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“A view on the public event sector in Rotterdam”

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Preface

Dit voorwoord schrijf ik in het Nederlands, het schrijven van mijn scriptie in het Engels was al een grote uitdaging. Er is me gezegd dat je bij het kiezen van een scriptie onderwerp een onderwerp moet kiezen dat je interessant vindt anders kom je er niet doorheen. Dat advies heb ik wijselijk ter handen genomen en ben goed na gaan denken over de insteek van deze scriptie. Dan ga je nadenken over de facetten van de studie die je aanspreken en je persoonlijke interesses. Op dat moment deed ik de Master Urban, Transport and Port Economics en had net een inspirerende seminar gevolgd waarin stedelijke ontwikkeling uitgebreid aan bod kwam. Dit onderwerp sprak mij zeer aan, aansluitend op mijn voorliefde voor Rotterdam, de dynamische stad die altijd zal blijven veranderen. Daar wilde ik aan bijdragen, maar dan wel met iets dat mij persoonlijk aansprak. Daar komt het derde aspect van de scriptie naar voren, het organiseren van evenementen. Een jongensdroom die op dit moment nog gerealiseerd moet worden maar waar hard aan gewerkt wordt. Zo ontstaat er een scriptie die gaat over een stad met zijn stedelijke ontwikkeling, de bijdrage van evenementen hieraan en de synergie hiertussen. Hieronder zult u gaan lezen wat er uit dit onderzoek is voortgekomen. Ik wens u veel plezier met het lezen van deze scriptie, die voor mij een mooie en enerverende periode afsluit.

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Salko Hofman

Abstract

This research presents a view on the public event sector in Rotterdam. This view provides the scope, economic characteristics and structure of the event sector in Rotterdam. It sets out general aggregated information on the organizations behind the public events held in the city of Rotterdam. The organizations included in this research have been selected on yearly- or two yearly recurring events with more than 5000 visitors, according to the IFEA application list 2009-2010, and have a department in the region of Rotterdam Rijnmond.

The sector's revenue is estimated on **37,4 million euro**, there are 242 people working full-time in this sector and expands with 4400 during the event season. About the same amount of volunteers are working in this sector, close to 4250. The estimated number of **visitors is 3,7 million a year**, who spent an estimated **190 million euro** (visitors expenditure).

The sector is mainly local orientated, on average about 60% of the suppliers is from the region of Rotterdam and most of the organizations have no profit maximizing goal (84%).

The events are primarily **financed with private money (75%)** and most of the budget goes to the content of events (64%).

This research shows that besides the social, cultural and life enhancing characteristics of events, the sector provides economic benefits to the city, stimulating the economy locally.

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1. Introduction

In today's economy cities are looking for ways to develop and improve their economic performance. Especially in the current market, with its competitive international character, cities are competing for residents, companies, tourist and investors. Policymakers in their quest for the right policy mix are using different aspects of the economy to increase the city's competitiveness. Example are, slogans, building sky-scrapers and declare 'themed years'. Also events and festivals are more and more recognized as important assets to increase the city's appearance, a range of festivals can: attract new money (from outside the hosting region), boosts the tourism activity, increase the quality of life for its residents, strengthen the city's brand, engage social interaction and increase cultural participation (Getz, 2008; Crompton et al., 2001; Stokes, 2008; Smith, 2005; Chougley & Montes, 2011).

The city of Rotterdam is also continuous developing and improving its performance, with a focus on economic development (economic vision 2020). Rotterdam's main source of income is the Port, with a place in the top five of the world's largest ports it focus is entirely international. Besides in the port, this international focus can be found in several other policy targets of the city. One of them is the policy for festivals and events. Rotterdam is known for its festival and event policy and is pioneering for other city's national and international. Recently (august 2010) Rotterdam has been honored as best Festival and Event City of the world (500.000 –1.000.000 citizens) by the International Festival and Event Association (IFEA). Its policy embraces the sector as valuable for the economy, image and quality of life of the city.

This award is not granted without a reason, the event history of Rotterdam started as early as 1928 with the enormous exposition called **Nenijto** (Nederlandse Nijverheidstentoonstelling) an exposition on technical and industrial equipment and although the event policy originally started from the reconstruction of the city after WWII, since the 1990's Rotterdam has been actively developing an event policy with two arm-length departments: Rotterdam Festivals and Rotterdam Topsport. Respectively focusing on cultural- and sports events (more detailed explained in chapter 3). They have been adapting and improving their vision ever since.

The second big event was held in 1935 and the early version of the popular Harbor Days, called "the international harbor days", to better connect the harbor with the city, a goal the event still pursues. The next event worthy of appointing is the first event after the WWII, **Rotterdam Ahoy** (1950) an event focusing on the reconstruction and showing the vitality of the city. Ten years after the war there was **E55**, the national energy manifestation, an event to internationally promote the city of Rotterdam. An objective that was never far from the city, illustrated by the current slogan: WORLD PORT WORLD CITY".

In 1960 an event was held that has left its mark ever since, the **Floriade** (the international agriculture exposition), symbolic for the growing prosperity and increasing leisure time marked by the construction of the "Euromast", a building from architect Maaskant, 107 meters high, currently is has a height of 185 meters after adding a tower in 1970. Twenty-five years after liberation the legendary **Woodstock of Rotterdam** was held at the "Kralingse Bos" (Kralinger Forest), three days of music, love, peace and happiness. That same year Rotterdam was also the host city for **C70** (Communication

70') with the primary goal of promoting Rotterdam not only as a work city, but also as a city where you could live and enjoy life.

After a number of one-time events, the rise of the recurring events began, two good examples of this phenomenon are the "*Film International*" event (1972) and the festival "*Poetry International*". Both early editions for the contemporary events, one is the **IFFR** (International Film Festival Rotterdam) and the other is the **Dunya Festival**, an event offering numerous of different world-music acts.

Arriving in the 80's, were several temporary events find their roots, the **Summer Carnival**, the **Metropolis Festival** and the **Heineken Jazz festival**, an early edition of the 'World Port Jazz Festival when it was replaced in 2006 by the - in The Hague originated - internationally famous jazz festival **North Sea Jazz**. The 90's were symbolic for the rise of electronic music with the **Fast Forward Heineken Dance Parade** (1996). A unique festival with trucks (floats) driving throughout the city center. A counterpart is the **Gergiev Festival**, a classical music festival also originated in 1996. A few of the latest acquisitions of these kinds of events offered in Rotterdam are; **Motel Mozaïque**, the **Museum Night** and the '**Pleinbioscoop**' (open-air cinema).

The previously mentioned events are all cultural events. However, Rotterdam is also host to - and long known for - a number of famous sports events like, the **Wieler Zesdaagse** (six days of cycling races, 1936); **CHIO**, the Concours Hippique International Officiel (1948); **ABN Amro World Tennis Tournament** (1972) and **Rotterdam Marathon** (1981). All these sport events are still organized in Rotterdam. This overview based on a work of Bent & Spork (2010).

Relevance – measuring economic contribution

In the last 10 years the event sector changed rapidly. The number of events have increased exponentially and equally the number of visitors. This accelerated the professionalization in the event sector, strikingly illustrated by a quote from one of the operators in Rotterdam: "*We used to prepare (construct) a festival location three weeks ahead of the festival with 40 volunteers, not knowing if the same group will be there the next day. Currently we have three days in front of the festival to prepare the whole location, in this situation you cannot rely solely on volunteers anymore*"(Mark Rouwenhorst, JMR 2011). In this decade also the attention towards scientific research regarding this subject grew. Most attention is given to measuring the economic contribution of either one or more events (Langen & Garcia, 2009; SQW&TNS, 2005; Crompton et al., 2001; Bond, 2008; Higgs & Cunningham, 2008; Pratt, 2004; Jorgoni, 2007; Higgs et al, 2008; Houghton, 1999; DCMS, 1998 & 2001). However research focusing on the social, cultural, promotional and educational impact is conducted as well (Chougley & Montes, 2011).

The impact studies are conducted for different reasons, in general they are conducted to provide foundation for (political) choices of strategy. Especially in the current economy where it is almost always necessary to provide (hard) data. Both policymakers and event organizers embraced the impact studies. The main reason for policymakers is to provide evidential base for a decision or to show the economic contribution of an event in the (wider) local economy. The event organizers usually to underpin the economic value of their event to the city. Other reasons are present like: mapping the visitors' profile or visitors' perception. But also to collect vital information for the communication of key concept or simply to raise awareness of a sector and the issues they face (this subject will be more explicitly elaborated in chapter 4). The rapid change, the growing attention of policymakers to events and the current economy situation, where the dependence on public means have to decrease, make this subject an interesting field of research.

Currently Rotterdam has not yet conducted a similar research, this led to the following research question:

“How can we measure the economic contribution of the public event sector to the local economy and what is the contribution to the Rotterdam economy”

The research question is supported by the following sub- questions:

- *What is a public event (Ch 2)*
- *What is the public event industry (Ch 3)*
- *How can we measure the contribution of public event sector to local economy (Ch 4)*
- *To what extend does the public event sector contribute to the economy of Rotterdam. (Ch 6)*

The first part of this research is a literature review. In which the definition for a public event is set out (chapter 2), the public event sector is described, focusing on Rotterdam (chapter 3), and elaborated on general methods of measuring economic contribution. To eventually choose the method that is most applicable for this research (chapter 4).

The second part of this research is dedicated to mapping the event sector of Rotterdam. Data is collected from three sources, 1) a database 2) a survey, 3) interviews. Chapter 5 describes how this data is collected and processed. The results obtained from the data are presented in chapter 6. Conclusions and recommendations are given in chapter 7 and 8.

2. What is a Public Event?

In order to conduct a thorough research a clear definition of the subject is necessary. This chapter will provide a definition for a public event and give an overview on existing literature. First an introduction is given why it is important to have a clear definition (2.1), followed by the determination of 'event' (2.2), then the 'main international categories' are elaborated (2.3) and the definition for 'public events' in this research is given (2.4). To clearly visualize the broad scope of events, different types of events are discussed (2.5) and the most important aspects will be summarized at the end (2.6).

2.1 Introduction

Celebrations and festivities have been part of human life for thousands of years, often religion related, but also sport activities and seasonal changes have been reasons for celebration. The history of events shows that it is an important factor in human society and has been there for a long time. Describing this vast history cannot be done in a book, let alone a thesis. However, the professionalization of events in the last decade should be mentioned (see chapter 1). More attention is given to the planning and production of events. An increasing number of events are being organized and the strengths and benefits are more and more recognized. Events are used as a way to market places and improve cities image and performance. They are believed to distinguish cities and attract media attention in a more competitive becoming environment. This changed the recognition positively and attention from both the research as the education field grew. Defining (public) events has been done extensively in papers (Getz, 2005; Verhaar, 2004; Torkildsen, 2005; Hall, 1992; Bowdin et al., 2001). Researchers have produced many different definitions, stating different elements as crucial. These definitions cover a part of the concept, and by taking into account the strong points of previous research and the well-grounded opinions from people within the work field, this chapter will come up with a valid and more suitable definition.

2.2 'Event' a comprehensive term

The word *event* can refer to many different things. The broadest description you'll find in the dictionary: *'anything that happens, especially something important or unusual'*¹. As described above there are many definitions, as well as categories. Bowdin et al. (2001) identifies 3 categories: mega-events, major events and local event. A categorization according to: impact, size and (media) attention. Several researchers have tried to capture the crucial aspects of events in a definition. Getz (2008) for example has a clear view on what an event should contain: *'a unique experience for the audience'*. A more complete description is given in Getz' book *Event Management and Tourism (2005)*:

'Planned events are spatial-temporal phenomena, and each is unique because of interactions among the setting, people, and management systems. Much of the appeal of events is that they are

¹ <http://www.oxforddictionaries.com>

never the same, and you have to 'be there' to enjoy the unique experience fully and are all created for a purpose'

Getz' definition covers some crucial aspects, such as the spatial and temporal aspect as well as the creation for a specific purpose. The "uniqueness" factor on the other hand is described by the spatial and time aspect. It would be better to use the definition given by Verhaar (2004), which is a more straight forward explanation, covering about the same aspects:

'An event is a special time and place fixed happening, consciously planned by an initiator (individual, group or organization), focussed on a certain target group, with a specific form to realise a purpose'.

Verhaar (2004) clearly covers two crucial aspects equal to Getz (2008), the time and purpose aspects and emphasizes on: target group, the visitors you want to attract and serve; the format, the shape of an event like, festival, sports or conference; and initiator, the person or organisation initiating the event, leading to a more distinctive definition. Another term used to define the events this thesis is aiming at is '*special event*' (Getz, 2005). It's a broad definition and to implement a universal classification for 'special' is difficult. Goldblatt and Nelson (2001) did try: '*A unique moment in time celebrated with ceremony and ritual to satisfy specific needs*'. Still what is unique will depend on perspective or preference. Therefore the focus will be on defining events. A more recent definition is that of Respons (2009):

'An event is a happening, with begin- and end date, taking place at one or several locations, is removable from this location and aimed at a general or specific objective, while being public accessible'.

What makes this definition distinctive is the last part, 'while being public accessible'. This shows that they only describe events which that are accessible by whoever wants to, thereby excluding events organized for special invited people. This narrows down the range of events, the first step towards a public event. However, first a general definition for *events* should be presented, based on the above cited authors we've come to this definition for events:

'An event is a time (clear begin and end) and place fixed, consciously planned phenomenon, one-time or recurring and organized by a specific format trying to realise an objective, aimed at a specific target group'.

With this general definition we want to make a *public event* part of the general category of events. The next paragraph will discuss the main international categories, to introduce the definition of public events.

2.2.1 Main International Categories of Events

This paragraph will give the most general categories used in the international literature. First a tourism oriented approach will be discussed, referred to as *Hallmark Events*,. Secondly, an approach based on impact (cultural, economic, physical and media) will be discussed, described by *mega, major and local events*.

Hallmark Events

This type of event is primarily to generate attention to a place, city or region. 'Hallmark' is defined as: 'A mark or sign of authenticity or excellence' or 'an outstanding or distinguishing feature²'. So they give a place a distinguished character. This term is generally used to categorize events (Getz, 2005; Torkildsen, 2005; Hall, 1992; Bowdin et al., 2001). Ritchie (1984) was one of the first to come up with a definition on hallmark events:

'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 the uniqueness, status, or timely significance to create interest and attract attention'.

Getz (2005) describes the meaning of the word hallmark as follows: 'a symbol of quality or authenticity that distinguishes some goods from others'. This leads to the following definition of Getz (2005) for Hallmark events:

'Hallmark events are events that possess such significance, in terms of tradition, attractiveness, quality, or publicity, that the events provide the host venue, community, or the destination with a competitive advantage'.

Hallmark events in time can become synonymous for the destination, host venue or community it is linked to like: Carnival and Rio de Janeiro; Jazz and New Orleans; and the Harbour Days and Rotterdam. Hall (1984) states that: "a hallmark events' primary function is to provide the host community with an opportunity to secure high prominence in the tourism market place". These events are believed to have benefits that go far beyond the period the event actually took place. This means that these events are seen as products that provide a competitive advantage and are expected to generate large external benefits. Although the majority of the researchers believe that events are probably originated for non-tourist reasons (Getz, 2005; Hall, 1992), nowadays there is a clear trend towards the interests and attraction of tourist.

Mega, Major and Local Events

In the beginning of scientific describing the events a majority of the researchers tended to divide events according to the number of visitors or capital cost. Later this perspective extended and the, economic, marketing, socio-cultural, and physical impacts became more important (Allen et al. 2002).

Events with the most impact on all aspects are called mega-events. The debate on what makes an event 'mega' is still ongoing (Getz, 2005; Bowdin et al., 2001) Requirements are: number of visitors, media coverage or overall costs (Hall, 1992). Maurice Roche (2002) nicely illustrates a mega event:

'Mega events are dynamic multi-dimensional phenomena – for instance they are simultaneously urban events, touristic events, media events and international or global events – and are simultaneously the subject of collective and corporate discourse and action in each of these dimensions'.

² <http://www.oxforddictionaries.com>

Only a few events can be called 'mega' like, FIFA World Cup's, Olympic Games and expositions, such as the World Exposition in China 2010. A more conventional event is the 'major' event: these events are large enough to cover national or international media attention and these events attract large numbers of. In this category sport events are best represented. However, more and more cultural events are represented as well. Festivals in this category are: Ortel Summer Carnival Rotterdam, Burning Man Festival (US) and Sail Amsterdam. Finally there is the category of 'local' events, these take place on city or municipality scale and have often the objective to increase community involvement or awareness for an organization or activity (Torkildsen, 2005).

Having discussed all the main categories of events, defining the category that will be the aorta to this research will be done in the next paragraph.

2.3 Defining Public Event

The term 'public event' is cited in none of the international literature as a distinctive category of event. Referring to the public domain has only been done once by Getz (2005). In the context of "mega" and "hallmark" events which are considerate to be only public (open to all) events. This is the main reason for the contemporary researchers not to separately describe the public aspect. However in the Netherlands and in this case Rotterdam the term 'public event' is generally applied and accepted to determine an event. It is a broad description often used to define a certain manifestation, festivity or celebration. Eventually this research main focus will be on the events in Rotterdam that can be categorized by the term 'public events'. Therefore this paragraph will introduce an academically based definition suitable for the Dutch event scene.

The step from event towards *public event* is relatively small. *Public* can be referred to as, "*done for the community*" or "*open to all*"³. Jökövi (1996) has made an attempt which resulted in the following definition:

'Public events are organized happenings, which offer the possibility to leisure, and are in principle accessible to all audience, take place time and spatially concentrate, are one-time or recurring, but not more than a couple of times a year and are being visited by an audience from outside the area.'

The definition of Jökövi (1996) covers some determinants for a public event, however it does not combine all the crucial aspects and it includes some unnecessary terms. E.g. the criteria 'visited by people from outside the area', it is not a crucial aspect. Many public events depend on local visitors. The definition of Respons (2009, see page 2) is even more comprehensive and covers almost all the crucial aspects. One aspect it does not cover; the fact that events can be one-time or recurring. The main reason for the different approaches towards events is the local focus. Especially in the Netherlands events have mainly visitors from within the municipality and therefore a local reach.

In the Netherlands every municipality takes a slightly different approach to the policy towards the public event sector in their region or city. This has to do with the APV- law (Algemene Plaatselijke Verordening). This law differs per municipality along with the definition of a public event. The

³ <http://www.oxforddictionaries.com>

definition used by the municipality of Rotterdam is: *“Every for public free (money) accessible phenomenon aimed to entertain”*. This definition is divided into four categories of events 0 – A – B – C. These categories indicate the amount of risk, ranging from zero risk to a high level risk event like, the ‘Summer Carnival Rotterdam’, a three day festivals bringing salsa and swinging beats throughout the city.

Based on the literature and input from people working at the arm-length event departments (see introduction), this research comes to the following definition of public event:

‘A public event is a time (clear begin and end) and place fixed, consciously planned phenomenon. The event is in principle accessible to all audience, one-time or recurring and organized by a specific format trying to realise an objective, aimed at a specific target group’.

This definition covers every public event from one-time events and edition versions, to big events covering several aspects or very specific singular events.

However targeting a specific target group does make a sort of categorization in the different events, by deterring certain people from coming to the event. However this definition is still quite broad neglecting all the shapes and forms and event can have. To make the definition more clear, the next paragraph discuss different types of events.

2.3.1 Types of Public Events

The definition of a public event is determined, now a more detailed categorisation will be made. Because a local book fair cannot be compared to the manifestation during the Dutch Queens Day celebration, with several podia, open bars and music throughout the whole city. Nevertheless both events reach the requirements of the above given definition. Different types of events arise from different objectives, formats and sizes. Generally the form and objective are correlated. If the objective of the event is to entertain, then organizing a congress might not be the best option. Some people of course would experience this as entertainment, but the majority will experience this as an educational event. A cultural festival or music performance would be a better format to realize the objective.

Different objectives to realize

A quick review of the definition for public event (see page 11) shows that a public event should achieve a purpose, target a specific group and do this by a certain format. Purpose, also referred to as objective can vary tremendously. In figure 2.1 the most common objectives are shown: sales, promote, communicate, encounter, motivate, inform, consumption (entertain) and finally acquisition (Verhaar, 2004).

In some cases events serve multiple objectives. When the purpose is to educate, you cannot stop people from encounter each other. Vice versa, sometimes an event explicitly pursues several goals, main objectives and sub objectives, whereby each target group has its own objective. Once a objective is set, a best suitable format is chosen, fitting the purpose.



Figure 3.1 General objectives of an event

The shape of an event

The shape of an event is for a big part determined by the objective. Since there are many different motives for events, several formats have arisen. The chart below (fig. 2.2) covers the main categories of public events. This chart is based on a model of Getz (2005): *'typology of planned event'*. It shows the different forms an event can have: e.g. festivals, meetings, conventions, concerts, conferences, seminars, etc. All these formats are based on the purpose of the event, fun, competition, educate, inform or entertain. Private events like, weddings, home-parties, VIP visits are not included in this chart.

