

**Report by BIC Innovation
to the:**



**Development of a Regional
Events Strategy
May 2007
*Our Ref: B088***

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1. Executive Summary and Mission Statement

- The Events Sector in North Wales is estimated to be worth around £40M pa to the Welsh economy and there are significant opportunities to expand it further to £50M over the next 5 years. In North West Wales the Events Commission contributed in 2005 alone over £3M added value and 70 indirect jobs. The region currently has a competitive advantage that the strategy must capitalise upon.
- This should be achieved by more effective development and collective marketing of events, maximising supply chain efficiencies and integrating events within the regional tourism offer. In future the strategic focus should be all North Wales and cover all aspects of events development, even if specific funding streams apply only to certain geographical areas or types of activity. Further public sector investment is clearly justifiable and the evaluation process developed can give confidence to the public sector.
- In spite of substantial internal management and administrative difficulties, the Events Commission team is well regarded by the events sector and stakeholders. There is strong support for its future development, provided the resource and administrative issues can be addressed.
- The Vision and Mission Statement:

A sustainable and prosperous events industry in North Wales whose economic impact grows from £40M to £50M over the next 5 years. Events in North Wales become an integral part of the tourism and leisure offer, and contributes significantly to raising the awareness and profile of North Wales, to tourism growth, employment and investment, and in particular in extending the season. North Wales gains a Wales and UK wide reputation for its professional events management expertise, effective collaborative support between the public and private sectors and a high quality supply chain for events, acting like a "one-stop-shop. **The** accessible place to bring your event.

- There should be a clear focus, ie hard choices, on supporting and developing larger Key or Hallmark events (or potentially large) events, on extending the season, on much more effective and collaborative marketing. The supply chain requires development and more effective linkages with events organisers.
- Implementation of the events strategy should led by TPNW which provides the natural link to the all Wales events strategy when it emerges in late 2007 and critically to local authorities and other key public and private sector stakeholders. The Events Commission does not have the critical mass or stakeholder support to deliver the strategy. TPNW is ideally placed to integrate events into the wider tourism offer and has marketing capacity and expertise within it currently as a platform for an extended role.
- However, the core strengths and capacity of the existing Events Commission senior must be retained and developed, especially in terms events management and planning, events marketing, technical and legal aspects. Such needs apply to direct assistance and broader requirements for training and mentoring. Without these specialist resources the events sector cannot develop in the future.
- This can be achieved in one of two ways: (i) taking the Events Commission team within TPNW or (ii) forming a company, perhaps limited by guarantee, which is contracted to deliver key events specific aspects of the strategy. The choice depends partly upon the desire of the current senior team themselves to develop more commercially on a wider basis.



2. Background and Aims

- The Events Commission was initiated by the WDA, Tourism Partnership North Wales and the four local authorities of North West Wales (Anglesey, Gwynedd, Conwy and Denbighshire) building upon the clear economic benefits shown by the Gwynedd Events Commission, an earlier Objective One project which was identified as an example of good practice. The Objective One project commenced in January 2005 and is due to be completed in December 2007.
- As well as supporting financially the five nominated events of national importance (Faenol Festival, Llangollen International Eisteddfod, Anglesey Show, Summer Festival of Cricket and Seniors and Challenge Tour - Ryder Cup Wales 2010) the Commission has worked closely with the TPNW and four local authorities who as part of the agreement have nominated additional events to receive funding and assistance from the Events Commission.
- Within the overall Objective One project the Events Commission was tasked with developing a **Regional Events Strategy** and this report reflects the research and consultancy undertaken to achieve this as well as proposals for an **Exit Strategy** for the Events Commission, ie an integrated strategy and vision for sustaining the Commission and developing the events sector across the region post-Objective One.
- The regional strategy and future role of the Events Commission was required to take into account the achievements to date, but also other influencing factors, ie political and other changes locally and nationally that have already occurred and which are expected in the future.
- BIC Innovation, supported by Encompass Consulting, was appointed to undertake this work following a competitive tendering process. In parallel with the Events Strategy Development work a Mid Term Economic Evaluation (Impact Assessment) Study has been undertaken by BIC Innovation. A separate report has been produced for the Economic Evaluation.



3. Approach Taken

- The Regional Events Strategy project consultancy was managed by Dafydd Davies of BIC Innovation and supported by David Reed of Encompass Consulting from start to finish. Jennifer Rao of BIC Innovation led on the face-to-face interviewing with events organisers and stakeholders and the BIC's research team provided desk research resources.
- The consultants worked closely with Brenda Wyn Evans and Dilwyn Morgan at the Events Commission and Dewi Davies of TPNW throughout the key stages of the project including:-

Part 1

- reviewing Events Commission plans and ongoing project documentation
- an extensive desk research analysis programme summarised in the UK Events and Exit Strategy Research – Document issued October 2006
- Face-to-Face Survey with organisers of events supported by Events Commission (excluding 5 Nominated events) – Presentation issued October 2006

Part 2

- planning session with the Events Commission team and Dewi Davies of TPNW (end October)
- development of 1 page outlines to be used as research stimuli in interviewing the major events and key stakeholders:
 - (i) future Events Commission "offer" *Ideas for Developing the Commission* and
 - (ii) *Towards a North Wales Events Strategy*
- In-depth interviews (November 2006 to January 2007) with:
Michael Storrs Music, Anglesey Agricultural Society, Llangollen International Eisteddfod, Ryder Cup 2010
Events Commission, TPNW, Welsh Assembly Government (Regional and Major Events Unit at DCMS), Local Authorities (Gwynedd, Anglesey, Conwy and Denbighshire)

Part 3

- development of initial Events Strategy and Events Commission options summaries for discussion with Events Commission team and management group (Jan – March 2007)
 - completion of final report.
- It should be noted that the Mid Term Evaluation Study, which was undertaken in parallel, had taken priority in early 2007 as it critically required agreement by WEFO and the Welsh Assembly Government (Economic Advisor) to the proposed impact assessment methodology. This is highly relevant to the strategic development and potential future role of the Events Commission as it provides for the first time a solid basis for investment in the events sector across the region.
 - Acknowledgements: the consultants would like to acknowledge the strong support given by Brenda Wyn Evans and Dilwyn Morgan of the Events Commission and Dewi Davies of TPNW, as well as positive contribution of all those event organisers and stakeholders interviewed.



4. The Events Market

- Copies of the full *UK Events and Exit Strategy Research – October 2006* are available from the Events Commission.

4.1 The Wider UK Context

- The events support and management strategies for the individual countries of the UK, through their leading, national bodies (viz. Scotland, North Ireland, England and Wales, plus Ireland) were researched, with additional input from a cross-section of 'regional' agencies. Management structures and support for events was quite diverse with strategies determined by many varying and inconsistent criteria. The full research report details these – what can be clearly stated is that events are being increasingly viewed as drivers for economic development, for profile raising and for community development and participation. The events industry today is viewed as strategically important at all levels from local communities to RDA's and tourist boards to UK government.
- The UK events industry is segmented by the activity of the event under three broad sectors:
 1. Sports
 2. Culture and entertainment
 3. Corporate
- Following desk-top research conducted as part of this project, and supplementary primary telephone research, it can be seen that events management and promotion in the UK falls into four main categories encompassing the above sectors, namely:-
 1. Major, nationally and internationally important, events such as Olympic Games, The Cup Final, etc. mainly in the sports sector – managed at a UK national level primarily between the organisers and national organisations and promoters
 2. Large, nationally and regionally important events, such as Test Matches, The London Marathon, etc. in the sports sector; political annual conferences and large conventions in the corporate sector; large concerts and tours by major artists, and festivals in the entertainment sector – managed at national level drawing national support (such as eventsScotland, visitBritain, Fáilte Ireland, etc.) and major sponsorship, but with regional input from local authorities, tourist boards, marketing agencies, etc.
 3. More localised focus targeted at all but the largest national and international events above, in the main managed by either the marketing/events departments of local tourist boards (eg. Yorkshire Tourist Board, Cumbria Tourist Board, etc.) or tourism-specific agencies/companies (eg. One NorthEast Tourism Team, The Mersey Partnership, South West Tourism) which work in partnership between private and public sectors – the Events Commission is currently one of the latter.
 4. Small, local, events managed at a community level such as village fetes, local sports matches, craft fairs, village dances, etc.



