and Gatineau. The increase will also fund new strategic or innovative initiatives for the renewal of recurrent festivals and sports events, which show strong potential for national or international reach.<sup>145</sup>

**Case Study : A Multi-Regional Event (Les Fêtes du Québec Maritime)**

The *Fêtes du Québec Maritime* is an example of an interregional event, which was created as a development project to extend the beginning of the tourist season.<sup>146</sup> The event was designed to bring together five tourist regions: the Bas-Saint-Laurent, Gaspésie and îles de la Madeleine regions, and the Manicouagan and Duplessis regions of the North Shore.

Up until 2002, when the *Fêtes* became an independent corporation, the Québec Maritime Corporation, a not-for-profit organization formed in 2000, organized the events. The corporation had a mandate to promote the tourism products of these five regions to international markets, through a regional product strategy based on selection of thematic tour packages and getaways connected by land, sea and air transportation links.

With a mandate to extend the tourist season, the 2004 *Fêtes du Québec Maritime* event was held from June 18 to July 4<sup>th</sup>. The *Fêtes* took place in 65 towns and municipalities in the five tourist regions and centered on various “celebration of the sea” themes. The 2004 event comprised an estimated 200+ free and admission based activities including: gastronomy and local produce, marine activities and the observation of marine animals, artistic and cultural activities (visual arts, music, crafts, storytelling, etc.), a sailboat race and several port symphonies. The idea behind the festival was to bring together a large number of existing activities in the participating regions, marketing them under the same promotional umbrella.

According to the corporation, the *Fêtes du Québec Maritime* attracted 80,000 visitors in 2004, of which 29% were tourists from outside the region. However, visitation to the 2004 event was down considerably from previous years, which recorded 88,560 visitors in 2002 and 88,680 in 2003.

Based on interviews with regional tourism stakeholders and government partners, most were not satisfied with the quality of the regional event offer, in terms of the development of a large-scale tourist event, claiming that a “value-added offer” had not been achieved.

As illustrated in Table 4, attendance varied considerably between the participating regions, with Manicouagan accounting for two-thirds of the total attendance and spending. However, despite the fact that the number of activities and infrastructure (rooms and campsites) was higher in the Bas-Saint-Laurent and Gaspésie Regions, these regions only received 14% and 9% of the visitation, respectively.

	<b>Iles de la Madeleine</b>	<b>Bas-Saint-Laurent</b>	<b>Duplessis</b>	<b>Manicouagan</b>	<b>Gaspésie</b>	<b>TOTAL</b>
<b># of activities</b>	14	37	11	40	81	<b>183</b>
<b>Tourists</b>	800	2,733	1,449	15,890	2,637	<b>23,509</b>
<b>Locals</b>	3,200	8,197	3,546	37,075	4,898	<b>56,916</b>
<b>Total Attendance</b>	4,000	10,930	4,995	52,965	7,535	<b>80,425</b>
<b>Tourist Spending</b>	\$104,000	\$355,000	\$188,000	\$2,066,000	\$343,000	<b>\$3,056,000</b>
<b>Local Spending</b>	\$160,000	\$410,000	\$177,000	\$1,854,000	\$245,000	<b>\$2,846,000</b>
<b>Total Spending</b>	\$264,000	\$765,000	\$365,000	\$3,920,000	\$588,000	<b>\$5,902,000</b>
<b>Avl Rooms (2003)</b>	295	2,197	977	1,265	2,719	<b>7,444</b>
<b>Avl campsites (2003)</b>	688	3,067	868	1,277	6,026	<b>11,915</b>

Sources: Corporations des Fêtes Maritimes, EEC, and Tourisme Québec

Furthermore, each of the regions did not share the same commitment to international promotion/marketing, and there was not a consensus regarding the extension of the tourist season, with the Magdalen Islands preferring to extend the season at the end of the summer, rather than the beginning.

### **Regional and City-Driven Strategies for Festivals and Events**

Based on the 2004 Canada Economic Development (CED) review<sup>147</sup>, the *Fêtes du Québec Maritime* illustrates how a number of small-scale activities, even though they may have a unifying concept, are unable to play a significant role in attracting tourists. The study concluded that while the overall event may include a wide range of activities, if these activities are scattered, government support for the event might only provide an ineffective sprinkling of resources. The challenge is to equally satisfy all of the participating regions, however, the number of large-scale activities than can be organized is limited to a few cities.

The study concluded that spreading government resources over a large number of events tends to have a “watering down” effect, which hinders excellence and curbs the development of events with a real growth potential for communities and regional economies. Furthermore, the study recommended that federal funding for an event should only be given to those regions that also show tangible evidence of commitment and support of the event at the regional level itself.

### **City-Driven Strategies regarding Sport Tourism**

With regards to the sport sector, there is an organization set up in Montreal, dedicated to support major sport events. Similar to UK Sport, Internationaux du Sport Montréal works directly with event organizers to attract and support professional international sporting events that will enhance Montreal's international sport profile. This organization is also instrumental in enhancing existing infrastructure and encouraging new development in Montreal to accommodate these events.

Although it does not directly fund major sport events, Internationaux du Sport Montréal receives funding from all three levels of government in order to provide support for these events. This support includes research, logistical and organizational planning, volunteer coordination, and private sector stakeholder arrangements.

### **Case Study: The Big Six International Festivals in Montreal**

Within the Canadian marketplace, Montreal is known as a *City of Festivals*. Based on historical attendance data provided by *Tourisme Montréal*, Figure 2 depicts the growth in attendance at six of Montreal's top international festivals over the 1988 to 2006 period.

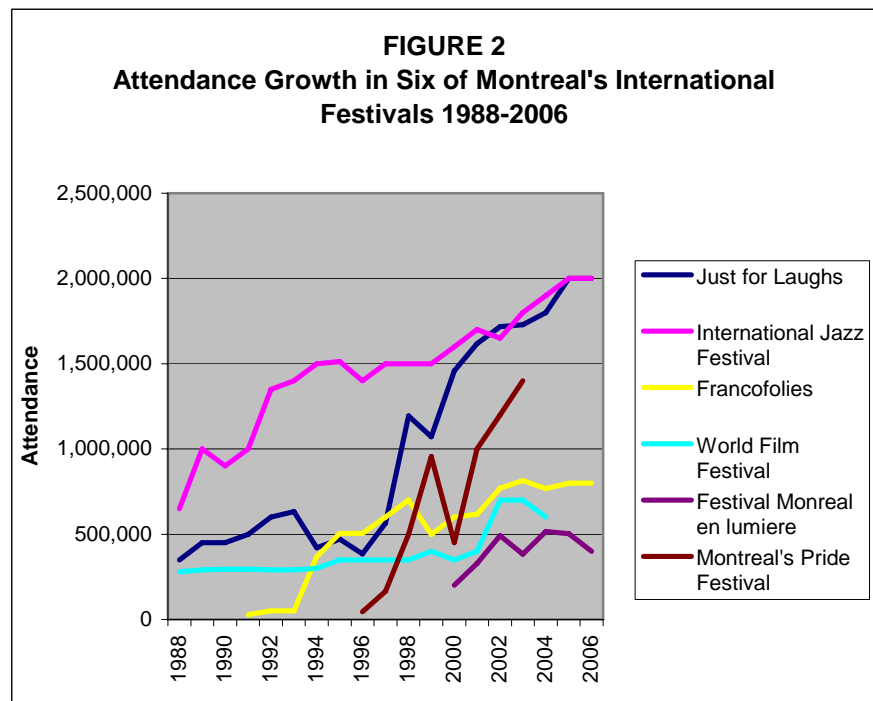
During its first ten years of operation, the Just for Laughs Festival grew from 350,000 attendees to 565,000 by 1997, with attendance doubling in 1998 to reach 1.2 Million and for the past 10 years, attendance has steadily increased to reach 2 Million by 2005.

