



Edinburgh Festivals: Enhancing Digital Capabilities

Final Report
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Contents

Executive Summary	i
1 Introduction	1
2 Overview	4
3 Digital Marketplace	7
4 Digital Expo Accelerator	22
5 Conclusions	51
6 Postscript: Shared Learnings	56
Appendix A: Arts Industry Survey	61
Appendix B: Fringe Shows Survey	71
Appendix C: Artists Survey	76

Please Note: *If reading this document as an online PDF, each of the section headings above are hyperlinks allowing you to reach that section by simply clicking on the relevant text above - and a corresponding piece of text at the bottom of each page will allow you to return to this page by simply clicking on the text that reads 'BACK TO THE CONTENTS PAGE'.*

Executive Summary

Background

The Enhancing Digital Capabilities Programme was funded by the UK Government Department for Digital, Culture, Media and Sport (DCMS) and managed by Festivals Edinburgh. The Programme provided £1m of funding support to enable the 11 Edinburgh Festivals to invest in their digital capabilities to:

- enhance their digital capabilities and strengthen their digital position, while helping the development of collaborative digital commissioning, production, distribution or promotional partnerships;
- increase exposure of British cultural output to international markets to facilitate trade and boost UK exports;
- help to leverage digital platforms and technology, which will help to reach new audiences, improve productivity and skills by increasing knowledge and utilisation of digital commissioning, production, distribution or promotional models and innovations; and
- build on the world-class curatorial and convening power of the Festivals through digital activity that will aid the presentation of work to audiences in the UK and across the globe.

Activities and Outputs

The Digital Marketplace expanded the role of the Edinburgh Festival Fringe as a showcase and international market for cultural product in a new online environment and the Digital Expo Accelerator fund, supported a broad and varied range of activities across the Festivals which allowed each to explore:

- commissioning and presenting new artistic work in digital forms;
- digital production techniques to shift aspects of the live festivals to digital formats, including both digital only and hybrid events;
- operational improvements and enhancements to digital systems (e.g. e-ticketing)
- audience engagement via digital platforms and channels;
- promotion and audience development using digital channels; and
- new digital methods for education and outreach work.

Outcomes

The evaluation found evidence of positive outcomes:

- **Digital Skills:** all of the Festivals reported very substantial gains in their knowledge and skills relating to digital, even those already involved in digital working. There is also evidence of shifts towards a more strategic approach to digital working within the Festival organisations.
- **Digital capability:** the funding helped to develop digital infrastructure within the Festivals, including platforms, system improvements and infrastructure (see over). New equipment and a range of digital work/ content/ assets are also important legacies that will support future digital work, leaving the Festivals in a far stronger position regarding digital working.
- **Audiences:** the digital activities enabled all of the festivals to attract new audiences, and audiences that would otherwise not have been able to experience the festivals due either to geography or other barriers. This included strong international audiences and new bookers, and the Digital Marketplace achieved strong industry engagement.
- **Economic Benefits:** programme leverage was strong and there was income generation in areas such as ticket sales for digital events. There is evidence that the Digital Marketplace is starting to facilitate industry bookings even if it is too early to quantify these. The new digital assets and infrastructure will also deliver efficiencies for many of the Festivals.
- **Reputation:** the funding enabled the Festivals to produce high quality digital content and engage new and international audiences, enhancing further their reputation as world leaders in the field.

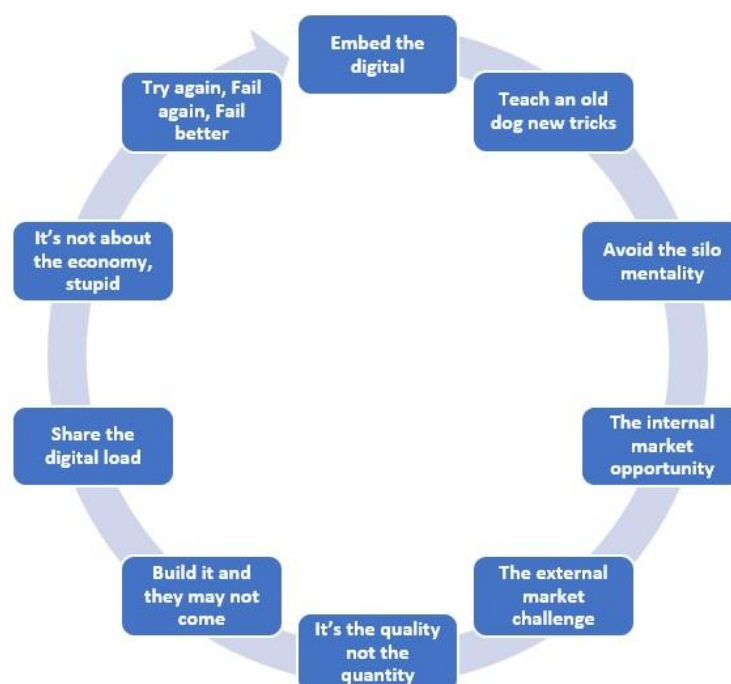
Outlook

The Programme has clearly improved digital capabilities and has also helped to clarify for the festivals the potential role that digital may play in future delivery. In light of the success of the Programme, it would be worth considering a follow up scheme to protect the gains to date and enable the festivals to continue to explore the ways in which digital working can enhance and improve their wider offer, with the Digital Marketplace being a potential star in the making.

Innovative Range of New Projects

- Digital Marketplace created at the Edinburgh Festival Fringe, with functionality enhancing the ways in which the arts industry could use such a digital space
- Creation and presentation of digital portfolios on the Digital Marketplace for specialist children’s theatre and dance companies working with the Edinburgh International Children’s Festival
- Hybrid multi-disciplinary team created at the Edinburgh International Book Festival involving Programming, Tech, Audience and Marketing to design a new hybrid festival approach and embed learning
- Digital streaming platform integrated on the Edinburgh International Festival website, attracting thousands of viewers from 60 countries, with 66% being new to the festival
- Interactive performance evaluation tool for teachers and pupils created by the Edinburgh International Children’s Festival, making a more explicit connection between the productions and the curriculum
- Twelve accessible films using deaf performers, voice and interpretation commissioned by the Scottish International Storytelling Festival, and delivered online as a worldwide festival showcase
- Programme of creative experimentation in production at the Edinburgh Art Festival, including livestreaming and use of video technologies to enhance physical artworks and projects
- Innovative digital production style developed at the Royal Edinburgh Military Tattoo, using animation and voice over to promote the festival
- Digital Hub created at the Edinburgh Jazz and Blues Festival which featured live streamed and pre-recorded concerts, plus a special feature programmed in partnership with San Francisco Jazz
- Streaming platform (Fringe Player) created at the Edinburgh Festival Fringe Society, together with delivery of full E-ticketing for the first time

Collective Range of Shared Learnings [see p56]



1 Introduction

This report presents the findings of an evaluation of the Enhancing Digital Capabilities Programme, delivered by the Edinburgh Festivals through 2021/2022.

1.1 Background and Context

The past two decades have seen a significant shift in the way that audiences engage with the performing arts and wider artforms, such as visual arts through, for example, virtual cinema events and online via YouTube and other platforms. This growing and diversifying digital marketplace has transformed the audience experience and opened up the arts to new audiences across the world. Digital technologies have also been making an impact on the commercial side of arts production, bringing efficiencies in event management and distribution, for example. The shift towards digital technologies across the creative sector has been the subject of much research over recent years¹ and has been supported through various programmes. Enhancing Digital Capabilities is part of the government's response to support the sector, with the aim to improve artistic quality and audience reach, increase productivity and skills through digitisation, and boost the economy and exports.

Although the Enhancing Digital Capabilities programme was not driven by the pandemic, the impact of COVID-19 on the creative and cultural sector has been significant and will have affected the whole of the Edinburgh Festivals' operations over the period of the programme. Music, performing and visual arts were the creative sectors hit hardest by the pandemic. Prior to the pandemic, they contributed £10.6bn in GVA and employed 314,000 people in the UK. Oxford Economics estimated that they lost 39% of GVA (- £4bn) and 26% of jobs (80,000) in 2020; by 2025 their GVA is still projected to be £1.9bn less than pre-pandemic levels, with 57,000 fewer jobs. Overall, Scotland's creative sector lost £500m (10.9%) in 2020².

Developed by the Department of Culture, Media and Sport (DCMS), Enhancing Digital Capabilities (EDC) was a £1m programme aimed at enhancing the digital capabilities of Edinburgh Festivals, which was launched in June 2021 and completed in August 2022.

¹ For example, Nesta's [Digital Culture](#) surveys from 2013-2019

² Creative UK Group (2021): *The UK Creative Industries*.

1.2 Study Objectives

EKOS was commissioned to undertake an evaluation of the programme, aimed at:

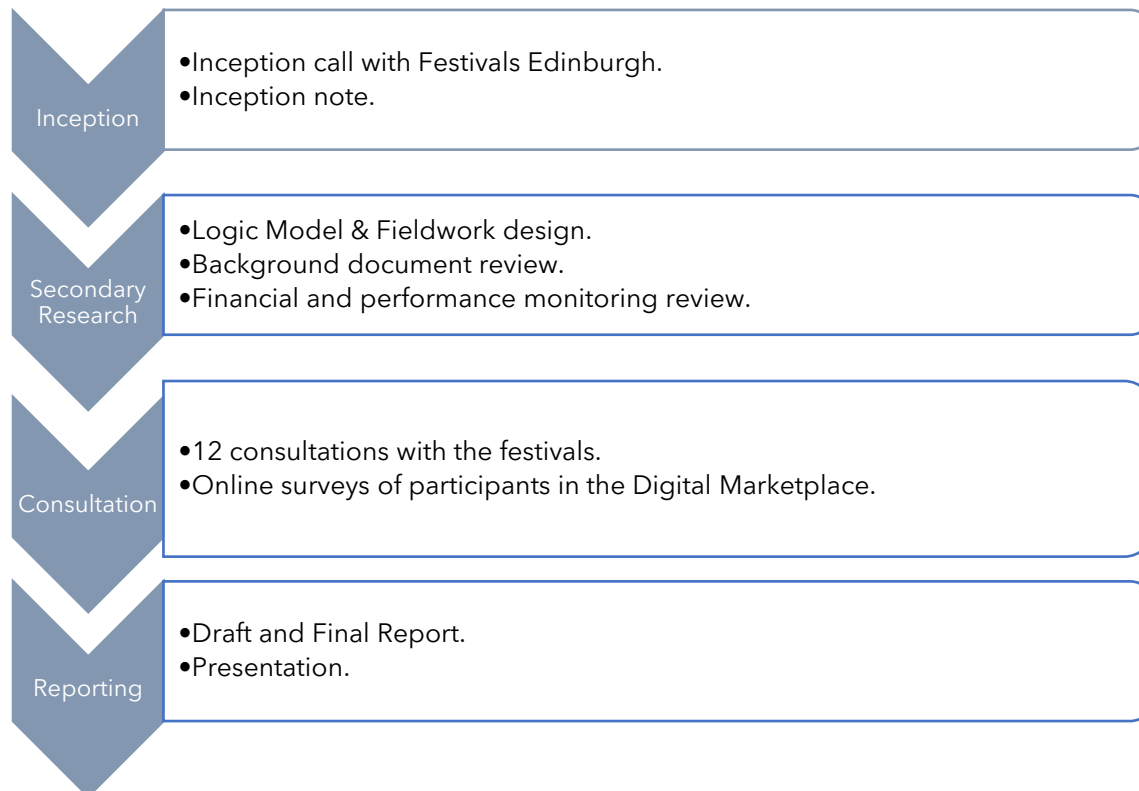
- identifying the impact of the investment on festivals’ digital capabilities;
- evidencing the impact through qualitative research, including case studies;
- evidencing the impact through relevant quantitative data provided by the Festivals; and
- drawing conclusions, recommendation and learnings from the programme.

The evaluation focuses on establishing the effectiveness of the programme with regard to the primary funding criteria set out by the DCMS and Arts Council England, namely: public benefit; value for money; presentation of work to audiences; productivity and skills; and innovation.

1.3 Study Method

The research has been undertaken between June and November 2022, using a mix of secondary and primary research, as illustrated in **Figure 1.1**.

Figure 1.1: Study Method



1.4 Report Structure

The remainder of this report is structured as follows:

- **Chapter 2:** provides a brief overview of the Programme;
- **Chapter 3** discusses the Digital Marketplace project;
- **Chapter 4:** covers the evaluation of the Digital Expo Accelerator programme;
- **Chapter 5:** sets out our conclusions; and
- **Chapter 6:** presents wider learning for the sector.

2 Overview

2.1 Introduction

The EDC arose from a series of discussions that were ongoing between various festivals and the DCMS. In particular, the Fringe Society maintains strong relationships at UK Government level and had been discussing with the DCMS the possibility of supporting digital working within the Fringe.

Following the experience of the first pandemic lockdowns and the subsequent cancellation of events, it became increasingly apparent that digital capabilities across all of the festivals could be improved. Festivals Edinburgh then stepped in to facilitate a wider bid to the DCMS to secure funding for digital projects across all of the festivals. This became the Enhancing Digital Capabilities (EDC) Programme.

The application was approved, and funding was routed through Arts Council England to Festivals Edinburgh. Festivals Edinburgh commissioned proposals from Edinburgh's 11 major festivals to develop their digital capabilities, with a fixed award of £44,000 available, subject to a satisfactory and fully costed proposal being approved by an independent assessment. The Fringe Society also provided a proposal for the Digital Marketplace project (see below). Each festival was then required to submit interim and final reports on the delivery and outcomes of their projects, which all did with the exception of Edinburgh's Hogmanay which did not submit a final report³.

2.2 Programme Objectives

The four main objectives of The EDC Programme were to:

- provide funding towards helping the festivals enhance their digital capabilities and strengthen their digital position, while helping the development of collaborative digital commissioning, production, distribution or promotional partnerships;
- increase exposure of British cultural output to international markets which will facilitate trade and boost UK exports;
- help to leverage digital platforms and technology, which will help to reach new audiences, improve productivity and skills by increasing knowledge and utilisation of digital commissioning, production, distribution or promotional models and innovations; and

³ Underbelly, which delivered Edinburgh's Hogmanay under contract, also did not participate in the evaluation.

- build on the world-class curatorial and convening power of the Edinburgh Festivals through digital activity that will aid the presentation of work to audiences in the UK and across the globe.

The funding opportunity led to the creation of two distinct programmes:

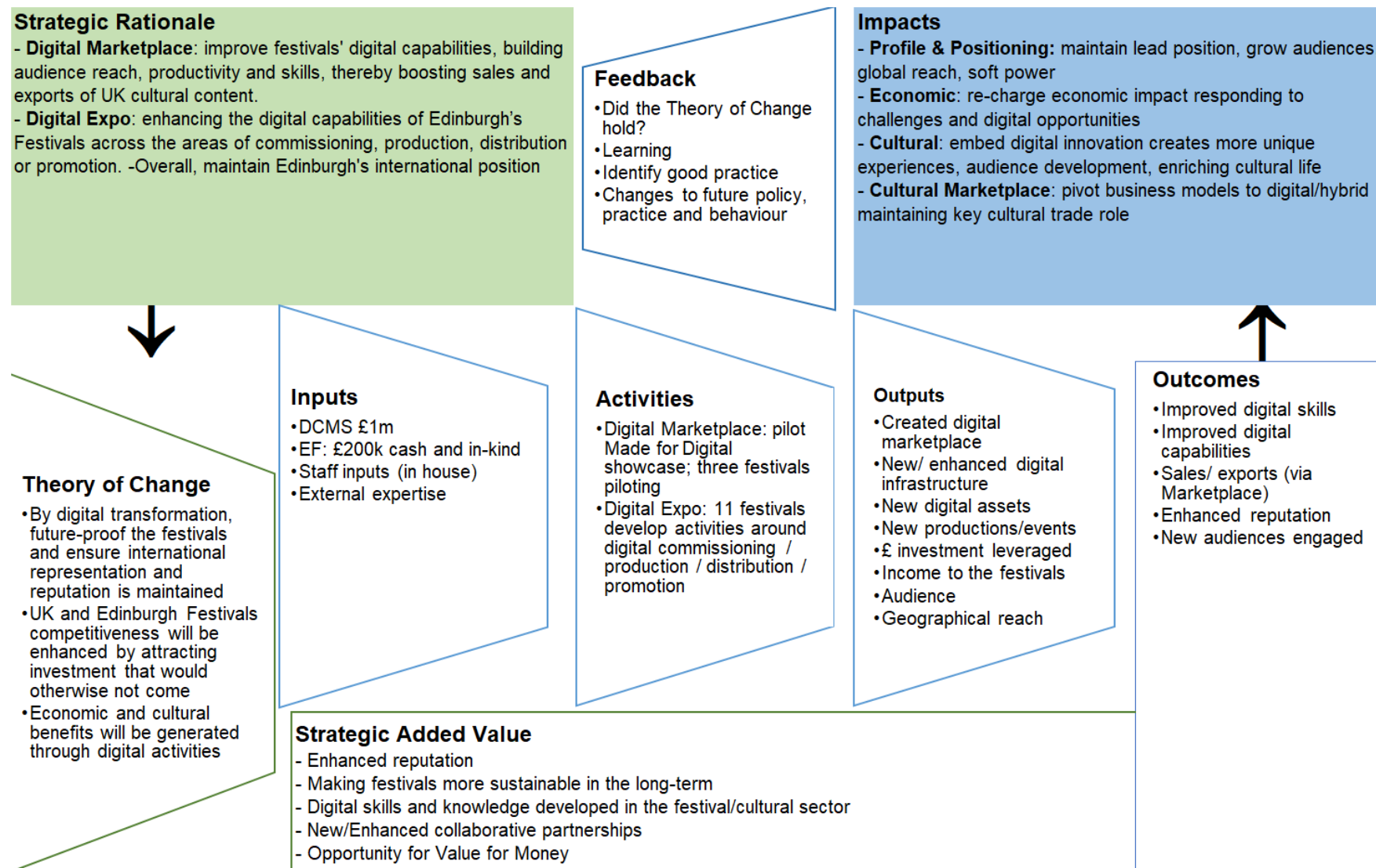
- **Digital Marketplace:** the development and testing of an online B2B marketplace, led by the Edinburgh Festival Fringe Society and involving two other festivals, which presents products by festival creatives to targeted national and international buyers to drive purchases and facilitate transactions; and
- **Digital Expo Accelerator:** a digital investment programme created to accelerate solutions to digital challenges for the 11 Edinburgh Festivals in the areas of commissioning, production, distribution and/or promotion.

2.3 Logic Model

A logic model was developed to provide a framework against which to consider the outputs, outcomes and longer-term impacts of the EDC Programme. It was developed following detailed consideration of the background documentation relating to the programme including the original programme proposal and funding agreements with DCMS, as well as the applications made by the individual festivals.

The model is based on the fundamental theory of change which proposes that improving the digital skills and capabilities of the festivals will enhance their ability to provide high quality cultural experiences for audiences, including reaching audiences that might not otherwise be able to attend the festivals in-person, and to continue to maintain their position as world leading festivals.

Figure 2. 1: Logic Model



3 Digital Marketplace

3.1 Introduction

Chapter 3 assesses the Digital Marketplace project, and draws on the original application and reports produced by the Fringe Society as well as primary research including:

- one-to-one interviews with the Fringe Society and with Edinburgh International Children's Festival [EICF] and Edinburgh Jazz & Blues Festival [EJBF]; and
- a series of surveys with Marketplace users (artists, industry professional and companies in the Fringe Show Directory).

In the case of the latter, these surveys were introduced as an additional element in the evaluation method and were combined with regular surveys that the Fringe Society issues each year following the festival. As such, the survey instruments were required to meet different needs and some compromise was inevitable.

3.2 Rationale and Objectives

In addition to its huge public presence, Edinburgh Festival Fringe (EFF) has long been considered one of the world's premier marketplaces for touring shows and a global meeting place for the arts industry. According to the Fringe Society (the organisation that underpins the infrastructure of EFF), industry at the Fringe buy work for international (and UK) touring at a high rate - programmes for festivals and key cultural venues across the globe (notably US, Canada, Australia, New Zealand, China) regularly include Fringe alumni from 1-3 years prior⁴.

The Fringe Society has long recognised this and works to support the industry through the Fringe Marketplace and associated (in-person) events seeking to facilitate connections between artists with shows that are ready to tour and industry bookers seeking new work. However, there is, at present, no mechanism for tracking this activity, nor for gathering robust data on the trade facilitated through the Fringe. This is something that the Fringe Society is actively seeking to address, noting that such developments will require additional external investment due to the scale and complexity of the plans.

⁴ Fringe Society Digital Marketplace Interim Report December 2021

The idea for a Digital Marketplace emerged during the period of lockdowns and restrictions and was intended to provide a platform for industry engagement at a time when in-person activity was not possible. It was also intended to extend the life of the marketplace beyond the period of the live festival and to work towards a more year-round model.

In fact, while the Digital Marketplace was a core part of the EDC funding programme, discussions between the Fringe Society and DCMS around support to develop and improve the Digital Marketplace were well advanced before Festivals Edinburgh became involved, and the wider programme was developed.

The EDC Digital Marketplace funding was requested to develop and test a full-service online Edinburgh Festivals B2B marketplace. *'This will develop the Festivals' digital capabilities as marketplace entrepreneurs within the live events industry's hybrid future, enabling us to capitalise on our global B2B role which brings international cultural leaders to the UK with a view to doing business and buying product'⁵.*

The Fringe Society received £425,000 from the Programme to support the development of the Digital Marketplace and showcase platforms for professional tour-ready artists, engaging industry from across the world to highlight the Fringe's talent and the opportunity for collaboration and trade.

The objectives of the Digital Marketplace project were framed largely around those of the wider Enhancing Digital Capabilities Programme (see **Section 2.1**) but with a specific emphasis on:

- Increasing the exposure of British cultural outputs to international markets to facilitate trade and boost UK exports; and
- Leveraging digital platforms and technology to reach new audiences to further boost sales and exports of UK cultural content and improve productivity and skills by increasing knowledge and utilisation of digital commissioning, production, distribution, promotional models and innovations.

3.3 Financial Performance

As noted, the DCMS contribution to the Digital Marketplace project was £425,000 and this levered a further £99,200 in cash and in-kind support. Expenditure on the technical build of the platform was greater than originally anticipated, and was offset by savings in other budget lines, most notably in project management which the Fringe Society provided as in-kind support, as shown below.