- The research also pointed towards the diversity of various events, their size of operation, the mix between target audiences/spectators against participants/organisers to deliver the maximum local economic impact, and the involvement and input of their various national organisations.
- However, no clear pan-UK standard approach nor strategies was found to manage, promote, finance and evaluate the benefits of events.
- There are, however, certain issues that have been identified that are common across the industry and can be summarised as follows:
 - o Individual events can be highly volatile (ie significant growth or decline), but overall the market mainly static after several years of growth
 - o Emergence of new legislation in event management, licensing & security is making event management increasingly difficult and risky – indeed, it is actually dissuading some organisations from holding events, ie 'Red-tape', a major barrier to growth
 - o Increasing requirements for courses into event management, and certification
 - o Local authorities are, therefore, being increasingly involved as they have this specialist management expertise in-house – the NOEA has even retained the services of a specialist solicitor for the use of their membership to cover this increased need for specialist legal expertise
 - o The emergent legislation is, however, seen by much of the industry as 'skeletal' in essence and that the actual implementation and interpretation of this legislation is left to individual local authorities
 - o The relationship between the event organiser, the local authority and the local tourist board is therefore seen as critical
 - o **'Agencies' that sit between 'public sector' and 'private sector' are not seen – in the opinion of the NOEA and others – to offer much benefit to the industry unless they bring tangible value-added service, advice, skills, etc.**
 - o There is no established formula or matrix model with which to bench-mark or assess the 'economic impact' of events – although visitBritain are currently working on this issue but it is seen to be very much in its 'infancy'.
 - o There are two major exhibitions for the industry:
 - The Showman's Show in Newbury, 18/19th October
 - The Events Show in London, 25/26th January



4.2 Events: Wales

- The 2003 National Events Strategy for Wales consultancy undertaken by Stevens & Associates provides a detailed picture of events within Wales and the key issues which we have outlined below. It made key recommendations to enable Wales to capitalise more fully on the economic and other impacts of events, particularly major events with an international profile.
- However, the core recommendation for establishing a Welsh major events unit has yet to be implemented and as a result the proposals for a strategy have yet to be finalised. As at May 2007 two major events units operate within the National Assembly for Wales within (i) VisitWales within Enterprise Innovation and Networks and (ii) Culture, Welsh Language and Sport. The former is felt likely to place a relatively greater emphasis on the economic impacts of events whilst the latter is focused rather more on community participation, culture and social inclusion. They both support the principles of the Stevens & Associates work including the need to focus on major events.
- In addition, a high level not-for-profit company Ryder Cup Wales 2010 Ltd has been established to deliver the national programme of events leading up to the event itself. Such a not-for-profit company was one of the models proposed by Stevens & Associates for driving major events forward; another was the establishment of single MEU within the Assembly itself.
- Our proposals for the North Wales regional events strategy have had to take into account the current lack of a national strategy whilst preparing the ground for full North Wales participation and implementation in any Welsh strategy in the future.
- North Wales already therefore “punches above its weight” as a region, particularly as regards major sports events.

Summary of the Geographic Distribution of Major events in Wales 2003–2005

	Sport	Culture	Total
North	113 (38%)	28 (25%)	141 (35%)
Mid	40 (13%)	41 (37%)	81 (20%)
South East	120 (40%)	22 (20%)	142 (35%)
South West	25 (9%)	21 (18%)	46 (10%)
Total	298 (100%)	112(100%)	410(100%)

Source: Stevens & Associates 2003





- The **all Wales SWOT** undertaken by Stevens & Associates remains extremely relevant today:

Strengths:	Support of Welsh Assembly Government and other statutory bodies Dynamic and confident Cardiff Growing sense of optimism Strong culture of music and poetry to draw upon Attractive natural environments and landscapes
Weaknesses:	Lack of clarity over event funding and organisation Limitations imposed by existing skills and capabilities Limitations of transport and hotel infrastructure Lack of a major conference facility Risk of a 'dependency culture' created through public funding and absence of strong private sector involvement
Opportunities:	Further development of existing events Submit bids for 'major events' Exploit potential behind new technology Focus on helping consumers develop their interests Maximise the uniqueness of Wales
Threats:	Poor perception of Wales in the wider external environment Deteriorating economic climate risks making funding uncertain Changing structure of sponsorship funding Global insecurity changes travel patterns

- A key dimension of our work in North Wales has been to view events very much as part of the overall tourism and leisure "offer", appealing both to tourists and also the indigenous population.



- VisitWales (previously WTB) has developed a strategic framework for event led tourism which recognises the following broad event groupings:

1 Mega Events

Defined by their scale and their ability to attract and influence large-scale international audiences and generate extensive media coverage. Typically, these events can be held in a variety of different destinations and involve a major effort and cost to attract them to the destination. Eg Ryder Cup.

2 Key Events

Again often peripatetic events, they are not of the same scale or significance as the mega events. However, they can have a major impact on influencing specific market segments or in bringing more limited, but nonetheless important, economic benefits to a more restricted geographical area. These are not 'owned' by the destination and would have to be attracted to the destination, which may involve finance and other logistical support. Generally, they would warrant national level involvement. Eg RAC Rally.

3 Hallmark Events

These are one time or more likely recurring events developed primarily to enhancing awareness/appeal and perhaps profitability of the tourist destination in the short and in the long term. Such events will be unique to the destination and will have been created and developed within the destination. As such they might be based on indigenous cultural values and attitudes. A 'hallmark' event will signify a recurring event which possesses such significance in terms of the tradition, attractiveness or image that the event provides the destination with a competitive advantage. Examples in Wales would be the Hay Festival, Llangollen International Eisteddfod and Cardiff Singer of the World and Artes Mundi (World International Artist of the Human Form).

4 Regional/Local Events

These can be one-off or periodic events, of medium or low tourism demand and/or medium to low value in terms of media coverage or image enhancement. However, they can have value in terms of their ability to enhance the holiday experience and to encourage longer stays in a destination. Sustainability is also a factor in determining their value.

Regional or local events with long-term community support, financial self-sufficiency and those that are environmentally 'green' will have more strategic significance. Almost all of these events have tourism and community value but few, if any, will be capable of generating major tourism demand.



- VisitWales (WTB's) role in relation to these 4 event groups is outlined below:

1 Mega Events

- Coordination and, where appropriate, leadership of the bidding process.
- Evaluation of the potential and appropriateness of candidate events.
- Identification of financial support requirements. (It should be noted that it is unlikely that the core VisitWales (WTB) budget will support these mega events. Additional funding will need to be secured if the event is seen to be desirable).
- Coordination of activity to leverage benefits from the events.

2 Key Events

- Where appropriate, coordination and/or leadership of the bidding process.
- Support resources and services for other organisations leading the bidding process.
- Provision of advice and marketing collateral for those leading the bidding process.
- Financial support to attract events.
- Support and/or coordination of activity to leverage benefits from the events.

3 Hallmark Events

- Financial support for others involved in the development/creation of events based on selection criteria. The aim must be to achieve self-sufficiency over a period of time.
- Advice/guidance on maximising the benefits of the events.
- Assistance in the promotion of events, through WTB communication.
- Trade and press visits to events.