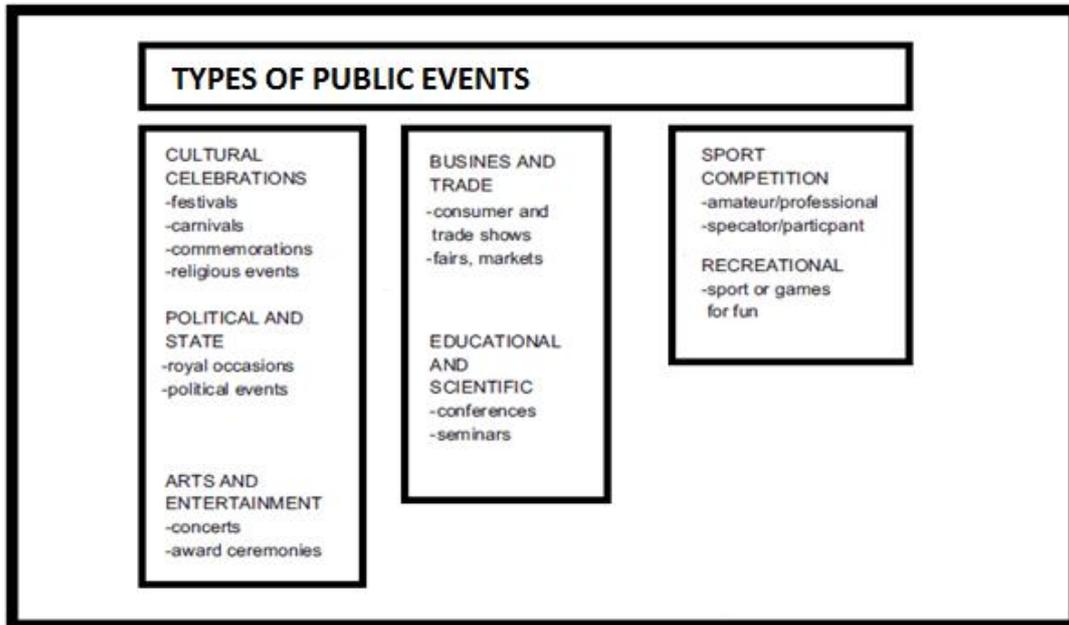


Figure 2.2 Types of Public Events

Size

Events can also be typified by their size. Size can be measured by the number visitors or the total monetary costs. The most common categorization is by number of visitors. A general division according to visitors is given by Verhaar (2004):

- Small** – till 500 visitors a day
- Middle** – circa 500 – 5000 visitors a day
- Big** – more than 5000 visitors a day
- Mega** – more than a million visitors

This categorization is quite broad, few events attract more than a million visitors and the step from more than 5000 visitors a day to a million, even in total, is tremendous. The division according to visitors is not often used by municipalities in the Netherlands. It says little about the impact of an event, Rotterdam for example consciously decided not to use this categorization, but a more innovative approach, according to the impact and risk of the event (see page 9).

Literature about categorization according to costs is scarce. Getz (2005) and Torkildsen (2005), quote the International Association of Tourism Experts, who believes that a ‘mega-event’ should at least cost 500 million dollars.

2.4 Conclusion

The objective of this chapter was to reach a definition for public event and provide an overview on the literature regarding this issue. In the first part events were defined in general, mainly based on the literature of Verhaar (2004), Getz(2008) and Bowdin et al. (2001). From which the main aspects of an event resulted: time and place fixed, consciously planned, one-time or recurring and aimed at a specific objective. Subsequent the international categories have been discussed: Hallmark, mega, major and local events. Leading to the Dutch category; a public event. Several public event definitions were discussed (Jokovi, 1996, Respons, 2009), eventually all the crucial aspects were combined and led to the definition of this research:

'A public event is a time (clear begin and end) and place fixed, conscious planned phenomenon. In principle accessible to all audience and by a specific form trying to realise an objective, aiming at a specific target group'

The definition hosts all the crucial aspects a public event should cover, because it still it covered a wide range of different events. Although a public event can be 'one-time' or 'recurring' this research chooses to especially focus on the recurring events, in order to present an indication of the yearly contribution. Referring to the one-time events as "special" events, a recent example is the Grand Depart 2010 (start of the Tour de France). Another in Rotterdam present phenomenon are the "themed years", previously Rotterdam has been *City of Architecture (2007)*, *City of Water (2003)* and *European Youth Capital (2009)*, these occur every two year and generate many special events and attract a lot of visitors to the city. The themed years and special events will not be included in the revenue number, but an indication of their contribution shall be given.

The next paragraph discussed the different types of public events categorized according to objective and format like, festivals, concert, expositions and congresses. This categorization illustrates the diversity of public events.

In order to conduct a survey on this thesis subject in Rotterdam, a research frame needs to be determined. Already a categorisation is made by selecting only recurring events, both yearly and two-yearly. Another categorisation is according to size; in this case, only 'big' events with more than 5000 visitors are included in the research frame. Even exclusion according to type (form and objective) is going to be made. This research is based on the application list for IFEA event city award (more explicitly discussed later on in the paper). The public events on this list do not include, single concerts, conferences and congresses. These three types of event are not represented by the departments that are responsible for the public events in Rotterdam, nor by Rotterdam Festivals or Rotterdam Topsport. These events are represented by Rotterdam Marketing, another arm-length department.

Now we've defined public event and started to implement a frame for this research, the next chapter will define the public event industry and show all the parties involved within this sector.

3. What is the Public Event Sector?

Now we've defined public events it is time to look at the sector behind these events. This chapter will discuss the wider event environment, and the parties involved in the process of organizing an event. To eventually visualize this sector of Rotterdam in a model. This chapter is based on both literature review and in-depth interviews with event managers in the field.

3.1 Introduction

The event sector is often referred to as a complex sector because of the large variety parties and related industries involved (Bowdin et al., 2001; Verhaar, 2004). This characteristic makes it hard to define the *public event sector*. Broadly the sector can be described as: “A collective term for the companies, organizations and foundations, planning, executing, and contributing to, a public event”. However, such a broad description allows no visualization. Therefore this chapter will give insight in what these parties are.

3.2 The core stakeholders of an event

With varieties on the objective and form of an event, events will have different actors involved with the event. According to Verhaar (2004) seven actors are most important to an event: 1) the provider; 2) the target group; 3) the location operator; 4) the commission party; 5) the financier; 6) the supplier and; 7) the indirect involved interested/stakeholders.

The **provider** is the offering party of the event, an individual, an organization or a collective e.g. a company, an agency or even a cooperation of museums. The **target group**, are the wanted and targeted visitors or participants such as: tourist, companies, doctors, youth, music-lovers etc. The target market depends on the objective of the event. The **location operator** is the person or company that operates the locations where the events can be held: stadiums, concert halls, congress center, cafes, squares, parks and alike. The **commission party**, is the party that gives order to organize an event (initiating), varying from companies to governments. Verhaar (2004) distinguishes two categories: first, the internal assignments given from within a company or institution and second, the external assignments given by party for outside the company. The **financier** is the provider of the financial means for the event such as: investors, banks, funds and subsidies. The **supplier**, a comprehensive part, covering all the parties involved that deliver goods or services to organize the event, from catering to multi-media equipment (more detailed explained in table 3.1). Finally the **indirect involved interested/ stakeholders**, like residents living close to the event and media, are believed by Verhaar to be part of the main stakeholders.

Verhaar (2004) sets out that the activities of these actors are exchangeable. An event can be initiated by the same party that organizes it. Or one of the suppliers can take the initiative to organize an activity held in his location. The same applies to a financier who can also be the commission party.

3.3 The Event Environment

The previous paragraph has given a description of the main actors involved in the realization of an event. This gives a good indication for the parties involved in the sector. However, to determine the structure of this sector, we will use a chart made by Verhaar (2004) called the “evenementenkaart” (event card), shown in figure 3.1. The card describes the wider environment of an event from the perspective of the event manager. It shows what kind of parties an event manager has to deal with. From analyzing this chart, we can distinguish two parts: first, the core of the event environment, the “event branch” and second, the related parties of the event sector.

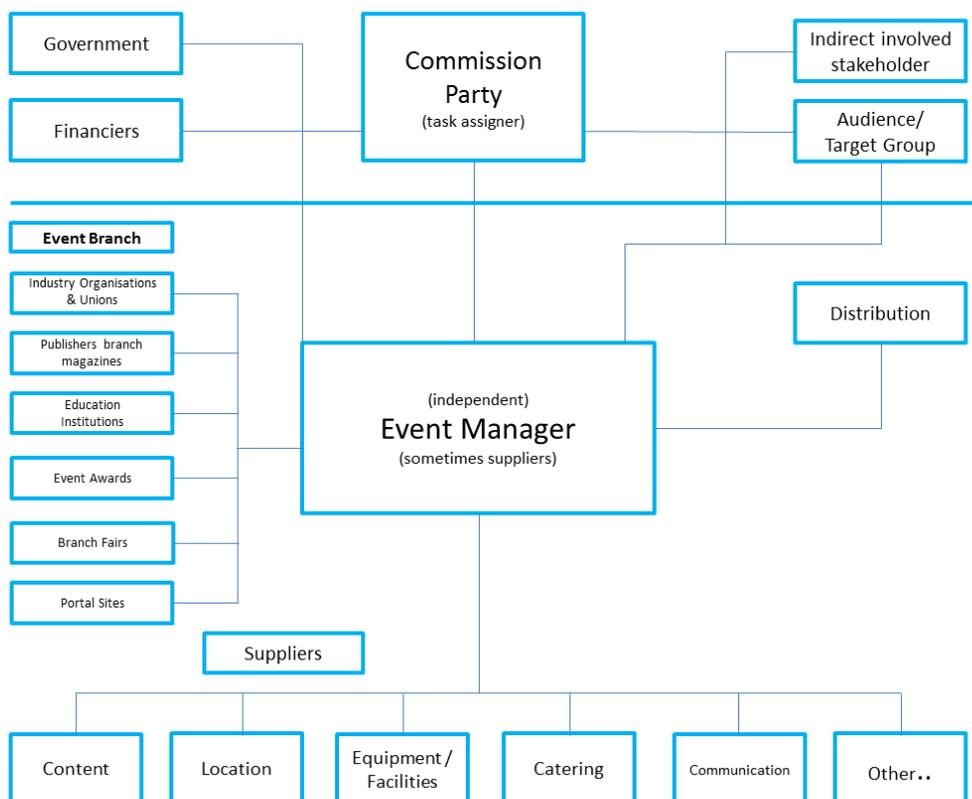


Chart 3.1 ‘Event Card’ (Verhaar 2004)

3.3.1 The core of the event environment “the event branch”

The event branch as shown in this chart can be considered as closest to the event sector referred to in this research. This chart will be used as source of inspiration for the model of the event sector in general. It includes the parties closest to the event manager, with whom he has to work with on regular basis in order to realize the event (exception: the left row, right under “event branch”).

Event Manager

The event manager in the event sector can best be described by the definition of event management by Getz (2008): *“the practice to the design, planning and production of an event”*. It’s the heart of the event sector, the liaison, responsible for the execution of the event and the communication between the different stakeholders.

Suppliers

Suppliers consist of all the parties involved delivering goods or services to the event organizations like: artists, light & sound, catering and communication (table 3.1).

Suppliers of:	
Content	– artists, singers, spokesman, trainers, tour-operators, lasers shows, entertainment, etc.
Location	– party centers, hotels, squares, attraction parks, tents, etc.
Equipment/ facilities	– lights, sounds, decoration, fences, costumes, etc.
Catering	– food, beverage, fun food, restaurants, bars, etc.
Communication	– commercial- and promotion, marketing, communication, merchandising, website.
Other	– transportation, photographers, insurances, cleaning companies, security etc.

Table 3.1 Suppliers to an event (Verhaar, 2004)

Distribution

Without the distribution of tickets, flyers or posters, there is no event. This part stands for the (online) ticket offices and distribution companies.

Related Initiatives

The related initiatives are all the actors in the chart left from the event manager this research refers to as “related initiatives”. These parties have originated from the event sector to support, recognize and develop the event sector like: awards, educational institutions, magazines, unions and portal sites.

3.3.2 The related parties

The related parties are represented by the actors above the thick blue line in the event card. This part visualizes the wider event environment, these parties are not directly part of the sector but (closely) related.

Commission Party

The commission party takes the initiative to organize an event and is the one that wants to realize a specific objective. It has direct concern and it can range from a government department to a private

sports club. It is visualized as an external part of the event industry, but it can also be a location operator or an event manager who takes the initiative. It can be a variety of people or organizations.

Financiers

The financiers provide the financial means to realize the event. Most common are, sponsors, banks, funds and subsidies (provided by both the municipality and the government). Some of them are closely related to the event sector but cannot be counted to the sector, like the funds organizations.

Government

Verhaar (2004) sees to the government as regulator and law enforcer, including fireman, police, law & regulation and catering requirements.

Customers/Target Market

The target market is the group of visitors the event wants to attract. It is named target market, because the chart takes the perspective of an event manager. The manager has to be aware of the audience and type of visitors he wants to attract, like participants and guests.

Indirect involved stakeholders

The indirect involved stakeholders are the parties that are unwillingly involved or interested in the event, like neighborhood residents or media.

This 'event card' gives a good frame to establish a model of the event sector.

3.4 Composing general parties of the public event environment

One of the characteristics of the event sector is that it is locally orientated. Every city has its own (typical) public events, his historical context of governance and regulations that are applied locally (APV-law). For this reason, the shape of the event sector differs per municipality. This paragraph tries to identify general parties in the event sector; these will be discussed and presented in a "general" model. This model is brought back to four main actors in the core of the event environment: the 'public event sector'. This model is inspired by the theory of Verhaar (2004) and by interviews held with different stakeholders in the sector.

The main actors are: the **operator**, the **suppliers**, and the **municipality** (chart 3.2). In some cases only two of these parties form the core of the event sector excluding the municipality (this subject will be elaborated more explicitly later in this paragraph). The wider event environment includes the initiator, the financier, the audience/visitors, the related industries.

The actors in the wider event environment will be described later. First the parties in '*the public event sector*' are discussed.

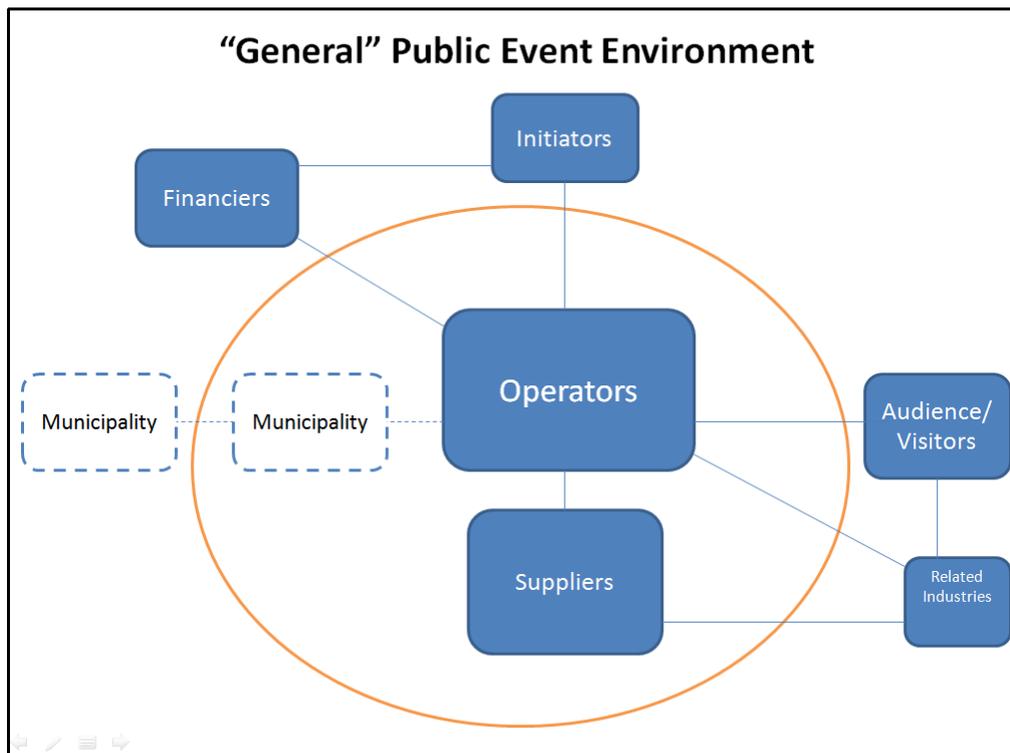


Chart 3.2 The general public event environment

The Operator

Operator is the term for the event organizer, event organization or the event foundation, because this function is not only executed by the event manager (Verhaar, 2004). The operator is at the heart of the public event sector and responsible for the planning and execution of the event. Crucial aspect in this domain is the communication with all stakeholders involved. The core activities of an operator can be divided into: planning, production, financing, programming and communication of the event. It depends on the size of the event how many people are responsible for these tasks. This can be people from inside the organization or from external sources.

The Suppliers

The suppliers in this model are almost equal to the suppliers in the model of Verhaar (2004). However, this model also includes distributors. Distributors *supply* the service of distributing the tickets, flyers and posters etc. The suppliers are all the parties supplying products and services to support the event organizers. It ranges from content like artists and musicians, to hardware like fences and stages. In the chart a line connects the supplier with the 'related industries'. This line shows that some of the suppliers do not work strictly in the event sector but also supply in other sectors. For example, a free-lancer employed as marketer at an event operator can also work as a marketer at a corporate business.

The Municipality

The municipality is involved in the event sector, either in providing permits or with "stimulating" activities like, advice, initiation, subsidy provision and coordination. Verhaar(2004) refers in his model to the government only for the law and regulations or as the law-enforcer. However most of these tasks are looked after by the municipalities and the role of the municipality in most cases goes far beyond those two activities. To get a general view on the structure of governance in different

municipalities, the situation in the bigger cities of the Netherlands is briefly investigated. Some cities support their event sector by an existing department of the municipality. For example, Groningen Centraal Meldpunt Evenementen, CME⁴) and The Hague (Evenementendesk⁵) both have marketing department with an event desk.

Other cities chose to establish an external foundation where the core business is focused on events. Rotterdam (more explicitly described in the next paragraph) and Eindhoven (Stichting City Dynamiek Eindhoven⁶) have taken this approach. In Amsterdam they established a central department, where both the stimulation and the provision of permits are coordinated⁷. Some municipalities, especially the smaller ones, don't have a policy to support the event sector.

The provision of permits is generally executed by an existing municipal department (Rotterdam, Utrecht⁸, Groningen, The Hague and Eindhoven). In this case the municipal department cannot be counted to the event sector. But only as a participant in the wider environment, because its core business is not focused on events.

In general there are four ways a municipality can contribute to the event environment. These 4 categories are represented in the "general" model by the dashed lines. The reason for the dashed lines has to do with the implementation of the governance structure of the municipality towards events.

The governance differs per municipality, in some cases it is part of the event sector and sometimes it is operative in the wider environment of the event sector. This is best explained by the four main situations:

1. The municipality solely provides permits and does not provide "stimulation" therefore only operative in the wider event environment (represented by the block outside the circle of the public event sector).
2. An existing department is responsible for the event policy. For example the marketing or city development department has the task to look after the co-ordination and stimulation. This department is not part of sector, because its main activities are in another sector (represented by the block outside the event sector).
3. One individual foundation with its core business focusing on the event sector providing services like, subsidy (stimulation), advice and co-ordination. This department is part of the event sector (represented by the block inside the event sector). Another department is responsible for the provision of permits (represented by the block outside the event sector).
4. One central department is responsible for permit provision and stimulation in the event sector. In this situation the department is certainly part of the event sector (represented by the block inside the event sector).

All these differences in governance towards the event sector can be explained by the historical context of the city's events, the type of events and the desired objectives with these events. A view is given on the possible compositions of municipalities' involvement in the event sector. Probably more situations and other structures will exist. However, it is not in the scope of this research to fully

⁴ <http://gemeente.groningen.nl/evenementen/feest-of-evenement-organiseren>

⁵ <http://www.denhaagmarketing.com/over-ons/evenementendesk/62>

⁶ <http://www.citydynamiek.nl/>

⁷ <http://biodata.asp4all.nl/andreas/2009/09012f97806a2f38/09012f97806a2f38.html>

⁸ <http://www.utrecht.nl/smartsite.dws?id=225162>

represent this subject. In the recommendation at the end of this thesis further research will be suggested. Next, the parties in the wider environment will be described, starting with the initiator.

The Initiator

Literally *initiator* means: ‘a person or thing that initiates something’⁹. This category is to show that someone or something originally comes up with the idea to organize an event. The initiator can be a single person, a company, a municipality or even locations operators or suppliers. In most cases the initiative is acquired by the ‘operator’ over the years.

The Financier

The financier is an important actor providing a large part of the income sources necessary for a public event. This party is defined according the definition given by Verhaar (2004) including: banks, funds, subsidies and sponsors.

Audience/ Visitors

These are the audience/visitors that attend the events, spend money on tickets, food, drinks, shopping and transportation, thus providing the city with economic strength. When the visitors’ expenditure can be considered as contributory to the economy will be described later in chapter 4.

Related Industries

The related industries have a connection mainly through the visitors’ spending. Through their expenditure on food, drinks, hotel stays, use of transportation and visits to other tourists spots the connection is established. However, the operator and the suppliers (cited earlier) have connections to these industries as well, for example when a combination of a ticket with a hotel night is offered. Examples of these related industries are tourism, hospitality and the cultural sector.

The environment

The environment covers the conditions that affect the behavior and development of the event sector: the tangible and intangible conditions of the event business environment. The environment includes law and regulation, safety issues, award ceremonies, magazines, unions and education institutes.

As described earlier, the different approaches of the municipalities towards the event sector have a big impact on the structure of this sector. To get a more specific view on the general model, we suggest a thorough further research on this topic. This research focuses on Rotterdam therefore it is not in the scope of this thesis to elaborate further on this matter. The next paragraph provides a model of the event sector in Rotterdam.

3.5 The structure of the public event environment in Rotterdam

Rotterdam has a long history of events, illustrated in the introduction of this thesis. It also has a specific policy towards the events and the event sector, shortly described in this paragraph. Together

⁹ <http://www.oxforddictionaries.com>

these aspects determine for a great deal the shape of the event sector. This paragraph adjusts the general mode specifically suit the situation in Rotterdam.

3.5.1 The event policy in Rotterdam

Rotterdam is seen as an event city. The last 20 years have had an important contribution to get Rotterdam where it is. In order to co-ordinate the event policy, two foundations were established in 1993: Rotterdam Topsport (sport events) and Rotterdam Festivals (other events). These two foundations are arm-length departments, which mean that they are closely related to the municipality but have the authority to make fast and individual decisions. They provide more than just co-ordination, the foundations also: stimulate, initiate, consult and sharpen the event sector in Rotterdam.

Rotterdam Topsport is supported from the Sports Department and Rotterdam Festivals is supported from the Culture Department. Every year a budget of around 4 million euro is available to support the events in Rotterdam. For occasional large (special) events, there is another additional budget of 2 million euro per year and for ad-hoc mega events the municipality has an extra budget available. For example during the Grand Depart of the Tour the France this was around 11 million euro.



Chart 3.3 The structure of the Rotterdam arm-length departments

These associations make a coherent policy towards the event program in the city of Rotterdam. Rotterdam Festivals for example, developed a policy to combine the positive aspects of events, such as image enhancing, improving quality of life and celebrating the identity of the city, with its residents and typical physical aspects of the city. Their strategy is called “Deeper into the City, further into the world”, a policy where the initiative of event organizers, the needs of residents and the ‘characteristics’ of the city are represented (see chart).