⁵ Edinburgh Festivals Proposal to DCMS, March 2021

Table 3.1: Digital Marketplace Income and Expenditure

INCOME			
DCMS (through ACE and FE)	£425,000		Allocation to EFF project
British Council	£65,000		Digital Showcase project
EFF Cash	£6,223		Additional project costs
EFF in kind	£27,977		Project management and staff
TOTAL	£524,200		
EXPENDITURE			
Budget Heading	Budget	Actual	Comments
Design Specification	£25,000	£0	Rolled into technical build budget below
Technical build	£75,000	£122,275	Marketplace and Digital Showcase technical development
Digital Architecture, support and integration	£50,000	£57,626	Hosting, licencing, SSO, etc.
Market Development: white label partner functionality	£125,000	£120,000	Digital Showcase project and Marketplace and Digital engagement toolkit developments
Trade Portfolio: Assets Development	£100,000	£100,109	£50K x 2 for Festival partners
Market Penetration: Buyer Engagement	£50,000	£57,013	Digital Showcase project, international conference attendance
Research and Further Development	£50,000	£39,200	R&D in 2021/22 to inform future development
Project Management	£50,000	£27,977	EFF in kind
Evaluation	£0	£0	Budget held by Festivals Edinburgh
TOTAL	£525,000	£524,200	

3.4 Activity and Outputs

The Digital Marketplace Programme had a number of different strands, described below.

Digital Marketplace

From 2020, Fringe Marketplace has been used by artists to showcase work and engage in conversations about touring and future collaborations. Users of the platform fall into three main groups:

- Artists/venues that have tour ready shows to promote via the Fringe Show Directory;
- Arts industry bookers/commissioners seeking to book new shows; and
- Arts industry associates who provide recommendations for shows, lending a curatorial aspect to the Marketplace.

Arts industry professionals seeking to use the Marketplace first need to be accredited by the Fringe Society, again maintaining a degree of control and oversight of the platform to ensure users are of value to the artists/producers presenting their work.

The DCMS funding enabled the Fringe Society to improve considerably the digital infrastructure for the Marketplace, adding new functionality and supporting projects to explore the ways in which the arts industry could use such a digital space. Improvements to the user experience included:

- introduction of additional 'like', 'award winner' and '5-star review' icons for relevant shows to emphasise recommendations/achievements;
- introduction of Venue Directory to offer Arts Industry an insight into the work on offer within individual programmes;
- introduction of associates/programmer's comments to contextualise work and show selections;
- better representation of shows who 'self-select' interest in further development and give industry the opportunity to decide how they prefer to browse listings (i.e., curated/non-curated);
- improvements to the show selection algorithm to randomise show order to offer a wider selection for Industry; and
- redesign and streamlining of the delegate accreditation and ticketing process to ensure a friction-free environment.

The Digital Marketplace was also repurposed to complement in-person performances and was integrated with Fringe Connect (artists' networking platform) to facilitate digital networking for Fringe artists.

In addition, the Fringe developed a partnership with TikTok, which worked with the Fringe Society to offer training and community development advice to artists, develop a TikTok industry talent spotting process, and upskill artists, venues, and promoters across a range of digital presentation and making processes.

Key statistics for the Digital Marketplace include:

- 361 Arts Industry professionals from 38 countries registered in 2021;
- 133 shows from 20 countries presented on Marketplace in 2021;
- 9 freelance Associates contracted in 2021;

- 79 shows were part of eight showcases in 2021: Horizon (England, funded by ACE), Made in Scotland, Canada, Norway, Ireland, Denmark, Switzerland and Wales; and
- 63% of artists presenting work on Marketplace in 2021 had received bookings as a direct result of Marketplace or were in meaningful discussion with programmers⁶.

Made for Digital

The Fringe Society conducted an R&D project with the British Council to assess the viability of a Made for Digital showcase of work that celebrates collaboration, co-design, and international partnership working. The project engaged high-quality products from artists from four overseas countries, (Brazil, India, Mexico, and South Africa) as well as working with Scottish and UK companies to highlight artists from around the world working in the digital performance space.

During the pilot, funds were used to: develop the digital showcase with cohort one of the two year rolling programme; develop opportunities for artists from the global south to work together and with the Fringe (Voices from the South); enable artistic exploration, widen networks and explore methods of engaging audiences with digital content; strengthen collaboration between six cultural organisations, and widen the international networks of artists and producers; draw international artists into Marketplace to increase the potential for onward touring, and provide a year-round forum hosted on Fringe Connect to support artists' creative development; and, provide a proof of concept.

The pilot involved five global partners, one Scottish partner, and 16 paid for digital commissions, productions, and/or collaborations.

Edinburgh International Children's Festival [EICF]

Building on their successful delegate programme, the EICF conducted a pilot in which they used digital presentation during the 2022 festival, supporting artists to present themselves through commissioned works and professional video production to present work to a wider industry pool.

EICF used their funds to:

- work with a digital producer and develop digital assets for six companies within the Family Encounters programme to develop a digital portfolio and present work on the Marketplace during Fringe 2022;
- commission three full length for-digital production to support in-festival engagement with their digital programme and provide high-quality digital assets for artists for onward touring;

⁶ Fringe Society Digital Marketplace Final Report June 2022

- commission three digital works from the Family Encounters programme for presentation on Marketplace in 2022 to test the efficacy of the platform for digital work for family audiences; and
- improve the ticketing process during the festival for the arts industry and the booking experience for delegates and teachers.

In total, the project contracted seven performing arts companies, 16 freelance artists, three made for digital commissions, six digital assets for professional companies, and three full length film commissions for showcasing.

Edinburgh Jazz and Blues Festival [EJBF]

EJBF does not have a delegate programme as such so this was in some ways even more exploratory and much of the funding was used to support a cohort of artists by preparing them for international touring as well as promoting them on the Marketplace platform.

EJBF used their funds to understand the scope of the audience who would be interested in seeing jazz and blues at the Fringe and to improve the ability of artists to promote their work online. As such, they delivered:

- a training programme to artists to build their understanding of international touring and engagement;
- supported artists to develop digital marketing assets and provided longer term resources for their ongoing industry engagement;
- presented artists on Marketplace during the 2022 Fringe; and
- supported artists through the process to maximise bookings and/or agent pick up.

The project involved 86 musicians, seven freelancers, and nine projects by Scottish musicians that were exported internationally.

3.5 Marketplace Users' Perspectives

3.5.1 Arts Industry Survey

A survey was undertaken with Edinburgh Fringe attendees within the arts industry. The survey received a total of 147 responses, and respondents ranged from freelancers and assistants to CEOs. Full results can be found in Appendix A, and amongst the findings were:

- over two-thirds of respondents listed their country of residence as within the United Kingdom (69%). A further 14% stated they reside in European countries and the final 17% were international - including the United States of America, Dubai, Australia and Japan;

- respondents identified their main objectives when engaging with the Edinburgh Fringe Festival as being, finding shows to programme, networking and engaging with talent for future commissioning;
- the most common type of show respondents were aiming to programme was theatre (78%);
- over four fifths of those surveyed felt they had achieved their goals (82%), with only 2% reporting that they did not achieve their main objectives;
- over one third (36%) reported that they had booked work, with a further 24% stating they were in the process of booking work/in talks to book work;
- the most commonly used Marketplace services used were the complimentary ticket request and accreditation services - with very few respondents not utilising any of the available services;
- over one third (36%) of Fringe Marketplace users booked work or offered a commission to a Fringe 2022 show/artist, with a further 35% were also in talks to complete bookings - meaning that overall, 71% of Marketplace users were able to start the process to book work or find shows/artists to commission from the 2022 Fringe Festival;
- when asked about the website functionality, the majority of respondents (89%) rated this positively - 33% of which rated it very good;
- the majority of respondents felt that the range and quality of shows provided by the Marketplace site were good, with 91% and 83% respectively, rating these aspects positively; and
- of the features of the Fringe Marketplace they found useful in supporting their engagement and objectives, the ability to browse shows was the most commonly mentioned feature, followed closely by arranging access to tickets for shows.

3.5.2 Fringe Shows Survey

A survey was carried out with a targeted group of Marketplace artists (those that were selected by the venues for inclusion on the Fringe Marketplace). Full results can be found in Appendix B, and amongst the findings were:

- just over half (53%) of those who submitted shows to the Fringe Show Directory on the Fringe Marketplace listed their location as within the UK. Of this, 12% were Scottish and the remaining 41% were English. Those who were international came from Australia and the United States;
- the most popular genre was theatre, with dance and cabaret and variety being the least common;

- just under three quarters of respondents (71%) stated that they were looking for bookings after presenting their work at the Edinburgh Festivals;
- in terms of location, many stated that they were aiming to book their show(s) across Scotland and the UK, while some stated they wanted to expand internationally;
- respondents identified promoting their show, followed by increasing and expanding networks, as what they hoped to get from their engagement with Fringe Marketplace;
- 36% of respondents felt the digital platform for Fringe Marketplace could integrate better with the live festival; and
- Nearly half of respondents [47%] said that they were very likely to promote/sell their show(s) through Fringe Marketplace in the future.

3.5.3 Artists Survey

Finally, a survey was carried out with artists who submitted their show(s) to the Fringe Show Directory but were not selected by their venues for inclusion on the Fringe Marketplace. Full results can be found in Appendix C, and amongst the findings were:

- over half of respondents (53%) stated that they were based in the UK. There were also a few international respondents, from Australia and Korea;
- the majority of respondents stated that their work fit into the theatre genre, though some shows fell under multiple genres;
- 87% stated that they were looking for bookings after presenting their work at the 2022 Edinburgh Festivals;
- one third of respondents reported that their show has been booked or given other opportunities as a result of performing at the Fringe, with a further 27% reporting that while this has not happened yet, they are in the process of being booked/given opportunities;
- Nearly half of respondents (47%) positively rated the unique show listing link to share with industry professionals; and
- One third [33%] said that they were very likely to promote/sell their show(s) through Fringe Marketplace in the future.

3.5.4 Summary of Survey Results

The survey results all confirm the international reach of the Fringe as an industry Marketplace and, across the board, respondents were positive about the Fringe Marketplace. The platform functionality, ease of submission and the access to information, shows and industry contacts were all well received by the various user groups. Encouragingly, there is also evidence that (industry)

Marketplace users are booking shows, with 71% of those using Marketplace reporting that they had either booked a show or were in talks to do so.

What is maybe less clear from the data is the extent to which this booking activity was driven by the Digital Marketplace. While the proportion of Marketplace users reporting that they had booked or were in talks to book was higher at 71% than the wider sample of industry professionals (60%), artists and shows were less sure that bookings could be attributed to the Marketplace. It is likely that the Digital Marketplace allows bookers to identify possible shows to attend, and that subsequent negotiation then takes place offline, with the artists/shows never really knowing to what extent this may have arisen as a result of their involvement with the Marketplace.

It is clear that the Marketplace is also highly valued as a tool for networking and information about Fringe shows, and there is evidence to suggest that a substantial proportion would use it again in the future, including between festivals. This was particularly the case for the industry professionals.

The one area in which feedback was maybe more mixed was around the extent to which the Digital Marketplace integrated well with the live festival, which typically attracted more equivocal responses. This is perhaps not surprising given that this was the first year that the Digital Marketplace operated within a full live festival. It also chimes with the feedback from the festivals themselves that they are and will remain largely live events, with digital elements a valuable and useful addition, but certainly not a replacement.

3.6 Outcomes

Again, in considering the outcomes from the Digital Marketplace activities we have related these to the main areas of commissioning, production, distribution and promotion and have considered skills and export outcomes. Our assessment here draws on the interim and final reports provided by the Fringe Society and the input from the participating festivals (Fringe Society, EICF and EJBF).

3.6.1 Commissioning

The Fringe Society does not commission work, and Digital Marketplace is not primarily intended to be about the development of new work. The Made for Digital Showcase element did involve the development (if not direct commissioning) of new digital work through the Voices from the South showcase project. EICF also used funding to commission new digital assets as did EJBF.

Table 3.2: Commissioning Outcomes

Objective: seize the opportunities of creative commissioning in the digital sphere	
Element	Reported Outcomes
Made for Digital	<ul style="list-style-type: none"> Enabled the development and realisation of a digital showcase.
EICF	<ul style="list-style-type: none"> Worked with a digital producer to develop digital assets for six professional companies within the Family Encounters programme to develop a digital portfolio and present work on Marketplace during Fringe 2022. Commissioned three professional quality full length for-digital productions to support in-festival engagement with their digital programme and provide a high-quality digital asset for artists for onward touring. Commissioned three digital works from the Family Encounters programme for presentation on Marketplace in 2022 to test the efficacy of the platform for digital work for family audiences.
EJBF	<ul style="list-style-type: none"> Supported artists to develop professional high quality digital marketing assets, providing longer term resources for their ongoing industry engagement.

3.6.2 Production

The commissioning work highlighted above did involve some digital production work, as highlighted below.

Table 3.3: Production Outcomes

Objective: meet the unique production demands associated with high quality digital work	
Element	Reported Outcomes
Made for Digital	<ul style="list-style-type: none"> Enabled artistic exploration, reimagining and/or creating work in the digital sphere, developing artist skills, exploring new methods of engagement with audiences, widening networks with artists and industry members from

	widely different geographical, social, cultural, linguistical and financial contexts and locations.
EICF	<ul style="list-style-type: none"> The digital producer and commissioning process enabled the participating companies to learn about and explore digital production processes.

3.6.3 Distribution

All of the Digital Marketplace work focussed on the presentation of work in the Marketplace itself, but this is not full form digital presentation and is less about the distribution of work via multiple platforms.

Table 3.4: Distribution Outcomes

Objective: address the challenges and complexities of digital distribution platforms	
Element	Reported Outcomes
Digital Marketplace	<ul style="list-style-type: none"> The Fringe Marketplace is itself a distribution platform although its focus is on industry promotion rather than audience engagement. Nonetheless, it offered opportunities for participating artist to learn about how to present themselves and their work in a digital space.
Made for Digital	<ul style="list-style-type: none"> This element supported the development of new work from the participating international companies. This will be shown as a digital showcase in 2023.
EICF	<ul style="list-style-type: none"> The project helped develop digital assets that participating companies can use for promotion both within and outwith the Marketplace platform.
EJBF	<ul style="list-style-type: none"> Again, the Marketplace funding supported the development of digital assets - mainly videos and photos - that artists can use to present their work in digital platforms including but not limited to Fringe Marketplace.

3.6.4 Promotion

All of the Digital Marketplace work is focussed on promotion albeit within an industry rather than public audience context.

Table 3.5: Promotion Outcomes

Objective: enhance the reach and engagement of creative work through new approaches to digital promotion	
Element	Reported Outcomes
Digital Marketplace	<ul style="list-style-type: none"> The development of an enhanced Marketplace platform is a key legacy of the project and will continue to be used by the Fringe Society to connect artists with industry and facilitate cultural exports.
Made for Digital	<ul style="list-style-type: none"> As a dedicated digital showcase of work made specifically for digital presentation the Made in Digital project will help both to promote the participating companies (including four international companies) as well as enhancing the international reputation of the Fringe.
EICF	<ul style="list-style-type: none"> Digital assets will be used for ongoing promotion by the supported companies and the marketplace platform was a valuable addition to the CF's delegate programme.
EJBF	<ul style="list-style-type: none"> Better understanding of target digital audience. Increased understanding amongst the participating artists of how to prepare for international working/touring.

3.6.5 Skills Development

Arguably the most important outcomes of the EDC programmes are those that relate to the development of digital skills and capabilities within the festivals. The Digital Marketplace projects in some places has also extend these outcomes to participating artists as well as the festivals. The skills outcomes are summarised in **Table 3.6**.

Table 3.6: Skills Outcomes

Objective: develop skills and capacities in digital technologies	
Element	Reported Outcomes
Digital Marketplace	<ul style="list-style-type: none"> Funding has enabled accelerated digital skills development across all participating festivals, with a noted improvement in both digital confidence and digital literacy. Marketplace is unique in the market as a space for Industry to actively engage with work they are seeking to book/buy (accreditation requires evidence of this buying capacity). Alongside this, the funding has enabled further support, from British Council and TikTok. The Fringe Society reported that the project has significantly improved the digital capabilities of the organisation.
Made for Digital	<ul style="list-style-type: none"> The development of the Made for Digital Showcase is an innovative model of co-production and is focussed on work made for digital presentation, offering a new view of the future of performance in a digital space, upskilling both artists and partner organisations and generating new ways of thinking about digital space as a venue/platform for future digital commissioning.
EICF/ EJBF	<ul style="list-style-type: none"> The development of Marketplace and new features alongside the work undertaken by EICF and EJBF offers a range of models of engagement and production to test the effectiveness and value of digital engagement and showcasing. The project has helped to develop deeper understanding of working digitally for the EICF and EJBF as well as their participating companies/artists.

3.7 Learning

All of the festivals reported significant learning and skills development as a result of the Digital Marketplace funding. For the **Fringe Society** the project, in combination with the Digital Expo Accelerator work, has been transformational and has substantially improved the organisation’s digital capabilities. Although the Digital Marketplace is still in its infancy as a functioning B2B

marketplace and there is much still to learn about how the arts industry will want to use such a digital environment in future.

While the live festival was significantly curtailed in 2021, the 2022 event was largely back in full form and as a result the Digital Marketplace operated alongside the live festival proper for the first time. It seems that booking and commissioning activity continues to be conducted in-person, but that the Marketplace provides a means for bookers to identify likely shows and information. As such its fundamental role is more promotional than transactional. The extent to which it will continue to attract significant industry interest and activity outwith the festival period will remain to be seen. Nonetheless, the Fringe Society remains committed to continuing to operate the Marketplace as part of its overall approach to industry engagement and cultural exporting.

The Voices from the South digital showcase project has also generated useful learning about how to develop and present work digitally, as well as the challenges of facilitating international collaborations in a digital space. In particular, time and resources to support participants are required.

For **EICF** the Marketplace activity has been similarly beneficial. Working with a digital producer has significantly improved the organisation's understanding and knowledge of digital production and of how to use digital platforms for the promotion and presentation of work. Work for children has a smaller industry audience and does not always sell well at the Fringe (which is not primarily a children's festival). It can also be challenging for children's shows to work financially at the Fringe when competing with more commercial shows, so the Marketplace funding enabled a number of children's companies to have at least a (digital) presence at the Fringe without the financial risk.

The festival and its companies also had to learn how to develop digital assets that were of sufficient quality and not just archival. This is where the digital producer role was particularly valuable.

Having the channel within Marketplace for the festival was also valued as it provided an opportunity to promote the companies but also the festival itself. High quality digital assets also help to present the festival as of a high calibre which in turn could attract programmers to attend in future.

As noted above, part of the EICF funding was used to improve the digital ticketing system for delegates and again this has been identified as important and will be something that continues in future. The previous system was struggling to meet the requirements for audiences, schools and delegates so having a new box office system for delegates has greatly simplified and improved the situation. This will be a legacy for the festival.

EJBF used the Marketplace funding both to provide training and support to artists to ready them for international work and to invest in the development of digital assets to be used on the Marketplace. The festival identified the training work as being particularly valuable, providing

important skills development benefits for the artists. Obviously, the development of promotional digital assets is also useful and will continue to support the artists in seeking international work.

The festival did note that the accreditation system for industry access to the Marketplace was a barrier to music bookers. The music industry tends to work less formally than this and future efforts to promote music via the Digital Marketplace may need to take this into account in seeking to attract music promoters and programmers.

3.8 Economic Benefits

As noted above and in the logic model (**Section 2.2**) one of the aims of the Digital Marketplace was to facilitate cultural exports by connecting artists with tour ready shows to industry buyers/bookers. In this respect the project seems to have attracted a substantial number of:

- industry professionals (361 registrations from 38 countries in 2021); and
- shows (133 shows from 20 countries presented on Marketplace in 2021).

While none of the festivals reported any direct economic benefits (at least so far) arising from the Digital Marketplace, the Fringe Society's final report on the Marketplace project reported that 63% of artists presenting work on Marketplace in 2021 had received bookings as a direct result of Marketplace or were in meaningful discussion with programmers. Our own research with users of Marketplace in 2022 broadly confirms this although the extent to which these outcomes are solely attributable to the Digital Marketplace is not clear - the Fringe ran as a full live event in 2022. Neither EICF nor EBJF were aware of any direct sales achieved via the Marketplace, but again it may be that it is still too early.

Overall, the evidence suggest that it is still too early to assess properly the economic benefits arising from the Digital Marketplace. Feedback from the Fringe Society suggests that bookings typically take up to three years to happen post festival and the highly unusual nature of the market during the time in question (with so many restrictions on live events) will also have suppressed activity.

It is also worth noting that the Marketplace is not likely to generate any income for the Fringe Society itself, unless it develops to the point where other festivals might wish to licence it in some form, although this is not a priority.

4 Digital Expo Accelerator

4.1 Rationale and Objectives

Edinburgh Festivals submitted a proposal to DCMS to create a digital investment vehicle aimed at accelerating solutions to digital challenges in the commissioning, production, distribution and/or promotion of the festival programmes. *'This will develop the Festivals as laboratories of new thinking and augment creatives' digital knowledge and skills, helping live cultural events and cultural workers to redefine a more sustainable hybrid live/digital future*⁷.

It was anticipated that the projects would enhance the digital capabilities of the Festivals, addressing key questions such as how best to:

- seize the opportunities of creative commissioning in the digital sphere;
- meet the unique production demands associated with high quality digital work;
- address the challenges and complexities of digital distribution platforms; and
- enhance the reach and engagement of creative work through new approaches to digital promotion.

DCMS allocated this element of the overall programme funding of £500,000, with the Festivals required to provide at least 10% match funding and could leverage other financial contributions from elsewhere.

Festivals Edinburgh commissioned proposals from Edinburgh's 11 major festivals to develop their digital capabilities, with a fixed award of £44,000 available, subject to a satisfactory and fully costed proposal being approved by an independent assessment panel. Each festival sought to use the Digital Expo Accelerator funding to expand their digital capabilities in order to develop their capabilities and offer something new for artists and/or audiences (see **Table 4.1**).

⁷ Edinburgh Festivals Proposal to DCMS, March 2021

Table 4.1: Digital Expo Accelerator Activity Summary⁸

Festival	Activity Summary
Edinburgh Art Festival (EAF)	Expand the festival's capacity for digital production and presentation by enabling innovative programming and commissioning for digital platforms to create new digital experiences for audiences and artists.
Edinburgh International Book Festival (EIBF)	Investing in technology, research and development to create unique experiences for in-person and digital audiences through a hybrid book festival.
Edinburgh International Children's Festival (EICF)	Harness digital innovation to increase the festival's outreach and engagement with schools, families, and delegate audiences through a new digital learning platform, content creation strategy, and digital delegate offering.
Edinburgh International Festival (EIF)	Improve and enhance Edinburgh International Festival's digital distribution through a new digital platform to improve audience experience and allow the International Festival to further understand its digital audience.
Edinburgh International Film Festival (EIFF)	Develop a brand-new series of online events (the Fan Club) which pair Scotland's best known cultural figures with their favourite filmmakers for compelling virtual conversation which will re-engage audiences with the joys of communal experiences.
Edinburgh Festival Fringe (EFF)	Developing digital technologies to future proof the Fringe by through the digital presentation of artists' work and fringe services to enable virtual engagements between the sector and audiences.
Edinburgh's Hogmanay (EH)	Create a special Hogmanay live music show which is performed across the city's most unique, atmospheric venues and broadcast digitally.
Edinburgh Jazz and Blues Festival (EJBF)	Develop an experiential online venue that merges pay-to-view content, exclusive behind the scenes content, and social interaction so that audiences can discover new recommendations and a new online community.
Edinburgh Science Festival (ESF)	Strengthen staff digital knowledge and skills in line with emerging technologies and equipment to develop the festival's approach to digital content creation and increase audience reach through this content.
Scottish International Storytelling Festival (SISF)	Increase the capacity, production, skills and reach of the festival and its artists through developing and testing a new hybrid offer.
The Royal Edinburgh Military Tattoo (REMT)	Developing and producing six short digital films which capture and represent the core offer of the Tattoo.

