

INTERNATIONAL SHOWCASING STRATEGY FOR THE ARTS OF WALES RESEARCH REPORT 2018

Commissioned by British Council Wales and produced by Visiting Arts



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EXECUTIVE SUMMARY

BACKGROUND

This report was commissioned by British Council Wales to research and identify different models of showcasing that would best support the development and exposure of Welsh artists and arts organisations to international industry.

The report recognises that international showcasing is now a crowded and competitive area. To become more visible and to compete among nations, Wales needs to take a clear, bold and strategic approach.

The Welsh arts and cultural sector needs: more skilled artists and curators who can effectively market themselves and their work; more export-ready work; greater collaboration, integration and shared strategies between agencies; more flexible and longer-term funding models; more international promoters coming to Wales, drawn by cross-sector showcasing platforms; a more sustained and visible presence at international events; and a bold, appealing offer that shares Wales' unique strengths and distinctive voice with the rest of the world.

The benefits of showcasing are not short-term financial return on investment (ROI) but artistic, social and professional stimulus, with many outcomes being cumulative and long-term. Culture plays a vital role in cultural diplomacy and highlighting shared cultures, histories and points of contact. It is essential that this is more widely understood.

The aim of this research was to consult widely with the arts and cultural sector in order to provide evidence-based recommendations that can act as a starting point for future conversations with the sector, key stakeholders, potential funders, international programmers, producers, curators and managers.

The research was undertaken by Yvette Vaughan Jones, Chief Executive of Visiting Arts. Visiting Arts has 40 years' experience of working in the international arts and cultural field. The research took place between May and July 2018.

SUMMARY OF THE RESEARCH ANALYSIS

The key points that emerged from our research are outlined below.

1. More investment in showcasing expertise and skills

Wales needs to develop and nurture its curators and creative producers and network them into the global ecosystem so that they can see work, sell Wales and engage in international discussion. Artists need coaching to strengthen their skills, including soft selling skills and marketing, so that they can maximise the benefits of their time at international showcasing events. Wales also needs to attract and to nurture more good programmers.

The high-quality artistic work produced in Wales needs to also be export-ready. Artists should nurture new, innovative and niche work for international markets. To support this, funding cycles need to allow for the re-staging and showcasing of the best work.

There is a need to upskill the current Welsh International cultural sector including those who are in regular attendance at international events, Welsh Government overseas offices, UK Government Trade and Invest, FCO and British Council overseas networks, so they can be advocates for Welsh culture.

2. A longer-term, multi-agency, joined-up approach

Wales' showcasing is currently being hindered by a lack of continuity and strategic framework in the approaches of international agencies. There is a proliferation of international agencies in Wales which causes confusion and duplication.

The sector within Wales would benefit from cross-agency sharing of strategies and investment into a sustained Welsh presence at international showcasing events. There is also a need for finance to be administered in a way that is longer-term, more flexible and more integrated between agencies.

3. Development of domestic showcasing platforms

“We are too small to work in silos”

Showcasing platforms need to be developed within Wales. The majority of people we interviewed suggested that building on current successes would be the best way of showcasing Welsh work. Current Wales-based initiatives of international scale and scope could be supported to create a greater platform for Wales’ artists and cultural organisations and to increase their dialogue with international experts.

The research identified Wales’ premier cultural assets, such as the Hay Festival, Artes Mundi and Green Man Festival, but if one of these were to be developed as a showcasing platform, it would need to be in collaboration with the wider cultural sector, so that the benefits are more widely felt, and to ensure maximum exposure of Welsh work.

The critical success factors of such events were identified as: work of great impact and international interest; connection with Wales and distinctive and diverse cultural identities; and engagement of local people and organisations. Attendance of industry professionals at these events is vital, and needs to be approached strategically, with well-researched ambitions and clear, measurable outcomes.

4. Need for sustained showcasing of Wales at internationally facing platforms

The Welsh arts and cultural sector wants to see cross-agency strategic and long-term investment into a sustained Welsh presence at major international showcasing platforms in order to build networks, expertise and counteract the perceived invisibility of Wales.

Currently, artists from Wales are not visible enough at the key international events. Welsh presence at showcasing is inconsistent, not strategic and not sustained, compared to other small nations or regions. Attenders are often from the public sector rather than industry specialists.

In terms of drawing down funding from Arts Council Wales and British Council, it is more difficult to secure support for UK showcases compared to those overseas, and yet UK showcases (such as Great Escape, Celtic Connections and Norwich Writers Showcase) are of major importance. There is an evidenced need to respond to the value in showcasing in the UK and create funding pathways that allow for this.

There should be more development of the Wales international residency programmes and greater profile for the opportunities on offer.

More industry-led events, such as Manifesta (visual arts), Cineregio (film) or the American Association of Museums conference (heritage), should be invited to Wales to showcase sector-specific work, the wider cultural offer, and the landscape and people of Wales.

5. Need for a distinctive international Welsh voice

“There is an incredible offer in Wales but it is too quiet – it needs to be clearer and bolder.”

Showcasing Wales’ arts and cultural work needs an innovative, inspirational approach that reflects the people, aesthetic and culture of the place, as well as its special strengths.

Many people that we spoke to identified Wales’ strengths in specialist areas such as arts in health, arts and the elderly, site-sensitive work and community engagement.

The research showed that key promoters and curators value niche festivals where they can see innovative work above the major showcases. The research also showed that any new showcase needs to offer something unique to international promoters to be successful.

Our research identified a need for funding bodies to put a higher prioritisation on resources for marketing of work to increase its visibility and export-readiness.

WHAT IS SHOWCASING? WHY DO WE NEED IT AND WHAT ARE THE MODELS?

Showcasing means bringing work to the attention of those people who are in the business of promoting, participating in or purchasing it. It has many faces and can have lasting legacies. In gathering ideas on what showcasing might mean for Wales, the following options were put forward for consideration:

- Large cross-sectoral public-facing and/or festival events in Wales.
- Sector-specific festivals/trade fairs in Wales or overseas.
- International delegations brought to Wales to see work.
- Attendance at overseas festivals, trade fairs and showcases.
- Attendance at other trade missions or political events, not focused on arts and culture.
- Creating opportunities to showcase Wales in major cities such as London, Manchester, Berlin, and New York.
- One-off 'showstopper' works that can act as a catalyst to attract international promoters.

The debate around the best method of international showcasing is always a vexed question in small nations. There are fewer resources for the arts in Wales than in England and Scotland, and yet the costs of major events as well as infrastructure remain largely the same.

At the same time, international professional producers, curators and festival directors are less willing to come to small nations and require extra strategies. Funding for anything other than revenue is proportionally much less available and so the value for money arguments are even more critical.

The benefits of international showcasing are many. They include:

- artistic revivification and professional kudos;
- positioning of the country and making it a more attractive place to visit, relocate to or do business in;
- creation of new markets, opportunities and ways of working;
- wider exploration of the intellectual property from the work; and
- creating new income streams. As an example, a recent evaluation of economic impact of the filming of *Hinterland* in Aberystwyth created a 1:6 multiplier from increased visitors to the town.

While the driver for showcasing may be principally to develop new markets for artists and cultural organisations, showcasing can also provide a platform for diaspora communities. Both the Minister for Culture, Tourism and Sport and the CEO and Chair of the Arts Council of Wales mentioned this in interviews. Cultural diplomacy, tourism and economic advantage were also cited as important outcomes of successful showcasing.



FOCUS Wales 2018. Image credit: Ben Jones

WHY THIS RESEARCH?

WHY NOW?

This report has been commissioned to identify different models that might support the development and exposure of Welsh artists and arts organisations to international industry within what is now a crowded and competitive national and international landscape. This could be an annual or biennial international showcasing event in Wales. Alternatively, it could be the development of a roster of Welsh artists and performers that are ready to perform at other showcases such as Tokyo Performing Arts Market, International Society for the Performing Arts, Shanghai Performing Arts Festival, Dublin Theatre festival, South by Southwest and so on.

Unlike many small countries and regions/cities, Wales does not yet benefit from hosting its own major annual or biennial international culture platform, although there are many excellent festivals and showcasing platforms that attract international attendance that could be developed with wider sector buy-in.

The aims of this research are:

- to consolidate existing showcasing research and apply it to a Wales context
- to map the current landscape inside Wales and best practice elsewhere
- to provide recommendations based on sector consultation both inside and outside of Wales as to what the best approach to sector-led and industry-focused showcasing in Wales might be.

The research we have carried out is inclusive of the whole sector and looks beyond art form. It identifies the best opportunities for Wales and provides evidence-based recommendations as a starting point for further conversations.

CONTEXT

This research took place from April - July 2018. At this time, the UK government was midway in its negotiations for the conditions of leaving the EU. In Wales, at governmental level, this has triggered an increased interest in its overall international strategy, and moves have been made to strengthen the strategy and to include arts and culture within it. The cultural sector is in the midst of discussions on how best to mitigate the future lack of access to EU funding for the arts and, perhaps equally importantly, the diminishing access to best practice, networks and engagement in EU programmes.

Local authorities across Wales and the UK are also changing their relationships with the arts; they are acting more as facilitators than funders as their funding becomes stretched and they find themselves in the difficult position of having diminishing resources and increased demands on their statutory services.

The trend in EU funding through the latest programme, Creative Europe, has moved from support for 'supply' – the creation of works – to 'demand' – stimulating the audiences and users. At the same time, UK funding for the arts through the arts councils has moved towards specific evidence-based funding and in particular a strong move to engage more diverse audiences. This has been partly driven by the increasing use of lottery funding which has as its ethos the desire to reach out more to communities that are traditionally less engaged in arts work. It is also in response to a number of reports that have shown a disconnect between what people want and where funding is directed. This means that funding for international work could be considered less important, unless it is linked to diaspora group development. Many international initiatives are long-term and show a slow rate of return on investment. They are therefore vulnerable to being cut.

WALES CONTEXT

In Wales, culture is a devolved area and Welsh Government, working with Arts Council of Wales, has been able to craft a different set of priorities from England and Scotland, most notably the Creative Learning in Schools initiatives, arts in health, the Well-being of Future Generations (Wales) Act and bilingualism which could provide a more distinctive narrative for Wales internationally. However, the arts and cultural sector in Wales face major challenges:

- Reduced dependence on public funding. On average, Wales' arts organisations have a higher public funding subsidy than those in England.
- The need to develop a greater relationship with local audience needs and perceptions and to ensure that work is relevant.
- Greater need to generate income.
- Greater competition for raising profile from major initiatives such as UK City of Culture, the Great Northern Exhibition etc.

Despite funding difficulties, Wales continues to grow its major festivals and companies whose reputations have held up well in recent years. It has also had major events successes recently, which have both engaged large and varied local audiences and attracted attention from outside of Wales: notably Roald Dahl's City of the Unexpected, the Dylan Thomas Anniversary Festival, and National Theatre of Wales' Passion. The appetite for well-curated, well-run, large-scale events remains high from the organisations involved, the public and public bodies. This was particularly evident through the focus group for this research held in Swansea, where the sector is still energised after the experience of bidding for the UK City of Culture. How best to capitalise on these events is discussed in this report.

WHAT CULTURAL SHOWCASING ASSETS DOES WALES ALREADY HAVE?

It is clear from interviews that when people know about Wales, then it is its cultural assets that are most widely known.

Mentioned most frequently in response to this research were:

- Hay Festival
- Artes Mundi
- Wales in Venice
- Green Man Festival
- The collections at the National Museum of Wales
- Festival No. 6
- Festival of Voice
- BBC Cardiff Singer of the World
- IRIS film festival.

However, these festivals also present several challenges in terms of showcasing; there is not a cohesive multi-agency effort to support international peers, presenters and promoter's attendance within these events. The most common response amongst interviewees from outside Wales was that:

'There is an incredible offer in Wales, but it is too quiet – it needs to be clearer and bolder'.

The South Wales Chamber of Commerce agreed that the above statement is what they find outside of Wales. They added that for promoting Wales overseas, businesses have export success by associating with the UK as a strong brand of good quality.

Common characteristics of the successful initiatives above are:

- Strong leadership with clear vision, ambition and drive of the organisations.
- International work at their heart, rather than the desire to showcase Welsh work; the showcasing of Welsh happens more subtly.
- Winning respect within their industries by engaging industry leaders from outside Wales.

The majority of people interviewed suggested building on these successes as the best way of showcasing Welsh work rather than creating a new vehicle. There was a universal suspicion surrounding political or public sector initiatives to showcase Wales through its arts sector, and a far greater emphasis on developing trusted and respected vehicles through which Wales' arts and artists could be shown in a more varied context alongside work from other countries. We explore some models later in the report.

RESEARCH METHODOLOGY, FINDINGS AND CONCLUSIONS

We wanted the sector itself to lead our approach to identifying options and recommendations for how it could carry out showcasing more effectively. Over the period of May to July 2018, we conducted one-to-one interviews and an online survey that allowed people to talk more widely about Wales and their perceptions of where it sits in the international arts and cultural arena. We also conducted:

- desk research on the significant existing reports on the topic
- an online bilingual survey across Wales with 70 respondents
- Four focus groups in Llandudno, Aberystwyth, Cardiff and Swansea with 44 attenders
- 47 interviews with local and international experts.

The approach is designed with a view that recommendations should be principally (though not exclusively) industry-focused rather than public-facing, and options need to provide a significant return on public investment.

A stakeholder group made up of 14 Welsh cultural players has been involved in making recommendations and suggestions throughout the process.

In this document we use 'the sector' to refer to Arts Council of Wales-funded sectors and also the museum and heritage sectors, film and television. Despite the move towards multi-platform approaches, we have not included other forms of screen-based media, nor have we included creative sectors such as design, architecture or fashion. The rationale is that the latter sectors tend to work outside of the public sector where the majority of these recommendations and interventions lie. Support for these sectors currently lies within small business development structures. There were comments in the interviews that suggested the sector as a whole would benefit from being more integrated.

We have also looked outside of the arts and cultural sectors for other examples of showcasing Wales.

RESULTS OF THE SURVEY

In this section we summarise responses and draw out key findings from the online survey, which took place through May 2018.

ABOUT THE RESPONDENTS

- 42% of respondents were from South East Wales and only 4.5% of responses came from the North East.
- Most respondents work in the visual (52%) and performing arts (49%); many also work in literature (28%), film/TV/animation (26%), music (26%) or across art forms (26%).
- Respondents predominantly work in education (67%). Many work in presenting, producing or digital platforms (46%) and festival production (26%), and some offer business (14%) and technical (12%) support.
- The creative and cultural sectors in Wales represented in this survey work a lot with young people (85%), children (68%) and the elderly (63%) as well as many other people and communities. Migrants and displaced people (32%) are of less focus. Respondents also mentioned language, students, women and rural audiences.
- Most respondents employ up to three staff (67%) and 5% employ over 50 staff. 24% take an annual turnover between £20-£100k and 1.7% make over £5 million annual turnover.
- Work is mostly financed from public/official sources (33.8%) and earned income (31.6%). 10.3% of work is financed by trusts and foundations, 8.1% by donations or the private sector, and 16.2% of work is financed in other ways.

ANALYSIS OF FINDINGS

There is an unequal spread of respondents across Wales which partly reflects the population densities of South East Wales and South West Wales but still shows an under-representation from North East Wales. The focus groups also showed a smaller than expected engagement from North Wales artists.

The spread of art forms showed a broad spectrum and respondents were able to pick more than one art form, which reflects this spread.

Of interest is the very high proportion of respondents who worked in specific fields, with young people, children and the elderly, for example. This suggests, as several interviewees have said, that one of Wales' strengths is its work in specialist areas: within education, health, with people with specific needs, in rural areas et cetera. These attributes are highly sought after in other countries and could well form part of the international arts and cultural offer.

The high proportion of organisations employing 1-3 people also is indicative of the difficulties in finding the time and capacity to engage in international work.

The high dependence on public funding is evident with 33.8% of funding coming from the public sector.

CASE STUDY

COMMISSIONING ARTISTS TO SHOWCASE ABROAD

Cymru yn Fenis | Wales in Venice

Arts Council of Wales and Wales Arts International, with support and collaboration from the Welsh Government and the British Council, have commissioned emerging and established artists to present their work as part of a collateral event at the Venice Biennale since 2003. In 2017 it was curated by Chapter in Cardiff and James Richards was the selected artist. Exhibited artists have subsequently been invited to show work in a wide range of countries and the curators noted enhanced professional development and additional benefits for their institutions and organisations.

- Budget for the two-year project is currently £400,000 and offers exposure to the Art Biennale's 300,000+ visitors, including 30,000 key international curators, critics, collectors and artists and political and cultural representatives who attend the three-day preview period.
- Related programmes include Invigilator Plus, travel bursaries, educational resources, talks, events, links, which are unanimously felt to have improved professional development.
- Where appropriate, a re-staging of the exhibition produced for the Biennale may take place back in Wales, or in other touring formats in the UK or internationally. For 2017, James Richard's installation emerged from a residency at the Royal Welsh College of Music and Drama. Wales and Scotland received a major support fund from Art Fund to tour their exhibitions from Venice in the UK.
- Wales' presence at the Biennale is considered to have made an extremely positive impact in building a profile and reputation for quality at an international level. The impact and benefits for artists, curators and the Welsh visual arts sector as a whole have included further exhibitions, residencies and professional development opportunities internationally. In addition, new networks and partnerships between representatives of national arts agencies and/or other governmental organisations have also been developed through a presence at the Biennale.
- A recent survey suggested more could be done to ensure awareness and coverage of the show's profile within Wales, especially amongst the general public. It was proposed that this should be linked to a longer-term, more consistent strategy for promoting Wales' visual arts sector as a whole.

experiencewalesinvenice.org

RESPONSES TO QUESTIONS ASKED

What do you understand by International showcasing and what is your experience of it?

We found that:

- International showcasing predominantly meant attending and participating in overseas festivals, fairs and events, overseas touring and exhibiting, residencies and exchange programmes, or attending and participating at Wales and UK based international events.
- 64% felt international showcasing is very important/high priority.
- 70% have attended up to 10 UK based international showcases (34.8% attended 3 or less) in the past 5 years, 16.7% have not attended any, and 3% have attended over 20 showcases in this period.
- Although 31.3% have not attended overseas international showcases in the past 5 years, 34.3% attended up to 3 showcases, 23.9% attended up to 10 showcases, 7.5% attended up to 20, and 3% attended more than 20.
- Popular international showcases in the UK and overseas include Venice Biennale, Edinburgh International Festival and Fringe, Edinburgh Showcase, CINARS, WOMEX, FOCUS Wales and Artes Mundi.
- Networking and creating new partnerships are seen as the key benefits of attending international showcases (72%), followed by seeing new work (62%), and learning approaches and innovations from other countries (59%).
- Top ambitions for international work and showcasing are to develop artistic/professional practice as well as new partnerships and collaborations. Other comments include raising the profile of Wales and its artists.
- If an international showcase initiative were to be held in Wales, the sector would bring great value through artistic/professional expertise/performances/exhibition (88%), and existing networks and contacts (64%). 25% could offer service in working bilingually.
- The top barrier to effective international showcasing is lack of funding to attend major showcases (74%), followed by lack of opportunities in Wales (64%) as well as funding to attend major showcases in the UK (64%). Respondents had many other thoughts to contribute to this topic.
- Respondents felt that enhancing existing international initiatives in Wales, particularly funding programmes, would have the greatest impact for international showcasing in Wales (61%) followed closely by developing new international commissioning/partnership programmes (59%) and strengthening the network of international residency programmes (59%).

ANALYSIS OF FINDINGS

The interpretation of international showcasing reveals a wide spectrum of responses with the top 5 out of 8 options scoring between 70% and 80%, suggesting that people find that it is the range of initiatives that is effective rather than favouring one single approach. Artist residencies also scored highly.

The high number of people attending UK international showcasing events (70%) suggests this is considered an effective strategy. Given this, it is surprising that 16.7% have not attended a UK-based showcase at all. With regards to attendance at overseas showcasing events, the figure of non-attendance rises, which could be to do with cost, capacity and access to funding. However, those that have attended show a commitment to doing so, with 34.3% attending up to 3 showcases, 23.9% attending up to 10 showcases, 7.5% attending up to 20, and 3% attending more than 20.

Over 150 different showcases are mentioned in Wales, the UK, Europe and wider international destinations with all art forms covered. The scale also stretches from the major festivals and biennales (such as Venice Biennale, Edinburgh International Festival, Sculpture Objects Functional Art and Design) to the more niche (Dark Days Iceland, Four Winds, and New South Wales, for example).

When ranking the benefits, it is interesting that networking and creating new connections and collaborations is ranked highest. People understand that relationship building is the most important part of international working. This takes time and does not necessarily have immediate results. There is often a struggle to evaluate the immediate outcomes of international activity, which is implied in this result. Seeing new work, developing artistic ideas and connections and learning new approaches are also ranked high on the list, suggesting that knowledge and expertise is important.

The ambitions for international work and what organisations can offer with regards to showcasing follows this trend by ranking artistic/professional practice and new partnerships and collaborations highest of the list of outcomes. Of interest in this question was the high number of respondents who cited raising the profile of Wales as a key desired outcome as well as developing Wales as a brand. There was also the offer of peer learning, studio visits and presentations.

WHAT ARE THE BARRIERS TO INTERNATIONAL SHOWCASING?

We found that;

The principal barrier is lack of funding to attend showcases overseas, followed by the lack of an opportunity in Wales to showcase work and lack of funding pathways to attend UK showcases.

The common theme is the scant resources for showcasing and the lack of strategic planning in Wales to support it; respondents make a strong plea for a more strategic and joined up approach of the public bodies in Wales to work together.

There is disappointment in the split between creative industries and arts and culture and a great deal of discussion about the complex funding packages that have to be put together that are not suited to international working. The proliferation of agencies with an interest in working overseas means that there is:

- *'Too much time-consuming administrative work involved in making applications';*
- *'Lack of unity in international strategy';*
- *'Lack of vision and financial resources with regard to translations and showcasing in Wales'; and*
- *'Poor transport infrastructure'.*

ANALYSIS OF FINDINGS

There is a greater emphasis on enhancing the current provision than creating new initiatives. Of interest is the idea of developing a commissioning/partnership programme as well as strengthening residency programmes. This suggests the sector is looking for the resources to carry out their programmes of work rather than wanting new vehicles from them.

It is also significant that attracting more international showcase events/trade fairs (across all sectors) to Wales is high on the list.

WHAT OTHER INTERNATIONAL WORKING EXPERIENCE DO YOU HAVE?

We found that;

- Although the UK and USA were the most common destinations where respondents have attended international showcases, Germany, Australia, Spain, France, India, and Canada are also popular choices.
- Relationships are brokered mostly through the individual/organisation's own relationships (84%). Professional networks are also an important broker (51%) followed by Arts Council of Wales/ Wales Arts International (35%) and the British Council (23%).
- Relationships are initiated through predominantly personal/professional contacts (86%). Attending showcases in the UK and overseas contributes to 68% of relationships being formed, 52% come from invitations from promoters/curators/festival teams etc. 10% from cultural institutions and only 5% from embassies or cultural attaches.
- Work is mainly funded through respondent's own resources (76%). Arts Council of Wales contributes 51%, overseas promoters (36%), and the British Council or other cultural institutes (22%).
- 32.7% of overseas work contributed to the overall budget of major projects over the past year. In 9% of cases this work contributed between £100,000 - £500,000. 30.8% found that overseas work costs money, most often up to £5000 (73%).

ANALYSIS OF FINDINGS

Most of the international showcases attended have been sector-specific rather than cross-sectoral.

Most connections have been made through personal/professional relationships rather than agencies or embassies; this illustrates the value of networking and peer knowledge exchange activities.

Only a third of the respondents said that the activity contributed to their overall budgets. This suggests that the return on investment is judged by non-financial gain and/or that some of the programmes such as the EU-funded programmes mitigate against making a financial profit. Further research is needed on understanding the finances involved in overseas working.

WHAT DO YOU CONSIDER THE KEY IMPACTS OF INTERNATIONAL WORK?

We found that;

- Respondents tell us that the key benefit of international work is increased professional standing and profile within and outside Wales (82%) and increased professional/artistic skill and inspiration (81%). Increased financial viability and capacity were not so well achieved at 18% each.
- Difficulty accessing money for project delivery (68%) as well as research and development (58%) and insufficient time and resources (59%) are top obstacles to developing international work. Overall, the sector does not feel that a lack of artistic skills is an obstacle.
- The kinds of support that would help develop international relationships and subsequent work considered most helpful are a strategic framework for international working (60%) and flexible long-term finance (58%).

ANALYSIS OF FINDINGS

Research demonstrates that the important impacts of international working are the increase in profile and artistic/professional stimulus, as opposed to short-term financial returns. This suggests that these impacts need to be factored in when calculating the return on investment.