The fact that the municipality is so consciously using events for the improvement of Rotterdam makes it an important party in the event sector. This prominent role influences the shape of the model.



Chart 3.4 The event policy of Rotterdam

3.5.2 Model for the event sector in Rotterdam

Because the municipality of Rotterdam has developed a well-established policy approach, we adjust the general model to suit the situation in Rotterdam. In Rotterdam, the stimulation and coordination is done by independent foundations, the arm-length departments. The provision of permits is done by a department directly part of the municipality (Directie Veiligheid). The municipality operates therefore in and outside the event sector (chart 3.5)

The arm-length departments – Rotterdam TopSport & Rotterdam Festivals

Rotterdam was the first municipality of the Netherlands to introduce separate departments for the governance of the event sector. This makes the model unique for Rotterdam. They are considered part of the public event sector. The departments are responsible for different tasks specifically dedicated to the public events of Rotterdam like, advise, coordination, financing, initiation and stimulation. This is represented by a block within the event sector

Municipality – Management Security (Directie Veiligheid)

The provision of permits in Rotterdam is done by the “Directie Veiligheid” a department of the municipality of Rotterdam. Its main task is to make Rotterdam a safer place to live. One of their tasks is to provide this safety during events. This department clearly is not part of the event sector, but operates in the wider environment. The security aspect in the Rotterdam event sector is an important aspect, partly because of a negative experience in the past. This situation is represented by a smaller block outside the sector

Public Event Environment Rotterdam

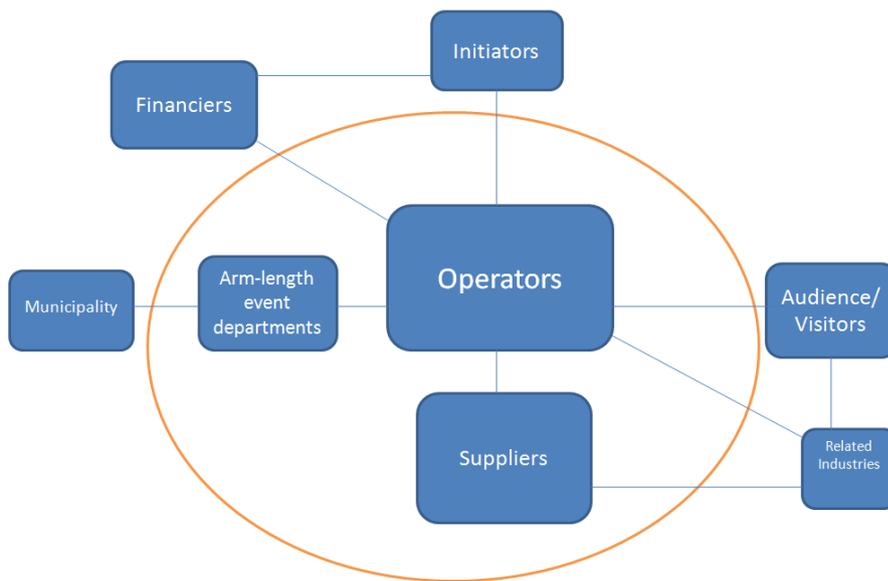


Chart 3.5 The public event environment of Rotterdam

3.6 Conclusion

The diffuse character of the sector makes it hard to provide a clear answer on the question “what is the public event sector?” We started with the core stakeholders of an event, the *provider*, the *target group*, the *location operator*, the *commission party*, the *financier*, the *supplier* and the *indirect involved stakeholder*. An introduction for discussing the event environment, which could be separated into the “event branch” as the core of the sector and the “close related parties”, according to the chart of Verhaar(2004). All the involved parties have been discussed; most important were the event organizer or organization (operator) and the suppliers. The event organizer actually plans and produces the events. The suppliers supply the crucial products and services.

This first part of the chapter formed the base for the description of the event sector in “general”. It identified the general players in the event sector. To create a general model we had to adjust the model of Verhaar (2004) with the perspective of an event manager into a model applicable to the *event sector*. A substantial difference is the involvement of the municipality. The role the government (municipality) played according to Verhaar (2004) is purely focused on the law and regulation. However, the role of the municipality is often more important – and bigger – than that. We have investigated the event policies of a number of cities. The results showed that almost every municipality differs in their governance towards events.. This can be explained by the historical context, the value of the event for the city and the local character of the events. The difference in governance made the creation of a general model difficult. However, four possible situations have been distinguished on which a model is formed (chart 3.2). The core of the sector is in this model formed by the *operator*, the *suppliers* and the *municipality*. The wider environment of the event consists of the audience, the financier, the initiator and the related industries. The environment also captures tangible and intangible factors that have effect on or were developed from the event business like, magazines, education institutions and laws and regulations.

Considering the fact that this thesis is focusing on the public event sector in Rotterdam, we adjusted the general model to specifically address to the situation in Rotterdam. Rotterdam has a long history with events and the policy towards events is determining for the sector in this city. Rotterdam is, both with Rotterdam Festivals and Rotterdam Topsport, pioneer in the event environment.

4. What is the most appropriate method for measuring economic contribution in this sector?

This chapter will provide a literature review on methods to measure the economic contribution of an event (industry) to the (local) economy. First an introduction is given on the subject. Then the 'input-output' method will be elaborated, followed by 'economic impact study' method and third the method called 'mapping' will be discussed. In the end a summary will be provided.

4.1 Introduction

As previously visualized the public event industry is a complex sector. In order to successfully measure its economic impact, this chapter elaborates on the most common methods available. Determining the economic contribution of a region, of a sector and more recently of an event has been conducted in many cases to provide the support needed for (political) decisions. This economic contribution can be measured in different ways. The three most applied methods are: the classic 'input-output' model, with varieties especially developed for events, the 'economic impact study' and the youngest method, 'mapping'. These methods are described respectively in this chapter.

First, the input-output (I-O) model is frequently used in academic research in order to determine the economic power of countries, regions and cities. It is mainly used to determine economical relations between different sectors of a national economy or between sectors of different economies.

Second, the 'economic impact study' (EIS), often used to determine the contribution of events on the (local) economy (Langen & Garcia, 2009; SQW & TNS, 2005; Crompton et al., 2001; Chougley & Montes, 2011; Bond, 2008; Crompton and McKay, 1994). EIS is mainly used to measure the tourism industry, a sector with similar need for evidence on the impact of this sector on the (local) economy.

Third, mapping is the most recent method and widely used in the creative industry (Higgs and Cunningham, 2008; Pratt, 2004; Jorgoni, 2007; Higgs et al, 2007; Houghton, 1999; DCMS, 1998 & 2001). Mapping is used in order to systematically collect economic data on a sector. The comparable characteristics of the creative industry and the event sector, both the sectors are complex and dynamic with many related activities and industries. This may make mapping a possible method determining the economic strength of the event sector. The methods will be more explicitly discussed below.

4.2 The Input-Output Model

This model is optimized by the economist Wassily Leontief (1905-1999), and therefore often referred to as the Leontief Input-Output model. The model was initially developed to determine the interdependencies between branches, industries or regions of different countries (ten Raa, 2009). When the usefulness of the model was experienced, it was also used to determine the economic

relations within a country between regions, branches or industries. Input-output models divided the economy of the research area into sectors and construct a matrix to investigate it.

Later, it was also used to measure the economic impact of events. Programs as IMPLAN (USA) and STEAM (UK) were specifically developed to measure the contribution of event on the economy. *IMPLAN* is an input-output modeling system which offers a robust set of tools to efficiently model any economic impact. The system is mainly used in the USA (Crompton et al., 2001). *STEAM* is an advantage input-output model and is often referred to as a spreadsheet model. Instead of only focusing on the exogenous demand, based on visitor's surveys, the STEAM model also includes supply-side data on bed stock and occupancy rates (Bond, 2008; Raymond, 2010).

How is data collected

Data collection for the I-O analysis is seen as extensive. It is mostly done by private companies, using programs like IMPLAN and STEAM providing the necessary tools and equipment to measure the economic contribution.

Points of attention

The point of attention which is mostly referred to is the enormous data requirement of this method. Several authors, including Vaughan et al. (2000) and Hodur and Leistriz (2006), find the requirements prohibitive. Another sound of criticism is the use of perfectly elastic supply of inputs and constant prices in the models (Hodur and Leistriz, 2006). It is seen as *"impractical or to expensive"* (Bond, 2008)

4.3 The Economic Impact Study

Economic impact can be defined as the net economic change to a host economy, more specific the contribution made to the economy's output, income, employment (Crompton et al., 2001; SQW&TNS, 2005). This is done to better understand the role of an event in a wider economy and to demonstrate that economic returns will exceed its investment, especially in less prosperous times. Crompton & McKay (1994) used a metaphor of Archer (1973) to explain the context of an impact study, it nicely illustrates the method: *"the injection of outside money can be linked to the ripples set up in a pool if more water is poured into the system. The pool represents the economy and the additional water symbolizes extra spending by the outside visitors. The ripples show the spread of money through the economy. Some of the money is spent by visitors' leaks out of the city's economic system to pay taxes to, or buy goods and service from, entities outside the city. Only those dollars remaining within the host community after leakage has taken place to constitute the net economic gain"*. In short, it is telling that it investigates the effect of a "new" euro brought into a (local) economy. Archer (1973) uses a pool to describe the influence of new money coming into the (local) economy. Not all the new money can be seen as additional, thus the "ripple" effect says that some of the money is spend again and again in the host economy and some is not. The more "new" money stays in the economy, the stronger the economy.

In the event industry this method is widely applied by organizers, funding parties and municipalities. Since the number of event is growing the interest in the impact studies has grown as well. First the focus was solely on the economic impact, mentioning the other aspects but never investigating the

specific aspects. In most recent studies more attention is given to a variety of aspects like, social, cultural, political, physical environmental aspects (Chougley & Montes, 2011; Langen & Garcia, 2009). This demonstrates a shift in the field of impact studies. Nevertheless this chapter focuses on the methodology of an economic impact study. This methodology does not only provide numbers of revenue, employment and income, but is often used to appoint to other aspects of interest to organizers and policymakers, like visitors profile and visitors perception. An example of an objective of an impact study taken from the SQW&TNS study (2005) states three objectives:

1. Identify and quantify the full economic impact of each Festival on Edinburgh, Lothian and Scotland, including the number of jobs created and supported.
2. Develop a profile of the audience for each of the festivals, and for all the Festivals as a whole.
3. Obtain consumer perceptions of the festivals from both local residents and visitors.

This research is clearly extending the “normal” range of activities adding aspects like, audience profile and consumer perception. An impact study can therefore be quite extended however there will always remain interest in the economic benefits (Chougley & Montes, 2011; Langen & Garcia, 2009; SQW&TNS, 2005; Crompton & McKay, 1994; Crompton et al., 2001).

What is measured

Most of the reviewed studies measure the expenditure of the visitors to determine the impact of events to the (local) economy. Cited in the introduction the economic impact is measured by the contribution made to economy’s income, output and employment. The most comprehensive model is designed by SQW&TNS (2005) who did an economic impact study on Edinburgh’s Festivals deriving four different expenditures:

1. Spectator or Audience expenditure
2. Journalist and media expenditure
3. Performers expenditure
4. Festival Organizers expenditure

Summarized in a model for calculating economic impact (figure 4.1)

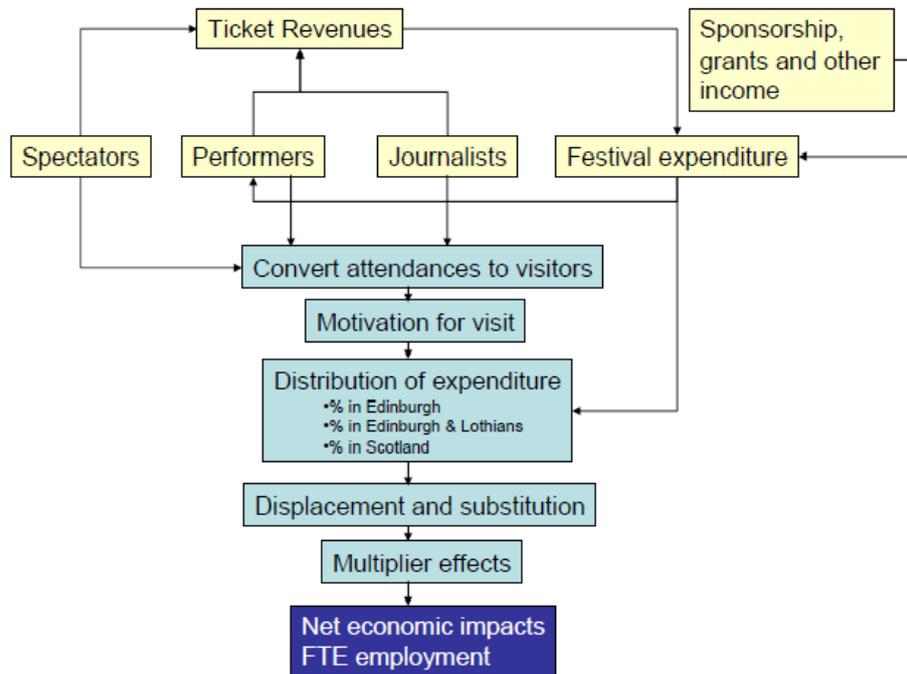


Figure 2.1 The Flow of expenditure from the four strands of economic impact (SQW&tns, 2005)

The model shows the four strands where the economic impact is derived from: spectators, performers, journalists and festival expenditure and the links between them. In each strand data is collected at the individual festivals, more events occurred at the same time, in order to calculate the total economic impact. Out of these strands the process of deriving economic impact is illustrated, taking in consideration the “points of attention” (see below) and the multiplier effects.

Multiplier effects

When the data is collected, the most common approach is to determine the direct, indirect and induced contribution (Langen&Garcia, 2009; Crompton & McKay, 1994). The **direct** contribution is measured by their initial expenditure of visitors/audience, in this case of a festival, on food, drinks, transportation, accommodation and the like. The **indirect** contribution is the effect that comes from the subsequent rounds of economic activity from the initial expenditure of the visitors. The **induced** contribution refers to the increased economic activity generated by local consumption due to increase in wages and salaries (Crompton & McKay, 1994). The three effects together contribute to the economic impact. See figure 4.2 for the process illustrated.

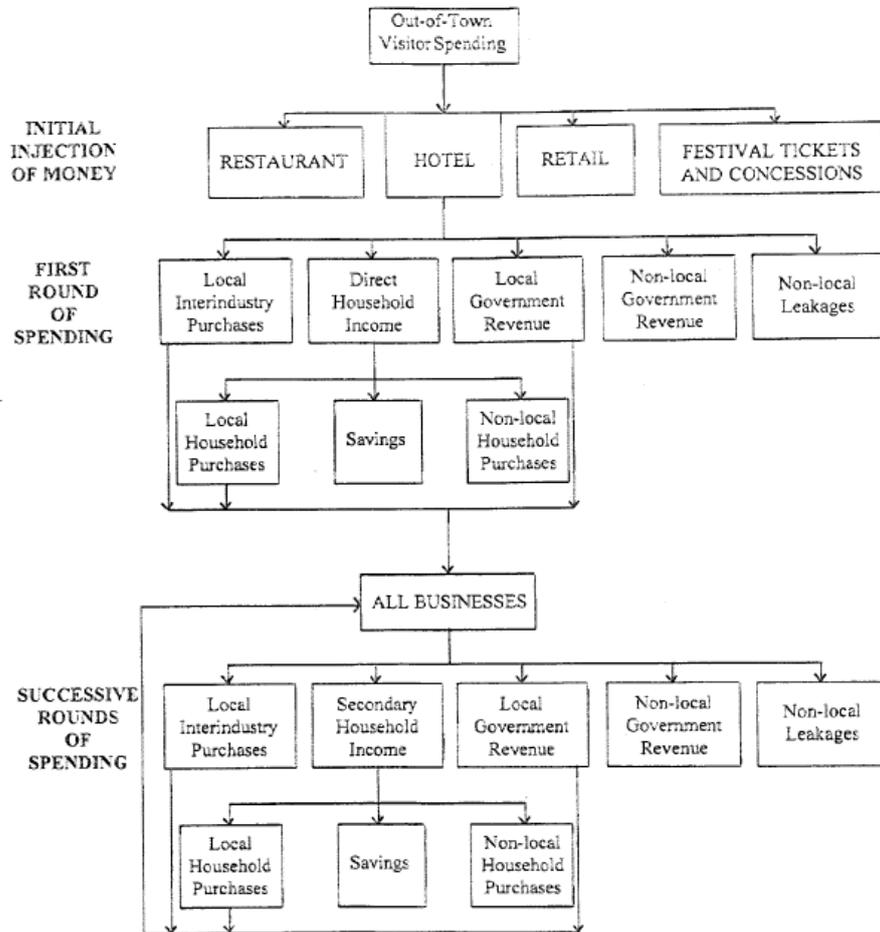


Figure 1. The multiplier process.

Figure 2.2 The multiplier process (Crompton, 1994)

These three effects are calculated with multipliers. Some multipliers are especially calculated for the specific research, some researchers use generalized multipliers mostly taken from a tourism research. It is beyond the scope of this research to describe the multiplier process in detail. However for a short description it is best to cite Crompton & McKay (1994) who explains the way multipliers are used in economic impact analyses: *“the multiplier concept is a central component of economic impact analyses. It recognizes that when visitors to an event spend money in a community, their initial direct expenditure stimulates economic activity and creates additional business turnover, employment, household income and government revenue in the host community”*. Three main multipliers (Crompton et al., 2001; SQW&TNS, 2005; Crompton & McKay, 1994) are used to calculate the wider multiplier effects:

1. Sales / Output multiplier

- Measures the direct, indirect and induced effect of an extra unit of visitor spending on economic activity within a host community.

2. Income multiplier

- Measures the direct, indirect and induced effect of an extra unit of visitor spending on the changes which may result in level of household incomes in the host community.

3. Employment multiplier

- Represents the change in employment generated by the new expenditure (extra unit of visitor spending).

With these multipliers the wider effects can be calculated (SQW&TNS, 2005):

- **Supplier effect**
 - An increase in sales in a business will require that business to purchase more supplies – “knock-on effect” (beneficial for suppliers in the local economy)
- **Income effect**
 - An increase in sales in a business will usually lead either to an increase in employment or an increase in income for those already employed. (probably the increased income will be spend locally)

The use of these multipliers can vary, resulting in different outcomes. The comments and guides for the use of multipliers will be given in the section, ‘points of attention’. But first, how is data collected?

How data is collected

Data for an impact study can be collected by a variety of methods like (SQW&TNS, 2005; Langen & Garcia, 2009)

- Quantitative Research
 - Detailed Visitors surveys
 - Web surveys of performers, delegates and journalists
- Qualitative research
 - Interviews at hotels within city center
 - Stakeholders depth interviews
- External Quantitative research
 - Box office data
 - Desk research (previous economic impact studies)

Points of attention

The method of economic impact study has several points of attention. This research method is not an exact process therefore the numbers should be interpreted with care to avoid misleading information (undervaluing, overstating). Most of the remarks are regarding the data collection and the use of multipliers.

Double counting

To avoid double counting, visitors that should have visited the hosting city anyway when there were not any events in the city. Therefore the survey determines the main motivation for the trip and takes into account:

- To what extent does an events influence a visitors' decision to visit the city hosting the event?
 - Time-switchers: people who were planning a visit to the hosting city, but changed the timing of their visit due to the event.
 - Casuals: people who were already in the city and visited the event instead of doing something else in the city.

Exclude local residents

Expenditure by those who reside in the community do not represent the circulation of new money. For example: it could be that twenty euro spent by a local family at an event would likely be 20 euro's less spent on movie tickets elsewhere in the city)

Crowding Out

If the activities (events) don't add to the output or employment (non-additionally), the risk of crowding out exists. Crowding out occurs when the increase in government expenditure results in a matching decrease of private investment.

Types of non-additionality:

- Leakage effects
 - Generated benefits which are not captured by the spatial area of the hosting city.
- Deadweight
 - Refer to generate income that would have happened anyway (see double counting)
- Displacement effect
 - When activities generate benefits at the expense of activity elsewhere. An example in national context: generated benefit for Rotterdam could mean a loss for Delft or The Hague.
 - Displacement can also refer to the fact that visitors that are attracted by the events, displace other visitors that are not willing to mingle with these particular crowds or cannot find accommodation in that particular time period (Crompton & McKay, 1994). Referred to by SQW&TNS (2005) as substitution: Festivals cause businesses to service one market rather than another. (All hotels may be full with festival visitors, which means there is no place for 'regular' tourists)

Use of sales (output) rather than income multipliers

In many researches the direct visitor spending is multiplied by the sales multiplier and refers to the product as an economic impact for the host community. The sales multiplier is used as an indicator for business growth and is likely to be of interest for the residents. Another point of attention is the fact that the highest income effect does not necessarily come from the highest increase in sales. A high sales number of labor intensive goods creates a higher increase in income when compared to non-labor-intensive goods (Crompton & McKay, 1994; Crompton et al. 2001).

Misinterpretation of employment multipliers

The employment multiplier, explained above, assumes that all contemporary employed people are fully occupied; this indicates that when external visitor spending increases, the level of employment has to increase as well. This may give a misleading impression because it is not likely that businesses would hire employees, to reach the temporary peak in demand for employment (a few days in the

case of an event or festival). Rather they would use the existing employees for a longer period. (Crompton & McKay, 1994; Crompton et al., 2001)

Negative impacts

Events and event visitors will create extra demand on the service of the hosting city. In most of the researches the negative impact that come along with its visitors are not considered. Impacts like, congestion, use of police and fire men, garbage collection, traffic control and noise are not taken into consideration when applying an economic impact analysis. These elements should be part of the analysis, because an impact study should be an analysis of all the costs and benefits of an event (Crompton & McKay, 1994).

