

## TEMPORARY STRUCTURES FOR OUTDOOR CULTURAL EVENTS

### A MARKET OPPORTUNITY?



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<b>Contents</b>	<b>Page Number</b>
<b>1. Executive Summary</b>	<b>3</b>
<b>2. Introduction</b>	<b>5</b>
2.1 Definitions and Parameters	
2.2 Methodology	
<b>3. Strategic Framework</b>	<b>7</b>
<b>4. The Economic Impact of Outdoor Cultural Events</b>	<b>8</b>
4.1 Measuring the impact of innovative temporary structures	
<b>5. Innovative Temporary Structures – The Opportunity</b>	<b>10</b>
<b>6. Demand and Feasibility</b>	<b>14</b>
9.1 Assessment of demand from key coastal towns	
9.2 Assessment of demand in other areas of the South East	
9.3 Agency views	
9.4 Potential business models	
<b>7. Conclusions and Recommendations</b>	<b>19</b>
<b>Appendices</b>	
<b>8. Market Overview and Literature review</b>	<b>21</b>
8.1 Market Overview	
8.2 Literature Review	
<b>9. Best Practice Examples</b>	<b>23</b>
9.1 Corporate high-end structures	
9.2 Conventional large frame clearspan marquees	
9.3 Big Tops and related pole tents	
9.4 Saddlespan structures	
9.5 Dome tents	
9.6 Specially commissioned, purpose built structures	
9.7 Specialist structures, generally available	
9.8 Small frame and pole marquees	
<b>10. Options Appraisal</b>	<b>47</b>
10.1 Common factors for consideration	
10.2 Typical standard costs	
10.3 Option One: Large Frame Marquee	
10.4 Option Two: The Lift	
10.5 Option Three: Spiegeltent	
<b>11 Outdoor temporary stages</b>	<b>61</b>
<b>12 Consultations</b>	<b>70</b>
<b>13 About the authors</b>	<b>71</b>

## 1. Executive Summary

SEEDA, the Regional Development Agency for the South East of England, has Culture and the Creative Industries as a cross cutting theme in the Regional Economic Strategy. Cultural festivals and events, many of them delivered outdoors, provide a significant contribution to the creative and visitor economy in the South East.

Temporary structures are a vital part of the outdoor event infrastructure and this report explores how a more innovative approach could improve the cultural and visitor offer and considers if there is a business case for investment.

The specific questions considered by the research were:

- What evidence exists to assess the impact of outdoor cultural events in general and how could the impact of innovative temporary structures best be considered?
- What examples of best practice exist for innovative temporary structures and how are they resourced?
- What options for innovative temporary structures are available and is there a demand from promoters of outdoor cultural events to use them?
- Is there a market opportunity and business case for investment in innovative temporary structures for outdoor cultural events?

After research and consultation with festival and event promoters and a review of the strategic aims of the agencies with an interest in this area, the report goes on to consider the impacts of cultural festivals in the South East. With the exception of the Brighton Festival 2004 study, there is not a lot of evidence, compared with other regions in the UK, of the substantial economic benefits, particularly from audiences, of Festivals in the South East. It concludes that it would not be appropriate to estimate the economic impact of the audiences for outdoor cultural events or the potential increase in economic impact from the increased use of innovative temporary structures without substantial further research.

The report outlines the great opportunity that the use of innovative temporary structures offers to outdoor cultural events to improve the South East's cultural offer and visitor economy. The report considers the various aspects of temporary structures and concludes that the focus should be on temporary venues for outdoor cultural events and aspires to be a useful handbook for promoters.

A market overview in the Appendix identifies eight categories of temporary venues from large to small and identifies a number of suppliers, giving contact details for further information. A literature review confirms that there has been very little published research in this area.

Using the eight categories identified, the report considers examples of best practice in innovative temporary structures that are excellent festival venues and provide a good environment for a range of different types of events. These examples describe, in the Appendix, the structures and where appropriate consider issues of capacity, construction time and cost.

An options appraisal in the Appendix examines and contrasts three temporary venue structures and considers common factors and standard costs which amount to £26,000 for a typical week irrespective of the temporary structure to be used. The three options range from a baseline large frame marquee with a capital cost of £65,000 or weekly hire of £18,000, up to the architect designed, specially commissioned structure with a capital cost of £650,000 or a weekly cost of £75,000.

An assessment of demand from key coastal towns and a range of promoters across the South East examines a number of specific uses and individual needs for temporary structures. The views of other public sector agencies are also considered.