The key barriers to increasing international work are access to funding, lack of time to develop programmes and the lack of a strategic framework within which to work. There is also a desire to have greater access to brokers/producers: the professional intermediaries who can facilitate relationships.

A clear steer from the sector is the need for a greater strategic framework and a shift in the ways that finance is administered to create a longer-term and flexible finance system.

Other comments include the need for long-term and sustained investment.

WHAT ARE YOUR INFORMATION AND SKILLS NEEDS?

We found that;

- Top ways to find information on international showcasing are from respondents' own knowledge gained from networking (78%) and from colleagues/peers/word of mouth (76%). Others also noted social media, desk-based research and information from international partners or funding bodies newsletters.
- Email bulletins are the preferred method of delivery for information on international showcasing (92%) followed by social media alerts (38%), newsletters (32%), and in person.
- Skills are best developed by networking and peer development (79%) and training days/ workshops (73%). Online resources are not quite as useful with 25% preferring this approach.
- 16.9% of respondents have grown an audience over 10,000 in Wales, 13% of respondents have an audience over 10,000 in the UK and only 5.5% have managed to grow an audience over 10,000 internationally.

ANALYSIS OF FINDINGS

Overwhelmingly, people say they get their information from peers and from social media/online. This underlines the need for networking and knowledge-sharing events and initiatives.

KEY FINDINGS FROM INTERVIEWS WITH 47 INTERNATIONAL PRODUCERS, PROMOTERS, CURATORS, AND FESTIVAL DIRECTORS

We asked; how do producers, promoters, curators, and festival directors discover and programme new work? We asked them for their views on Wales arts and artists and how best to showcase work from Wales.

Without exception, they said that there is an interest in work from Wales as there is a constant appetite for the new, the niche and the innovative. When asked how producers find work and create their programme, most established festivals say that artists generally approach them, either independently or through managers, agents or publishers.

We heard, consistently and repeatedly, that the creative programmer or curator is of paramount importance. They are the trusted name and authority. The provenance of the programme is all-important. Showcasing from political or promotional reasons are eschewed and treated with deep scepticism. One promoter said,

'Paying for me to come to Wales is not the issue. All promoters can raise the budget to go and see work. What matters to me is time. I need to be assured that I will see good quality work (and not just from Wales), see interesting ideas and programmable work i.e. work that is export ready, and meet and network with my peers'.

This was true of the museum sector, visual arts and performing arts.

Those speaking for music festivals and showcases expressed even stronger views and said that the selection and direction of festival programmes needs to be done by agents or industry specialists. Green Man, Celtic Connections and Lake of Stars all stress the industry involvement in selection, and criteria such as airplay, evidence of tours and established venue circuits, and good management.

In addition, both Womex and Showcase Scotland (part of the Celtic Connections festival) stressed the need for the artists to have established infrastructure behind them – which is evidence of good quality management and agents – and they stressed the damage that can be done by showcasing too soon. Womex suggested that it was important for artists to attend international events not to play but to learn how best to promote themselves when they are there. These soft skills can be as important as the artistic product

Trust in the selector's taste and choices were universally acknowledged to be the key to a successful showcase. The perception of Wales was that it is still public-sector led – that the Welsh sector representatives at the major international showcases are from the public sector rather than industry specialists.

Liverpool Biennale and Jaipur Literature Festival both noted that their curators and programmers are on the road constantly, making connections, building networks and not only promoting their work and festivals but listening and engaging in the international dialogue and debates. Crafts and visual arts have benefited from improvement in digital imaging, but seeing and touching work is still critically important.

In terms of the kinds of showcasing events that promoters attend, the main promoters tend to trust their teams to visit and report back from the major showcases, while they themselves have more of an interest in the new and quirky niche festivals. Next Wave at Brooklyn Academy of Music for example is popular because it is experimental and small. Le Guess Who? in Utrecht, Jodhpur RIFF Festival in Rajasthan, Airwaves festival in Iceland, and Ocubo Alberobello Light Festival from Portugal all show that niche is successful.

We also asked, what do you think are the challenges for Wales in the Showcasing arena?

When asking about the shortcomings in Wales, the most commonly cited failing was its invisibility in the field. This was thought to be partly communications but also the lack of continuity in its strategies, that there is still too much of a short-term approach.

It was also said that artists themselves are not seen enough in the international fora and that presence at showcasing is considered erratic and not sustained compared to other small nations such as New Zealand, Scotland and Quebec.

One commentator said the narrative of Wales is poor. He went on to say that Celtic music has become mainstream and Wales has not been able to capitalise on this. Other commentators said that Wales does not exploit its bilingualism enough. This was echoed, though not so forcefully, by the museum sector who felt that the Welsh sector was not visible enough in UK programmes and that there is still work to be done to communicate the richness of the collections to UK agencies as well as overseas.

International curators expressed the view that the artists working in Wales were also less proficient at positioning their work in the international arena. They suggested that visual artists lack the vocabulary to talk about their work. Curators work with artists around the world who are more conversant with the language and vocabulary of the international art world and critical analytical approaches.

'Creating good and exciting work is not the only thing that matters when trying to showcase your work'.

This theme that Wales creates good work but that it is not always export-ready was evident in all sectors.

There is a need to encourage not just producers and curators but also the media to come and see work and to encourage them to stay to see the ancillary work, and particularly the engagement work for which Wales has a growing reputation. Jaipur Literature Festival does this with a fully integrated booking service for the public as well as delegations through an agreement with the tourism and experience sector, so when people buy tickets they can also book accommodation and visits to nearby sites of interest.

'Jaipur is a beautiful city and they throw a good party – emphasis on looking after the audiences'.

The Great Escape in Brighton also extends into the city with the same kind of approach.

There is a need to capture and stimulate peer learning. This is both with regards to the practical issues of international working (such as visas, logistics et cetera), and deeper relationship-building. Long-term sustainable links are facilitated by a more strategic approach and sharing of knowledge, contacts and experiences.

The perception is that there is a weak infrastructure for artists in residence in Wales. However, through the focus groups, it became clear that there are many residency opportunities, particularly in Mid and West Wales, but these are informal and not widely known.

Marketing, imagery and thinking about the audience for which work is being made is not high on young artists' and makers' agendas. Funding bodies should scrutinise budgets more closely and ensure that sufficient resources for marketing skills and materials are in the final agreed budgets.

It was felt too that the proliferation of agencies in Wales dealing with international arts work is counterproductive and a clearer route through these agencies is needed.

'Understand that the non-strategic nature of the funding is holding Wales back – the example of Keeping Faith finding money for distribution was very difficult. Look at Canadian Council and Quebec as a funding model. Proper investment in arts and cultural industries is cost effective. Wales should offer incentives for international cultural export. It needs integrated systems not "territorial" funding so that small steps build to larger ones and investment follows success'.

SUMMARY OF FINDINGS AND KEY ISSUES

1. There needs to be significant development of exportable work

There is a need to develop the right work that is export-ready and tourable. This includes timing of shows and the ability to re-stage and re-rehearse. 'The Gentle Good' and '9Bach' performing in Pontio is an example of great work being produced that is unable to be re-staged and was only seen once. It also means having awareness of language issues, using surtitles, and translating texts for book fairs etc. The international sector likes innovation and quirkiness. There is a real appetite for culturally specific work, which challenges professionals as well as the public. To achieve this, we need to:

- Ensure funding cycles allow for re-staging and showcasing rather than the creation of new work.
- Nurture the new and the niche work for international markets.

2. There needs to be significant sector development

There is a need to develop both the quantity and the quality of intermediaries (curators, producers, agents and managers) in Wales. Professionals need to travel more and make connections. In order to achieve this, we need to;

- Set up a structured mentoring scheme for knowledge transfer between peers.
- Create a more targeted scheme for travel to showcases and networking events with a requirement to feed back to the sector via online or offline sharing events.
- Create a system of work shadowing and internships alongside the experienced international producers who come to Wales (and who work outside of Wales). As a model, Liverpool Biennale has 10 associate artists in the North of England each paired up with the international ICI curators. They are mentored for three years and have a budget of £12,000 to travel.
- Develop the scheme of a network of international scouts and tour bookers in the way NoFit State Circus has done with Camille Baumier or Scottish Dance Theatre with Nelson Fernandez.

3. There needs to be development of communications skills

The creation of international promotional material, both online EPKs (Electronic Press Kits) and offline, together with the negotiating skills for making deals, softer skills and networking prep for artists travelling to showcases are required. The performance is only part of the job. In order to achieve this we need to:

- Develop a cross-sectoral approach to communicating both the Welsh offer and the timeframes. Ensure strong links with the UK Culture Diary.
- Develop training packages to upskill the public sector. Welsh Government overseas offices, British Council and FCO overseas networks need to know more about the opportunities in Wales (residencies, festivals, venues et cetera), the timing of major events and the key export-ready Welsh artists and cultural organisations. This would include expert services such as the arts and health, arts and older people, creative learning in schools and so on.
- Create an international consortium of agencies to promote and support the major initiatives, offering integrated packages of information, accommodation and experiences to maximise the impacts of attenders.
- Develop a greater awareness of residency opportunities in Wales through greater links with ResArtis or through a Wales-specific register.
- Ensure marketing has a higher priority in funding agreements to ensure both maximum impact of attendance at events and information available for interested promoters and bookers (part of being export-ready).

CASE STUDY

DENMARK: A CROSS-SECTORAL SHOWCASE

Aarhus European Capital of Culture 2017 'Let's Rethink'

Aarhus and the 18 other municipalities in the Central Denmark Region chose to celebrate the folkelige traditions and the best that contemporary culture can deliver in art, theatre, dance, music, literature and artisanal practices such as gastronomy, architecture and design in their year as European Capital of Culture in 2017. 'A project WITH the city, not just FOR the city'. Aarhus aims to create sustainable development: cultural, human and economic growth inspiring citizens to live work and participate in the European Region.

- Involved 600 cultural organisations, 680 companies from the creative sector, 900 participants in 4 conferences, 2,800 participants in seminars and workshops, 12,000 visitors to exhibitions with presentation of projects and 24 publications.
- Cost £1-3 million in programming costs alone but it created 1,965 jobs. Generated a turnover in the private sector of £141 million. Received £47 million in public sector investments, which led the cultural projects turnover in the Central Denmark Region to increase by 3 times the public contribution. Every £1 spent brought back £1.4. Cultural projects increased the gross value added in the private sector by 1.5 times the public contribution. Private contributions were £13 million, the cultural projects increased the gross value added in the private sector by 5.4 times the private contribution.
- Governance: governed by a foundation and independent commercially-operated organisation not within a regional or city council.
- Five-tier communications strategy working with the Foreign and Commonwealth Office and all Danish embassies on international, diplomatic and tourism campaign. Launch in London that engaged with media national and internationally.

aarhus2017.dk/en

WHAT DO INTERNATIONAL PROMOTERS AND CURATORS THINK OF WALES?

Whilst the majority of respondents were complimentary about the work created in Wales, the majority also said that the work is still invisible. *'A State waiting to be explored'* is how one international promoter described it. However, a common theme was that Wales is often best-known through its artists such as Cerith Wyn Evans, Cerys Matthews and Bedwyr Williams. Artes Mundi was cited many times as a great example of quality work hosted by Wales that allowed the international conversation around visual arts to be conducted in Wales. Similarly, the Hay Festival is recognised as world-class and reflects well the values and literary qualities of Wales.

Those that know the work say that the artists need bigger exposure but need training in how to do it and need to develop networks. The common thread is that more international curators need to come to Wales, and the artists need to get out more.

'There is an incredible offer in Wales but it is too quiet. It needs to be clearer and bolder'.

Many of the interviewees commented on the fact that bilingualism was a positive USP for Wales, compared with other nations within the UK, and could be treated more positively. It was noted that surtitling is ubiquitous now (for example, in Germany everything is surtitled into English) so Welsh work should travel better.

There was an acknowledgement that much of the work is also decentralised and outside of the main venues and this, too is a strength and of interest to other countries.

'Stories [are] told in fresh ways not in conventional venues – it gets under the skin of the place it reflects and catalyses'.

'Welsh National Opera – tours through England with a fresh and contemporary model'.

The country has a reputation, largely built through National Theatre Wales and through historic memories of Brith Gof, of producing excellent site-sensitive work and this creates a unique aesthetic, which could be exploited more. Comparisons were made with work from Flanders.

Chris Gribble from the Writers' Centre Norwich saw parallels with Norwich in as much as there is a tension between the perception and focus on tradition but also contemporary strengths.

There was a consensus that people needed to come to Wales and get to know it better. Promoting opportunities such as artist residencies and fellowships would be a useful step.

IN SUMMARY

The arts and culture in Wales are one of the most powerful ways of promoting the country and currently this is not being exploited as well as it could be. Wales' public bodies and major cultural organisations need to work together to ensure there is a more coherent narrative being communicated.

There is a need to invite more industry delegations to Wales and to be clear about the quality and the aesthetic that is on offer.

There is a need to invite more industry-led events to Wales and to showcase within those not only the sector-specific work but the wider cultural offer and the landscape and people of Wales to create a greater sense of a place that rewards further exploration.

Hosting major international events has a proven impact as evidenced by Womex 2013, IETM satellite in Cardiff, and World Stage Design Cardiff 2013. Suggestions for beneficial future hosting opportunities include:

- Manifesta
- Independent Curators International
- Cineregio
- Classic Next
- American Association of Museums conference
- IETM.

CASE STUDY

CROSS-SECTORAL SHOWCASE IN WALES

The National Eisteddfod of Wales

An annual eight-day competition-focused festival in Wales that travels from place to place, alternating between north and south Wales, and is a celebration of the country's culture and language.

- The Welsh language is an integral and important part of the Eisteddfod. Translation services are available.
- The Eisteddfod costs over £4 million per year with a target of around £325,000 for the local fund. It attracts around 150,000 visitors, over 6,000 competitors, 250 trade stands and stalls. A significant percentage of the economic benefit to the local area during the Eisteddfod goes to the tourism and hospitality sector with almost 70% of visitors spending at least one day exploring the area.
- Most of Wales' leading writers, musicians and poets have competed at the Eisteddfod, and for many performers it is the first time they have appeared on a national stage.

eisteddfod.wales

WHAT IS THE MOST EFFECTIVE WAY OF SHOWCASING ARTS FROM WALES?

Responses to the question of the most effective methods of showcasing varied in specifics but had some generic principles in common:

- There needs to be an innovative, inspirational approach that reflects the people, aesthetic and culture of the place.
- There should be a defined marketplace for the work that can attract enough venue leaders, directors and bookers interested in buying work.
- International market development is very different in different art forms. It is best to identify the strongest marketplace for each art form and go from there with the right curatorial programme. There is no point in re-inventing Tanzmesse, Cannes or CINARS.
- Wales needs to only set up where there are gaps or a unique offer. Perceptions of the unique offer include Festival of Voice, site-sensitive work, bilingual focus, enhancement of Eisteddfod, and new technologies.
- It will be important to work alongside existing venues, festivals, promoters and the sector itself to ensure synergies rather than competition.
- It takes time to develop relationships and see results so it would be wise for investors to commit to a multi-year funding award.

As the sectors (or sub-sectors) are at different stages of development and have different professional infrastructures, the following is a list of initiatives suggested by the interviewees, focus groups and online that are sector-specific.

These suggestions are in addition to the major recommendations on a cross-sectoral basis and should be considered alongside those:

VISUAL ARTS

- Develop Artes Mundi to include a more targeted industry focus, bringing more curators to Wales to see Welsh work alongside the Artes Mundi exhibition. This could include symposia with inspirational speakers. Continue to tour international artists through Wales and add Welsh artists alongside.
- Develop Wales in Venice. In particular, build on the connections made during the Biennale to grow active and ongoing collaborations.
- Bid to bring Manifesta to Wales; this would have a significant and lasting legacy.
- Address the gap in commercial artist representation in Wales. Curators are playing this role a little but cannot represent them. There is a need to attract and support commercial galleries (not necessarily through funding), and to develop the training of independent agents and curators to be proactive internationally. It would also be useful to support well-established selected galleries, such as g39 and Ruthin Craft Centre, to initiate commercial developments.
- Create a programme for Wales' curators to develop more of an international reputation by having a more consistent presence at major events such as Sao Paulo.
- Create more opportunities in Wales for work to be showcased. This can be done by developing the ability for the current network of galleries, exhibition spaces and artist-led agencies to promote more Welsh artists and to invite more national and international curators.
- Develop and promote a network of international artist residencies.



James Richards, Migratory Motor Complex, 2017 at Wales in Venice. Image credit: Mark Blower

CASE STUDY

INVITING DELEGATIONS FROM UK TO WALES

FOCUS Wales

An international multi-venue festival in its eighth year taking place in Wrexham, North Wales. Established to provide the annual new music showcase event for the Welsh Music Industry, presenting emerging local talent alongside a selection of new acts from across the globe.

- Attracts over 8,000 visitors, showcases over 200 bands in a variety of spaces and music venues, and pulls in experts for an interactive programme presenting industry panels and discussions. New 'Digital Innovations' strand encourages entrepreneurship in digital/creative sector.
- In 2017 FOCUS Wales value to the local economy was estimated at £330,000 with that figure set to rise for 2018 and thereafter as audience figures continue to grow.
- A number of international FOCUS Wales events are delivered throughout the year, as well as bespoke educational outreach programmes.
- Increasingly, FOCUS is taking on the role of an export agency by having a presence at international showcases and taking bands out to Korea, SXSW, for example.

focuswales.com

CRAFTS

- Focus on specific markets where there is a common or appreciated aesthetic, e.g. Japan, North America, Northern Europe.
- Bring curators, collectors and museum sector into Wales and develop an industry event around existing resource (specifically Ruthin Craft Centre; this could be a UK-wide event as Ruthin is highly regarded across the sector in the UK, and beyond).
- Build participation into international showcase events, such as Collect, into strategic support (rather than project-to-project funding).
- Prioritise strategic leadership for potential flagship events such as Aberystwyth Ceramic Festival. Facilitate international partnerships such as with NCECA in North America, Ceramics Expo Tokyo or Guldagaard Denmark.
- Create more substantial pathways and links between education and professional practice so that the more aspirational degree courses such as ceramics at Cardiff Metropolitan or textiles at Coleg Sir Gar have leaders that are well versed in international platforms/showcases.
- Celebrate and involve the many alumni who could act as role models and mentors for the sector, such as Ross Lovegrove, Bethan Gray, Adam Buick et cetera.

MUSIC

- Build on successes such as Womex and the Horizons initiative, Green Man, FOCUS Wales, Fire on the Mountain, Festival no 6, and Sŵn Festival etc.
- Build on the Sound Diplomacy initiative in Cardiff particularly around ensuring the infrastructure of small venues for live music is supported.
- Create a more integrated infrastructure for the various music genres with Ty Cerdd or Wales Music Export Agency etc.
- Create opportunities to showcase in domestic showcases such as Manchester, Brighton or London as well as Wales and overseas.
- Encourage artists to go to the major international showcases. South by Southwest may not offer as significant return on investment in terms of bookings for bands but it is an important networking and upskilling event. Artists need to ensure that both their work and their management is export-ready before participating in showcasing.
- Develop a more sophisticated marketing and communication strategy for classical music from Wales. There is a strong and well-earned reputation for contemporary classical music from Wales but more could be done to communicate new work and artists in the field.
- Invite Classical Next, IAMAA, Europa Opera or Reseo to host their conferences in Wales.
- Communicate the engagement work done by orchestra and opera companies particularly to the overseas market to capitalise on Welsh specialism in the field.

THEATRE

- Create a funding stream for re-staging work for showcasing and eventual re-touring.
- Create major event(s) attracting more producers and promoters to Wales.
- Create more links between London (still a strong magnet for international promoters) and Wales to build on the one-off transfers such as *Iphigenia in Splott*.
- Develop more partnerships with organisations such as LIFT or the Southbank Centre, new writing venues et cetera.

LITERATURE

- Build on the recent participation at the London Book Fair through the International Literature Stakeholder Group and extend the model to the Frankfurt Book Fair.
- Create more export-ready texts in translation to make this effective.
- Create international projects for major celebrations (such as Dylan Thomas, Roald Dahl, Hedd Wyn/Poetry of Loss).
- Promote writers' prizes, such as the Dylan Thomas Prize, Welsh Book of the Year and Eisteddfod Chair, as publishers look at what will help writers stand out against the crowd.
- Develop and promote international artist' residencies, which are also deemed to be very important both as career development and also as creating a greater body of knowledge about the sector globally.
- Create a more sustained attendance by publishers at showcase events as a high priority. Publishers also cited the dominance of English in UK writing fora and UK international fora as a major barrier to Welsh publishing and writing.

FILM, TELEVISION AND NEW MEDIA

- For film, it is vital to build relationships with the sales agents; they will go to the major festivals that have all the key people in one place. These are Cannes, Edinburgh, Berlin, Galway, Venice, Toronto, Sheffield (for documentary), Malmo (for children), Annecy et cetera. Wales needs to go with a slate of 50 projects to be 'seen'.
- The film sector in Wales is quite dynamic and good at innovation. It has been very much helped by television and is set to become a major UK hub if a number of elements come into being.
- IRIS has been successful at profiling Wales and so has the Cardiff Animation Festival. There is a move to reinstate the Animation Festival, which would bring a very big return. There are also a number of niche festivals, such as Wicked (short films), Abattoir (horror film festival in Aberystwyth) et cetera.
- Film could enhance any overseas international showcase from Wales as it is varied, high-quality and portable.
- Major film events such as Cine Regio could be brought to Wales, and if it could coincide with IRIS or PIX it would enhance the impact.

DANCE

- Prioritise attendance at the major dance festivals – Tanzmesse is a key platform to have consistent Welsh presence as is CINARS – though more as a networking event since the programme is tightly curated.
- Build presence at other European trade events, such as Aerowaves.
- Cardiff Dance Festival should be supported to build a showcase element into future festivals: two or three days with a trade focus. It is currently the best placed home-grown initiative in Wales to attract dance promoters.
- Continue to attract the major UK and European dance showcases to Wales: the successor to the British Dance Edition or Informal European Theatre Meeting IETM.

HERITAGE

The museum sector also suffers from lack of visibility particularly given the richness of their collections. Their principal method of showcasing is through attendance at sector-specific conferences, academic symposia and overseas events such as tourism and trade missions. Keepers and curators need to travel as advocates as it is not economic to move collections around the globe.

- Develop a programme for attendance at key international events.
- Create a programme of hosting key sector events such as the American Alliance of Museums, International Council of Museums and the Museums Association Conference.
- Promote the considerable and very specific skills and expertise in public engagement, building diverse audiences, connections with schools and young people and hard-to-reach groups such as homeless people etc. These skills could be exported alongside or separately from the collections.
- Promote the innovative work done on curation. The National Museum has recently been in the forefront of the debates about curation and decision-making with their programme Who Decides, which challenges the traditional role of the curator. This innovative approach has extended into the redevelopment of St Fagans where there had been a programme of co-collection and engaging communities in the work of co-curating.
- Develop the understanding and knowledge in the public sector of the value that museums and heritage play in soft diplomacy, highlighting shared histories, stories and common experiences. Examples include the work of the British Museum in Iran. In Wales, the recent work in both China and Japan has achieved a great deal more than simply promoting the collection; these impacts extend to diplomacy, trade and deeper links and connections. To achieve greater visibility of the sector, strategic partnerships with other agencies, particularly Welsh Government, are vital.
- Develop a mechanism for horizon scanning for significant anniversaries and opportunities to link with major events and celebrations.

CASE STUDY

SECTOR-SPECIFIC SHOWCASING OUTSIDE WALES AND ONLINE

The International Literature showcase

An integrated showcasing model for literature that included a four-day conference in Norwich; an online platform with profiles, commissions, and links to external content; participation at London Book Fair, and a Slack discussion forum based around commissions and small grants for partnership projects.

Aims were to;

- Export: to provide a resource for international programmers, literature professionals, publishers and cultural-diplomatic bodies to access information about, make connections to, and programme partnerships with, UK writers and literature professionals.
- Learning and Networks: to create a professional development environment that fosters the international exchange of best practice and facilitates a network of future literature leaders who look to the UK for collaboration.
- Sector development: to increase the capacity and skills of the UK literature sector (individuals, organisations, networks) to work internationally with a special focus on digital showcasing skills.
- Showcased 92 UK writers, artists, performers and 53 literary organisations, practitioners and activists. Engaged 150 literature professionals from the UK and internationally as active delegates, an audience of 40,000 live and online, and achieved a 40.4% open rate on newsletters.

litshowcase.org

WHAT ARE THE CRITICAL SUCCESS FACTORS FOR INTERNATIONAL SHOWCASING EVENTS/ INITIATIVES?

