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To the Responsible Authorities for the BoomTown Fair at Matterley Bowl in Hampshire

I have been contracted as the Event Consultant for BoomTown Fair at Matterley Bowl in Hampshire since the start of 2013. During this time I have been heavily involved in advising the Event Directors, Chris Rutherford and Lak Mitchell, and team, on a variety of matters. I have worked on-site at the festival in 2013, 2014 and 2015 for 8 days during each year monitoring the implementation of tactical and operational plans, advising staff where appropriate and fully engaging with the multi-agency partners. Over the last 3 years tremendous improvements have been made by BoomTown Fair, delivering a safe festival at a time of annual growth, a huge and noteworthy achievement.

The festival is delivered annually with changes derived from a thorough de-brief process, both internally within BoomTown Fair and externally with key stakeholders, such as the Safety Advisory Group. Each year the promised changes have been delivered within an ethos of continuous improvement that enhance the 4 Licensing Objectives - Public Safety, Protection of Children from Harm, Crime and Disorder and Prevention of Public Nuisance. This is fundamentally why the festival keeps progressing in such a positive direction - it considers what changes it wishes to make, it consults, it plans, it implements, it delivers and it de-briefs and learns - every year.

2016 is no different. I have been personally briefed by the Event Directors on the proposed increase of 10,000 people for this August, bringing the attendance up to 59,999. With similar increases having been achieved over the last 3 years I can see no real reason or concern as to why this new attendance limit cannot be safely delivered.

I am entirely confident that the experienced BoomTown Fair team can safely manage an additional 10,000 people on the site. Why state this? There is adequate camping and space around the event site, in particular with the new planned West Car Park plus camp site and campervan field, the movement of Whistlers Green and Kidz Town, allowing for larger open spaces within the event layout. There is adequate space for the additional people and plans in place for effective music programming to ensure safe crowd management of the late night areas is delivered. The security and stewarding levels, supported where appropriate by the agreed policing support, will reflect the additional people on-site, as will the essential infrastructure required - water, toilets, waste management, and so on.

There has been due regard and consideration taken to protect the South Downs Way in the festival expansion plans so as to minimize, as the festival always tries to do, the impact on the local environment and community. Recent festivals show that pro-rata there is a low crime and disorder risk, as evidenced by the public disorder and violent crimes statistics. The festival medical and welfare provision is first class and is administered in a manner that any event would be proud of in the country. The incremental increase in traffic will once again be effectively managed and controlled by the experienced traffic management company who have intimate knowledge of the landscape.

Over the last few years the festival has become very well managed by a good and experienced team. The contractors and many team members who work for or at BoomTown Fair I see at the other 6 UK festivals where I work and I can confirm that they are amongst the best in their field, evidencing that BoomTown Fair has contracted the right companies and staff for the right roles to maximize overall public safety, not be complacent and continuously improve. As the Event Consultant I am entirely happy that the proposal to increase the number of attendees would not adversely impact of the existing and planned model moving forward.

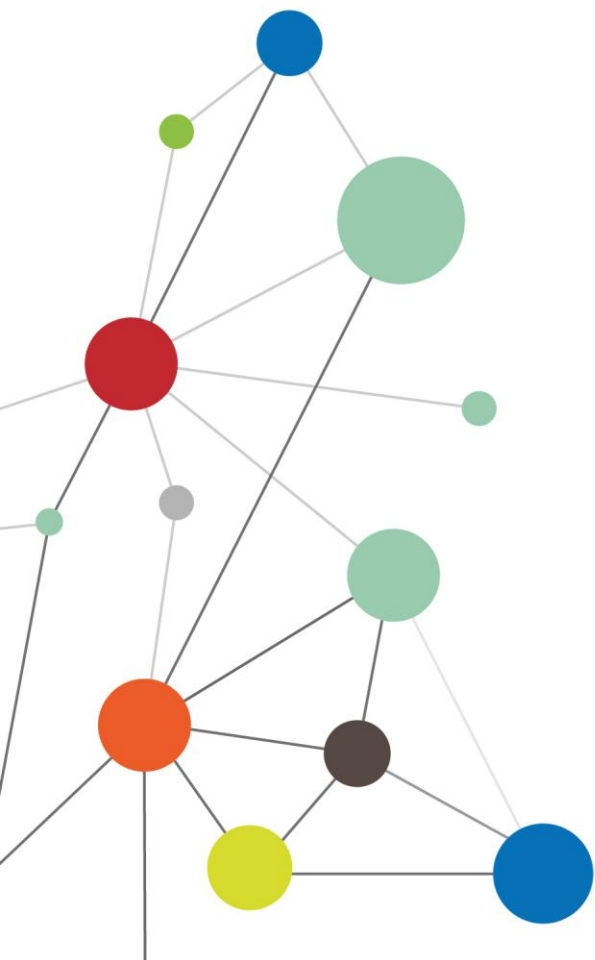
Adrian Coombs, Event Consultant, Major Events Boss Limited

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The Economic Impact of BoomTown Fair 2015



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This document has been formatted to allow for double-sided printing

Economic impact headline results

Key economic impact of BoomTown Fair 2015 on Winchester and wider Hampshire area

Gross local economic impact	£18.2 million
Net local economic impact	£7.4 million
Net festival attendee expenditure	£1.9 million
Net organiser and contractor expenditure	£3.8 million
Total net expenditure	£5.7 million
Multiplier expenditure	£1.7 million
Total net local economic impact	£7.4 million
FTE jobs sustained	123

1 Introduction

1.1 Background to study

1.1.1 This report is the second of a series of reports which will present the evidence of the economic benefit events hosted at the Matterley Estate bring to Winchester and the wider Hampshire area. The Matterley Estate is a family owned and managed farm producing milk, barley, wheat and oats. In addition to the farm businesses, several high profile outdoor events take place on the estate. The appeal of the estate to event organisers is the landscape quality of the estate – it features a natural amphitheatre known as the "Punchbowl" or "Matterley-Bowl" which is ideal for competitive racing events and music festivals.

1.1.2 TSE Research was commissioned by the estate owner to evaluate the economic impact of three major events taking place on the estate in 2015. These are the British Motocross Grand Prix, BoomTown Fair and Tough Mudder. Estimates will be made of each event individually before pulling the results together to estimate the collective impact of all three events.

1.1.3 This report presents the findings of the economic impact of the second major event of the year, the BoomTown Fair. The event took place on the Matterley Estate between Thursday 13th August to Sunday 16th August 2015.