The requirements of most of the events consulted were different enough to conclude that there was unlikely to be a 'one size fits all' solution to temporary venues. The report did not find an overwhelming belief amongst cultural event producers that a centrally procured temporary structures resource would provide a practical solution.

Overall it was clear that there is great interest and demand for temporary structures as temporary venues for cultural events in the South East and many promoters would like to use more innovative structures than they do currently. The problem for most is one of cost. Innovative structures cost more than standard ones and promoters have not generally been able to make a commercial business case for presenting their events in more interesting venues.

Most promoters consulted would welcome a subsidised intervention from public funds that saved cost and enabled a better customer experience to be delivered. However not surprisingly there are a wide range of requirements amongst promoters for the type of temporary venues that they wish to use based on the event and its location.

Two potential business models were considered, the *Kent Tent* involving the Higher Education sector and the *Broadstairs Big Top*, both requiring public sector funding.

Many innovative structures exist in the UK and overseas and are operated in both the commercial and subsidised sectors. A broad commercial hire market exists for these structures with many companies providing services.

The report concludes that, in general terms, there is not a market opportunity unrecognised by the commercial hire companies and that demand can be met well within the existing market. However individual projects can and do make a good case for investment of public funds in temporary structures that make them more attractive to audiences and to this extent there is an opportunity that could be developed.

Putting on outdoor cultural events in temporary venues is an expensive business and one that often has considerable economic benefits to the region that do not accrue to the promoter of the event. The report recommends that if public Agencies wish to develop these activities and their associated economic impacts that they directly support certain key events which meet their criteria.

The report recommends that SEEDA join with others to commission region-wide research into the economic, cultural and social impact of cultural festivals and events, focussing particularly on audiences and spending, to provide an evidence base for its future investment decisions.

## 2. Introduction

SEEDA is the Regional Development Agency for the South East of England responsible for economic growth, prosperity and improving the quality of life in rural and urban communities. Its Regional Economic Strategy seeks to promote culture as an economic catalyst in developing underperforming areas and growth poles in the Coastal Towns and Diamonds for Investment.

Culture and the Creative Industries is a cross cutting theme in the Regional Economic Strategy forming an integral part of the key themes of enterprise, innovation and creativity, skills, transport and physical development, employment and sustainable prosperity.

Festivals and Events, many of them delivered outdoors, provide a significant contribution to the creative and visitor economy in the South East. They can provide an excellent return to local economies for modest investment and in the current economic circumstances it is vital to ensure the success of these outdoor cultural events and position them to achieve the greatest impact from the build up to London 2012.

This report considers whether a more innovative approach to outdoor temporary structures for use at these events could improve the combined cultural and visitor offer in the South East, and whether temporary structures could act as visitor attractions in their own right. It analyses the business case for investment in outdoor temporary structures for use within the South East. Whilst the project focuses on Margate, Folkestone and Brighton as examples it draws conclusions for the whole of the South East. The specific questions considered by the research were:

- What evidence exists to assess the impact of outdoor cultural events in general and how could the impact of innovative temporary structures best be considered?
- What examples of best practice exist for innovative temporary structures and how are they resourced?
- What options for innovative temporary structures are available and is there a demand from promoters of outdoor cultural events to use them?
- Is there a market opportunity and business case for investment in innovative temporary structures for outdoor cultural events?

### 2.1 Definitions and Parameters

In conducting the research there has been considerable discussion about what constitutes a temporary structure and what can be considered cultural event. It is therefore necessary to define the parameters of these within the context of this report.

It is important to make clear that this report takes a broad view of what constitutes a cultural event. These can range from weekend camping pop festivals such as the Reading Festival to street arts celebrations like the Winchester Hat Fair and could include events as diverse as Food Festivals and Contemporary Art Exhibitions. The terms *Festivals* and *Events* are also interchangeable in this report. The temporary structures discussed could just as easily be used for a sporting event as a prom concert. The defining factor is that they take place outdoors. Similarly the word

*Promoter* is used to cover all types of people and organisations that put on these events.

Although this report does not focus on arts events to any great extent it is worth considering the Arts Council England definition of outdoor arts activity as follows: “Street arts, tented circus, carnival, celebratory and participatory arts, spectacle, community arts and art in the public realm. The work is often free to the public and can be presented as part of a programme, festival or as a standalone event e.g. Carnival”

In researching this report consideration has also been given to architectural structures for semi-permanent buildings like the pavilions that are constructed every year at the Serpentine Gallery in London and the upcoming Expo in Shanghai in 2010 with its country pavilions. A particular South East example is the proposed Milton Keynes Pavilion to provide additional exhibition and education space with a five year lifespan. However these, along with freestanding installations whose purpose is mostly aesthetic rather than practical, like Tonkin Liu’s ‘Fresh Flower’ mobile discussion and debate venue for London Festival of Architecture 2008, have been excluded from the report.