We found that:

- The programme is very important. Extraordinary impact is necessary – there must be a draw for the public and audiences. So, the quality of the programme is paramount but connection to the local people needs to be an important part of the journey. It needs to do more than just “invite and present” but to cultivate a real link to local artists and audiences.
- Community engagement is important; both Jaipur and Lake of Stars Festivals have a high degree of involvement with their local communities and target traditional non-attenders through a variety of innovative methods. Lake of Stars had a mobile clinic and HIV advice. Jaipur set up reading clubs in remote villages and invited 12 people to come to the festival.
- There must be a clear understanding of the market gap and the event must be unique and special.
- If showcasing the best of Welsh work, it needs to be within a rich programme of international work, which has been curated by professional programmers and industry specialists
- There must be an understanding of what is interesting to presenters and that it is not necessarily interesting to the audience/visitors. Empathy with all audiences is vital to success.
- In terms of the audience/delegates there must be a realistic target of producers and a good understanding of where the work is likely to get placed internationally. What matters is that the right people are there. There must be rigour in the conditions for attending and the results should be monitored closely.
- Delegates must be treated well and offered a whole experience, not just attendance at the showcase.
- Timing and time frames are very important. Producers and curators will come because of who and what is there and will not attend for more than three days. Ensure that the timing is coherent and does not clash with other major initiatives.
- There should be the maximum exposure possible. For example, it should be possible to link the timing of Artes Mundi, Cardiff Contemporary, Festival of Voice and BBC Cardiff Singer of the World, but it would need time, independence, finances and will.
- Leadership and governance are very important. Successful showcases are led by producers and curators with autonomy and experience, and by organisations with strong administrative capacity. For example, 25% of Manchester International Festival staff are creative programmers or producers.
- Development directors are also vital. Successful cultural programmes have employed development directors from the sports sector for large-scale sponsorship expertise.
- Ensure a strong connection with the industry, particularly if there are showcases/prizes involved. As an example, Green Man Rising is taken seriously as the judges are all from the industry.

WE ASKED HOW DO WE ENSURE LEGACY AND RETURN ON INVESTMENT (ROI) FOR WALES?

- We found that we need to: Develop a training and mentoring programme to build the skills of local artists who can then build scale. Create pathways to the experience of working internationally. Offer training for young people age 16+ in arts careers in wide-ranging fields, including technical, administrative, communications et cetera, rather than just on stage.
- Develop a strong participation and learning programme using innovative techniques in how to teach, inspire, and explore what it means to engage with communities and individuals.
- Create inbound and outbound partnerships and residency programmes.
- Aim to connect more with local narratives and democracies. Tell compelling local stories that resonate with international visitors.
- Run a year-round programme of activity alongside the Festival like Greenwich and Docklands International Festival, Liverpool Biennial, Showcase Scotland et cetera.
- Content should reflect the demographic. If there is a Wales-themed approach it needs to be sensitively considered and thorough; it should present a new view or understanding, even if this is a subjective understanding of what is happening.
- Understand and track the audience and create a community with the attenders.
- Programme work relating to the places where tickets are bought from, for example the USA, Australia, Norway or France, to build loyalty.

HOW DO NON-ARTS SECTORS DO IT AND WHAT CAN THE CULTURAL SECTOR LEARN FROM IT?

We found that:

Chambers of Commerce

Chambers of Commerce/City Chambers of Commerce have provided a range of business services and independent representational support to UK companies and organisations for over 200 years. They are found around the world but are at their strongest in Europe. They invariably have strong links with British Embassies.

The British Chambers of Commerce (BCC) is a member of Eurochambres and many other networks. Years of taking trade missions abroad, receiving delegations, signing protocols, and organising trade fairs have resulted in Chambers of Commerce having a vast network of practical working relationships throughout the world.

Their main strength is in advice, information and connections. They can tap the knowledge and expertise of expatriate businesses. There is not an immediate corollary in the cultural sector but the emphasis on the value of networking, particularly in EU funding, shares this acknowledgement of the importance of peer learning and knowledge exchange.

In some respects, the British Council fulfils this role, but it would be useful for the cultural sector to link up with the local Chambers of Commerce for export advice.

Higher Education

The Higher Education sector in Wales and the UK has expanded exponentially over the past 20 years and international students are now a vital part of the higher education economy. Cardiff Metropolitan University is a successful example of this. Their Transnational Education Network has 14 active partners delivering Cardiff programmes overseas to between 6,500 – 7,000 international students studying overseas. They also attract around 10% of the 12,000 students on their Cardiff campus from overseas. They have four international offices in Vietnam, Nigeria, India and China, which work for Cardiff and play a role for Wales.

Trade fairs have been very successful for promotion and development, for example with the participation in Going Global Bologna and Magna Charta Observatory.

They have been very engaged and successful with EU programmes leveraging €30million over the last 10 years and are one of the UK's most successful Universities in this field.

They provide opportunities for staff and students to go overseas and develop on a global scale through funding initiatives, partnerships and networks, which in turn promotes Cardiff and Wales.

They work closely with the British Council and feel that there could be more co-ordination with other Welsh Government departments to maximise the potential.

Welsh Government

The objective of the Welsh Government's international policy is to gain economic advantage on the ground in Wales. Trade and investment activities are intended to attract foreign direct investment and to increase exports. There are more than a thousand companies in Wales that are foreign-owned.

The UK leaving the EU is of concern to Wales as 66% of Wales's exports currently go to the EU. Therefore there are two priorities: the development of emerging markets outside of the EU and maintaining links with the EU post-Brexit.

The Welsh Government is investing in its international reputation and reach by expanding its current network of 15 trade- and invest-focused overseas offices. These are located in London, Brussels, China (Beijing, Shanghai, Chongqing), India (Bangalore, Delhi), Ireland (Dublin), Japan (Tokyo), UAE (Dubai) and the USA (New York, Washington, Atlanta, San Francisco, Chicago), and further offices in Montreal, Paris, Berlin, Dusseldorf and Qatar (Doha) will be added in 2018. The UK policy is to have a single platform approach and so the Wales offices work closely with the Foreign and Commonwealth Office and UK Embassies.

The Welsh Government recognises the role of culture in creating influence and soft diplomacy, particularly around the communication of Wales' values internationally. They also acknowledge the need for culture to have breathing space to be itself and have its own relationships and *modus operandi*. They are keen to strike the appropriate balance between using culture to help in the promotion of Wales, making it an attractive place for relocation, investment, students to study, tourism and supporting the export of culture as an industry in its own right.

There is an acknowledgement that there is currently a misalignment between the cultural sector and the government/public sector bureaucracies with a plethora of departments having an interest in the cultural sector's international profile, and that there is a need to bring these together in a more co-ordinated and collaborative way to avoid duplication.

CASE STUDY

INVITING YOUNG CREATIVE ENTREPRENEURS TO WALES

Kick Start: Cardiff

As part of an EU co-funded programme, Visiting Arts hosted a three-day exchange and networking event in Wales in 2017, which coincided with Sŵn Festival and Creative Cardiff's Second Birthday.

- The event aimed to bring together emerging international creative voices within the thriving arts and creative industries scene in Wales to spark exchange and explore their value and role in regeneration.
- It cost £33,000 and was attended by 100 arts industry professionals and influencers including 30 international delegates from 20 countries. A number of collaborative projects are being developed by the delegates including a mobility exchange programme with Latvia and a Welsh artist has been invited to participate in a graffiti project in Budapest.

visitingarts.org.uk/our-networks/creative-tracks

WHAT THE SECTOR IN WALES SAYS: FOCUS GROUPS ANALYSIS

A fuller analysis of the focus groups is in Appendix 4.

Five main questions were asked:

1. From the point of view of the artist, maker and creatives, what in your experience is the best way of showcasing the arts from Wales?

Artists and arts organisations need to start from a solid base. There is a need to get domestic funding in place that is long-term and in step with international showcasing cycles and is flexible.

Artists need good self-presentation: a good online profile and a good profile in the major presenting places in the UK (London, Manchester and Edinburgh) as well as overseas. It was acknowledged that some training is important but so too are the nurturing of intermediaries.

'We need agents to bridge the abyss between the artist and the market'.

Agents are really important, especially in bridging the gap, which is particularly true in visual arts and music. So too are the early opportunities, for example the network of music venues, new writing companies such as Paines Plough, and venues that nurture new talent such as Cambridge Junction. There is some work done at Pontio and FOCUS Wales in North Wales, Wales Millennium Centre in Cardiff, Martin Tinney and Gallery 10 for the visual arts but, in general, agents and brokers tend to be outside of Wales.

The question was asked, 'Is England an international event? We can get support to go to Bilbao but not to Brighton'. Clarity from funders was requested. The point was made that Radio 3 and London is where the network for classical music is and also where the blockage is. Strategies to build stronger relationships and networks are important.

Networks are important. They can help with the transfer of knowledge and skills as well as profiling work. It is crucial for more Welsh artists/cultural organisations to participate in networks and also to bring the major network conferences to Wales. Examples of effective networks include festivals and platforms, Eurosonic and European Talent Exchange Programme Yourope. All EU funding now goes towards developing audiences and the markets it incentivises.

Prizes can form an important platform for promotion, particularly in literature as they give profile to artists.

Reciprocity is important as the development of relationships is what really builds effective international programmes.

CASE STUDY

SECTOR-SPECIFIC SHOWCASE IN WALES

Agor Drysau /Opening Doors

A niche sector-specific biennial festival which ran for eight years in the West coast university town of Aberystwyth and gave young Welsh audiences the chance to see top theatre from Wales and abroad.

- In 2014, total spend was £133,000, with over 4,000 visitors, 121 artists, international directors, invitees and representatives from 24 countries attending.
- The main part of the festival is a four- or five-day event with a programme of around 40 events, including 16 – 18 productions from Wales and other countries. Performances of the international productions are arranged in theatres in other parts of Wales. An academic strand of discussions, workshops and seminars is offered for Welsh and international professionals and for students.
- International promoters, bookers and festival programmers see the productions alongside local young audiences and a 'fringe' or 'off' strand section provides space for new work, work-in-progress, or work by students and young professionals.
- The host company Cwmni Theatr Arad Goch has toured and performed abroad often: for instance during the last three years they have delivered nine tours to Catalonia and France, and other visits to perform in festivals in Russia, South Korea and Tunisia.

agordrysau-openingdoors.org.uk

2. From the point of view of the producer/promoter/festival director/venue manager, what are the most effective ways that you have experience of seeing work to programme?

Producers and promoters require funding to travel to international events, and the development of effective networks was also highlighted as an effective way of seeing work to programme.

Importance of researching the market position and knowing your audience and what you want to achieve was emphasised. The example given was of the Dinefwr Literature Festival, that aims to be different and has achieved significant success.

Venues and festivals choose their work and programmes from endorsements from different trusted sources. They look at existing networks.

Promoting Welshness is not helpful. Showcasing the best work from Wales and beyond together is the most successful.

Sector-specific offerings and soft skills such as creative solutions to education are important markets for Wales.

It is important to develop tastemakers in Wales as well as bringing in international delegations. Showcase Scotland is a good model as both the selection of the artists and the delegates have strict results-based criteria; the artists need to be export-ready with strong back-up and the delegates need to be able to book acts and tours (and if they do not do this, they are not welcome in following years).

People want to go to where there are good conversations and the work is the hook. It is really important to have an industry event in a wider festival and have a half day of wider cultural or heritage outings.

Timing and time frames are important. It was advised that two-three days maximum is programmed for showcasing. It is also important to ensure that the wider event is timed either to follow on from other major events so that bookers can go sequentially or at a time that is more available in the calendar.

CASE STUDY

SCOTLAND: INVITING THE INDUSTRY TO A SHOWCASE

Showcase Scotland

Showcase Scotland aims to secure performances for Scottish-based artists on a global scale, create new audiences for existing artists and introduce new artists to existing audiences. The showcase is housed within Celtic Connections, which is a public and international festival.

- Scottish artists are showcased over five days during the period. Showcase Scotland offers a Spotlight on international partners each year; in 2018 this was Ireland. There are around 45 events in 20 venues.
- Targeted and results-focused. There are no more than 200 delegate spaces to keep the focus. Delegates need to have clear objectives for attending in their applications; if they do not book to see at least two bands they won't be invited back. All delegates are expected to pay a £150 registration fee, plus travel and accommodation costs to attend. Only around 16 delegates working with the British Council Scotland may have their participation subsidised.

celticconnections.com/Pages/ShowcaseScotland.aspx

3. What are the barriers to effective showcasing of the arts from Wales?

The barriers to effective showcasing reinforce the theme of lack of resources. Time, capacity and funding are the issues. In terms of funding, long term, flexible funding was cited as a better model and examples of the Canadian Council were given as good practice. There is a need for a ten-year plan.

In addition, evaluation to date is crude and is not measuring the real returns on investment.

'Criteria for funding forces you into narrow measures where we actually need a broad set of impacts'.

The proliferation of agencies and lack of integration is hampering progress, it was said. For example, in the music sector,

'The expertise lies within the sector – the teams in Sŵn, Trac and FOCUS Wales have all the skills and knowledge, but each go to different people for funding and don't function together'.

It was suggested that it would be better to combine the money to create a core fund for the sector to enable them to work together, to run their events and to allocate £500k for capacity building.

'We are too small to have so many silos – we need at least four people to go to the Great Escape in Brighton'.

A Welsh music export office/Welsh Music Foundation would be a good solution.

4. How would you like to see the public sector supporting international showcasing of the arts from Wales?

The groups felt that the absence of co-ordination of the public bodies and lack of a national vision and strategy contributes to the underperformance of Wales' arts/ cultural sector as a whole.

There was a call for working across the Welsh public agencies: international affairs and Europe, external relations, culture, creative industries, tourism, overseas trade etc.

'Working with Wales' trade missions is mutually advantageous. When we were in China, the business response was that we enhanced the distinctiveness of the trade mission'.

There was a call for

'Big and bold initiatives with good governance and funding...this cannot be done with small money and agglomeration of existing budgets'.

'It will need a major investment to develop but would bring back major rewards. Small interventions can be lost'.

A long-term strategic approach with a ten to twenty year ambition is needed.

5. What would you like to see Wales doing in order to profile its arts and culture better internationally?

The potential for a major investment in and creation of an international festival or programme was strongly supported across each of the focus groups. In Swansea, there was support for a large-scale cross-sectoral event, while in Aberystwyth there was a greater leaning towards favouring niche and small interventions of high quality. In North Wales it was felt that work had difficulty penetrating the 'slate curtain' to be seen in the South of Wales, and this is a problem.

In each region there was strong support for specific grants for artists to enable internationalisation of their work, access to international trade fairs and markets and bringing international delegations to Wales.

It was also agreed that building on the existing successes and acknowledging them is important. For example, the Machynlleth Comedy Festival and Craft of Comedy are attracting large numbers of the public and the industry and are still relatively unsung across Wales.

FINANCING AND RETURN ON INVESTMENT

Despite decades of economic impact studies and evaluations, the evidence of the added value and economic impact of different international arts and cultural programmes is often not robust enough to allow prioritisation of funding choices and other types of support.

The current drivers for investment in the sector are increasingly those that highlight the impact on counteracting inequalities in society and it is well-established that large-scale events have far-reaching social impacts. Together with the economic impacts, these are the vectors that ultimately determine the return on investment.

Typically the two elements – impact studies and perceived value – are then augmented by the use of narrative and case studies to draw out the longer-term social outcomes of arts programmes i.e. those outcomes that are often more difficult to capture.

The trouble is that each element in the assessment is only as good as the research methodology and practice that underpins it. There have been significant criticisms of each component involved in the evidence gathering process. As an example, recent studies on the return on investment for British Dance Edition showcasing showed that there was little evidence of direct economic advantage in terms of take-up of shows for touring. This suggests that either there was a mismatch between the work and the promoters, or that results require a longer timeframe than the evaluation allowed. It also suggests that perhaps the event needs to consider other outcomes, such as capacity building and training, alongside the purpose of selling shows, which can be influenced by global changes, shifts in emphasis or taste or other external factors.

The annex provides an analysis of the methodologies used in 14 recent reports and makes recommendations on how evidence can be brought together to provide better arguments for investment in international showcasing.



Khamira at Hay Festival India Wales Mela 2017. Image credit: Rosa Bickerton

CONCLUSIONS AND RECOMMENDATIONS

The recommendations that follow are based on our research, and respond to the consistent messages we heard; that we need to bring international promoters to Wales and make the most of their attendance; that Wales needs a more effective, sustained and strategic presence at the right international events; that artists and cultural organisations in Wales need stronger skills to showcase their work and the nation effectively; and that the sector as a whole needs a more integrated, strategic and multi-agency approach to international showcasing.

GENERAL PRINCIPLES

For showcasing to make a significant impact, there must be new investment and a more strategic and joined-up approach by all of the agencies and stakeholders working in the field of connecting, promoting and showcasing Wales and Welsh talent.

This will require large shifts in the current way of working. Small adjustments to the current system will not yield the necessary major changes.

The wide range of views and approaches reflected in this report mirror the diversity of the arts and cultural sector within Wales. Despite this diversity, strong and consistent messages emerged through our research.

The majority of people that we interviewed suggested building on current successes as the best way of showcasing Welsh work rather than creating a new vehicle.

Rather than developing new political or public sector initiatives to showcase Wales, our interviewees emphasised the need to develop trusted and respected vehicles through which Wales arts and artists could be shown.

Our research also identified the need for a consistent, well-informed Welsh presence at key international showcases. The current system appears 'ad hoc' and inconsistent.

There is a proliferation of agencies working across the international arts and cultural sphere in Wales and that there needs to be a more coherent, long-term approach. All of these agencies must work closely together and develop a strong partnership model that allows for the sharing of knowledge, planning and priorities, with the clear overall objective to serve and help the sector in Wales.

Our recommendations reflect the need for a more integrated, strategic approach with interventions in all areas: policy, funding, practice and delivery. This has the best chance of delivering meaningful impact for the arts and cultural organisations and for Wales more generally.

Our recommendations fall into four key areas;

1. Bring the sector to Wales
2. Wales' presence in the international fora
3. Strengthen the sector's showcasing skills
4. An integrated and multi-agency approach

1. Bring the sector to Wales

This could include:

a. *Building a showcasing element into existing events*

- Incorporate a showcasing element, lasting no more than two or three days, into a larger existing festival that already has a good reputation and profile internationally. This would attract international promoters and presenters to Wales for an event that would give a platform for Welsh work within a proven programme of high-quality work from around the world.
- Create an international delegates' programme that is well managed and closely monitored along the lines of the good practice outlined in the report.
- The principles of this would need to be;
 - Exciting and innovative (niche) work. In terms of a festival in Wales this would need to include international work and not just work from Wales.
 - Play to Wales' strengths, such as site-sensitive work, community engagement, arts in health, and creative learning.
 - Create opportunities to network with peers.
 - Engage local connection and relevance: the stories, places and people of Wales.
 - Create a programme of engagement and participation for delegates, which takes in the wider city.
 - Include city-wide or take-over of venues and work in non-traditional spaces.
 - Create connection to the wider arts sector, ensuring the benefits are shared.

b. *Development of a new signature event/showcasing platform*

- Alternatively, or additionally, create an annual or biennial major celebratory event that builds on an existing festival. This would be a 'signature' event and would need to sustain international interest over a ten-year time frame.
- Funding would go towards specific elements, with the aim of making the event 'greater than the sum of its parts' such as a city centre takeover during the festival, enhancing the international programme, creation of an international delegation, a step change in the marketing, and so on.
- This programme/festival would need to run for a minimum of ten years to ensure at least five events, which although they can have different themes, would need to develop a common overarching identity reflecting the culture, values and voices of Wales: site-sensitive, inclusive, large-scale and celebratory.

c. *Hosting of roving international industry events*

- Host one of the major international sector events, during which a Wales showcase could be included. There would be three to five such events over the ten-year period. This would build the picture of Wales as a good host for international presentation and debate.

2. Wales' presence in the international fora

a. *Sustained and educated presence at international events*

- Create and sustain a strategic Welsh presence, of artists and/or professionals, at the major international showcasing and networking events in the UK and internationally.
- Ensure that the chosen representatives have the skills and sector knowledge to make the most of their attendance on behalf of the wider sector as well as individually.
- Put systems in place to share knowledge gained with the wider sector.

b. *Long-term relationship building*

- Create an international network of agencies/agents to promote and support the major initiatives from Wales. Sector-specific agencies such as the Music Export Agencies or Showcase Scotland provide good models. Keep this network updated on Welsh arts on a regular basis.
- Ensure strong links with the UK Culture Diary.
- Develop the network of artist residencies and promote a greater awareness of residency opportunities in Wales through greater links with ResArtis or through a Wales specific register.

3. Strengthen the sector's showcasing skills

a. *Sector skills development*

- Draw on the research that informs this report in order to better support the sector, so that work from Wales is not only excellent but export-ready. This would include soft skills development, the development of marketing/digital portfolios and local/national touring support.
- Support artists to develop the skills and experience they need to showcase their work internationally, including performing, exhibiting and touring at local venues, and becoming part of local, national and international networks to learn, share knowledge and develop the critical vocabulary to position their work internationally.
- Ensure marketing has a higher priority in funding agreements.

b. *Build skills of intermediaries (such as producers, curators and agents)*

- Set up a structured mentoring scheme for knowledge transfer between peers.
- Create a more targeted scheme for travel to showcases and networking events with a requirement to feed back to the sector via online or offline sharing events.
- Create a system of work shadowing and internships alongside the experienced international producers who come to Wales (and who work outside of Wales).
- Develop a network scheme of international scouts and tour bookers.

c. *Support local work*

- Support local work effectively, including the local touring infrastructure, and encourage diversity of voices, approaches and ideas.
- Understand the potential of diaspora groups to lead and enhance international activity. All new developments should include local, diverse voices as part of the initiative from the start.

d. *Up-skill representatives*

- Develop training packages for the Welsh public sector (Welsh Government overseas offices, Trade and Industry, Tourism et cetera) to keep them updated about the opportunities in Wales (such as residencies, festivals and venues), the timing of major events and the key export-ready Welsh artists and cultural organisations. This would include expert services such as the arts and health, arts and older people, and creative learning in schools.

4. An integrated and multi-agency approach

The sector needs to work together to;

a. Build a strategic international presence

- Identify the key international platforms at which there should be a sustained Welsh presence
- Identify the best attendee from a strategic point of view
- Ensure that the attenders have the skills and contacts to make the best use of their time at events

b. Facilitate the sharing of skills and information within the sector

- Provide a platform for the sharing of intelligence, knowledge, networks and contacts within the sector

c. Co-ordinate investment

- Develop programmes of work rather than one-off projects. Develop new funding packages and long-term commitments. 'Patient finance' and loans, integrated pathway schemes rather than one-off annual competitive funding would create more sustainable international initiatives, whether this is showcase attendance or the re-staging of work to make it export-ready
- Bring together agencies to create a Major Cultural Events fund and invite bids from the sector
- Create an international showcasing fund for artists or cultural organisations to travel to showcasing events in the UK and internationally. This would have targets and conditions set for the participants. Conditions would include participation in an ongoing series of international networking events which have structured networking, keynote speakers and focused outcomes, such as exchange of contacts, connections, identification of key issues and training needs, feedback from recipients of travel grants or attenders at sector showcase events.
- Access strategically new and 'ad hoc' funding revenues, such as existing funding for non-arts specific international initiatives, non-arts-specific major events, existing arts funding bodies, existing international agencies. In addition, identify current and emerging opportunities for funding from UK government sources to replace EU funding, culture and regeneration initiatives etc.
- Seek corporate sponsorship. A major initiative is more likely to attract sponsorship, particularly from high-end new entrants to Wales such as Aston Martin and Qatar Airways.

d. Avoid duplication and create clarity for the sector

- Create a consortium whose job would be to support the building of new skills, encourage the sharing of information and experience, and which would be able to take an overview of linked project funding decisions within Arts Council of Wales and the British Council and would take cognisance of the international funding, so that there can be a clear pathway of development across agencies that is reviewed annually.
- Review the current agencies' roles and remits with recommendations to streamline the functions and avoid confusion and duplication. The key functions of the relevant agencies as identified in this report include:
 - Identifying, supporting and developing talent within Wales.
 - Developing opportunities in Wales for local, national and international showcasing.
 - Funding 'go see visits', networking, and showcasing opportunities overseas.
 - Developing the intermediary skills and capacity building of the sector.
 - Creating opportunities for showcasing overseas.
 - Provision of follow-up funding to reward successes and development of pathways.
 - Co-ordination of knowledge exchange and peer learning.
 - Strategic leadership, planning and facilitation, which needs to be long-term and consistent and should align the priorities and events of the various agencies over ten years

APPENDIX 1

METHODOLOGY

In efforts to maintain a sector-led approach in identifying options and recommendations, over the period of May to July 2018, Visiting Arts conducted:

- desk research on the significant existing reports on the topic

Over 80 texts were identified (see Appendix 2) and an analysis was done on a sample of 14 of the more relevant reports (see Appendix 6).