4 Regional/Local Events

- Promotion through VisitWales (WTB) communications.
- Trade and press visits.
- General advice and guidance.
- Indirect financial support via the Regional Development Fund funding decisions taken by Regional Tourism Partnerships.

The Welsh Assembly Government encompassing DEIN (VisitWales) and Dept of Culture, Welsh Language and Sport, in partnership with Arts Council Wales, WLGA and the Sports Council for Wales, is aiming to develop a major events strategy for Wales and we would expect this to be in place by the end of 2007 latest.



- However, in common with the rest of the UK and Ireland, there is no common strategy across the country for events management, support and promotion. Research has shown that, although there is some over-reaching national practices (if not a formal strategy *per se* strategy -see above), when it comes to implementation, this tends to occur, in the main, at regional tourism partnership level, although this in itself is not consistent, for example:

Capital Regional Tourism

Involvement with events is threefold:

- (i) Maintaining a database of events for the region
- (ii) Maintaining a network of events and suppliers.
- (iii) Providing limited financial support for the marketing of events which match their strategic objectives.'

Their only detailed information on outcomes is from the last area of work

Mid Wales Tourism Partnership

Do not have detailed information on events, but rather refer to Visit Wales (the old WTB) or Mid Wales Tourism (agency).

The only support offered is financial, and these tend to be restricted to community events

Tourism Partnership South & West Wales

Although originally driven by an initiative entitled "Wild Out West", this is now somewhat in abeyance but with local authorities (eg. Pembrokeshire CC) are now re-visiting the events sector and a development project is in progress currently



4.3 Events: North Wales

- Tourism Partnership North Wales (TPNW) has invested in updating its www.north-wales-events.co.uk website to attempt to capture as many events as possible from across the region although many commercially organised events at key venues and theatres do not appear to feature. The VisitWales portal has a similar weakness.
- Whilst it is therefore difficult to quantify the precise numbers of events we would estimate that there are 600-800 events per annum across the North Wales region.
- Based upon the evaluation of only 16 medium to large events in North West Wales supported via the Events Commission in 2005, which were estimated to have an Economic Impact to Wales of £14.4M, **it is quite reasonable to estimate that the Welsh Economic Impact of events as a whole in North Wales to be in the region of £40M per annum.** Events are therefore already big business!
- Using the categorisation of events employed all Wales we have attempted to profile known events to provide a reasonable overview. There will always be a debate about when a Regional/Local Event becomes Hallmark, ie status and size within its target audience.

1 Mega Events - None

2 Key Events

National Eisteddfod	Urdd Eisteddfod	Ryder Cup Seniors
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3. Hallmark Events

Faenol Festival	Anglesey Show	Llangollen International Eisteddfod
Festival of Cricket	Children in Need	N Wales International Music Festival
Cadet World Championships		

4. Regional/Local Events

Kitejam	Abersoch Jazz	Llandudno Victorian Extravaganza
Wakestock	Bluegrass	N Wales Spring Garden Festival
Woodfest	Conwy Feast	Anglesey Oyster Festival
Sesiwn Fawr	Fun in the Sun	Snowdon Marathon
Snowdon Race	Anglesey Marathon	Denbigh Show
Llangollen Jazz	Wrexham Science Festival	Big Buzz

An increasing number of sports events: golf, watersports, extreme, walking

Regular events and venues incl:-

- National Trust (Penrhyn Castle, Erddig, Chirk Castle, Plas Newydd), events and exhibitions
- Bodelwyddan Castle: key events plus regular speciality events, eg VW club etc
- Theatres: Venue Cymru, Pavilion, Clwyd, Stiwt, Galeri with major music & theatre artists
- Trac Mon (Ty Croes): motor club racing most weekends throughout the year
- Railways: eg regular Welsh Highland Railway events
- Local agricultural shows and eisteddfodau
- Local festivals and fairs, eg Beaumaris, Criccieth, Menai Bridge
- Events at Arts venues: eg Ucheldre, Oriol Mostyn, Oriol Mon, Llangollen Pavilion
- Parks: Glynllifon, Loggerheads, Anglesey Showground, Bangor-on-Dee

- The challenge in North Wales therefore may not be developing more events; rather to get the correct balance between supporting regional/local events and those which are Hallmark events, or could become Hallmark events in the future, and enhancing local economic benefits.





Organisation and Support of Events in North Wales

- The role and performance of the Events Commission is analysed in more detail section 5 below and we are seeking to here to describe the wider context of the organisation and support for events including that of the Events Commission. The stakeholders in the events sector include:-

Events Commission:	Hosted by Gwynedd and facilitated by TPNW, NW Wales only, management group from local authorities, sector, TPNW, Welsh Assembly, and chaired by Prof Mike Scott NEWI Funding for nominated events, expert advice and assistance
Welsh Assembly:	Directly funds some events via applications to DEIN (VisitWales) and CWLS departments
TPNW:	Drives the development and marketing of the overall regional tourism branding offer to key markets (incl NW England), wide ranging public and private sector partnership, regional voice to/from Visit Wales Some direct financial assistance to events, more in NE Wales, no events strategy or remit currently contracts key marketing activities to agencies/providers eg North Wales Tourism and manages area marketing partnerships
Local Authorities:	None interviewed had an events strategy or even policy framework but several were working towards this, tended therefore to be <i>ad hoc</i> Most gave small levels of funding to events, often based on historical support or direct personal contacts, recognised as unsatisfactory Several local authorities, or enterprise agencies allied to them, directly develop and manage local events themselves
North Wales Events Group:	Small group of events organisers (mix of private and public sector) have formed NWEAG to jointly promote events and explore operational opportunities, eg collaborative purchasing/sharing of resources.
Local associations/groups:	Chambers of Commerce, Tourism Associations (eg Llandudno Hoteliers Assoc) and a variety of groups and associations often organise events working with their volunteers. Indeed many (perhaps most) local events would not take place without the passion and enthusiasm of volunteers and often part-time events organisers.
Venues:	largely focused on own venue and events except where offering external ticketing eg Venue Cymru for Faenol Festival

- The events sector in North Wales is therefore characterised by a relatively few Hallmark and Key events alongside 20-30 recognisable events with varying degrees of potential for future development and growth. There has been particular growth in recent years in outdoor sports events reflecting the increasing profile of North Wales for activity breaks. In summary, the Events Sector in North Wales is estimated to be worth £40M to Wales and offers wide ranging products, but currently lacks cohesion and a vision for the Events Sector that complements the wider North Wales Tourism and Leisure offer.



5. Events Commission: Evaluation of its Contribution

- This section summarises the role that the Events Commission has been playing to support the events sector in North West Wales and an analysis of its contribution to date.

5.1 Remit

- The Events Commission was established to undertake certain key tasks namely:-
 - ⇒ Administer funding (£30,000 pa) and associated advice and support to each of the 5 nominated major events, ie Faenol Festival, Anglesey Agricultural Show, Llangollen International Eisteddfod, Summer Festival of Cricket and the Seniors and Challenge Tour of Ryder Cup Wales 2010.
 - ⇒ Administer funding and associated advice and support to 2 (or more) events nominated by the 4 local authorities.
 - ⇒ Create and develop an annual events conference in partnership with the national Outdoor Events Association (NOEA)
 - ⇒ To provide advice and assistance to events organisers in the areas of:-
 - health & safety and other technical assistance
 - business development
 - marketing
 - ⇒ Work with partners to attract events into the region
 - ⇒ Develop a regional events strategy.