4.4 Mapping

Mapping studies have been conducted for different reasons. However a number of general reasons can be distinguished. Most of the studies are conducted to generate evidential base for policymakers. These studies measure the contribution an industry's contribution to the (local) economy (Higgs and Cunningham, 2008; Pratt, 2004; Jorgoni, 2007; Higgs et al, 2008). Mapping studies provide vital information for the communication of key concepts and data. They systematically collect data about industries that are hard to classify and document statistically. For example, by generating a model that provides insight in the relationships between products, services, markets and industries (Houghton, 1999). One of the first mapping studies was performed by the department for Culture, Media and Sport in the UK and was called "the Creative Industry Mapping document" (DCMS, 1998 & 2001). The objective of their mapping study was: *"To raise the awareness of the industries, the contribution they made to the economy and the issues they faced"*. In this way visualizing the facets of an industry and bring it to the attention of policymakers and professionals. Mapping studies are also used to analyze future potential of a sector (Jorgoni, 2007). Jorgoni describes three main objectives (based on his mapping study on the creative industry in Albania):

1. Identify and categorize accordingly the creative industries that already exist in the country;
2. Assess the capacities and identify needs and problems;
3. Assess the impact the creative industries have on the country's economy and its development.

In short, mapping is determining the economic size and (economic) characteristics of an industry. However the size and impact can be measured in different ways. In the next section the most common steps in a mapping study will be discussed.

What is measured

Different approaches have been used to map an industry. In most of the studies aspects as total revenue, employment, output and export are covered (DCMS, 2001; Marlet & Poort, 2005; Higgs and Cunningham, 2008; Higgs et al., 2008). As mentioned before, mapping studies consist of more than just a study on the size of an economy. They also provide a visualization of the industry and identify the firm's characteristics by researching the core activities, related activities and related industries. A

quote from DCMS (2001) about a sector alike, the ‘performing arts’ sector, illustrates this nicely: “We also recognize the close economic relationships with other sector such as tourism, hospitality, museum and galleries, heritage and sport”. Individual researches add economic aspects like, potential growth (Jorgoni, 2007), innovation and international ranking (Marlet & Poort, 2005).

How data is collected

The data collection on the assessment of economic contribution by mapping has been done by various measurement frameworks and quantitative techniques. The following techniques are used to collect the data (Higgs et al., 2008):

- Quantitative surveys, to conduct specific data on revenue, employment, output and export balance.
 - Visitors surveys
 - Business surveys
- Qualitative surveys, to identify the interrelations, core activities, related activities and related industries
 - Depth interviews with stakeholders (organizers, security, catering, light&sound, advisors)
- External quantitative data, to support the quantitative survey and strengthen the results of the mapping study.
 - Data resource organizations

Points of attention

In general, mapping studies are used for policy decisions. Robust methodology is therefore necessary and vital. Wrong conclusions could harm a sector in two ways; undervaluing and overstating. Undervaluing an industry would have a negative impact on the support it gets from policymakers or in attracting external investment. No less damaging is overstating an industry’s impact; this will eventually lead to loss of credibility and can trigger the same consequences as undervaluing (Higgs et al., 2008)

4. 5 Conclusion

This chapter elaborates on three methods determining the economic contribution: the input-output analysis; the economic impact analysis; and the mapping study. The input-output analysis is initially used to measure the independence of industries or region between two countries. Later, it was modified to also measure the contribution of events. An economic impact study, determines the economic impact – output, income and employment – of an event to the (local) economy. This study uses multipliers to determine the successive rounds of economic impact. Mapping is focused on the characteristics, size and relations within an industry.

Objective of this chapter is to determine which method is best suitable for this research to use in order to measure the economic contribution of the public event sector in Rotterdam.

I-O analysis is as seen before mainly to discover the interdependency of two or more sectors. Although it is useful to know how the relationship of the event sector is with its related industries, it requires datasets on expenditure and revenue from all the sectors involved in the wider environment. This data collection process is not within the scope of this research, not in time nor in financial means.

An economic impact study is either mainly focused on one event or on more events. It is valuable to conduct such a study when it is desired to know what the impact of one (or more) events is on the economy of the hosting region. However, this study is aimed at determining the economic contribution of a sector: the public event sector, thus focusing more on the supply side of the events instead of the demand side (visitors). The data collection of an economic impact study is mainly conducted through an extensive visitors survey. To conduct the surveys ourselves was not possible within the time scope of this thesis. Although some of these audience surveys have already been conducted, they do not provide the right information for a good economic impact study.

Another obstacle to use an impact study is the use of multipliers. The development of multipliers is a expensive and time consuming task, a too big task for this research. The use of general multipliers from another research is allowed, however we choose not to consider the necessary assumptions and less reliable results.

The method of research used in the continuation of this thesis will be the third discussed method: **mapping**. This method suits best the objective of this research, “to determine the economic contribution of the public event sector”. In this method the focus is on the industry and not on the output of the industry (in this case the events). Although the economic contribution of the events’ visitors will not be neglected –the output is represented in the results – the primary focus is on the characteristics of the sector itself.

Mapping is primarily used in the creative industry, as cited in this chapter. The reason for this method are the characteristics of the creative industry like, diffuse and a lot of related industries. These characteristics do not suit to the standard classification methods of determining economic activity. The event sector and the creative industry have corresponding characteristics. This makes this method the most appropriate method measuring the economic contribution in this thesis.

Another reason to conduct a mapping study is the available data. Rotterdam Festivals has a database providing useful information on the events. The information includes numbers on revenue source and cost division. Also, this research will conduct a survey with event managers in Rotterdam. In total about, 36 respondents will participate in the survey. This survey is better executable compared to the time consuming visitors survey. This has to be conducted individually for each event in order to present an aggregated economic impact. Therefore it is not in the scope of this research to collect sufficient data and provide a reliable study, with either an I-O analysis or an economic impact study. Besides, both the impact study and the I-O method have their assumptions, like perfect elastic supply, multiplier interpretation and this research chooses to eliminate those errors by choosing the mapping method. Mapping will not provide the best explanatory data on the economic contribution of this sector to the economy of Rotterdam. However it will give a indication of the sector’s financial state. A positive incidental of a mapping study is that it can include analysis on the (economic) characteristics of this sector as well. This will result in an insight in the income sources, cost structure and business relations in the sector.

5. Methodology

This chapter will set a frame for the research area. It explains the definitions used in this research. It sets out how the data is collected and processed.

5.1 Introduction

Before describing the method of research we refer to the research question:

“How can we measure the economic contribution of the public event sector to the (local) economy and what is the contribution to the Rotterdam economy”.

The research question shows two parts. The first part is to discover what method is best suitable for investigating the public event sector in this research. The first part is answered in the previous chapter and resulted in the method: mapping. The second part is a descriptive case study considering Rotterdam. This part will be started within this chapter by considering what is a mapping study and setting a clear framework on the research area.

5.2 Content of this mapping study

Mapping is a relative young way for measuring a sector's contribution to the economy. Different studies have been called a mapping study (Higgs and Cunningham, 2008; Pratt, 2004; Jorgoni, 2007; Higgs et al, 2008). In short, mapping is: *“collecting as much information about an industry or sector in a systematic way”*. Still a quite broad definition, therefore it is important to clarify what this research considers a mapping study. This paragraph will show which information is included in this mapping study. All the aspects will briefly be described. The terms used in this paragraph are elaborated in paragraph 5.4.

General information

This part of the study will present information on: the type of organization; the location of the head-quarter; and the number of events organized by the operators in Rotterdam.

The scope of the sector

The scope of the sector will be represented by: the revenue of the operators; the level of employment; the number of volunteers; the number of trainees; the number of visitors; the division of the events' visitors; and finally the visitors' expenditure.

Income sources

In this section the dependence on different income sources (subsidy, funds, sponsors and own income) and the involvement of private parties are presented.

Cost Structure

The cost structure provides information on how the budget is spent. In general the budget is divided over: organization costs; program costs; production costs; and marketing & communication costs. Special attention is given to production costs, which is dividable into four main costs: technical equipment; catering; event facilities; and security.

Geographical orientation suppliers

To investigate the local character of the event sector a section on the geographical orientation of the suppliers of goods and service (free-lancers) is included.

5.3 The research frame

To conduct this research we had to define the public event sector. In detail the public event sector is discussed in chapter 3. Here we settle for a broad definition of the public event sector:

“A collective term for the companies, organizations and foundations involved in: planning, executing and contributing to a public event”.

This definition is to general to conduct research on. Therefore a sample is drawn out of the organizations behind the public events. To determine which operators to include in the sample the IFEA application list is taken as a guideline (appendix 1). This application list represents most of the public events of the season 2009-2010, with more than 5000 visitors. The list excluded events like congresses, conferences and concerts, public events that were neither in the field of Rotterdam Festivals nor Rotterdam Topsport. In order to get the organizations that contribute (most) to the Rotterdam economy, this research added three more ‘limitations’, one on the *area*, one on whether it was a *recurring event* and finally “special” events were excluded in order to present yearly numbers. Next, these limitations are discussed separately.

Size (number of visitors)

The events were first selected on the number of visitors; a limit was set on at least 5000 visitors. In accordance with the IFEA application, composed the city of Rotterdam in 2010 (appendix 2). This resulted in 59 events from 53 different organizations.

Area

The organizations included in this research needed to have an department within the municipality of Rotterdam. The municipality of Rotterdam is home to about 600.000 people and consists of 14 districts: Centrum, Charlois, Delfshaven, Feijenoord, Hilligersberg-Schiebroek, Hoek van Holland, Hoogvliet, IJsselmonde, Kralingen-Crooswijck, Noord, Overschie, Pernis, Prins Alexander and Rozenburg.

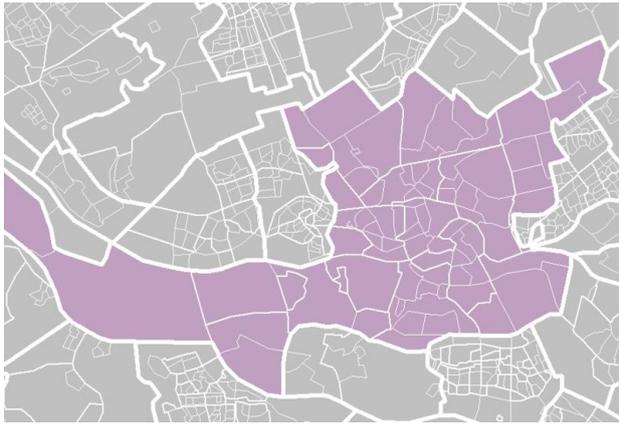


Figure 5.1 The municipality of Rotterdam

This limitation on area excluded the organizations that were not from the municipality of Rotterdam. In order to be sure that the revenue generated comes mostly to benefit of the region of Rotterdam.

Yearly- or two yearly recurring

All the respondents approached organize a yearly- or two yearly recurring event. This way the annual contribution could be presented.

Exclusion of specific type of events

According to the list of the IFEA application subscribed by the municipality of Rotterdam, the concerts, congresses and conferences were already excluded. This research also excluded the “special” events (take place only once) and the *themed years* (take place every other year). For example in 2010 the Grand Depart (start of the Tour de France) was responsible for 800.000 visitors. Examples of themed years are Rotterdam City of Architecture (2007), European Culture Capital (2001) and European Youth Capital (Your World, 2009)

The limitations of the research frame resulted in **43 events** organized by **34 organizations** (see appendix 3).

5.4 Terms and definitions

This research will make assumptions on the size, the structure and characteristics of the public event sector. In order to be clear what the results indicate it is necessary to determine certain definitions. This sub-chapter aims at doing this as much as possible.

Revenue

The total amount of turn-over of the events realized by operators in the event sector.

Organization Costs

Costs resulted from employees and personnel like management salaries, production salaries, cost of hiring free-lancers, but also desk administration and housing costs.

Programming Costs

Costs made on the content of the event, including musicians, actors, singers, movies and cost on transportation and establishment. General dividable into;

- Technical equipment, e.g. light and sound
- Catering, e.g. food and drinks
- Event facilities, e.g. stages and fences
- Security, e.g. people ensuring security on the event

Production Costs

All the cost made on materials that are necessary for the event, mostly costs made on products and services to support the program of the event.

M & C Costs

Costs made on publicity and marketing & communication like: distribution, web-site, flyers and alike.

Visitors

The number of visitors is represented by the numbers as documented by the city of Rotterdam. These numbers are based on the list of the IFEA application list (appendix 2). On recommendation of people working in the event sector a margin of 20% is applied on the yearly visitors. They claim that in general the numbers of the visitors are exaggerated. This margin is implemented to eliminate this error. The two-yearly events are counted for 50%, to present an average over two years.

Visitors' expenditure

The visitors' expenditure is the (total) amounts spend by the visitors to events in the season of 2009-2010. Based on average spending (for calculations see data processing).

Visitors Origin

The origin in this case refers to the home-living environment of the visitor. Divided into three categories:

1. Regional: included visitors from the area Rotterdam Rijnmond
2. National: visitors outside the region of Rotterdam Rijnmond inside the borders of the Netherlands.
3. International: Visitors from outside the Netherlands.

Rotterdam Rijnmond - An area hosting 28 different municipalities with Rotterdam as central point and an estimated number of residents of 1,2 million.

5.5 Data Collection

This research has collected using three methods. The main source of information was a quantitative questionnaire conducted under event organizers or organizations in Rotterdam, some of the data collected in this survey can be underpinned by data from a database of Rotterdam Festivals, the second method. Prior thereto an interview was held with six event organizers to get better understanding of the event sector. Below the three methods are elaborated.

Qualitative Research – Exploratory interview with event organizers

The quality research consists of an interview with six well established organizers in Rotterdam to determine the structure and characteristics of the event sector. It was used to capture the most crucial parts of the event sector in Rotterdam. The questions can be found in appendix 19 and the information gathered within these interviews are incorporated in chapter 3.

Quantitative research – Survey in the sector

The base of this research is a survey held under the organizations in Rotterdam, within the extent of this research. This survey was conducted to determine the size, cost division and the division in income sources of the sector. Other aspects investigated were the relation between the organizations and their suppliers as well as with their financiers.

The questionnaire consists of 5 parts. The first part consist of general questions, like name, the place of the head quarter, type of organization and the number of events they organize. The second part focuses on the scope of the sector, the revenue, the employees, the free-lancers, the volunteers and the trainees. Not included in the survey questions, but present in the presented data are visitors numbers and visitors expenditure. Third part on the cost division of an event with specific focus on the productions costs. Forth part are questions on the financing of an event and the last part is about the business relations and the business area focus. The questionnaire can be found in appendix 20.

Desk research – External data

Most of the desk research is conducted within the database from Rotterdam Festivals. This database keeps record of all the applications and granted commissions. It gives information on costs and financing according to the division used in the survey. This way it acts as a back-up for the questions asked in the survey. Also the application for the IFEA event award generated a lot of information, like the events with more than 5000 visitors, along with visitors numbers, but also number of volunteers and hours worked (appendix 14 – 17).

Also part of this research method is the collection of information on visitors' expenditure. Rotterdam Festival conducted several visitors surveys in 2008- 2009, to determine the reason for visiting an event, the origin of the visitor, the feeling towards the festival and how much they spent on average at the event. (Meijer & vd Velde, 2009a, Meijer & vd Velde, 2009b; Blauw Research, 2008) The latter mentioned average expenditure provided the number for the calculation of the average expenditure and therefore the total expenditure done in a year by the visitors.

5.6 Data processing

Data from the survey (appendix 5 – 13)

The data from the survey is processed to systematically present the event sector of Rotterdam. In order to do this as complete as possible, the answers to the questions are combined to create aggregated numbers of the event sector. All the tables of calculation are presented in the appendix. In order to understand the tables properly some terms will shortly be described:

- Range: the answer ranges from the questionnaire.
- Fixed: the derived numbers (out of the ranges) to proceed on with the calculations.
- Number: the number of respondents who answered the question with this range.
- Fxd*Nbr: the multiplication of the fixed number and the number of respondents for that range.
- Percentage: the percentage of respondents who answered the question with that range.

From the aggregated numbers we subtracted the following information:

- Average
- Median
- Maximum
- Minimum

The data processing enabled this research to present the scope and characteristics as presented in chapter six.

Data from the spreadsheets (appendix 14 – 17)

The information of the database from Rotterdam Festivals is presented in spreadsheets. Where the average distribution is calculated. This calculation provides a background for the information gathered through the survey.

Weighted average visitors expenditure (appendix 4)

The calculation of the weighted average expenditure of an event visitor is based on previous research. Three audience researches had been conducted in the year of 2009 (Meijer & v.d. Velde, 2009a, Meijer & v.d. Velde, 2009b; Blauw Research, 2008). These researches provided the average expenditure of visitors on nine events (a clear overview is given in the appendix 4). These numbers have been multiplied with the estimated number of visitors to provide the weighted average expenditure. The nine events included in this calculation provide a good representation of both the larger and smaller events held in Rotterdam. With a range from 10,25 euro expenditure to 78,50 euro expenditure.

Pearson Correlation (appendix 18)

To see whether the variables in the survey correlated a Pearson's correlation test is conducted in the statistics program SPSS. The results of this test are presented and discussed at the end of chapter 6.

This chapter has provided a frame for this mapping study. It described the terms and definitions, the way the data is collected and processed. The research limitations of the data will be discussed in the end of this research. The results of the survey and database will be presented in the next chapter.

6. Mapping the event sector of Rotterdam

This chapter presents the data obtained from the event sector in Rotterdam. Most of the data is conducted through a survey. The survey is divided into different sub categories. This chapter will use a format according to the survey and describes the event sector of Rotterdam in five paragraphs; General information (6.2); the scope of the sector (6.3); the income sources of public events (6.4), Cost structure and production costs (6.5) and a chapter on the origin of the business partners and employees (6.6). To see whether the answers in the survey correlated as Pearson test is conducted in (6.7). In the end a summary will be given (6.8).

6.1 Introduction

Rotterdam has embraced the positive externalities events have to offer. Previously discussed is the level of importance of events to the city life of a city. This second part of the research is to determine the economic contribution. A complete economic impact study was not within the scope of this research, thus the method mapping is used to present an economic view. This research is aware that a focus solely on the economic impact of an event doesn't do justice to the total effects of the events on the hosting city, like the social, cultural, environmental and educational aspects. However, a research like this has never been conducted within the city of Rotterdam and especially here it should be present (for the relevance see chapter one, introduction). Therefore this chapter will present economic data on the public event sector, giving an indication of its economic contribution to the economy of Rotterdam.

6.2 General information

The first part of the survey was aimed at collecting general information on the sector. The first question in the survey was to give an indication on how the event organizers/organizations perceive themselves, whether they see themselves operating in the event sector or not. Out of the respondents 84% consider themselves as part of the event sector. This could indicate that the other respondents (16%) consider themselves more related to another sector or industry. This probably is the sector the operators used to be categorized in, the cultural sector. Or the respondents do not yet see the event sector as a distinguished sector.

Type of organization

In the public event sector there is one dominant organization type: the foundation. **Eighty-four percent (84%)** of the operators mentioned that they are a foundation. Typical about this type of organization is that they have no profit maximization goal. This indicates that making profit is not a primary goal of a large majority of the sector. Other types of organizations are the private companies (9 %) and sole proprietorship (3%). The private companies account for a large part of the total revenue in the event sector, this will be presented in paragraph 6.3.

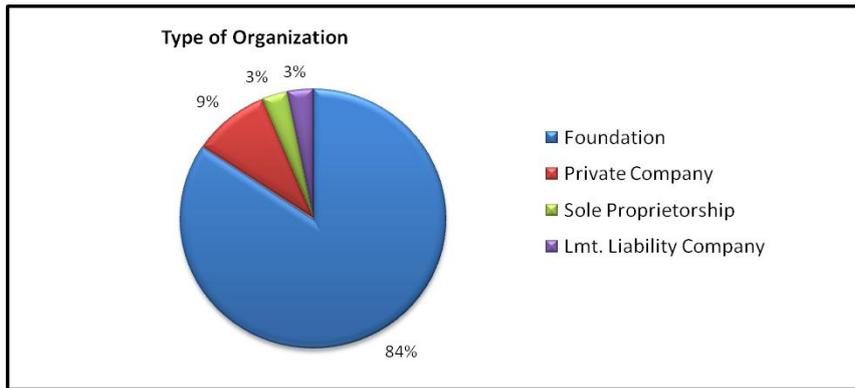


Chart 6.1 Type of organization

Location of the headquarter

A large amount (91%) of the respondents has their head-quarter within the municipality of Rotterdam. This could indicate that Rotterdam is a good environment to locate your event organization. More importantly it shows that a large majority of the turn-over stays within the economy of Rotterdam. The other 9% of the respondents have a department within Rotterdam, but their head-quarter outside the region of Rotterdam Rijnmond.

Number of events

The amount of events organized by organizations in Rotterdam is around the 90 per year. On average organizations organize 3 events per year. A majority of the respondents (operators) organize just one event (53%). All the private companies organize more than five events. They cover a big share of the 47% of the operators organizing more than one event. This partly explains the large proportion in the total revenue. The operators in the event sector do not only organize events in Rotterdam, 25 % of the operators have assignments outside the region of Rotterdam. The cities in which they operate are; Amsterdam, Amersfoort, Utrecht and Groningen. Some just refer to the rest of the Netherlands. In general it shows that the most of the sector (75%) focuses on Rotterdam for their business.

Export of events

Not included in the survey, but interesting to cite is the level of export in this sector. This subject is discussed in the interviews with the operators. In the past not a lot of export existed within this sector, nowadays some events cross the world as a brand. Examples from Rotterdam are North Sea Jazz festival and the International Film Festival Rotterdam (IFFR) which are organized on Curacao and the Bavaria City Race in Moscow. The best example of an event organized in another country is: Sensation White, an event organized around the world. Sensation White is organized in countries like, Australia, Brazil, Belgium, Chile, Denmark, Hungary, Portugal, Spain, Ukraine, Russia and Great Britain. These are not even all the countries where this event takes place, a true example of export in the event sector.

6.3 The scope of the public event sector Rotterdam

The scope of the sector in this research is presented by the turnover of the event organizations in Rotterdam, the employment including volunteers and trainees, the number of visitors attracted by the events held within the city and the visitors expenditure (for a clear representation see the conclusion).

Revenue

The total revenue of the public event sector in Rotterdam as indicated from the 44 events in Rotterdam is estimated at **37,4 million euro**. This revenue is calculated from the yearly and 2-yearly recurring events with more than 5000 visitors (appendix 8).