- an online bilingual survey across Wales

This was conducted over a three-week period in May 2018 and disseminated to Wales-based practitioners and organisations working in the arts through Arts Council of Wales mailing list, the stakeholder group and focus group participant networks, and on social media. Through 30 questions the survey asked about the benefits, barriers and extent of international showcasing and for feedback on what approach would have the greatest impact. 70 responses were received and an analysis is in Appendix 3.

- Four focus groups in Llandudno, Aberystwyth, Cardiff and Swansea

Each focus group was given worksheets with four key questions. The questions were discussed in groups and then individuals filled in the worksheets, which were collated and analysed. The results are in Appendix 4.

- 46 interviews with local and international experts

These were conducted by phone or face-to-face and typically took around one hour. The conversations contained some standard questions on views of international showcasing, perceptions of Wales and some more specific questions tailored to the experience and expertise of the interviewees.

The approach is designed with a view that recommendations should be principally (though not exclusively) industry-focused rather than public-facing and needs to provide a significant return on public investment.

A stakeholder group made up of Welsh influencers has been involved in making recommendations and suggestions throughout the process. They met four times during the process. The first to steer the strategy, the second to get an update of progress and initial findings and to make suggestions for further work, and the third to discuss the first draft of the report and findings. The steering group members were also asked to support the project by disseminating the online survey and encouraging colleagues to contribute to the report. The membership of the steering group was:

Alison Woods, Chief Executive NoFit State Circus; Andy Eagle, Chief Executive, Chapter; Betsan Moses, Chief Executive, National Eisteddfod; Ceri Jones, Director, Fieldworks; David Anderson, Chief Executive, National Museums and Galleries of Wales; Elena Schmitz, Head of Programmes, Literature Wales; Eluned Haf, Director, Wales Arts International; Graeme Farrow, Chief Executive, Wales Millennium Centre; Ifona Deeley, Head of International Relations, Welsh Government; Karen MacKinnon, Director, Artes Mundi; Kate Perridge, Independent Arts Consultant; Michael Garvey, Director, BBC National Orchestra and Chorus of Wales; Michelle Carwardine-Palmer, Executive, Director National Theatre Wales; Paul Kaynes, Chief Executive, National Dance Company Wales; Peter Owen, Head of Culture, Welsh Government; Gwilym Williams, Head of Marketing, Major Events Unit, Wales Government; Ruth Cayford, Creative Industries and Culture Officer, Cardiff Council.

APPENDIX 2

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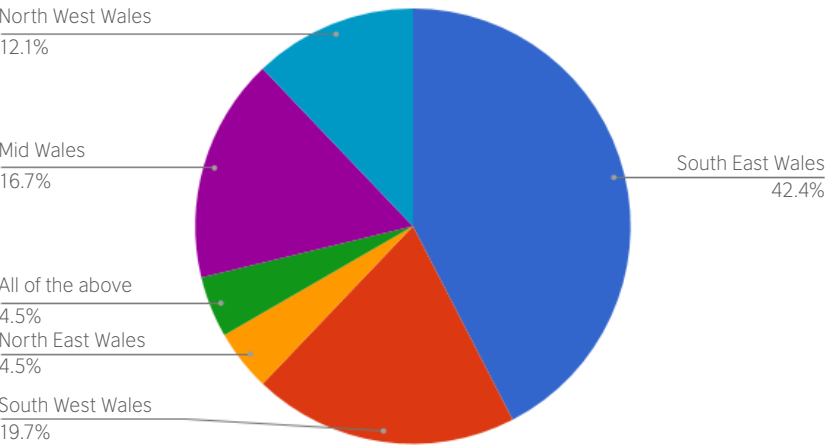
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APPENDIX 3

SURVEY AND SURVEY RESULTS

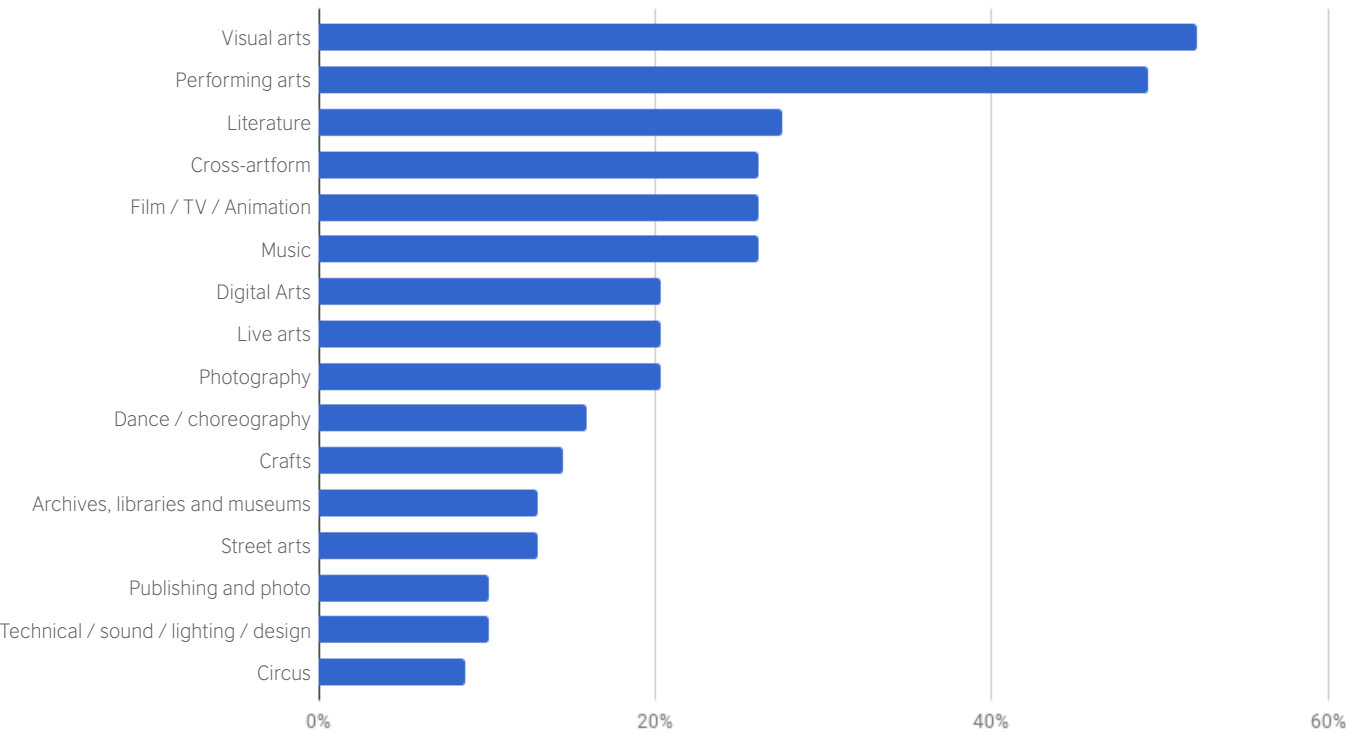
REGION YOU ARE BASED IN:

Region of respondents



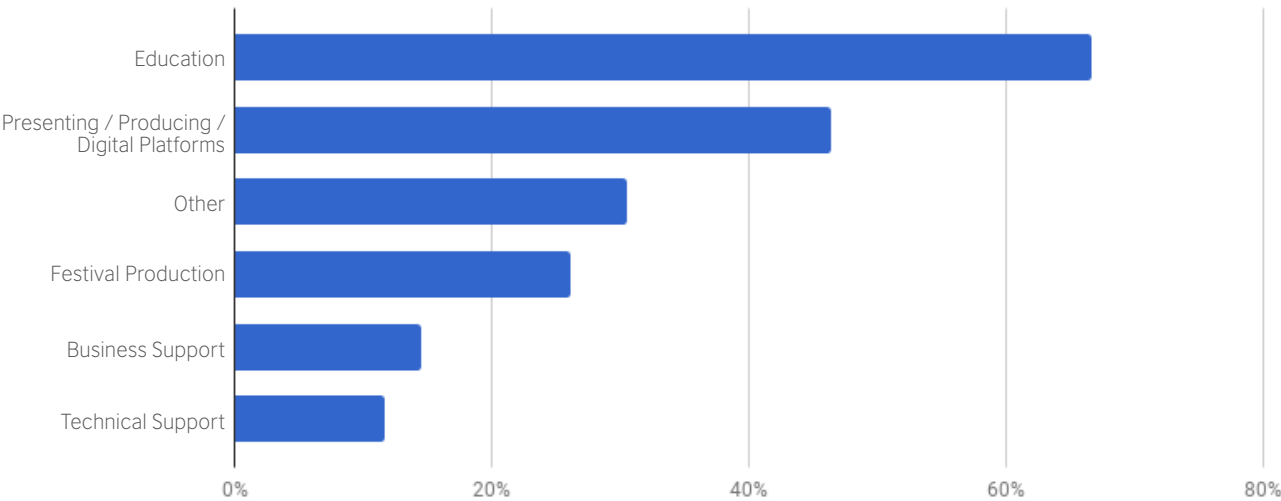
ARTFORM:

Artform



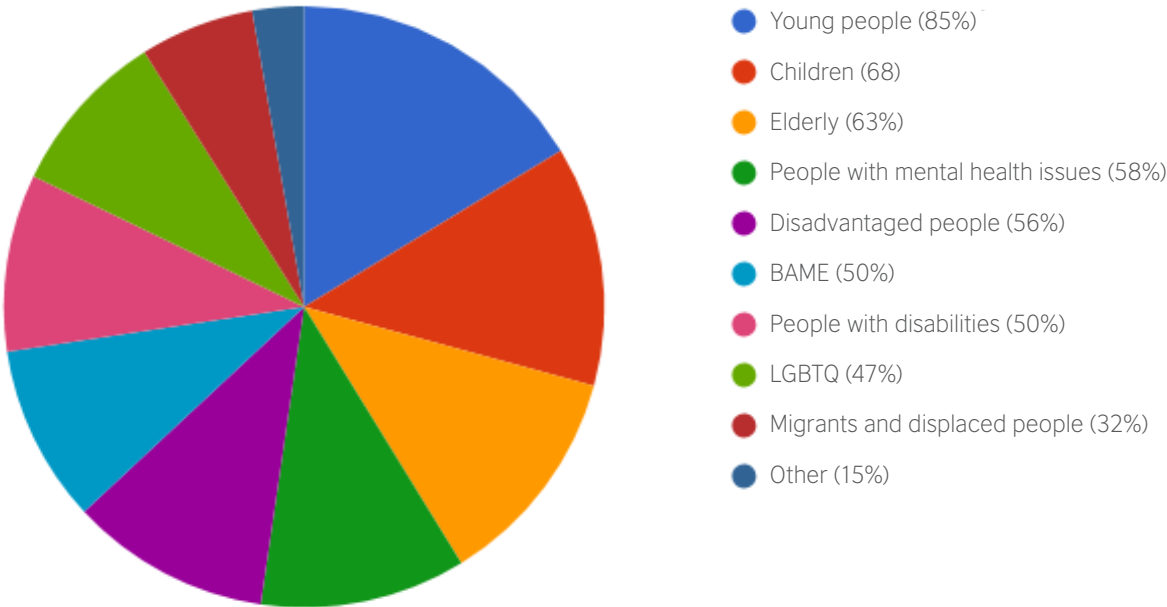
WHAT AREAS OF WORK DO YOU COVER?

Areas of work



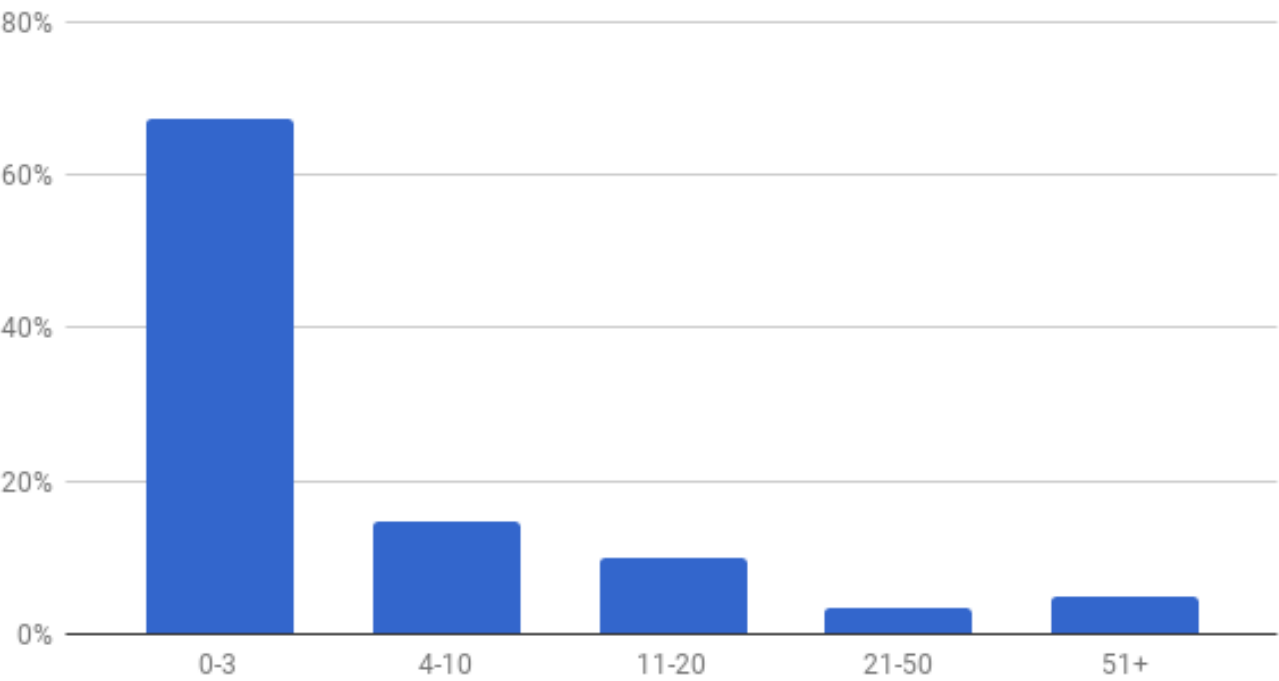
WHAT PEOPLE AND COMMUNITIES DO YOU WORK WITH?

People and communities that respondents work with



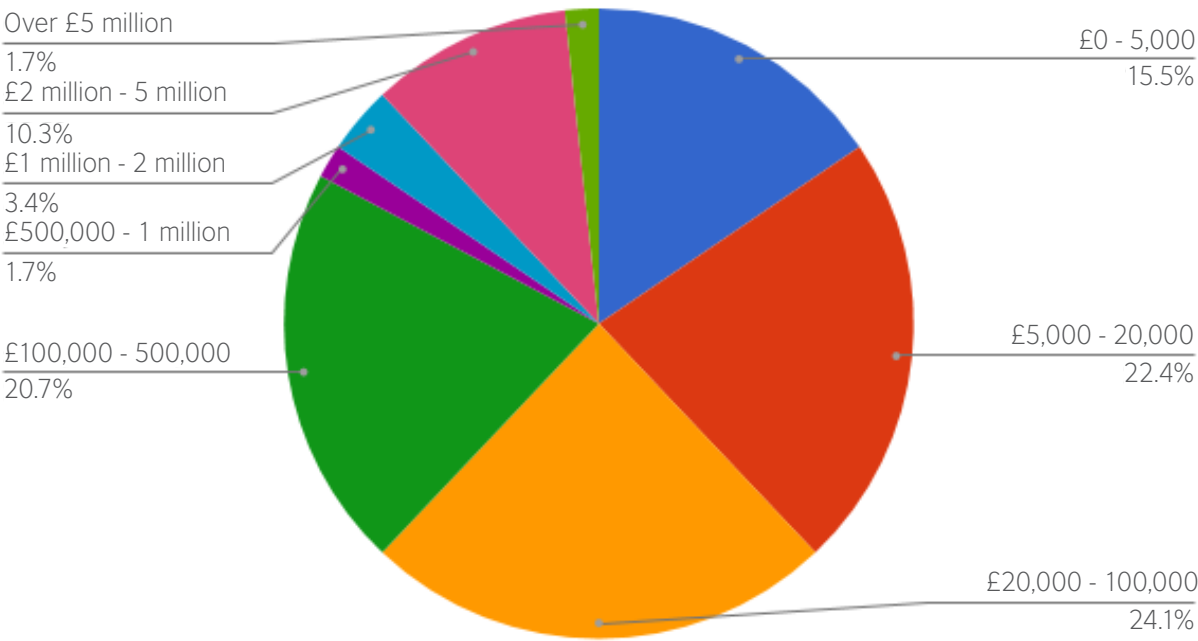
HOW MANY FULL TIME EQUIVALENT STAFF DOES YOU/ YOUR ORGANISATION EMPLOY?

Number of full time staff employed



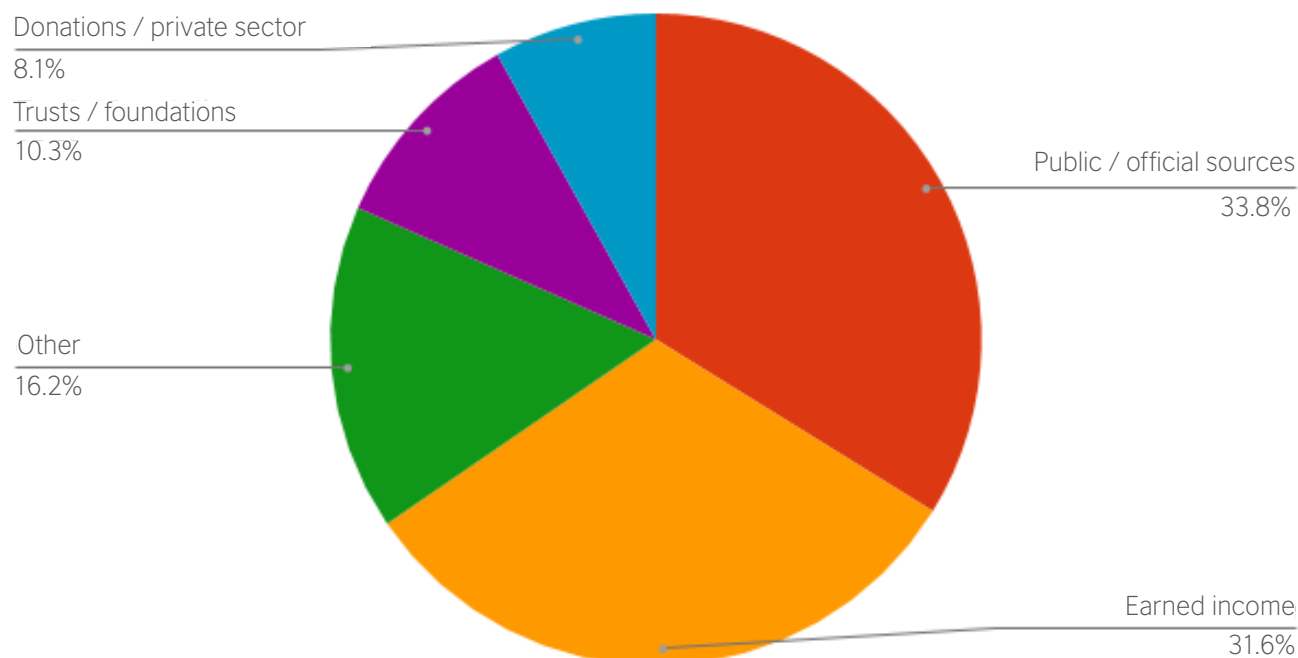
WHAT IS YOUR ANNUAL TURNOVER?

Annual turnover



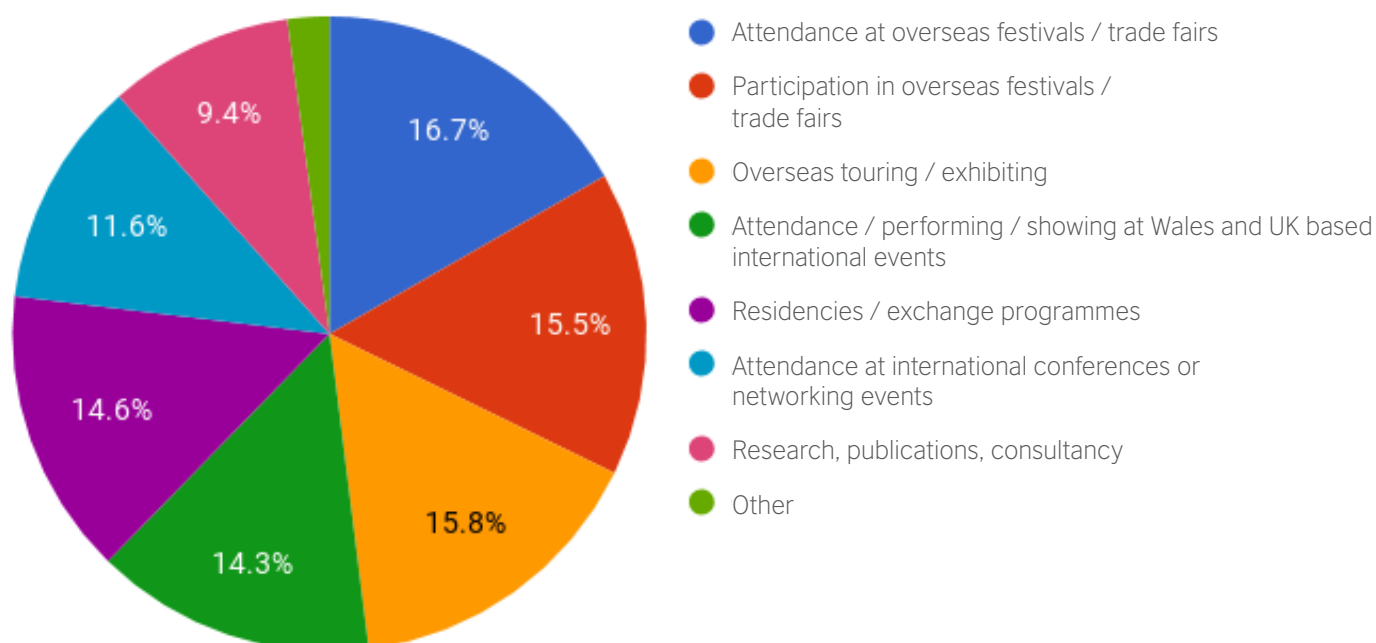
HOW IS YOUR WORK FINANCED?

How work is financed



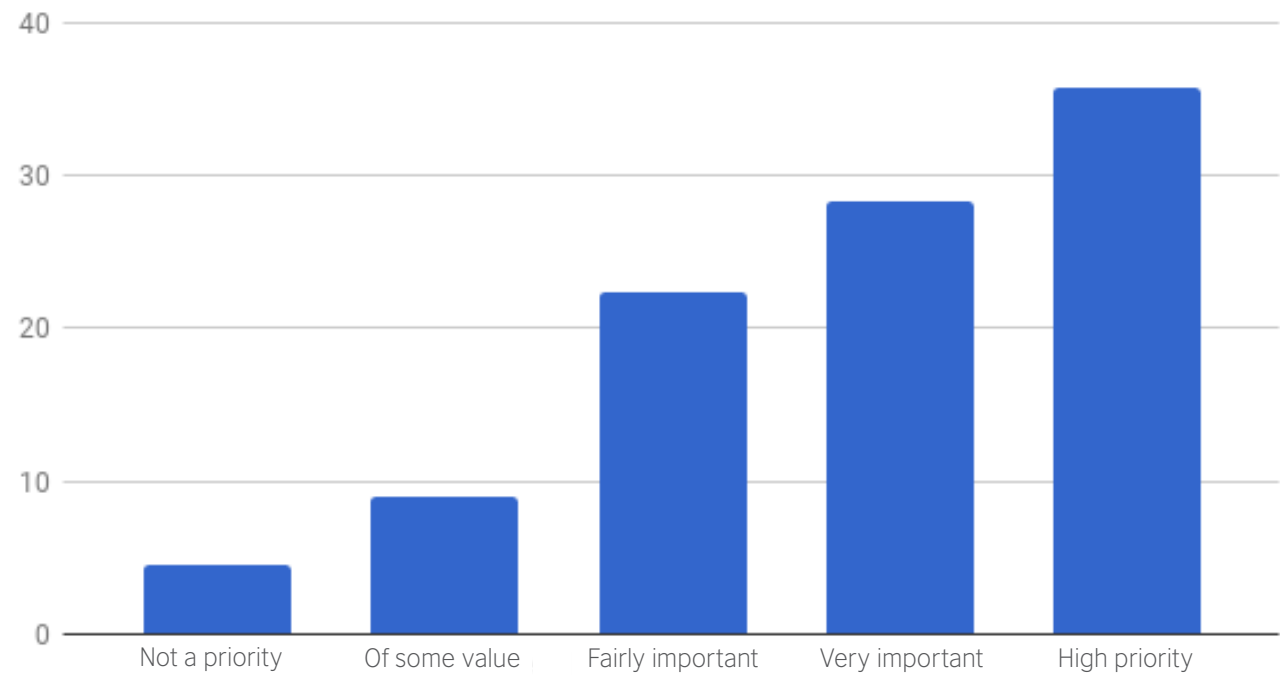
WHAT DO YOU UNDERSTAND BY “INTERNATIONAL SHOWCASING”?