⁸ Festivals listed here in alphabetical order

Table 4.2, over, provides a summary of the cross-cutting themes the festivals were targeting with their individual projects.

Four festivals (**EAF, EIF, ESF, SISF**) planned to use DCMS funding for the purposes of **commissioning**. Here, festivals were using funding to commission digital works. In some instances, this reflected digital only commissions with content being hosted online, while in others, digital commissions were used for in-person events to generative innovative immersive experiences. For example, in 2021 ESF delivered an immersive digital art experience called ‘Elemental’, while in 2022 they commissioned several artistic digital/multimedia artistic works as part of the Datasphere exhibition.

Where festivals were targeting digital **production** (eight festivals – **EAF, EIBF, EIFF, EFF, EH, ESF, SISF, REMT**), they were typically seeking to develop new digital offerings for audiences to engage with. For example, the International Book Festival planned to expand their offer by producing over 250 hybrid events through a series of cross-artform commissions that made use of digital and live experience. To do this, they used their funding to purchase recording equipment like cameras.

Seven festivals (**EIF, EIFF, EFF, EH, ESF, SISF, REMT**) planned to use the Digital Expo Accelerator funding to improve the **distribution** of output. Typically, this involved festivals developing, adopting or adapting digital platforms to display works. For the Edinburgh International Festival, this meant including muse.ai on their festival website so that viewers could sign into their accounts to access digital content which provided a mechanism to digitally distribute digital media and gather audience data to drive future developments. Alternatively, the Fringe Festival sought to develop a bespoke solution, ‘Fringe player’, to host fringe content alongside the ability to host content from other digital platforms using secure URL access.

Addressing **promotion** was included by six festivals (**EICF, EIFF, EJBF, ESF, SISF, REMT**). Here, festivals were generally seeking to produce new promotional material or take advantage of new digital promotional materials. For instance, the Tattoo developed a new and innovative strategic marketing approach which saw a series of specially commissioned digital assets geo-targeted at specific audience segments.

Table 4.2: Thematic Focus of Proposals

	Commission	Production	Distribution	Promotion
EAF	X	X		
EIBF	X	X		
EICF				X
EIF			X	
EIFF		X	X	X
EFF		X	X	
EH		X	X	

EJBF				X
ESF	X	X	X	X
SISF	X	X	X	X
REMT		X	X	X

Note: Table based on the self-identified report of the festivals in their proposals.

4.2 Financial Performance

4.2.1 Budget

DCMS required all proposals to demonstrate an element of partnership funding, including at least 10% of cash contributions from the public or private sectors. As **Table 4.3** shows, a number of festivals leveraged substantial sums of money from other sources to contribute to their project budgets. Only one (**SISF**) planned to fully self-finance the match funding. Three festivals (**EFF**, **EH** and **EJBF**) envisaged earned income from ticket sales. The total amount budgeted for the Digital Expo Accelerator projects reached £1,173,850, of which 41% was from DCMS.

Table 4.3: Planned Budget and Sources of Income

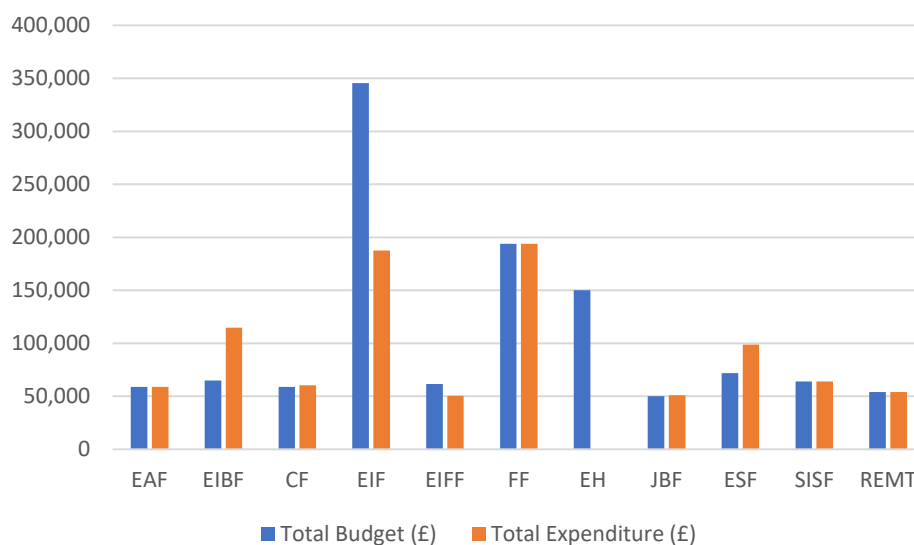
	Total Budget (£)	DCMS Contribution (£44k) as % of Total	Own Funds	Public Sector	Private /Third Sector	Earned Income	In-Kind*
EAF	59,000	75%	10%	8%			7%
EIBF	65,050	69%	8%	23%			
EICF	58,890	75%	8%	10%	3%		3%
EIF	345,400	13%	76%		12%		
EIFF	61,500	72%	13%		14%		2%
EFF	194,000	23%	29%	16%	18%	11%	3%
EH	150,000	29%	15%			56%	
EJBF	50,000	88%				12%	
ESF	72,010	61%			39%		
SISF	64,000	69%	9%				22%
REMT	54,000	81%			19%		
TOTAL	1,173,850						

Source: Project Proposals. *In-Kind derived from staff management costs and/or Artist copyright contribution.

4.2.2 Final Expenditure

Final expenditure has now been declared by all but the Hogmanay Festival. The ten festivals have spent a total of £933,927 on Digital Expo, including the £440,000 DCMS contribution (47% of the total). In the main, the Festivals kept roughly in line with planned expenditure, with the exception of **EIF** which spent substantially less and the **ESF** and **EIBF** which spent more (**Figure 4.1**).

Figure 4.1: Planned v Actual Expenditure on Digital Expo



Note: no final expenditure data were provided for Edinburgh’s Hogmanay.

As **Table 3.4** shows, some festivals were successful in leveraging a wide range of other funds. As noted above, the Book and Science festivals spent more: **EIBF** added more of its own funds and **ESF** attracted more public sector contributions than initially envisaged.

Table 4.4.: Final Expenditure and Sources of Income

	Total Expenditure (£)	DCMS Contribution (£44k) as % of Total	Own Funds	Public Sector	Private /Third Sector	Earned Income	In-Kind*
Edinburgh Art Festival (EAF)	59,000	75%	10%	8%			7%
Edinburgh International Book Festival (EIBF)	114,736	38%	48%	14%			
Edinburgh International Children’s Festival (EICF)	60,337	73%	12%	8%	4%		3%
Edinburgh International Festival (EIF)	187,646	11%	48%		41%		
Edinburgh International Film Festival (EIFF)	50,372	87%	*		13%		
Edinburgh Festival Fringe (EFF)	194,000	23%	29%	16%	31%		1%
Edinburgh’s Hogmanay (EH)	TBC						
Edinburgh Jazz and Blues Festival (EJBF)	51,121	86%				14%	
Edinburgh Science Festival (ESF)	98,715	45%		45%	10%		
Scottish International Storytelling Festival (SISF)	64,000	69%	9%				22%
The Royal Edinburgh Military Tattoo (REMT)	54,000	81%			19%		
TOTAL	937,583						

Source: Project Reports May 2022. *Accounting anomaly in final report.

EIBF raised their own contribution to almost £55,000 and secured over £15,000 from the Platforms for Creative Excellence Fund [PLACE] - an innovative three way partnership between the Scottish Government, the City of Edinburgh Council and the Edinburgh Festivals. This allowed them to increase their investment in new facilities. **ESF** also received PLACE funding (not originally envisaged) totalling £38,715 and £6,000 from City of Edinburgh Council, with a smaller proportion coming from the private sector (Cirrus Logic, £10,000).

The **EJBF** has declared earned income of £7,120 (slightly more than expected) while the **EFF** generated £26,025, also slightly more than envisaged). **EIFF** attracted audience donations (£4,372 or around half of envisaged donations).

4.3 Prior Digital Working

Edinburgh's Festivals are fundamentally live events. As a result, the extent of digital working across the festivals prior to the pandemic was limited and focussed mainly on promotional activities such as online trailers and some social media promotion. There was some activity around internal systems and e-ticketing (e.g., Fringe), and some nascent interest in the potential of digital to mitigate climate impacts (e.g., Book Festival) but none of the festivals, despite interest, had really devoted significant effort or investment into digital activity. Indeed, few had previously identified a clear need for significant investment in digital systems and processes, much less the presentation of their cultural programme on digital platforms. The exception to this may be EJBF which had prior experience in live streaming and monetising a digital festival.

Of course, the pandemic and the lockdown periods changed this almost overnight, and the festivals were effectively forced into some kind of digital response during 2020. This predates the EDC investment, and in many cases, it enabled the festivals to start to think more deeply about how to use digital as part of their wider offer.

2020 was essentially reactive, and almost all of the festivals offered some form of digitally mediated event. While some reported that this had been a steep learning curve, but one that certainly helped develop their skills and knowledge, most found it challenging to engage in a crowded digital landscape. Audience numbers were lower than pre pandemic, although for many the geographic spread of their online audience was wider than that of the live event.

Then, into 2021 the uncertainty persisted, making the timing of the DCMS investment particularly helpful. For most of the festivals, the experience of having to adapt quickly to the lockdown had helped them to start to identify areas for possible future development. The experience of staging digital events in 2020 afforded the festivals insights into the challenges and opportunities of digital, and this knowledge became the basis for their applications to the Digital Expo Accelerator.

In this way the Digital Expo Accelerator funding was not about supporting the festivals' responses to the pandemic. Instead, the focus was more on innovation and experimentation in various aspects of digital working informed by the pandemic experience and delivered at a time when the pandemic was still live, and the environment highly uncertain.

4.4 Digital Expo Accelerator Project Ambitions

The Digital Expo Accelerator projects all sought to develop the digital capabilities of the festivals but varied in their emphases. Most were, to some degree, experimental in that they sought to test new (to the festivals) approaches, while building capacity and skills within the festival organisations.

For most, the Digital Expo Accelerator funding was an opportunity to experiment with models for hybrid festivals combining some live events (subject to the prevailing Covid guidance at the time) with a digital programme. The experience of the previous year was such that the festivals sought to do more than simply live streaming events.

The exception here was The Royal Edinburgh Military Tattoo (REMT) which did not stage an event at all in either 2020 or 2021. Instead, REMT sought to use this period to refresh its brand using digital channels and platforms. Similarly, Edinburgh International Film Festival (EIFF) used the Digital Expo Accelerator funding to target specific target audience segments (Millennials and Gen Z) with programme content and promotion.

For others, the engagement of specific audiences was also a key driver. Edinburgh International Children's Festival (EICF) identified the potential of digital to support school engagement as well as their public and industry audiences and the Science Festival had a focus on using digital presentation to encourage science engagement.

While audience engagement was a common theme, ambitions regarding likely online audience numbers were generally modest. There was no expectation that digital presentations would attract large audiences (the experience of 2020 likely tempered these expectations) but there was a focus on reaching wider geographic audiences and possibly also those that might, for other reasons, be less able to attend live events.

Interestingly, Edinburgh International Book Festival (EIBF), Edinburgh Jazz & Blues Festival (EJBF) and Scottish International Storytelling Festival (SISF) were all clear at the outset that the future of these festivals would lie in a hybrid model. For these festivals, the Digital Expo Accelerator funding was therefore a means of testing models and techniques that were always intended to be a core part of the future offer. Others were interested in testing the potential of digital to add to the existing format but were arguably less focussed on digital as such a fundamentally transformative aspect of the festival.

Perhaps the strongest and most consistent theme running through the Digital Expo Accelerator projects was that of building capacity and generating useful learning for the organisations. All of the festivals sought to use the funding to experiment, learn and build their own knowledge, skills and capacities for digital working. While many made use of external expertise to support project delivery, there was a clear emphasis on learning from that external expertise and ensuring some knowledge transfer to internal teams.

A few of the festivals also sought to use Digital Expo Accelerator funding to develop new or improve existing systems and platforms. EIF, for example, developed a bespoke platform for presenting work and upgraded aspects of their CRM system, while the Fringe Society invested in a new e-ticketing system and the Fringe Player platform. EJBF also developed a new 'digital venue' on their website using Vimeo to stream as well as an integrated ticketing platform.

Finally, many of the festivals also sought to commission digital work. EAF for example commissioned two artists to make digital/online works, and the International Festival also commissioned digital work (Dancing in the Streets). SISF also commissioned some elements and the REMT commissioned digital assets for their rebranding campaign. Others produced digital content by filming events (e.g., Edinburgh's Hogmanay) and/or using archive materials.

Thus, the festivals all approached the Digital Expo Accelerator project with varied but clear objectives in mind. All were focussed on using the funding to develop their digital capabilities, with many actively exploring the long-term role that digital might play in the festivals.

4.5 Activities and Outputs

The following summary of delivery, activities and outputs draws on the interim and final reports provided by the 11 participating Festivals.

Edinburgh Art Festival

EAF brought in technical and creative freelance expertise to build capacity within the organisation, which has enabled them to move into previously unexplored areas of media production.

The new website that EAF created using Digital Expo Accelerator funds, offering a wealth of new content, saw an upturn in reach and engagement across 2021 and 2022. There were 154k website page views in 2021, and 120k website page views in 2022 (which was supported by a Google Ad Words campaign). On socials, Instagram followers were up 21% across 2021 and in 2022 Facebook follows were up 9% across the two years; and Twitter was up 4%. Reach across all platforms in both years totalled 428k. Geographically, they were able to reach 35 countries across six continents, suggesting the website has clear potential to boost the profile of the festival.

In 2020 while the festival was cancelled due to covid restrictions, the team presented a successful digital programme throughout August. When Edinburgh Art Festival returned in 2021, they presented a concentrated and professionally produced digital offering alongside the physical programme across the city, with the aim to continue to provide new points of access for audiences. In 2022, the focus of investment shifted to the creation of longer-term resources and assets, e.g., festival trailers, video interviews with artists and enhanced website.

In addition, work with the Community Wellbeing Collective in a deprived area of Edinburgh resulted in a new digital brand, website and social media presence, along with production of short video vignettes receiving greater depth and diversity of reach with local audiences.

Edinburgh International Book Festival

The Festival built a new hybrid multi-disciplinary team involving Programming, Tech, Audience Services and Marketing, to design the hybrid festival approach and embed learning across the organisation. The Technical Production team worked year-round with Lyceum Theatre to produce three events, increasing understanding of how to produce and broadcast performances to equally engage in-person and live audiences.

The 2021 hybrid festival made use of three studios to deliver 237 streamed events – of which 136 had a live in-person audience. The bulk of the attendances to the hybrid festival were online, 54,075 online attendances compared to 7,925 in-person attendances. In total, there were 14,594 bookers across the in-person and online events, indicating that individual attendees went to multiple performances. Of these attendees, 60% had not previously held an account with the International Book Festival which may suggest a hybrid format allows the festival to expand its reach. 'The online offer was based on a 'Pay What You Can' model and in total 41% of bookers for such online events paid for their tickets.

Edinburgh International Children's Festival

Funding paid for increased digital staff resources, creation of digital assets and creation of an evaluation tool. The three strands of delivery focused on:

- increasing school audiences through digital engagement and making a more explicit connection to the curriculum through creation of an interactive performance evaluation tool for teachers and pupils (onTAP); and
- increasing public awareness through improved online content; and strengthened connections with industry delegates accessing the festival digitally.

The Festival reported making good progress towards the proposal's delivery through engaging partners at Dundee Rep, the Scottish Dance Theatre, two primary schools and a Teachers Advisory Group, alongside confirming two Scottish commissions to film in the spring of 2022.

Although the schools' tool was slower in production, the model was beta tested in early 2022, and launched to the arts and education sector in Autumn 2022. Creation of short films received 4,500 views, and forms basis of developing more strategic approach to generating increased family participation. It has enabled the artists to use their digital content to promote their work and secure further business. Digital Delegates were offered a digital programme in the 2022 festival (no participation data in final report).

Edinburgh International Festival

In 2021 the International Festival presented a programme of reduced capacity live events in line with social distancing guidelines. To help maintain engagement with existing audiences and reach new audiences they took a hybrid approach. 14 live performances and 5 commissioned films were available to stream on demand as part of their AT HOME season. There was also an online discussion event in which audience members could put their questions to panellists in real time.

Funding paid for a new digital streaming platform (muse.ai) that integrated with their website and CRM system, supporting fundraising efforts and improving data collection, allowing the International Festival to better understand their digital audiences.

Across all digital events and platforms, the festival reported that they had approximately 20,000 views. 66% of bookers through the muse.ai platform were new to the International Festival's CRM database. Positively, the festival report that 17% of bookers had previously attended the festival but did not attend live events in 2021, suggesting that a hybrid approach was important during the Covid-19 pandemic. The 2021 international audience figures represent a significant increase on 2019 both in terms of countries reached (60 vs 47) and audience share (28% vs 11%).

Edinburgh International Film Festival

EIFF produced six unique events as part of their EIFF Fan Club event series, an online series of conversations between leading Scottish cultural figures with their favourite film star or filmmaker. The festival reported the events were hugely successful, although in the end they recorded two fewer than they initially intended. Through their paid and targeting marketing plan, the festival was able to reach over 500,000 people across various adverts, achieve approximately 10m impressions across their digital and social media platforms, and a 100% increase in their website views, up from 500,000 in 2020.

All told, this resulted in approximately 38,000 online views, with 79% of the target audience under the age of 44. According to their survey of attendees, the EIFF Fan Club had high satisfaction rates and confirmed the festival enabled audiences to see artists and performances they otherwise would not have.

Despite the project helping EIFF to reach new audiences through digital activity and develop new partnerships, unfortunately the festival went into administration in October 2022.

Edinburgh Festival Fringe

The Edinburgh Festival Fringe was able to deliver its plans as they were laid out in the proposal. A significant part of this was the Fringe Player, which hosted 204 digital shows for festival goers to view online. The Fringe reported that they sold approximately 14,000 tickets for online shows to viewers from 67 countries, which was worth approximately £84,000 to the festival. In total, the

Fringe reported holding 941 fringe events, reflecting 512 in-person shows, 414 online shows (204 hosted on the player, and 210 via secure URL access from the fringe website), and 14 hybrid events.

Beyond that, the Fringe was able to deliver full e-ticketing for the first time, with over 395,000 tickets issued during the 2021 festival. Across all the areas that benefitted from the Digital Fringe Project, they reported a total revenue of around £580,000, reflecting an immediate return to investment of 13:1 (DCMS funding represented 23% of the project budget).

Edinburgh's Hogmanay

Due to a series of issues, foremost of which was the imposition of planning restrictions in context of emergence of Omicron virus, Edinburgh's Hogmanay reported making significant changes to their project in their November 2021 interim report. Consequently, they shifted their focus from production and distribution towards commissioning, production, and promotion. The changes meant the festival was aiming to produce a short reflective film including a commissioned poem and soundtrack.

In the interim report, the festival reported that the poem had been produced, the storyboards created, and filming was due to commence in December 2021. We have not received the final report at the time of this evaluation.

Edinburgh Jazz and Blues Festival

In their November 2021 interim report, EJBF indicated that they were making significant changes to their original proposal. Following an assessment of the 2021 festival, they recognised that the interactive element of the original proposal would not add value to the experience of their customers. Instead, they decided to focus on improving digital production quality to ensure audiences had access to high quality sound through the website - expanding their focus from just promotion to promotion and production.

More of the budget was therefore reallocated to programme development and the experiential content that would give customers a deeper engagement with EJBF. The festival wanted to foster meaningful engagement over a longer term, and specifically to create return customers.

The Digital Hub was successfully delivered; over the course of ten days, it featured 15 live streamed concerts, four pre-recorded concerts and a special feature programmed in conjunction with American partners, San Francisco Jazz. It also featured a wide range of special content such as two venue tours, two backstage tours, information about the venues, live sound checks, a series of videos promoting up and coming artists and interviews with staff and artists. The entirety of the content was then available to view and reply for a further 20 days after the end of the 10-day festival period.

In total 14.1k paid for views were recorded. Viewers came from 16 countries including United Kingdom, United States, Australia, France, Italy, Austria, Norway, Ireland, Spain, Germany, Netherlands, Portugal, Denmark, Switzerland, Israel and India.

Edinburgh Science Festival

The 2021 ESF included a mix of in-person and online digital events. In-person events included the sell-out digital art exhibition, 'Elemental', while the online programme included a catalogue of 144 events. The festival did note that these online events were less successful than they initially hoped, subsequently influencing their thinking for the 2022 festival, which they reported would use digital elements to supplement the live in-person experiences.

The 2022 festival did not include a digital programme, although there were digital supplements that attendees were able to download. The festival also included various digital artworks, including a restaging of 'Elemental' and the cancelled 2020 commissions, exhibitions like the 'Datasphere', and the 'Cyberzone' interactive workshop. To promote this, the festival employed a new digital marketing strategy, with online ads that had a combined reach of approximately 853,900. While the audience figures were down on 2019, they were up on 2021, with approximately 9,000 attendees visiting the City Art Centre for the 2020 commissions and approximately 43,900 meaningful engagements with the Datasphere workshop.

Scottish International Storytelling Festival

The challenge, to produce a suite of 12 commissioned digital offers from SISF 2021, using a variety of hybrid approaches, and locations, while delivering consistent quality and accessibility, was met.

In the November 2021 report, SISF reported that they had produced the film for their commissions and had begun the post-production work. Alongside this, they reported that they delivered internal capacity building, a digital engagement programme, and a suite of investments at the library studio which they used to run 10 workshops. SISF launched the full suite of Imagine commissions in online form in the 21/22 New Year, as a showcase.

By the end of project report in May 2022, the Festival indicated that the budget had increased (by £23,656) in order to enhance accessibility (via technical support and BSL) and the final project spend was £87,656.

The Royal Edinburgh Military Tattoo

In their first interim report, REMT reported that they had successfully launched their '*Performance in a new light*' which involved a series of new digital assets focused (i.e. promotional videos) that will be used to expand their reach and access new markets. Part of the performance in a new light programme also involved various PR activity, a social media plan, and a customer relationship management plan.

In November 2021, REMT launched its Show campaign for 2022, developing a full suite of videos to boost the profile of the tattoo. The covid restrictions at the end of 2021 meant they had to adapt the videos they produced, subsequently employing existing film instead of capturing footage of performers but using new production techniques to include a voiceover artist and animation.