Management and Administration Issues

- The financial support for events also included substantial duties to monitor claims and outputs from each event that has been financially supported, and collating the information including economic impact assessments as part of Events Commission claims and outputs to WEFO. Each event put forward a development plan each year for approval by the Events Commission management group. Over the last two years more events have been supported financially (ie less to each on average) which has multiplied the administrative burdens, ie each event monitored takes more or less the same effort. The cause of this was partly down to the local authorities themselves lacking their own funding but also their own events strategies and structures for prioritising and evaluating events applications.
- In 2006 WEFO changed its reporting requirements to include the need for submitting copies of actual invoices from all financially supported events along with the claim forms. It is important to note that this caused considerable difficulty and increased administrative burdens both to the Events Commission team and events organisers, especially since it was retrospective. Furthermore, the method used for measuring impact assessment was found to be unworkable (and wrong) causing further pressures on staff with targets of indirect jobs to be created of 62 over the period of the three year programme.
- During early 2006 the Chief Executive Hugh Edwin Jones went on long term sick leave at that time of this administrative upheaval and has since transferred to an events position with Cyngor Gwynedd. Brenda Wyn Evans (Manager) acted up for much of 2006, supported by Dilwyn Morgan. Only in late 2006 were the Events Commission team up to near full strength, representing a critical period of several months seeking to address the administrative issues as well as delivering support and advice to events organisers. This is described to provide context to the feedback from events organisers obtained in late 2006.



5.2 Feedback on the Events Commission from Events Organisers and Stakeholders

- The evaluation research was undertaken in two stages as described in Section 3 above. There was an initial phase of interviewing organisers at the smaller regional and local events, followed by interviews with organisers of the larger events and key public sector stakeholders (and included the use of stimuli). Feedback from each of these three subsets has been analysed separately.

5.2.1 Regional/Local Event Managers feedback

- Their **general feedback** included:-
 - Many events were only a few years old, one or two were 20 years old or more. Planning is usually a 9-12 month cycle.
 - Aims cited included attracting local people as well as bringing visitors to North Wales and making them aware of the region.
 - Most events had business plans although there were strong suggestions that these were primarily used to obtain funding rather than planning and managing the event, often reflecting the fact that even well established events were often run by only 1-2 people plus volunteers. Few events could be actually considered profitable in normal commercial terms and concerns were often focused on short term funding even though many events were longstanding!
 - Organisers used a mixture of marketing activities to attract attendees: leaflets, posters and banners, websites, PR, press (often specialist and local), radio or TV advertising. Word of mouth was often cited as being particularly effective.
 - Extensive use of local or Welsh suppliers usually amongst these smaller events, with general approval, however one or two organisers felt there were room for improvement
 - Organisers were asked about the SWOT for their own events. Common themes emerging included:-
 - Strengths:** *brings money to area, brings talent (acts) in, community involvement*
 - Weaknesses:** *lack of communication with LA, weather, small venues, lack of profitability*
 - Opportunities:** *be more commercial, add new activities to event, showcase N Wales as region for events*
 - Threats:** *funding, securing sponsorship*
 - Most events organisers felt their event had the potential to develop. Key constraints often mentioned were venue size, parking issues and the lack of accommodation.
 - Evaluation: some events did undertake formal visitor surveys whereas others used word of mouth.
 - Overall, therefore whilst the events organisers have often been successful in developing and running their events the sector as a whole is characterised by passion and determination rather than commercial skills and a sound financial footing. There is clearly some financial dependency on the public sector.



5.2.1 Regional/Local Event Managers feedback continued

- Their specific feedback on the Events Commission itself:-
 - Remit: responses focused on funding and reference to advice and support but general lack of clarity about the remit of the Events Commission, limited awareness.
 - Assistance: apart from financial assistance there were one or two mentions of other assistance such as attendance on courses, telephone advice and with preparation of posters and banners.
 - Level of support received: praise for the front line people involved (Brenda Wyn Evans and Dilwyn Morgan), for their enthusiasm and commitment, professionalism and support. On the negative side there were real questions about the resources (ie capacity) available and therefore quality of service. What else could the Events Commission offer apart from funding?

Regional/Local Events

<p>Strengths Personnel – very helpful, open Support available: help, information, advice and money Stepping stone to getting a North Wales events strategy Raised the profile of the region</p>	<p>Opportunities Networking within the events industry Grow and strengthen links between events organisers Developing an events strategy Develop a network of local suppliers and contractors Develop new events in North Wales Target and support smaller events</p>
<p>Weaknesses Lack of staff Too small an organisation, lack of structure Lack of attendance at supported events Lack of communication with the events sector, events managers and local authorities Did not communicate what services were available</p>	<p>Threats Funding !!! Lack of Assembly support for N Wales Possible criticism if support the wrong events With too few personnel it could collapse It has too wide a remit to deliver it efficiently</p>

- The actual impact and added value of the Events Commission and the funding was stated by the overwhelming majority of those interviewed as being **significant**. The Events Commission "added value" averaged out at over 18% of the total economic impact across the respondents' events.
- **Furthermore, over 80% stated they would use the Events Commission again!**
- In terms of **Future Ideal Support** from the Events Commission the wish list of these Regional/Local events organisers included:-

<p><i>More admin support (experienced staff)</i> <i>A mentoring scheme</i> <i>Help managing local community and LA</i> <i>Std evaluation visitor survey</i></p>	<p><i>List of approved suppliers</i> <i>More money</i> <i>Doc: what need to know when running an event</i> <i>Business plan preparation assistance</i></p>
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- **Their needs for training and coaching were identified, including technical and legal aspects, and organising seminars as well as the mentoring mentioned above.**





5.2.2 Hallmark Event Managers feedback

- Four of the five major event organisers were interviewed, the exception being Colwyn Bay Cricket Club (Summer Festival of Cricket). 2 of these events the Llangollen International Eisteddfod and Anglesey Agricultural Show are longstanding (60 years and 136 years old respectively) whilst the Faenol Festival was only established in 2000 and has developed steadily into a Hallmark event with the aim of developing further. The Ryder Cup Wales 2010 is a 9 year programme of activities including regional Seniors and Challenge Tour events to develop an all Wales and inclusive golf legacy within Wales following the Ryder Cup proper in 2010 and indeed through to 2014.
- In contrast to the smaller events these were characterised by:-
 - core full time commercial teams with substantial major events experience, often international
 - additional expertise is contracted out as required: project management, marketing, technical, stage management ... and yet volunteers still play key roles
 - all had retained their original sense of purpose as a driver for their event alongside professional event management expertise
 - tended to be much more outward looking, aware of industry developments and external competition and more ready to learn from (or copy) others
 - much stronger planning and project management processes
 - recognition of vital importance of effective event evaluation and impact assessment.
- Therefore whilst the funding (£30,000 each) from the Events Commission was the same the needs of the four events/organisations were quite distinct.
 - ⇒ Anglesey Agricultural Show: as well as supporting the show development, the organisers were seeking to develop the showground as a regional events venue
 - ⇒ Ryder Cup 2010: core support to develop prestige new regional competitions (Seniors and Challenge Tour) in North Wales with profile raising TV coverage
 - ⇒ Faenol Festival: further development and marketing of the festival
 - ⇒ Llangollen International Eisteddfod: technical assistance and marketing development.

Economic Impact (Added Value) of the Events Commission

- Overall added value from the Events Commission ranged from 0% to 100% (**36% on average**), which can be explained by precise added value and indeed in one case leading to events that would not have taken place at all in North Wales without Events commission assistance. Even the 0% only reflects the lack of immediate impacts from Events Commission-funded work which should secure future events (and therefore impacts) but which cannot be measured or even estimated at present.
- Taken together, the Events Commission had a significant impact on the major events supported.