What is understood by “international showcasing”



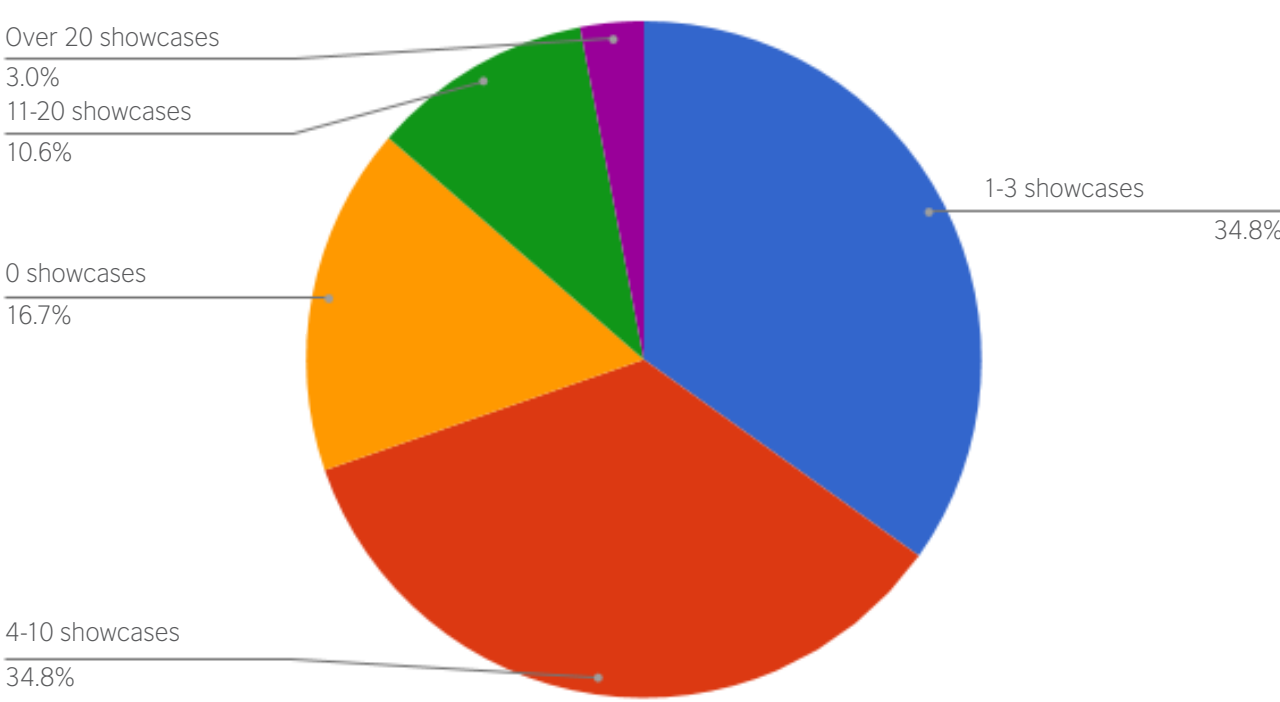
HOW IMPORTANT IS INTERNATIONAL SHOWCASING TO YOU?

How important is international showcasing



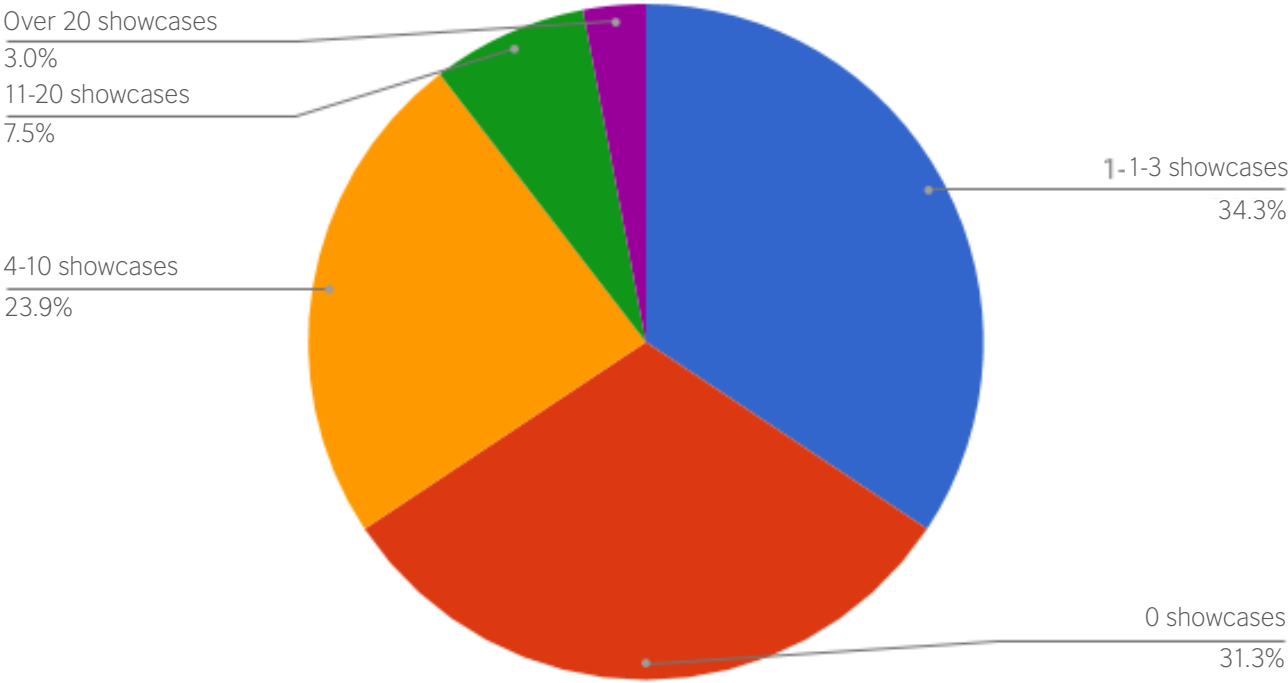
HOW MANY UK BASED INTERNATIONAL SHOWCASES HAVE YOU ATTENDED OVER THE PAST 5 YEARS?

Attendance at UK based international showcases since 2013



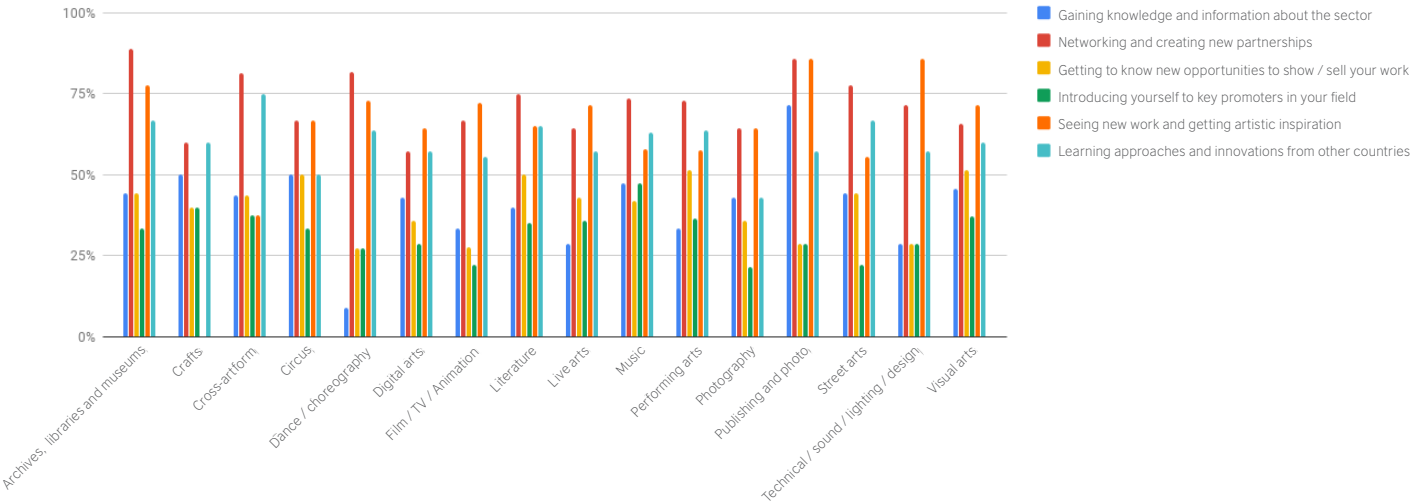
HOW MANY OVERSEAS INTERNATIONAL SHOWCASES HAVE YOU ATTENDED OVER THE PAST 5 YEARS?

Attendance at overseas international showcases since 2013



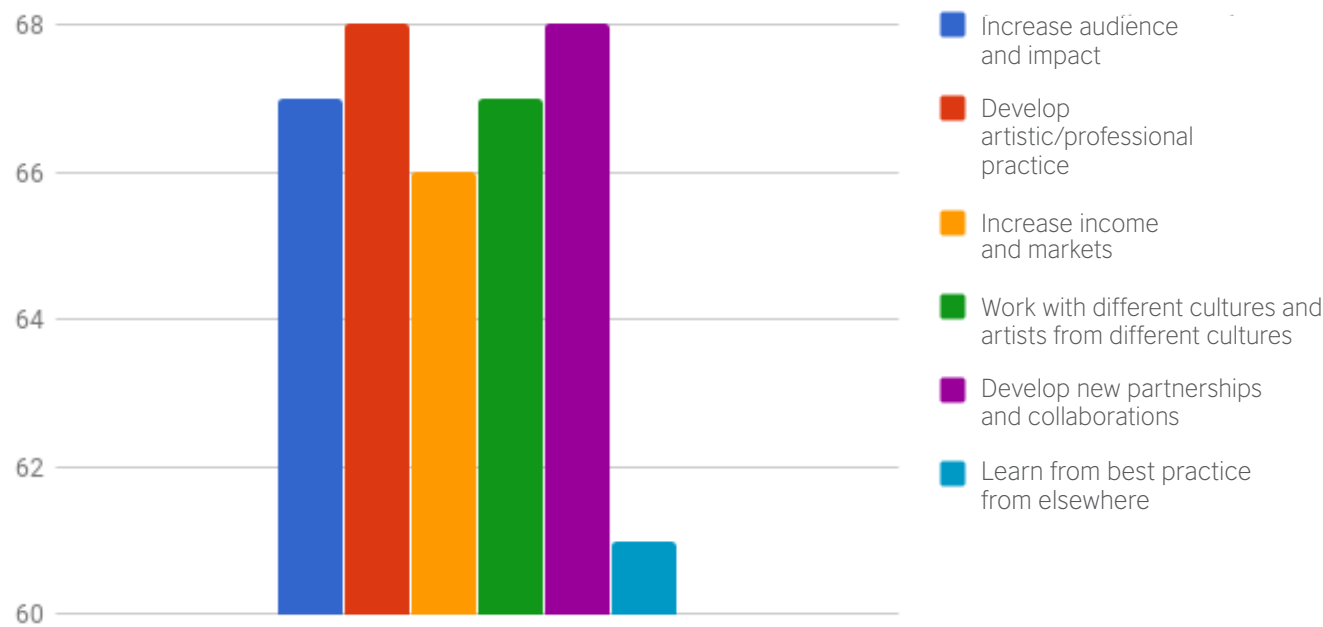
WHAT IS THE MAIN BENEFIT OF YOU ATTENDING/ PARTICIPATING?

What is the main benefit of you attending or participating in an international showcase?



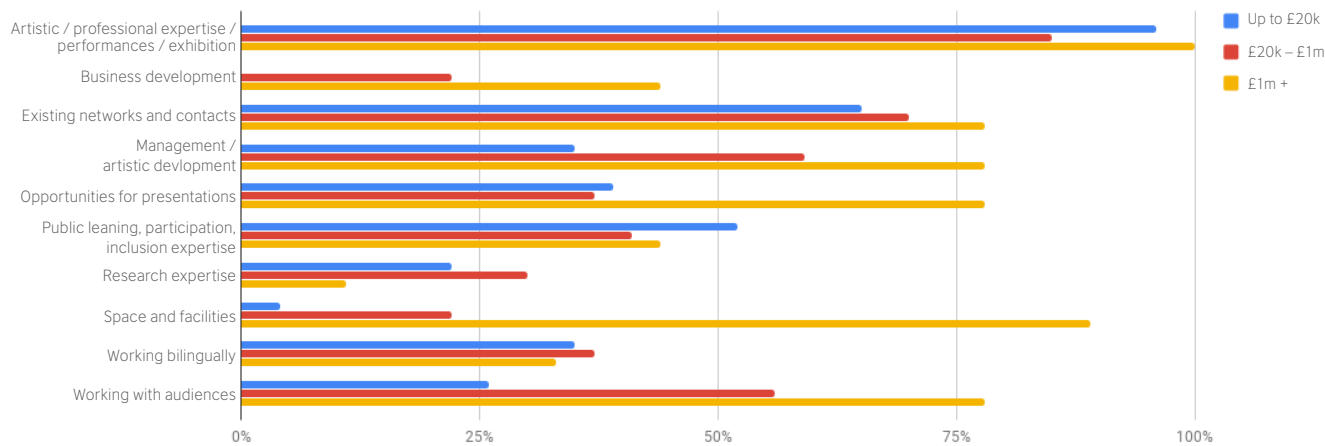
WHAT ARE YOUR AMBITIONS FOR INTERNATIONAL SHOWCASING AND INTERNATIONAL WORK?

Ambitions for international work and showcasing



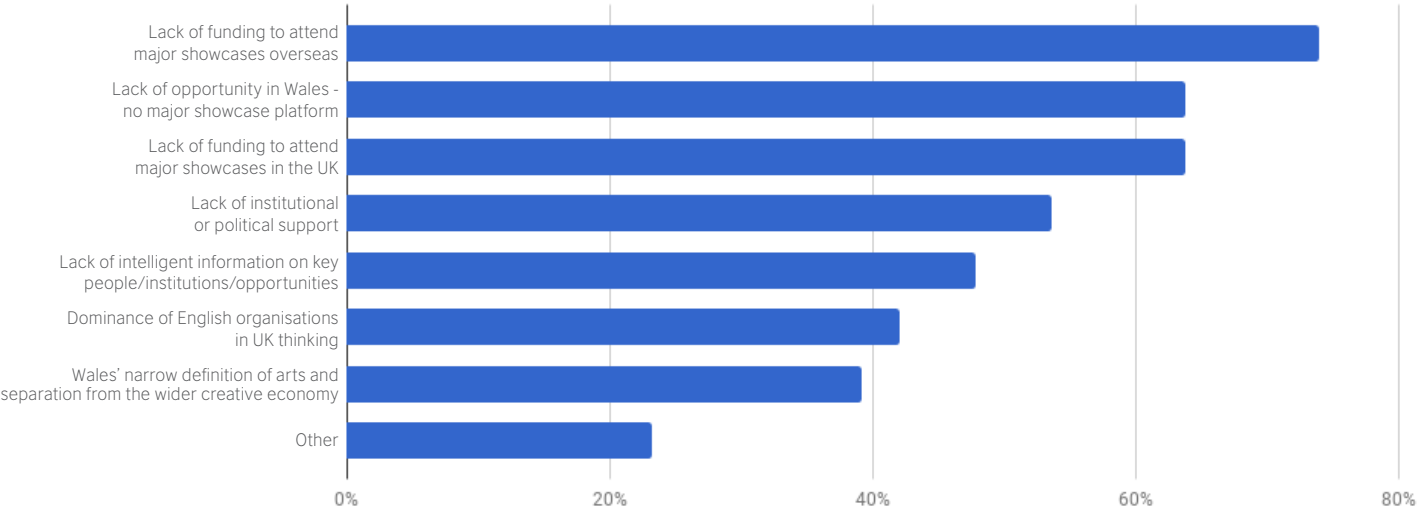
WHAT WOULD YOU BRING TO AN INTERNATIONAL SHOWCASE INITIATIVE IF IT WERE HELD IN WALES?

What would you bring to an international showcase initiative if it were held in Wales?

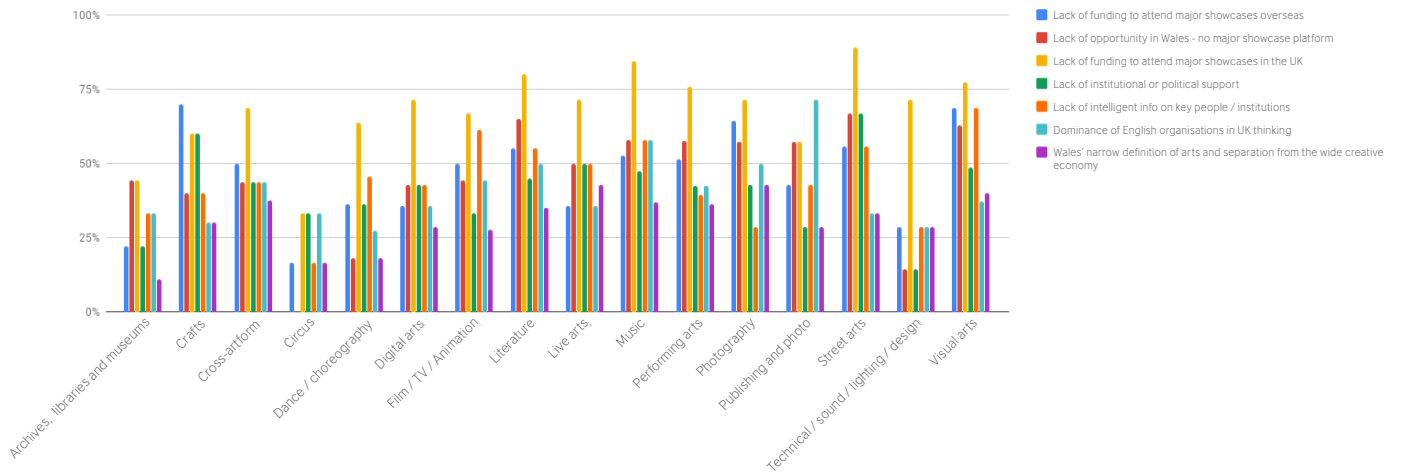


WHAT DO YOU CONSIDER THE MAIN BARRIERS TO EFFECTIVE INTERNATIONAL SHOWCASING?

Main barriers to effective international showcasing

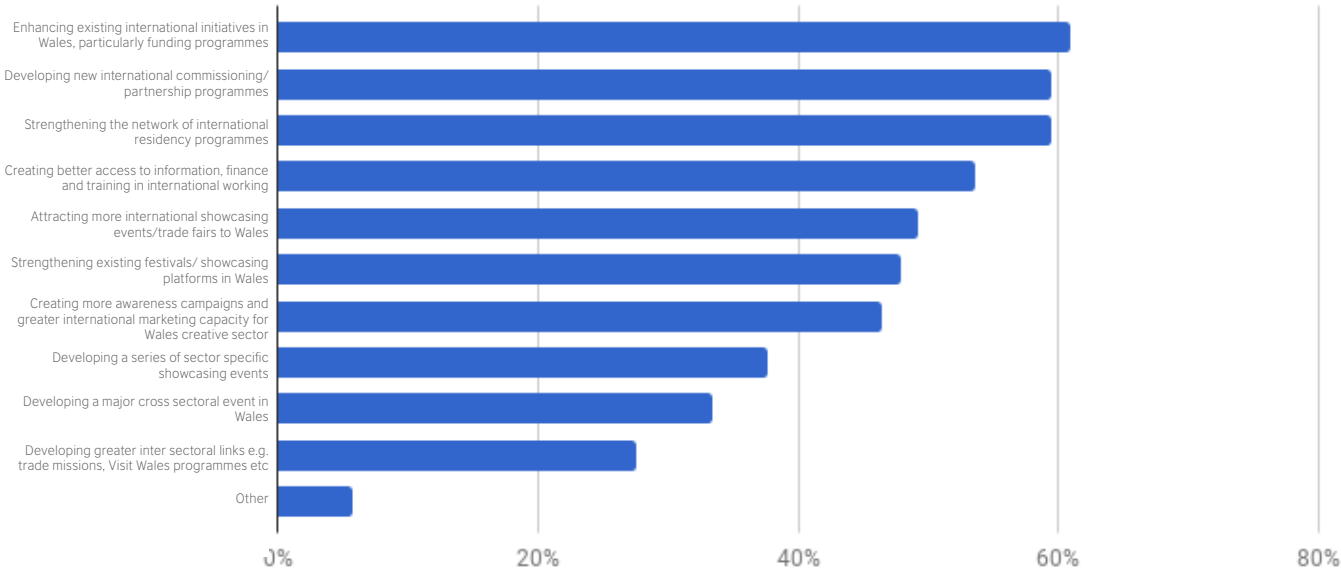


What do you consider the main barriers to effective showcasing?

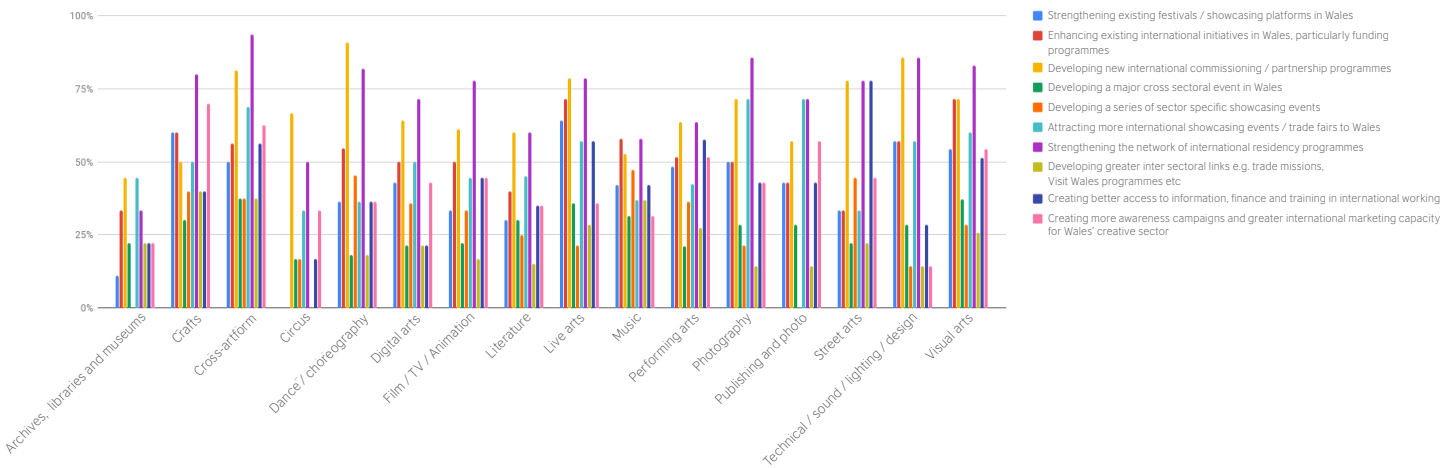


WHAT DO YOU THINK WOULD HAVE THE GREATEST IMPACT ON INTERNATIONAL SHOWCASING IN WALES?