Other than the change of direction required, which meant that REMT was unable to focus on performance content, the rest of the project was delivered; key achievements are developing a number of videos, continued engagement with the audience, reaching new markets, and developing the brand in a time where it would otherwise have been unable to engage.

4.6 Delivery

The festivals all reported a positive experience in a number of respects:

- the application and funding approval process was considered straightforward and clear, and the festivals clearly appreciated the role played by Festivals Edinburgh in pulling together the funding and managing the process;
- the festivals were all able to raise the required match funding (as reported earlier) and again the finance aspects were reported as being straightforward; and
- the process for reporting was also positively viewed.

In terms of the delivery of the projects themselves, the festivals all reported that the projects had gone well and had largely delivered against their original expectations. Few major issues were reported, albeit some did report that some aspects had not worked as originally hoped. For example, there were some issues with specific aspects of digital presentation such as captioning which some found diminished the experience (it being less able to capture tone and nuance).

The most significant challenges that the festivals faced fell into four main categories:

- **Costs:** almost all of the festivals reported that digital production was more expensive than they had originally thought. This was due both to the complexity of some of the production work and the festivals' commitment to producing work of the highest quality. While the funding provided by the Digital Expo Accelerator programme was considered sufficient (only one festival exceeded the budget), and some income generation was achieved (discussed below), all of the festivals felt that a commercially sustainable model for digital was some way off.
- **Quality:** one of the key challenges lay in developing and presenting work digitally that could offer a sufficiently high-quality audience experience. This involved considerable adaptation and response to audience feedback. For example, EJBF dropped interactive functions from their digital venue project as the audience found these elements less

engaging. EIBF invested considerable thought and effort into trying to develop a parity of experience between the real life and digital audiences.

- **Digital Fatigue:** heading into 2021 there was a feeling that the market for digital content and events was saturated and that with people working from home and using tools like Zoom and Teams, there was some digital fatigue. This required the festivals to think even harder about how their digital content would engage audiences in what was quite a challenging environment, not least with the return of at least some live events and audiences.
- **Mindset:** some of the festivals spoke of the challenge in shifting mindsets within organisations that had hitherto been focussed on producing a live event. It is difficult to know the extent to which such shifts had been achieved but thinking digitally was noted by many as a journey. Ultimately, this may reflect the extent to which digital is considered an add on to the main live festival or becomes more integrated. It is too early to say with confidence how this will play out across the festivals. We return to this issue below.

4.7 Outcomes

These are the longer-term consequences resulting from the intervention and show progress against strategic objectives. While outputs can be measured at the point of completion of the activity, outcomes generally take longer to come to fruition.

As far as possible we have linked the outcomes back to the main objectives of Digital Expo, below.

4.7.1 Commissioning

Four Festivals (**EAF, EIBF, ESF, SISF**) targeted commissioning in their proposals. All of these commissions were successfully achieved. They have led to new ongoing partnerships (e.g., **EIBF** with Lyceum Theatre), innovations in accessibility (e.g., **SISF**'s ground breaking work with the deaf community), new programme content (e.g., **ESF**'s use of digital technology to help workshop attendees explore cybersecurity and to produce digital artworks) and built capacity and learning from transferring skills into in-house teams.

Table 4.5: Commissioning Outcomes

Objective: seize the opportunities of creative commissioning in the digital sphere	
Fest	Reported Outcomes

EAF	<ul style="list-style-type: none"> Commissioning artists has enabled a more professional standard of media production and output than previously possible.
EIBF	<ul style="list-style-type: none"> Successful commissioning partnership with Lyceum to bring hybrid events to real-life and online audiences.
ESF	<ul style="list-style-type: none"> Digital artworks and workshops on digital themes have been incorporated into the live programme.
SISF	<ul style="list-style-type: none"> From commissioning 12 accessible films using deaf performers, voice and interpretation, gained experience and understanding of resource implications and built networks.

4.7.2 Production

Most of the Festivals targeted production, with the **EJBF** adding a focus on production during the project. Outcomes are discussed in **Table 3.6** below.

The funding has enabled the festivals to build up capacity, experiment creatively with digital techniques and develop new production styles. **EAF** has used digital technologies such as livestreaming and video technologies embedded within physical artworks, while **REMT** used the funding to blend animation and voice over into existing film footage to enhance the product. Others, such as **EIBF** used the funding to develop and experiment with hybrid production that worked well for live and online audiences. **SISF** focused on improving accessibility to deaf audiences.

Table 4.6: Production Outcomes

Objective: meet the unique production demands associated with high quality digital work	
Fest	Reported Outcomes
EAF	<ul style="list-style-type: none"> Creative experimentation in production, including livestreaming and use of video technologies to enhance physical artworks and projects. Proved its capacity for hybrid delivery, informing future strategy around access, timing and structure of online and in-person events.

	<ul style="list-style-type: none"> Will build learning into future festivals, particularly around captioning, video description and BSL interpretation.
EIBF	<ul style="list-style-type: none"> Innovative, bespoke hybrid production set up that worked well for both audiences, attracting interest from other organisations to share learning. Increased partnership around hybrid delivery with Lyceum Theatre and University of Edinburgh.
EFF	<ul style="list-style-type: none"> Fringe Connect will remain a year-round platform for events, information and networking and all content from 2021 is retained on the platform for newly registered Fringe participants to engage with, a lasting legacy of this support.
EJBF	<ul style="list-style-type: none"> Creation of high-level digital output for the Creative Hub.
ESF	<ul style="list-style-type: none"> Improved production capacity and techniques over two years.
SISF	<ul style="list-style-type: none"> Built capacity around how to incorporate accessibility into production processes.
REMT	<ul style="list-style-type: none"> Developed new innovative digital production style using animation and voice over to promote the festival. Techniques will be deployed again in future festivals.

4.7.3 Distribution

Some festivals chose to build bespoke distribution platforms (**EFF, EIF**), with mixed results. The advantages have been building greater insights into audience behaviours and profiles, but, visibility and therefore audience numbers have been an issue. **EFF, REMT and SISF** also achieved developments in terms of using other digital platforms such as YouTube, zoom or vimeo for audience engagement and programme distribution.

Table 4.7: Distribution Outcomes

Objective: address the challenges and complexities of digital distribution platforms	
Fest	Reported Outcomes

EIF	<ul style="list-style-type: none"> • New platform developed which generated greater audience insights than achievable through social media platforms. • The digital platform enabled increased schools' participation and new connections with schools Scotland-wide.
EFF	<ul style="list-style-type: none"> • The development and delivery of a new platform (Fringe Player) was the most significant outcome and was entirely new for 2022. • The development of secure payment and URL access for a range of other digital platforms (such as zoom or vimeo) allowed Fringe participants to engage in a way that suited their work and retained the open access principle of the Fringe.
ESF	<ul style="list-style-type: none"> • Developments in digital advertising on social media, with more targeted event ads.
SISF	<ul style="list-style-type: none"> • Distributed full suite of commissions online, as a festival showcase. Continued global online platform in 2022 (via YouTube).
REMT	<ul style="list-style-type: none"> • Explored new digital channels including video on demand. Better understanding of targeting and reaching new audiences.

4.7.4 Promotion

A number of festivals (e.g., **EICF**, **REMT**) produced digital marketing assets that can continue to be used for future promotional activities. Some have worked strategically to incorporate digital marketing and digital audience development plans (e.g., **EICF**, **ESF**, **SISF**). The **EFF** has developed a long-term digital ticketing solution and **ESF** plans to work on this in future.

While promotion was not a main focus of the **EAF**, they have achieved progress in terms of promoting the festival to wider audiences using digital technologies. Assets created will help the festival to develop its profile and partnerships in future. Through the project, **ESF** has recognised that it needs to invest more in digital marketing and its website to make it more user-friendly.

Table 4.8: Promotion Outcomes

Objective: enhance the reach and engagement of creative work through new approaches to digital promotion

Fest	Reported Outcomes
EAF	<ul style="list-style-type: none"> • Raised profile of festival - expanding geographic reach and reach to audiences with access requirements. • Resources created in the project will assist the festival in the longer term across fundraising and development, using the portfolio of assets as a case for future investment, better pitching to broadcast media for future partnerships.
EICF	<ul style="list-style-type: none"> • Creation of onTAP tool provides digital metrics on uptake and hopefully increased schools audiences. • Films will be used for ongoing promotion of future festivals. • In process of developing a Digital Strategy based on learning; secured further funding for continued employment of Digital Content Producer and increased role of Digital Marketing Coordinator.
EFF	<ul style="list-style-type: none"> • Proved that audiences are willing to pay for work presented online (with 14k tickets sold). • Created a long-term e-ticketing solution that will save both money and operational capacity in future years. • Income from commission and handling fees was 63% higher than projected in the budget and the number of shows registered was over double the volume expected.
EJBF	<ul style="list-style-type: none"> • Better understanding of target digital audience. Learning that digital audiences require a unique audience development plan. • Hub will help to showcase the festival to new audiences, funders, partners, etc. • New collaborative partnership with SFJazz, with long-term ambitions to pursue international livestreaming. • Increased accessibility to multiple audiences and profile of organisation.
ESF	<ul style="list-style-type: none"> • For first time in 2021, developed a digital sales strategy within marketing campaign. Understanding of unique benefits of digital alongside traditional marketing.

	<ul style="list-style-type: none"> • Learning around digital marketing improvements required, e.g., user experience on buying tickets, outdated website technologies – to be built on in future.
SISF	<ul style="list-style-type: none"> • The marketing effort has diversified and widened to support the diversity of media and audiences utilised in 2021.
REMT	<ul style="list-style-type: none"> • Brand development with new local sponsorship, using digital production techniques to tell the story of the Tattoo.

4.7.5 Skills Development

A fifth key outcome has been the development of skills and capacity, in house and in some cases also with external partners. The skills outcomes are summarised in **Table 3.9**.

The funding has provided the opportunity for festivals to bring in expertise, which in some cases has led to transfer of skills, building capacity for future projects (e.g., **EAF, SISF**) and has also built understanding in what is required in digital commissioning (e.g., **ESF**). Some festivals (e.g., **EIBF, EFF, EJBF**) reported that they had built multi-disciplinary teams thereby sharing learning across the organisation in applying digital technology for hybrid events and in **EIF**'s case this learning has been shared with other festivals.

Table 4.9: Skills Outcomes

Objective: develop skills and capacities in digital technologies	
Fest	Reported Outcomes
EAF	<ul style="list-style-type: none"> • New skills leading to employment for some of the Community Wellbeing Collective. • New skills and understanding of media production among core staff.
EICF	<ul style="list-style-type: none"> • Learning around building and maintaining audiences year-round through digital.
EIBF	<ul style="list-style-type: none"> • A new multi-disciplinary team has developed capacity, and the future direction of hybrid events will be determined within an emerging new organisational strategy.

	<ul style="list-style-type: none"> Increased organisational understanding of how to produce and broadcast performance for live and online audiences.
EIF	<ul style="list-style-type: none"> Staff have an increased knowledge of creating digital specific content as well as editing live captured events and using a digital platform. Learning and engagement team have widened schools access through digital content and platform. Sharing learning of using the digital platform with other festivals.
EFF	<ul style="list-style-type: none"> New digital skills across organisation. In-house capacity to process digital video content. New cross-departmental working model for digital projects.
EJBF	<ul style="list-style-type: none"> Upskilling in digital programming and the logistics of how to marry a tailored digital programme on top of the practicalities of scheduling and delivering live events. Every core team member played a part in the projects delivery and gained greater understanding about other team members digital roles and responsibilities. Increased productivity.
ESF	<ul style="list-style-type: none"> Project helped Festival to begin embedding knowledge and good working practice and digital capabilities in the organisation. Enhanced skills in digital commissioning and working with digital creatives, which will be continued in future years, while also building up staff skills to create more content in-house. Aim to undertake a digital skills audit with appointment of new Skills Manager, to build on learning achieved.
SISF	<ul style="list-style-type: none"> Strengthened technical and creative capacities through partnerships and the involvement of the whole SISF team. Obtained learning around capacity, scales, purpose and delivery of storytelling in digital form. Identified need to build additional producing capacity through networks and partnerships

REMT	<ul style="list-style-type: none"> • New skills -marketing, improved creative digital video editing techniques.
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4.8 Outcomes and Benefits

In the preceding section we have compiled the outcomes reported by the festivals in relation to what was expected in their applications. Here we discuss some of these in more detail, drawing on the project reports but mainly on the consultation discussions with each of the festivals.

In line with the logic model (see **Section 2.2**) we considered outcomes in five main areas:

- Developing digital capabilities;
- Commissioning/producing new digital work;
- Reputational benefits;
- Income; and
- Engaging existing and new audiences.

Digital Skills and Capabilities

All of the festivals reported significant learning benefits as a result of the Digital Expo Accelerator projects, and this may in fact turn out to be the programme's most significant legacy (discussed below).

As noted above, the timing of the funding was such that most of the festivals (with the exception of the REMT) had already had to adapt to the pandemic and attempt to stage some form of online event during the initial lockdown periods. For many, this exposed critical gaps in their knowledge and capabilities regarding digital, and the Digital Expo Accelerator fund provided an invaluable opportunity to address these gaps.

All of the festivals made use of external expertise. EICF and EAF each employed a Digital Producer (EAF subsequently extended this contract and hopes to continue) and the others worked with external freelancers and/or agencies with expertise in digital production, digital marketing, filmmaking and sound production. This is in addition to commissioned work from artists.

The festivals also made sure that their own staff were closely involved throughout and in commissioning work and engaging external providers. This ensured a high degree of knowledge transfer, and all of the festivals reported that staff knowledge, skills and confidence had grown significantly. Some of the specific areas in which knowledge and skills benefits were reported included:

- Commissioning digital art;

- Filming for digital presentation;
- Captioning and audio and visual description, BSL, etc. for digital work;
- Planning digital, marketing campaigns;
- Understanding digital platforms and channels;
- Budgeting digital production; and
- Using digital for education and audience engagement.

New Work

Not all of the festivals sought to commission new digital work although most did develop digital content via live streaming (or recording) or already commissioned or booked events/performances. Those that did commission digital content typically reported learning benefits in the form of greater understanding of how digital content is produced and consumed in different ways. Importantly, this understanding extends to how audiences engage with digital work, and how digital can integrate with live events in hybrid formats.

Reputation

Edinburgh's Festivals already enjoy a very strong global reputation, and all reported that the ability to stage digital and hybrid events of a high quality through the pandemic years had further enhanced this reputation. EIBF also reported generating considerable interest from other festivals and events wishing to learn from their experience of staging a hybrid festival.

The international reach of the Digital Expo Accelerator projects will also have helped with their wider reputation.

Income

While the generation of income was not a core objective for all of the Digital Expo Accelerator projects, there are nonetheless some interesting findings in this respect.

The programme itself generated income in the form of leverage of additional funds. As reported previously, this included sponsorship, other public sector funding and investment from the festivals themselves.

Some of the festivals (e.g., ESF, EH, EAF, EIFF and EICF) offered their digital content for free and while others adopted either a pay what you can (PWYC) or a fully paid model. Over 14,000 people paid to access Fringe content via the Fringe Player, generating ticket income of around £84,000. While this remains modest compared to general ticket income (c. £3m), the Fringe Society reported that the total income attached to services enhanced by the Digital Expo Accelerator funding was £580,000, a return of £13 for each £1 of funding.

EJBF also had around 14,000 people paying to access digital content (a one-off payment of £10) and the Book Festival's digital audience paid on a PWYC basis. EIF offered the content on a donation basis and raised just over £8,000 in this way.

Across the board, direct income generation was modest, and all of the festivals agreed that a financially viable model for digital events was unlikely given the costs of production and uncertainty regarding the willingness and ability of audiences to pay for digital content. None of the festivals really explored some of the business models already prevalent in the digital space such as advertising, data or subscriptions (although the EJBF model was arguably a subscription). This could be a useful focus for future funding, although some of these commercial models (e.g., advertising) might be considered to be at odds with the ethos of the festivals.

It is worth noting that the viability of the digital events has been improved (if not resolved altogether) by the investments into technology, systems and platforms enabled by the Digital Expo Accelerator funds, and this is a legacy discussed in more detail below.

Of course, sponsorship income was generated, most notably by EIF which secured significant investment from abrdn. abrdn is a global brand seeking international reach at scale, and the EIF Muse.ai did not deliver large numbers of views in the way that existing platforms would. This is currently under review by EIF, and it could be that the value of sponsorship income outweighs the benefits of the bespoke platform. Other aspects of the Digital Expo Accelerator projects, for example, the Fringe Connect platform for artists, could in future attract sponsorship.

Audience Engagement

As noted, expectations regarding audience numbers were relatively modest at the outset and none of the festivals expected to generate huge audiences through digital only channels. Covid rules, and the impacts on audience behaviour, remained highly uncertain throughout 2021 and the festivals mainly delivered hybrid events (with the exception of REMT which did not take place at all in 2021). The same was true to some extent in 2022, making both highly untypical years. As such, audience numbers themselves tell us little given the lack of context, so we have focussed here on the more qualitative findings regarding the extent to which the Digital Expo Accelerator projects enabled the festivals to reach and engage new and existing audiences.

Most of the festivals reported modest online audiences apart from the Book Festival and the Fringe, both of which attracted strong online audiences relative to the others, even if these were still smaller than those for the live events. EAF and EIF, for example, both fell some way short of their audience targets for digital presentations. In the case of the latter, this was a result of the decision to use a bespoke platform within the EIF website (Muse.ai) rather than existing platforms such as YouTube where previous content had attracted large numbers of views. This decision was taken to allow EIF to gather more detailed audience data but ultimately limited the reach of the digital work.

Despite these issues, the reported audience data suggests that what the digital elements did do was attract audiences that would not otherwise have attended, due either to geography (and/or travel restrictions) or other barriers. For example, in a survey of EFF attendees, 53% said that they would not have been able to experience the Fringe without online performances (Fringe Player).

The festivals also consistently reported a more international audience online than at the live events, even for those with already strong international audiences. Edinburgh International Festival for example has a strong international audience and reported that online viewers came from 60 countries against an original target of achieving viewers from 20 countries. Similarly, festivals such as the Science Festival and the Jazz and Blues Festival, that tend to have a more local audience, also reported that the digital presentations enabled them to reach across a far wider geography, including internationally.

Many also reported strong performance in relation to new bookers (i.e., those that had not previously attended the festival). 60% of EIBF's online audience did not previously have an account with the festival and 66% of the International Festival's digital viewers were new bookers.

Finally, it is important to note that the digital work allowed many of the festivals to present work outwith the period of the festivals themselves. This was a first, for example, for EIF (which was presenting work September to January) and EJBF has since held a digital weekend event (Autumn 2022). Other festivals including SISF also continued to present digital work outwith the festival dates. This has allowed these festivals to reach beyond their traditional in-person audience.

What these findings start to suggest is that while digital presentations did not always attract large audiences (relative to the live events), they did attract audiences that for a variety of reasons would not otherwise have attended the festivals. This starts to suggest the future potential of digital as a means for aching new audiences, perhaps more than adding further to existing audiences. We return to this issue below.

Importantly, many also commented on the extent to which the experience of working on the Digital Expo Accelerator projects had started to shift mindsets around digital. As noted earlier, organisations such as the Fringe Society and the Book Festival were already on a digital transformation journey, while others had less of an explicit focus on digital prior to the pandemic. All have now changed their thinking around the role that digital could play in the future of the festivals, and this is a substantial impact of the programme.

Specific Issues

Although arts policy is a devolved matter, funding for the Digital Expo Accelerator came from the UK Government Department for Culture, Media and Sport (DCMS). Some of the festivals have an existing relationship with the DCMS on the basis of the international importance of Edinburgh's Festivals and their importance in areas like export, cultural diplomacy and soft power.

As noted earlier, the Digital Expo Accelerator projects have reached out to international audiences, and indeed have both engaged new international audiences (for those festivals playing largely to local audiences) and reached further (for those with an existing international reach). Although somewhat indirect, this nonetheless implies some soft power benefits or at least positive reputational gains for the UK.

The delegate programmes run by a number of the festivals (in particular EICF and EFF) are also important marketplaces for UK culture as well as delivering soft power benefits. Both EICF and the Fringe delegate programmes benefitted from the DCMS support, albeit more so via the Digital Marketplace funding (covered in Section 3).

Similarly, any export benefits are more likely to arise from the Marketplace than the Digital Expo Accelerator projects and this is discussed in more detail in Section 3.

Finally, the UK Government is also interested in the extent to which the projects may have delivered benefit to high priority Levelling Up local authority areas. The EDC programme has clearly delivered benefits in the form of employment, contracts and opportunities for artists, freelancers and companies across Scotland. Whether, and where, it may have done similar for other parts of the UK is less clear. In terms of audience reach, the digital presentation of work across the festivals will undoubtedly have engaged people from across the UK. Understanding impacts in Levelling Up areas was not part of the original criteria, and the data are not available to analyse this in the required level of detail to identify which Levelling Up areas are represented and to what extent. It may be that the Digital Marketplace again offers opportunities to companies from other parts of the UK, and this is discussed in Section 3.

In terms of audience reach, the digital presentation of work across the festivals will undoubtedly have engaged people from across the UK, but the data are not available to analyse this in the required level of detail to identify which Levelling Up areas are represented and to what extent.

4.9 Impacts and Legacies

Consultation with the festivals identified longer term impacts and legacies in two main areas:

- Digital systems and platforms; and
- Digital capabilities.

Systems and Platforms

A number of the festivals used Digital Expo Accelerator funding to invest in new or upgrade existing digital systems and platforms, and all created new digital assets. This includes:

- EIBF: a range of equipment including cameras and screens to support filming and presentation for digital and hybrid events;
- EJBF: the Digital Hub platform for presenting content;
- EFF: Fringe Player and Fringe Connect platforms and e-ticketing system;
- EIF: Muse.ai platform and upgrades to CRM system;
- EICF: OnTAP digital programme and resources for schools and learners;
- SISF: gaps in digital infrastructure addressed; and
- All: various digital assets including new work, recorded performances, promotional content and educational content.

These investments provide a number of the festivals with significant enhanced capacity for digital working, and many noted that they will continue to use these systems, platform and assets in the future.

Digital Capabilities

As discussed above, all of the festivals have substantially increased their skills and knowledge of digital working. The Digital Expo Accelerator programme has also accelerated their push into the digital space and has led in many cases to quite significant shifts in how the festivals think about digital. For some, digital was previously something that they felt they should do at some point, or was a promotional tool, but digital is now seen by all of the festivals and something more integral to the future of the events. This is a very clear and marked shift and one that is likely to see continued investment and development of the digital aspects of the festivals.

Of course, some of this must also be attributed to the pandemic, which effectively forced the festivals into working digitally (as it did businesses and organisations across the world) although there is no doubt that the Digital Expo Accelerator fund has helped to accelerate and improve their digital skills, knowledge and working across multiple areas of the festival's activities. This, along with the digital platforms systems and tools is the fundamental legacy of the Programme.