1.2 BoomTown Fair 2015

1.2.1 BoomTown Fair is a music and arts festival. Founded in 2009, the festival centres on a fictional town with its own mayoral elections, passports and convoluted political history and offers an eclectic line-up of performers including folk, gypsy, reggae, punk, pirate, jazz, jungle, and techno.



1.2.2 The festival places emphasis upon sustainability, charity and community responsibility. Donations to various charities are made each year from the festival's profits. In 2015 these were the Energy Revolution Initiative, Winchester Youth Counselling and Trinity Winchester. Tickets are donated to charity for raffles and competitions, and the festival works with Oxfam and Isle of Wight Air Ambulance who provide stewards.

1.2.3 Although the 2015 figures are still being finalised, the festival has raised approximately £170,000 for charities, with nearly £30,000 of this going directly back into projects and organisations from around the Winchester area. In addition this year so far, the festival has raised a grand total of £68,217.59 to go directly to our 10 charity partner companies, two of which are from the Winchester area. The festival also produces a fundraising CD at Christmas which is very popular.

1.2.4 The festival holds annual workshops in the May half term school holidays. These popular sessions have over 150 attendees over the weekend, many of whom then take part in a carnival procession on Sunday at the event. These are hosted at the Discovery Centre near to the Matterley Estate.

1.2.5 Now in its seventh year and marking 'Chapter 7' in its history, it is one of the UK's fastest growing music festival.

1.3 Objectives of study

1.3.1 The main objectives of the study were to:

- Identify and quantify the full economic impact of the event on Winchester and the wider Hampshire area.
- Demonstrate the impacts clearly and show supporters and stakeholders the economic benefits accruing from the events for local businesses and communities.

1.3.2 In order to arrive at an estimate for the total amount of additional expenditure generated in Winchester and Hampshire as a result of the event taking place, the study involved the following methods:

1.3.3 **Visitor survey:** a face to face interview survey was carried out between Friday and Sunday randomly sampling visitors at various locations across the event area. The survey explored their demographic profile, event attendance and spending patterns. In total 591 visitors were personally interviewed. The definition of 'visitor' used in this study refers to the festival goers who attended the event (public ticket holders). It does not include the artists and their entourage, event organiser personnel, including all staff employed by the organiser, and members of the media. The expenditure incurred by these groups was recorded separately.

Business survey: a telephone survey was carried out with 170 local businesses. The survey focused on the impact of the event on turnover and staffing levels.

Trader survey: an online post-event survey was carried out among the 169 traders who had a stall at the event to establish the importance of the event to their overall income. Responses were received from 37 traders.

Economic impact modelling - using data derived from each of the above components to estimate the overall economic impact of the festival on the local economy. Only expenditure benefiting Winchester businesses and those located in the wider Hampshire area is included in this assessment. This will include expenditure incurred by all event attendees - visitors, artists and their entourage, journalists and other media representatives as well as BoomTown Fair crew, on items such as accommodation and food and drink. Event organiser expenditure will include money spent on local suppliers and contractors and staff from the local area.

1.3.4 Our approach is consistent with other event studies that we have undertaken and is based on the UK Sport approved *eventIMPACTS approach*, a methodological framework developed by UK Sport and six other public sector partners (London Development Agency, EventScotland,

Yorkshire Forward, VisitBritain, North West Development Agency and Glasgow City Marketing Bureau) to standardise the way in which the impacts of major music, sport and cultural events are measured.

1.3.5

Local area in this study is Winchester and this includes both the city of Winchester and the wider district. The district stretches over 250 square miles and includes a number of small towns and villages though 33% of the 118,000 residents live in the city (see map overleaf). A significant proportion of event attendee and event organiser expenditure will have been with businesses outside Winchester but within Hampshire, such as Eastleigh, Alton, and Southampton. Accurately distinguishes expenditure within Winchester and with neighbouring towns/cities in Hampshire was not always possible, for example a proportion of artists and their entourage and contractors would have stayed in hotels in other parts of the county. Therefore, for the purpose of assessing the economic impact of the event, we have extended the geographical area to include Hampshire. The overall net economic benefit of the event is presented on a Hampshire level.

Figure 1: Map of Winchester city and wider district

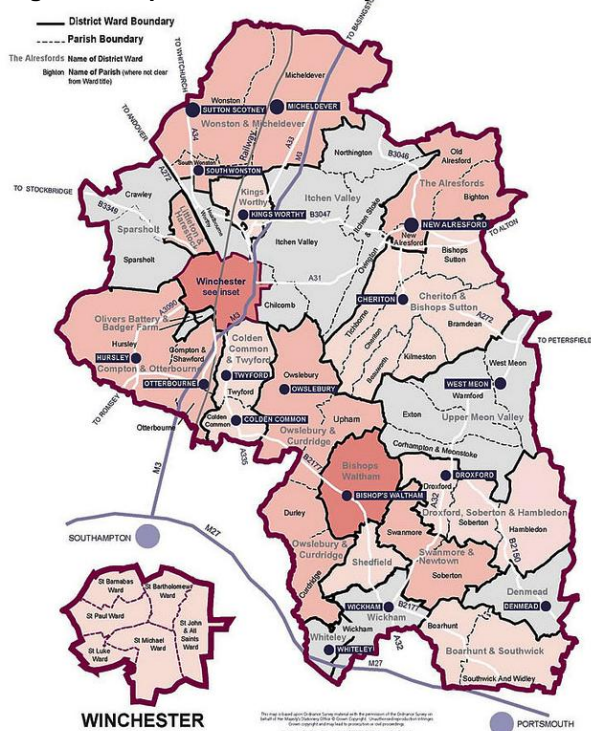
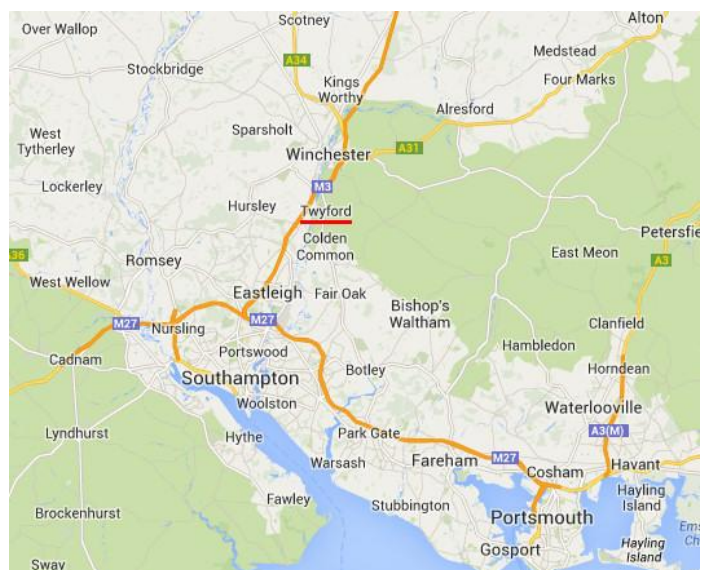


Figure 2: Map of Winchester and the wider Hampshire area



2 Audience Reach

2.1 Number of people attending the event

Total attendees = 46,156

2.1.1 BoomTown Fair 2015 was attended by just over 46,000 people. Visitors (public ticket holders) numbered 36,606 and the total number of artists performing at the event along with their entourage was 3,817.