5.2.2 Hallmark Event Managers feedback continued

- Their specific feedback on the Events Commission itself included:-
 - Remit: they had a clear understanding of the advice and support available alongside the funding and as key events were in fairly regular contact with the Events Commission.
 - Assistance given had varied:
 - “helped us to increase our catering income”
 - “certainly valuable for new events or developments”
 - marketing advice
 - health and safety issues
 - “support on the ground to support developments”
 - “helped us find someone to aid our marketing”.
 - Once more, the staff were generally praised for their quality, helpfulness and for attending events but there were again questions about the resources available currently.

Major Events

<p>Strengths Very personable staff, some strong Efficient and effective support Knowledge of events and suppliers if needed Knowledge of suppliers Funding</p>	<p>Opportunities Supply chain development Networking between the major events Become the Events Commission for Wales, ie support events throughout Wales To promote the North Wales Events Group Could do far more if more people</p>
<p>Weaknesses Loss of Hugh Edwin Staffing not sufficient Suffer from Local Authority in-fighting WEFO Programme – relatively short window of time to build an organisation Need closer contact and relationships with organisers Need to offer more services and increase awareness Don't like the name – should be North Wales Events</p>	<p>Threats Events stop coming to N Wales Funding ends Further loss of quality, experienced personnel Disappears or is replaced</p>

- The SWOT is similar in many ways to that of the Regional/Local Events organisers except that it reflects their greater direct involvement with the Events Commission team and wider understanding of strategic and political issues.
- And they too felt the Events Commission could help with networking, sharing expertise and supply chain development.





5.2.2 Hallmark Event Managers feedback continued

- o Specific suggestions for future development of the Events Commission included:-

Marketing

- encouraging cross promotion and joint marketing (generally warmly welcomed), which could take various forms, eg between two non-competing events sharing databases,
- adding links on each others' websites
or more broader joint event marketing out of area perhaps working with the North Wales Events Group
- offering online ticketing services via the Events Commission was welcomed by one event organiser, the others more likely to develop their own arrangements

Training & Consultancy

- limited interest in training, workshops (apart from H&S or legal aspects) in comparison with smaller event organisers who had greater identified needs
- however there could well be interest in training amongst the supply chain to the major events separately
- some demand for consultancy and *ad hoc* project assistance.

Procurement/Supply Chain

- felt there was a need for a "mini White Book" ie directory of expertise and resources
- concern that should be audited, ie up to standards required of major events (were doubts)

Note: the invoice analyses undertaken for the economic evaluation (ie details of expenditure by category for all supported events) provides an excellent source of information for the Events Commission and events sector in general in identifying supply chain opportunities. This would not compromise any data protection or confidentiality issues as suppliers and events could be anonymised.

Planning, Development and Evaluation

- whilst support in principle to the Events Commission offering a wider range of services there were real concerns about current capacity and the experience to offer some of these
 - diaries: vital role to co-ordinate diaries to avoid duplication
 - providing market intelligence was viewed as important by two events
 - undertaking visitor surveys and evaluations on behalf of events was strongly supported
 - development: ie new activities, offers, being able to offer this would be seen extremely positively and would likely to be used provided the Events Commission could deliver
- The major events managers also provided more strategic feedback regarding development of a regional events strategy which is discussed in Section 6.



5.2.3 Stakeholder feedback on the Events Commission

- Confidential discussions were held individually with representatives of the four local authorities, TPNW, Welsh Assembly Government (regionally and at the Major Events Units of the Dept of CWLS) as well as with the senior Events Commission staff. These discussions followed a similar structure to those with the major events managers although the feedback was naturally much more from the political and strategic support perspective. Indeed, these very differences are the reason for presenting three separate SWOT's for the Events Commission.

Stakeholders

<p>Strengths An identified body, it <u>exists</u> Brought the partners together Added value Fair broker and assists all 6 major events Good knowledge, regional expert on events Willingness, approachable Financial funding available currently TPNW and Gwynedd strategic, management and political support, Prof Mike Scott is independent</p>	<p>Opportunities New convergence funding (regional), pulling the partners together again, part of Welsh strategy Work more with events organisers Champion the sector's development regionally TPNW – new partnering potential Roll out its skills: North Wales, even into the North West (commercial consultancy) Merger or collaboration with another associated organisation eg Attractions, North Wales Tourism, Venue Cymru, vertical eg web business or NWEG Events co-ordination and evaluation support for Local Authorities Develop close links with overall tourism promotion Turn into a not-for-profit company</p>
<p>Weaknesses Young organisation Loss of the Chief Executive Internal conflicts between local authorities Lack of skills: technical and especially internal management WEFO – amount of bureaucracy Lack of capacity – is it too small? Reactive and not pro-active Low morale Initial project set-up poor</p>	<p>Threats Funding dries up – no commitment from stakeholders Financial re-claim from WEFO Low yield of events sector (financial return/profit) Local authorities developing own events units Low local population base in region for major events</p>

- The SWOT needs to be considered in the context of real fragmentation currently within local authorities, TPNW and even the Welsh Assembly. None of the local authorities interviewed nor the Assembly controlled their own internal events centrally quite apart from taking a structured approach to supporting external events.
- The stakeholders present a clear picture of an organisation in potential difficulty fighting for its existence. Marshalling political and funding support from the stakeholders for getting the Events Commission fully on track is a big ask, but at the time of these discussions the stakeholders were not aware of the latest economic impacts analyses demonstrating the strong case for further investment in the Events Commission and the events sector as a whole.





5.2.3 Stakeholder feedback on the Events Commission

- A number of suggestions were made by the stakeholders for future development of the Events Commission including a desire for it to be the champion and driver of development of the regional events sector, although this was generally not seen as credible currently given the limited resources. Other specific comments made included:-

Marketing

- widely welcomed as being important for the region and not being done presently
- encouraging cross promotion and joint marketing, not only within the events sector but also with Attractions, portals and broader tourism marketing outside of the area.
- offering online ticketing services seen as potentially valuable by one or two.
- better marketing and communication with stakeholders

Training & Consultancy

- support for increased training involvement, perhaps linked to an ESF application
- may be partnership opportunities with TTFW and local colleges
- could even be wider all Wales project or even Wales/Ireland (Interreg)
- though recognition that no capacity at Events Commission currently

Procurement/Supply Chain

- once again was demand for a “mini White Book” ie directory of expertise and resources
- also including venues as well as events
- possible to benchmark/audit providers, perhaps via NOEA
- working with the Local Supplier Development Programme, as an honest broker

Planning, Development and Evaluation

- felt to be the most important area by one or two stakeholders as the way to champion development of the sector
 - should be the experts in events development, research and evaluation (and not just providing assistance)
..... however the real concerns about the Event Commission's current capacity and levels of in-house expertise
 - in discussions with one stakeholder the idea of the Events Commission training up selected DEIN accredited business advisers was discussed. Ie if general business advisers were trained in specific aspects of events management and the events business they could then apply their wider business skills to assist events under existing business support programmes.
- Taken together, the stakeholders are fully aware of many of the needs of the events industry (as well as their own internal requirements) and ideally would support the Events Commission in a wider role if able to deliver.
 - Bridging this reality gap, and indeed filling the untapped economic potential of the sector, can only be explored and addressed within the context of the regional events strategy development.



6. Proposed North Wales Regional Events Strategy

- Prior to presenting the proposed events strategy it is important to set out key issues that were considered by ourselves, by Events Commission senior staff and the key stakeholders as well as organisers at the major events. The initial strategy research provided further insights into the issues as has the accompanying economic impact assessment work.