Ideas for greatest impact on international showcasing in Wales

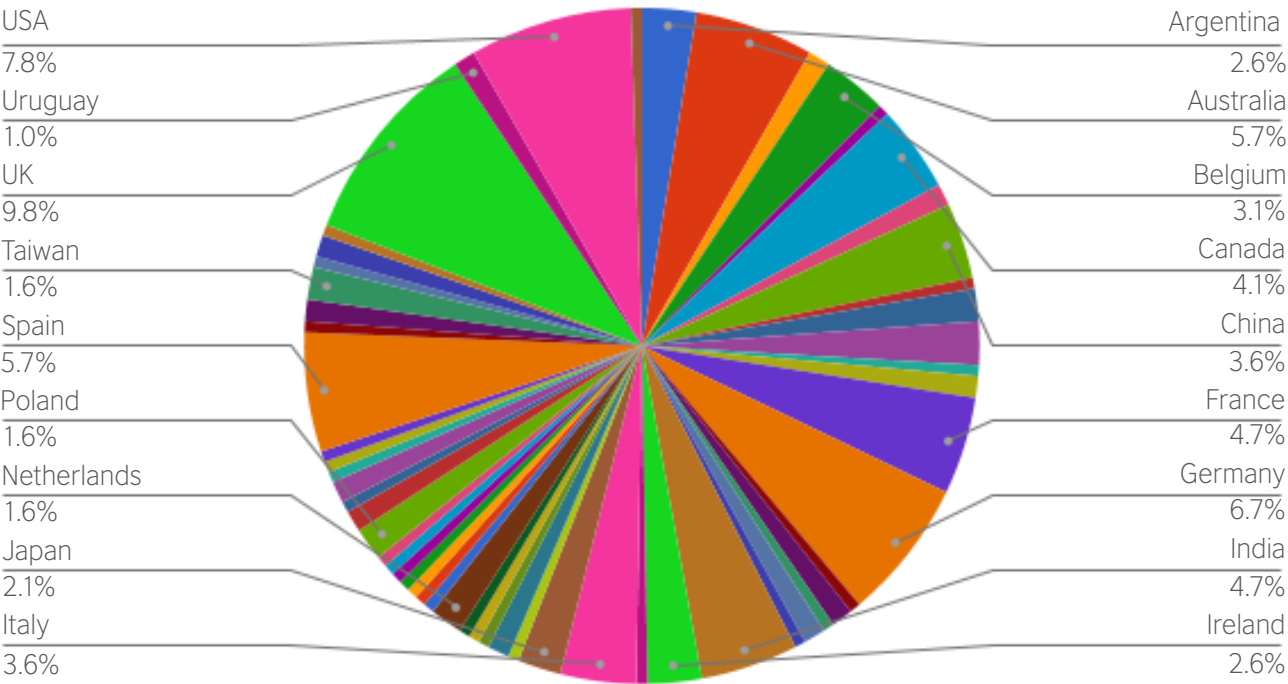


What do you think would have the greatest impact on international showcasing in Wales?



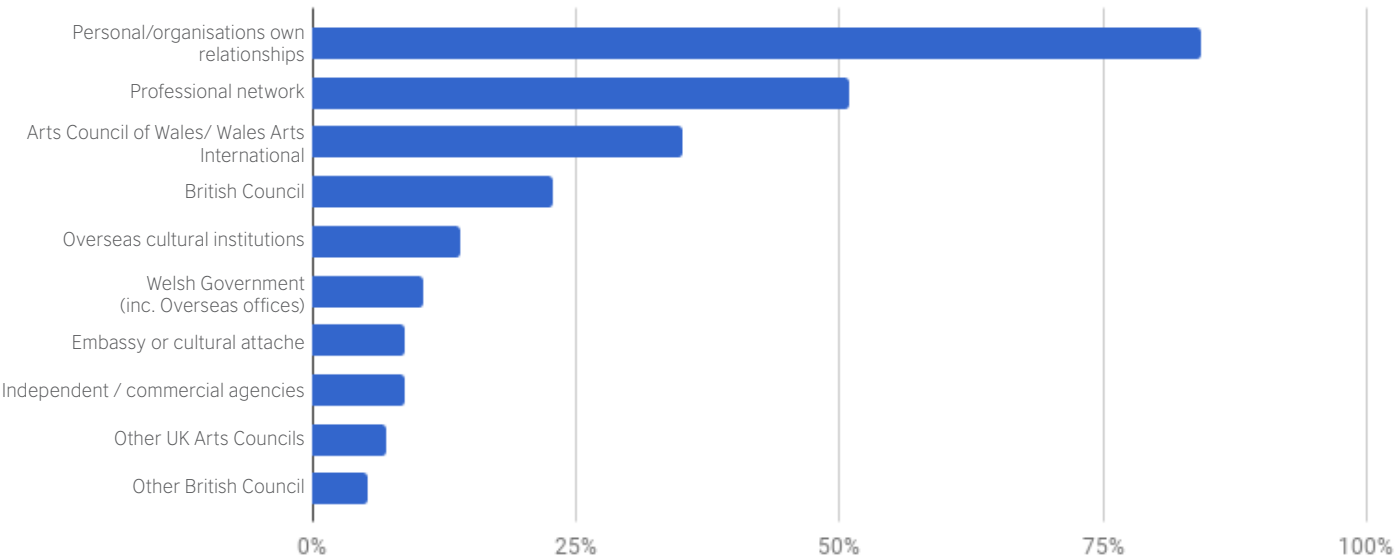
WHICH COUNTRIES HAVE YOU WORKED IN OVER THE PAST 5 YEARS?

Countries where respondents attended international showcases



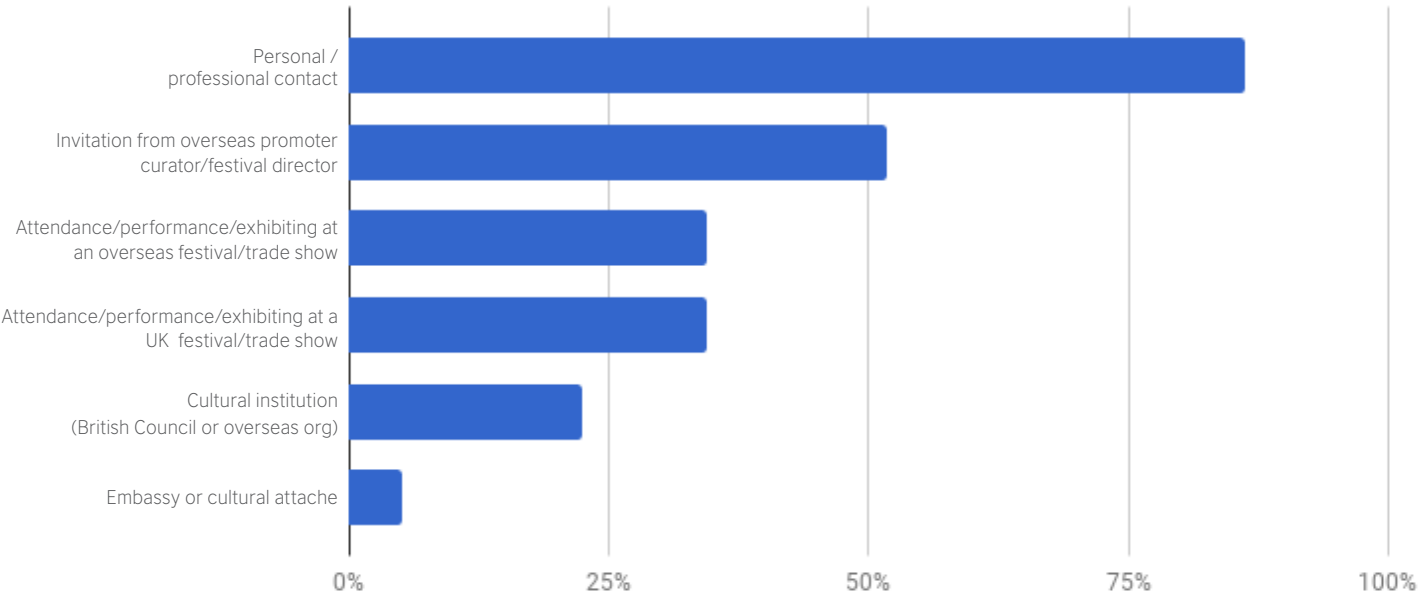
HOW WERE THE RELATIONSHIPS BROKERED?

How relationships are brokered



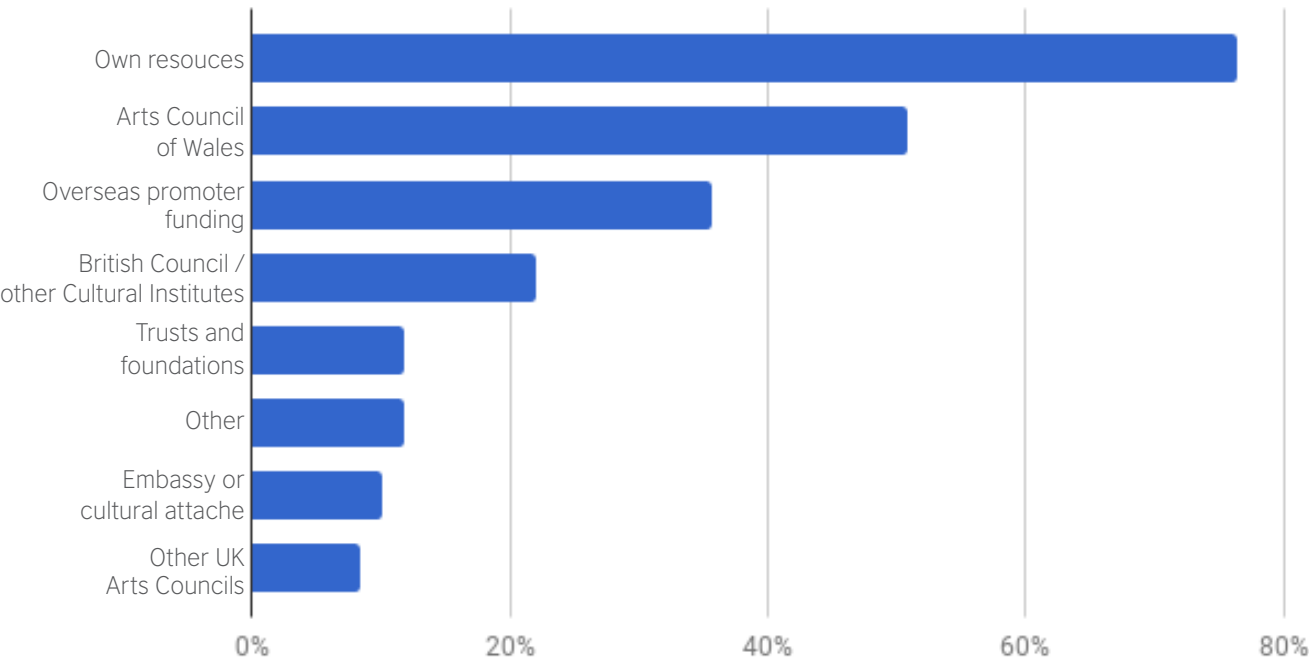
HOW WERE THESE RELATIONSHIPS INITIATED?

How relationships are initiated



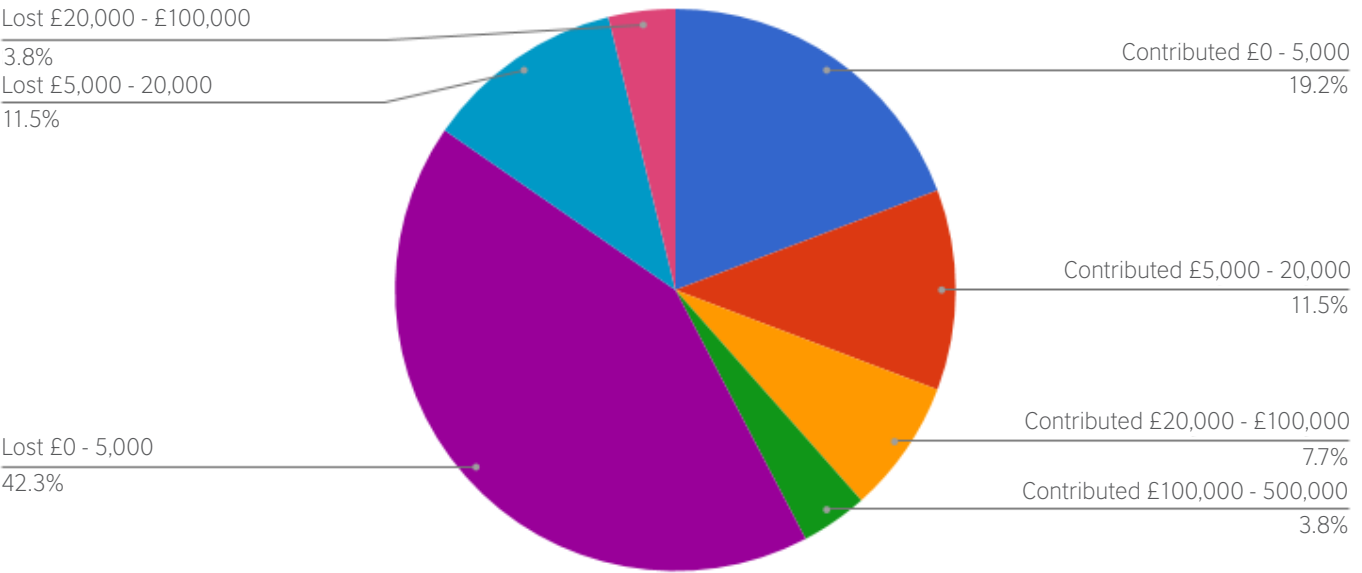
HOW WAS THE WORK FUNDED?

How work is funded



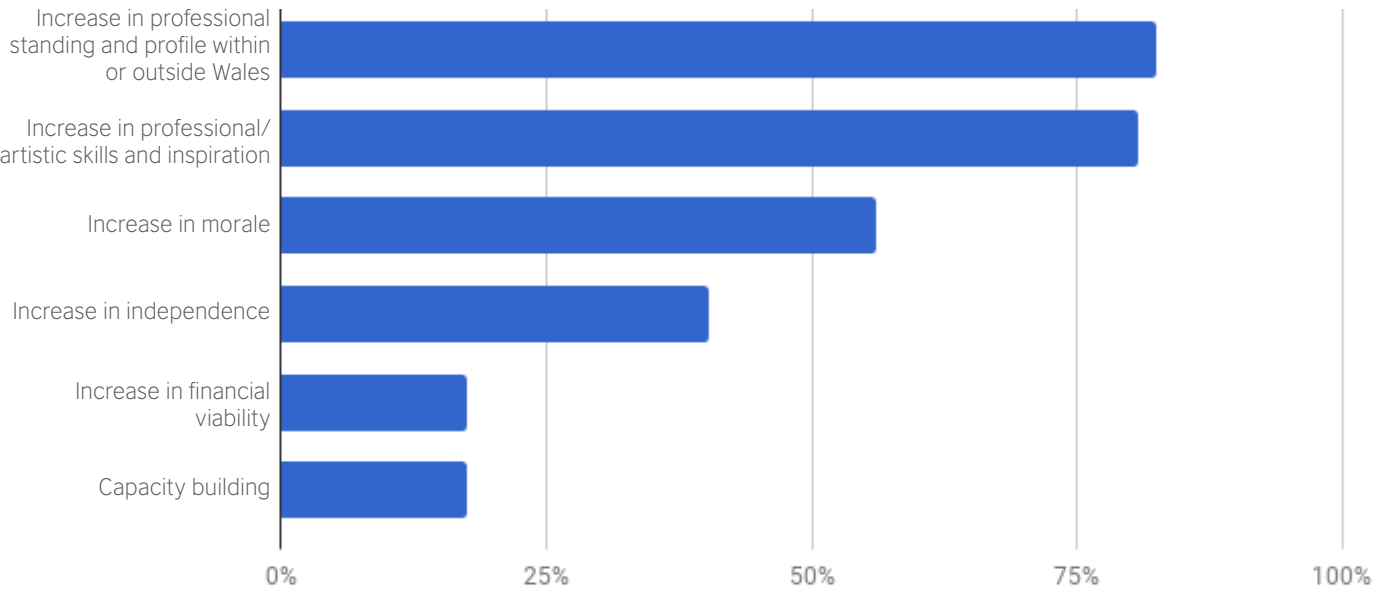
IN YOUR MOST RECENT MAJOR PROJECTS OVER THE PAST YEAR DID THE OVERSEAS WORK CONTRIBUTE TO YOUR OVERALL BUDGET OR WAS IT A NET COST TO YOU/ YOUR ORGANISATION TO DO IT? IF THIS WORK GAINED OR COST YOU/ YOUR ORGANISATION MONEY COULD YOU QUANTIFY THIS AMOUNT?

Contribution / loss from overseas work



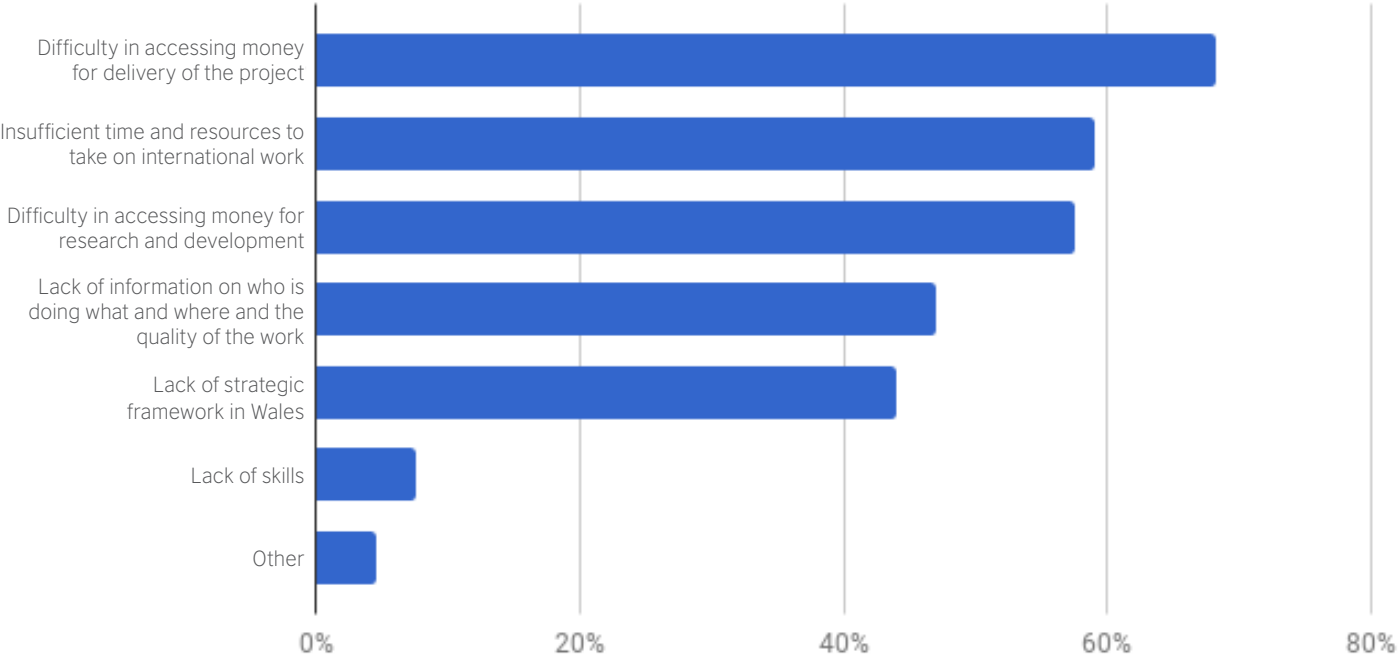
IF YOU HAVE WORKED INTERNATIONALLY, WHAT WERE THE MOST SIGNIFICANT EFFECTS ON YOU/ YOUR ORGANISATION?

Effects of international work on individuals / organisations



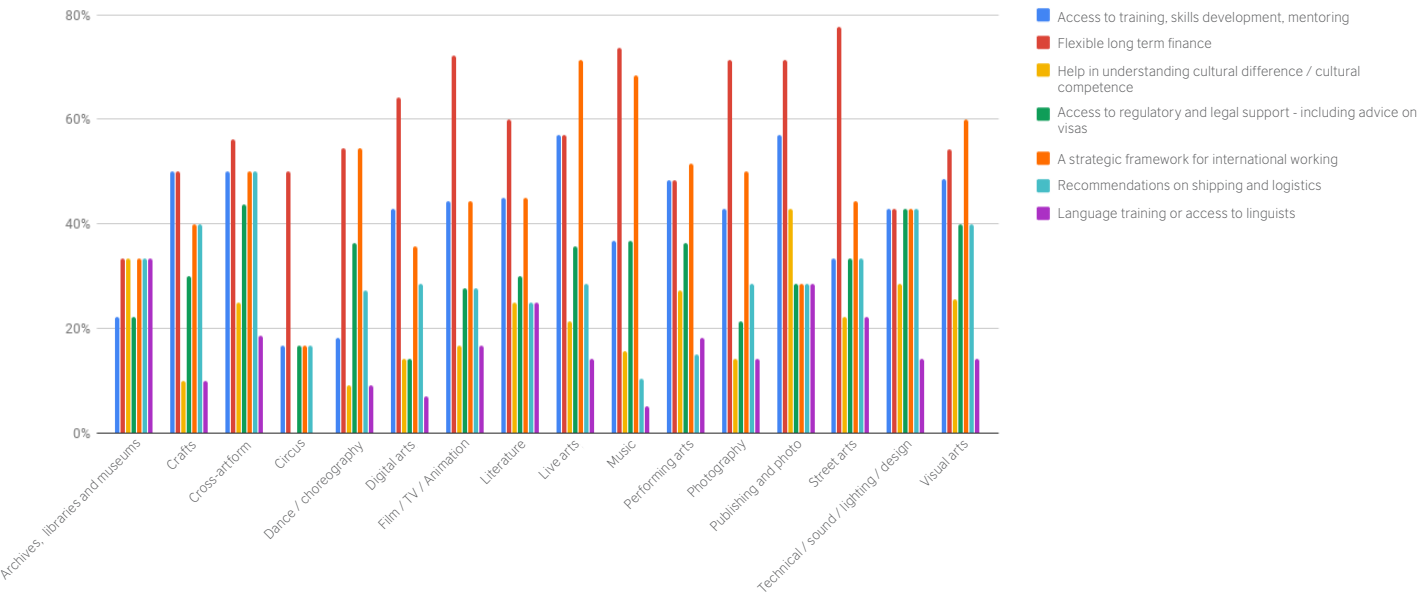
WHAT ARE THE OBSTACLES TO DEVELOPING INTERNATIONAL RELATIONSHIPS?

Obstacles to developing international relationships



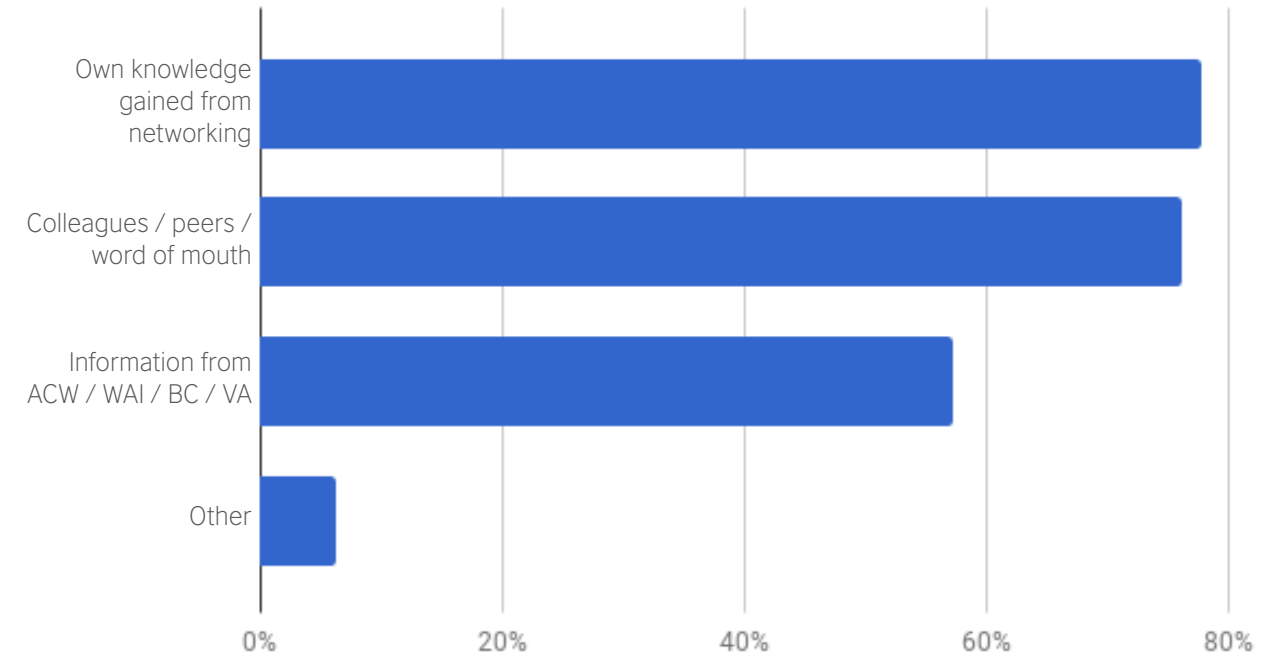
WHAT KIND OF SUPPORT WOULD HELP THESE RELATIONSHIPS AND ANY SUBSEQUENT WORK?

