

# Monitoring Report on City of Culture 2013

October 2014



Ilex commissioned the Strategic Investment Board to prepare this report. The information contained in the report is the result of a collaborative effort by the key stakeholders involved in the City of Culture 2013 year. It includes information received from a variety of sources including the private, public and community/voluntary sectors. It is based on data available up to September 2014 recognising that further data will become available in the future to illustrate the longer term impacts of the initiative. The data range from individual survey data to the use of econometric modelling alongside the use of individual case studies which provide supplementary information.

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## Report Highlights

### Cultural access & participation

- CoC 2013 delivered more than 400 events and it is estimated that these events generated up to 1 million attendances and participants;
- The majority (over 60%) of audiences/participants for events surveyed by Ilex were from the Derry City Council area with a further quarter from other parts of Northern Ireland and the remaining 13% from outside Northern Ireland. The proportion of those visiting from outside Northern Ireland for the six major NITB surveyed events was double this at around 25%;
- Good equality of access was achieved - over 80% of residents of the Council area attended or participated in at least one event and 33% of those attending/participating were from the most disadvantaged wards of the city;

### Economy & tourism

- While official statistics for visitor numbers to the city are not yet available, there were increases of between 14% and 85% to the main visitor attractions in the city during 2013 and the number of enquiries at the Tourist Information Centre rose by 17% in the year;
- Hotel occupancy was also significantly higher during 2013 than the previous year despite an increase in the rooms available. During the months of May to August 2013 occupancy rates were in excess of 80%, higher than Belfast rates;
- An estimated £30-35m was spent by individuals attending the various events throughout the year;
- Approximately £150m of public and private sector investment is estimated to have been secured/levered into the area as a result of the CoC 2013 designation, of which about 77% was capital investment. This includes the Translink investment on the new railway line and the new Premier Inn hotel in the city;
- On the basis of available evidence it is estimated that 300 to 400 full time equivalent jobs were created during 2013 which will have led to further jobs created as a result of multiplier effects. The main economic impacts of the City of Culture are expected to be in the long run as a result of the change in perceptions of the city.

### Image & perceptions

- Media coverage was overwhelmingly positive with peaks in coverage coinciding with the major events and the Turner Prize exhibition and award ceremony attracting the most mentions of any single event;
- Surveys of external perceptions of Derry~Londonderry showed strong agreement that CoC 2013 had improved Northern Ireland's reputation as a tourist destination and a place that can host events - over 50% of NI respondents and over 60% of RoI respondents agreed that it made them feel differently about Derry~Londonderry;
- Qualitative evidence suggests that CoC 2013 has had a particularly positive impact on local confidence and morale in the city – by the end of the year, two thirds of local business reported that the year had a positive impact on their business.

## 1. Background and Context

### Introduction

The 2009 bid to the Department for Culture Media and Sport (DCMS) promised to deliver a cultural/arts programme and associated infrastructural investment in Derry~Londonderry that would contribute to meeting a number of 'step changes' identified within the One Plan, Derry~Londonderry's Regeneration Plan taking the region up to 2020. It included five step changes focused on 1) Equality/Good Relations/Social Cohesion 2) Sustainable Cultural Environment, 3) Creative and Connected Community 4) A New Story/Reputation and 5) Economic Renaissance/Prosperity. These were identified as pre-requisites to 'drive an economic renaissance transforming levels of prosperity in our City and wider region<sup>1</sup> over a period of time.

This analysis presents the results of the short term data monitoring work undertaken and collated by Ilex during and after the UK City of Culture 2013 (CoC 2013) in Derry~Londonderry taking into account the event's contribution to the 'step changes' outlined above.

The Benefits Realisation Plan (BRP)<sup>2</sup> developed for the project by DCAL further reflected the scope of the objectives and also the timescale for their impact. The benefits listed in the BRP include the following:

- Tackling poverty & social exclusion
- Improved perceptions of the city
- Enhanced community relations
- Increase in GVA
- Training & employment opportunities
- Increased tourism
- Improving educational outcomes
- Better health & wellbeing
- Sports & physical activity participation
- Arts participation
- Heritage
- Improved opportunities for people with disabilities
- Development of the creative industries/digital economy
- Urban regeneration

Each of these benefits has a number of indicators and the BRP also has initial targets for each of these indicators for 2014 and final targets for 2020. This monitoring report provides current data available for of these indicators.