6.1 Key Issues Considered

6.1.1 *Why have a Regional Events Strategy?*

- Quite apart from the specific requirements for the Events Commission to develop one it is clear from the evidence gathered that the argument for a regional events strategy is compelling:-
 - events are now established as a result of the impact assessment work as an important economic activity in North Wales, estimated at £40M per annum
 - the Events Commission is generating **added value economic impacts** of approximately £3M pa to the events sector in North West Wales, excellent value for public sector funds
 - North West Wales (and arguably all North Wales) currently have competitive market advantage from the establishment of the Events Commission and relative commitment to events, ie an opportunity to capitalise on this further versus other regions who are now themselves increasing looking at events strategically (RDA's, Local Authorities and VisitBritain)
 - the Events Commission has a limited remit focused on selected events funding and expert advice and assistance and the positive outputs achieved are still well below the identified needs and aspirations of the events sector and stakeholders, and currently only covers NW Wales
 - the North Wales Events Group (private sector organisers) have formed to develop supply chains
 - significant events support and activities are still undertaken in an *ad hoc* manner across many organisations such as local authorities, TPNW and the Assembly and there is real opportunity to operate smarter, ensure better public sector investment and tap into European funding collaboratively (provided stakeholders can work together effectively)
 - the events sector across the UK is becoming increasingly professional, technical, commercial and innovative and North Wales with its relatively small population and modest infrastructure needs to be ahead of the game to secure mobile events
 - events individually and collectively can significantly raise the awareness and profiles of regions
 - events can be drivers not only for economic impact but also community participation and inclusion in arts, sports and entertainment

6.1.2 *Impacts of Events and the Events Strategy*

- Most respondents felt that measurable economic impact should be the prime driver to justify the necessary public investment in the events sector, with funding for individual events often premised by requirements to be financially sustainable longer term. One or two did state that in many cases events would never be fully self-sustaining financially and that it was unrealistic to expect them to be such. They felt able to justify continued public investment as generating tangible economic impact returns as well as other benefits listed below, especially where events were developing and not simply standing still, expecting "hand outs". These additional less tangible impacts for the Events Strategy included:-
 - raising the profile of the region as a destination (ie North Wales brand awareness)
 - increased community participation, eg arts & sports including addressing social inclusion issues
 - reflects the Assembly Dept of CWLS assessment criteria for major events and the balance scorecard suggested in the UK Events & Exit Strategy Research – October 2006 p5



6.1.3 *Events – the wider context*

- The research has clearly shown that the **Events Sector requires event-specific expertise** in events management and planning, marketing and sponsorship, and a wide range of technical, staging, health & safety and legal aspects, MR and evaluation. These areas of expertise must be developed within the region's sector and supply chain and through access to professional support *a la* Events Commission.
- Nevertheless, there was considerable agreement that whilst events and the events sector must be nurtured and developed for maximum economic impact in their own right events should be considered an integral part of the wider regional tourism and leisure offer:-
 - Event visitor expenditure and impacts are generally greater outside the event itself, ie more spent on accommodation, food and drink, but also shopping and visiting local attractions during the visit
 - Events a strategic marketing tool to increase penetration, a means to “refresh” the tourism offer
 - Several events organisers were critical of the lack of quality accommodation which sometimes seriously limited growth of the events, ie need for overall offer investment planning beyond events
 - Lack of infrastructure cited, versus major cities, with venues often too small
 - Attractions themselves were often running events, ie events work!
 - Clear opportunities for cross promotion between events and attractions & destinations, accommodation and food & drink offers, occurs only a to limited degree currently
 - A top North Wales tourism priority is extension of the season, particularly the shoulder months of March/April and September/October and arguably this should apply to events as well, as North Wales is relatively “full” in July and August.
- Integrating events planning and support and events marketing into the wider North Wales tourism product and its marketing offers real opportunities for synergies and effective public investment. To maximise impacts though the core events sector expertise and focus has to be retained.

6.1.4 *North Wales profile*

- With a modest population of around 750,000 North Wales welcomes 15-20M day visitors each year and 11M people live within 2 hours driving of Llandudno. Whilst North Wales accounts for only 1.25% of the UK population it represents 5% of UK tourism. In addition to the Wales brand values of *Human, Real, Magical* North Wales also offers the *Dramatic*. North Wales can be differentiated by the scenery, heritage, arts and culture and increasingly also by the substantial growth of activity, sports and leisure tourism. The outdoors, mountains and the coast are fast translating speciality sports into profitable tourism businesses and new events are following closely behind with real synergies emerging that place North Wales as a key UK region for many activities whether “extreme” or more sedate. This trend is particularly strong in North West Wales. In the North East (Denbighshire) arts and culture were relatively more important, citing the potential of Llangollen as international culture event brand.
- The consultations explored where the **focus for future investment** should be on given the need to prioritise what will always be limited budgets:-

(i) Sports/activities events versus arts, heritage and entertainment events

General support regionally for sports/activity focus, though certainly not exclusively

(ii) Key/Hallmark Events versus Local/Community Events

Agreement to focus resources **primarily on Key/Hallmark** events for maximum economic impact, as well as those with smaller events real potential to develop into future Key/Hallmark events. Support via local authorities for local events.



6.2 Strategy Proposals

6.2.1 The Vision

A sustainable and prosperous events industry in North Wales whose economic impact grows from £40M to £50M over the next 5 years.

Events in North Wales become an integral part of the tourism and leisure offer, and contributes significantly to raising the awareness and profile of North Wales, to tourism growth, employment and investment, and in particular in extending the season.

North Wales gains a Wales and UK wide reputation for its professional events management expertise, effective collaborative support between the public and private sectors and a high quality supply chain for events, acting like a “one-stop-shop. **The** accessible place to bring your event.

- **The events celebrate the excellence of the superb environment and takes pride in our culture, heritage and people.**

6.2.2 The Strategies

The stakeholders in the public sector, events sector and tourism and leisure industry in North Wales will need to work together to:-

- **Build a sustainable future for events and the events industry**
 - by ensuring expertise, in-depth support, training and funding is available and that events managers are increasingly professional to events industry standards
 - focused on events delivering growing economic impacts and added value
 - supported by a vibrant and efficient events supply chain
 - working much more closely with the venues across the region
 - integrating events into the wider tourism offer
 - maintaining an excellent knowledge base about the competitive advantages of North Wales as a destination for events overall and within key events activities and sectors
 - ensuring strong linkages with Welsh Assembly and become a key delivery mechanism for the Welsh Events Strategy
- **Clearly demonstrate excellent value for money in further collaborative public and private sector investments to develop the events industry**
 - by developing and implementing further the impact assessment model linked to quality evaluation information as a means for monitoring the performance of events individually and any Events Commission programme MKII
 - by increasing the financial performance of events through improved marketing, operational efficiencies and planning with decreasing dependence upon core public funding
 - by maximising supply chain development opportunities working with the North Wales Events Group and Local Supplier Development Programme
 - demonstrating that the events sector management with its stakeholders are fully capable of running EU funded programmes, whether convergence or Interreg



6.2.2 The Strategies continued

- **Ensure the key priority is economic impact, although a balanced scorecard should be used to measure community, cultural and other benefits**
 - utilisation of the economic impact model by all stakeholders and events organisers, from the process of planning and assessing funding applications through to measuring post-event impacts, in a consistent, open and transparent manner, alongside qualitative scoring of other aspects including sustainability, profile raising, tourism offer synergies, community and cultural benefits
 - that the impact model and balanced scorecard is adopted by the local authorities and the TPNW as a common framework for evaluating event funding and ideally the Assembly as well as part of its all Wales Events Strategy

- **Focus regional resources firmly on KEY EVENTS and HALLMARK EVENTS and not on LOCAL/COMMUNITY EVENTS, except where the smaller events have the potential and capability to become key or hallmark events in the future**
 - the strategy must make hard choices and clearly prioritise resources at the regional level, and may involve commitments for several years subject to annual deliverables
 - it must provide the incentives for smaller events to develop but set against clearly stated criteria and objectives, including capabilities of events managers; North Wales does need dynamic events coming through and challenging the major events
 - this could include new integrated event and tourism development propositions with attractions, venues (eg Trac Mon) or locations (eg Llangollen) ... but subject to the same economic impact evaluation criteria
 - the current major events should be funded primarily for growth and development, but with some recognition for wider profile raising as well as tourism economic impacts