What kind of support would help these relationships and any subsequent work?



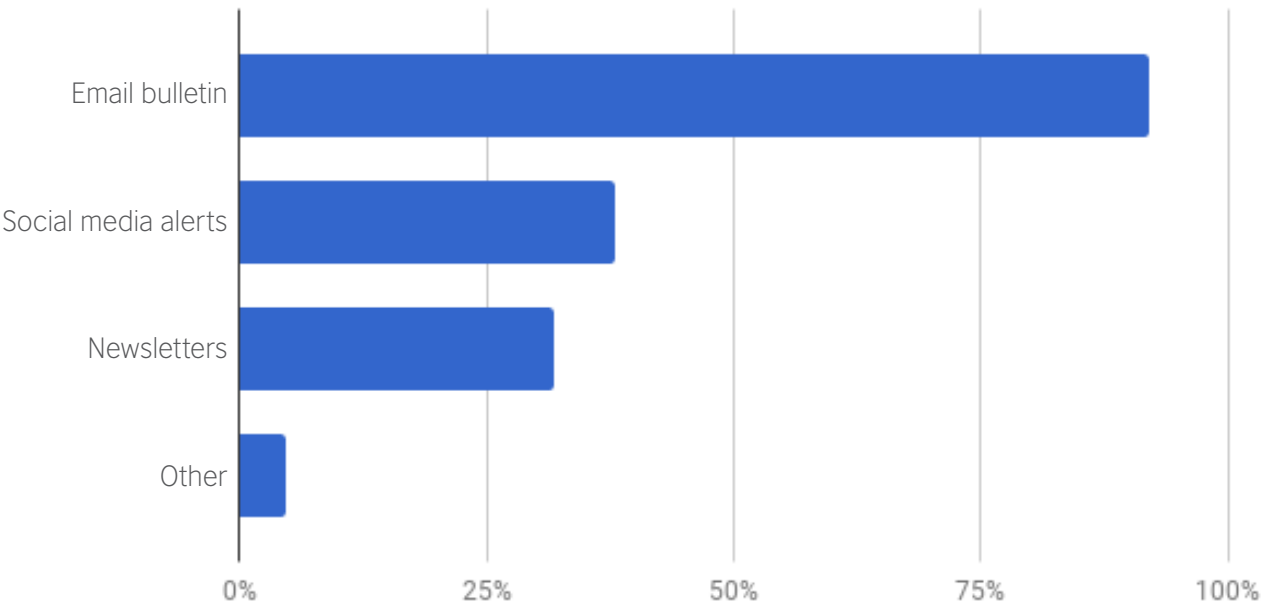
HOW DO YOU FIND INFORMATION ON INTERNATIONAL SHOWCASING?

How respondents find information on international showcasing



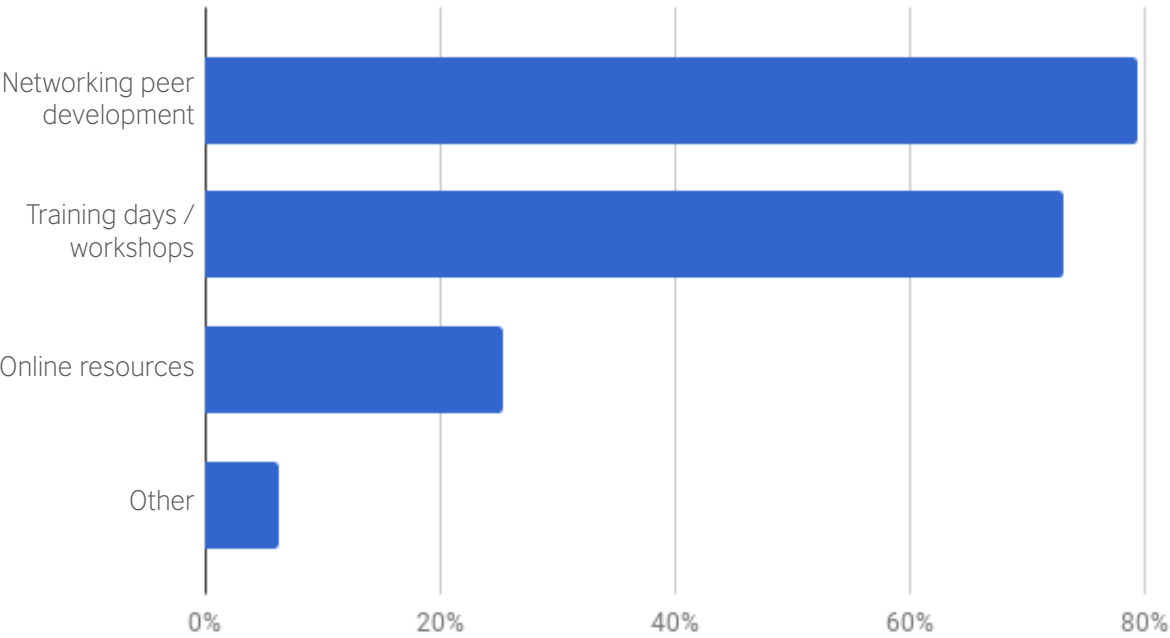
WHAT IS YOUR PREFERRED METHOD OF DELIVERY FOR INFORMATION ON INTERNATIONAL SHOWCASING?

Preferred method of delivery for information on international showcasing



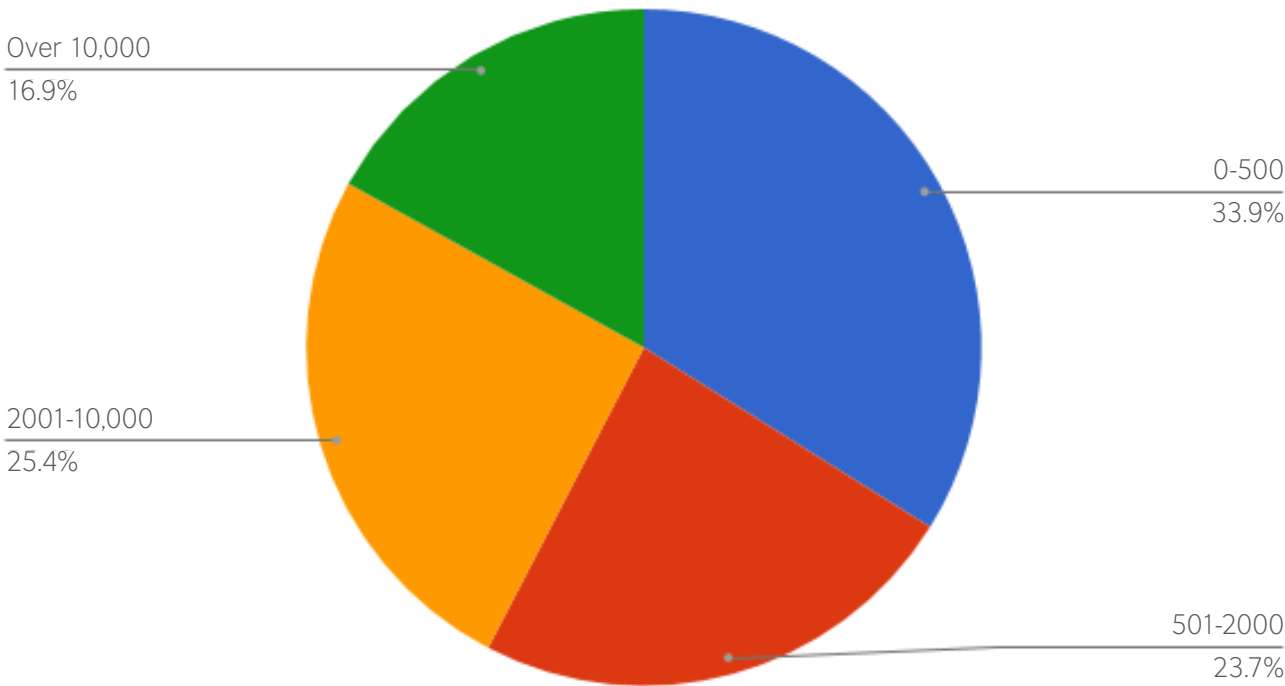
HOW BEST DO YOU DEVELOP YOUR SKILLS?

How respondents best develop skills



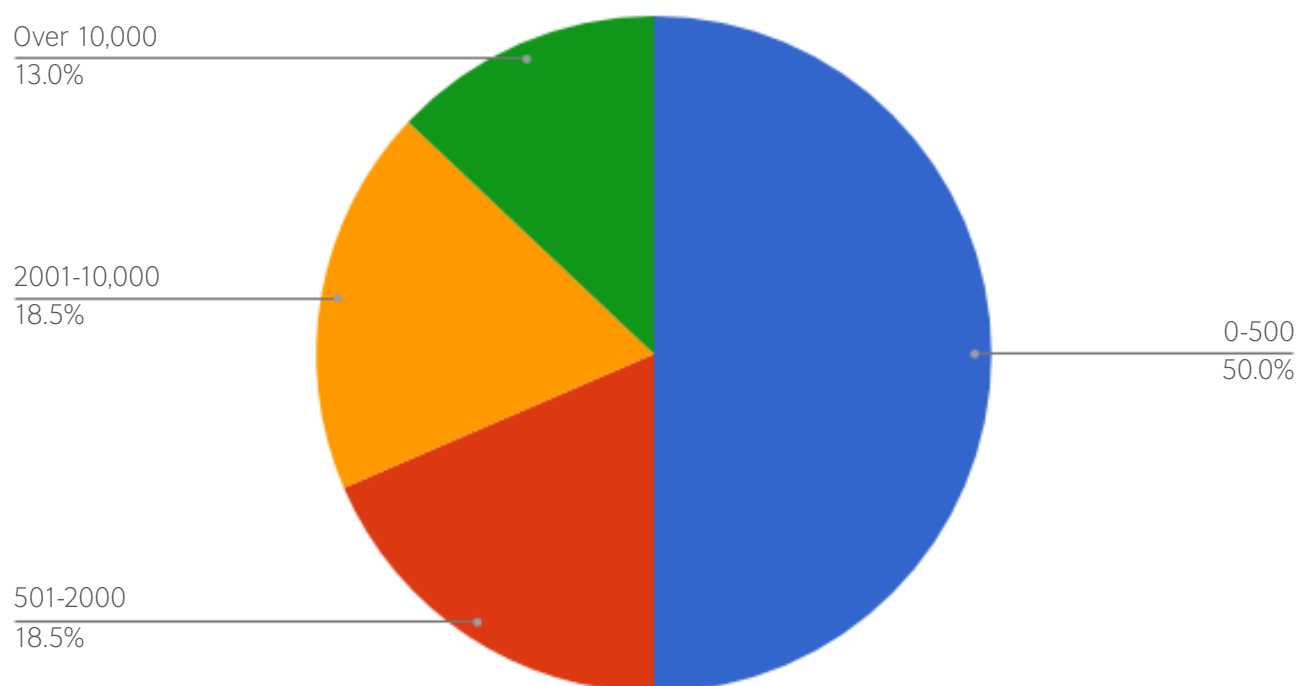
WHAT WAS THE SIZE OF YOUR AUDIENCE (ATTENDERS/PARTICIPANTS/VISITORS) IN WALES IN 2017/18

Size of respondents audience in Wales in 2017/18



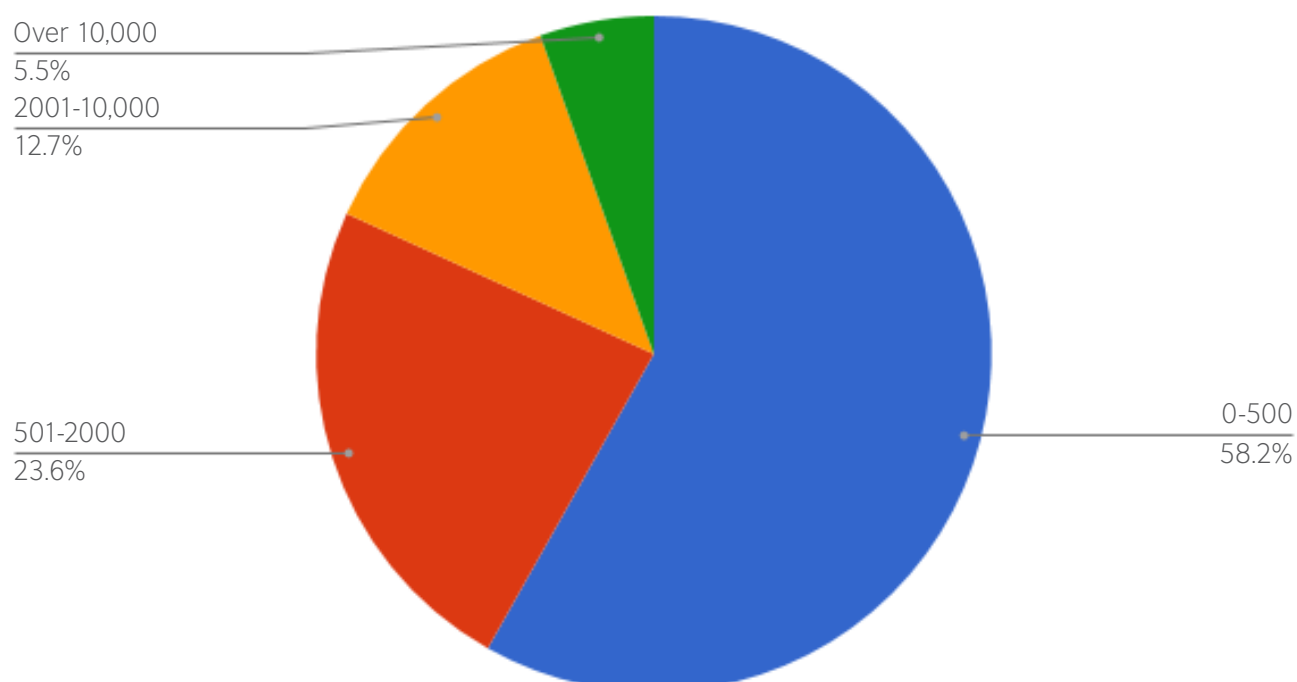
WHAT WAS THE SIZE OF YOUR AUDIENCE (ATTENDERS/PARTICIPANTS/VISITORS) IN THE UK IN 2017/18

Size of respondents audience in the UK in 2017/18



WHAT WAS THE SIZE OF YOUR AUDIENCE (ATTENDERS/PARTICIPANTS/VISITORS) INTERNATIONALLY IN 2017/18

Size of respondents international audiences in 2017/18



APPENDIX 4

FOCUS GROUP PARTICIPANTS AND ANALYSIS OF RESULTS

The focus groups were held at:

- Glynn Vivian Gallery, Swansea – Tuesday 15th May 2018
- Aberystwyth Arts Centre – Friday 18th May 2018
- Theatr Cymru, Llandudno – Monday 21st May 2018
- Oasis Centre, Splott, Cardiff – Wednesday 23rd May 2018

The participants were:

In Swansea:

Amina Abu-Shahba – Cultural Communities Coordinator
Anna Barratt – Artist
Mark Cox – Artist
Paul Davies – Artistic Director, Volcano Theatre
Nia Mills – Marketing Manager, Taliesin Arts Centre
Beate Gegenwart – Artist
Paul Hopkins – Marketing Manager, Swansea Grand Theatre
Richard Huw Morgan – Performance maker
Chris Mellor – Strategic Manager Arts, Culture and the Creative Economy, Swansea Council
Natasha Nicholls – British Council
Ben Pettitt-Wade – Artistic Director, Hijinx
John Rowley – Performance maker
Jane Simpson – Artist. Owner, Galerie Simpson
Jenni Spencer-Davies – Director, Glynn Vivian Gallery
Ray Thomas – Actor & Director
Steve Williams – Librarian, Swansea University Library
Kate Wood – Cultural Strategy and Partnership Officer, Swansea Council

In Aberystwyth:

Sandra Bendelow – Writer & Arts Producer

Alice Briggs – Curator, arts educator and artist

Kaloyan Cholakov – Artist

Paul Croft – Lecturer in Fine Art Printmaking, Aberystwyth School of Art

Rhian Davies – Artistic Director, Gwyl Gregynog Festival

Annie Grundy – Co-Director, Articulture Wales

Elin Haf Gruffydd Jones – Director, Mercator Institute

Steffan Jones-Hughes – Director, Oriel Davies Gallery

Gill Ogden – Artistic Programmer, Aberystwyth Arts Centre

Ffion Rhys – New Visual Arts Manager Aberystwyth Arts Centre

Hazel Sturt – Artist

Jeremy Turner – Artistic Director, Arad Goch

In Llandudno:

Mike Corcoran – Creative Education Consultant

Peryn Clement-Evans – CEO, Artistic Director & Principal Clarinet, Ensemble Cymru

Sarah Ecob – General Manager at Venue Cymru / Theatr Colwyn / Oriel Colwyn

Elen ap Robert – Artistic Director, Pontio

John Rostron – Co-Founder Sŵn & Welsh Music Prize. Director, Nation Music

Neal Thompson – Co-Founder, FOCUS Wales

In Cardiff:

Rebecca Gould – Head of Arts, British Council

Eluned Haf – Head of Wales Arts International

Paul Kaynes – Chief Executive, National Dance Company Wales

Elena Schmitz – Head of Programmes at Literature Wales

Members of Cardiff What Next? group.

Analysis

The key findings from the across the focus groups are:

- Additional funding is needed to support both artists and promoters internationally
- Networks are needed to enable internationalisation
- An international festival for Wales is required

The key findings from the initial analysis of the focus group data collection outline that the best way of showcasing the arts from Wales is to develop networks and partnerships both nationally and internationally. A third of contributors also recognised the value of presenting work at international showcases and festivals, but several participants also indicated that funding for attending global events needed to increase. Producers and promoters also require subsidising to travel to international events, and the development of networks was also highlighted as a useful way of seeing work to programme.

The barriers to showcasing also echo this economic theme, as the majority of focus group attendees outlined a lack of resource and funding as an issue. The wider shortage of a national vision and strategy also contributes to the current perceived inhibitors to showcasing.

In discussing potential public sector support mechanisms for showcasing the arts, the capacity for creating an international festival or programme was strongly supported across this data capture, alongside specific grants for artists to enable internationalisation of their work.

On the question of Wales' narrative, although generally the feedback was broad-ranging, the concept of a fluid identity and multiple narratives was repeatedly mentioned, rather than a single narrative formed around potentially difficult national and cultural stereotypes.

Question 1: From the point of view of the artist/maker/creative, what in your experience is the best way of showcasing the arts from Wales?

Keyword analysis: international showcases/ festivals (9), networks (7), funds (3) (to aid attendance at international events), good budget, across art forms (3), mixed media, translation, sector-specific, partnerships (2) Edinburgh festival (2), accessibility, sustainability, outside Wales, biennale, international, long lead-in time, Wales in Edinburgh – gets lost, academic conferences, narratives for Wales (2). EU focus, cross-artform solutions, Wales-based, UK-wide Wales event, ecosystem development, city/town-based festival, recognise the local (2), international commodity, higher profile (2), advocacy (3), seen by: producers, curators (2), EU audience, promoters (3).

Artists need good self-presentation: a good online profile and a good profile in the major presenting places in the UK – London, Manchester, Edinburgh as well as overseas.

Agents are really important as are the early venues – music venues, new writing companies such as Paines Plough, venues that nurture new talent such as Cambridge Junction. Pontio is doing a bit in North Wales.

Attendance at the major festivals and trade fairs – CINARS, Tanzmesse, Hay. The question was asked: "Is England an International event? We can get support to go to Bilbao but not to Brighton." Clarity from funders was requested. The point was made that Radio 3 and London is where the network for classical music is and also where the blockage is.

Prizes can form an important platform for promotion, particularly in literature.

Working with Wales trade missions is mutually advantageous. The business response was how it enhanced the distinctiveness of the trade mission.

Reciprocity is important.

Networks are important – Eurosonic and European Talent Exchange Programme Yourope – all EU funding now towards developing audiences and the markets so it incentivises – festivals and platforms.

Question 2: From the point of view of the producer/ promoter/ festival director/ venue manager, What are the most effective ways that you have experienced of seeing work to programme?

Keyword analysis: finance for travel (11) marketing; networks (10) timing, tourism + culture, second phase funding, live/ digital (4), quality of curation (3), internships (3), biennales (3), mentoring (3), longer-term planning (3), location (3), infrastructure, niche, international agenda, festival experience (3) touring arts/export (3) Documenta (2) programming (2), recommendations, showcasing work, exchange (2) personalised experience, continuous presence, IETM (2), consistency and resilience (2), word of mouth (2), co-curation (2), audience needs (2).

Producers and promoters also require funding to travel to international events, and the development of effective networks was also highlighted as an effective way of seeing work to programme.

Importance of researching the market position and knowing your audience and what you want to achieve. The example was given of the Dinefwr Literature Festival that wanted to be different and achieved significant success.

Venues and festivals choose from endorsements from different trusted sources. They look at existing networks. Promoting Welshness is not helpful, showcasing the best work from Wales and beyond together is the most successful.

Sector specific offerings and soft skills such as creative solutions to education are important markets for Wales.

It is important to develop tastemakers in Wales as well as bringing in international delegations. Showcase Scotland is a good model as both the selection of the artists and the delegates have strict results-based criteria – the artists need to be export-ready with strong backup and the delegates need to be able to book acts and tours (and if they don't, they are not welcome in following years).

Agents are vital to bridge the abyss between the artist and the market.

People want to go to where there are good conversations and the work is the hook. Cultural programme really important to have an industry event in a wider festival and have a half-day of wider cultural/heritage event.

Timing and time frames are important: two-three days maximum for showcasing and ensure the wider event is timed either to follow on from others so that bookers can go sequentially or at a time that is "freer" in the calendar.

Question 3: What are the barriers to effective showcasing of the arts from Wales?

Keyword analysis: time, resource/funding (17), vision/strategy (12), skills (5), bureaucracy (5) lack of Welsh voice, networks (4), long-term planning (3), digital marketing (3), recalibrate the arts/ humanities via STEM, transport, leadership (2) short-termism, education, identity, Cardiff centric, mentoring, co-operation, translation (2) absence from international events, peer learning/ sharing, lack of agencies, confidence, language barriers (2), ecosystem.

The barriers to effective showcasing also echo the economic theme, as the majority of focus group attendees outlined a lack of resource and funding as an issue. The wider shortage of a national vision and strategy also contributes to the current perceived barriers to showcasing.

In terms of funding, long-term, flexible funding was cited as a better model and examples of the Canadian Council were given as good practice. There is a need for a ten-year plan.

Evaluation to date is crude and not measuring the real returns on investment. Criteria for funding forces you into narrow measures where we actually need a broad set of impacts.

Proliferation of agencies and lack of integration is hampering progress. "The expertise lies within the sector – the team in Sŵn, Trac and FOCUS Wales but each go to different people for funding and don't function together" It was suggested that it would be better to give all the money awarded between them to core fund them to work together, to run their events and to allocate £500k for capacity building.

We are too small to have so many silos – we need at least 4 people to go at the Great Escape – A Welsh music export office/WMF would be a good solution.

Question 4: How would you like to see the public sector supporting international showcasing of the arts from Wales? Design your ideal vehicle/initiatives.

Keyword analysis: International festival/programme (8), Grants for artists (4), grants for biennales, worldwide partnerships/networks (3), exchange programme, LIFT + event, arts research, cross Wales event (3), work with inward investment, no major festival, cultural exception, private sector finance, national government money, shut hospital, Welsh schools shut, plastic bag tax, money spent on sports/health, tax exemption (3), Welsh Bacc (2), residency (2), Europe (2), Brexit, less restricted funding, arts/science/academia funding, all-Wales ticketing, leadership, strategy, Western cultural powerhouse, artists retreat, youth focus, network of festivals, interactive, collaborative, creative sector database, Wales Theatre Sandbox, impact/output-free funding (2), strategy (2), media coverage/marketing (2), HE collaboration, travel to international showcases, support leaders in the field, research into international models, invest in residency, pay for promoters to attend, classical Expo in Rotterdam (Creative Scotland), Welsh Music Export office, work together, ecosystem, supply chain, cross sector working.

The groups then looked at potential public sector support mechanisms for showcasing the arts and the potential for creating an international festival or programme was strongly supported across this data capture, alongside specific grants for artists to enable internationalisation of their work.

Leadership and rationalisation of public bodies was asked for too.

Question 5: Does Wales need a “narrative” – What would you like to see Wales doing in order to profile its arts and culture better internationally? How much would that cost?