This report therefore focuses on temporary venue structures for outdoor cultural events and it is hoped that it will be a useful handbook for promoters. To this end, and although slightly outside the scope of this report, a short overview on temporary stages is included in the Appendix.

## 2.2 Methodology

FEI used the following methodology to undertake this project:

- A review of the strategic framework and existing impact assessments for outdoor cultural events in the UK
- A market overview and literature review of research into temporary outdoor structures used in cultural events
- Research into examples of best practice in the innovative use of temporary structures for outdoor cultural events, including international examples, and an analysis of the balance of innovation, feasibility, financial viability and success in these examples.
- Interviews with festival practitioners in the three main centres, their stakeholders and other regional festival personnel to establish interest in and demand for the concept of shared facilities and to examine the potential for replicability
- An Options Appraisal of three potential temporary structures considered
- A Feasibility Study and business case analysis for investment in an outdoor temporary structure/s for use within the South East.

### 3. Strategic Framework

In undertaking this research it has been important to consider the strategic context in which this activity takes place.

#### **SEEDA/SECC Economic Impact of Culture in the South East: David Powell 2002**

The South East Cultural Consortium's report estimated that creative and cultural industries (including Arts, Design and Tourism amongst many others) provide jobs for 560,000 people and contribute an annual turnover of £46.5 billion. The sector has grown more than any other region, including London, with employment increasing by 28.4% in the South East in 1995-2000, almost double the average for England as a whole.

The report goes on to suggest that the Arts and Design sectoral grouping employs c125,000 people in the South East. Employment in this sector accounts for almost 23% of the region's Creative and Cultural Industries employment. Based on the limited data provided, IDBR provides evidence for 6,600 VAT registered Arts and Design businesses and organisations in the region generating a total turnover of about £1.4bn.

As for the Tourism sector, 23.5m UK residents and 4.05m overseas residents visited the region in 2000. The total combined spend of Tourists and Day Trippers in the South East in 2000 was £9.4bn and 263,300 people were employed in the sector.

#### **SEEDA Regional Economic Strategy 2006-2016**

Running through the Regional Economic Strategy (RES) are a number of crosscutting themes which are relevant to actions across its full breadth and Culture, Sport and Creative Industries is one such theme. A number of actions in the RES are relevant to this work on Temporary Structures.

#### **Art Council England New Landscapes: Outdoor arts development plan 2008-2011**

ACE plans to prioritise investment in high quality cross-art form and inter-disciplinary practice as well as a sustainable infrastructure of national hubs that comprises a range of existing artists, agencies, producers, festivals, buildings and related networks to develop, produce and present high quality outdoor arts work across a range of scales.

#### **London 2012 Cultural Olympiad**

The London 2012 Cultural Olympiad is a four year celebration designed to encourage the widest range of people across the whole of the UK to get involved in the London 2012 Games. The South East region is focusing its Cultural Olympiad effort in two areas, disability and deaf cultural activity and outdoor performance. The objectives are:

- To help people in this sector to develop their work and profile. Go some way to ensuring that the London 2012 Ceremonies are created in the South East and are peopled by South East artists and young people
- To be the lead region in the UK for outdoor arts.

It is within this strategic context of economic and social priority for outdoor cultural events that this work on Temporary Structures for Outdoor Cultural Events sits.

#### 4. The Economic Impact of Outdoor Cultural Events

Until now there has been very little published data on the impacts of cultural festivals in the South East in general and virtually nothing specifically on outdoor events in the region. The impacts of cultural events can be social, cultural and economic but nearly all extant studies focus primarily on the economic benefits of the events. The following impact studies have been identified for cultural events in the South East:

##### **Brighton Festival Everybody Benefits: 2004**

Although now five years out of date this study of the economic, social and cultural benefits of the three week Brighton Festival is still widely quoted across the cultural festivals and events sector. It covers the 1,200 outdoor and inside performances and events both within both the programmed festival and the open access fringe.

The report describes how Brighton Festival with nearly 500,000 attendances has become the leading mixed arts festival in England with a broad range of impacts including a £20m boost to the City's economy every May. Although no separate data is published for the outdoor events a significant proportion of this economic impact is generated by these activities. Average spending at free outdoor events, established by face to face interviews, was between £39.15 per person for local residents and £208.83 for overseas visitors to the festival.