4.10 Counterfactual

In the consultations with each of the festivals they were asked what would have happened without the support of the Digital Expo Accelerator and in every case, they were clear that while they would have done some work in the digital space, it would not have been on the same scale or of the same quality without the DCMS funding. It would not have been possible for example, for the festivals to engage external expertise to the same extent (or even at all) and investment into digital systems and platforms would have been far more difficult to achieve. Perhaps even more importantly, the Digital Expo Accelerator allowed the festivals to experiment, and to test audience appetite for

different kinds of digital engagement and content. This has certainly informed their future planning around digital, as discussed below.

4.11 Future Plans

As noted above, both EIBF and EFF were already committed to incorporating various aspects of digital working into their activities. EIBF reported being committed to delivering hybrid festivals in the future, but there have since been reports that ongoing financial pressures as a result both of the pandemic and the current cost of living have led the organisation to scale back and drop live streaming⁹. Notably, these reports also highlighted that income was down 40% compared to the full live events per pandemic, again underlining the challenging economics of digital or hybrid festivals.

EJBF has also indicated a commitment to continuing with digital presentation of performances and related content and is looking, for example, into live streaming performances from elsewhere in the world. This is being tested through a new relationship with SF Jazz in the US.

The Fringe Society has decided not to prioritise the Fringe Player for now, on the basis of doubts about audience appetite for a digital Fringe now that full scale live events are again feasible. It is, however, fully committed to the e-ticketing platform and to Fringe Connect, continuing to use and even develop the systems and platforms developed with Digital Expo Accelerator funding.

EIF is currently reviewing its digital future, in particular whether to use again the muse.ai platform or return to the more established platforms with wider reach. With a new festival director now in post it is not yet clear how this will develop in future.

EAF, EICF, ESF and SISF all intend to continue to use the digital assets, relationships and knowledge developed through the Digital Expo Accelerator programme to deliver aspects of digital programming in the future, including further commissioning of digital work.

REMT has significantly developed its digital marketing and will apply the learning and assets in future campaigns and to support the delivery of the event itself.

The future of digital as part of the EH is not clear and Underbelly (the delivery partner for Hogmanay at the time of the Digital Expo Accelerator programme) did not take part in the evaluation consultations.

Finally, during the study period, the sad news broke that the Centre for the Moving Image, which owns and runs EIFF, had gone into administration. As a result, the future of EIFF is highly uncertain.

⁹ [Edinburgh International Book Festival to cut jobs, scale back programme and drop live-streaming | Edinburgh News \(scotsman.com\)](https://www.scotsman.com/news/edinburgh-international-book-festival-to-cut-jobs-scale-back-programme-and-drop-live-streaming-1.5000000)

This, and the example of EIBF above, both provide a stark illustration of the very challenging issues facing the cultural sector just now. Financial damage as a result of the pandemic is being compounded by rapidly increasing costs (staff, energy, supplies etc.), downward pressure on public sector budgets and lower than expected audiences for many events. This is a perfect storm which is creating a genuinely existential threat to parts of the sector.

5 Conclusions

5.1 Introduction

The objective of the evaluation was to assess the impacts of the Enhancing Digital Capabilities (EDC) funding on the eleven festivals in Edinburgh. In particular, we have focussed on the impacts of the funding in four main areas:

- the digital skills and capabilities of the festivals to harness the potential of digital in delivering major cultural events;
- the extent to which the activities supported by the funding have helped to maintain and/or enhance the reputation of the festivals;
- the potential of the activities supported to deliver economic benefits and impacts, including increased exports of UK cultural product; and
- the engagement of new and existing audiences with digital content.

In so doing, we have taken a mainly qualitative approach as requested in the study brief. We have also offered some thoughts on key lessons arising from the programme and the possible future application of digital across the festivals.

5.2 Digital Skills and Capabilities

To a significant extent, the development of digital skills and capabilities was the primary objective of the EDC programme, and our conclusion is that this objective has been met.

All of the festivals reported very substantial gains in their knowledge and skills relating to digital, even those already involved to some extent in digital working. While some of these gains may be attributable to the experience of the pandemic, the EDC funding has allowed the festivals both to experiment further and to engage appropriate expertise, both externally via contracting and via recruitment internally, to develop their knowledge. There is also evidence of shifts in how the festival organisations view and consider digital working, with these shifts typically towards a more strategic outlook and one that considers the digital aspects of the festivals from the outset rather than as an add-on or an emergency response to external circumstances (i.e., Covid lockdowns).

In relation to digital capability, the funding has also helped to develop the digital infrastructure within the festivals, in some cases very significantly. Platforms such as the Fringe Marketplace, Fringe Player, Fringe Connect, the EJBF Digital Hub and EIF's muse.ai platform are all there are waiting to be used again in future, depending on the digital plans for the respective festivals.

Similarly, the Fringe's e-ticketing technology and the improvements made to existing systems in EICF, SISF and EIF, along with new equipment (e.g., EIBF) are all important legacies that will support future digital work. They will also reduce the costs of such to the festivals.

Thus, the EDC funding has left all of the festivals in a far stronger position regarding digital working than they would otherwise have been.

5.3 Reputation

While assessing the extent to which the EDC Programme has improved the reputation of the festivals is difficult, there are a number of positive indications:

- the festivals all reported a positive experience and positive feedback from audiences that engaged with the digital work;
- there was clearly a strong focus throughout on producing digital content of a quality commensurate with the high standards of the festivals;
- the extent to which the festivals were able to reach out internationally and to reach new audiences is positive and should have reputational benefits;
- other festivals and events have reportedly contacted the festivals (in particular the Book Festival) to learn from their experience of staging a hybrid event – this is a clear indicator of reputational benefit; and
- the very fact that the festivals were able to continue to engage their audiences through the most challenging phases of the pandemic must again deliver reputational benefits.

5.4 Economic Benefit

The economic benefits arising from the Digital Expo Accelerator funding are modest and indeed the Digital Marketplace is arguably the element that has greatest potential to deliver economic impact.

The financial leverage achieved by the Digital Expo Accelerator fund was strong at 59% of total costs, far exceeding the 10% match funding target set at the outset. In terms of income generation, while the digital events did raise some ticket income, this was generally modest and in some cases was not a priority for the festivals (e.g., where access was offered free or on a PWYC basis). Importantly, the costs of producing digital content of sufficient quality tended to outweigh the income potential, at least for most, casting some doubt on the economic viability of digital events and festivals.

It is also worth noting that some of the festivals will have realised some efficiency gains as a result of their digital activities, for example in areas like ticketing and marketing. With the sunk cost of digital infrastructure in these areas, future efficiency gains may well increase.

Of course, all of the benefits achieved by the Digital Expo Accelerator fund may in time deliver some economic gains for the festivals through, for example, expanded audiences, access to new content, improved marketing and enhanced digital skills and capabilities. It is, however, too early to assess this.

The evidence relating to economic impacts arising from the Digital Marketplace is also somewhat limited at this time. Marketplace users have been booking shows, and some are in the process of doing so, but it is not clear that this is directly attributable to the Marketplace, even if it has likely played a role. This should not be considered a negative finding, and users across all user categories were positive about the experience of using Marketplace and it is likely that many will continue to do so between as well as during festivals. What is needed is a more effective way of tracking booking and commissioning activity through the Digital Marketplace (and at the festival itself) to gain a more complete picture of the economic impacts.

5.5 Audience Engagement

As discussed earlier, assessing audience numbers over the period of the Programme is problematic as a result of the circumstances at the time. Most of the festivals were still operating in a highly uncertain environment regarding the pandemic and staging mostly hybrid events. Audience intentions were (and remain) highly uncertain and for many live audiences were lower than expected.

Many of the festivals, with the notable exceptions of the EFF and EIBF (and possibly EJBF) attracted modest audiences to the digital provision. In some cases, audience numbers were lower than originally forecast in the EDC applications.

The more important finding is that all of the festivals attracted new audiences, and audiences that would otherwise not have been able to experience the festivals due either to geography (and travel restrictions) or other barriers.

International audiences were strongly represented, even for festivals that would normally have a more local audience, and the festivals worked hard to make digital presentations as accessible as possible with use of live captioning, visual description and BSL.

Those festivals that reported audience data also reported a high proportion of new bookers coming to the digital events, suggesting that the digital provision is reaching audiences new to the festival(s).

These are all important impacts.

However, as discussed, the festivals are and will remain fundamentally live events and none of the festivals would consider digital a replacement for this. The role that digital might play in future is more one of enhancing the live events and extending engagement to those that would otherwise not be able to attend.

It is worth noting that there was strong engagement with digital content from the arts industry, both through the Fringe Society's Digital Marketplace and EICF's delegate programme. The Marketplace attracted strong industry interest, even as most users also attended the festival in-person. This suggests that the Marketplace has an added value role for industry attendees, for example in helping them to identify shows to see and allowing them to focus what is often limited time.

Overall, our conclusion here is that the EDC has enabled the festivals to reach new and diverse audiences, including a strong international audience and an industry audience, even if the overall scale of the digital audience remains small compared to that of the live events.

5.6 Counterfactual

It is worth briefly considering what would have happened without the investment from DCMS. Without doubt all of the festivals would have delivered something digitally, particularly when live events were not possible, but this would have been on a smaller scale and of a lower overall quality without the DCMS funding.

Some would have continued to use digital at the margins rather than thinking strategically about how it can enhance their work, and few would have been able to experiment with and develop the same range of digital assets, platforms and systems. This includes the platforms such as muse.ai, Fringe Player and the Jazz and Blues Hub as well as systems such as EFF's e-ticketing, EIF's CRM and EICF's online booking systems. While some of the festivals were planning upgrades of some digital systems, these would not have proceeded at the same pace nor to the same level of quality without the investment. Similarly, the festivals would not have been in a position to develop the digital resources and tools that supported outreach work with communities and schools.

Few would have been in a position to engage external digital expertise in the way that they did, and these partnerships would not have been developed.

Above all, while some digital activity would certainly have taken place, the festivals would not have had the same opportunity to experiment, take risks and innovate with digital technology in the way that they did with the DCMS support. As a result, the outputs would not have been so impressive and the learning so deep and embedded within the festival organisations.

5.7 Future Outlook

As discussed in the preceding section, digital working in some shape or form will remain a feature across the festivals. For some, digital events and the presentation of digital work will continue and for others there will be more of a focus on digital marketing and on systems and platforms that deliver efficiencies and/or improve audience experiences.

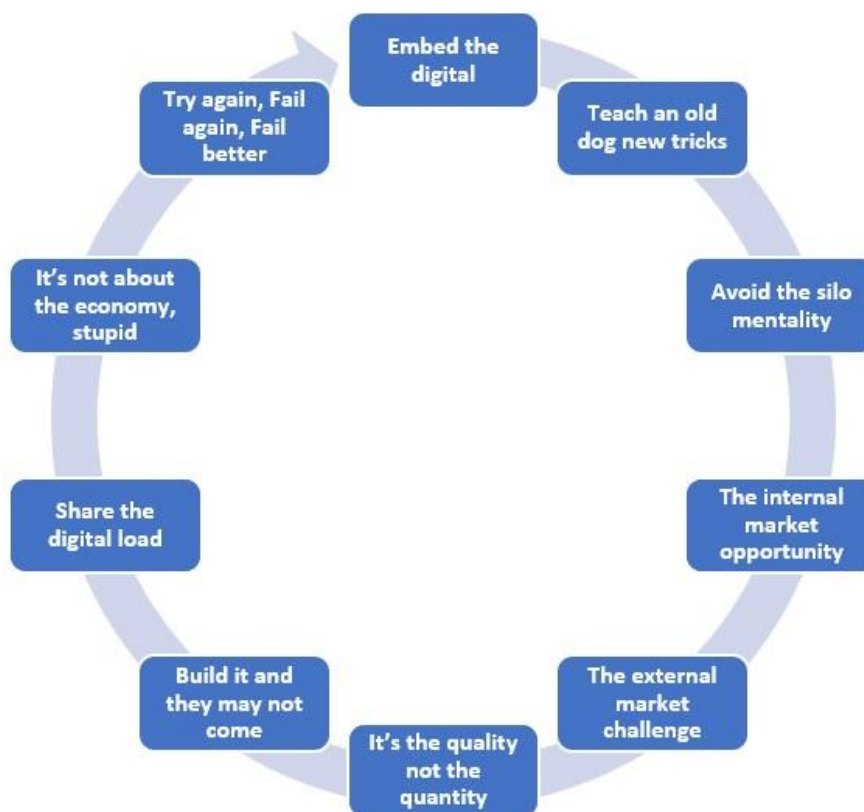
The Programme has clearly improved digital capabilities and has also helped to clarify for the festivals the potential role that digital may play in future delivery. Digital will not replace live events but will instead enhance the festival experience with a likely focus on reaching audiences that would not otherwise be able to attend. Quality is critical, and the costs of producing high quality digital work and experiences is higher than most envisaged. This is also important learning.

In particular, it is clear that digital is unlikely to be a major source of revenue for the festivals, at least not via direct ticket sales. Some sponsorship opportunities are possible, but digital should not be viewed as an easy means of generating income.

More widely, as noted earlier, the cultural sector faces enormous challenges with rising costs, uncertain audiences and downward pressure on public funding. EIFF is already in administration and EIBF is reviewing operations, leading to a scaling back of digital ambitions. In such difficult conditions, digital may be an easy area to cut, and the future scale of digital working across the festivals remain to be seen. In light of the success of the EDC Programme, it would be worth considering a follow up scheme to protect the gains to date and enable the festivals to continue to explore the ways in which digital working can enhance and improve their wider offer.

6 Postscript: Shared Learnings

The EDC Programme has enabled Edinburgh’s festivals to experiment with digital working in ways that would not otherwise have been possible. In so doing, their experiences highlight a number of learnings with wider applicability across the cultural sector. These are outlined below.



6.1 Embed the Digital

If digital thinking and practice is to become truly valuable in shaping the future of an organisation, it has to move from the periphery to the centre of organisational strategy. One of the most significant shifts across the Edinburgh Festivals landscape was that digital working changed from being an activity at the margins, mainly for promotional purposes, to something more embedded at a strategic level within the organisations. This came about through greater understanding and experience of how digital working can deliver across a host of core corporate objectives related to creation, production, distribution, and promotion.

Embedding digital does not of course mean embracing a ‘fully’ digital future. The nature and extent of digital working will be a strategic choice for each organisation, and it should be one that is considered as a core part of organisational strategy and not as an afterthought.

6.2 Teach an old dog new tricks

Too often digital is seen as the remit of the marketing team, and often junior members of that team, rather than senior management. This limits the potential impacts and benefits of digital working and mitigates against the more strategic approach outlined above. Gaps in senior management digital skills and knowledge can make decision-making more difficult, preventing organisations from innovating and delivering value in creative, operational, audience and marketing terms. The commitment to digital working by senior leaders across the Edinburgh Festivals was crucial to the success of this programme of work, with many remarking on the need to acknowledge their skills weaknesses as a crucial element in not only the development of the organisation but also to rethinking their own personal development plans. One manager even remarked that the programme had crucially given the lie to the old adage that you can’t teach an old dog new tricks.

6.3 Avoid the silo mentality

In business, organisational silos refer to the situation that occurs when team members from different departments do not share important information or processes with other members because they are that isolated, exclusive, or remote. This lack of knowledge sharing can impact workplace productivity and result in collaboration failures. A business structure like this leads to a silo mentality. Each of the Edinburgh Festivals sought to maximise the opportunity of this programme by involving different members of staff from across different departments in the process rather than relying on one person alone (as can often be the case with digital projects). In various cases, a full team was developed, involving both internal staff and external partners, to support the delivery of digital programmes. This not only allowed multiple perspectives to be brought to the work, but also embedded the learning more widely within the organisation.

6.4 The internal market opportunity

Too often when organisations refer to digital strategy it is shorthand for audience-focussed online activities, a tendency which was exacerbated during the pandemic when most organisations moved in to live streaming. However, a true digital strategy will reach across an entire organisation, identifying challenges which can be addressed through digital developments. Such developments

often bring with them an internal market opportunity in that they provide moments to create efficiencies in operational practices through digital interventions. During this programme the Edinburgh Festivals identified relevant opportunities for such efficiency savings, with the development of integrated e-ticketing, booking systems and CRM (i.e. Customer Relationship Management) programmes being obvious examples where the use or improvement of digital systems delivered real value both to the organisation through saving costs and enhancing customer data and the audience through improved communication and booking experience.

6.5 The external market challenge

During the pandemic, there was an immediate shift to producing and distributing work online, with many organisations expecting a lucrative new income stream to result. However, one of the first issues that became clear to such organisations was that, without realising it, they had just entered a very crowded competitive marketplace where their offer would have to fight for audiences and revenue alongside major players with much larger resources – in a market where the normal geographic restrictions for audiences seeing an event had been removed. The need to identify their unique selling proposition [USP] became even greater in this brave new digital world. For the Edinburgh Festivals this realisation brought a lot of soul searching and a degree of clarity about their fundamental USP being extraordinary in-person communal experiences – and that as such, they should not try to replicate everything in digital form but rather be very clear about those areas in which digital developments could enhance their offer rather than diminish it.

6.6 It's the quality not the quantity

The common perception is that digital is cheaper and that content can, and should, be created and distributed regularly. During the pandemic period all organisations pivoted swiftly to such a digital distribution model, being seen as the only way in which they could provide work for artists and shows for audiences. However, as we emerged from that period it was clear that audience behaviour was changing and that they were no longer satisfied to watch content of an inferior quality. This change was already evident even during the pandemic, where the initial bubble of online quizzes and fitness classes quickly burst, and the quality threshold for long-form content has now firmly asserted itself. The reputation of Edinburgh's Festivals is rightly dependent on the quality of the work, and this was purposely maintained through this programme. Filming and camera techniques, editing and treatment of sound, as well as issues like live captioning all needed to be considered in light of the work being presented, and learning curves in this respect were steep. But quality matters and quality costs.

6.7 Build it and they may not come

Improving and extending the experience - through behind the scenes content, online platforms, learning, engagement and interactivity through social channels - is seen as a natural progression for cultural organisations. However, when it comes to the digital distribution of such experiences and content there is a choice. Organisations can build their own bespoke platform, which will offer greater control but require upfront investment and a lot of hard effort to generate an audience. Alternatively, an organisation can work with existing channels (eg YouTube, Vimeo etc) which has the benefit of an existing and interested audience, sometimes in large numbers, even if some of the terms and conditions may require organisational compromise. During this programme the Edinburgh Festivals experimented with both modes of operation and on balance the experience is that the latter is more practical, given the questionable assumption that people will come to bespoke platforms and the problem of securing long-term sustained investment.

6.8 Share the digital load

There is no doubt that adopting digital working is challenging and learning curves are steep. Finding the right partners is therefore essential, whether that is creative or technical and it is important to approach the challenge with a partnership mentality from the outset. Every cultural organisation has its own programming perspective and will respond to opportunities or challenges in its own way relating to its business operation, but it is important to be open to looking beyond their sector for digital expertise while also seeking partnership with peers that may be further down the digital road. Such partnerships de-risk innovative digital operations, which can be problematic in their initial stages, allowing organisations to 'hedge' their bets and share the digital load. What was of particular interest to the Edinburgh Festivals during this programme was the opportunity to open dialogue with others, particularly the business, academic and developer sectors in the city, and the fact that some of these led to practical programmes of new operation - and the evolution of what is hoped will be long-term relationships.

6.9 It's not about the economy, stupid

A lot has been written about the potential income streams which cultural organisations could secure from developing more effective online activities, with most of it focusing primarily on the transactional nature of event attendance. However, this appears to value arts and culture primarily for the economic contribution rather than the wider contribution to ideas or society - and it fails to address one of the fundamental points of difference in how cultural organisations, as opposed to creative industries, approach the digital question. Cultural organisations are not driven by the

profit motive and as such are reluctant to adopt practices that might exclude audiences on the basis of income and thus damage long developed inclusivity agendas. During this programme the Edinburgh Festivals experimented with different purchase models, including 'pay what you can', and came to clearly understand that digital should not be seen as a solution to difficult trading conditions, but more as a means of enhancing, extending and improving cultural work and its presentation.

6.10 Try again, fail again, fail better

Digital development in the cultural sector is still evolving. What works for one type of organisation will turn another off and for every success there will be failures. However, experimentation and a willingness to take risks are essential ingredients for innovation. As noted previously, partnerships can be a crucial element in de-risking innovations and thus creating a suitable environment for experimentation. But the corporate ethos needs to be ready to embrace risk in and of itself, and see it as a fundamental value of any evolving cultural organisation. This is a difficult position to take, especially at moments when there is an existential threat to organisational survival as was seen during the pandemic and currently during the cost-of-living crisis. What this programme allowed the Edinburgh Festivals to do was take further risks and enhance their long-term brand positioning as 'laboratories' of new thinking and new practice - and create a secure test bed for new projects which could succeed or fail on their own merits, without affecting the integrity of the entire festival business operation. The concept of risk and experimentation is crucial to the festivals, as is the knowledge that experiments by their very nature can fail. In reflecting on their approach to digital, one festival cited the great Irish dramatist Samuel Beckett: *'Try again. Fail again. Fail better.'*

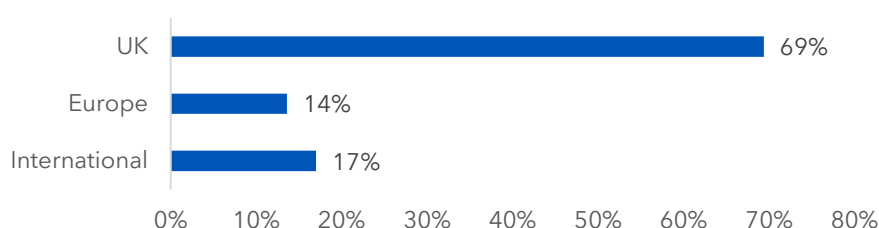
Appendix A: Arts Industry Survey

A survey was undertaken with Edinburgh Fringe attendees within the arts industry. The survey received a total of 147 responses, and respondents ranged from freelancers and assistants to CEOs. Of those who listed their job title, just under one third reported that they were a director (30%), and around one quarter (23%) had the title of producer.

Respondent Profile

Over two-thirds of respondents listed their country of residence as within the United Kingdom (69%). A further 14% stated they reside in European countries and the final 17% were international - including the United States of America, Dubai, Australia and Japan - **Figure A.1**.

Figure A.1: Arts Industry - Country of Residence

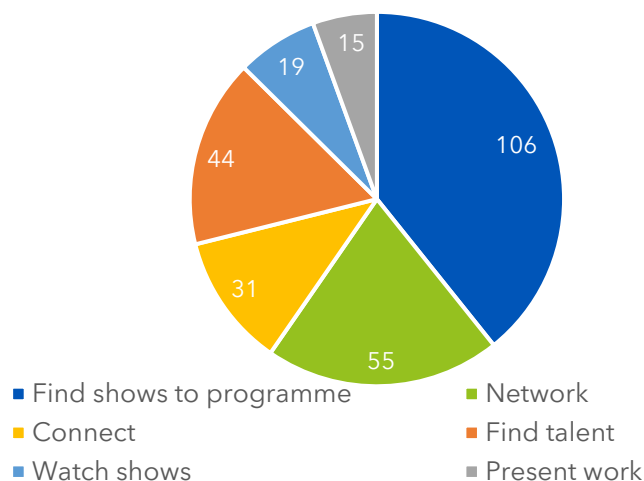


N=147

Objectives

Respondents were asked about their main objectives when engaging with the Edinburgh Fringe Festival. A range of objectives were identified, the most common were finding shows to programme, networking and engaging with talent for future commissioning, **Figure A.2**.