During the same period, the International Jazz Festival grew from 650,000 attendees in 1988 to 1 Million visitors the following year. Visitation stabilized at approximately 1.5 Million over the first ten years, and since then has steadily increased to 2 Million by 2006.

Since 1991, the Francolies Festival has undergone an annual compound growth rate of 23%, increasing from 28,000 visitors during its first year of operation, to reach 800,000 by 2005.

During the past 18 years, the World Film Festival has doubled its attendance, from 280,000 in 1988 to 600,000 recorded in 2004, representing an annual compound growth rate of 4.6%. Similarly, the Festival Montreal en lumiere, which began in 2000 with an attendance of 200,000, more than doubled it attendance by its 3<sup>rd</sup> year of operation.

Lastly, Montreal's Pride Festival has undergone significant growth since its inception in 1996. The event attracted 45,000 visitors during its first year of operation, reaching 500,000 by its 3<sup>rd</sup> year, and just under 1 Million by its 4<sup>th</sup> year. While attendance reverted back to 450,000 in 2000, the event has since grown to attract 1.4 Million visitors by 2003.



The growth in attendance at Montreal's major international festivals clearly demonstrates the importance that the City of Montreal places on this tourism sector as a means to enhance its international image as a tourist destination.

### Commemorative Events: Québec's 400<sup>th</sup> Anniversary Celebrations

January 1, 2008 marked the beginning of the 400<sup>th</sup> anniversary celebrations in Québec City, which have extended over 10 months to October 2008. In preparation for the events, various levels of government funded over \$75 Million in infrastructure projects, as follows:

- Defence Construction Canada allocated \$9 Million towards 30 restoration projects at Québec City's La Citadelle;
- A total of \$19.3 Million was invested by Canada Economic Development in Baie de Beauport, to restore existing facilities and redevelop the site for new types of activities, including the renovation of a 3,500 seat outdoor performance venue;
- An investment of \$16.4 Million by Canada Economic Development to Pointe-à-Carcy, located in the Port of Québec, to restore the outdoor performance venue, extend the promenade and upgrade the reception area for cruise ships;
- A further \$7.1 Million by Canada Economic Development to restore the historic Bassin Brown site, which is linked to Québec City's port;
- A total of \$24 Million invested by Parks Canada in the Espace 400e, the main site for the anniversary celebrations. The project included restoring the existing building and establishing a new administrative centre to house the Société du 400e.

In terms of programming, Canada Heritage contributed \$40 Million in support of the commemorative programming. Through Canada Heritage, the federal government worked together with the City of Québec and the Province of Québec to provide funding to the Société du 400e anniversaire de Québec for the celebrations. The Société du 400e is an independent, non-profit organization, which was mandated by the City to plan, coordinate and produce the 2008 festivities.

Event organizers indicate that the Québec Convention Centre will host 70 conventions in 2008, of which 30 conventions decided to host their event in Québec because of the 2008 celebrations. Of the 5.5 Million visitors expected to visit Québec City in 2008, event organizers project that 270,100 tourists will visit Québec because of its 400<sup>th</sup> anniversary. The Bureau de la Capitale nationale is currently working on an impact study of the 400<sup>th</sup> Celebrations, however they are only at the early stages of collecting data.

## **NOVA SCOTIA**

### **Background - Developing a Strategy for Festivals & Events**

The Nova Scotia Department of Tourism and Culture and the Federal Department of Industry, Science and Technology retained the Economic Planning Group (EPG) to undertake a *Product Market Matching Study* in 1989<sup>148</sup>, with Festivals and Special Events identified as one of the 10 product opportunities for the Province. The study concluded that there was a relatively small market of tourists who travel “specifically to attend a special event or festival”, however; there was a significant market for people who attend festivals and events “as an incidental activity on a more broadly based trip.” The study identified Nova Scotia as having “unique aspects of history and culture that were well suited for developing festivals and special events. Still, the study noted that few of the events and festivals taking place in the province each year have the ability to attract “a significant tourist market”, as the consumer research revealed that the quality and size, “as well as the personal significance” of the event are important factors to potential visitors.

In 1994, the Nova Scotia Department of Tourism and Culture retained The Randolph Group in association with Corporate Research Associates Inc., Solution Finders Inc., and Waterfront Festivals Ltd. to prepare a comprehensive strategy for its events sector, entitled “*Festivals and Events in Nova Scotia: A Development Strategy for the '90's: Technical Report.*”<sup>149</sup> The study provided: a situational analysis; primary market research; events analysis; education/training needs assessment; identification of opportunities, strategy formulation, and an action plan.

### **Identification of Major Events**

The situational analysis included a profile of the province’s festivals and events sector (350 events); nine, detailed event case studies; interviews with event organizers and tourist operators. The situational analysis concluded that while Nova Scotia’s events were seen as being nationally and internationally competitive, the organizers needed more knowledge on management, operations, revenue generation, motivating and training volunteers, marketing, and issues of liability, safety, and health. Based on on-site surveys at nine events and questions on an omnibus consumer survey, it was found that:

- Events with unique appeal, larger scale or scope, and locations accessible to population concentrations had higher attendance and a wider market reach; and,
- Advertising had a strong impact on attendance levels, with product quality influencing word of mouth recommendations.

The study identified the following product gaps:

- Need for a provincial flagship or hallmark event;
- Need for off-season events; and
- Geographic gaps in the distribution of events.

It was recommended that upgrading initiatives be undertaken for the following three types of events:

- Uniquely themed community festivals (those with strong appeal and good organization base; interested in expanding);
- Existing festivals at a mature stage (needing rejuvenation; where minor changes could have a major impact; overall image should be expanded with programming changes); and,
- Successful one-day events with potential (develop programming; could break theme into subcomponents).

It was recommended that any new events be oriented towards the following three areas:

- Additional shoulder season events, to help extend the tourist season;
- Off-season events (unique seasonal and heritage events; help enhance the meetings and convention segment); and,
- A possible new flagship event (preferably in shoulder season, 10 days to 2 weeks in length, with many components).