##### **Winchester Hat Fair 2008: Economic Impact Study**

Hat Fair is Britain's longest running celebration of street arts and community. Since its inception as a buskers' festival in 1974, Hat Fair has built a renowned programme including national and international street artists. Hat Fair attracts more than 30,000 attendees a year to its events over a four day weekend in July.

Although the study focused substantially on marketing information it was established that 77% of the attendance is from visitors coming to Winchester specifically for the Hat Fair and that together all attenders spent around £1m in the Winchester economy.

##### **Canterbury Festival Audience Survey: 2002**

Canterbury Festival has an outdoor element to its programme and conducted audience research in 2002. However this produced marketing data and no economic impact research was undertaken.

##### **Folkestone Triennial 2008: Evaluation**

Richard Ings is currently completing an evaluation of the Folkestone contemporary art festival that took place in 2008, some of which was outdoors. However it is not yet published

**The South East England Festival Cluster Research 2009**, undertaken by sam in partnership with Groundwork & CommunitySense, provides a useful addition to the evidence base of the modeled direct spend of some 300 cultural festivals in the South East. The report concludes that the festivals directly contribute in the order of £39.7m GVA to the economy of the South East. However, given the lack of available data, the report makes no attempt to estimate the primary or secondary spend of audiences visiting these festivals and it is here that their substantive economic impact lies.

Given the lack of good data in this area it is recommended that SEEDA join with ACE and others to commission region-wide research into the economic, cultural and social impact of cultural festivals and events, focussing particularly on audiences and spending, to provide an evidence base for its future investment decisions.

Outside the South East there has been other impact research into cultural events:

### **Glastonbury Festival 2007**

Glastonbury Festival is a world renowned outdoor pop music festival and the largest pop music festival to be held in the UK. The economic impact report into the 2007 festival concluded that the 177,500 ticket buyers spent an average of £293.24 per person on their visit to the event, making a total spend of £52,049,930.

### **Edinburgh's Hogmanay 2004**

Edinburgh's Hogmanay is a winter festival celebrating the New Year over four days, mostly outdoors. The Economic Impact Study of all the Edinburgh Festivals undertaken in 2004/5 estimated that Hogmanay contributed £24.4m of economic output to the Edinburgh economy.

### **Notting Hill Carnival: Strategic Review 2002**

Notting Hill Carnival is the world's second biggest carnival of Caribbean culture and celebration, attracting up to 1.2m people to West London over the August Bank Holiday weekend. The wide ranging Strategic Review of 2002 estimated its economic impact to be £93m.

### **V Festival Cheltenham: The Value of V 2006**

This report commissioned by Chelmsford Borough Council looked at the economic impact of the V festival on the eastern region. 2006 was the event's eleventh year with 80,000 people attending the two day outdoor pop music festival. The combined net additional expenditure generated by the event was £8.2m.

## **4.1 Measuring the impact of innovative temporary structures**

The use of innovative temporary structures is likely to increase the cost to promoters of presenting outdoor cultural events and as a result the GVA as described in the **South East England Festival Cluster Research 2009** will also increase. However not all of the expenditure is likely to stay within the region as the suppliers of such structures are spread across the UK and abroad.

However the real impact of promoters investing in these structures will be seen in the retention of and/or increase in audiences for these events. The **South East England Festival Cluster Research 2009** does not estimate existing audience numbers at these events and audiences spending profiles only exist for a very small number of events across the region. It would therefore not be appropriate to estimate the economic impact of the audiences for outdoor cultural events or the potential increase in economic impact from the increased use of innovative temporary structures without further substantial research.

## 5. Innovative Temporary Structures – The Opportunity

Outdoor cultural events play an important part in the South East's cultural offer and visitor economy. From Reading's rock and pop Festival to Winchester's street arts Hat Fair, they attract hundreds of thousands of visitors from within and without the region.

The South East England Festival Cluster Research 2009, undertaken by sam in partnership with Groundwork & CommunitySense, identifies in excess of 300 cultural events in the region of which roughly a quarter are free outdoor events.

Festivals are becoming an increasingly popular format in which to present cultural activity. They can exploit a time limited period to convey the intensity and excitement that regular seasons often lack. They are frequently presented in unusual locations and show off an area at its best, creating a sense of place attractive to locals and visitors alike. Outdoor festivals often appeal to a younger audience than is normally attracted to cultural activity and can also be a good 'gateway' for people unfamiliar with attendance at arts events, offering easily accessible cultural experiences.