This total revenue does not include the “special” events (discussed in chapter 2) like, Grand Depart 2010 (revenue of 15 million euro). Nor does it include *themed years*, occurring every two year with every year another theme. Examples of themed years are: Culture Capital of Europe (2001, 23,6 million euro); Year of Water (2003, 1,4 million euro); Year of Sports and “KOORTS” (fever) (2005, 1,2 million euro); Year of Architecture (2007, 3,8 million euro) and European Youth Capital (2009, 15 million euro). On average these themed years give a 2-yearly input in the event sector of 9 million euro.

The average revenue of an operator in the public event sector in Rotterdam is 1,2 million euro. The median is considerable lower with 250.000 euro. The difference between the mean and median is explained by a few big events (outliers) that increase the estimated average. In chart 6.2 the distribution of the revenues is presented, most of the events have a budget under the 1 million (70%). The most occurring revenue ranges are the categories of 50.000 – 100.000 euro (19%) and 500.000 – 1.000.000 euro (19 %). Discussed is the division of the types of organizations, the correlation with the revenue is quite striking. Together the private companies cover 44% of the total revenue. This means that 56 % of the revenue is represented by the foundations. Note, all the private companies organize more than one event.

The level of revenue is also consulted in the database of Rotterdam Festivals. Both data sets are surprisingly equal. The level of revenue according to the dataset is 36,4 million. This gives an absolute difference of 700.000 and a relative difference of about 2%. Considering that the questions in the survey contained ranges of revenue (see chart 6.2) it shows that the operators are quite aware of their finances.

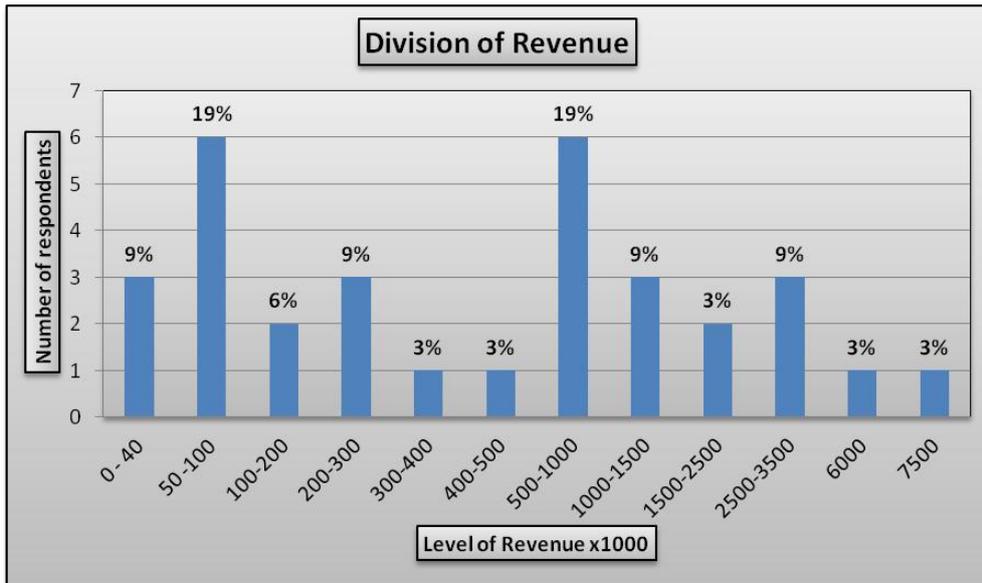


Chart 6.2 The distribution of revenue

Employment – Event Organizers and Event Organizations

The employment number of full time employees at the operators (event organizers or organizations) is relatively low. According to the results from this survey there are 229 people working in the sector and the average number of employees per organization is 8. A majority of the operators have between the 1 and 5 full time employees (63%). This demonstrates that the sector consists mainly of small companies. These companies hire (a high number of) temporary employees, illustrated by the data presented on employment growth.

In chapter 5 is cited that the employment in this sector is also represented by the people working as free-lancers. These free-lancers are represented by the suppliers or the related industries. It was not possible to gather data on all the suppliers and related industries separately. To present a view on the sector's employment, a question was included to indicate the level of employment growth during the event or during the preparation of the event.

From the results in the survey it shows that the level of employees grows about 8,5 times the normal level. In total there are around 4400 people working during or in the preparation of the event. Most of the temporary employees are working during the events, in Rotterdam this is especially during the summer, which can be classified as "season" jobs. However, this number also represents the people working in the preparations towards the event, for example in the marketing & communication department. There are also situations where an external employee is working during the whole period of planning and execution.

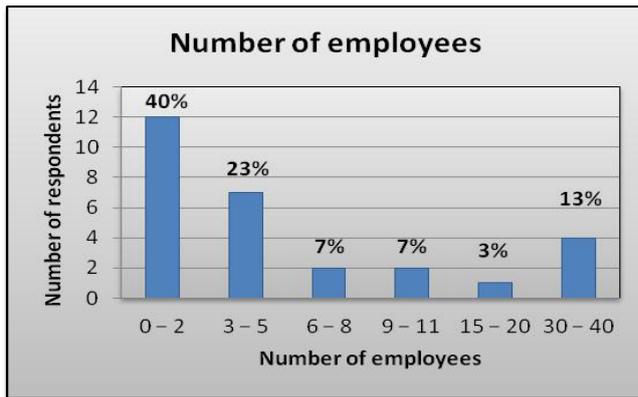


Chart 6.3 Number of employees

Employment – Arm-length Departments

There are two departments within Rotterdam closely involved in the event sector, Rotterdam Festivals and Rotterdam Topsport. These departments contribute to the number of employees working in the event sector. Rotterdam Festivals has in total 20 people working full time, of which 9 specifically dedicated to the event sector. Rotterdam Topsport has 15 people working full-time of which 4 are especially dedicated to the event sector. The other employees can be categorized in the group that supports the event sector. In the case of Rotterdam Festivals they also support the cultural sector and in the case of Rotterdam Topsport they support the sports sector.

Volunteers

Volunteers are important in the labor intensive event sector. Often it is not in the budget to pay for all the labor-force. Around 4500 people are working as volunteers. Some of these volunteers only work during the events some have full-time jobs organizing it. About 58 % of the volunteers work between 0 – 20 hours for the event organization, this will mostly be during the event. The average number of working hours per volunteer is around the 40 hours. This shows a great commitment of the city towards the event sector.

Trainees

The sector is open to trainees and every year on average 80 students find a place to increase their work experience or to perform their final traineeship. On average 3 trainees are working at an event organization, positive for both the event sector and for the city. Valuable knowledge is transmitted this way and enables Rotterdam to stay on top of the event industry.

Number of visitors

The scope of the event sector is also represented by the number of visitors the events attract during the year. In total the events in Rotterdam attract an estimated **3,7 million visitors** a year, according to the IFEA application list 2009-2010 (appendix 2). If we only count the visitors from events organized by operators from Rotterdam (aligned with the research scope of this paper) the amount of visitors is 4,3 million. This shows that the events organized by operators from Rotterdam attract large amounts of visitors.

In both cases these are visitors to the yearly or two-yearly recurring events. This excludes the number of visitors to the “special” events, like Grand Depart (2010) with an estimated number of visitors at 800.000. But also excludes the visitors attracted by the *themed years* like European Youth Capital (2009), with an estimated number of visitors of 531.000.

Division of visitors according to origin

The dataset of Rotterdam Festivals provided information on the origin of the visitors. A big majority of the visitors are from the region Rotterdam Rijnmond, on average about **65 %**. Close to **30 %** is national and only **5%** of the visitors are international. A more precise division of regional visitors is not available. However, a large part of the visitors will be from outside the municipality. The expenditure of these visitors can also be considered “new” money into the municipality of Rotterdam. However, no further assumptions on this matter can be made. The results also show that the positive benefits from events are mostly experienced by the residents of Rotterdam Rijnmond (65%).

Visitors’ expenditure

This thesis has used data from other researches (see chapter 5) to determine the average expenditure of a visitor in Rotterdam. The average spent amount is 52 euro (appendix C). This number generates an estimated total visitors’ expenditure of **190 million euro** (appendix C). Especially the expenditure of national and international visitors is valuable. This expenditure symbolizes “new” money into the (local) economy. The total visitors’ expenditure from national and international visitors is around 67 million euro.

Note, this is a mapping study, showing an indication on the scope of the event sector. The expenditure presented cannot be considered as “economic impact”. It is included to show that the sector contributes more to the economy than the 37 million euro revenue.

Two examples of events in Rotterdam have been investigated individually are North Sea Jazz and Grand Depart 2010. Both researched take a different approach and although not according to the regulations of an impact study described in chapter 4 it gives an indication of the impact of the events when measured individually. North Sea Jazz has a *net* contribution to the city of 2 million each year, according to an intensive (social) cost – benefit analysis (Hendrik Beerda Consultancy). The Grand Départ 2010, 20,8 million. This research accurately determined what visitors were additional and excluded time-switchers and casuals (see chapter 4). However it did not make use of multipliers to calculate the indirect and induced economic effects (Vogelaar, 2010). These two researches give an indication of the ‘true’ impact of events.

Scope of the sector (year numbers, reference year 2009)			
Est. Revenue	37,4 million		
Est. Employment	242 full time	4400 season	
Est. Volunteers	4250 (40 hrs)		
Est. Visitors	3,7 million		
	Regional	National	International
Origin visitors	65%	30%	5%
Est. Visitors' Expenditure	190 million		

Table 6.1 Scope of the event sector

The table gives an overview of the sector. This is the economic contribution of the event sector to the economy of Rotterdam. The employment level during the events grows tremendously and the commitment of the city (volunteers) is high.

Benchmark

To put this economic contribution in a perspective, two references are provided. First, with the event sector of Edinburgh and secondly within the economy of Rotterdam. Within the economy of Rotterdam a comparison is made with the creative industry, the health care sector and the port industry. Although these references do not provide a full event status of Rotterdam, it gives an indication of the scope of the Rotterdam event sector.

Edinburgh is capital of Scotland and also known for its festivals. This city was awarded event city of the world 2010 in the category under 500.000 residents. Edinburgh takes a different approach in offering the events. It chooses to organize all the events in one period (one month during summertime). In contrary to Rotterdam, who has chosen to provide events throughout the whole summer and even some in the rest of the year. A research carried out in Edinburgh presents an estimated the visitors' expenditure of 221 million pounds (252 million euro) by 2.7 million visitors (Chougley & Montes, 2011). Compare these numbers to the estimated figures in this research. We see two noticeable aspects, the total visitors expenditure in Rotterdam is lower (190 million euro) and the number of visitors is higher (3,7 million). This means that on average the visitors to Edinburgh spend more. This difference is probably due to different visiting behavior of the visitors. The visitors to Edinburgh's festivals will quicker choose to visit the city during a period of a couple of days. They can be considered tourist, visiting a place more than 24 hours and therefore on average spending more. In Rotterdam because the festival offer is scattered over the year, the visitors will probably make a day-visit, officially referred to as excursionist, visiting a place less than 24 hours (Bond, 2008). Considering the differences of the cities and their event policies, the number of visitors and their expenditure seem good for Rotterdam. Especially the number of visitors each year is good, the event visitors vivify the city streets.

A comparison within the economy of Rotterdam is given by the creative industry and the two largest industries of Rotterdam, the healthcare sector and port. The gross revenue of the creative industry is

400 million euro (Manshanden et al., 2005). That the event sector has an economic contribution half of that of the creative industry seems acceptable knowing the creative industry is a collection of different sectors. These sectors are: Advertising and marketing; music and performing arts; Film, TV, radio; Software and digital content; Publishing, Architecture; Design (Higgs et al, 2007). However, what is surprising is the difference of the number of full-time employees, the creative industry 10.000 full-time employees and the event sector only 229 full-time employees. Although this research only considers the employees working at the operators, the event sector cannot be seen as large provider of jobs. Note that the event sector does provide 'season' jobs especially in the summer, which can be very important to the residents of Rotterdam.

Compared to the two largest sectors, the healthcare industry and the port, the significance of the event sector is not impressive. The healthcare industry has an estimated revenue between the 2 – 3 billion euro and the Port has a full-time job equivalent of 90.000 jobs.

Although it is not the best economic contributing sector of Rotterdam - this was never expected - the sector provides its own positive contribution and offers the city so much more, see introduction. The position of the event sector in the economy of Rotterdam can be considered a well-established "smaller" sector.

6.4 Income sources of the public event sector

In this paragraph the results are presented about the financial side of public events, more specific, from which sources the operators obtain their income. This research distinguishes four sources of income: subsidies, funds, sponsors and own income. In this research we will make a division according to source of income in order to determine the dependence of different financial means in this sector. This way the most important source of income can be indicated and if it is coherent with the desired division.

Income division of events

On average the operators state that 25 % of their financing comes from subsidies, 20% from funds, 28 % from sponsors and 27% own income, as shown in the chart below. At first sight this shows an remarkable equal division. The clearest information we get from this chart is that the sector is dependent on external parties for the most of their income (subsidies, funds and sponsors; 72%). Where the term "public event" is clearly defined in this research, we see here that it can be seen as a public good as well.

A closer look at these numbers shows a positive balance between governmental (municipal) support (25%) and private income (funds, sponsors and own income, 75%). This indicates that subsidies are only given to support the sector and not for the viability, a positive sign especially in the current market where the dependence on governmental support is decreasing. Note that the support of the municipality is not only provided by the subsidy granted but also by in-kind costs like, police and fireman deployment and the costs for cleaning afterwards the events. These costs could not be implemented in this research but shall be referred to in the limitations.

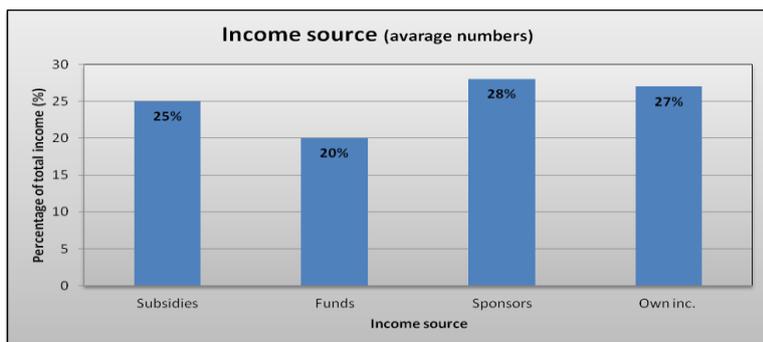


Chart 6.4 Distribution of income sources (average numbers)

Comparing subsidies with funds and sponsors, there is a ratio of respectively 25% against 48 %. This indicates that public sponsored money is less important to event organizations than private support. This ratio is a positive result, diminishing the possibility of the crowding out effect.

When we compare subsidies with funds, there is a (negative) ratio of 25% against 20%. This can be explained by the fact that private funds cover the whole of the Netherlands with their budget and most of the governmental support is from the municipality. This subsidy is directly beneficial for the municipality.

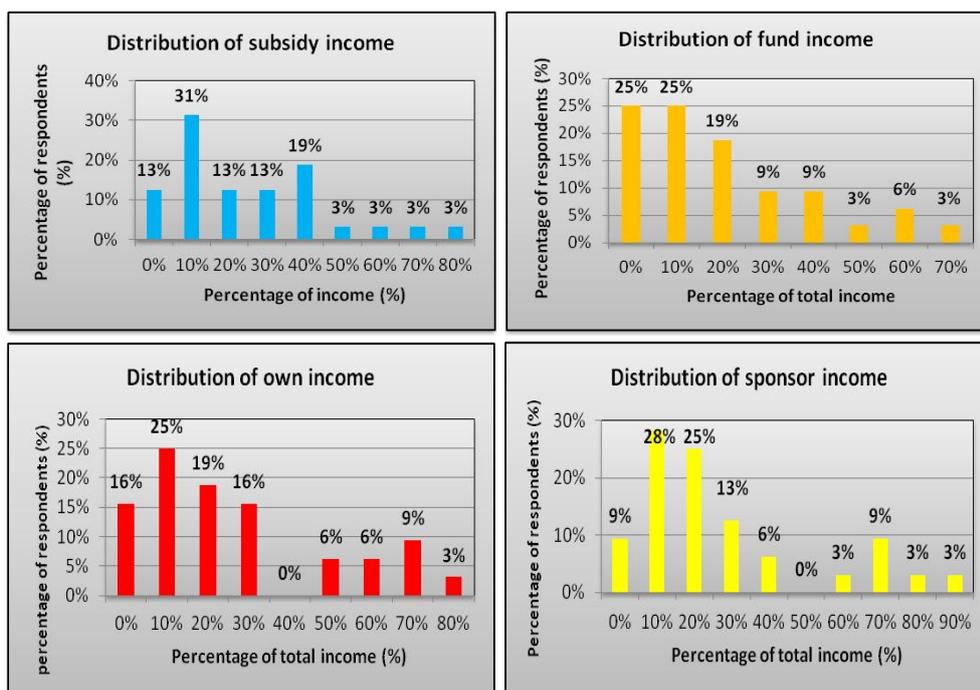


Chart 6.5 Distribution of income sources

After having discussed the average numbers of the income sources, now a closer look is taken at the distribution of the respondents considering the source of income separately (chart 6.5). It shows that operators are least dependent on funds for their income: 25% of the respondents say not to get any fund support (distribution of fund income). Most of the respondents state that they are dependent on subsidies for 10%, this shows that subsidy is mainly used as support income. In one case a respondent states that the event is dependent on governmental support (subsidy) for 80 %. This probably has to do with the social function of the event. However, it is still a strikingly high number and subsidies like this should be avoided by the government and municipality as much as possible.

Looking at the right side of the charts, upward of 50%, where the operators are dependent on this source of income for more than 50%, we see that own income (24%) and sponsors (18%) are most important. Explaining the higher average dependence on sponsors and own income, respectively 28 and 27%. Both are private income sources, positive results for the Rotterdam economy. These two sources of income have more outliers in the results, also seen in the difference between the mean and median. Both the sponsor income and own income have a larger difference between the mean and median compared to subsidy and funds (see chart below). Another fact that can be indicated from the charts is that one event is as much as 90% dependent on sponsors.

	Mean	Median
Subsidy	0,25	0,20
Funds	0,20	0,15
Sponsors	0,28	0,20
Own inc.	0,27	0,20

Table 6.2 Mean and median of the income sources

On the source of income we also consulted the database of Rotterdam Festivals. The results from analyzing the budget balance sheet show a remarkable similar outcome. Especially when you consider that the questionnaire is based on estimated numbers by the operators’ knowledge of the financial state. This shows again that the operators have good knowledge of their financial position and the results can be considered quite reliable.

The balance sheet shows that: 31 % of the financing comes from subsidies (against 25%); 26 % from funds (against 20%); 17% from sponsors (against 27%); and 26% from own income (against 27%). The only noticeable difference is the level of sponsor support, with an absolute difference of 10%. This indicates that operators estimated their dependence on sponsors is higher than the database of Rotterdam Festivals shows. This difference can be due to the fact that the balance sheets provide information on the years 2009-2010 and the operators probably answered the question according to their current situation.

Involvement of private parties from Rotterdam to the event sector

The focus of this research is on Rotterdam. In order to see whether the region of Rotterdam, besides the municipality (a large amount of the governmental support is from the municipality of Rotterdam), is involved with the event sector we asked whether the income of funds and sponsors are from parties within the Rotterdam region.

The results indicate that **45 %** of the sponsors are organizations from Rotterdam. This shows that the private sector is committed and supporting to the event sector in Rotterdam. Usually the big sponsors are multinationals, not necessary located in Rotterdam, explaining the other 55% of the sponsors. Funds from Rotterdam show a little less commitment about 30%. However, this lower number could indicate that the region of Rotterdam does not host many head-quarters of funds and there are no regional departments anymore.

6.5 Cost structure and production cost allocation of the public events in Rotterdam

Cost Structure

To analyze the costs distribution of the events, a division of four categories we made: 1) organization costs (including salaries), 2) program costs, 3) production costs, and 4) marketing & communication costs. With this division this research aims to gain insight in the way the budget is spent and to discover what this could mean to the economy of Rotterdam. On average the survey gave the following results: 20% was spend on organization costs, 32% on program costs, 32% on production costs and 16% on marketing & communication costs. Clearly showing that most of the costs, together 64%, are in program and production. This is budget spent on the content of the festival, showing that the (public) money invested in this sector mainly benefits the city’s residents or the event visitors.

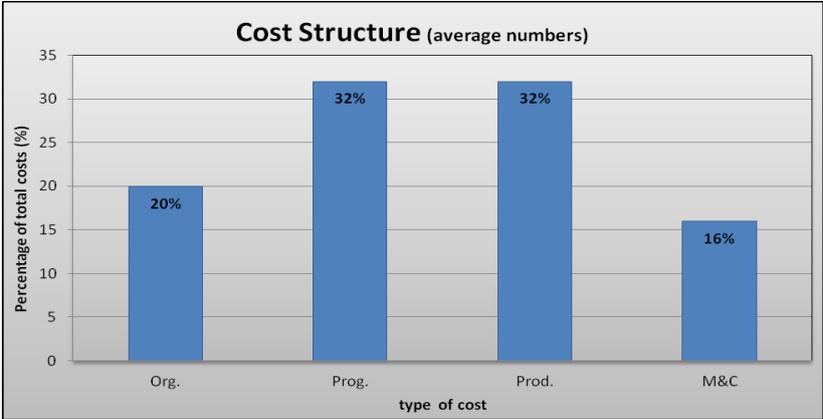
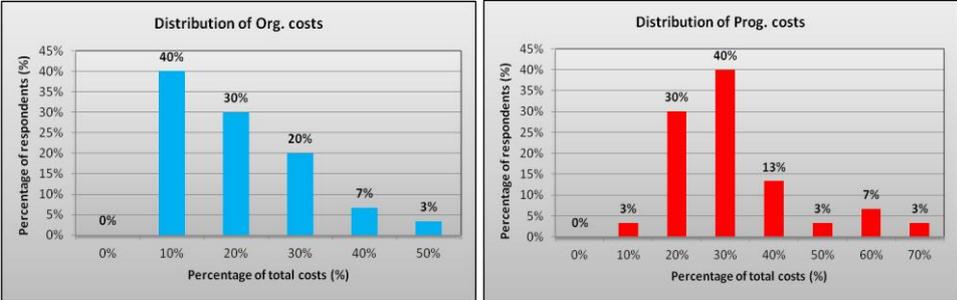


Chart 6.6 Cost Structure

In general the program costs, production costs and the marketing & communication costs represent most of the suppliers and external partners. This could say that a large part of the budget is re-invested in society or other branches, especially because 84% of the organizations are foundations which have no profit maximizing goal. In a situation where the suppliers are mainly from within the region, the sector’s expenditure benefits the local economy the most. If this situation occurs in Rotterdam is shown later in the chapter.