### **Management and Sustainability**

The development strategy put forth by the Randolph study recommended that the Provincial Government take a facilitator role in developing the flagship/hallmark event through seed money. The study also outlined three goals and five objectives to meet these goals:

#### **Goals**

- To reinforce the positioning of Nova Scotia's tourism experience as a touring vacation with strong opportunities to experience Nova Scotia people, special places, and unique indigenous culture through hundreds of annually scheduled festivals and events.
- To maximize the contribution of festivals/events to Nova Scotia's tourism sector in terms of enhancing the visitor quality of experiences and extended length of stay to the province.
- To increase the economic and community development impacts of festivals and events province-wide.

#### **Objectives**

- Reduce or eliminate dependence on Nova Scotia's festivals and events on government grants, putting them on a more self-sustaining, business-oriented basis.
- Focus government support to festivals/events on facilitation, training/education, and other technical assistance.
- Systematically provide ongoing training/education and networking opportunities to festivals/events organizers targeted to specific needs, which will enhance professionalism within the sector and improve product quality.
- Upgrade product quality of festivals/events and their organization/management, programming, and operations to enhance customer satisfaction, visitor draw, and economic impacts.
- Achieve broader co-operative marketing/promotion of Nova Scotia's festivals/events both within the province and outside it.



### **Revised Approach to Identifying and Marketing Festivals and Events**

In January 2003, a Festivals & Events Marketing Task Force was established to address marketing issues as they relate to festivals and events. The mandate of the Task Force was to undertake the best marketing activities allowable by the amount of dollars available. The Task Force was a joint effort between the Festivals and Events Committee of Tourism Industry Association of Nova Scotia (TIANS), the Department of Tourism, Culture & Heritage and industry stakeholders.

The long list of festivals and events formerly found in the *Doer's & Dreamer's Guide* was replaced with two pages of editorial featuring signature festivals and events in the province, and the publication formerly known as the *Festivals & Events Digest* was reformatted into a Guide with events categorized into three categories: Signature Events, Community Experience or Hometown Pride.

Criteria are as follows:

- **Signature Events** - One-time only special events of interest to the Province at large or festivals/events of national or international appeal that have the ability to attract visitors to Nova Scotia specifically for their festival/event. In the *2008 Festivals and Events Guide*, Signature Festivals held in Halifax include:
  - Royal Nova Scotia International Tattoo (29<sup>th</sup> year)
  - Atlantic Jazz Festival – nine days of jazz in July (22<sup>nd</sup> year)
  - Halifax Pride Festival – eight days in July (20<sup>th</sup> year)
  - Halifax International Busker Festival featuring 500 performers on the waterfront over 11 days in August
  - Atlantic Film Festival – 10 days in September
  - Drum! – a musical tribute to Nova Scotia's culture (Sept 12 to Oct 12)
  - A new festival featuring international blues, arts and culture – Great Atlantic Blues & Beyond Festival (Sept 19-21)
- **Community Experiences** - Festivals/events of regional appeal that have the ability to attract visitation to their region specifically for their event from other parts of Nova Scotia or Atlantic Canada.
- **Hometown Pride** - Festivals/events of local appeal whose primary objective is to gather the community for a specific cause, reason or event, and is generally held for a portion of a day or a full day. For these festivals/event, tourism is not the primary motive for having the event.

Of the 750 festivals and events hosted within Nova Scotia in 2004, 31 were Signature Events, 27 of which were held on an annual basis, with four one-time or occasional events, including *Tall Ships* and various sports championships.

### **A Strategic Analysis of Nova Scotia Festivals and Events Industry, 2004**

In 2004, a long-term strategy for the sustainability of the festivals and events industry in the province was developed. The strategy provided a series of long-term priorities, action plans and timelines that enable the Nova Scotia festivals and events industry to become a leader in setting competitive business standards and performances for festivals and events organizers nation-wide. The principal findings and recommendations for action by the F&E Committee and TIANS include<sup>150</sup>:

1. Formation of a Nova Scotia Festivals and Events Council to represent and provide leadership for the sector across the province.
2. Establishment of a Nova Scotia Festivals and Events Resource Centre with staff and resources to support activities in the areas of:
  - Development and management of a database of F&E;
  - Operation of an F&E research and impact assessment program;
  - Outreach training and planning support; and

- Promotion and co-ordination of joint marketing by regional F&E groups.
3. Development of a comprehensive human resources development strategy for the F&E sector.
  4. Joint initiatives by the new F&E Resource Centre and the Nova Scotia Department of Tourism, Culture and Heritage to develop effective data collection and evaluation tools as a basis for ongoing assessment of the impacts of the F&E sector in the province.

### **A Business Development Tool for Festivals and Events**

In an effort to assist in the establishment and planning of tourism events, the Nova Scotia Department of Tourism, Culture and Heritage commissioned the Economic Planning Group to develop a *Guide to Planning and Hosting a Community Festival or Event in Nova Scotia*.<sup>151</sup> The resulting manual provides the reader with a step-by-step guide to establishing a community festival or event, which can attract more tourists and incremental tourist spending to a community, with chapters devoted to the following topics:

- Developing your proposal
- Getting started
- Dollars and cents – generating revenues
- Organization and operations
- If something can go wrong...
- Marketing the festival
- Post event issues.

### **Current Strategic Focus: Music and Gaelic Festivals, and Sporting Events**

The province's marketing and communication programs focus on the high-profile events including *Tall Ships Challenge*, the *Gathering of the Clans*, the *East Coast Music Awards*, *Celtic Colours International Festival*, *Drum!*, and other major concert events to encourage music fans to come and experience the province.

Nova Scotia's Department of Tourism, Culture and Heritage recognizes the importance that cultural activities contribute to a community's sense of identity and pride of place, and actively working with its communities to focus events and festivals on the strengths of its music and Gaelic heritage. To this end, the Tourism Industry Association of Nova Scotia is currently:

- Preparing a three-year action plan for the government's partnership in the development of Gaelic cultural resources in Nova Scotia in response to the community's strategic priorities; and,
- Developing a three-year joint plan for the implementation of the MOU with the Highland Council in Scotland. The plan will encourage development of community to community links between Nova Scotia and the Highlands of Scotland with particular focus initially on the development of educational Gaelic festivals (feis) and language education.<sup>152</sup>

This strategy is industry-led and supported by the Department of Tourism, Culture and Heritage.

Halifax is also currently developing a bid to host the 2014 Commonwealth Games. *Sport Nova Scotia* and the Halifax Regional Municipality sought support for the bid from the federal government, recognizing that the *2014 Games* would have an important impact on Nova Scotia as well as on sport infrastructure and athletic development in Atlantic Canada.