Promoters have been staging outdoor events for many years. Some of them celebrate activities that are hundreds of years old, like the Faversham Hop Festival, some of them are at the cutting edge of the contemporary arts like the new Folkestone Triennial. The region hosts some of the country's most important cultural celebrations, like the Brighton Festival now in its 43<sup>rd</sup> year and arguably England's largest multi-arts festival, second only in the UK to Edinburgh Festival, the world's leading cultural event.

Whilst many cultural events are staged exclusively outdoors, some multi-arts festivals include outdoor events, often free of charge, as elements of a wider ticketed programme. Increasingly cultural festivals are using temporary structures to create temporary venues in locations where permanent venues either do not exist or are unsuitable for one or both of the following reasons:

- They powerfully convey the notion of festival: something that is exciting and time-limited, bringing the special to the everyday. The archetype is the circus big top in the local park
- They allow promoters to present performances, events or exhibitions they otherwise could not, or present them to a better standard than they would otherwise be able to. Some festivals have no infrastructure without the construction of temporary structures – Glastonbury being the archetype, whilst others enhance their existing offer with additional structures – Edinburgh Fringe being one of the largest examples.

Brighton Festival's growing use of innovative temporary structures to attract visitors in an increasing competitive market is evident in 2009



**Chinese State Circus, Preston Park**



**Ladyboys of Bangkok, Old Stein**



**No Fit State, Hove Lawns**



**Parlure Spiegeltent, Jubilee Gardens**

In 2004 Brighton Festival commissioned sam to undertake an economic and cultural impact study that looked at the benefits of the festival for the City. This covered all the events in the Festival and Fringe and identified that of the total 430,000 attendance that year, 190,000 were attendances at free outdoor events. The headline figure for secondary spending on food, transport, accommodation, shopping and other by these audiences for the outdoor cultural events was £17.44m.

Whilst it is not possible to directly quantify how the innovative use of temporary structures like the ones shown above add to the economic impact of outdoor cultural events, it is clear that they do help to attract the increasingly large attendances that Brighton has seen in recent years. Brighton Festival's strength in outdoor events puts it ahead of all its UK rivals in this area and the innovative use of temporary structures is an important part of that success.

Although consumers of outdoor cultural festivals are primarily interested in the content of the events they have come to see, rather than the venue, there is a group of festival goers requiring an increasingly sophisticated experience. It is here that innovative temporary structures have a role to play in improving the offer and making the event more interesting.

Whilst the twentysomethings in the following picture of an event at the Sonar Festival in Barcelona may be happy to see their favorite DJ in the rather clinical surroundings of a 'white shed' large-frame marquee, the upside down inflatable purple cow shown below at the Edinburgh Festival Fringe is likely to be an added attraction for seeing your favourite comedian!



**Bass Clef at the Sonar Festival Barcelona 2007**



**The Udderbelly in Edinburgh for the 2007 Edinburgh Festival Fringe**

Some cultural festivals have gone a stage further and are creating whole outside temporary areas which are an attraction in their own right. The 2009 Norfolk and Norwich Festival for example has created The Festival Gardens, transforming Norwich's Chappelfield Gardens into a very special festival venue for two weeks. Based around two iconic temporary structures, The Spiegeltent and Levity III by Architects of Air, the Festival Gardens comprises a festival club, cabaret saloon, children's inflatable adventure playground and a two day Garden Party Extravaganza.



**Salon-Perdu Spiegeltent entrance**



**Spiegeltent in Chappelfield Gardens**



**Levity III by Architects of Air**



**Levity III by Architects of Air**

However these innovations are expensive to support and the Festival Gardens required a higher subsidy than a standard temporary venue and the Levity III would not have been able to cover its cost through admission charge alone.

## 6. Demand and Feasibility

### 6.1 Assessment of demand from key coastal towns

Personnel in three main coastal towns and cities were consulted for their views on the likely requirement and demand for temporary structures for outdoor cultural events.

#### **Brighton**

With a population of 250,000, England's largest multi-arts festival and a strong year-round creative economy, the city of Brighton and Hove is the South East's cultural powerhouse. Brighton stages hundreds of outdoor cultural events ranging from the Beachdown Festival through the Classic Car Rally to Burning the Clocks, winter solstice parade: [www.brighton-hove.gov.uk/index.cfm?request=b781](http://www.brighton-hove.gov.uk/index.cfm?request=b781). These are a mixture of commercial and subsidised events, some run by the local authority directly, some by non-profit organisations and some by private companies.

Generally there was interest in the idea of improving the quality of the temporary structures used by outdoor events although it should be noted that in May 2009 there were already two Spiegeltents and three special circus tents taking part in the Brighton Festival Fringe so standards are already high. Two issues came out strongly from the consultation.