- **Exploit the accessibility of the region and especially its sports and outdoor activities, as well as culture, heritage and entertainment**
 - capitalise on the target populations within 2 hours driving of Llandudno and Wrexham (11M and 18M respectively)
 - develop closer links with sports and outdoor activity associations and tourism businesses, with the Sports Council for Wales and exploring Key Event opportunities such as the Island Games, Ryder Cup and Olympic Games
 - whilst culture, heritage and entertainment will be a lower priority to sports and outdoor activities they will nevertheless be important, especially in developing existing major and established events, maximising opportunities with venues and the wider tourism offer to increase overall economic impacts
 - quality market intelligence could inform key trends and developments within specific activity areas and in developing event proposals and ensuring existing events maintain their competitiveness, especially against external competitors



6.2.2 The Strategies continued

- **Promote events and venues more effectively in their own rights and as a key part of the overall tourism offer**
 - diary co-ordination to avoid duplications and conflicts, especially within genre
 - encourage cross-promotion between events (and between venues), especially where non-competing and where extensive databases have been developed
 - develop an outstanding and extensive North Wales events and venues portal, linked to the wider tourism offer incl accommodation, marketed aggressively outside the region
 - **external** joint event marketing, ie building markets, a higher priority than marketing within the region which will be simply taking market share
 - particular emphasis on budgeting joint event marketing at the shoulders of the season to maximise new expenditure gains (March/April and Sept/Oct)
 - attendance and promotion of the North Wales events sector at key UK events industry exhibitions and media (eg Showmans Show) including preparation of a North Wales "mini White Book" and wider tourism offer contacts
 - marketing has until now been largely outside the remit and expertise of the Events Commission team whereas TPNW are already managing regional marketing activities

- **Develop the skills and professionalism of people and businesses working in the events sector**
 - mentoring and training in various technical and commercial aspects of events have been confirmed by the research as required by organisers of the smaller events in particular, but who will often be lacking funding, time and motivation and yet without the skills and assistance will find it difficult to sustain and grow their events
 - without addressing the issue of skills and professionalism (and indeed risk and legal aspects) the sector as a whole cannot properly develop and compete in North Wales
 - opportunities exist to establish events specific training resources to serve not only the North Wales events sector but also further afield given the common issues across the industry, perhaps the development of UK vocational qualifications with partners
 - synergies should be explored with training programmes within tourism, eg the Tourism Training forum for Wales (TTFA) and People First the Sector Skills Council
 - training and mentoring can be highly resource intensive and in Section 7 Delivering the Strategy we shall explore options

- **Develop the Events Commission team as the sector champions and drivers**
 - the research demonstrated that the events sector needs a strong driver and champion to support and help them develop and had valued the support and funding received to date in spite of staffing and capacity constraints at the Events Commission, ie more support please!
 - the key challenge facing the Events Commission team and the Management Group is how best to ensure effective buy-in from stakeholders (especially local authorities) and the Welsh Assembly for further collaboration and collective investment, capitalising on the impacts already achieved
 - the senior team must be freed up from administrative duties and augmented with their own network of experienced associates and partners from the events and other sectors, as well as possible further appointments, to build their capacity for undertaking additional key tasks and activities to support and develop the sector across all 6 counties



7. Delivering the Strategy and Potential Role of the Events Commission

7.1 Presenting the Options

- The feedback clearly suggests that the status quo, ie a stand alone project hosted by Cyngor Gwynedd is not supported for the future (incl stakeholder cohesion) and the current resources and requirements for delivering the strategy cannot be found with the present arrangements. Two options have been developed for implementing the Regional Events, to be explored with the Events commission team, stakeholders and the wider events sector. They are presented below with our assessment of their relative advantages and disadvantages.

Option 1 Events Delivery taken within TPNW

Key Features:

Re-brand as "North Wales Events Commission" or "Events North Wales"; locate within TPNW; serve as support & information source for events in North Wales; manage & operate as part of TPNW; personnel same as current; activity same/similar to current; extend to include Flint and Wrexham; enhance expertise through associates; identify value-added benefits of tourism offer synergies; TPNW team to lead on all marketing activities; TPNW to manage stakeholders and supply chain; events team concentrate resources on medium to large events (for maximum beneficial impact to region); small (often 'cultural') events only supported with 'light touch' approach

PRO's:

- Benefits from existing management experience, support & monitoring
- Will enhance TPNW's offering & support activities
- Existing relationships in area
- Synergies with regional destination/activities marketing, wider events/accom packaging, especially out of area to North West etc
- TPNW relationships will assist in development of new contacts & cooperation, ie we believe that TPNW is now a highly credible vehicle for further public sector investment, ie viewed as relatively low risk
- Can assist & liaise with all 6 LA's, Assembly, TTFA, trade & other stakeholders at local level
- Part of likely regional delivery structure for all Wales Events Strategy
- Use TPNW as vehicle for regional bids: convergence ERDF/ESF, Interreg, DELLS, Sector Skills Council, which can then expand core events team or contract associates etc
- Uses current personnel
- Ease to implement & manage
- Integrate event funding support
- Contributes to TPNW overhead & economies of scale
- TPNW administrative synergies regarding events funding, evaluation and claims

CON's:

- Will still need same proportional funding
- Questionable tangible, differentiated, benefit to events industry unless additional
- Will always be perceived as operating & supporting only North Wales events – may even be perceived as 'competing' for events from other regions
- Limited number of events of sufficient size to allow commercial fees to be charged
- Limited scope for development both internally & externally within geo-demographic market
- Could be perceived as a 'do nothing' strategy
- Will there be sufficient incentive to retain the current Events Commission team and will there be a loss of the drive and passion for supporting events?



7.1 Presenting the Options continued

Option 2 Events Commission Ltd

Key Features:

Retain brand as "Events Commission"; create a stand-alone company (perhaps limited by guarantee); may locate within/adjacent to TPNW or remain in the Galeri; develop perception of serving events in all Wales & beyond; embryonic stage to develop event industry-specific expertise to support North Wales events – developing into a roll-out expertise offering to wider markets; core team of personnel acting a 'facilitators' to access wider expertise; develop events industry-specific consultancy & training including supply chain development; target events of the 'Major' & 'Large' size (not nationally managed 'Mega' size); small (often 'cultural') events supported with 'light touch' approach (perhaps using web site as portal for communication/information); could offer market research and evaluation services to events based on the impact model developed; TPNW to deliver separately the collaborative marketing especially out of area and integrated with the wider tourism offer

PRO's:

- Can use local (N.Wales) activities to develop events industry-specific expertise (legislative, licensing, H&S, training, logistics, consultancy, etc.)
- Can develop an image as a 'specialist events industry support and training agency' with wider industry credibility
- No known similar agency that delivers tangible benefit within an industry that is emerging to be far more regulated & professional
- Can roll-out offering to wider markets (initially Wales & N.W.England – later, UK)
- Can develop avenues of income from events-specific consultancy, training, supply chain management, etc. from larger events – thus moves towards fuller sustainability
- Core team plus high quality associates, even strategic partners with other companies, colleges etc
- Can become proactive in supply chain management & other events industry-specific activities
- Potentially a useful vehicle for any all Wales Events Strategy implementation, especially re technical skills, training and events development
- Could be a project to attract Convergence funding as a 'pan-Wales project', linked to more than one tourism partnership/region though still based in North Wales
- Can under-pin North Wales as a location for professionally managed & supported events
- Can be catalyst to develop & improve North Wales businesses to target events industry