### **Case Study: Celtic Colours Festival – Focusing Increased Resources of Marketing**

The *Celtic Colours Festival* is an annual occurring international festival featuring local, Canadian and international Celtic musicians, dancers, performers and storytellers and attracting Canadian and international visitors. The nine-day festival, which began in 1997, features concerts throughout Cape Breton Island, with 30 host communities presenting workshops in Gaelic language and song, components of tradition, instrument instruction and traditional dance, as well as cultural tours, ceilidhs, a lecture series,

visual art exhibitions, and a nightly Festival Club. The model engages the host communities in planning, design and delivery of the celebrations.<sup>153</sup>

In preparing *The Business Case for Growing Tourism in Nova Scotia*,<sup>154</sup> the consulting team identified a focused marketing campaign for the *Celtic Colours Festival*, which was based on market research, as being a prime example for investing more heavily in Nova Scotia's tourism industry. According to event organizers, the marketing partnership between the Marketing Division of Tourism and Culture and Enterprise Cape Breton Corporation resulted in a world-class cultural event, which:

- Provided an excellent conversion rate;
- Was a demand generator and trip extender;
- Drew significant numbers of long-haul international visitors; and
- Resulted in product development, with the music workshops becoming a learning vacation product on their own.

### **Performance Measurements**

This *Celtic Colours Festival* brings social and economic benefits to local communities, who are actively engaged in the presentation and facilitation of the experiences. The festival provides the following benefits.

- *Economic Benefits* - In 2005, Celtic Colours attracted over 5,000 visitors from outside the province, helped to extend Cape Breton's tourism season and generated more than \$43 Million for its economy during its first nine years.
- *Environmental Impacts*- Environmentally, the festival has contributed to the conservation of the musical heritage by raising an awareness and appreciation of this aspect of Cape Breton's heritage both locally and internationally. The festival has also restored local resident capacities to perform and present the musical heritage.
- *Social Impacts*- Socially, the festival has contributed to the pride and health of local communities, diversified employment and revenue sources, and strengthened local alliances between various sectors of the larger tourism industry and heritage conservation interests.

### **Case Study: Tall Ships 2000, A Commemorative Event**

ATI Consulting was retained to evaluate the economic impact of the *Tall Ships* event, which took place over a five-day period in July 2000, and to find out whether the event had a "lasting effect on the likelihood that visitors would return to Nova Scotia and/or recommend it to their friends and business associates."<sup>155</sup> The *Tall Ships* event, featuring 82 Talls Ships, attracted an estimated 1.13 million visitors, with 52% of the visitors coming from outside the province. The event received high ratings from visitors, event sponsor and suppliers, with a minority of event sponsors identifying communication problems with event organizers and concern that the direct benefits they received were lower than expected given the costs to participate.

The study concluded that *Tall Ships* event was a tremendous success, stating that:

- It is the "type of event well-suited to the area, Halifax Harbour and the Halifax Waterfront";
- It had "instilled pride in the people of this province"; and
- The national media coverage was substantial and unquestionably enhanced the image of Halifax and Nova Scotia."

Based on the lessons learned, the study made the following recommendations:

- The role of professional event organizers should be increased in order to improve communication between the *Tall Ships* organization and sponsors/suppliers, as well as between the *Tall Ships* organization and the institutions and businesses on the waterfront.
- Improved cooperation between *Tall Ships* organizers and Tourism Nova Scotia, TIANS, and others would help to promote linkages to other tourist opportunities in Nova Scotia, and therefore to maximize the benefits derived from the *Tall Ships* event.

The most important measure to use in evaluating a special event is the incremental impacts, which “describe the economic effects that would not have occurred in the subject jurisdiction if the project were not undertaken.” Only by comparing the positive incremental impacts with the cost of the project can one determine whether the benefits exceed the costs, and by how much.

## **NEWFOUNDLAND AND LABRADOR**

### **Background**

During the early 1990s, the Province of Newfoundland was faced with an economic recession post the moratorium on its cod industry. At the same time, tourism visitation was flat with the provincial investment in tourism in the order of \$1 to \$1.3 Million per year. A 1992 *Tourism Strategic Plan* identified a series of special celebrations as a means to highlight Newfoundland’s unique culture and heritage. As such, during the six-year period between 1997 and 2002, the Province of Newfoundland and Labrador, through the Department of Tourism, Culture and Recreation embarked on a *Major Events Promotional Strategy*, including the following five key celebrations:

- Cabot 500 in 1997
- Soiree '99 in 1999
- Vikings 1000! in 2000
- Receiving the World in 2001
- Access North-Labrador in 2002

### **Case Study: *Cabot 500 Anniversary Celebrations in 1997***

Commemorating John Cabot’s historic voyage from Bristol, England to Bonavista, Newfoundland, the year-long *Cabot 500* celebrations were funded by the Government of Newfoundland and Labrador with assistance provided by the Federal Government and corporate sponsors including Labatt, NewTel Communications, Marine Atlantic, Air Canada/Air Nova, Sobey’s, PetroCanada, CIBC and CBC Television. On the strength of the celebrations, the Minister of Tourism, Culture and Recreation, Sandra Kelly, made the following comments in the House of Assembly:

*1997 has become a benchmark year in terms of future tourism growth. The success of the year goes beyond traditional yardsticks of non-resident visitation and tourism expenditures, in that we have also achieved unprecedented awareness of Newfoundland and Labrador throughout the world.*<sup>156</sup>

The *Cabot 500* was the largest of the series of celebration events, and had the following goals and objectives:

#### **Goals**

- Stimulate the economy
- Generate pride and confidence
- Generate optimism for the future
- Foster unity among groups and individuals
- Celebrate and have fun

#### **Objectives**

- Expand non-resident visitation and spending
- Expand resident vacationing within the province
- Promote investment and product development
- Expand artistic expression
- Increase understanding of cultural heritage

### **Results and Legacies of *Cabot 500***

#### **Governance, Organization and Management**

A special operating agency was developed to oversee the *Cabot 500*. It was established to plan, organize, manage and supervise tourism special events for the Province. During its initial years, the agency was fraught with accountability problems, coupled with an immature tourism industry and limited exposure to special events management and implementation. Due to financial irregularities, the initial special operating entity was shut down and was reborn as a provincial crown corporation, with full public accountability required for good governance, stewardship of public money and public trust (including an evaluation framework, performance monitoring and reporting).

Through its Special Celebrations Corporation, the Department of Tourism, Culture and Recreation incorporated special events in its tourism promotion to complement its core “brand” marketing strategy, including: *Soiree '99*, *Vikings! 1000 Years*, *Receiving the World* and *Access North-Labrador* in 2002.

Under the program, all revenues generated from sponsors, partnerships, merchandising and other sources were kept separate from the government’s Consolidated Revenue Fund. This allowed the Corporation better control over its finances, but also gave it some flexibility to respond to revenue-generating opportunities within the special events.<sup>157</sup>

#### **Performance Measurement**

The major legacies of the *Cabot 500* celebration were an increased awareness of the province’s tourism product, and the continuing growth in visitation and expenditures. The *Cabot 500* commemorative event resulted in an additional 69,000 persons visiting the province in 1997, a 22% increase over 1996, and an incremental contribution of \$37 Million to the economy.<sup>158</sup> With a provincial investment of \$10 to \$15 Million to launch the event, the incremental tourism expenditures was seen as a good return on its investment.