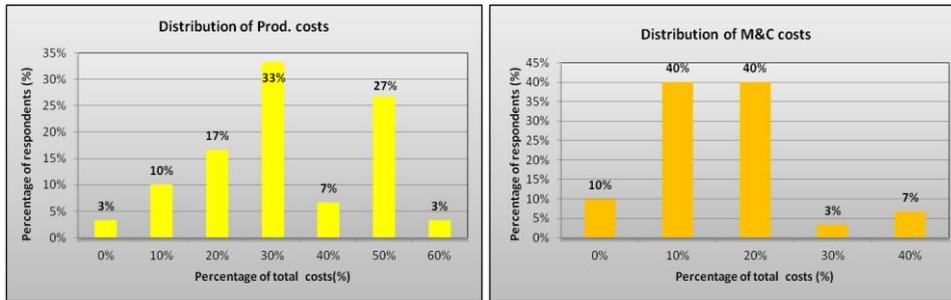


Chart 6.7 Individual cost structure

Looking at the distribution of costs separately we see that almost the half of the respondents (40%) state that 10% of their costs are organization costs. For program costs 30% of the total costs, is the biggest group of respondents. The production budget is largest at 30% as well and can count on 33% of the respondents. Finally 90% of the respondents say that their marketing and communication costs are between 0- 20 %, which is corresponding with the average 16%. Two respondents indicated that 40% of the total budget is spent on marketing and communication. This will probably be the new events, in need of high (media) exposure.

The cost structure is also consulted from the database of Rotterdam Festivals. When we compare the results from the survey with the results from the database, we see an equal division, corresponding with the results from the income sources. The only noticeable difference between the survey results and the database results, are the organization costs. The database gives an absolute difference of 10% higher compared to the survey. This indicates that the operators consider themselves earning on average 10% less of the total budget. However the overall division would still be the same, most of the budget is spent on the content of the festival (60%) and the other part to supporting categories of events (organization en M&C costs).

Production costs

We have just seen that around 30% of the budget on average is spent on production costs and because the production costs represent a large proportion of the business partners. We decided to gather more information on this specific cost. Production costs are generally dividable into four categories: 1) technical equipment, e.g. sound and light; 2) catering; 3) event facilities, e.g. fences and stages; and 4) security.

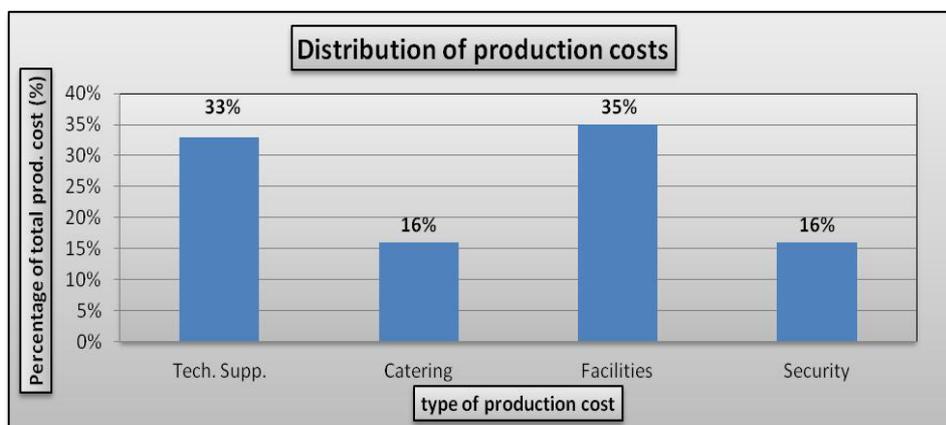


Chart 6.8 Distribution of production costs

Most of the budget of production costs is spent on technical equipment and facilities, together 68%. The other 32% is equally divided over catering and security. Considering the re-integration of money into the (local) economy, this is less contributory as expected. A majority of the money spent on production facilities, the capital intensive activities (technical equipment and facilities). Generating fewer jobs compared to when it was spent in the labor-intensive goods (catering and security). In this case the rotation of money is less than when the situation was reversed; now it ends up in a smaller group of people.

The costs for catering in general do not cover more than 30% of the production costs. Most of the respondents answered that they spent 30% of their production budget on technical equipment. Remarkable is that one event spends as much as 50 % on security of the production budget.

Economic characteristics of the event sector (average numbers)				
Income Source	Subsidies	Funds	Sponsors	Own Income
Percentage (%)	25%	20%	28%	27%
Cost Structure				
Org. Costs	Prog. Costs	Prod. Costs	M&C Costs	
Percentage (%)	20%	32%	32%	16%
Prod. costs distribution				
Tech. Equipment	Catering	Facilities	Security	
Percentage (%)	33%	16%	35%	16%

Table 6.3 Economic characteristics

6.6 Geographical orientation suppliers

In order to better understand where the business partners and employees come from, information is obtained on the origin of production costs and the origin of the external (additional) personnel. Production costs specifically represent a large part of the suppliers in the event sector, therefore a question was included asking where their suppliers of this specific production activity comes from. The same division of production costs was used as before according to: technical equipment, catering, event facilities and security. We asked whether or not the operators do business with suppliers from the region of Rotterdam, to indicate if the sector is locally orientated for its business partners.

Suppliers' orientation

On average 68% of the suppliers of technical equipment is from the region of Rotterdam Rijnmond. For catering this is on average 59%, Event facilities and security have respectively 65% and 48% on average from Rotterdam. All together the suppliers to the event sector are on average 60% from the region of Rotterdam. In general we can speak of a local orientated sector.

Out of all the respondents 42% mentioned that their suppliers of technical equipment are all from Rotterdam, about the same amount (41%) of the operators stated that their suppliers of catering are (100%) from Rotterdam.

Striking is that security has a clear distinction on the use of parties from Rotterdam, 41% says that none of their security comes from Rotterdam and 38% says that all (100%) their security comes from Rotterdam. For event facilities the biggest part (27%) says that all their facilities come from a company in Rotterdam.

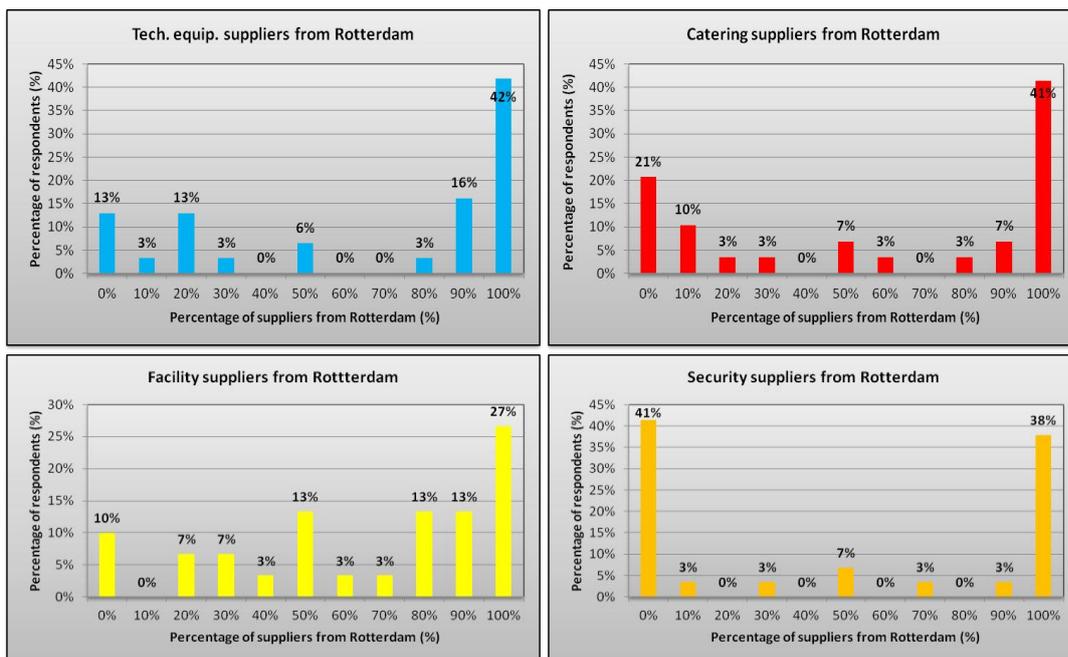


Chart 6.9 Geographical orientation suppliers

Employment orientation

The percentage of hiring external personnel from Rotterdam is corresponding with the level of average business orientation. On average 56% of the external personnel is from the region of Rotterdam Rijnmond. The biggest part (28 %) said that 80 – 100 % of the embedded personnel is from Rotterdam (chart 6.11). This shows a focus on Rotterdam for the (invulling of) jobs in the event sector.

The last question of the survey was to indicate the business “character” concerning partners and personnel of the event sector, whether they were loyal or not. The results show that 97% of the respondents stated that they do – in general – business with the same suppliers. This indicates that the number will stay the same in the subsequent years. So with an average of 60% focus on Rotterdam region, this is a positive sign.

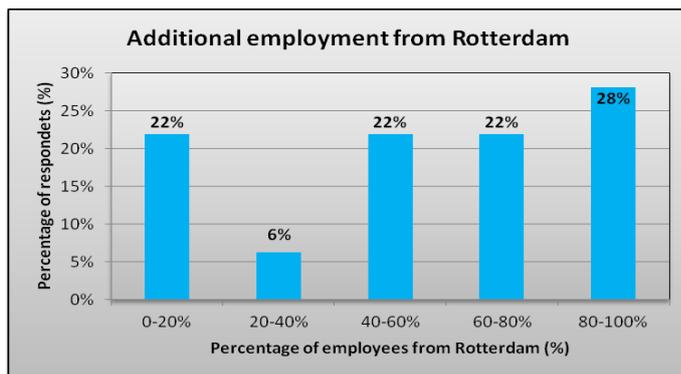


Chart 6.10 Additional employees from Rotterdam

6.7 Correlations in the surveys variables

To investigate whether there were any correlations in the variables of the survey that could contribute to the objective of this thesis; a Pearson correlation test was conducted. This method is used to measure the strength of the linear dependence between two variables. The dependence of 12 variables has been investigated (appendix 18). Out of this test 4 significant correlations were observed and will be discussed in this paragraph. An observed correlation (table 6.4) is not necessarily a causal correlation. The 4 correlations will be discussed individually.

Variable 1	Variable 2	N	Sign. level	Correlations	
Revenue	Number of volunteers	30	0.008	0.474	Positive
Revenue	Funds	30	0.007	0.482	Negative
Organisation costs	Subsidy	32	0.009	0.452	Positive
Organisation costs	Sponsors	32	0.005	0.484	Negative

Table 6.4 Pearson correlations

All the four correlations show a very high significance level, they are all significant at a 0.01 level. Looking at the correlations individually, the following assumptions can be made.

1. The level of revenue and the number of volunteers correlate positive. The observed correlation in this situation could indicate two things. One, that whenever the level of revenue is high more volunteers are working at the event. Two, the other way around it could say the more volunteers are active at an event the more revenue is generated. In this case we probably are dealing with a 'spurious relationship'. A spurious relationship is: "A coincidental statistical relation between two variables, shown to be caused by some third variable" (Babbie, 2005). In this case the third variable would be the 'size of the event. The bigger the event, the bigger the revenue and the number of volunteers.
2. The level of revenue and the amount of income out of funds correlate negative. The observed correlation indicates that when the revenue is high the dependence on funds for income source is low. The other way around it could mean that when the revenue is low the dependence of funds for income source is higher. Here funds and revenue are substitutes; more of one means less of the other.

3. Organization costs and the level of subsidy correlate positively. Out of the four correlations this one is most interesting. This correlation indicates that the level of organizations costs is higher with a higher dependence on subsidy as income source. Or the other way around that the level of subsidy is higher with higher organizations costs. The correlation could again indicate on a spurious relationship. The third variable would be “professionalism”. A more professional organization is more likely to receive a higher level of subsidies and a more professionalized organization will have higher organizations costs, due to better skilled or educated personnel.
4. The fourth correlation is between the level of organization costs and the level of sponsor income. This correlation is negative indicating that the higher the dependence on sponsorship income the lower the organizations costs are. Or the lower the organization costs the higher the dependence on the income of sponsors. Again here we have substitutes. This could indicate that the sponsor expects that a high amount of the sponsor income is spent on other costs than organization costs, like program or production costs.

The findings of these relationships do provide interesting information. However, they do not contribute to the objective of this research and are not within the scope of this thesis. These results should be further investigated and suggestions for subsequent research will be done.

6.8 Conclusion

This chapter presented the information obtained by the questionnaire conducted for this research. The data provided the opportunity to “map” the public event sector in Rotterdam. One of the objectives was to show that the economic contribution of this sector to the economy of Rotterdam is bigger than the turnover of solely the operators (37,4 million euro). A big contribution of this sector comes from the visitors’ expenditure. The visitors’ expenditure in Rotterdam is estimated on 190 million euro and generated by an estimated visitor number of 3.7 million visitors a year. This economic contribution is put in international and local perspective and although the benchmark is limited, it seems that the event sector is a well-established smaller sector in the Rotterdam economy. On the aspect of job creation it stays behind in terms of full-time jobs (229 full-time jobs). However, it does create a respectable amount of ‘season’ work, about 4400 each year, jobs that can be important to residents. Residents are also the group that is benefiting from the events the most, about 65% of the visitors is from the region of Rotterdam Rijnmond, 30% of the visitors are national and 5% of the visitors is from outside the Netherlands.

Additional to the scope of the sector the economic characteristics of the sector were investigated. The income distribution shows a positive balance between public income (25%) and private income (75%). This indicates that the dependence on public money is less than expected and the entrepreneurial skill of the sector is vital. Also most of the budget (showing from the cost structure) is spent on the content of the events, implicating that most of the budget invested benefits the visitors.

The sector also can be seen as a local orientated sector. On average 60% of the suppliers of production products or services is from the region of Rotterdam. Only security has a share of less than 50% from within the region of Rotterdam. About the same amount of the additional employees are from Rotterdam (58%).

Another characteristic of the sector is that the majority of the organizations have no profit maximization goal (84% is a foundation) and will spend most of their budget in the event or/and in related activities. Most of the head-quarters are in the Rotterdam region (91%), indicating on a healthy settle environment and with assumable most of their staff from within the region.

The correlations of the variables show interesting results especially the correlation between revenue and subsidy. It shows that with an increase in subsidy also the organization costs increase. This could indicate that more subsidies are granted to organizations that have a more professionalized structure. The higher standard of professionalism implicates higher organisation costs.

Overall this chapter provides an economic map of the event sector in Rotterdam, describes its (economic) characteristics and contribution to the economy of Rotterdam.

Chapter 7 Conclusion

The goal of this research was to retrieve the most appropriate method to measure the economic contribution of the public events sector and to what extent this sector contributes to the Rotterdam economy.

In order to reach this objective four sub-questions have been composed. The first question: “What is a public event?” was answered in chapter two. A public event should have a clear begin and end, is place fixed, consciously planned, in principle accessible to all audience and by a specific form (type) trying to realize an objective. Next step was to visualize the public event sector, in particular the sector in Rotterdam. The sector differs per city due to the role of the municipality. A general model was compiled which provides a “helicopter view” on the sector and distinguishes its core actors: *the operator*, *the suppliers* and the – interchangeable – role of *the municipality*. In Rotterdam two arm-length departments, Rotterdam Topsport and Rotterdam Festivals, define the sector for a large part. To present the situation in Rotterdam, the model is adjusted according to the specific characteristics of the Rotterdam event sector.

The characteristics of this sector (diffuse and many related industries) and the time, scope and monetary limitation of this research made *mapping* the most appropriate method to determine the economic contribution. Mapping is a method where data of a sector is collected systematically to presents its scope and its (economic) characteristics. The other methods described, the ‘input-output analysis’ and the ‘economic impact study’, were not sufficient and had extensive data requirements and mainly focused on a single event.

The second part of the research was a mapping study conducted in the public event sector of Rotterdam. A research frame was established based on the IFEA application list, with limitations on: size, level of frequency, area and type of event. This resulted in a research sample of 34 operators in the municipality of Rotterdam. The main source of data was a survey conducted among these operators. The results showed three main findings on the event sector in Rotterdam.

Vital part of the Rotterdam economy

The public event sector of Rotterdam is a vital and well-established sector. Its economic contribution is best presented by: the estimated revenue, *37,4 million euro*; the estimated number of visitors: *3,7 million*; and the estimated visitors’ expenditure: *190 million euro*. This contribution is put in an economic perspective, compared to the event sector of Edinburgh and three sectors from Rotterdam, shows that the sector is not the biggest but contributes a fair share. The entrepreneurial characteristic of this sector is shown by the results on income source, on average 75% of the income sources comes from private sources (funds, sponsors and own income). The sector also provides a good amount *season work*, about 4000 jobs a year. However, it stays behind in providing full time jobs (242 full time jobs).

Regional orientation

Most of the findings on the (economic) characteristics of this sector show a regional focus. Sixty-five percent (65%) of the event visitors are from the region of Rotterdam. Although they do not always represent “new” money, it shows that the non-monetary benefits are mostly enjoyed by the residents of Rotterdam Rijnmond. The local character of the sector is also supported by the results on the geographical orientation of the suppliers, on average 60% of the suppliers are from the region

Rotterdam Rijnmond. About the same amount of the additional employees are also from within the region of Rotterdam (58%). Finally 91% states to have a head-quarter in the municipality of Rotterdam, this could indicate that Rotterdam is a good environment to establish an event organisation.

Content driven

The cost structure of the events shows a focus on the content of the event on average 64 % is spent on the content, equally divided over program and production. In most of the cases organisations do not have a profit maximisation goal (84%) what also indicates that the content of the event is a incentive for most of the organisations.

Policy implications

This thesis has presented an economic view on the public event sector of Rotterdam. Studies like these are common in the field of public support, to understand the contribution of a sector to the (local) economy and to provide evidential base for (political) decisions. Although the economic aspect is always of great importance in this kind of situations, the wider impact of event should not be forgotten. Events provide a range of other contributions like, providing new cultural experience, enhance the identity of a city, make residents feel proud about their city, and establishes cultural cohesion. All together events can enhance the city's life. This sector should not be supported solely for the economic returns; in that case money is better spent in other industries. Instead focus on the *total* impact events have to offer.

Chapter 8 Recommendations

This research has only briefly investigated the bigger municipalities' event policies. An intensive and qualitative research to the role of the municipality in the event sector should be conducted. In this way the different roles of the municipality can be determined and a general "best" model for the involvement of the municipality should be provided.

This mapping study can be used as a guide for undertaking a "true" economic impact of the event sector. All the events in Rotterdam should be investigated individually, according to the requirements of an economic impact study. By using the rights multipliers the direct, indirect and induced effects on the economy should be determined.

A research especially dedicated to investigate the correlations between the variables discussed in this research. A bigger research sample should be gathered (national), to investigate the interesting correlations like: income and different types of costs; type of organization and costs and type of event and costs.

The maximum of provided subsidy should be 25% of the total income for every event. Most of the time it is even less, 57% is between 0-20 % subsidies, a positive sign. However, in some cases the granted subsidy is far above the 25% (up to 80%!). These situations should be eliminated in order to support more events.

More economic benefit (visitors' expenditure) is not necessary realized by more visitors. The amount of visitors in Rotterdam is well-established. An investigation to the means of increasing visitors' average expenditure and the attraction of more national and international visitors would be beneficial for the city.

In order to strengthen and increase the support of the city's entrepreneurs, further knowledge of the involvement of sponsors from Rotterdam (currently 45%) should be obtained.

This research has focused on the economic contribution of public events and the event sector. Currently more investigations are conducted to the full contribution of events. A so called 360* investigation would do more justice to the overall impact of events (social, cultural, educational, economic and environmental)

Research limitations

Estimated numbers based on ranges

The data presented in this research are estimated number based on ranges given in the questionnaire. The way in which the questions are asked, according to ranges, makes the answers generally combinable, but increases the chance on less accurate data.

Reference Year

The reference year used for this research is 2009. However not all the data on this year was present. In some cases data for the year 2010 is used to complete the dataset (this is also due to some two-yearly events). The survey had the possibility to answer with revenue numbers from a more recent year (2010 or 2011), in 4 cases operators presented revenue numbers on 2010, in three cases on 2011. In cases where the budget would differ proportionally from its previous year, this can result in an incorrect image of the revenue numbers.

Average visitors' expenditure

The calculation of the average expenditure is based on 9 events. However, considering the total number of event this covers just 15% of the total offer. This influences the estimation, even when both high and low expenditure events - equally divided - are implemented in the research.

Number of visitors

Visitor numbers are reflected accurately if tickets were sold for the event, such as the Rotterdam Film Festival and North Sea Jazz. Visitor numbers of free events in public spaces have been estimated, always based on the estimates of official agencies such as the police (Rotterdam Festivals, 2010).

Difference in format of balance sheet per organization

In order to underpin the results from the survey, the information available in the data at Rotterdam Festivals is compared. However not every event organization uses the same format for their balance sheet. This can generate a wrong view of the cost division. This limitation is as much as possible eliminated consulting the annual reports of the events.

Number of operators

The framework of this research excludes types of public events and public events with less than 5000 visitors. These events are just as good part of the event sector. This research therefore really maps the top level of the event sector in Rotterdam.

Not considering negative externalities

A mapping study does not consider the negative externalities of the event like, congestion, traffic, garbage and noise. These costs are considered for example in an input-output study.

Mapping study is an indication

A mapping study is an indication, based on available existing data and general surveys. To do hard statements a study with more accuracy should be conducted.

Calculation of average numbers

The average numbers in this research are calculated from percentages. The calculation of averages in percentages is disputable. However, because all the questions were in percentage it was not possible to calculate the average in another way.