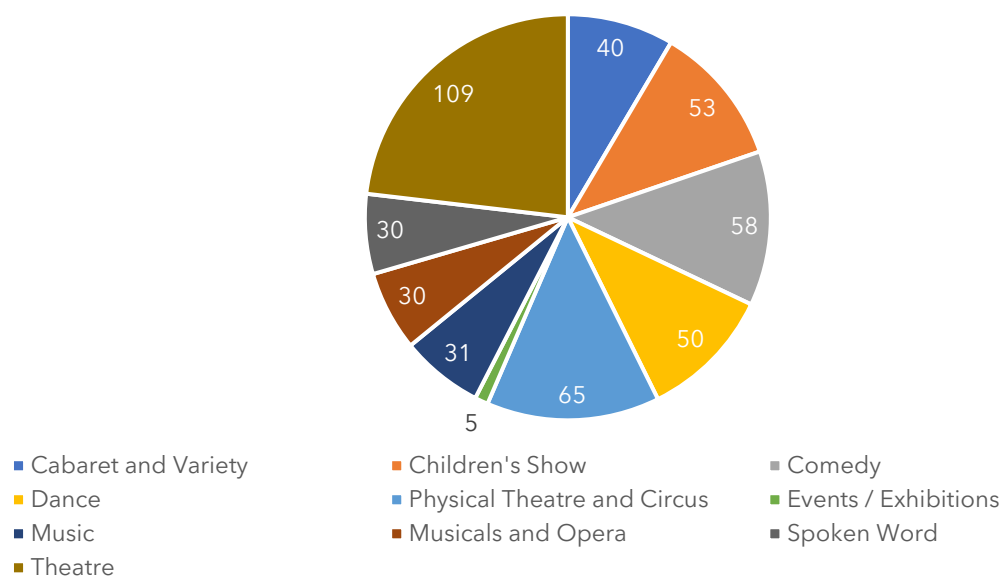
Figure A.2: Engagement objectives



N=146

Respondents were asked to select the types of shows they were aiming to programme whilst at the Fringe Festival. The most common types of shows were theatre, which 78% of respondents were hoping to programme. Contrastingly, very few respondents were looking to programme musicals and opera shows - [Figure A.3](#).

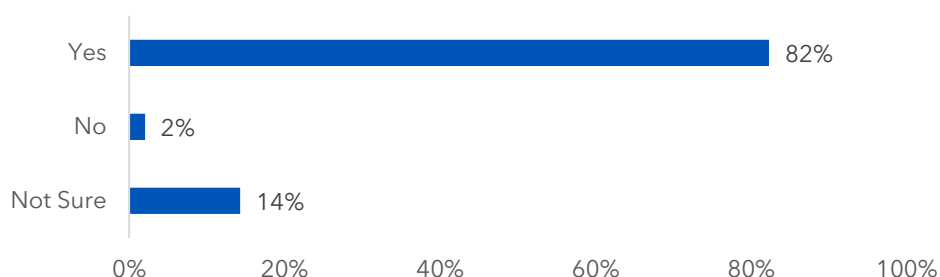
Figure A.3: Types of shows respondents aimed to programme



N=139

When asked if they achieved their goals, over four fifths of those surveyed felt they did (82%), with only 2% reporting that they did not achieve their main objectives, see [Figure A.4](#) below.

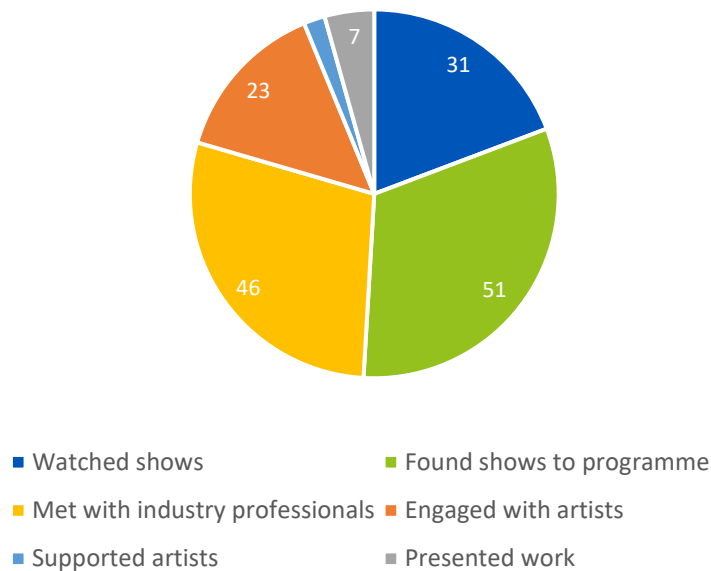
Figure A.4: Objective achievement



N=147

Respondents listed how they managed to achieve their objectives. There were a range of responses, with [Figure A.5](#) outlining the most common themes, including watching shows, meeting with industry professionals and engaging with artists.

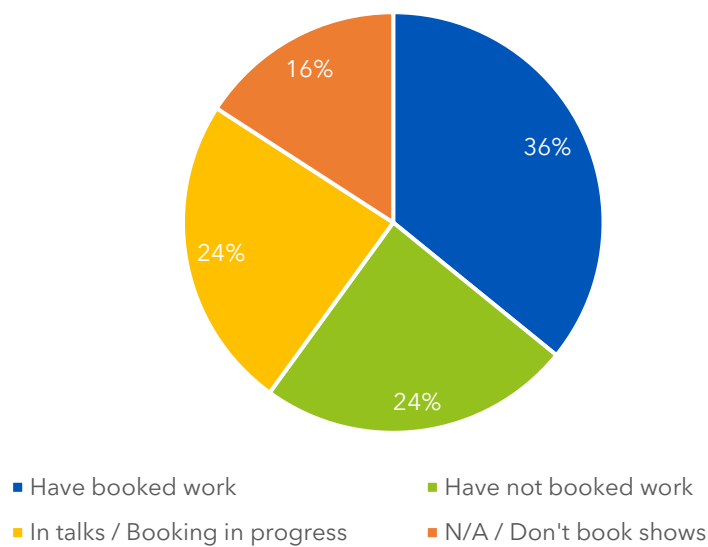
Figure A.5: Methods used to achieve goals



N=103

Many respondents stated that one of their objectives during the Fringe Festival was to book work and/or offer commission to shows/artists. Respondents were asked whether they managed to book work. Over one third (36%) reported that they had booked work, with a further 24% stating they were in the process of booking work/in talks to book work, [Figure A.6](#).

Figure A.6: Work booked



N=145

Services

The survey asked about respondents' engagement and experiences with various services that were offered. As shown by **Figure A.7**, the most commonly used services were the complimentary ticket request and accreditation services – with very few respondents not utilising any of the available services.

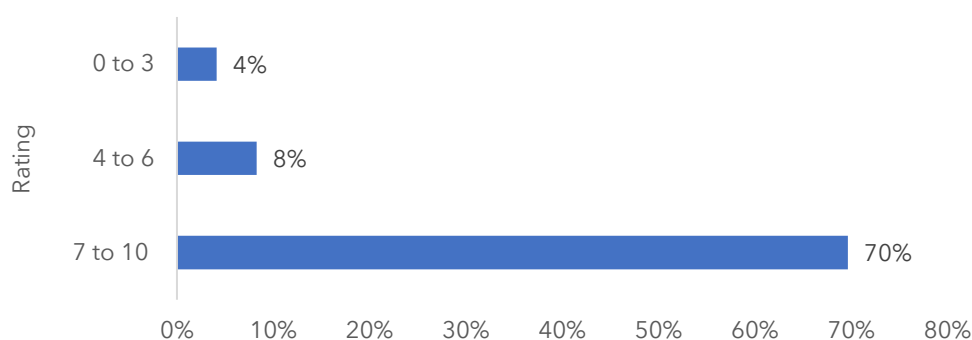
Figure A.7: Services used



N=147

Those who were accredited were asked to rate how clear and easy the process was on a scale from one to ten, with ten being extremely easy. As shown by **Figure A.8**, only 4% rated the accreditation process poorly, with 70% rating it between seven and ten.

Figure A.8: Clarity and ease of the accreditation process



N=119

Those who found it difficult were asked why. This received few responses, due to a small number of respondents rating it poorly, these responses can be split into two categories:

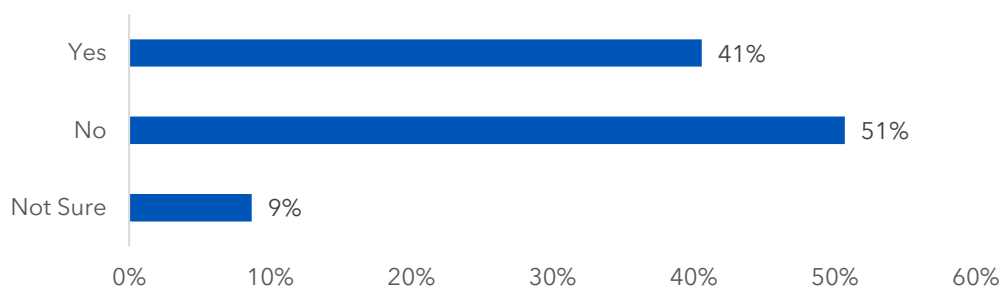
- System difficulties/issues.
- Errors in access given.

Fringe Marketplace

The survey asked respondents about their experience with Fringe Marketplace in the lead up to and during the Fringe Festival.

Respondents were asked whether they used the Fringe Marketplace in the lead up to and/or during the month of August. 41% stated that they did make use of this service, see [Figure A.9](#).

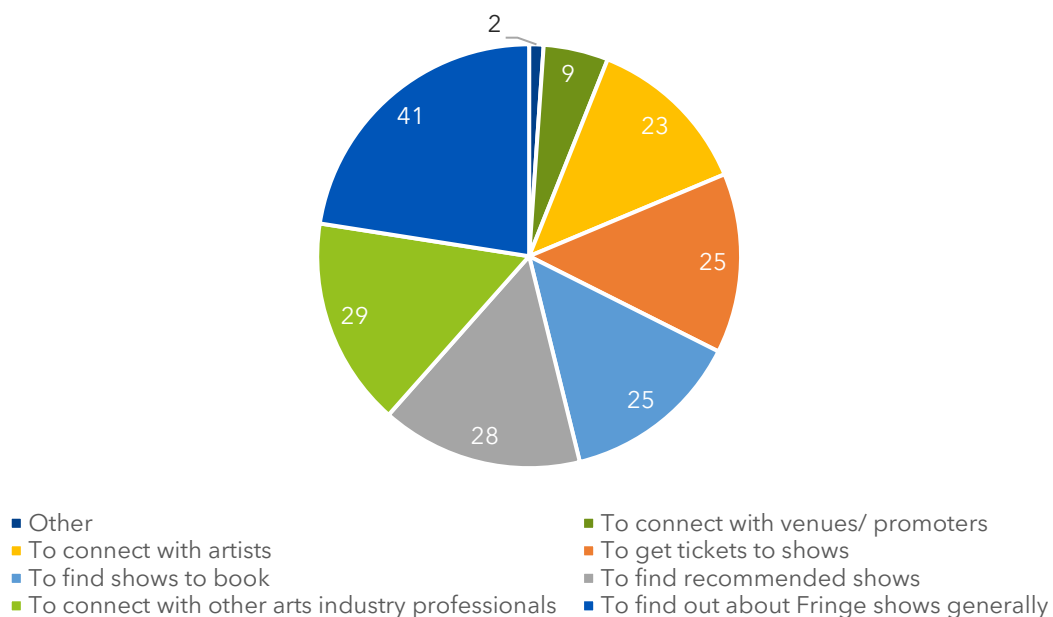
Figure A.9: Did you use the Fringe Marketplace in the lead up to and/or during the month of August?



N=138

When asked what they hoped to get from engaging with Fringe Marketplace, the most common response was finding out about Fringe shows generally, followed by connecting with other arts industry professionals. As shown in [Figure A.10](#), respondents were hoping to gain many things from engaging with the Fringe Marketplace - this response received 182 answers from 56 respondents (multiple responses were possible).

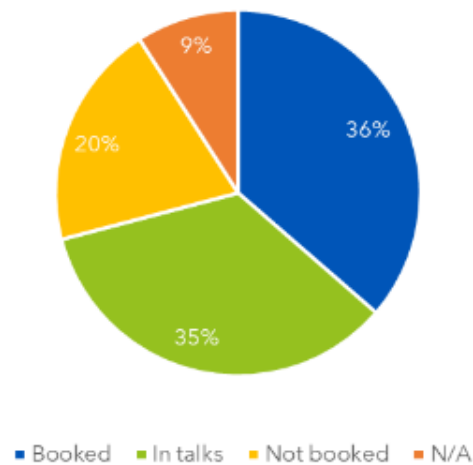
Figure A.10: Fringe Marketplace Aims



N=56

Over one third (36%) of Fringe Marketplace users booked work or offered a commission to a Fringe 2022 show/artist. A further 35% were also in talks to complete bookings. Overall, 71% of Marketplace users were able to start the process to book work or find shows/artists to commission from the 2022 Fringe Festival, **Figure A.11**.

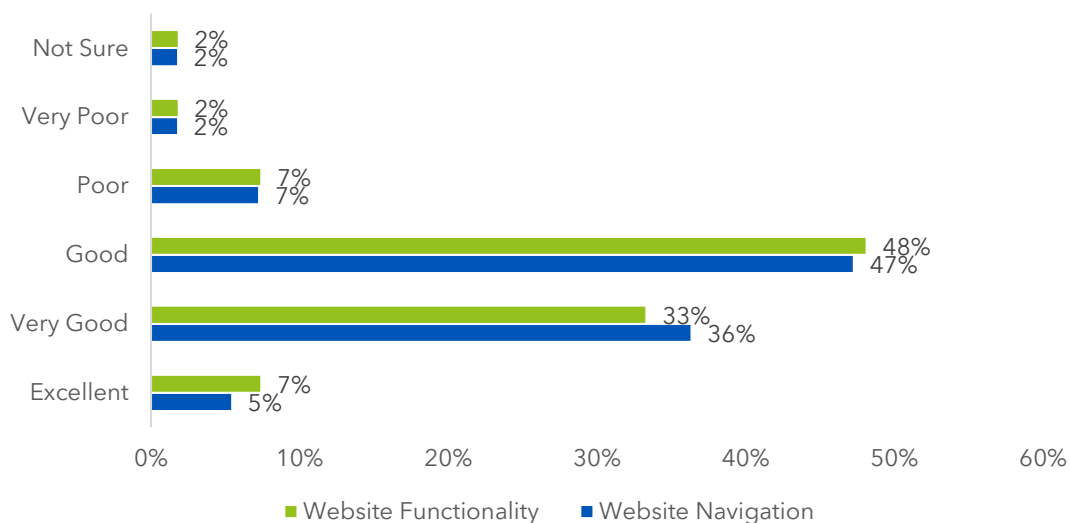
Figure A.11: Shows booked by Marketplace users



N=55

Respondents were asked to rate various aspects of the Fringe Marketplace. **Figure A.12** below shows how respondents rated the Fringe Marketplace’s website navigation and functionality. When asked about the website functionality, the majority of respondents (89%) rated this positively – 33% of which rated it very good. Only 9% of respondents felt that the website functionality was poor. Website navigation received similar results, though slightly fewer respondents rated this excellent.

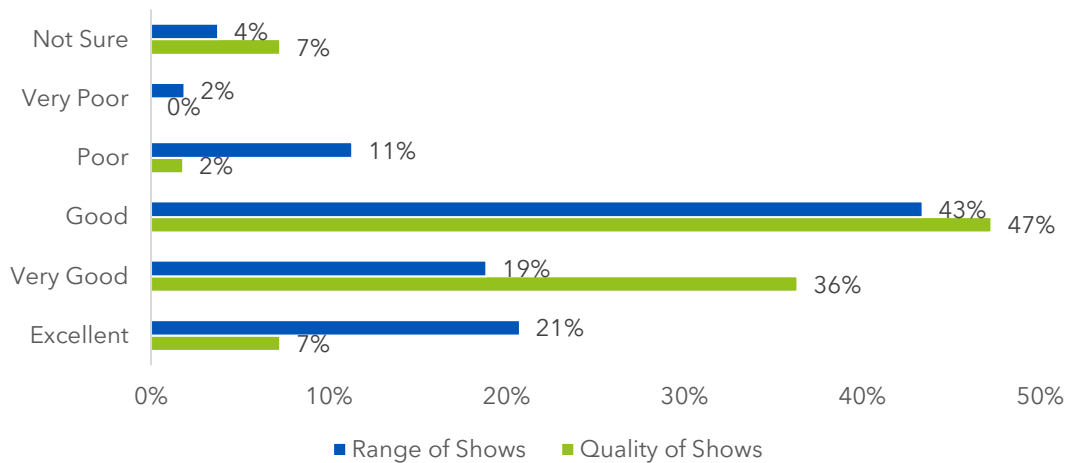
Figure A.12: Fringe Marketplace website navigation and functionality



N=55 and N=54

The survey also asked respondents to rate the quality and range of shows on the Marketplace site - **Figure A.13**. As shown, the majority of respondents felt that the range and quality of shows provided by the Marketplace site were good, with 91% and 83% rating these aspects positively, respectively. Though most rated these aspects highly, 11% of respondents felt that the range of shows available on the Marketplace site were poor.

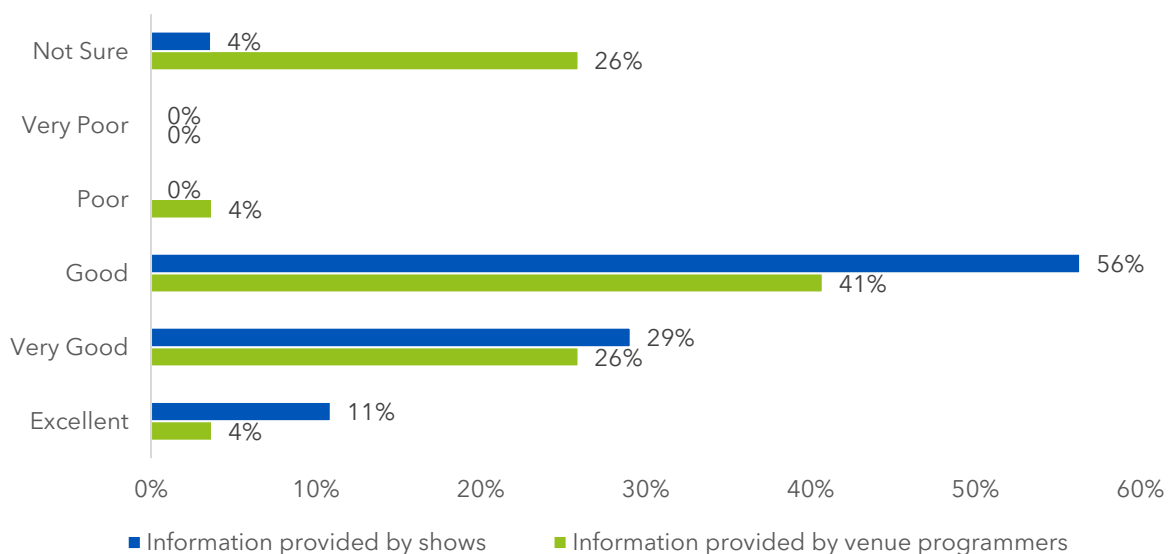
Figure A.13: Show range, quality and information provided on the Marketplace site



N=53 and N=55

Figure A.14 shows respondents' opinions on the information provided by shows alongside the information provided by venue programmers. As highlighted below, respondents felt more positively about the information provided by shows - with 96% rating this positively. The information provided by venue programmers did not receive quite as high a rating, with 70% rating this positively.

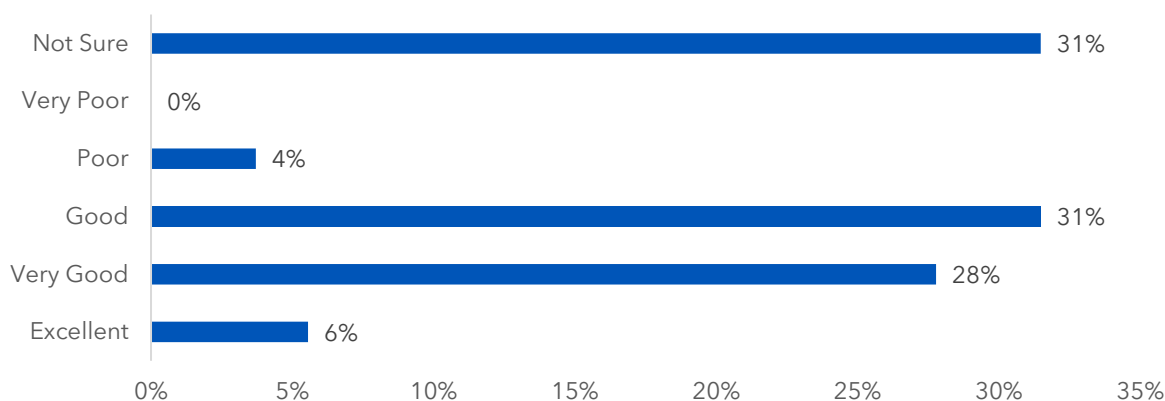
Figure A.14: Information provided by shows and venue programmers



N=55 and N=54

Respondents were also asked how useful Fringe Associates were for recommending shows. Around two thirds of respondents rated this positively, 65%. Just under one third (31%) stated they were not sure, [Figure A.15](#) below.

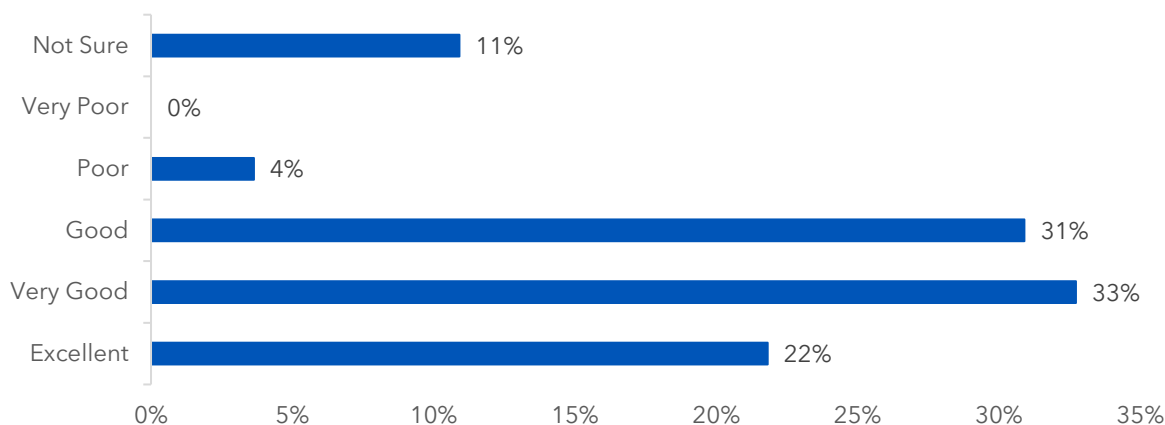
Figure A.15: Usefulness of Fringe Associates' recommendations for shows



N=54

When asked to describe their experience of access to complimentary tickets, over four fifths of respondents (85%) rated it positively – [Figure A.16](#).