Much of the visitation increase during the commemorative event was attributed to the awareness, interest and lure generated by the *Matthew* Visit (including the Royal Visit) and the record number of visiting friends and relatives who returned to the province for the celebration year.

#### *Gaining International Recognition*

The *Cabot 500* Celebrations received two international tourism awards including:

- First runner up in the Silver Otter Award of the for its innovative and exciting year-long calendar of events – International and British Tourism Awards, by the British Guild of Travel Writers; and
- Number One Canadian Event in North America – American Bus Association.

### *Creating Legacy Events, Improved Infrastructure and Extended Season*

The *John Cabot 500<sup>th</sup> Anniversary Celebrations Calendar* included 336 events, a 54% increase over the total number of festivals and events held in 1996. A number of these events, such as *Festival 500: Sharing the Voices*, and the *Trinity Pageant/Festival in the Bight* became legacy events for the province, with enhanced product, new theatre infrastructure and an extended season.

### *Increased Event Management and Marketing Skills*

Special events of this scale require specialized training and experience in events management, and in the initial years, the Province recognized a need for more up-front training and technical expertise. However, over the course of the event, numerous volunteers gained event management and marketing skills, including special training offered by the Cabot 500 Corporation. This legacy of skills and experience contributed to the success of further events, including the *Soiree '99* and *Viking Millennium*.

### *Civic Pride*

In November 1997, through a study funded by the Canada-Newfoundland Economic Renewal Agreement, 1,600 residents were interviewed to provide insight into the results of the *Cabot 500*. Three-in-every-four residents surveyed (76%) felt that the celebrations had given them a greater sense of pride in being a resident of Newfoundland and Labrador and 87% were satisfied with the *Cabot 500* events and activities. More than one-in-three residents (37%) actively contacted friends and relatives outside the province to encourage them to visit in 1997. Newfoundlanders and Labradorians became the most important and effective tourism ambassadors during the *Cabot 500* celebration year.

### *Increase in Meetings and Conventions and Group Travel*

During the event year, there was a significant increase in conventions, and conventions-related spin-off, especially in the St. John's and Avalon Region. This was the beginning of MC&IT as a growth sector for the province, which in turn led to the construction of the St. John's Convention Centre in 2005. Group travel also increased during *Cabot 500*, especially along the west coast, which in turn led to the growth of Gros Morne as an attraction icon.

### *Corporate Sponsorship*

Over \$750,000 was raised by corporate sponsors to offset the bottom-line expenses of the event, with most sponsors identifying pride and support of Newfoundland and Labrador as reasons for sponsorship.

### *Education/Curriculum*

Curriculum materials and special projects were developed, with increased curriculum content on Newfoundland and Labrador heritage, with special events and celebrations adding a legacy of pride, and knowledge of culture and heritage.

### **Lessons Learned from a Commemorative Event Strategy**

According to the Province, results of the *Special Celebration Strategy* provided the platform for a more focused marketing strategy, which in turn increased:

- Product awareness and identification;
- Business travel stemming from strong economic growth, the celebration events and the opening of the St. John's Convention Centre;

- Media coverage of the Province;
- New and enhanced infrastructure including:
  - expanded ferry capacity on the Gulf crossing
  - construction of the Trans Labrador Highway
  - aggressive promotion of the Province as a cruiseship destination
- Initiatives aimed at enhancing overall service delivery to tourists, including:
  - continued enhancements in service quality; and
  - an increase in the variety of available tourism experiences.

The special celebrations were a means of leveraging additional funding from the federal government through existing federal-provincial agreements. These agreements had been in place since the 1970's, but became extremely important during the downturn of the fishery industry in the 1990's. Special events were utilized as a strategy to leverage more from these agreements for marketing and product development purposes.

The gains in tourism volumes and expenditures also invigorated the industry resulting in additional investments in transportation, accommodation, heritage and recreation facility infrastructure.<sup>159</sup> The record growth trend held for four years after 1997, with non-resident visits and expenditures increasing by 12% in 1999 and 22% in 2000.

However, according to research completed by T. Baum (1999),<sup>160</sup> *Cabot 500* failed to meet expectations even in its event year of 1997, with the failure blamed on a lack of planning, poor marketing, and poor management, notably the premature sale of the "icon" of the event, a reconstruction of Cabot's ship, the *Matthew*, away from the province. According to Baum, the lessons learned from the mega events strategy, were slow in learning, as the Province moved to repeat the exercise in 1999 and 2000.

Research indicated that the Multi-Year Major Events Strategy would have benefited from more pre-committed, sustained funding to allow for pre-planning and sufficient marketing lead time. This was especially crucial as there was a minimum of three years lead time required for impact: subsequent anniversaries did not have the broad appeal and weight/lure of Cabot 500; difficulty reconciling/aligning event objectives with core tourism marketing objectives; long-term visitation targets were not realized. The impact of Cabot 500 on brand integration was too late, pointing to a need to integrate the special event brand with the provincial brand.

As part of the Economic Planning Group's (EPG) *Tourism Marketing Strategy Review* in 2002, the consultants were asked to address the question of "special celebrations" and offer recommendations on what, if anything could be gleaned from these major events. While EPG agreed that the major celebration events had contributed to increased awareness of the Province, and generated visitation that might not have come otherwise, the following negative impacts were also noted as follows<sup>161</sup>:

- Major events cause a peaking in visitation during the event and "steal" from other periods of the year;
- They steal visitation from areas of the province not participating in the event;
- They disrupt the natural pattern of visitation during the event (and for many people, the entire season), by discouraging visitation from people not interested in the event itself. Visitors don't want to be affected by the extra traffic and higher prices;
- They build visitation from those interested in the event itself (but are they the priority target market for the province?); and,

- Events that are not “on strategy” with the tourism marketing plan, not only do not contribute to the strategy, but they can undermine it.

Furthermore, EPG maintains that for a major event to become a tourism product, it has to build legacies of sustaining products and experiences for visitors. This was accomplished with the Viking celebration, with the addition of new tourism product provided for the Northern Peninsula. However, with the *Cabot 500*, the event did not result in a new product offer, while the *Soiree and Times* in 1999, partially completed a legacy mandate.<sup>162</sup>

As part of its *Tourism Marketing Strategy Review*, the consultants recommended that the staff of the Special Celebrations Corporation be brought into the Tourism Product Development Division to provide the services summarized in Table 5.