Firstly there was a feeling that temporary structures and temporary venues, whilst often important in creating the right atmosphere for an event, were less important than the programme of events they might house and that many outdoor events were intended to be either site-specific or perambulatory and neither a venue nor covering of any kind was appropriate. In addition it was felt that any more interesting venues had to be economically viable as promoters were likely to spend their limited budgets on the content of their events rather than the venue although there were of course exceptions like the Spiegeltent where the venue almost was the event.

Secondly there was interest in the notion of improving the infrastructure of the sites regularly used to locate these temporary venues. Brighton and Hove City Council have commissioned production manager Nick Love to audit six key spaces in the city that were used for temporary outdoor activity. This will produce proposals for how to improve use of the sites and how to make best use of the spaces. It is to cover infrastructure like power and drainage and how to improve the aesthetics of the spaces and installations that use them e.g. by providing artists designed covers for the Heras fencing extensively used by the sector. It will include things like recommendations for planting schedules to be followed by the parks department to take account of the event and it is hoped will result in improved contractual arrangements between the council and operators.

#### **Folkestone**

A town of 50,000 people and once a prosperous and fashionable seaside resort, Folkestone has suffered a slow decline during the second half of the 20<sup>th</sup> century leaving it with some serious economic and social problems. To help combat these a new charity, the Creative Foundation, under the Chairmanship of Roger De Haan, is working with partners to spearhead an ambitious project through which the cultural, economic and educational landscape of the town is being transformed.

A new music venue, the Quarterhouse has just opened and a year round programme of festivals is being rolled out. At its core is a major new 3 month summer exhibition of commissioned art for the public realm, the Folkestone Triennial, planned as a major visitor attraction initially for 2008, 2011 and 2014. An evaluation of the first event is being undertaken by Richard Ings and is to be published shortly.

There was interest in the idea of temporary structures but focused mainly on the notion of temporary facilities like a visitor centre or social space for the Triennial. The creative foundation have a brief out for an architectural competition to design a visitor centre for the Triennial in the High Street but this is likely to be a permanent structure. There is interest in mobile cafe/bar structures based on the Alpine Umbrella bar concept and a UK supplier has been identified for this.

The Triennial itself consists of a series of pieces spread around the town, some indoors some outside and there was no particular practical interest in providing temporary venues or coverings for them as they are site specific in many cases.

### **Margate**

With a population of 57,000, Margate, like Folkestone sees culture as a key tool in its regeneration plans. The new Turner Contemporary is at the forefront of ambitious plans to revitalise one of the country's oldest seaside resorts. The prospect of a major new gallery is already attracting new investments, businesses and residents to the area. After many twists and turns a new non-profit organisation is due to be created in 2010, construction work has started and the new gallery is expected to open in 2011.

There is general interest in the idea of developing outdoor cultural events in Margate and the possible role that high quality temporary structures could play in these. However at the moment the focus appears to be on getting the new gallery open as soon as possible although there is potential for an outdoor festival to be created around the opening weekend.

One particular project that is of interest is the creation of temporary pavilions or structures along the seafront reflecting the past history of the area. The ambition is for artists to design and create these structures potentially for use by other artist to create work. A three year project is envisaged from 2011 to 2013 and Turner Contemporary is working with Le Frac in Dunkirk as a partner to realise this ambition. However the project requires funding and an Interreg bid has been made.

## **6.2 Assessment of demand in other areas of the South East**

### **Promoters' Views**

It is widely recognised that the South East is a region of festivals – with the **South East England Festival Cluster Research 2009** identifying over 300 events taking place annually. As part of this research and in addition to the events in Brighton, Margate and Folkestone a diverse selection of the largest were contacted to gauge interest and demand for a centrally provided resource.

**Henley Festival** is a major five day arts festival taking place exclusively outdoors on the banks of the River Thames in July each year, covering classical music to visual arts. It

uses a number of temporary structures including a covered floating stage. However nearly all of the structures are provided by the Henley Regatta which takes place in the preceding weeks. They felt that Festivals usually have very specific requirements so couldn't immediately see how a 'one-size fits all' approach could work although something affordable and useful for the programme might be interesting.

**Broadstairs Folk Week** in August started in 1965 and has built to one of the country's best loved celebrations of all kinds of traditional music and dance. Taking over the seaside town for a week at the beginning of August its main venue is a traditional Marquee pitched in Pierremont Park. The Festival would like to purchase its own temporary structure and this proposal is considered in the next section.