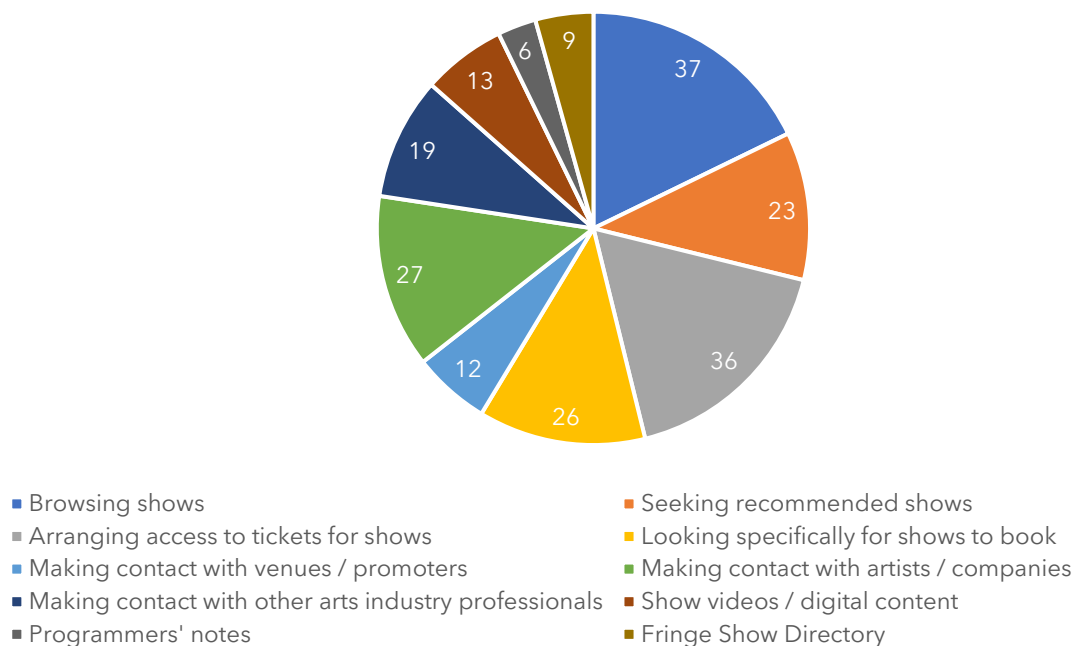
Figure A.16: Access to complimentary tickets



N=55

The survey asked those in the arts industry which features of the Fringe Marketplace they found useful in supporting their engagement and objectives. As highlighted by [Figure A.17](#), respondents highlighted multiple aspects of the Fringe Marketplace that they found useful. The ability to browse shows was the most commonly mentioned feature, followed closely by arranging access to tickets for shows.

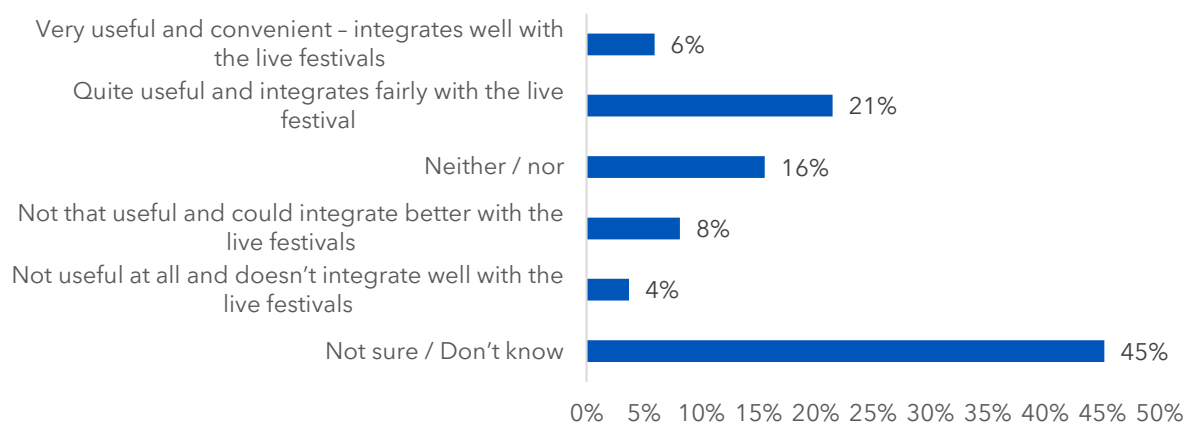
Figure A.17: Useful aspects of Fringe Marketplace



N=55

Respondents were asked how they found the digital platform for Fringe Marketplace in terms of how it related to the live festivals. Just under half of respondents (45%) reported that they were unsure and did not know. Around one quarter (27%) found it to be useful and felt that the digital platform integrated with the live festivals somewhat, see [Figure A.18](#).

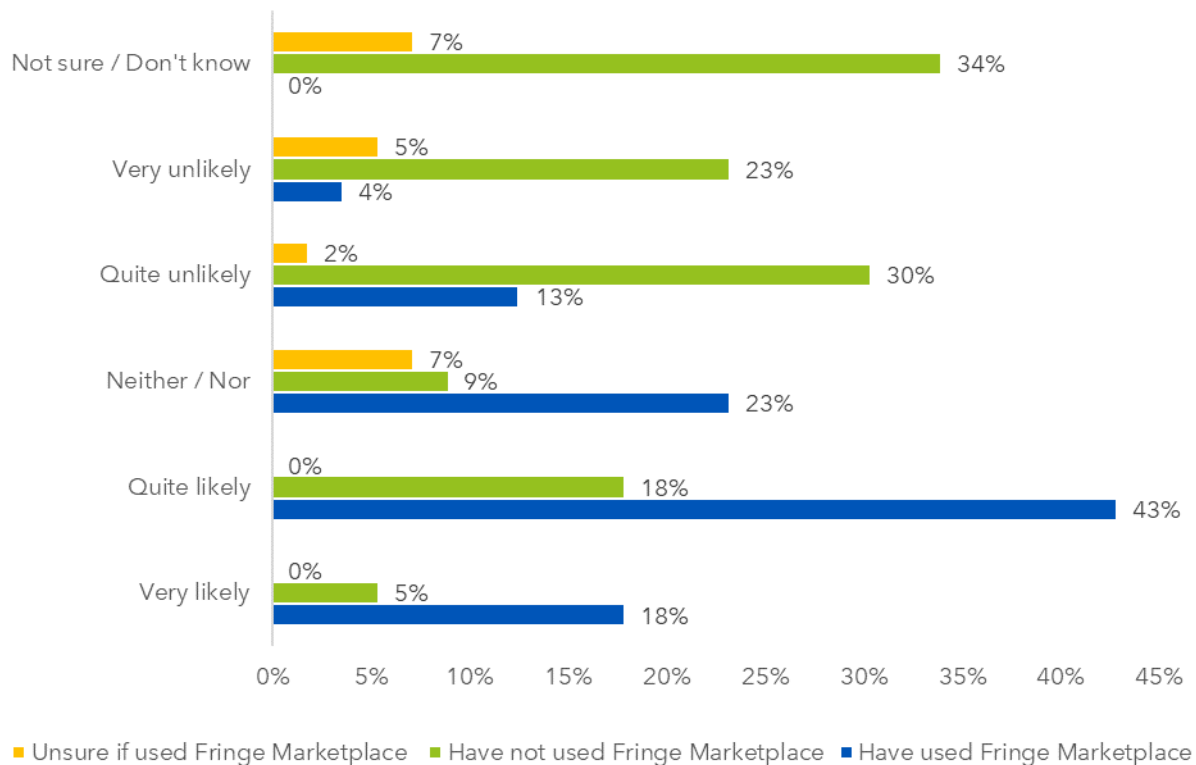
Figure A.18: Integration of Fringe Marketplace digital platform with live festivals



N=135

The Fringe Marketplace is accessible until Spring 2023. All respondents (those that had used Marketplace and those that had not) were asked how likely they were to use the Marketplace between now and the next Fringe Festival. [Figure A.19](#) shows that responses were fairly mixed, but highly dependent on prior use of the platform. Those that had used it were far more likely to use it again between now and the next Fringe Festival.

Figure A.19: Comparison of Marketplace usage and likelihood of using Fringe Marketplace between now and the next Fringe Festival



N=135

When asked if they had any additional comments to make about the Fringe Marketplace, arts industry respondents gave a range of answers, including:

- Technical improvements to the Fringe Marketplace, such as:
 - Resolving issues with the site crashing when purchasing tickets.
 - Improvements to the search function, particularly for finding shows.
 - Making it easier to post opportunities.
- Expansion of the range of shows and artists listed on the Marketplace. Respondents mentioned a lack of comedy shows.
- The addition of show information alongside full show video uploads.
- Contact details being made more readily available.

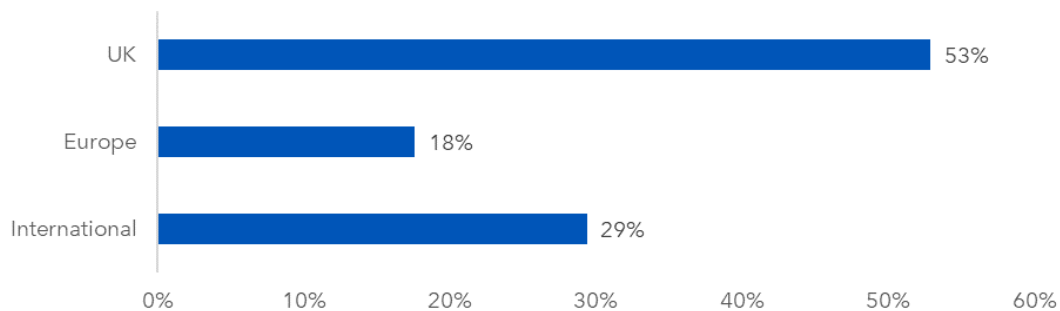
Appendix B: Fringe Shows Survey

A survey was carried out with a targeted group of Marketplace artists (those that were selected by the venues for inclusion on the Fringe Marketplace). The survey received a total of 17 responses.

Respondent Profile

Just over half (53%) of those who submitted shows to the Fringe Show Directory on the Fringe Marketplace listed their location as within the UK. Of this, 12% were Scottish and the remaining 41% were English. Those who were international came from Australia and the United States, **Figure B.1**.

Figure B.1: Country of residence

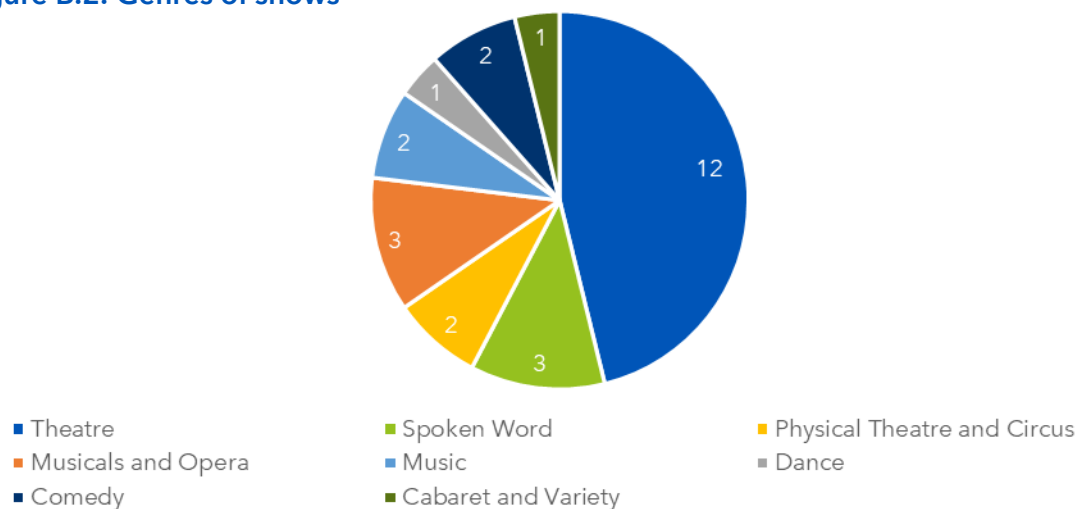


N=17

Shows

Respondents were asked to select the genre(s) of their show(s). The most popular genre was theatre, with dance and cabaret and variety being the least common - **Figure B.2**.

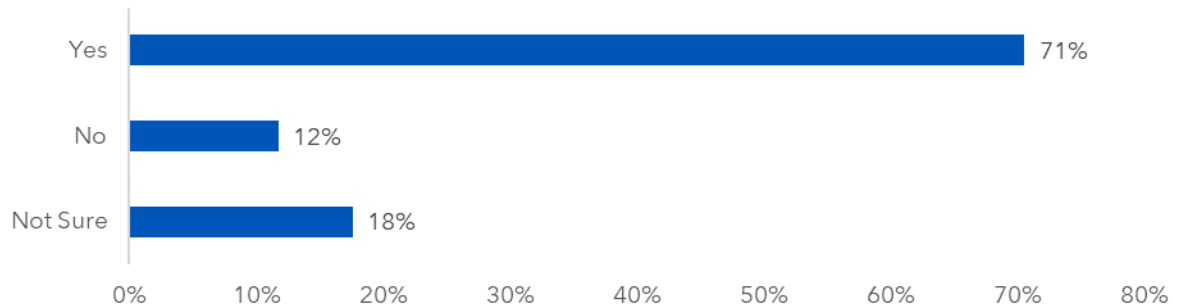
Figure B.2: Genres of shows



N=17

Artists were asked whether they were looking for bookings after presenting their work at the Edinburgh Festivals. Just under three quarters of respondents (71%) stated that they were, **Figure B.3**.

Figure B.3: Are you looking for bookings post-presenting at the Edinburgh Festivals this year?

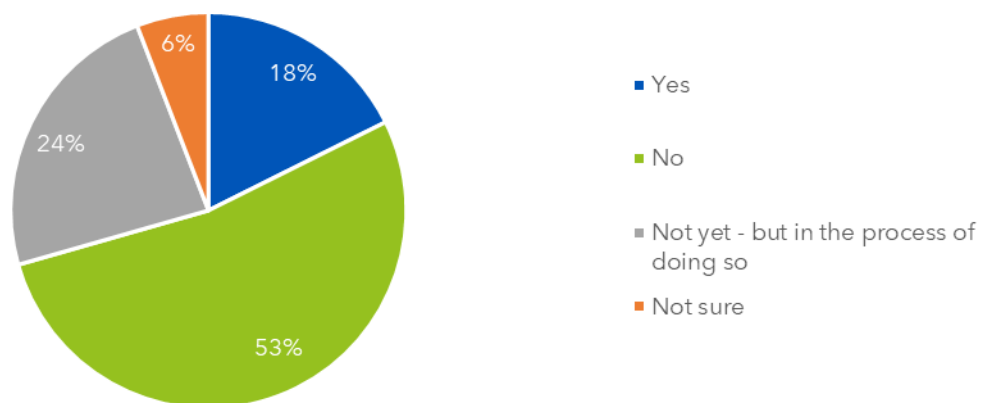


N=17

Respondents gave more details on the type bookings they were looking for. In terms of location, many stated that they were aiming to book their show(s) across Scotland and the UK, while some stated they wanted to expand internationally.

When asked whether their show(s) had been booked or given other opportunities as a result of performing at the Fringe, over half of respondents (53%) answered no – **Figure B.4**. Just under one fifth (18%) stated they had been booked or given opportunities, and a further 24% said they were in the process of doing so.

Figure B.4: Has your show(s) been booked or given other opportunities as a result of performing at the Fringe

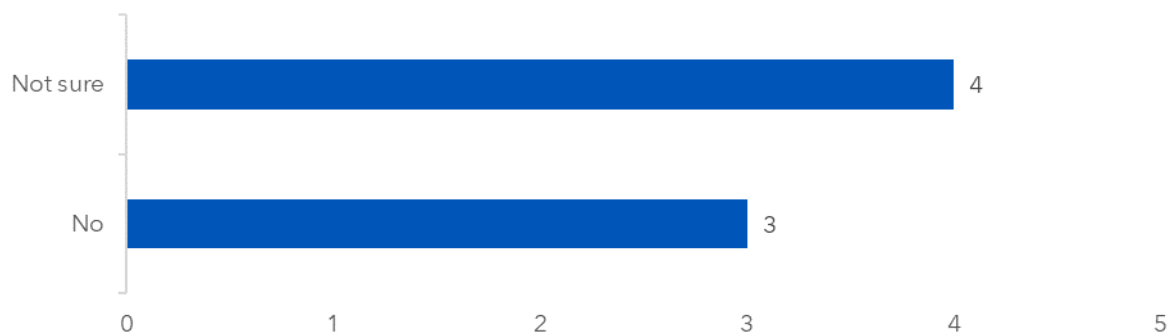


N=17

Those who had their show(s) booked or gained opportunities, or are in the process of doing so, were asked if these opportunities came as a result of submitting to the Fringe Show Directory on the Marketplace. This received few responses, with all respondents either answering 'no' or 'not

sure' - **Figure B.5**. The small sample size here means that this result should be treated with some caution.

Figure B.5: Did any of these opportunities come as a result of submitting to the Fringe Show Directory on the Marketplace?



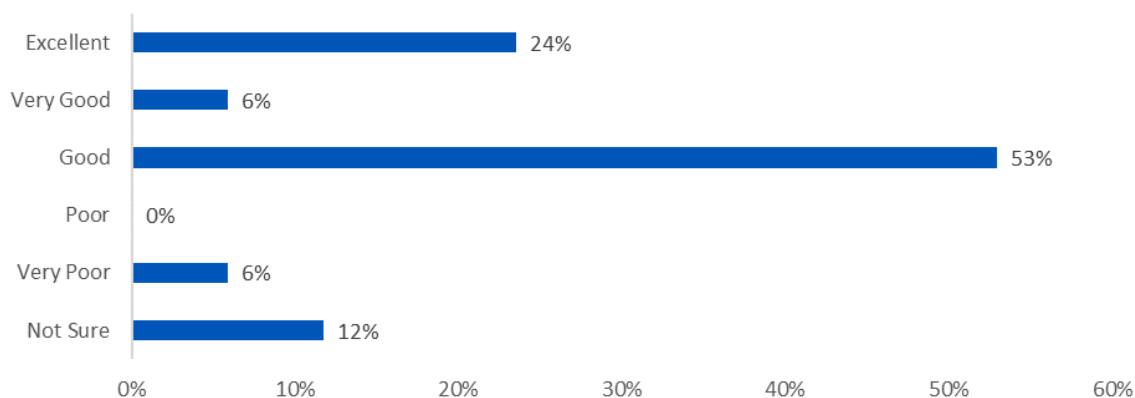
N=7

Experience of Fringe Marketplace

This section will explore the artists' experience of various aspects of Fringe Marketplace. It will also include what artists aimed to achieve by using Fringe Marketplace.

When asked about their thoughts on the ease of the submission process, 82% of respondents rated this good to some extent, around one quarter of which (24%) rated this excellent - **Figure B.6**.

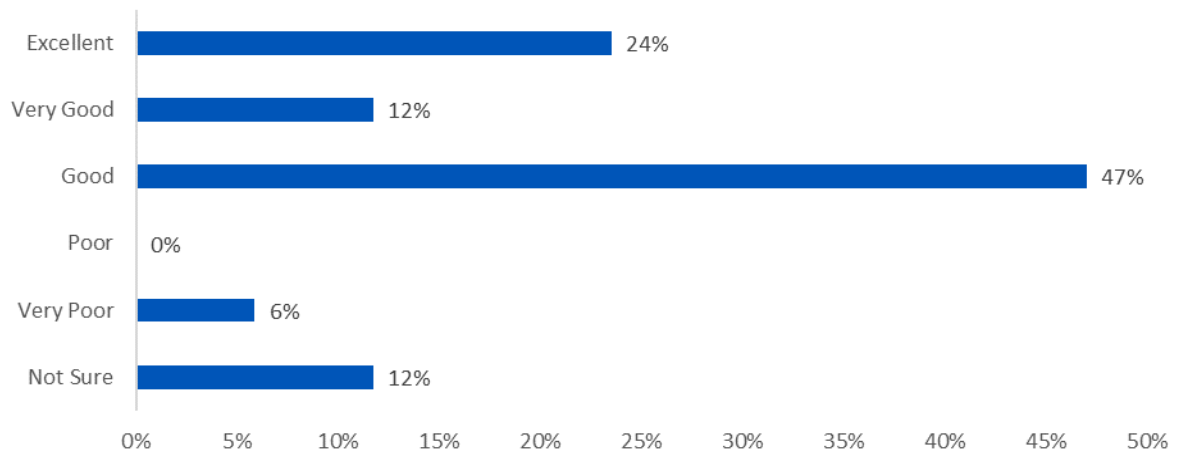
Figure B.6: Ease of submission process



N=17

Respondents were also asked their opinions on the speed of the submission process. This received similar results, with 82% also rating this good to some extent - **Figure B.7**.

Figure B.7: Speed of submission process

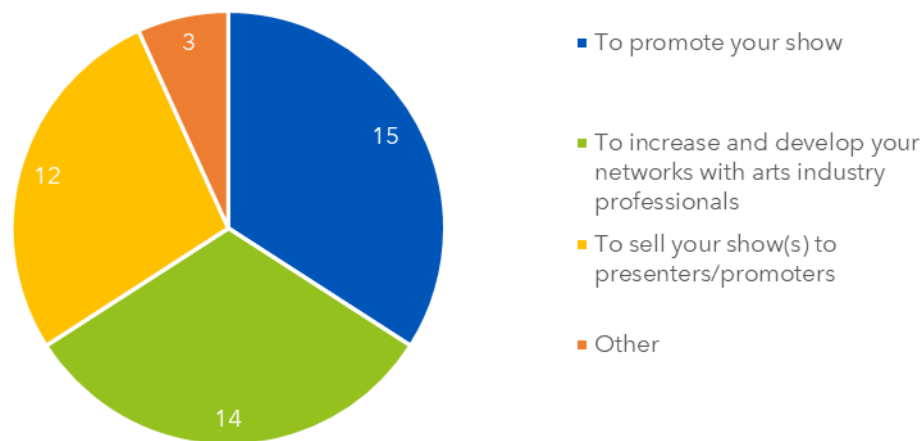


N=17

Respondents were asked what they hoped to get from their engagement with Fringe Marketplace. Most respondents gave multiple answers, resulting in 44 responses from 17 respondents. The most common answer was promoting their show, followed by increasing and expanding networks,

Figure B.8.