TABLE 5 Cultural Programs Partnership Program		
Types	Criteria	Support
Festivals Exhibits/shows Music Theatre	<ul style="list-style-type: none"> <li>▪ Significant/authentic theme</li> <li>▪ Good plan/sufficient funding (with support)</li> <li>▪ Sponsors/supporters available</li> <li>▪ Quality facilities and programs</li> <li>▪ Visitor/tourist services and packages</li> <li>▪ Travel Trade ready</li> </ul>	<ul style="list-style-type: none"> <li>○ Coaching</li> <li>○ Facilitation</li> <li>○ Collateral</li> <li>○ Support services</li> <li>○ Packaging for tourism markets</li> <li>○ Marketing support</li> </ul>

Source: *Newfoundland and Labrador Tourism Marketing Strategy Review, Final Report, EPG of Canada, pg. 98*

### Policies and Programs to Support a Cultural Strategy

Since 2000, the Province re-focused its tourism efforts on new product offerings and a marketing strategy. In March 2006, the Department of Tourism, Culture and Recreation released its Strategic Cultural Plan, *Creative Newfoundland and Labrador: The Blueprint for Development and Investment in Culture*. The *Blueprint* represents a five-year strategy designed:

*“to nurture our cultural strengths and to protect and promote our heritage, celebrate our identity, and champion creativity”*

*Speech from the Throne 2005.*

The Plan also includes a commitment of \$17.6 Million over three years to preserve and promote the arts and cultural sectors. Culture is thereby recognized as a major player in the Province’s expanding tourism industry.

Now in its 3<sup>rd</sup> year of implementation, the Province is currently completing a Heritage Framework, which calls for the development and implementation of a Heritage Designation and Commemoration Program. This program will recognize historic persons, places or events, which have played a significant role in the history and culture of Newfoundland and Labrador.

Through the *Blueprint*, the Province has also increased its support of professional artists in the creative process, by more than doubling its annual funding for grants and programs to the Newfoundland and Labrador Arts Council and increasing funding to *Music Newfoundland and Labrador* from \$200,000 to \$300,000 per year. As an example, The *East Coast Music Awards, Festival and Conference*, which is an annual event dedicated to fostering, promoting, and celebrating East Coast music locally and globally, has grown to become a significant event in Canada’s entertainment industry. The 2008 ECMA awards were held February 8-10 in Fredericton, NB, with the 2009 ECMA awards to be held Cornerbrook, NL, which will particularly benefit winter tourism operators on the west coast.

In Spring 2008, the Province conducted workshops in Cornerbrook, St. John’s, and Labrador to seek input from industry stakeholders on emerging opportunities to develop closer links between the province’s



rich culture and growing tourism industry, including a focus on opportunities within the province's Aboriginal communities.

In its Spring Budget 2008, the province announced a further \$2.1 Million investment in cultural and heritage products funded through the Ministry of Tourism, Culture and Recreation's Cultural Economic Development Program (CEDP). As at June 2008, the Ministry had invested over \$300,000 to support a number of flagship summer festivals and events. CEDP projects are selected on the strengths of business plans, artistic vision and potential for development within a specific sector.

#### **Case Study: *Canada Games in 1998***

Normally after a highly successful event, some slippage in visitation can be expected. However, in 1998, Newfoundland and Labrador maintained the demand levels achieved in 1997, and recorded a further 1% increase in non-resident visits. While there was no special celebration held in 1998, Cornerbrook hosted the *Canada Winter Games* during this year, with over 3,200 athletes, coaches and managers participating in the event, together with 6,500 volunteers. Direct benefits included increased tourism volumes and expenditures, the construction of the Canada Games Centre, experienced volunteers and coaches, greater commitment to sport, and increased media exposure and publicity for the region's tourism product.

#### **Case Study: *Soiree 99 Celebrations***

The *Soiree 99* celebration commemorated the 50<sup>th</sup> anniversary of Newfoundland and Labrador's entry into confederation with Canada, which included a Canada Conference held March 29-31, 1999 in St. John's and a gala concert featuring Newfoundland and Canadian talent, which was broadcast nationally on the CTV network, together with celebrations throughout the balance of the year. Significant corporate sponsors included: Newtel, Air Canada/Air Nova, Petro-Canada, Scotiabank and Hibernia Management and Development Corporation.

In 1999, non-resident visitation to the province grew by 6.8% to an estimated 408,500 visitors, with tourism expenditures reaching \$263 Million, an increase of 9.5% over 1998. According to the Ministry of Tourism, Recreation and Culture, the continued strength of the tourism industry was attributable to the increased product awareness through special celebrations like *Soiree '99* and the upcoming *Vikings! 1000 Years*, as well as a more favourable exchange rate, and strong economic growth which was fueling business travel.<sup>163</sup>

#### **Case Study: *Vikings Millennium in 2000***

The Province's 3<sup>rd</sup> special tourism event promotion was *Vikings! 1000 Years* - a province-wide event with a focus on the Viking settlement in L'Anse aux Meadows National Historic Site on the Great Northern Peninsula. Major events during the 2000 commemorative year included:

- A recreation of Leif Ericson's journey, with an arrival ceremony at L'Anse aux Meadows (July 28 – Aug 21);
- A multi-media exhibit led by the Newfoundland Museum (Jun to Oct);
- The creation of Norstead -- a Viking Village showcasing crafts, skills and foods of the Viking era (July to Sept);
- Sailing of the Viking Trail, a fleet of 12 Viking ships arriving at L'Anse aux Meadows and sailing to 10 official Ports of Call (July to Aug); and,
- A guided snowmobile tour of the Northern Peninsula and Southern Labrador snowmobile trail system (Winter 2001).

There were also 10 Viking affiliated events throughout the Province, including the Vikings International Symposium and the Viking Millennium Monument.

Funding for planning, events and marketing of the *Vikings! 1000 Years* celebration was provided by the Department of Tourism, Culture and Recreation, Parks Canada and the Viking Trail Tourism Association,

with support provided by the Federal Government, Province (\$4.3 Million), and the Millennium Bureau of Canada. The three major corporate sponsors were Petro Canada, NewTel and Newfoundland Power.

Tourism posted another solid year in 2000, with total visitors reaching a record 426,250, up 3.2% over 1999. Tourism spending was recorded at \$290 Million, compared to \$263 Million in 1999, representing an increase of 10%.

### **Case Study: *Cupids400* - 2010**

While the early 1990s saw the Province taking a “top down” approach to Special Celebrations by identifying, planning, organizing, managing and supervising tourism special events for the Province, today’s approach is driven from the “bottom up” with the communities and stakeholders in identifying their interest in celebrating a commemorative event. To this end, the Cupers Cove Heritage Foundation and the Ministry of Tourism, Culture and Recreation is currently seeking a financial commitment of \$7 Million from the Federal Government to support plans to mark the 400<sup>th</sup> anniversary of Cupids in 2010.