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Appendix

Appendix 1 The list of the IFEA award application

The IFEA award application list (2009- 2010)			
1	ABN AMRO Tennis Toernooi		
2	Rotterdam 2010	31	Roparun
3	Fortis Marathon Rotterdam	32	Day of Romantic Music
4	Ortel Summercarnival	33	Camping Rotterdam
5	Bavaria City Racing	34	RTL viert de zomer
6	YOUR WORLD Summerevents	35	Nationale Nieuwjaarsnacht 2009-2010
7	World Port Days	36	Circusstad
8	Fit For Free Dance Parade	37	The international choice of the Schouwburg
9	Rotterdam 2010	38	OVG Veerhavenconcert 2010
10	North Sea Jazz	39	Wednesday Night Skate
11	North Sea Round Town	40	Vicks Blue Winterplein Rotterdam 2009/2010
12	C.H.I.O.	41	Bevrijdingsfestival Zuid-Holland
13	(WPT)	42	Kermis
14	WK Judo	43	Sprookjesparade
15	Wk Skate	44	Pleinbioscoop Rotterdam
16	Maritiem Kwartier (Havenfestival)	45	Ortel Nelson Mandela Festival
17	International Shantifestival	46	Verborgen Tuinen
18	Gergiev Festival Rotterdam	47	Het Bruisende Park aan de Rotte
19	Art Rotterdam	48	R'Uitmarkt
20	Motel Mozaïque	49	YOUR WORLD City Games
21	2009 World Cup Baseball	50	The Rotterdam Museum Night
22	Object Rotterdam	51	Summer Sundays
23	Rotterdam	52	Redsound
24	Poetry International Festival	53	China Cultural Festival Rotterdam
25	Ortel Dunya Festival	54	Parfum de BoemBoem
26	Metropolis Festival	55	Rotterdamse Oogst Festival
27	The world of Witte de With	56	Musica Republica Outdoor
28	Veronica Sunset Grooves	57	Keti Koti
29	De Parade	58	Intocht Sint Nicolaas
30	Rotterdam	59	Nacht van de Kaap

Appendix 2 Estimated number of visitor

Event	Estimated Combined Aggregate Attendance	Event	Estimated Combined Aggregate Attendance
ABN Tennis Tournament	106100	Roparun	30000
Fortis Marathon Rotterdam	900000	Day of Romantic Music	25000
Ortel Summercarnival	700000	Camping Rotterdam	20000
Bavaria City Racing	550000	Nieuwjaarsnacht	15000
World Port Days	400000	Circusstad	5500
Fit For Free Dance Parade	400000	The int.choice of the Schouwburg	7000
IFFR	353000	OVG Veerhavenconcert 2010	5000
North Sea Jazz	70000	Wednesday Night Skate	57000
North Sea Round Town	65000	Vicks Blue Winterplein	55000
C.H.I.O.	55000	Bevrijdingsfestival	40000
ENECO WPT	52000	Kermis	35000
WK Judo	26900	Sprookjesparade	30000
Wk Skate	25000	Pleinbioscoop Rotterdam	25000
Maritiem Kwartier	20000	Nelson Mandela Festival	20000
International Shantyfestival	18000	Verborgen Tuinen	20000
Gergiev Festival Rotterdam	18000	Het Bruisende Park	20000
Art Rotterdam	12500	R'Uitmarkt	15000
Motel Mozaïque	10500	The Museum Night	12500
World Cup Baseball	4815	Summer Sundays	12000
Object Rotterdam	6000	Redsound	10675
AFFR	2850	China Cultural Festival	10000
Poetry International Festival	2750	Parfum de BoemBoem	8000
Ortel Dunya Festival	225000	Rotterdamse Oogst Festival	8000
Metropolis Festival	36000	Musica Republica Outdoor	7500
The world of Witte de With	35000	Keti Koti	7500
De Parade	33000	Intocht Sint Nicolaas	7000
Wieler Zesdaagse	31046	Nacht van de Kaap	5000
Total est. visitors	4,565,036		Green = 2-yearly event
20 % margin			
Total est. visitors	3,652,029		

Appendix 3 Operators Rotterdam

nr.	Organizations (Operators)	Event (s)
1	Ahoy Rotterdam	Zesdaagse Wielrennen; ABN TT
2	Architecture Film Festival Rotterdam	Rotterdam Architecture Film Festival (RAFF)
3	Ducos Productions	Zomercarnaval; Dunya Festival
4	Stichting Philharmonic festival	Gergiev Festival Rotterdam
5	Het Havenmuseum	Maritiem Kwartier
6	Stichting Filmfestival Rotterdam	International Film Festival Rotterdam (IFFR)
7	JMR Productions	Dance Parade; Metropolis; Camping Rotterdam; R'uit Markt; Nacht w/d Kaap; BevrijdingsFestival
8	More than Life	Het Bruisende Park
9	Pacific Enterprices	Sprookje Parade
10	Rotterdam Marathon B.V.	Marathon van Rotterdam
11	Rotterdam Racing	Bavaria City Racing
12	Rotterdamse Schouwburg	Int. Keuze R'damse Schouwburg
13	EURO-PA	Musica Republica
14	Stichting Hermes	Sinterklaar intocht
15	Sticht. Buitengoed	Dag van de Romantische Muziek
16	Sticht. ShantyFestival Rotterdam	Int. Shanti Festival
17	Sticht. Motel Mozaique	Motel Mozaique
18	Sticht. Veerhaven Concert	OVG Veerhaven Concert
19	Sticht. Poetry Int. Festival	Poetry International Festival
20	Sticht. Rotterdam Circusstad	Rotterdam Circus City
21	Stichting CHIO Rotterdam	CHIO
22	Stichting de Loodsen	Pleinbioscoop; Festival Witte de With
23	Stichting Nelson Mandela Festival	Nelson Mandela Festival
24	Stichting Nieuwe Muziek Rotterdam	RedSound
25	Stichting StanVaste jongeren en migranten omroep R'dam	Keti Koti
26	Stichting Rotterdam International Fringe Festival	North Sea Round Town
27	Stichting RopaRun	RopaRun
28	Stichting Rotterdam Baseball	Eneco World Port
29	Stichting Rotterdamse Museumnacht	Museumnacht Rotterdam
30	Stichting vrienden van het park (de artiesten ingang)	ZomerZondagen
31	Stichting Wereldhavenfestival Rotterdam	Wereldhavendagen
32	Tak Vormgeving	China Cultural Festival
33	Verborgten Tuinen Rotterdam	Verborgten Tuinen
34	Vijf890	Skateboard World Championship

Appendix 4 Weighted average of visitors' expenditure

Weighted Average			
Event	Average Expenditure	Number of visitors	Total expenditure (by visitors)
Summer Carnival	€ 61,00	700000	€ 42.700.000,00
Dunya Festival	€ 29,90	225000	€ 6.727.500,00
Dance Parade	€ 78,50	400000	€ 31.400.000,00
Metropolis	€ 31,20	36000	€ 1.123.200,00
Camping Rotterdam	€ 49,96	20000	€ 999.200,00
Day of romantic music	€ 10,20	25000	€ 255.000,00
Nelson Mandela	€ 18,96	20000	€ 379.200,00
World Port Days	€ 33,50	400000	€ 13.400.000,00
Musica Republica	€ 65,00	7500	€ 487.500,00
Your World City Games	€ 10,25	26825	€ 274.956,25
Totals	€ 388,47	1.860.325	€ 97.746.556,25
Average Expenditure	€ 52		
	Elsbeth Meijjer; Your World		
	Elsbeth Meijjer; Zomerfestivals		
	Blauw Research		

Appendix 5 General Information

Working in the event sector		N=31
Yes	84%	
No	16%	

Headquarter in Rotterdam		N=32
Yes	91%	
No	9%	

Organizing solely public events		N=32
Yes	75%	
No	25%	

Type of Organization		N=32
Foundation	84%	27
Private Comp.	9%	3
Sole Prop.	3%	1
Lmt. L. Comp.	3%	1

Number of public events				
Range	Fixed	Number	Fxd*Nbr	Perc.
1	1	16	16	53%
2	2	4	8	13%
3	3	1	3	3%
4	4	1	4	3%
5	5	3	15	10%
other	6	1	6	3%
other	10	1	10	3%
other	20	1	20	3%
		28	82	
Average	3			
Median	4,5			
High	20			
Low	1			

Appendix 6 Total revenue

Total revenue (x1000)				
Range	Fixed	Number	Fxd*Nbr	Percentage
0 - 40	20	3	60	9%
50 -100	75	6	450	19%
100-200	150	2	300	6%
200-300	250	3	750	9%
300-400	350	1	350	3%
400-500	450	1	450	3%
500-1000	750	6	4500	19%
1000-1500	1250	3	3750	9%
1500-2500	2500	2	5000	6%
2500-3500	3000	3	9000	9%
6000	6000	1	6000	3%
7500	7500	1	7500	3%
		32	37460	100%
Average	1208			
Median	250			
High	7500			
Low	20			
Stddev	2,006			

Appendix 7 Employees, Volunteers, Trainees

Full-time employees				
Range	Fixed	Number	Fxd*Nbr	Percentage
0 - 2	1	12	12	40%
3 - 5	4	7	28	23%
6 - 8	7	2	14	7%
9 - 11	10	2	20	7%
15 - 20	15	1	15	3%
30 - 40	35	4	140	13%
		28	229	
Average	8			
Median	8,5			
High	40			
Low	0	(only volunteers)		

Employees during event				
Range	Fixed	Number	Fxd*Nbr	Perc.
0		0	2	0
0 - 50		25	13	325
50 - 100		75	7	525
100-200		150	1	150
200-300		250	4	1000
300-500		400	2	800
600		600	1	600
1000		1000	1	1000
		31	4400	
Average	142			
Median	200			
High	1000			
Low	0	(alleen vrijwilligers)		

Hours per volunteer				
Range	Fixed	Number	Fxd*Nbr	Percentage
0-20	20	18	360	58%
20-50	35	9	315	29%
50-250	150	2	300	6%
250-500	375	0	0	0%
500-1000	750	1	750	3%
full time	1600	1	1600	3%
		31	3325	
Average	40			
Median	262,5			
High	1600			
Low	20			

Number of trainees				
Range	Fixed	Number	Fxd*Nbr	Percentage
0	0	9	0	30%
1	1	8	8	27%
2	2	3	6	10%
3	3	2	6	7%
4	4	1	4	3%
5	5	5	25	17%
other	8	1	8	3%
other	20	1	20	3%
		30	77	
Average	3			
Median	3,5			
High	20			
Low	0			

Appendix 8 Cost Structure

Organisation Costs				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	0	0	0%
10%	0,1	12	1,2	40%
20%	0,2	9	1,8	30%
30%	0,3	6	1,8	20%
40%	0,4	2	0,8	7%
50%	0,5	1	0,5	3%
		30	6,1	
Average	20%			
Median	20%			
High	50%			
Low	0%			

Program costs				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	0	0	0%
10%	0,1	1	0,1	3%
20%	0,2	9	1,8	30%
30%	0,3	12	3,6	40%
40%	0,4	4	1,6	13%
50%	0,5	1	0,5	3%
60%	0,6	2	1,2	7%
70%	0,7	1	0,7	3%
		30	9,5	
Average	32%			
Median	30%			
High	70%			
Low	0%			

Production costs				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	1	0	3%
10%	0,1	3	0,3	10%
20%	0,2	5	1	17%
30%	0,3	10	3	33%
40%	0,4	2	0,8	7%
50%	0,5	8	4	27%
60%	0,6	1	0,6	3%
		<u>30</u>	<u>9,7</u>	
Average	32%			
Median	30%			
High	60%			
Low	0%			

Marketing & communication costs				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	3	0	10%
10%	0,1	12	1,2	40%
20%	0,2	12	2,4	40%
30%	0,3	1	0,3	3%
40%	0,4	2	0,8	7%
		<u>30</u>	<u>4,7</u>	
Average	16%			
Median	15%			
High	40%			
Low	0%			

Appendix 9 Income Source

Subsidy				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	4	0	13%
10%	0,1	10	1	31%
20%	0,2	4	0,8	13%
30%	0,3	4	1,2	13%
40%	0,4	6	2,4	19%
50%	0,5	1	0,5	3%
60%	0,6	1	0,6	3%
70%	0,7	1	0,7	3%
80%	0,8	1	0,8	3%
		<u>32</u>	<u>8</u>	
Average	25%			
Median	20%			
High	80%			
Low	0%			

Funds				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	8	0	25%
10%	0,1	8	0,8	25%
20%	0,2	6	1,2	19%
30%	0,3	3	0,9	9%
40%	0,4	3	1,2	9%
50%	0,5	1	0,5	3%
60%	0,6	2	1,2	6%
70%	0,7	1	0,7	3%
		<u>32</u>	<u>6,5</u>	
Average	20%			
Median	15%			
High	70%			
Low	0%			

Sponsors				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	3	0	9%
10%	0,1	9	0,9	28%
20%	0,2	8	1,6	25%
30%	0,3	4	1,2	13%
40%	0,4	2	0,8	6%
50%	0,5	0	0	0%
60%	0,6	1	0,6	3%
70%	0,7	3	2,1	9%
80%	0,8	1	0,8	3%
90%	0,9	1	0,9	3%
		32	8,9	
Average	28%			
Median	20%			
High	90%			
Low	0%			

Own income				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	5	0	16%
10%	0,1	8	0,8	25%
20%	0,2	6	1,2	19%
30%	0,3	5	1,5	16%
40%	0,4	0	0	0%
50%	0,5	2	1	6%
60%	0,6	2	1,2	6%
70%	0,7	3	2,1	9%
80%	0,8	1	0,8	3%
		32	8,6	
Average	27%			
Median	20%			
High	80%			
Low	0%			

Appendix 10 Production costs

Technical equipment				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	1	0	4%
10%	0,1	3	0,3	11%
20%	0,2	5	1	18%
30%	0,3	8	2,4	29%
40%	0,4	4	1,6	14%
50%	0,5	6	3	21%
60%	0,6	0	0	0%
70%	0,7	1	0,7	4%
		28	9	
Average	33%			
Median	30%			
High	70%			
Low	0%			

Catering				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	4	0	14%
10%	0,1	11	1,1	39%
20%	0,2	7	1,4	25%
30%	0,3	6	1,8	21%
		28	4,3	
Average	16%			
Median	10%			
High	30%			
Low	0%			

Event facilities				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	1	0	4%
10%	0,1	2	0,2	7%
20%	0,2	4	0,8	14%
30%	0,3	10	3	36%
40%	0,4	4	1,6	14%
50%	0,5	3	1,5	11%
60%	0,6	3	1,8	11%
70%	0,7	1	0,7	4%
		28	9,6	
Average	35%			
Median	30%			
High	70%			
Low	0%			

Security				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	4	0	14%
10%	0,1	14	1,4	50%
20%	0,2	5	1	18%
30%	0,3	4	1,2	14%
40%	0,4	0	0	0%
50%	0,5	1	0,5	4%
		28	4,1	
Average	16%			
Median	10%			
High	50%			
Low	0%			

Appendix 11 Support from the city Rotterdam (funds & sponsors)

Support from Rotterdam Funds				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	6	0	21%
10%	0,1	8	0,8	29%
20%	0,2	2	0,4	7%
30%	0,3	3	0,9	11%
40%	0,4	3	1,2	11%
50%	0,5	0	0	0%
60%	0,6	1	0,6	4%
70%	0,7	2	1,4	7%
80%	0,8	1	0,8	4%
90%	0,9	0	0	0%
100%	1	2	2	7%
		28	8,1	
Average	29%			
Median	50%			
High	100%			
Low	0%			

Support from Rotterdam Sponsors				
Range	Fixed	Number	Fxd*Nbr	Perc.
0-20	0,1	11	1,1	35%
20-40	0,3	4	1,2	13%
40-60	0,5	4	2	13%
60-80	0,7	6	4,2	19%
80-100	0,9	6	5,4	19%
		31	13,9	
Average	45%			
Median	25%			
High	90%			
Low	10%			

Appendix 12 Geographical orientation suppliers

Technical equipment				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	4	0	13%
10%	0,1	1	0,1	3%
20%	0,2	4	0,8	13%
30%	0,3	1	0,3	3%
40%	0,4	0	0	0%
50%	0,5	2	1	6%
60%	0,6	0	0	0%
70%	0,7	0	0	0%
80%	0,8	1	0,8	3%
90%	0,9	5	4,5	16%
100%	1	13	13	42%
		31	20,5	
Average	66%			
Median	50%			
High	100%			
Low	0%			

Catering				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	6	0	21%
10%	0,1	3	0,3	10%
20%	0,2	1	0,2	3%
30%	0,3	1	0,3	3%
40%	0,4	0	0	0%
50%	0,5	2	1	7%
60%	0,6	1	0,6	3%
70%	0,7	0	0	0%
80%	0,8	1	0,8	3%
90%	0,9	2	1,8	7%
100%	1	12	12	41%
		29	17	
Average	59%			
Median	50%			
High	100%			
Low	0%			

Event Facilities				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	3	0	10%
10%	0,1	0	0	0%
20%	0,2	2	0,4	7%
30%	0,3	2	0,6	7%
40%	0,4	1	0,4	3%
50%	0,5	4	2	13%
60%	0,6	1	0,6	3%
70%	0,7	1	0,7	3%
80%	0,8	4	3,2	13%
90%	0,9	4	3,6	13%
100%	1	8	8	27%
		30	19,5	
Average	65%			
Median	50%			
High	100%			
Low	0%			

Security				
Range	Fixed	Number	Fxd*Nbr	Perc.
0%	0	12	0	41%
10%	0,1	1	0,1	3%
20%	0,2	0	0	0%
30%	0,3	1	0,3	3%
40%	0,4	0	0	0%
50%	0,5	2	1	7%
60%	0,6	0	0	0%
70%	0,7	1	0,7	3%
80%	0,8	0	0	0%
90%	0,9	1	0,9	3%
100%	1	11	11	38%
		29	14	
Average	48%			
Median	50%			
High	100%			
Low	0%			

Appendix 13 Geographical orientation employees.

External personnel from Rotterdam				
Range	Fixed	Number	Fxd*Nbr	Perc.
0-20%	0,1	7	0,7	22%
20-40%	0,3	2	0,6	6%
40-60%	0,5	7	3,5	22%
60-80%	0,7	7	4,9	22%
80-100%	0,9	9	8,1	28%
		32	17,8	
Average	56%			
Median	50%			
High	90%			
Low	10%			

Do business with the same suppli N=32	
Yes	97%
No	3%

Appendix 14 Database Rotterdam Festivals: Income sources

Operator	Totale income	Rotterdam Festivals	Other Municipality departments	Sponsoring	Funds	Own income
1	€ 157.000	€ 7.500	€ 45.500	€ 13.000	€ 73.000	€ 18.000
2	€ 800.350	€ 222.000	€ 15.000	€ 300.000	€ 50.000	€ 213.350
3	€ 1.131.480	€ 345.000	€ 350.000	€ 240.000	€ 130.000	€ 66.480
4	€ 1.317.000	€ 25.000	€ 544.000	€ 267.000	€ 215.000	€ 266.000
5	€ 106.000	€ 25.000	-	€ 57.000	€ 23.000	€ 1.000
6	€ 5.979.754	€ 20.000	€ 1.310.000	€ 363.465	€ 2.068.289	€ 2.218.000
7	€ 885.500	€ 105.000	-	€ 270.500	€ 294.000	€ 216.000
8	€ 398.500	€ 60.000	€ 121.500	€ 55.000	€ 85.000	€ 77.000
9	€ 237.500	-	-	€ 66.000	€ 155.000	€ 16.500
10	€ 142.600	€ 25.000	€ 55.000	€ 26.500	€ 21.000	€ 15.100
11	€ 29.000	-	€ 23.000	-	€ 6.000	-
12	€ 90.000	€ 22.500	€ 20.000	-	€ 47.500	-
13	€ 540.256	€ 45.000	€ 103.000	€ 75.000	€ 310.756	€ 6.500
14	€ 472.015	€ 35.000	€ 42.500	€ 42.500	-	€ 352.015
15	€ 45.230	€ 10.000	€ 6.500	€ 15.980	€ 7.750	€ 5.000
16	€ 90.500	€ 22.500	-	€ 32.500	€ 27.500	€ 8.000
17	€ 71.900	€ 5.000	-	€ 38.900	€ 17.000	€ 11.000
18	€ 60.000	€ 60.000	-	-	-	-
19	€ 708.476	€ 10.000	€ 342.800	€ 9.000	€ 166.197	€ 180.479
20	€ 213.400	€ 8.000	-	€ 100.000	€ 28.000	€ 77.400
21	€ 515.921	€ -	€ 256.500	€ 71.092	€ 174.636	€ 13.693
22	€ 295.000	€ 20.000	€ 80.000	€ 14.500	€ 100.000	€ 80.500
23	€ 143.350	€ 30.000	€ 20.000	€ 51.750	€ 35.600	€ 6.000
24	€ 374.355	€ 350.000	-	-	€ 24.355	-
25	€ 77.000	€ 12.500	-	€ 36.000	€ 27.500	€ 1.000
26	€ 395.250	€ 27.500	€ 65.000	€ 100.772	€ 158.370	€ 43.608
27	€ 261.000	€ 5.000	€ 44.500	€ 31.500	€ 166.500	€ 13.500
28	€ 711.550	€ 132.000	€ 83.000	€ 153.700	€ 97.000	€ 245.850
29	€ 165.885	-	-	€ 40.355	€ 21.000	€ 104.530
30	€ 60.000	€ 25.000	-	€ 12.500	€ 22.500	-
31	€ 1.187.500	€ 200.000	-	€ 585.000	-	€ 402.500
32	€ 46.500	€ 37.500	-	-	€ 6.000	€ 3.000
33	€ 32.000	€ 2.500	-	€ 10.500	-	€ 19.000
Totals	€ 17.741.772	€ 1.894.500	€ 3.527.800	€ 3.080.014	€ 4.558.453	€ 4.681.005
Average percentage of total income		11%	20%	17%	26%	26%

Appendix 15 Database Rotterdam Festival: Income Sources (in percentages)