CON's:

- Potentially harder to manage from existing resources (although no reason that directors should not be drawn from existing stakeholders and TPNW)
- May require reassessment of personnel (although key personnel still seen as 'facilitators' – not implementers)
- Would, initially, still require funding
- Needs to be accepted by stakeholders & partners outside region
- Critical that it is perceived not to be parochial, but to the benefit of all Welsh regions
- Depends largely upon the motivation of the senior team to develop the Events Commission into a business (even if a company limited by guarantee), ie if they do not want to do it, this is a non-starter



7.2 Reviewing the Options

- The reasons that Option 1 may be considered the better of the two options are:-
 - ✓ TPNW is well established with good public and private sector stakeholder participation and therefore probably more likely to be supported in any EU funding application
 - ✓ an experienced management team who have also been involved in supporting the Events Commission
 - ✓ the regional tourism partnership structure is very likely to be the delivery mechanism for the forthcoming all Wales Events Strategy
 - ✓ strong operational synergies in terms of tourism offer development and joint marketing
 - ✓ reduced management overhead, ie no need for Events Management Group, reporting in only to the TPNW partnership board, perhaps expanded to include events sector representatives
- Under Option 1 with TPNW as the body responsible for delivering the strategies overall and direct delivery of marketing aspects, it would still be possible for the Events Commission team (re-branded as say Events North Wales) to operate from the Galeri rather than St Asaph.
- Retaining, developing and then expanding the events sector expertise and commitment will be the key challenge for TPNW but this should be achievable. The disadvantage of Option 1 is also its strength, that the events team focuses on North Wales.
- Under Option 2 Events Commission Ltd could be contracted to undertake key activities in order to deliver aspects of the North Wales strategy but would also be able, if sufficient resources and commercial incentive, to seek other contracts and activities outside North Wales, eg all Wales events training development, specialist events consultancy in the North West of England or even partner with Capital Tourism (Cardiff) to deliver additional services to the Assembly.
- We have therefore outlined below some initial ideas for establishing Events Commission Ltd as a further stimulus to discussions regarding options for implementing the regional events strategy.



7.3 Events Commission Ltd Outline

Events Commission Ltd
(company limited by guarantee)

Vision:

Developing a sustainable future for the events industry and maximising its economic and social impact.

Objectives:

1. To be recognised by the industry, Welsh Assembly Government and public sector as being a practical, expert resource for advice, support, development and training to improve the performance of events.
2. To be profitable by Year 2 with surpluses re-invested in development of the events sector, accessing funds from a mixture of public and private sector sources.
3. To be central to the delivery of key elements of the N Wales Regional Events Strategy to regional partners via TPNW and to the Assembly's all Wales Events Strategy working with the Major Events Unit.
4. To be the focal point for all event support funding and its administration in North Wales.
5. To increase the impacts of the Events Sector in North Wales, both economic and social, including:-
 - a. development of the sector skill base
 - b. effective monitoring of supported/funded events, and
 - c. maximising supply chain opportunities in the events sector through building links with the Local Supplier Development Programme and the North Wales Events Group.

Strategies:

- **Developing Skills in the Events Industry**
 - Undertake ESF projects for skills auditing, skills & training, workshops and mentoring of events managers, staff and service providers, ie will be at least fully self-funding
 - Work with People 1ST (Sector skills Council) and the Tourism Training Forum for Wales to ensure appropriate accreditation and sector support
 - Champion the adoption of the new British Standards, UK Best Practice for events
 - Become all Wales skills developers working with other regional partners
 - Develop and offer distance learning NVQs to the events sector
- **Funding Support Management**
 - Assist the TPNW, Welsh Assembly Government, North Wales Local Authorities and other key stakeholders secure additional EU funding to financially support events (Key/Hallmark etc)
 - Explore match funding from WAG (£500,000 pa x 3) and Big Lottery Fund (£100,000pa x 3)
 - Interreg: project focused on cultural and community events with annual showcase, partnering with AIOFE and locally possibly with the North Wales Events Group
- **"WEFO Approved" Evaluation and Impact Assessment Process**
 - can be offered as service to stakeholders, WEFO and programme managers
- **Supply Chain: Develop close working relationships with:-**
 - the Local Supplier Development Programme and
 - the overall North Wales tourism offer, eg hotels/accommodation and venues, via TPNW



7.3 Events Commission Ltd Outline continued

• **Events Commission Ltd - Core Projects Revenues**

Events Funding Support (ie grants) - management & admin	£80,000
Events Industry Best Practice: audits, training (ESF)	£150,000
Interreg Events: development, mentoring, annual showcase	£100,000
Contract Services: to private and public sector incl UK, event planning/development, MR/evaluation, marketing/sponsorship	<u>£100,000</u>
Revenues Total	<u>£430,000</u>

- Resources: expanded core team and addition of associates/contractors in key skills areas, eg events marketing, events business planning, training
- Excludes direct grant funding for individual events (via TPNW)
- assumes 50% of revenues outside North Wales by Year 3, ie much more sustainable .



8. Conclusions and Recommendations

- The Events Sector in North Wales is estimated to be worth around £40M pa to the Welsh economy and encompasses approximately 600-800 events annually, the great majority of which are small and locally focused. The research highlighted significant opportunities to expand the economic impact of the sector further through more effective development and collective marketing of events, maximising supply chain efficiencies and integrating events within the regional tourism offer. In future the strategic focus should be all North Wales and cover all aspects of events development, even if specific funding streams apply only to certain geographical areas or types of activity.
- In North West Wales the Events Commission contributed in 2005 alone over £3M added value (equivalent to 70 indirect jobs per annum) to the 16 supported events which themselves generated over £14M economic impact. The loss of the Chief Executive combined with an enormous increase in administrative burdens caused by additional events nominated for support by Local Authorities and changes to WEFO monitoring requirements has seriously affected the ability of the front line team to deliver expert assistance and support to the events sector. In spite of these real difficulties, the Events Commission is well regarded and the events sector and stakeholders strongly support its future development, provided the resource and administrative issues can be addressed. There was general recognition that the events sector in North Wales, because of the existence and focus of the Events Commission currently, has a real competitive which should be built upon.
- The proposed Regional Events Strategy provides a positive vision for developing events as a sustainable key driver for economic development, for raising the profile of North Wales and maximising synergies with the wider tourism offer including venues, accommodation, attractions and destinations.
- There should be a clear focus, ie hard choices, on supporting and developing larger Key or Hallmark events (or potentially large) events, on extending the season, on much more effective and collaborative marketing. The supply chain requires development and more effective linkages with events organisers. Further investment in public (and private sector) **can** therefore clearly be justified as providing good returns in terms of added value economic impacts and indirect jobs created, especially with more robust evaluation processes now in place.
- Implementation of the events strategy should led by TPNW which provides the natural link to the all Wales events strategy when it emerges in late 2007 and critically to local authorities and other key public and private sector stakeholders. The Events Commission does not have the critical mass nor stakeholder support to deliver the strategy. TPNW is ideally placed to integrate events into the wider tourism offer and has marketing capacity and expertise within it currently as a platform for an extended role.
- However, the core strengths and capacity of the existing Events Commission senior must be retained and developed, especially in terms events management and planning, events marketing, technical and legal aspects. Such needs apply to direct assistance and broader requirements for training and mentoring. Without these specialist resources the events sector cannot develop in the future.
- This can be achieved in one of two ways: (i) taking the Events Commission team within TPNW or (ii) forming a company, perhaps limited by guarantee, which is contracted to deliver key events specific aspects of the strategy. The choice depends partly upon the desire of the current senior team themselves to develop more commercially on a wider basis.