The Town of Cupids, Newfoundland is the site of the first English colony established in Canada. To date, the Provincial Government has committed more than \$2 Million and is working closely with *Cupids400 Inc.* In addition to celebration events, there are plans to construct a world-class interpretation centre to explain the provincial, national and international significance of Cupids, and to house approximately 110,000 artifacts uncovered since archeologist Bill Gilbert discovered the site of the original Guy Plantation in 1995. According to the Ministry, the 2010 celebrations are projected to inject \$15 Million in the provincial economy and tourism related benefits to the town and the region, including infrastructure.<sup>164</sup>

Planning and implementation of this project by the Cupers Cove Heritage Foundation and its marketing and product development, along with visitor information programs and activities, is a collaborative, regional and partnership-driven effort, and meets the Provincial requirements for heritage celebrations.

## **WESTERN CANADA**

### **British Columbia**

British Columbia, in partnership with Ministry of Sport, Tourism and the Arts, and 2010 Legacies Now are committed to building BC’s reputation as a premier sport event destination and maximizing sport hosting opportunities leading up to, and beyond the *2010 Winter Olympic Games*. The partnership has identified the growth potential of integrating the sport and tourism industries in the province through a number of the following sport tourism initiatives including<sup>165</sup>:

### **Event Hosting and Evaluation**

#### **Hosting BC Grant Program**

Grants ranging from \$5,000 to \$50,000 are being provided through the Ministry of Sport, Tourism and the Arts to organizations in British Columbia to stage single sport international and national level events in the province. Eligible events range from the World Championship and World Cup level to National Championships and North American level events. This program is part of the efforts of the *2010 Legacies Now*, to maximize the number of events prior to and post 2010, as well as to build on the province’s reputation as a premier sport event-hosting destination. During the past three years, the program has granted \$2.2 Million dollars in 34 communities to host 162 events in communities throughout B.C.

#### **Pre-Games Training and Team Hosting**

The Province of BC, Tourism BC, the BC 2010 Olympic and Paralympic Winter Games Secretariat and *2010 Legacies Now* have taken a coordinated approach to attracting teams and countries to BC for pre-Games training. The approach includes:

- *High Quality Information* – A “concierge/secretariat” service to liaise between BC communities, teams, and countries, and other relevant partners.
- *Open Invitation* – An open invitation to all foreign teams inviting them to train in BC.

- *Targeted Team Approach* – A coordinated effort to attract and secure teams identified as having the best potential for training in BC.
- *Targeted Community Approach* – The “concierge/secretariat” will help package information on interested communities to promote them to potential teams.

## **Education and Training**

### **Community Sport Tourism Workshops**

Tourism BC and 2010 Legacies Now have designed a three-hour workshop for communities covering the following topics:

- Overview of the tourism industry
- Sport tourism internationally, federally, provincially and locally
- Community and facility inventory
- BC sport system
- Available tools and resources
- Sharing of best practices

Since January 2005, 30 workshops with an estimated 600 participants have been held in communities throughout BC.

### **Sport Tourism Guide**

The Sport Tourism Guide is one of nine guides in Tourism BC's *Tourism Business Essentials Series*<sup>®</sup> which have been developed in partnership with the tourism industry. Since 2004, over 300 Sport Tourism Guides have been sold, which cover the following topics:

- Understanding sport tourism
- Event bidding and hosting
- Tracking the economic impacts
- Industry trends
- Sport tourism in your community

## **Marketing and Promotion**

### **BC Sport Tourism Events Marketplace**

Hosting an annual one-day *BC Tourism Events Marketplace* event that offers a business-to-business opportunity for community representatives to meet with Provincial Sport Organizations.

### **Sport Tourism Benefits Piece**

A take-away marketing piece was developed to outline the benefits of sport tourism, which in turn is distributed to key community stakeholders, government officials/decision makers and provincial sport organizations.

## **Community and Social Development**

### **BC Sport Event Housing & Resort Guide**

An on-line searchable database that highlights the communities, teams sports and facilities that B.C. offers to sport event organizers worldwide ([www.hostingbc.ca](http://www.hostingbc.ca)).

### **Sport Tourism Community Development Program**

A number of BC communities which have established strategies and agencies to help bid for, deliver and host events, (i.e., *Sport Kelowna*, and *SportHost* in Victoria), are developing the Sport Tourism Community Development Program to help other BC communities understand what the sport tourism industry involves and how they might begin the steps to formulate their own sport tourism strategy.

## **Industry Research and Coordination**

## **BC Sport Tourism Network**

The Network, which was established in December 2004, currently has 90 members representing 40 communities in BC. It was formed to facilitate interaction and share knowledge between members of the BC sport tourism community, through the following practices:

- Quarterly meetings (via conference call or in person)
- Monthly e-newsletters informing network members of upcoming event bid deadlines, grants and industry news and Tourism BC and 2010 Legacies Now sport tourism partnership program updates
- An online tool called the BC Sport Tourism Network Community of Practice ([www.sportweb.ca](http://www.sportweb.ca)), with members posting ideas or issues for discussion and feedback.

## **Edmonton, Alberta**

Edmonton Events International and the Edmonton Arts Council are the primary agencies, which attract and support sport tourism and festivals within the City.

### **Sport Tourism**

#### **Edmonton Events International (EEI)**

**Vision:** *To strategically position Edmonton as a premier host city for significant events that creates a legacy.*

**Mission:** *To strengthen Edmonton's International image; to create a strong portfolio of events throughout the year, every year; to maintain a group of expertise dedicated to a common vision; to provide experiences that strengthen Edmonton's cultural and sports community.*

The City of Edmonton was the first North American city to host the *World Championships in Athletics* in 2001. According to Jim Edwards, past President & CEO of Economic Development Edmonton:

*"The net economic impact of The World's for Greater Edmonton is estimated at \$157 Million. However, the greatest legacy of the World's will be realized in the years to come."<sup>166</sup>*

Subsequent to the *World's*, the City went on to host the *2004 Figure Skating Championships*, the *2005 World Masters Games*, the *Grand Prix of Edmonton*, *FIFA World Qualifiers* in 2008 and has recently won the *2009 Hockey Juniors*.

Edmonton Events International (EEI) is a three-tier structure administered by Edmonton Tourism, in concert with the following organizations:

- City of Edmonton
- Northlands
- University of Alberta
- Edmonton Sport Council
- Edmonton Arts Council
- West Edmonton Mall
- Aquila Productions
- Association of Edmonton Convention Hotels
- Edmonton Oilers Hockey Club
- Edmonton Eskimo Football Club
- Edmonton Chamber of Commerce

In order for the City to attract a strong portfolio of sports events throughout the year, EEI provides the following services to organizations: preparation of bid packages; site inspections; accommodation/venue coordination and marketing and promotion of the event.