36,606 visitors

2.1.2 The event attracted significant press coverage and was attended by 400 media representatives.



3,817 artists and their entourage

2.1.3 The BoomTown Fair organisers also employed several thousand people to assist with the running of the event both in the weeks leading up to the event and during the event itself (referred to in this report as BTF crew)



400 media representatives

Plus event organiser crew of 5,333

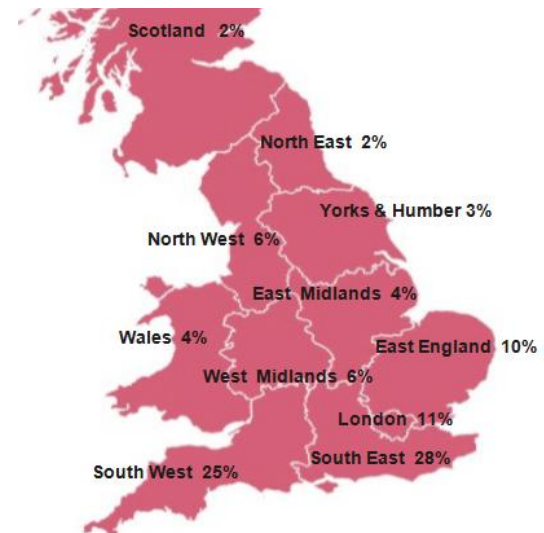
2.2 Where visitors travelled from

2.2.1 All but 6% of the 36,000 plus visitors were UK residents and they came from all over the UK. However, by far the largest proportion of visitors came from the South East and the South West of England.

2.2.2 Results for visitor residence at UK county level reveal that 59 different counties across England, Scotland and Wales were represented. Overall, 12% of the 36,600 (5,755) public ticket holders were Hampshire residents.

2.2.3 Visitors travelling to the event from overseas represented over 50 different countries.

Figure 3: Regions where visitors came from



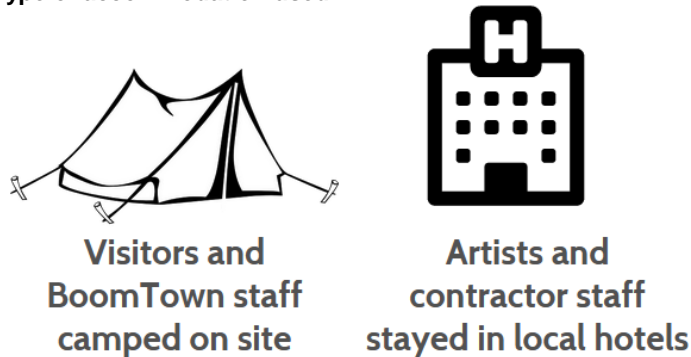
2.3 Visitor accommodation

2.3.1 All public ticket holders camped on-site at the Matterley Estate along with the vast majority of BoomTown Fair's own staff. Although no accommodation expenditure was incurred by both these groups, the vast majority stocked up on supplies of food and drink, toiletries and other items from local stores. BoomTown staff were the most frequent users of local supermarkets and convenience stores as many were based on site several weeks leading up to the festival as well as staying on site during the festival period.

2.3.2

Hotels as well as B&Bs and guest houses in Winchester and the wider Hampshire area were used to accommodate artists, crew, staff and media who attended the event. A number of the contractors used to assist with setting up the infrastructure of the event also used accommodation in the wider Hampshire area, in particular Travelodge hotels to accommodate their staff.

Figure 4: Type of accommodation used



2.4 Visitor group composition

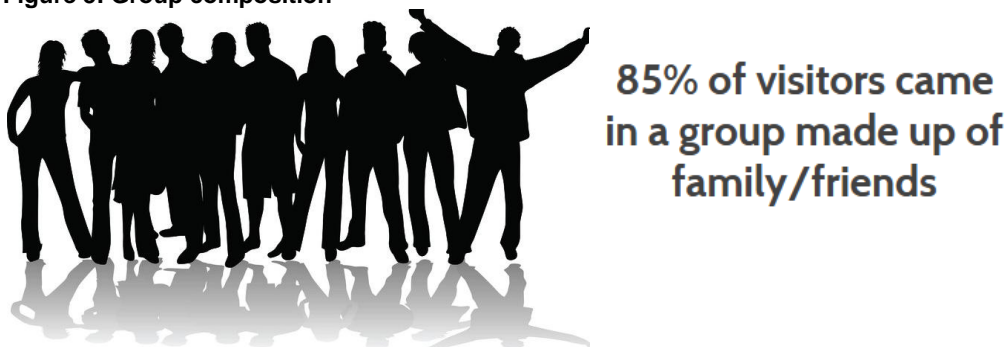
2.4.1

The vast majority of visitors travelled in a group – either with family members, friends or a mixture of family and friends. Overall 85% were at the festival with a group of other people; 61% of this overall proportion was made up of groups of friends.

2.4.2

Couples and other parties involving two people accounted for 11% of all visitors, and 4% were visiting the festival on their own.

Figure 5: Group composition



2.5 Visitor satisfaction

2.5.1

The high level of visitor satisfaction is self-evident in the finding that 82% of visitors stated that it was very likely they would visit BoomTown Fair again.

2.5.2

Nine out of 10 visitors (90%) stated that they would recommend BoomTown Fair to others.

Figure 6: Visitor satisfaction



3 Industry feedback

3.1 Impact on local businesses

3.1.1 A sample of Winchester businesses representing different business sectors were contacted by phone and invited to take part in a survey to find out about their experiences of the impacts of festival on their trading level. In total, 170 businesses took part in the survey, of which half were located near to the Matterley estate in the parish town of Alresford. The sample included hotels, supermarkets, convenience stores, petrol filling stations, pubs, restaurants, as well as a range of non-hospitality businesses including an IT firm, a car garage, and an interior design consultancy. The number of businesses taking part in the survey from each business sector is broadly reflective the relative size of each.