Operator	Rotterdam Festivals	Other municipal departments	Sponsors	Funds	Own income
1	5%	29%	8%	46%	11%
2	28%	2%	37%	6%	27%
3	30%	31%	21%	11%	6%
4	2%	41%	20%	16%	20%
5	24%	-	54%	22%	1%
6	0%	22%	6%	35%	37%
7	12%	-	31%	33%	24%
8	15%	30%	14%	21%	19%
9	-	-	28%	65%	7%
10	18%	39%	19%	15%	11%
11	-	79%	-	21%	-
12	25%	22%	-	53%	-
13	8%	19%	14%	58%	1%
14	7%	9%	9%	-	75%
15	22%	14%	35%	17%	11%
16	25%	-	36%	30%	9%
17	7%	-	54%	24%	15%
18	100%	-	-	-	-
19	1%	48%	1%	23%	25%
20	4%	-	47%	13%	36%
21	0%	50%	14%	34%	3%
22	7%	27%	5%	34%	27%
23	21%	14%	36%	25%	4%
24	93%	-	-	7%	-
25	16%	-	47%	36%	1%
26	7%	16%	25%	40%	11%
27	2%	17%	12%	64%	5%
28	19%	12%	22%	14%	35%
29	-	-	24%	13%	63%
30	42%	-	21%	38%	-
31	17%	-	49%	-	34%
32	81%	-	-	13%	6%
33	8%	-	33%	-	59%

Appendix 16 Database Rotterdam Festivals: Cost Structure

Operator	Total costs	Organisation costs	Program costs	Production costs	M & C kstn
1	€ 159.075	€ 20.575	€ 47.000	€ 47.000	€ 44.500
2	€ 931.000	€ 208.000	€ 112.000	€ 549.000	€ 62.000
3	€ 881.480	€ 196.400	€ 214.250	€ 422.080	€ 48.750
4	€ 1.292.000	€ 312.000	€ 502.000	€ 322.000	€ 156.000
5	€ 86.000	€ 9.500	€ 50.000	€ 23.000	€ 3.500
6	€ 7.597.404	€ 3.098.013	€ 2.357.164	€ 1.583.760	€ 558.467
7	€ 786.130	€ 270.009	€ 116.500	€ 331.021	€ 68.600
8	€ 398.500	€ 114.170	€ 89.350	€ 158.380	€ 36.600
9	€ 238.118	€ 80.250	€ 29.350	€ 54.593	€ 73.925
10	€ 167.719	€ 61.040	€ 40.360	€ 49.975	€ 16.344
11	€ 29.000	€ 12.000	€ 13.150	€ 3.850	-
12	€ 100.000	€ 36.100	€ 21.500	€ 36.400	€ 6.000
13	€ 694.610	€ 68.000	€ 443.300	€ 133.310	€ 50.000
14	€ 474.516	€ 147.104	€ 71.000	€ 214.370	€ 42.042
15	€ 50.000	€ 1.000	€ 27.000	€ 20.000	€ 2.000
16	€ 98.000	€ 15.000	€ 25.000	€ 55.000	€ 3.000
17	€ 71.900	€ 11.100	€ 17.500	€ 36.300	€ 7.000
18	€ 60.000	€ 31.355	€ 20.870	€ 5.000	€ 2.775
19	€ 667.125	€ 185.712	€ 246.766	€ 184.973	€ 49.674
20	€ 213.180	€ 26.000	€ 73.000	€ 99.630	€ 14.550
21	€ 1.097.570	€ 258.833	€ 379.833	€ 287.413	€ 171.491
22	€ 277.513	€ 80.190	€ 129.390	€ 33.350	€ 34.583
23	€ 143.350	€ 36.750	€ 9.000	€ 84.500	€ 13.100
24	€ 373.701	€ 126.050	€ 179.316	€ 41.704	€ 26.631
25	€ 129.735	€ 38.450	€ 32.400	€ 36.885	€ 22.000
26	€ 343.675	€ 50.000	€ 253.675	-	€ 40.000
27	€ 126.015	€ 16.000	€ 92.675	-	€ 17.340
28	€ 610.550	€ 78.000	€ 377.050	-	€ 155.500
29	€ 165.385	€ 22.670	€ 48.950	€ 44.165	€ 49.600
30	€ 70.000	€ 15.800	€ 37.680	€ 11.950	€ 4.570
31	€ 1.241.250	€ 222.700	€ 484.700	€ 403.750	€ 130.100
32	€ 49.059	€ 17.850	€ 11.500	€ 15.709	€ 4.000
33	€ 30.500	€ 16.000	-	-	€ 14.500
Total	€ 19.654.060	€ 5.882.621	€ 6.553.229	€ 5.289.068	€ 1.929.142
Average percentage of total costs		30%	33%	27%	10%

Appendix 17 Database Rotterdam Festival: Cost Structure (in percentage)

Operator	Organisation costs	Program costs	Production costs	M & C costs
1	13%	30%	30%	28%
2	22%	12%	59%	7%
3	22%	24%	48%	6%
4	24%	39%	25%	12%
5	11%	58%	27%	4%
6	41%	31%	21%	7%
7	34%	15%	42%	9%
8	29%	22%	40%	9%
9	34%	12%	23%	31%
10	36%	24%	30%	10%
11	41%	45%	13%	-
12	36%	22%	36%	6%
13	10%	64%	19%	7%
14	31%	15%	45%	9%
15	2%	54%	40%	4%
16	15%	26%	56%	3%
17	15%	24%	50%	10%
18	52%	35%	8%	5%
19	28%	37%	28%	7%
20	12%	34%	47%	7%
21	24%	35%	26%	16%
22	29%	47%	12%	12%
23	26%	6%	59%	9%
24	34%	48%	11%	7%
25	30%	25%	28%	17%
26	15%	74%	-	12%
27	13%	74%	-	14%
28	13%	62%	-	25%
29	14%	30%	27%	30%
30	23%	54%	17%	7%
31	18%	39%	33%	10%
32	36%	23%	32%	8%
33	52%	-	-	48%

Appendix 18 Pearson Correlations

Correlations

		Organization_type	Aantal_werknemers	Aantal_vrijwilligers	Omzet	Org_kstn	Prog_kstn	Prod_kstn	M_C_kstn	Subsidy	Funds	Sponsors	Own_inc
Organization_type	Pearson Correlation	1	-.116	-.073	.092	.155	.023	.197	-.208	.033	-.215	.092	.053
	Sig. (2-tailed)		.527	.693	.629	.397	.900	.280	.253	.857	.238	.617	.771
	N	32	32	32	30	32	32	32	32	32	32	32	32
Aantal_werknemers	Pearson Correlation	-.116	1	.149	.284	.033	-.034	.069	-.025	.149	-.147	-.131	.128
	Sig. (2-tailed)	.527		.416	.129	.859	.855	.709	.891	.417	.421	.475	.484
	N	32	32	32	30	32	32	32	32	32	32	32	32
Aantal_vrijwilligers	Pearson Correlation	-.073	.149	1	.474**	-.100	-.321	.082	-.063	-.070	-.319	.184	.133
	Sig. (2-tailed)	.693	.416		.008	.587	.073	.656	.732	.703	.075	.313	.468
	N	32	32	32	30	32	32	32	32	32	32	32	32
Omzet	Pearson Correlation	.092	.284	.474**	1	.098	.076	-.042	-.082	.151	-.482**	.089	.165
	Sig. (2-tailed)	.629	.129	.008		.607	.688	.825	.668	.427	.007	.641	.384
	N	30	30	30	30	30	30	30	30	30	30	30	30
Org_kstn	Pearson Correlation	.155	.033	-.100	.098	1	.246	.053	.154	.452**	.052	-.484**	.067
	Sig. (2-tailed)	.397	.859	.587	.607		.175	.774	.399	.009	.776	.005	.717
	N	32	32	32	30	32	32	32	32	32	32	32	32
Prog_kstn	Pearson Correlation	.023	-.034	-.321	.076	.246	1	-.044	.174	.173	.343	-.294	-.128
	Sig. (2-tailed)	.900	.855	.073	.688	.175		.812	.341	.344	.055	.103	.485
	N	32	32	32	30	32	32	32	32	32	32	32	32
Prod_kstn	Pearson Correlation	.197	.069	.082	-.042	.053	-.044	1	.164	-.065	-.036	-.139	.228
	Sig. (2-tailed)	.280	.709	.656	.825	.774	.812		.369	.724	.845	.448	.209
	N	32	32	32	30	32	32	32	32	32	32	32	32
M_C_kstn	Pearson Correlation	-.208	-.025	-.063	-.082	.154	.174	.164	1	-.090	.110	-.152	.143
	Sig. (2-tailed)	.253	.891	.732	.668	.399	.341	.369		.625	.551	.407	.435
	N	32	32	32	30	32	32	32	32	32	32	32	32
Subsidy	Pearson Correlation	.033	.149	-.070	.151	.452**	.173	-.065	-.090	1	.083	-.414*	-.501**
	Sig. (2-tailed)	.857	.417	.703	.427	.009	.344	.724	.625		.651	.018	.003
	N	32	32	32	30	32	32	32	32	32	32	32	32
Funds	Pearson Correlation	-.215	-.147	-.319	-.482**	.052	.343	-.036	.110	.083	1	-.507**	-.372*
	Sig. (2-tailed)	.238	.421	.075	.007	.776	.055	.845	.551	.651		.003	.036
	N	32	32	32	30	32	32	32	32	32	32	32	32
Sponsors	Pearson Correlation	.092	-.131	.184	.089	-.484**	-.294	-.139	-.152	-.414*	-.507**	1	-.256
	Sig. (2-tailed)	.617	.475	.313	.641	.005	.103	.448	.407	.018	.003		.157
	N	32	32	32	30	32	32	32	32	32	32	32	32
Own_inc	Pearson Correlation	.053	.128	.133	.165	.067	-.128	.228	.143	-.501**	-.372*	-.256	1
	Sig. (2-tailed)	.771	.484	.468	.384	.717	.485	.209	.435	.003	.036	.157	
	N	32	32	32	30	32	32	32	32	32	32	32	32

** Correlation is significant at the 0.01 level (2-tailed).

* Correlation is significant at the 0.05 level (2-tailed).

Appendix 19 Questions in qualitative survey

Doel van het interview

- Inzicht krijgen in de partijen die in deze industrie werkzaam zijn. (deel 1)
- De kern en gerelateerde activiteiten onderscheiden. (deel 2)
- Inzicht in omzet en personeel
- Overall indruk krijgen van de industrie, export, toekomst, kostenposten en verdeling... (deel 3)

Deel 1

1. Welke partijen vormen volgens u de evenementen branche in het algemeen? (Met wie doet u zaken?)
 - Organisatoren
 - Leveranciers
 - Horeca
 - Licht en Geluid
 - Beveiliging
 - Publiciteit & Communicatie
 - Geldverstrekkers
 - Distributie (tickets, flyers, etc.)
 - Inhoud (artiesten, kunstenaars)
 - (gemeente)
2. Met welke van bovengenoemde partijen werkt u in Rotterdam? Komen ze ook (vooral) uit Rotterdam? En werkt u altijd/vaak met dezelfde partijen? (vraag 2, 3 & 4)
 - Geldverstrekkers
 - i. Fondsen
 - ii. Subsidies
 - iii. Sponsors (variërend)
 - Horeca/ Catering
 - Licht en Geluid
 - Advies
 - Distributie
 - Inhoud (programma etc.)
 - Beveiliging
3. Werkt u met de zelfde partijen samen?
 - Zo ja, met welke en waarom
4. Komen deze partijen vooral uit Rotterdam ? Aangeven in % (per partij)
 - Zo ja, welke?
5. Zijn er nog andere belangrijke partijen waarmee u samenwerkt?

Deel 2

6. Wat zijn uw hoofdactiviteiten als organisator/organisatie?
 - Planning
 - Productie (incl. beveiliging)
 - M & C
 - Financiering
 - Programmering

Deel 3

7. Welke posten herbergen de meeste kosten
 - Kunt u een indeling maken over deze kosten %
 - i. Personeelskosten
 - ii. Productiekosten
 - iii. Programma kosten
 - iv. Marketing & Communicatie
 - v. (Beveiliging)
8. Hoeveel mensen heeft u vast in dienst
9. Hoeveel mensen huurt u per jaar in. (uren, dagdelen) gemiddeld.
10. Hoeveel vrijwilligers zijn er werkzaam tijdens uw evenementen
11. Hoeveel stagiaires?
12. Is er sprake van export in de sector?

Publieksevenement

- Begin en eind
- Plaatsgebonden
- Vrij toegankelijk (al dan niet betaald)
- Bewust organiseert
- Met een bepaalde doelstelling (thema)

Appendix 20 Questionnaire of the quantitative survey

Publieksevenementen Sector Rotterdam

Beste deelnemer,

In de begeleidende brief en gesprek bent u op de hoogte gebracht van het doel van deze vragenlijst. In deze introductie wil ik benadrukken dat de informatie die voort komt uit deze enquête discreet behandeld zal worden. Dat het bij dit onderzoek gaat om een totaal beeld van de sector en geen individuele gegevens zullen worden gepubliceerd. Daarbij spreek ik de hoop uit dat dit onderzoek bijdraagt aan de discussie rondom de aankomende bezuinigingen.

Met vriendelijke groet,

Salko Hofman

Start

Publieksevenementen Sector Rotterdam

Dit onderzoek richt zich op de publieksevenementen sector van Rotterdam. In dit onderzoek wordt een publieksevenement als volgt gedefinieerd: "Een plaats- en tijdsgebonden fenomeen, met een duidelijk begin- en eindpunt. In principe toegankelijk voor iedereen (betaald en onbetaald) dat met een specifieke vorm en gericht op een bepaalde doelgroep een doelstelling probeert te bereiken (m.u.v. concerten en congressen).

Om het onderzoeksgebied af te bakenen is gekozen voor de organisaties die evenementen met meer dan 5000 bezoekers organiseren.

1.

Wat is de naam van uw organisatie? *

2.

Bent u werkzaam in de evenementen sector *

ja

nee

3.

Is uw hoofdkantoor gevestigd in Rotterdam? *

ja

nee

4.

Welke vorm heeft uw organisatie?

- Stichting
- B.V.
- Eenmanszaak
- N.V.

5.

Hoeveel publieksevenementen organiseert u per jaar? *

- 1
- 2
- 3
- 4
- 5
- anders namelijk

6.

Organiseert u alleen publieksevenementen in Rotterdam? *

- Ja
- Nee
- Zo niet, waar nog meer?

7.

Hoeveel werknemers zijn er gedurende een geheel jaar bij uw organisatie in dienst?

- 0 - 2
- 3 - 5
- 6 - 8
- 9 - 11
- anders namelijk

Bij de volgende vraag gaat het om de werknemers van alle betrokken partijen tijdens een evenement zoals, horeca, beveiliging, programmering, marketing&communicatie etc.

(Organiseert u meerdere evenementen, kunt u de vragen beantwoorden met geaggregeerde cijfers, door de aantallen of cijfers bij elkaar op te tellen)

8.

Hoeveel betaalde medewerkers zijn er tijdens het hoogte punt van uw evenement aan het werk? *

- 0 - 50
- 51 - 100
- 101 - 200
- 201 - 300
- 301 - 500
- anders namelijk

9.

Hoeveel vrijwilligers zijn er werkzaam gedurende uw festival(s) *

- 0 - 20
- 21 - 40
- 41 - 60
- 61 - 100
- 101 - 250
- 251 - 500
- 501 - 1000
- 1000 of meer

10.

Hoeveel uur werken de vrijwilligers gemiddeld?

- 0 - 20
- 21 - 50
- 51 - 250
- 251 - 500

- 500 - 1000
- Full time

11.

Hoeveel stagiaires heeft u jaarlijks meelopen in uw organisatie? *

- 0
- 1
- 2
- 3
- 4
- 5
- anders namelijk

De volgende vraag gaat over de omzet die u genereert tijdens uw evenement(en). Het gaat hier om gegevens uit 2009. Mochten desbetreffende cijfers niet beschikbaar zijn, kunt u ook cijfers uit 2010 of 2011 gebruiken, gelieve dit aan te geven. (bij ander jaartal vak voor 'jaartal' ook aanvinken)
(Organiseert u meerdere evenementen, kunt u de vragen beantwoorden met aggregierte cijfers, door de cijfers van verscheidene evenementen bij elkaar op te tellen)

12.

Wat was de omzet van uw evenement(en) in het jaar 2009.

- 0 - 40.000
- 50.000 - 100.000
- 100.000 - 200.000
- 200.000 - 300.000
- 300.000 - 400.000
- 400.000 - 500.000
- 500.000 - 1.000.000
- 1.000.000- 1.500.000
- Hoger namelijk,
- Jaartal

Bij de volgende vraag wordt in acht genomen dat de gevraagde verdeling afhankelijk is van het inhoud en het doel van het festival. Wij willen we u toch vragen een inschatting te maken over de verdeling van kosten op uw evenement(en).

13.

Welk percentage van uw budget gaat gemiddeld naar personeelskosten, programmeringskosten, productiekosten en marketing- en communicatiekosten. (Het totale percentage mag niet boven de 100% uitkomen)

	0	10	20	30	40	50	60	70	80	90	100
Personeel- / Organisatiekosten	<input type="radio"/>										
Programmeringskosten	<input type="radio"/>										
Productiekosten	<input type="radio"/>										
Marketing- en Communicatiekosten	<input type="radio"/>										

14.

Productiekosten kunnen algemeen ingedeeld worden over: techniek (licht&geluid), horeca, faciliteiten(podia, tribunes, hekken, stands etc.) en beveiliging. Kunt u een verdeling geven van de gemaakte kosten per onderdeel, in procenten.(het totaal mag niet meer zijn als 100%)

	0	10	20	30	40	50	60	70	80	90	100
Techniek	<input type="radio"/>										
Horeca	<input type="radio"/>										
Faciliteiten	<input type="radio"/>										
Beveiliging	<input type="radio"/>										

15.

Bij personeel- en productiezaken worden vaak externe partijen ingeschakeld. Welke percentage van deze partijen komt uit Rotterdam?

- 0 - 20
- 20 - 40
- 40 - 60
- 60 - 80
- 80 - 100

De volgende vraag betreft de dekking van uw evenement.

16.

Welk percentage van uw financiering komt van subsidiënten, fondsen, sponsors en eigen inkomsten. (Het totale percentage mag niet boven de 100% uitkomen)

	0	10	20	30	40	50	60	70	80	90	100
Subsidiënten (Publiek; RotterdamFestivals, dKC, OBR , OCW etc.)	<input type="radio"/>										
Fondsen (Privaat; Volkskracht, SNS, VSB, PrinsBernard, etc.)	<input type="radio"/>										
Sponsors	<input type="radio"/>										
Eigen Inkomsten (recette, pacht, horeca, etc.)	<input type="radio"/>										

17.

In geval van financiering d.m.v. fondsen, welk percentage komt van Rotterdamse fondsen?

- 0
- 10
- 20
- 30
- 40
- anders namelijk

18.

Bij de financiering d.m.v. sponsoring, kunt u aangeven voor welk deel het gaat om Rotterdamse sponsors? (in procenten)

- 0 - 20
- 20 - 40
- 40 - 60
- 60 - 80
- 80 - 100

Het laatste gedeelte van deze vragenlijst betreft de toelevering aan uw evenement. Eerder is er een algemene indeling gemaakt van de leveranciers, bestaande uit: Techniek (licht&geluid), horeca, faciliteiten (podia, tribunes, stands, hekken) en beveiliging.

19.

Welk percentage van de partijen waarmee u samenwerkt komt uit Rotterdam?

	0	10	20	30	40	50	60	70	80	90	100
Techniek	<input type="radio"/>										
Horeca	<input type="radio"/>										
Faciliteiten	<input type="radio"/>										
Beveiliging	<input type="radio"/>										

20.

Doet u over het algemeen zaken met dezelfde leveranciers. *

- ja
- nee

Verzend deze vragenlijst

Dit was de laatste vraag van deze enquête. Bedankt voor uw medewerking. Zodra de uitkomsten van het onderzoek bekend zijn wordt u op de hoogte gebracht. Des gewenst zal een versie worden toegestuurd.

Appendix 21 Origin of visitors

Event	Reg (%)	Nat (%)	Int (%)	Reg (visitors)	Nat (visitors)	Int (visitors)
1	100%	-	-	31046		
2	35%	64%	1%	37135	67904	1061
3	60%	25%	15%	3420	1425	855
4	56%	33%	11%	392000	231000	77000
5	80%	20%	-	180000	45000	
6	50%	48%	2%	8750	8400	350
7	88%	10%	2%	17600	2000	400
8	78%	18%	4%	265980	61380	13640
9	50%	40%	10%	200000	160000	40000
10	70%	25%	5%	25200	9000	1800
11	75%	23%	2%	15000	4600	400
12	90%	10%	-	13500	1500	
13	88%	11%	1%	4400	550	50
14	100%	-	-	40000		
15	99%	1%	-	19800	200	
16	100%	-	-	30000		
17	60%	35%	5%	540000	315000	45000
18	65%	35%	-	357500	192500	
19	50%	49%	1%	3500	3430	70
20	100%	-	-	7500		
21	100%	-	-	7000		
22	85%	14%	1%	21250	3500	250
23	75%	20%	5%	13500	3600	900
24				0	-	-
25	100%	-	-	8000		
26	70%	25%	5%	7350	2625	525
27	50%	49%	1%	2500	2450	50
28	50%	40%	10%	2500	2000	500
29	90%	10%	-	9900	1100	
30		-	-	55000		
31	85%	13%	2%	21250	3250	500
32	80%	15%	5%	28000	5250	1750
33	95%	4%	1%	19000	800	200
34	65%	30%	5%	6939	3203	534
35	67%	30%	3%	4020	1800	180
36	80%	15%	5%	44800	8400	2800
37	88%	20%	-	26400	6000	
38						
39	100%	-	-	52000		
40	85%	15%	-	10625	1875	
41	95%	5%	-	11400	600	
42	55%	33%	12%	220000	132000	48000
43	100%	-	-	10000		
44	90%	9%	1%	24300	2430	270
45						
46	40%	40%	20%	10000	10000	5000
47	95%	4%	1%	25484	1073	268
Totals				2833549	1295845	242353
Percentage from total visitors (average)				Regional	National	International
				65%	30%	5%