### **Edmonton: Canada's Festival City**

Edmonton markets itself as *Canada's Festival City*, with more than 30 established festivals devoted to<sup>167</sup>:

- Music: Edmonton's live music festivals include: Edmonton's Labatt Blues Festival, Symphony Under The Sky, Yardbird Jazz Festival and the Edmonton Folk Music Festival, which is one of North America's leading folk festivals.
- Performances: Celebrations of live theatre, dance and film, including the Edmonton International Fringe Theatre Festival, which is the world's second-largest fringe festival, feats Festival of Dance, the Edmonton International Film Festival.
- Visual Arts: The Works Art & Design Festival and the VisualEyez festival of performance art.
- Family fun: International Children's Festival and Edmonton's Capital EX summer exhibition.
- Sports: Canadian Birkebeiner Ski Festival, and the Edmonton Dragon Boat Festival.
- Cultural: The multicultural Edmonton Heritage Festival, Cariwest, the Canadian Finals Rodeo and at powwows that celebrate the City's Western Canadian roots.

Each year an estimated two to three million visitors attend Edmonton's festivals, with a growing number of visitors coming specifically to attend a festival.

### **A Plan for Securing the Future of Arts and Heritage in the City of Edmonton 2008-2018, Edmonton Arts Council<sup>168</sup>**

#### **Background and Overview of Strategy**

Following the City of Edmonton's budget debate in December 2005 and subsequent City Council meeting in April 2006, funds were allocated to the Edmonton Arts Council to develop a cultural plan for the City of Edmonton, for the following reasons:

- An ever-increasing realization of the importance of arts, heritage and culture for the City;
- An acceptance that the City has key responsibilities in arts, heritage and culture;
- An appreciation that the sector is becoming increasingly complex;
- An awareness that the current economic boom in Alberta has increased the pace of development in Edmonton and emphasized the need to be proactive in many areas, including arts, heritage and culture.

The resulting Cultural Plan described a unified vision for the arts and culture in the Edmonton region over the next ten years, including 17 recommendations for action in the arts and 11 in heritage.

#### **Recommendations Pertaining to Festivals and Events**

The following recommendations concerning the City's festivals and events sector were included within the Arts section of the Plan.

#### **Arts Recommendation #6**

*Increase grant support for established arts and festival organizations.*

The City of Edmonton has close to 130 established not-for-profit arts and festival organizations, which produce numerous shows and exhibitions annually. Based on a study completed by the Edmonton Economic Development Corporation, 3.9 Million people attended an event produced by an established arts or festival organization in Edmonton in 2005<sup>169</sup>.

In 2007, just under 100 of Edmonton's not-for-profit arts organizations received about 4.5% of their combined annual operating revenue of approximately \$48 Million from City/Edmonton Arts Council grants, with festival organizations receiving 9%. In 2007, the City funding equated to \$1.76 Million for arts organizations and \$1.06 Million for festivals. The Cultural Plan calls for targeting the City operating grant support for arts organizations at 8% of their combined annual operating revenue and 12% for festivals. The recommended festival funding is higher because of the lower level of grant funds currently available to them from the other two levels of government. Based on the 2007 results, the recommended funding formula would increase the City of Edmonton's Investment grants to \$3.2 Million for Arts and \$1.44 Million for festivals, an increase of \$1.82 Million over current levels. It is expected that this approach will provide increased stability as well as adequate funds for emerging activities.

### **Arts Recommendation #12**

*Create a biennial arts festival with Edmonton as the "Capital City Stage".*

This recommendation calls for the development of a biennial three-day festival celebrating Alberta artists, to take place in Edmonton beginning in 2010. The Plan recommended a budget of \$2 Million every second year be established for production, marketing, administration, with revenue from multiple sources and direct City support not to exceed \$500,000.

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<sup>1</sup> Stokes, R. (August 2003). "A framework for the analysis of events-tourism knowledge networks." *Journal of Hospitality and Tourism Management*, p. 19. AND Getz, D. (1997). *Event Management & Event Tourism*, New York: Cognizant Communications, p. 24.

<sup>2</sup> Getz, D. (1991). *Special Events and Tourism*, New York: Van Nostrand Reinhold, p. 44.

<sup>3</sup> Hill Strategies (2003). "Fact Sheet 2: Analysis by Size of Festival." *Economic Impacts of 97 Festivals and Events Funded by the Ontario Trillium Foundation, the Ontario Arts Council and the Ontario Cultural Attractions Fund*. Prepared for the Ontario Trillium Foundation, April 2003.

<sup>4</sup> Stokes, R. (August 2003). "A framework for the analysis of events-tourism knowledge networks." *Journal of Hospitality and Tourism Management*, p. 22.

<sup>5</sup> Quinn, B. (2006) "Problematizing 'Festival Tourism': Arts Festivals and Sustainable Development in Ireland," *Journal of Sustainable Tourism*. 14:3, 289.

<sup>6</sup> Northwest Development Agency (2004). *A Strategy for Major Events in England's Northwest*.

<sup>7</sup> Department of Culture and the Arts, Government of Western Australia (2004). *Cultural Tourism Strategy*.

<sup>8</sup> Getz, D. (2005). *Event Management and Event Tourism, 2nd. Edition*. New York: Cognizant Communication

<sup>9</sup> Ritchie, B. (1984). "Assessing the impact of hallmark events: conceptual and research issues." *Journal of Travel Research*, 23-1: 2.

<sup>10</sup> Marris, T. (1987). "The role and impact of mega events on regional and national tourism development: resolutions." *Revue de Tourisme*, 4, 3-10.

<sup>11</sup> Northwest Development Agency (2004). *A Strategy for Major Events in England's Northwest*.

<sup>12</sup> Ibid.

<sup>13</sup> Northwest Development Agency (2004). *A Strategy for Major Events in England's Northwest*.

<sup>14</sup> Sherwood, P., Jago, Leo, Deery, M. (2007). *Triple Bottom Line Evaluation of Special Events: Does the Rhetoric Reflect Reporting?* PhD Thesis, Centre for Hospitality and Tourism Research, Victoria University (AU).

<sup>15</sup> International Travel Survey (ITS) U.S. and Overseas, 2006; Canadian Travel Survey (CTS), 2004. NOTE: The 2004 CTS was used because the 2006 Travel Survey of Residents of Canada (TSRC) did not include useful activity data. (See Appendix for a description of methodology and assumptions used to calculate estimates.)

<sup>16</sup> "Events" are fairs/festivals and/or sporting events as per the activity lists of the CTS and ITS questionnaires. Attendance and spending by business convention delegates in Ontario are not included in the analysis.

<sup>17</sup> Spending by Ontario residents who traveled to an Ontario event rather than travelling outside the province is considered negligible (import substitution). See Appendix for more details.

- <sup>18</sup> HLT Advisory Inc. ("HLT") and Tradeshow Week Research ("TSW Research"), *Ontario Convention Market Analysis Final Report, February 2008*, Ontario Ministry of Tourism. NOTE: the assumptions made to arrive at the \$800 million estimate are not included in the published report. Hence, it is impossible to state with any certainty whether the estimates provided for event tourism and convention tourism are comparable.
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