3.1.2 A key area of enquiry was feedback as to whether road closures and the increased traffic caused by the festival, particularly on the Thursday when the festival started and on the Monday when the vast majority of visitors left the site and returned home, impacted negatively on business performance. Concerns were expressed by a number of local business representatives in the lead up to the event that anticipated traffic congestion caused by the event would cause problems for some businesses either due to staff being unable to get to work in time or that customers would avoid the area during the festival leading to a decline in trade, or indeed both.

3.1.3 The results of the consultation with local businesses does not show strong evidence that a significant number of businesses experienced a loss of trade as a result of the festival. Overall, only 5% of businesses reported that trade dropped during the festival, whilst 15% reported an increase. The vast majority did not see any change in trading levels and experienced the level of trade they would normally expect over August.

Figure 7: Distribution of sample by business

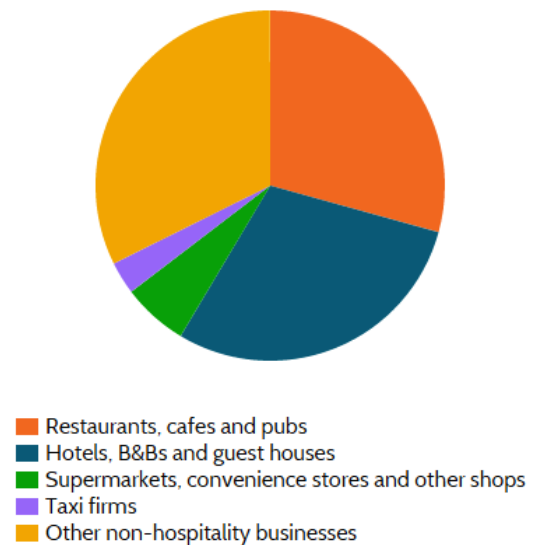
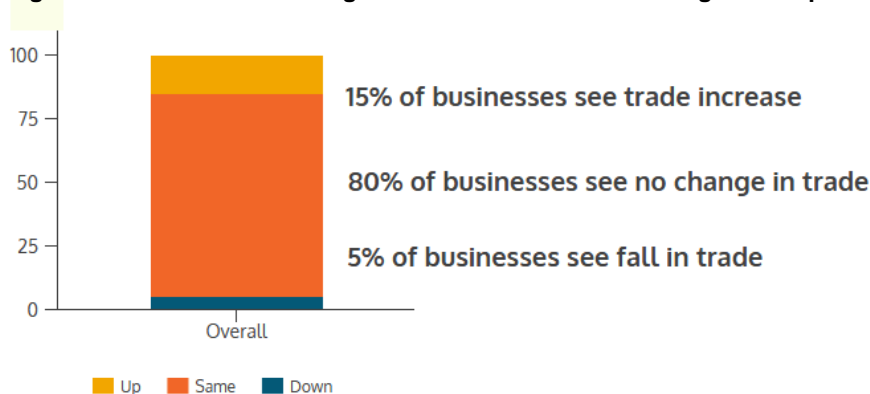


Figure 8: Level of trade among Winchester businesses during festival period



3.2 Impact on trade by business sector

3.2.1 The results from the business survey do show very clearly that the impact of the festival was not felt uniformly across each business sector. Taxi firms experienced the greatest benefit, with almost two-thirds reporting that trade was up during the period of the festival and each firm consulted directly attributed this increase to the festival. A number of supermarkets, convenience stores, newsagents and those selling camping related products also saw trade increase, particularly those closest to the Matterley Estate such as the Coop and Tesco Express in Alresford, and once again these businesses directly linked the increase to the festival.

Table 1: Level of trade among Winchester during festival period by business sector

	Increase	Same	Decline
Overall (all businesses)	15%	80%	6%
Restaurants, cafes and pubs	21%	67%	13%
Hotels, B&Bs and guest houses	6%	89%	4%
Supermarkets, convenience stores and other shops	20%	80%	-
Taxi firms	60%	40%	-
Other non-hospitality	11%	87%	2%

3.2.2 Given that the majority of artists and their entourage stayed in local commercial accommodation including the Holiday Inn Winchester, Mecure Winchester Wessex, The Winchester Hotel & Spa, and The Winchester Royal, it may seem at first surprising that only 6% of accommodation businesses consulted reported an increase in trade. It needs to be noted that August is a peak tourism month for visitor accommodation operators and most would expect to be fully booked over this month anyway. Therefore, had they not been accommodating artists etc as a result of the BoomTown Fair, their rooms would be occupied by other guests. Despite August being a peak month, a minority of accommodation businesses reported a fall in trade, but these were for reasons unconnected to the festival. It should also be noted that several artists were accommodated in campus accommodation at the University of Winchester and that the University did not take part in this study.

3.2.3 However, food and drink establishments close to hotels accommodating artists saw an improvement on their trade level as described by one tea shop owner.

“I knew that the hotel would be full of musicians staying there so I went over and spoke to the hotel manager to ask if I could leave menus of the food and beverages I offered for their guests and that weekend my takings were up by at least 20%”.

3.2.4 Business performance for restaurants, cafes and pubs was more mixed over the festival period. This sector reported the largest decline in trade – a fall of 13% due to less patronage during the festival period.

“We hope it does not happen again, our takings fell from the Thursday to the Sunday”. Restaurant manager

3.2.5 However, a fifth reported that trade was up and 67% reported no change in trade.

“It rained on one of the days and we sold loads of wellies and macs etc. There was an increase in camping equipment sales”. Retail store manager

3.2.6 Several non-hospitality businesses located in Alresford were also consulted as many of these businesses would be unlikely to benefit from an increase in footfall in the area as they would not normally deal directly from customers passing by such as IT firms, interior designers, furniture

shops, and light fitting and suppliers, but who may experience difficulties caused by road closures and increased traffic on the B3404, the A31 and the A272 such as difficulties sending and receiving supplies, hosting business meetings and staff getting to and from work.

- 3.2.7 A few businesses did experience problems with staff getting to and from work and one business experienced problems with visitors going to the wrong venue and turning up at their farm. But in general, businesses felt the benefits outweighed the problems with the traffic congestion and even though they did not personally gain financially from the event, they felt it was positive for the area as expressed in the sentiment below:

“It’s brilliant because it puts Winchester and Alresford on to the map and they do come out of the event and come into the town. For general shopkeepers it brings a lot of extra income but it doesn’t for me unless someone breaks down. There is congestion but that’s caused by the way the trafficking is organised by the police so if they were more organised it wouldn’t cause problems for locals getting in and out of the village”. Car mechanic at local garage.