**Hat Fair** in Winchester is a four day street art and community event in July each year which has built a considerable reputation over 35 years. The majority of their work is either site specific or perambulatory and they do not see a possibility of using temporary structures within the budget resources they have available.

**Medway Council** organise and support five substantial festivals and events in their area, including the two week Medway Fuse and traditional Proms concerts, presenting in all 18 days of free outdoor festival activity. They hire a large number of marquees and stages over the year and are interested in improving the quality of the production and would be interested in any centrally provided resource if it helped to keep their costs down. However their main interest is improving the quality of the content of the performances and they believe this is where investment is urgently needed. They are hoping to realise the first UK Creation Centre for outdoor arts, a long held ambition of the sector.

**Canterbury Festival** is an international arts festival presenting theatre, dance and music. It is facing the loss of the Marlow Theatre which has closed for refurbishment until 2011. This could result in three festival seasons being without their main festival venue. If they don't find a temporary replacement this will lose them profile, audiences, sponsorship and long term support, although in the short term, because the programme at the Marlow is subsidised, it may not have an immediate financial impact. They are considering an alternative but this will cost more to bring up to usable standard.

Whilst Canterbury Festival believes that a 'one size fits all' solution for a temporary venue is unlikely to work they are interested in some sort of 'Kent Tent' proposal and this is considered in the next section.

### **Other events**

A number of other outdoor event producers were contacted and the concept of upping production values and sharing resources was broadly welcomed. A smallish Saddlepan structure would be eye-catching and could have the degree of flexibility which would be needed to be useful across a number of events. But in the end it depends what is going inside as a space is only any use if there is quality and suitable content to go in it.

## 6.1 Agency Views

As well as the festivals and events promoters and SEEDA there are a number of public agencies who have an interest in temporary structures for outdoor cultural events.

**London 2012**, the organisation responsible for the Cultural Olympiad, are clearly interested in developing outdoor cultural events in the run-up to the Olympics and have ambitions to make the South East the lead region for outdoor arts events. However they have no money to invest so it's unclear how their ambition to build capacity and improve infrastructure will be achieved.

**CABE**, the government's advisor on architecture, urban design and public space, have a specialist unit called CABE Space that aims to bring excellence to the design and management of parks and public space in our towns and cities. Their main interest is to ensure that practical design features are built into any new outdoor performance spaces and particularly that consideration is given to temporary cover from inclement weather, both wet and sunny, possibly using tensile structures. They would be interested to support the notion of temporary travelling pavilions or venues and were aware of a Sea Change Project that considered this but had not in the end come forward.

**Arts Council England**, South East plans to prioritise investment in high quality cross-art out-door work and is naturally interested in this concept. However it is mostly interested in supporting the work or activity taking place rather than the structures. ACE London was however one of the funders of the Lift, one of the options appraised in this report.

## 6.4 Potential business models

Putting on cultural events is an expensive business. Across the broad definition used in this report a range of different business models are used to deliver festivals and events. At one end are the purely commercial events like the 80,000 capacity Reading Festival operated by the Festival Republic group that exist almost exclusively on ticket revenue with tickets often costing hundreds of pounds. At the other end Local Authorities such as Medway Council directly operate free festivals like Fuse Medway, attracting 5,000 people, with budgets entirely paid from public funds. In the middle are not for profit companies like the one that runs Brighton Festival that operate on a mixture of commercial revenue and public subsidy.

In considering this report it has not been found that there is an overwhelming belief amongst cultural event producers that a centrally procured temporary structures resource would provide a practical solution to their needs.

However two ideas have come forward from promoters surveyed that are worth further consideration.

### **The Kent Tent**

The first idea has been put forward by Canterbury Festival. It involves the Higher Education sector and sees the structure being used both as an educational resource as well as a cultural one. This is a fledgling idea that would see the three Universities in the region combine forces to deliver a mobile structure available to Kent festivals and

events, staffed by a core team of graduates and supervised by professional staff. This would act as a one year graduate training programme for the numerous arts courses across the county and provide an un-programmed but technically ready venue to festival producers on a bookable basis over the year. It would need considerable capital and project management investment from a range of partners but the Higher Education sector involvement may make it worth considering.

This has merit in terms of building a partnership for both the capital funding and operational cost, although it would also require very careful negotiation of the partners' aims and objectives if conflicts were to be avoided. However it has potential logistical problems if a suitably experienced operator is not involved and it is hard to see how this would be of interest to a hire company.

### **Broadstairs Big Top**

Broadstairs Folk Week has recently considered an option to enable it to replace their annually hired marquee with a more innovative temporary structure. This has a 500 flat floor seating capacity and they have rented it for the last 6 years from Dover Marquees for around £4,000 per week including transport and labour for putting it up and down..