Keyword analysis: Post-industrial countries, no single answer, multiple communities, fluidity identity/narratives (6), forward focused (3), future narratives, fragile ecology (2), financial commitment, £400-500k, encouraging young people, use the arts created, hillside, vales, coasts, remove negative perceptions, one voice, working together, cauldron of creativity (2), cutting edge country, funding for artists, champion of arts, prized, valued, well-resourced, consistency, flux, continuity, new work, family festival, contemporary culture, showcase, well-being, exchanges, living wage for artists, open ended R&D, romantic, loving, strong, accommodating, multicultural, contemporary Wales, funded, long-term investment, strategy, don't need one, work out there (2), European, international festival (2), local viewing, ignore media, higher media, multicultural Wales, right language, continuity, celebrating values,

APPENDIX 5

INTERVIEWS

We are grateful for the time, input and experience given by the following experts from across Wales and internationally who were interviewed over the course of this research:

Adam Budak – Curator, National Gallery, Prague. Judge for Artes Mundi 5

Pauline Burt – CEO of Ffilm Cymru Wales

Nick Capaldi – Chief Executive Arts Council of Wales

Claire Chappell – Visit Wales

Desmond Clifford – Director General for the Office of the First Minister and Brexit, Welsh Government

Peter Doran – Director, Torch Theatre

Sarah Ecob – General Manager at Venue Cymru / Theatr Colwyn / Oriel Colwyn

Dafydd Elis-Thomas AM – Minister of Culture, Tourism and Sport

Liam Evans-Ford – Executive Director Theatr Clwyd

Aboubakr Fathalla – International Engagement Manager, Cardiff Metropolitan University

Graeme Farrow – Artistic Director, Wales Millennium Centre

Heledd Fychan – Head of Policy, National Museums and Galleries of Wales

Phil George – Chair, Arts Council of Wales

Michael Garvey – Director of BBC National Orchestra and Chorus of Wales

Martin Green – Director & CEO, Hull UK City of Culture 2017

Chris Gribble – CEO, Writers' Centre Norwich

Sharon Heal – Director, The Museums Association

Bradley Hemmings Artistic Director and Chief Executive of Greenwich+Docklands Festivals

Phillip Hughes – Director, Ruthin Craft Centre

Steffan Jones-Hughes – Director Oriel Davies and chair VAPG

Will Jameson – Founder, Lake of Stars Festival, Malawi

Ann Jones – Curator, Arts Council Collection

Fergus Linehan – Director & CEO, Edinburgh International Festival

Ruth Mackenzie – Artistic Director, Holland Festival and Theatre du Chatelet

Karen MacKinnon – Director, Artes Mundi

Sandeep Mahal – Director, Nottingham UNESCO City of Literature

Ben Mandelson – Founding Director, Womex

Rebecca Matthews – CEO, Aarhus European Capital of Culture 2017

Nick McDowell – Director of International and London, Arts Council England

John McGrath – CEO & Artistic Director, Manchester International Festival

Elgan Morgan – Policy and Public Affairs Manager South Wales Chamber of Commerce

Betsan Moses – CEO, Eisteddfod Genedlaethol

Joanna Quinn – Director, Beryl Productions

Chris Ricketts – Director Fieldworks and Consultant on Surf the Wave

Elen ap Robert – Artistic Director, Pontio Arts

Sanjoy Roy – Director, Jaipur Festival

Paul Russ – Director & CEO, Dance4

Elena Schmitz – Head of Programmes, Literature Wales

Anthony Shapland – Artist. Co-founder, G39

Fiona Stewart – Director, Green Man Festival

Sally Tallant – Director, Liverpool Biennial

Ed Thomas – Playwright and co-creator of Gwyll/ Hinterland

Neal Thompson – Co-founder, FOCUS Wales

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APPENDIX 6

EVALUATION AND ANALYSIS OF THE ARTS AND EVENTS IMPACT STUDIES AND RETURN ON INVESTMENT

In this annex we report on our investigation of recent evaluations of economic impact and return-on-investment (ROI) studies for the creative sector. Some are in Wales but competitor countries and regions are also surveyed using 14 reports on the impact of cultural events. But firstly we provide an overview of the methodology of impact assessments.

INTRODUCTION

There is increasing awareness that, despite decades of economic impact studies and evaluations, the creative sector – and in particular that part of the sector receiving public funds – will have to produce clearer evidence of the added value and economic impact of different arts programmes if the evidence base is to be robust enough to allow prioritisation of funding choices and other types of support. It is also clear that the current drivers for investment in the sector are increasingly those that highlight the impact on counteracting inequalities in society and these, together with the economic impacts, are the vectors that ultimately determine the return on investment.

To achieve impact and adequately measure the wider return on investment the sector will need to create better links between the intrinsic value of arts and cultural programmes, on the one hand, and the social and environmental impacts within the traditional economic indicators. However, once the assessment criteria are broadened, measurement problems immediately arise in trying to capture the main outputs from a particular arts programme.

In order to address these problems, many of the economic impact studies have been supplemented by survey work to ascertain the perceived value of arts projects by consumers. This often involves asking people who attended or used the programme what they got out of it, as well as asking those who didn't attend the event (but could have) what they feel about it – i.e. do the non-attendees appreciate the programme being available to them even though they may not have had the time to avail themselves of it. In other words: do you like the fact that the National Museum is there and available even though you rarely use it?

Typically these two elements – impact studies and perceived value – are then augmented by the use of narrative and case studies to draw out the softer, social outcomes of arts programmes i.e. those outcomes that are often more difficult to capture.

The trouble is that each element in the assessment is only as good as the research methodology and practice that underpins it. And there have been significant criticisms of each component involved in the evidence gathering process.

THE ECONOMIC IMPACT OF ARTS PROGRAMMES

In the context of this report, economic impact studies fall into two categories. The first relates to those studies that are based on an underlying economic model that utilises the direct inputs, like expenditure or employment totals, to estimate the indirect and induced impacts. The multiplier is then calculated from these modelling exercises. The second approach relates to those studies that simply import a multiplier from some other piece of analysis – usually undertaken by a different researcher in a different area. They then apply this multiplier to whatever direct inputs they can identify in order to assess the total economic impact. Quite often these imported multipliers are quite large; figures ranging from anywhere between three and five are quite common. This sort of analysis is open to challenge and, especially when no underlying analysis of the size of the multiplier is provided, it can undermine the authenticity of a report.

Where an underlying model has been used, the economic impacts of various programmes can be estimated quite effectively for a regional or local economy and compared with similar studies in different sectors to gauge the consistency of the multipliers being used. However, where multipliers are simply imported from outside the study in order to estimate the total impact it will be necessary to be very precise about the spending profiles and other inputs being used in the calculations. Also, there will be a need to ensure consistency with other studies in related sectors to ensure that the impact is not being artificially inflated.

In our review of recent evaluations of the impact of arts events and programmes that follows this introduction, we highlight some of the data gaps that make the conclusions of a number of recent studies difficult to authenticate.

Even where the impact assessment has been supported by a robust methodology there can still be problems with accurately estimating the total impact. For example, what direct and indirect spending should be included? If people's travel expenses are included then this could bias the results because much of that expenditure will leak out of the economy and onto the balance sheet of the (often non-local) bus or train company. In this way, spending leakages are quite often not captured properly.

Similarly, 'dead weight' expenditure by people who would have spent money anyway in local hotels and restaurants and also 'displacement' expenditure, by people who avoid an area because of the event, are not estimated accurately. In short, studies need to accurately capture both the additionality and the net expenditure related to the arts activity otherwise they lead to exaggerated estimates of impact.

In addition, even if these weaknesses are addressed effectively, there is still the problem that some of the wider positive impacts are not captured by an economic impact assessment. These include environmental and health benefits or regeneration and social benefits as well as the benefits obtained from reinforcing or enhancing cultural values. For these reasons, despite the popularity of the impact assessment method, it only provides a partial solution and there will always be a need to supplement this research and capture some of the added value through related case studies and surveys.

MEASURING VALUE IN ARTS AND CULTURAL PROGRAMMES

Measuring the intrinsic value of arts programmes can be difficult (see the AHRC Cultural Value Project). As well as capturing intrinsic value there is a need to recognise cultural value.

That is why many reports – including those in this annex – often use both qualitative and quantitative data to measure value but they still find it challenging to capture the full contribution of arts and culture in terms of economic impact. In this respect, our analysis highlights the scarcity of consistent quality in research methods in many of these broader studies as they attempt to integrate quantitative and qualitative methods. The specification and research design of some evaluations lack the objectivity needed for authenticity.

Qualitative research can offer greater depth of insight and is better suited for some research objectives but it need not be less rigorous than quantitative studies, even though the latter utilises empirical evidence on value creation and provides detailed data analysis. Each approach has its own costs and benefits.

The best empirical studies use effective controls to capture value without overstating the impact and use qualitative evidence to support the underlying conclusions from the data. It is important to highlight good research design and methodology where it is effectively implemented in order to encourage its use in future work.

By using a blend of quantitative and qualitative research the evaluation reports analysed below highlight the creative and innovative opportunities of arts programme and the way in which they help create more balanced communities; i.e. communities that are more engaged in cultural activities. This engagement can improve other socially desired outcomes and also generate wider benefits in terms of health and wellbeing. In addition, these reports can also highlight the ways in which arts programmes and cultural activities feed into the creative industries and attract financial investment into towns and cities.

To capture some of the added value many reports emphasise the important interrelationships between publicly funded programmes and commercial programmes. It is not simply a question of competition between the two sectors; it's more a question of complementarity. The intrinsic value of publicly-funded arts programmes can be enhanced by the support they offer to commercial arts programmes – e.g. introducing new ideas and art forms that encourage commercial performances to expand their creative content.

One area where publicly funded arts programmes add value is in education. Their main contribution is to help underpin learning outcomes, such as problem solving and communication skills, as well as improving confidence and motivation. Publicly funded arts programmes can also widen modes of engagement through the use of small-scale adapted spaces and temporary facilities in community centres.

In order to effectively capture this added value there needs to be more emphasis on the independent evaluation of programmes and the wider application of evaluation as an important instrument in measuring cultural value. At the outset of a programme an ex-ante evaluation should be formulated that focuses on monitoring the key drivers of value creation – focusing on capturing the data that would better inform the ex-post evaluation at the end of the programme. This would help arts and cultural organisations to understand the wider added value that flows from their activities.

[Understanding the value of arts & culture: The AHRC Cultural Value Project; Geoffrey Crossick & Patrycja Kaszynska]

CASE STUDIES AND NARRATIVE TO SUPPORT ARTS PROGRAMMES

Qualitative and quantitative research on economic impact can be usefully supplemented by a wide range of social science research methods, including the use of rigorous case studies. However, this (often anecdotal) evidence has difficulty being replicated in other studies or scaled up to measure value across a region. Despite this, many studies use in-depth, case study evidence to try and demonstrate the wider contribution of arts and culture to economic regeneration, community engagement, social inclusion, diversity and health and wellbeing. In this way they expand the range of research approaches to try and capture the breadth of knowledge, information and awareness that arts programmes bring to the community.

In terms of regeneration, an evidence base is being developed through case studies to demonstrate the contribution of arts and culture to areas like social and environmental regeneration as well as economic impact. In addition to new business investment, case studies can highlight the contribution arts programmes make to re-designing local living spaces and bringing communities together to increase organisational capacity at the local level. These activities can help address ‘wicked’ issues like drugs dependency. However, the causal links between cultural initiatives and crime reduction can never be rigorously tested and so case studies are best seen as a way of creating a “body of evidence” through association.

Also, by providing evidence on the links between publicly funded and commercially driven arts, they can point to the way in which cultural programmes can help build stronger relationships between the public and private sectors in general.

At a regional level case studies are useful in highlighting the importance of cultural tourism and the impact arts and culture can have on improving the image and profile of a city or region. This type of evidence can support more detailed economic impact analysis in terms of verifying overseas tourist numbers and identifying visitor spending patterns. If implemented carefully, a case study approach can provide cost effective additional evidence on impact without the need for detailed surveys and intricate modelling exercises.

However, the emphasis should be on providing additional evidence to support a more in-depth evaluation. Case studies on their own are rarely sufficient to provide the sort of balanced cost benefit analysis that will satisfy the needs of funders and other stakeholders and allow the prioritisation of funding across different arts projects.

But, because economic impact evaluations are themselves limited in their scope to capture cultural value, the narrative element of case studies can usefully be integrated into impact evaluations to develop a broader evidence base that helps cultural organisations make better decisions.

SOME RECENT EXAMPLES OF IMPACT STUDIES

As an example of some of the issues outlined above we have reviewed some recent evaluations of economic impact and return-on-investment (ROI) information for the creative sector in Wales and competitor countries and regions. This involved researching 14 core texts, alongside secondary sources, taken from a wider reading list of 84 reports (see Appendix 2).

ECONOMIC IMPACT

The concept of ROI within the arts and cultural festival environment is linked heavily with the evidence of ‘economic impact’ in cultural, educational, economic and environmental contexts.

The first thing to note is that the reports refer to a variety of events and attempt to estimate the economic impact of each utilising different methodologies. This means that direct comparison between festivals, programmes of work and one off events is problematic. Indeed there is no generally widely applied and accepted economic formula as to how to measure the contribution of cultural festivals and related events, to their respective local economies.

For example, in the report, *From Glyndebourne to Glastonbury: The Impact of British Music Festivals* (Webster and McKay, 2016), there are generally very positive financial projections made but the analysis does require examination methodologically, and more importantly for realism.

Similarly, reporting the economic impact of Lumiere 2015 Evaluation in the Policy Research Group's (Durham University, 2016) review provides another example. The report quotes the figure of £6.5m and outlines the underlying approach that is used to capture this information, which involves a representative sample of 1,960 visitors, from an estimated 200,000 who completed a survey. This is used to capture visitor spend which is then averaged across the regional demographic to obtain a total value that is then multiplied by 1.25. The multiplier and the total value were calculated using the BIS (2009) sub-regional estimates model.

There is no attempt to verify that the underlying model applies to the Durham area but at least it offers an element of reliability because using a UK Government standardised approach (that can be replicated) is more robust.

In comparison, the Manchester International Festival (MIF) employed external consultancy New Economy to calculate the economic impact of the 2017 festival, which is stated as contributing to £40.2m to the Greater Manchester economy. Unfortunately, the formulae for generating this figure is not published, so ascertaining the validity of this economic claim is not possible. The 2015 incarnation of the festival utilised Cambridge Policy Consultants approach, which was previously adopted in the 2006 Feasibility Study that provided the primer for MIF. This at least provided a level of transparency to the estimated impact.

The WOMEX 2013 Event Report (Cerdd Cymru Music Wales, 2014), evaluation employs the eventIMPACT calculator, which offers a scalable and repetitive method for calculating the economic impact of events.

The total direct economic impact of the event is estimated to be £2,896,232, and the level of financial detail presented in the report certainly offers a level of reassurance, or at least a statistical rationale to get to this finalised figure. However, alongside the eventIMPACT calculator, the report also utilises a separate WOMEX economic calculator to produce an estimated financial benefit of £3,149,093, which introduces a combined multiplier of 1.31 to supplement visitor spend and local production costs to come to this enlarged figure.

The follow-up evaluation to WOMEX 2013: Four Years On (Wynne, 2017) features little of the previous report's financial detail focusing instead on qualitative responses to the personalised financial impact of the artists presenting at this exhibition. It reports that 58% of respondents to the survey claimed that the festival offered over £10k of business value generated through attendance at WOMEX.

However, this is contradicted by the fact that the report also states that only 50% of respondents said that WOMEX has a high and lasting degree of impact upon their business or career. These estimated figures are not interrogated through qualitative interviewing to explore the reasoning for these estimates, and given that the study features no defined population sample undermines the validity of these conclusions.

These particular issues with estimating economic impact are not apparent in the Hay Festival Report *Imagine the World* (2017) evaluation where economic outputs are internally focused with simple metrics around books and ticket sales measured against previous festivals rather than introducing predictive and expanded figures.

This approach, in part, reflects the relative rurality of Hay-on-Wye and the imported micro-economic climate of the Hay Festival (in similar vein to the Glastonbury Festival effect).

MEDIA IMPACT

The advertising value equivalent (AVE) measurement is widely used to attribute representative economic value to the success of an event. It refers to the cost of buying the space taken up by a particular article, had the piece been in a paid-for advertisement, this has been extended to social media channels in recent times. A summary table of published AVEs from this literature review is presented below:

Festival	Total AVE
Manchester International Festival 2017	£29.09m
Manchester International Festival 2015	£27m
Hull UK City of Culture 2017	£450m

Media reach, or the total number of different people, exposed at least once, to a medium during a given period, is the other metric that is published as a measure of success for events of this nature. See examples in the table below:

Festival	Total Reach
Hay Festival 2017	1.8 billion
Hull UK City of Culture 2017	37.3 billion
Manchester International Festival 2017	10.3 million

The variance in total reach between these programmes can be attributed in part to length of engagement (Hull is one year, Hay over several weeks), but much as with economic impact, the process for calculating the final figures differs.

The Hay Festival adopts press mentions x outlet circulation, which is seemingly appropriate and in line with sector practice (Sissors & Baron, 2010). MIF uses press/broadcast mentions x 2.5 to produce the estimated figure, but excludes online coverage, which may in part explain the significant differences between the festivals. However, note that the Total Reach figure for Hull is just over three times that of Manchester but the AVE figure for Hull is fifteen times greater. This is difficult to explain and the Cultural Transformations: The Impacts of Hull UK City Of Culture 2017 (University of Hull, 2018) report, presents no information on how they came to this figure and so it is difficult to assess in terms accuracy.

EDUCATIONAL IMPACT

The need for festivals and events to incorporate educational elements to secure further public funding and access collaborative financial support is a present need for festivals organisers and the ability to evidence this through evaluation is equally important. This is expressed in the Edinburgh Festivals: Thundering Hooves 2.0 (BOP Consulting, 2015) evaluation of the event with the exemplar of Edinburgh Napier and Queen Margaret University's events management degree programmes framed as a by-product of the festival's success. What is less clear is the uptake, attrition rates, and alumni success of these courses and their feed into the current festival's operation. More reassuring is the report's emphasis on outlining how training, apprenticeships, and internships linked with Edinburgh Guarantee (which seeks to guarantee work/experience or education for school leavers in the area) is effectively working. Although due to both the qualitative nature and lack of information around the make-up and number of 'forums' used to evidence the study, an element of selective bias must be assumed.

In contrast, the Hay Festival Report: Imagine the World (2017) uses attendance as its barometer of educational success with 48% increase in schools participating in the Primary Schools Day, and a 26% increase in schools participating in the Secondary Schools Day. The reporting for Lumiere 2015 takes a similar approach by using the example of the Artichoke education project, which drew in almost 1,400 people of all ages, from a range of locations and socio-economic backgrounds. While the Manchester International Festival (2017) evaluation takes a refreshing approach to evidencing this impact by focusing on the participation of 68 educational partners and 57 learners in the performative elements, rather than just attendance at the festival.

ARTISTIC IMPACT

The Arad Research report, The value and impact of Wales' presence at the Venice Biennale for the visual arts sector in Wales (2015), struggles to outline precisely what the perceived benefits of artistic involvement at this event entails. Instead stating in generic terms that this Biennale has "significant impact on Wales' international profile" (p.2) and this is discerned from the survey response of 121 key stakeholders from the visual arts sector in Wales/the UK. The sample size is one of the larger data captures in this literature review, but given the statement around international profile, it features only UK based participants with presumably limited awareness of transnational impact. This therefore undermines the validity of that conclusion.

The Lumiere 2015 evaluation offers a level of qualitative certainty, through its innovative use of the Quality Metrics platform (Arts Council England) to capture the intrinsic artistic value of events and festivals. The results benefit from the triangulation of artist, organiser and the public perspectives to conclude that the festival was successful in creating "local impact" and "enthusiasm" for the event. But this triangulation of findings is slightly undermined by the population of artists only being 2 respondents (where n=72), so caution must be taken in overestimating the artistic success of this event. However, it should also be noted that the use of the Quality Metrics platform offers a standardised approach to assessing artistic value and therefore could be used more widely to offer more rigour in what is typically a highly subjective area of evaluation.

SENSE OF PLACE/ PROFILE IMPACT

Several texts within this review evaluate the positive influence of artistic and cultural outputs on the geographic region in which they are situated. The On the Move (2013) Evaluation of the International Opportunities Fund and its Impact on the Mobility of Arts and Cultural Professionals based in Wales outlines that the funding for artists helped "raising awareness and interest for the Welsh arts abroad". This positive international impact is also echoed by Arad Research report (2015) on the presence of Welsh artists at Venice Biennale, and both reports share a communality in terms of collection of survey data and in the case of the former an excellent response rate with over 30% of grant recipients contributing to the evaluation.

The Lumiere 2015 Evaluation (2016), in comparison, focuses on the granularity of Durham rather than national/ international impact. 90% of responses to the large-scale survey show that visitors valued the use of iconic, local locations contributing to "civic pride and sense of place". The MIF also assessed this impact with 82% of contributors agreed or strongly agreed with the statement that the Festival makes Manchester a great place to live, work and study. The strength of these localised responses should signal the potential impact of a national festival in Wales.

INTERNATIONAL IMPACT

Cultural and artistic events are encouraged to grow a global audience and export the artistic outputs, which means that internationalisation is a focus of several of the evaluations contained within this review.

Edinburgh Festivals: Thundering Hooves 2.0 (2015) centres on the evaluation of the initial Thundering Hooves programme around the positioning of the festival through world-wide marketing, transport, education and sustainability goals. While the report is positive about the intercontinental growth of the Edinburgh Festival City, the report features a cautionary message around balance of the relationship between the live and digital experience, saying that there needs to be an agreed “approach to digital platforms and the digital brand” (p.12). This need to widen international awareness through digital transnational markets could bring a new virtual global audience to the festival. This is important, but it must be counterbalanced with the authenticity (and economic spend) of physical attendance at the Festival.

This reach for internationalism is also represented in the spread of 300 artists from just under 100 countries who attended the WOMEX 13 event. The report from Cerdd Cymru Music Wales (2014) evidences transnational outreach in assessing the artist development programme where 58 Welsh acts applied to showcase at the event and engaged with the international Sonic Bids Electronic Press Kit (EPK).

This drive to market artists internationally was made sustainable by the EPKs as they were also made available for publicity purposes for the SXSW and North America Folk Alliance.

The issues of resourcing international artistic development and mobility is covered in detail by the ‘On the Move’ report into International Opportunities Fund (2013). The evaluation outlines that international organisations hosting Welsh artists experienced a number of impacts ranging from networking to professional development, alongside audience development and a heightened profile of Wales internationally. Still, previously stated methodological issues aside, the authors of the report highlight that “a few” participants struggled with “challenges to keep the contacts with some artists and professionals after their return to Wales” (p.4). This analysis illustrates that a network of international collaboration should be developed and resourced to make it sustainable in order to support a new globally focused festival.

To conclude, the European Capitals of Culture (ECoC): Success Strategies and Long Term Effects (Beatrix Garcia, 2013) suggests that initiatives like the ECoC can be a catalyst for image change around cultural and social projections of an area. This, according to Garcia, has allowed Glasgow 1990, Lille 2004, and Liverpool 2008 to very successfully change their respective images. The impact of an international cultural festival, or series of global portfolio events, could potentially shift mindsets around stereotypical views of Wales and Welsh culture and art in line with the ECoC experience.

SUMMARY

The key findings of this review are that methodologically the tools for assessing economic impact are wide and varied. There are also pitfalls in applying impact assessment tools to the cultural sector. Robust modelling and data gathering can overcome some of these, but wider social and cultural impacts remain difficult to capture and measure in ways that are generally accepted and employ techniques that can be replicated across the sector.

However, this review does outline two potential models, eventIMPACT and the BIS regional estimated model that could be employed with consistency to assess a new international festival. The inclusion of advertising value equivalent (AVE) to the estimated financial impact of these programmes is open to inflated numbers and should be included with caution in summative economic totals.

The educational outputs and measures in the evaluative literature provides the simplest best practice model. The Hay and Lumiere Festivals both utilise attendance as an accurate measure of engagement with education, and despite the lack of data capture around learner-gain or knowledge acquired, participation data is a good baseline to utilise longitudinally.

Another replicable method, using the Quality Metrics system, for capturing qualitative data around artistic impact is employed in the Lumiere 2015 Evaluation. The adoption of this model by the Arts Council England (ACE) gives the process and outcomes the benefit of being comparable and widely used in ACE funded projects. This research capture tool should be considered for adoption by other evaluative studies of this nature in the future.

Finally, the international impacts explored in this review present two main findings for successful future event delivery and evaluation. First, that attendance monitoring of international artists and spectators is a useful barometer of engagement (see WOMEX 13), and lastly, that a large-scale cultural event such as ECoC can create image perspective change that is long term.

THANKS AND ACKNOWLEDGEMENTS TO

John Barker, independent research consultant

Rosa Bickerton, Arts Officer, British Council Wales

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