3.3 Business views on impact of events

- 3.3.1 The majority of businesses felt that if organised well, events like BoomTown Fair are good for local tourism. It is also worth noting that several businesses highlighted that although the festival did not affect their own business in economic terms, they still consider large events like BoomTown Fair to be positive for the area.



“I think it is a good thing. It brings in trade and raises awareness of the area. If people cannot put up with a bit of noise and disruption that’s too bad. I like it and it is good to see a lot of people in the town. I think it is more positive than negative”. Convenience store owner

“It is great. Now the security is better it is a really good event. It has a good reputation as one of the best festivals in the country, so it does put Winchester on the map”. B&B owner.

“It is really good for Winchester, it brings people into the area and increases tourism for the future. People are aware of us more now”. Other

“I would say that events like that are good for the local economy as they bring people into the area. There was a little extra traffic and congestion, but was nothing too bad and the noise did not impact upon us here”. B&B owner.

3.4 Impact of event for on-site traders

- 3.4.1 Large events such as BoomTown Fair are an important venue for food and non-food traders. In total 169 traders were at the festival (111 were food and drink traders and 58 were non-food and drink traders). Nine of the 169 businesses were Hampshire based businesses of which 4 were Winchester businesses. This means that 95% of traders selling goods at the event were from outside Hampshire.

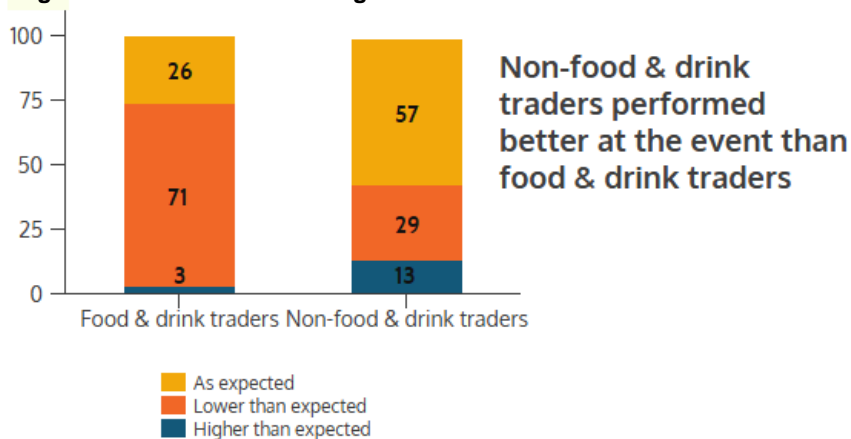
- 3.4.2 Part of the reason for the relatively low level of market traders from Hampshire is the difficulty in finding a large number of festival traders locally who have the capacity and experience to serve audiences as large as that found at the BoomTown Fair. To help strengthen the local economic benefit of BoomTown Fair, the festival organisers only allowed food and drink traders to source their produce locally. This condition created extra income for supply chain businesses such as Evans Butcher based in Alresford which supplied vendors with meat products and A G Axton &

Sons based on Droxford, wholesalers supplying food and drink stall with fresh fruit, salad, vegetables & dairy products sourced from local growers.

3.4.3 The 9 Hampshire traders and 28 non-Hampshire businesses took part in a short online survey to find out about trading levels during the festival period and the importance of the event in generating income for their business.

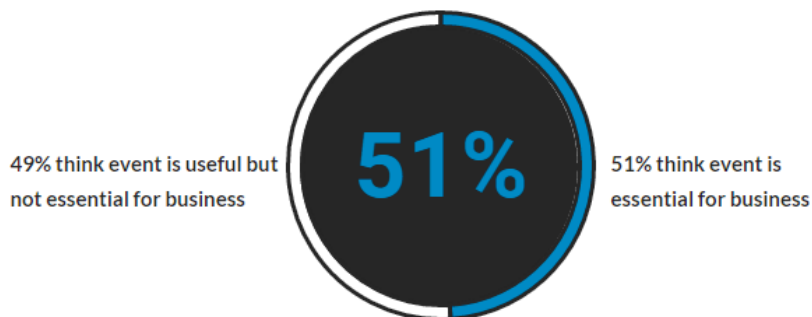
3.4.4 Non-food and drink traders generally benefited more from the event than food & drink traders. The large proportion of food & drink traders who reported that the overall level of business was lower than expected suggests that a significant proportion of visitors relied on self-catering opportunities as part of their camping experience. This will have benefited local supermarkets and convenience stores with festival goers stocking up on or replenishing food and drink consumed.

Figure 9: Level of trade among onsite food and non-food traders



3.4.5 Half of all traders reported that the event is an essential source of income generation for the year. August is generally a busy 'festival month' for festival traders with most being fully booked during this month.

Figure 10: Importance attached to event by festival traders



4 Economic impact

4.1 Attendee expenditure

4.1.1 The economic benefit music festivals generate for local businesses comes from two main sources. One is the expenditure incurred by the event organiser in the staging of the event. This is examined in Section 4.4. The other main source comes from all the people attending the event, the visitors, artists, media and the staff/volunteers employed directly by the event, because whilst they are in the area, these all these groups will make use of local provision such as accommodation, taxi and bus services, pubs, convenience stores, as well as supermarkets and laundrettes, particularly among those staying overnight in camping or caravan accommodation.

4.1.2 With a total attendance of over 46,600 people, the event offered income generation for on-site traders and local businesses.

4.1.3 Drawing on results from the survey of festival visitors, the average daily visitor expenditure per person at the event on food and drink, merchandise and entertainment was £69.63. Over half (59%) of on-site expenditure went towards the cost of food and drink. With nearly all visitors arriving Thursday morning and not leaving until midday on Monday, this expenditure covered 4.5 days and came to £313.35 per person over the festival period.

Table 2: Visitor expenditure on-site

On site expenditure	
Retail - merchandise	£12.24
Food and drink	£40.93
Entertainment	£16.47
Total daily spend	£69.63
Total spend over festival period	£313.35



4.1.4 The vast majority of visitors also spent money on goods and services such as food and drink and transport (e.g. taxis, car parking charges, and petrol) elsewhere in Winchester. Taxi fares and petrol fuel accounted for 56% of off-site expenditure.

4.1.5 Expenditure off site was lower. On average, each visitor spent £7.47 per day and £33.64 over the festival period elsewhere in Winchester.