They have an ambition to purchase a new structure for their own festival and then rent it out to other festivals and events when not in use. Their business model relied on an application for funding from the Foundation for Sports and the Arts which unfortunately has just been turned down. They are unsurprisingly keen to find another public sector supporter although the model could, in theory, work without public investment.

Broadstairs have approached Roustabout Ltd to purchase a Big Top structure suitable for their site in Pierremont Park which they would install for them each year. Broadstairs recognise that they don't have the skills or experience to operate the structure and have asked Roustabout to consider storing, maintaining, hiring and installing it on behalf of Folk Week for other events at a hire charge.

The cost of the structure would be £43,500 and Roustabout estimate that it could be rented out for £2,000 for a typical 7-10 day period, giving a payback on the capital cost of 22 weeks. They further estimate that there might be a market for 4/5 weeks hire a year in addition the Folk Weeks, resulting in a 5/6 year payback period. In addition installation costs a further £2,000, depending on location, which is born by the hirer. However Roustabout would be required to store and maintain the structure and make a profit for operating it. This might leave Broadstairs £1,000 profit per hire.

The problem with this approach is that the Broadstairs site is unusual and the structure they want will need to be purpose built and although it can be used for other hirers it might limit its potential to achieve 22 weeks over its lifetime. Broadstairs are not able or willing to raise the investment commercially and providing public funds would save them £2000 a year and potentially give them a further income stream of £4/5,000 a year if project achieved its targets.

The risk: return ratio for this type of project is not sufficient for it to be of interest outside a publicly funded model.

## 7 Conclusions and Recommendations

During this research it has become clear that there are different opinions about what constitutes a temporary structure in the context of an outdoor cultural event and this report and its appendix has tried to address a broad range.

Many outdoor events will often be staged in a particular site-specific context like Medway Fuse Festival or be perambulatory like the Brighton Festival's Children's Parade. In these cases a temporary structure or venue would not be appropriate or of interest to the promoter.

It is also clear from the research and consultation that there is little interest in temporary structures as weather protection for outdoor events. Promoters of outdoor concerts such as open air Proms or commercial pop concerts do not believe it would be possible to maintain the essential experience of attending the event i.e. being outdoors, with a temporary cover. Nor do they foresee the increased likelihood of damp summers in the South East as a result of climate change being a serious commercial risk; indeed many promoters are reporting continued strong ticket sales for this season's events despite two consecutive wet summers and a severe economic crisis.

With these caveats there is great interest and some demand for temporary structures as temporary venues for cultural events in the South East and many promoters would like to use more innovative structures than they do currently.

The problem for most is one of cost. Innovative structures cost more than standard ones and promoters have not generally been able to make a commercial business case for presenting their events in more interesting venues. The exceptions are at one end, in the exclusively corporate market where different budgets apply and at the other, in the subsidised sector where sometimes other objectives can justify non-commercial considerations like the Norfolk Norwich Festival example cited earlier.

Most promoters consulted would welcome a subsidised intervention from public funds that saved cost and enabled a better customer experience to be delivered. However not surprisingly there are a wide range of requirements amongst promoters for the type of temporary venues that they wish to use based on the event and its location. There is a shared feeling amongst those consulted that a 'one size fits all' solution is unlikely.

Many innovative structures exist in the UK and overseas and are operated in both the commercial and subsidised sectors. A broad commercial hire market exists for these structures with many companies providing services from the simple marquee to the innovative, architect designed and specially commissioned structure. The festivals and event sector does not have the knowledge and experience to compete with these specialist companies.

The report concludes that, in general terms, there is not a market opportunity unrecognised by the commercial hire companies and that demand can be met well within the existing market. However individual projects can and do make a good case for investment of public funds in temporary structures that make them more attractive to audiences and to this extent there is an opportunity that could be developed.

Putting on outdoor cultural events is an expensive business and one that often has considerable economic benefits to the region that do not accrue to the promoter of the event. If public Agencies wish to develop these activities and their associated economic impacts it is recommended that they directly support certain events which meet their criteria. This could include a stipulation that supported events used more innovative outdoor temporary structures than are available in the hire market.

The lack of good data and evidence for the economic impact of Festival and Event audiences in general and for outdoor cultural events in particular makes public investment decisions difficult. It is recommended that SEEDA join with ACE and others to commission region-wide research into the economic, cultural and social impact of cultural festivals and events, focussing particularly on audiences and spending, to provide an evidence base for its future investment decisions.

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