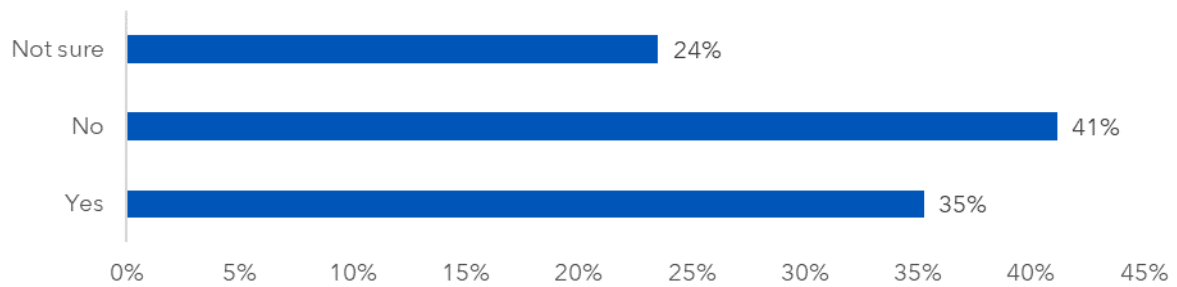
Figure B.8: What did you hope to get from your engagement with Fringe Marketplace?



N=17

The survey asked respondents whether they had promoted their show(s) on Fringe Marketplace to industry buyers. This received mixed responses, with around one third (35%) of respondents answering yes and a further quarter (24%) being unsure - **Figure B.9.**

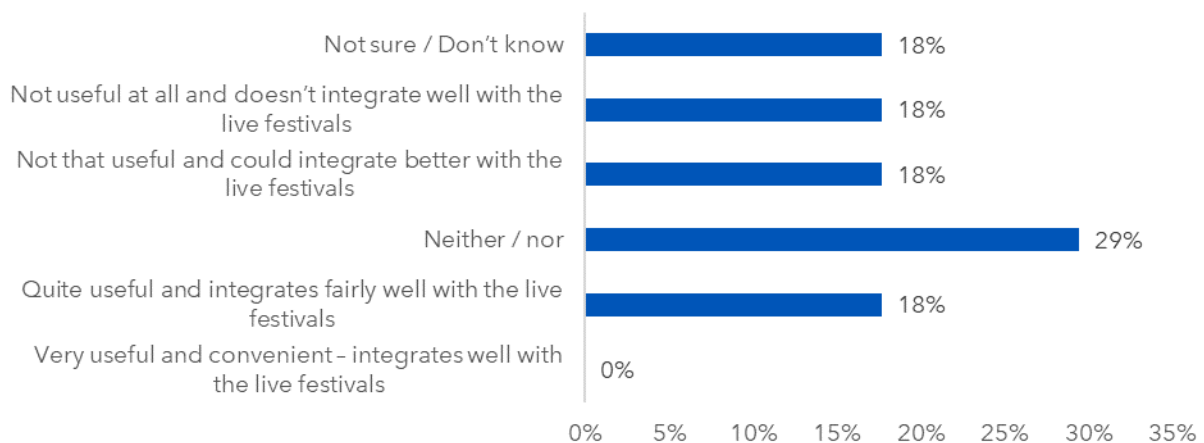
Figure B.9: Have you promoted your show(s) on Fringe Marketplace to industry



N=17

When asked about the integration of the digital platform for Fringe Marketplace alongside participation in the live festival, respondents gave mixed responses. 36% of respondents felt it was not useful to some extent and it could integrate better with the live festivals, [Figure B.10](#).

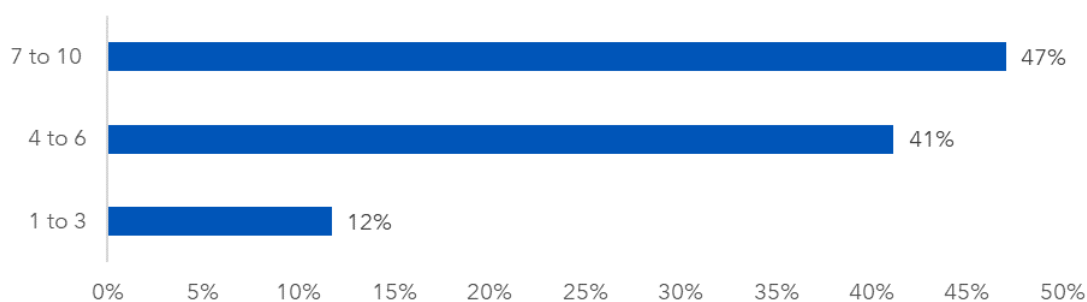
Figure B.10: How did you find the digital platform for Fringe Marketplace integrated with your participation in the live festival?



N=17

Based on their experiences with Fringe Marketplace, artists were asked how likely they would be to promote/sell their show(s) through Fringe Marketplace in the future. Artists ranked their likelihood on a scale from one to ten, with ten being extremely likely - [Figure B.11](#). Just under half of respondents (47%) gave ratings of between seven and ten.

Figure B.11: Likelihood to promote/sell shows through Fringe Marketplace in future



N=17

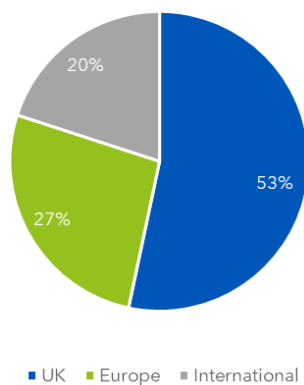
Appendix C: Artists Survey

Finally, a survey was carried out with artists who submitted their show(s) to the Fringe Show Directory (who were not selected by their venues). This received a total of 15 responses.

Respondent Profile

Over half of respondents (53%) stated that they were based in the UK, two of which said they were from Scotland. There were also a few international respondents, from Australia and Korea - **Figure C.1**.

Figure C.1: Residence of respondent

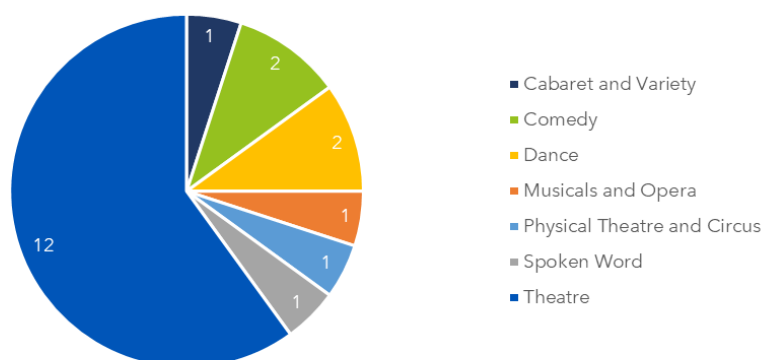


N=15

Show(s) submitted to Fringe Marketplace

When asked the genre of their show(s), the majority of respondents stated that their work fit into the theatre genre, though some shows fell under multiple genres **Figure C.2**.

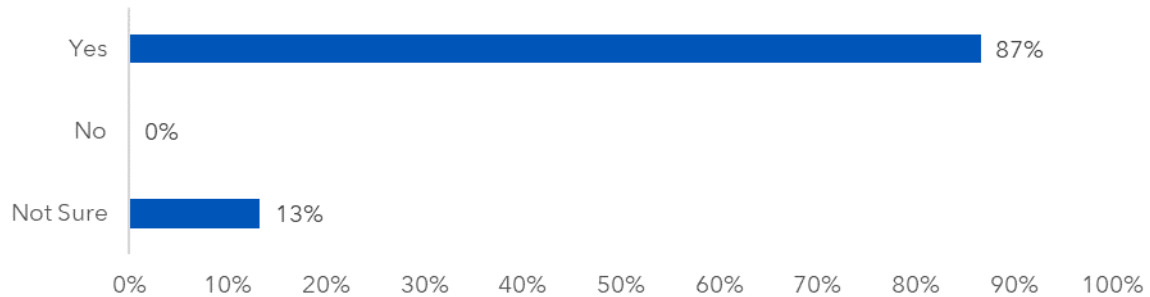
Figure C.2: Genre of show(s)



N=15

The survey asked artists whether they were looking for bookings after presenting their work at the 2022 Edinburgh Festivals. 87% stated that they were looking for bookings, with no respondents answering that they were not – **Figure C.3**.

Figure C.3: Are you looking for bookings post-presenting at the Edinburgh Festivals this year?



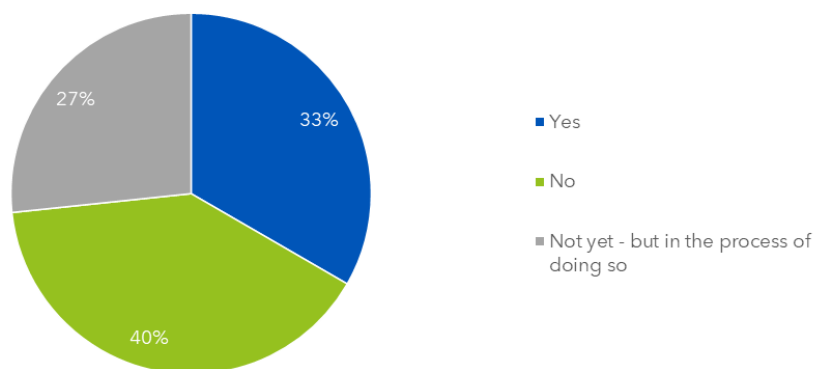
N=15

Artists were asked which locations they wanted their show(s) to be booked in. A few responded worldwide, with common answers also including:

- UK
- Europe
- USA
- Australia

As shown by **Figure C.4**, one third of respondents reported that their show has been booked or given other opportunities as a result of performing at the Fringe. A further 27% also reported that while this has not happened yet, they are in the process of being booked/given opportunities.

Figure C.4: Has your show(s) been booked or given other opportunities as a result of performing at the Fringe?

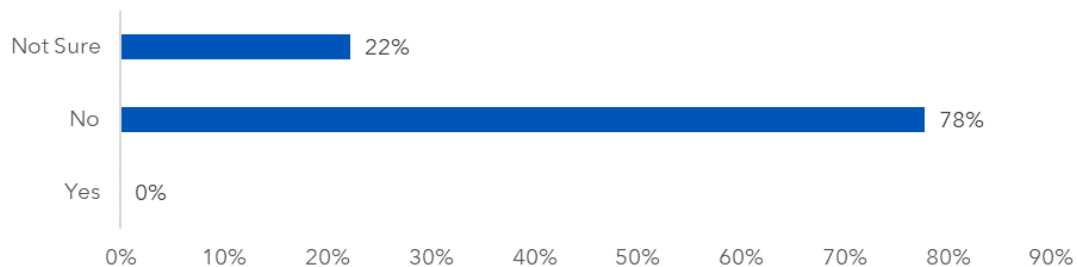


N=15

Those who responded 'yes' and 'not yet' were asked if these opportunities arose as a direct result of submitting to the Fringe Marketplace. Of the nine respondents 78% reported that these

opportunities were not due to submitting to Fringe Marketplace, with the remaining 22% stating that they were unsure.

Figure C.5: Did these opportunities come as a result of submitting to the Fringe Marketplace?



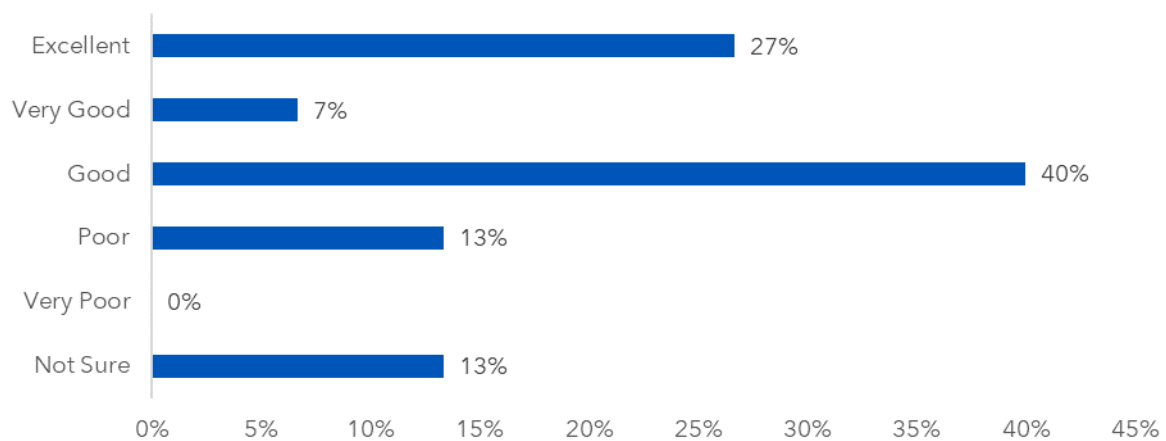
N=9

Experience of using Fringe Marketplace

Respondents were asked to describe their experience of using various aspects of Fringe Marketplace. They were also asked what they aimed to achieve by using Fringe Marketplace.

When asked their opinions on the ease of the submission process, around three quarters (74%) rated this good to some extent, with over a quarter (27%) rating it excellent, see [Figure C.6](#).

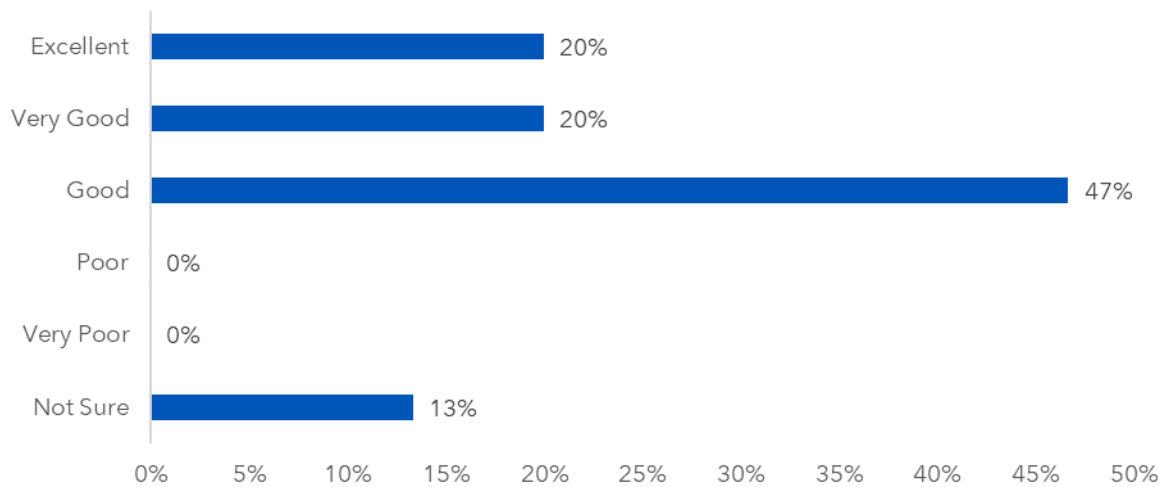
Figure C.6: Ease of submission process



N=15

77% of respondents rated the speed of the submission process positively, with no respondents explicitly rating this poorly, though 13% were unsure - [Figure C.7](#).

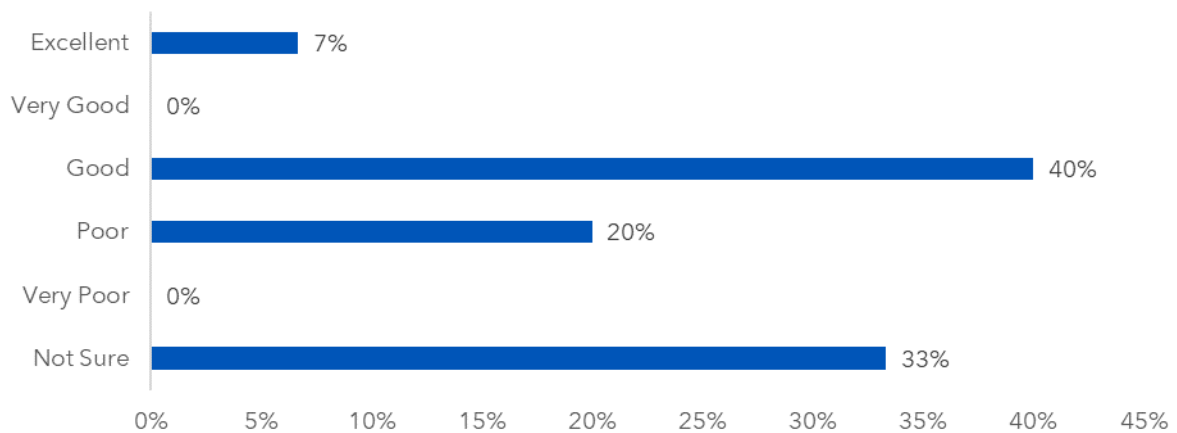
Figure C.7: Speed of submission process



N=15

Artists were given a unique link to their show listing which they could share with industry professionals. When asked about their experience with this, just under half (47%) rated this positively, while one fifth (20%) had a poor experience, [Figure C.8](#).

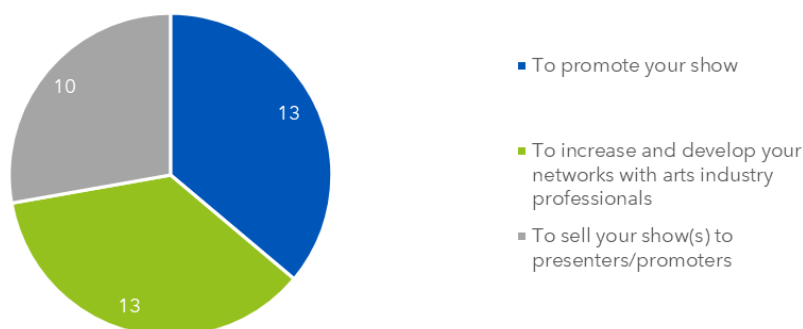
Figure C.8: Unique link to share with industry



N=15

When asked what they hoped to get from their engagement with Fringe Marketplace, respondents gave a range of answers, see [Figure C.9](#) below. Namely, respondents wanted to use Fringe Marketplace to promote their show and expand their networks.

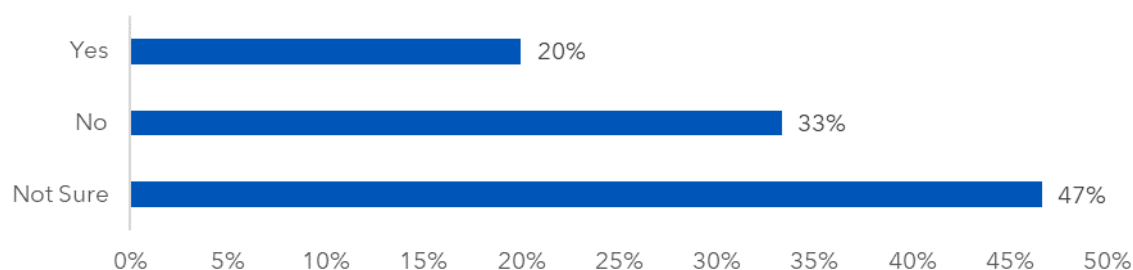
Figure C.9: What did you hope to get from your engagement with Fringe Marketplace?



N=15

Only one fifth (20%) of respondents promoted their show(s) on Fringe Marketplace to industry buyers, with around half of the respondents (47%) being unsure if they did - **Figure C.10**.

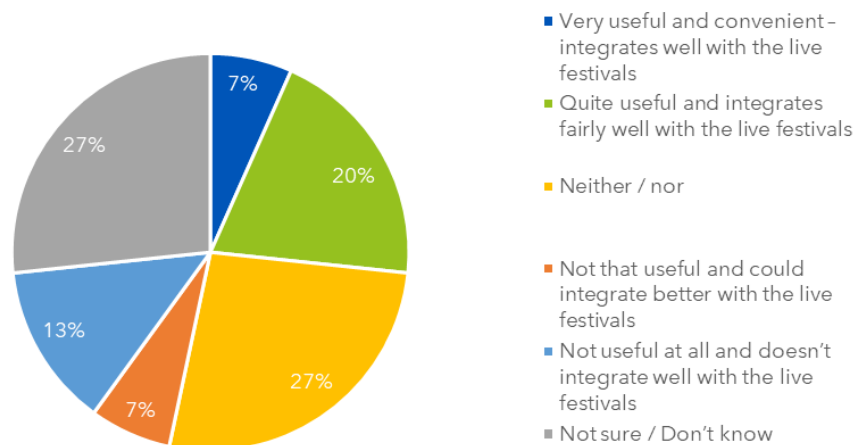
Figure C.10: Did you promote your show(s) on Fringe Marketplace to industry buyers?



N=15

The survey asked respondents their opinions on how the digital platform for Fringe Marketplace integrated with their participation in the live festival. Over one quarter (27%) felt this was very or somewhat useful, **Figure C.11**.

Figure C.11: How did you find the digital platform for Fringe Marketplace integrated with your participation in the live festival?

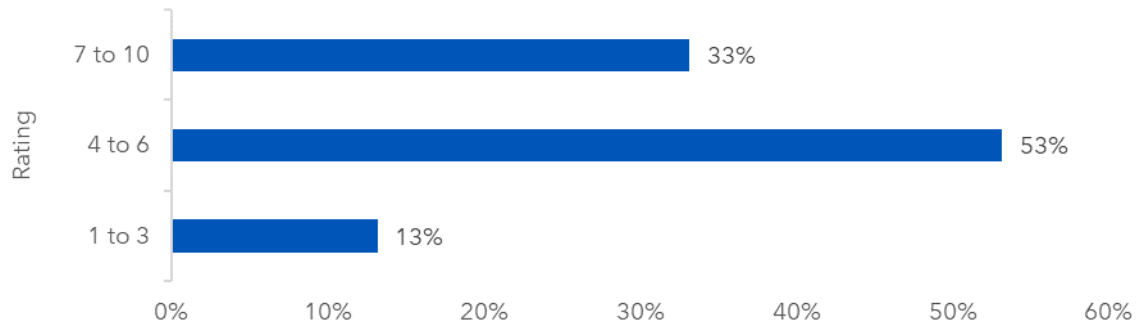


N=15

Respondents were asked how likely they would be to promote/sell their show through Fringe Marketplace in the future. They were asked to rate this on a scale from one to ten, with ten being extremely likely. One third (33%) of respondents gave ratings between seven and ten, showing that they would be very likely to promote/sell their show through Fringe Marketplace in the future -

Figure C.12.

Figure C.12: How likely is it that you will look to promote/sell your show through Fringe Marketplace in the future?



N=15

When asked if they had any additional comments, few artists responded. These responses included the need for more clarity, particularly on the tools available on Fringe Marketplace as some respondents mentioned feeling confused surrounding what was available to them. Other comments included suggestions to give artists direct access to upload materials and view other Fringe Marketplace pages.