Table 3: Visitor expenditure off-site

Off site expenditure	
Retail (non-food items)	£1.17
Food	£1.68
Entertainment	£0.19
Travel (taxi fares and petrol fuel)	£4.20
Other items	£0.24
Total daily spend	£7.47
Total spend over festival period	£33.64



4.1.6 Expenditure data was also gathered from artists and media representatives. The results show that artists and their entourage camping on-site spent on average £71.62 per person per day on food drink and other goods and £20.50 per day elsewhere in Winchester on transport, food and drink from supermarkets as well as eating out at restaurants and pubs. Artists staying overnight in hotels spent on average £58.50 at the event each day and £90.09 elsewhere in Winchester

including an average of £59.34 on accommodation costs. Approximately half of all artists and their entourage camped on-site for an average of 3 nights and half stayed for one night only in commercial accommodation.

4.1.7 Most Journalists, photographers and film crew attending the event stayed on-site over the festival period and spent on average £21.25 on-site and £21.47 off-site.

4.1.8 Another group incurring expenditure is the group of over 5000 staff, performers, volunteers and others working directly for the event organiser (referred to in this report as BTF crew). Many thousands will have been based on-site, staying in camping accommodation, for a couple of weeks leading up to the festival to help with preparations. During this time they will have spent money in local shops, mainly on camping supplies and stocking up/replenishing camping food and drink. This off-site expenditure is accounted for in the section under event organiser expenditure as it extends beyond the 4.5 days of the festival period (see Section 4.4). In this section we include BTF crew spend on-site over the festival period.

4.2 Gross expenditure of festival attendees

4.2.1 Based on data on trip duration and average spend for each type of attendee group – visitors, artists, media and BTF crew, the total gross expenditure incurred by attendees is calculated to be just over **£14 million**. The vast majority of this expenditure was made on-site (£12.6 million). It is estimated that just under £1.5 million was spent in Winchester as well as neighbouring towns and cities. As highlighted earlier additional expenditure was also incurred by BTF crew many of whom stayed on the estate for a couple of weeks leading up to the festival and their off-site expenditure is included in event organisation expenditure in Section 4.4.

£14.1 million gross expenditure spent by festival attendees

Table 4: All attendee gross visitor expenditure

	Visitors	Artists	Media	BTF crew	All attendees
Gross spend on-site	£11,420,523	£476,891	£38,250	£677,230	£12,612,894
Gross spend off-site	£1,230,511	£263,275	£38,646	See note below	£1,512,632
Total gross visitor spend	£12,651,034	£740,166	£76,896	£677,230	£14,145,326

Note: BTF crew off-site expenditure is recorded under event organiser expenditure in Section 4.4.

4.2.2 The vast majority of the 36,606 visitors arrived early on Thursday and left by midday on Monday. Therefore visitor daily on-site and off-site expenditure is multiplied by 4.5 days. Based on the average spend per person over the festival period, it is calculated that **£12.6 million** was spent by visitors (public ticket holders) during their attendance of the festival of which the greatest proportion was spent on-site (£11.4 million) and £1.2 million was spent elsewhere in Winchester.

Table 5: Visitor gross expenditure

Total number	36,606
Number of days/nights at event	4.5
Average daily spend on site	£69.33
Average daily spend off-site	£7.47
Gross spend on-site	£11,420,523
Gross spend off-site	£1,230,511
Total gross visitor spend	£12,651,034

- 4.2.3 The duration of stay varied with artists with some staying only for one night and others camping on-site for an average of 3 nights. The event organiser paid for the accommodation for 568 artists and their entourage but all will have incurred their own expenses on consumables such as food and drink and transport. Total gross expenditure incurred by artists is approximately £740,000.
- 4.2.4 The vast majority of journalists, photographer, and film crew stayed on-site over the festival period and incurred a gross expenditure of £76,900.
- 4.2.5 BoomTown Fair crew made up of payroll staff, performers, volunteers and other types of staff involved in the running of the festival from Thursday to Monday spent a gross total of £677,230 on-site.

Table 6: Artist, media and BTF crew gross expenditure

	3,817 artists and their entourage:			Media (camping on-site)	BTF crew (camping on-site)
	of which accommodation paid for by event organiser	of which staying in paid accommodation off-site	of which staying on-site camping		
Total number	568	1623	1623	400	5258
Number of days/nights at event	1	1	3	4.5	5
Average daily spend on site	£58.50	£58.50	£71.62	£21.25	£25.76
Average daily spend off-site	£30.36	£90.09	£20.50	£21.47	See note above
Gross spend on-site	£33,228	£94,946	£348,718	£38,250	£677,230
Gross spend off-site	£17,244	£146,216	£99,815	£38,646	See note above
Total gross visitor spend	£50,472	£241,162	£448,532	£76,896	£677,230

4.3 Net economic impact created by attendee expenditure

- 4.3.1 A critical part of the estimation process is to establish what proportion of expenditure is genuinely “additional”, the net value to the host area. The gross attendee expenditure figure is a level of expenditure which is considered to have a wider national benefit given that traders at the event selling food, drink and other items at the event came from all over England. Many event impact evaluations are guilty of only focusing on gross expenditure and therefore substantially over-inflate the true economic benefit of the event for the host area.
- 4.3.2 In order to qualify as genuine economic impact visitor expenditure must:
- originate from outside the area (i.e. be 'new' money); and,
 - not be expatriated from the area ('leakage')¹.
- 4.3.3 Therefore, it is fundamentally important to distinguish **gross** and **net** economic impact. Whilst the gross impact of an event can be considerable, once the two factors above have been factored in the net benefit may be more modest.
- 4.3.4 The first step is then to remove expenditure incurred by Winchester and Hampshire residents. Economic impact studies routinely discard the expenditure of people living locally since this is assumed to be a substitution of their spending which would have occurred elsewhere in the local economy regardless of an event. Local resident expenditure is considered as ‘deadweight’.

¹ There are other ‘weighting down’ factors to consider such as displacement and substitution but these are not considered to be relevant for this particular event.

Derivation of 'eligible visitors'

- 4.3.5 Only 3% of public ticket holders came from Winchester. A further 75 local residents were provided with VIP passes. Including Winchester residents, a significant number of visitors - 5,755 (16%) came from other towns and cities in Hampshire. As we have extended the economic impact to the wider Hampshire area, calculations of the net economic benefit at Hampshire level will exclude the expenditure incurred by Hampshire residents visiting the event.
- 4.3.6 The vast majority of artists and BTF crew came from outside Hampshire so they are all included in the economic impact assessment. The home residence of the 400 media representatives were all based outside Hampshire so too are all included in this assessment.
- 4.3.7 This brings the total number of eligible visitors excluding Winchester residents to 45,971, and the total number of eligible visitors excluding Hampshire residents to 40,326.

Table 7: Derivation of eligible visitors

Number of visitors (public ticket holders)	36,606
Deadweight - Winchester residents	0.003
Deadweight - Hampshire residents	0.16
Main reason factor	100%
<i>Eligible number of visitors</i>	
Excluding Winchester residents	36,496
Excluding Hampshire residents	30,851
<i>Other eligible attendees</i>	
Staff, volunteers, performers, and others employed by event organiser (shortened to 'BoomTown crew')	5,258
Artists and entourage	3,817
Media	400
Total eligible visitors excluding Winchester residents	45,971
Total eligible excluding Hampshire residents	40,326

- 4.3.8 As the number of Winchester residents attending the event is visitors is very small, their exclusion only has a marginal impact on the overall gross figure. The gross impact at Hampshire level will exclude any expenditure incurred by Hampshire residents and with their exclusion, the gross expenditure figure is reduced to **£10.6 million**.

Table 8: Gross on-site and off-site spend among 'eligible visitors'

	Number of attendees	Total gross spend
Gross spend on-site Excluding Winchester residents	36,496	£11,386,261
Gross spend on-site Excluding Hampshire residents	30,851	£9,625,049
Gross spend off-site Excluding Winchester residents	36,496	£1,226,819
Gross spend off-site Excluding Hampshire residents	30,851	£1,037,056
Total gross spend Excluding Winchester residents	36,496	£12,613,080
Total gross spend Excluding Hampshire residents	30,851	£10,662,106

Factoring in 'leakage'

- 4.3.9 The next step is to remove expenditure with traders at the event who came from outside the area. It has already been established that only 9 traders at the event were from Hampshire and of these 4 were Winchester based businesses. This means that 95% of on-site expenditure needs to be excluded as this expenditure will have been expatriated from the local area (leakage). It should however, be noted that one of the conditions placed on food and drink traders at the event by the BTF organiser was that they must source all their produce from named local suppliers. Expenditure incurred by traders with local suppliers is included in this assessment (see Section 4.4).
- 4.3.10 All **off-site** expenditure incurred by BoomTown Fair attendees (i.e. visitors, artists, media, crew) is included in this assessment as this expenditure will have been with businesses located in Winchester. A proportion of off-site expenditure will also have been with businesses such as hotels in neighbouring towns and cities within Hampshire. We appreciate that there will also be a degree of leakage of income from local businesses too. For example, some profits earned by supermarket chains will be transferred to a central pot, most probably where the head office is based and thus will exit the local economy. However, this detailed level of economic activity within business sectors is outside the scope of this study and to our knowledge no previous economic impact study of an music and other large events has considered the wider economic leakage of income earned from visitor expenditure.
- 4.3.11 **With the removal of on-site leakage, the net economic impact generated by visitors in Winchester is calculated to be £1.8 million.** This figure includes the deadweight adjustment of excluding Winchester residents. The economic impact at Hampshire level will also exclude the expenditure of visitors who are normally resident in other parts of Hampshire. Excluding Hampshire residents the net economic impact generated by visitors is calculated to be **£1.5 million**.
- 4.3.12 With the inclusion of the net expenditure of artists, media and BTF crew, the total net on-site and off-site expenditure of festival attendees comes to just under £1.9 million (note this does not include BTF crew off-site expenditure which is recorded separately in Section 4.4).

Table 9: Net expenditure by festival attendees

	Net visitor spend excluding Winchester residents	Net visitor spend excluding Hampshire residents	Net artist spend	Net media spend	Net BTF crew spend
Net on site expenditure ⁽¹⁾	£569,313	£481,252	£23,845	£1,913	£33,862
Total net expenditure ⁽²⁾	£1,796,132	£1,518,309	£287,120	£40,559	£33,862

⁽¹⁾. Net spend removes 95% of on-site spend as income received by non-local traders is expatriated from the area. It includes all off-site expenditure with the exception of BTF crew off-site expenditure. See Section 4.4

⁽²⁾. Total net expenditure includes net on-site expenditure and all off-site expenditure in Winchester and other parts of Hampshire

Table 10: Total net attendee expenditure

	All eligible attendees
Net on site expenditure	£540,872
Total net expenditure	£1,879,850

Note: As a proportion of off-site expenditure particularly among artists and media will have been in neighbouring towns and cities, e.g. on accommodation costs in other parts of the county; the overall assessment is made at Hampshire level.

**£1.9 million net
expenditure spent
by festival attendees**

4.4 Event organisers expenditure

4.4.1 In addition to the expenditures made by the different visitor segments at the festival (visitors, artists, media and crew), significant expenditure is also incurred by the event organiser in the staging of the event and will include aspects such as:

- Safety and security (including police, fire and ambulance services)
- Payments to artists and for performing rights fees
- Siteworks, fencing and trackways
- Rent, rates and licenses
- Toilets, waste disposal, and cleaning
- Signage, traffic and parking, and non permanent structures like screens and tents
- Electrics and power, rented vehicles and fuel
- Ticketing and marketing
- Catering
- Professional services (banking, accountancy, legal services, medical team)
- Payments to payroll staff and non-payroll staff and for stewarding

4.4.2 **As with the visitor expenditure, only event organiser expenditure which is genuinely additional to Winchester and the wider Hampshire area has been included in this assessment.** In order to do this only expenditure on suppliers and contractors based in Hampshire has been included. The calculations are based on detailed information supplied to us by the event organiser. The expenditure data included in this assessment also includes the additional expenditure incurred by contractors on accommodation and food and drink.

4.4.3 Where practically and financially feasible the event organiser used Hampshire based contractors and suppliers to cover aspects such as site works, building materials, security, and waste disposal. Additional expenditure incurred by contractors such as overnight accommodation and food and drink is also included in the figures presented in Table 11.

4.4.4 Based on an analysis of BTF organiser and contractor expenditure, just over **£3.8 million** was spent with Hampshire businesses. This includes over £1 million spent by BTF crew on purchasing food, drink, toiletries, laundry, and transport in Winchester and other parts of Hampshire. Many stayed on-site for several weeks leading up to the event.

Table 11: BTF organiser and contractor net expenditure (within Hampshire)

Infrastructure related costs	£1,838,504
Traffic management	£27,350
Materials for the build	£41,013
Artist accommodation and hospitality	£88,633
Security local personnel	£90,303
Print and stationary	£2,900
Medical team & H&S / Fire	£4,919
BTF crew off-site spend on food/drink etc	£1,706,560
Total	£3,800,182

4.4.5 If we include event organiser expenditure to all the expenditure incurred by all visitors on-site and off-site elsewhere in Winchester and the wider Hampshire area (totalling £14.1 million), the total gross economic impact of BTF 2015 is **£18.2 million**.

4.5 Total net economic benefit of BTF 2015

4.5.1 Once adjustments are made to include only eligible expenditure (remove deadweight and leakage) within Hampshire, **the total net expenditure associated with BoomTown Fair 2015 is almost £5.7 million.** This is made up of just under £1.9 million expenditure by festival attendees and £3.8 million event organiser/contractor expenditure.

Table 12: Total net expenditure associated with BTF 2015

Net organiser and contractor expenditure	£3,800,182
Net festival attendee expenditure	£1,879,850
Total net expenditure associate with BTF 2015	£5,680,032

4.5.2 In addition to the direct economic effects of the event, the spending of visitors and competitors has a range of indirect effects on the local economy - the multiplier effect. Multipliers measure the 'secondary' impacts of the first round of expenditure. For example, every £1 spent in a local area will circulate through the local economy and generate expenditure further downstream with suppliers. To estimate the further economic activity associated with local supplier purchases and additional local income we have used tourism multipliers we have developed for urban, rural and coastal destinations. Including the multiplier, it is estimated that an additional **£1.7 million** was generated within Hampshire.

4.5.3 With the addition of the multiplier effect, the net total economic impact of the event comes to almost **£7.4 million.**

**BTF 2015 generated
£7.4 million (net) for
Hampshire economy
through direct and
multiplier spending**

4.5.4 Given the short-term nature of events additional jobs are unlikely to amount to significant structural change in the local economy. However, by bringing in an additional injection of income to the local economy through visitor spending, particularly when this is a regular feature (i.e. through events run every year), the event helps to 'sustain' the jobs which have been already been created by the normal level of tourism activity for that area. The number of jobs sustained is expressed as Full-Time Equivalent (FTE) position.

4.5.5 To establish the numbers of FTE jobs sustained by visitor expenditure, turnover per job figures have been drawn from our tourism economic impact studies. Based on previous business surveys and case studies carried out by TSE Research, the assumed salary required to support one full-time equivalent job is £60,000. Thus the direct and multiplier/supplier expenditure sustained approximately **123 FTE jobs** in Hampshire.

Contact: research@tourismse.com

Accredited by:



F1:AcousticsCoLtd

PROFILE – Entertainment and Events

Robert Miller - Director

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Introduction and Experience

Robert has 10 years' acoustics consultancy experience and holds a degree in Music, Acoustics and Recording BSc (Hons) from the University of Salford, 2005. He started his career in 2006, employed by RPS as an Assistant Acoustic Consultant and was promoted to Acoustic Consultant in 2008. In 2012 Robert set up F1 Acoustics Co Ltd with Rupert Burton in association with F1 Sound Co Ltd.

Robert has been working in the field of Entertainment and Event sound control since 2008 and has proven experience in: liaison with local licensing authorities; baseline noise assessments; noise management plans; assessments of event feasibility; event sound monitoring and management; and event noise predictions. In this time Robert has provided sound control advice and services to over 75 venues, festivals and events.

Experience

- Glastonbury Festival 2009, 2010, 2011, 2013, 2014 and 2015. Bronze lead.
- Glade Festival 2009. Matherley Bowl, Winchester. Lead consultant.
- Evolution 2009, 2010, 2011, 2012 and 2013. Newcastle upon Tyne. Lead consultant.
- White Air 2009. Brighton. Lead consultant.
- Sanctuary 2010. Catton Hall Estate, Derbyshire. Lead consultant.
- Eurostar Traction 2012. Granary Square, London. Lead Consultant.
- Leeds Festival 2008, 2009, 2011, 2012, 2013, 2014 and 2015.
- BBC Radio 1 Hackney Weekend 2012. Hackney Marshes, London.
- Shakedown Festival 2012 and 2013. Brighton.
- Latitude Festival. Suffolk, 2010.
- Sanctuary 2008. Matherley Bowl, Winchester.
- Hope Weekender 2013 and 2014. Highams Hill Farm, Surrey. Lead consultant.
- Farr Festival 2011, 2013, 2014 and 2015. Newnham, Hertfordshire. Lead consultant.
- High Definition 2014. Eridge Park, Royal Tunbridge Wells. Lead consultant.
- Kendall Calling 2014 and 2015. Lowther Deer Park, Hackthorpe.
- Festival No. 6 2014 and 2015. Port Merion, Wales.
- Masked Ball Summer 2015 and 2016. Porthleven, Cornwall. Lead consultant.
- Forgotten Fields 2015. Eridge Park, Royal Tunbridge Wells. Lead consultant.
- BoomTown Fair 2015. Matherley Bowl, Winchester. Lead consultant.
- Masked Ball Halloween 2015. Flambards, Helston, Cornwall. Lead consultant.
- Alexandra Palace, London:
 - Sigur Ros, 2008.
 - Pigeon Detectives, 2008.
 - Tranz-mission, 2009 and 2010.
 - Jay-Z, 2009.
 - Morrissey, 2009.
 - Lynx All Nighter, 2010.
 - Vampire Weekend, 2010.
 - All Tomorrow's Parties, 2011.
 - The Black Keys, 2011.
 - Smirnoff Exchange Project, 2011.
 - Madness, 2013.
 - Rapha Supercross, 2013.
 - Above and Beyond, 2013.
 - Clean Bandit, 2015.
 - Faithless, 2015.
- Victoria Warehouse, Manchester:
 - Warehouse Project, 2013.
 - Hardwell, 2014.
 - Laidback Luke and Eddie Halliwell, 2014.
 - Super You & Me, 2014.
 - VEVO Halloween, 2014.
 - Nicky Romero presents Protocol Recordings UK Reboot Tour, 2014.
 - S2S Festival New Years Eve, 2014.
 - Cream & Composit Music present Afrojack, 2015.
 - S2S Festival, 2015.
 - Don't Let Daddy Know, 2015.
 - Ricky Hatton 10 Years Celebration, 2015.
 - Sankeys Warehouse Launch Party, 2015.
 - Awakenings, 2016.
- Starworks Warehouse, Wolverhampton:
 - SW presents Example & Karen Harding, 2016.
 - SW presents Tough Love & Redlight, 2016.
 - Sanctuary, 2016.

Qualifications and Memberships

- Music, Acoustics and Recording BSc (Hons), University of Salford.
- Member of the Institute of Acoustics (MIOA).
- Member of the Institute of Acoustics Environmental Noise Group committee (IOA ENG).
- Member of the Institute of Acoustics Young Members committee (IOA YM).
- Certificate of Competence: Environmental Noise Measurement, Institute of Acoustics.
- Sound Insulation Measurements course, Brüel & Kjær.
- Construction Skills Certification Scheme registered.