The impacts of the City of Culture on the city's economy in 2013 need to be considered within this context of a longer term transformational change in the economic fortunes of the city. Any initial impacts therefore represent what is envisaged as the first round of impacts in building Derry~Londonderry's legacy as the 2013 UK City of Culture.

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<sup>1</sup> 'Cracking the Culture Code – Derry~Londonderry UK City of Culture 2013 Bid Document

<sup>2</sup> July 2013

Following the announcement of the CoC 2013 award, Ilex entered into a formal Memorandum of Understanding (MoU)<sup>3</sup> with the key stakeholders, including the main Departmental funders. Ilex's primary role was delivery of the Venue and Turner Prize infrastructure but it also undertook to put in place a 'monitoring framework' to ensure that the data relating to events during 2013 would be successfully captured. The primary objective of the framework was to facilitate ongoing feedback to the Senior Responsible Officer in Derry City Council and support government in monitoring the City of Culture Programme for Government (2011-2015) milestones/targets. Additionally, in line with the MoU, Ilex aimed to ensure the necessary data for ex-post evaluations was secured and collated.

The monitoring framework is illustrated in Annex A. It shows the diverse sources identified pre-2013 likely to provide useful data and this formed the basis for the monitoring during the year. A small monitoring group was established to support the process representing the key sources of data. It included representatives from Ilex, Derry City Council, the Culture Company, Visit Derry (CVCB), NITB and Velocity Worldwide. The group met regularly during the year. Ilex availed of an additional staff member provided by the Northern Ireland Statistics and Research Agency (NISRA) who supported the collection and analysis of the data.

### Monitoring methodology

The first comprehensive programme of events was finalised in February 2013.<sup>4</sup> Analysis and review of this programme led to the identification of a number of key events that Ilex would monitor (see Annex B). These events were chosen using a number of criteria including their scale, age profile of attendees, gender, geographic spread of expected audience i.e. has the event an international, national or local reach and whether it was a free or paid event. These criteria were intended to ensure that the data collected was representative of the year and as such would provide a robust evidence base for monitoring the impacts.

Ilex worked in partnership with North West Volunteers to recruit and train a pool of volunteers to conduct survey work during the year. Over 25 individuals volunteered, taking part and receiving training in survey methods conducted by NISRA staff.

In addition to Ilex's own survey work, NITB and Derry City Council commissioned additional survey work on a further seven events. NITB commissioned surveys on The Return of Colmcille, The Walled City Tattoo, Fleadh Cheoil na hEireann, The Turner Prize and Lumiere. Derry City Council agreed to commission survey work in relation to St. Patrick's Day Festival and the Foyle Halloween Carnival.

DSD, who funded a number of Community Engagement Officers within neighbourhoods provided ongoing monitoring data to Ilex as part of the overall monitoring framework with a specific focus on the City of Culture Neighbourhood impacts.

Other key informants included Derry City Council, DCAL, SIB, NISRA, Derry Visitor and Convention Bureau, Millennium Forum (Ticket Sales), City Centre Initiative (city centre footfall), Translink for travel data on public transport, the Chamber of Commerce for Business Confidence and local media on-line surveys.

The Citi-scope Citizens Survey in 2012 which provided some of the baseline data for the CoC 2013 is not due to be re-run until 2015 and is therefore not included in this report.

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<sup>3</sup> Memorandum of Understanding, Ilex, OFMdfM, DCC, CoC, DSD 3<sup>rd</sup> July 2012

<sup>4</sup> Derry~Londonderry CoC 2013 Event Guide, Second Edition, Mar 2013

### Scale of the monitoring

The scale of the 2013 year as measured by the number of events and range of activities is considerable; CoC 2013 estimated a minimum of 400 separate elements within the year some of which had extensive sub-programmes. Other ex-post measures show that *The Venue 2013* was used on 170 days during the year, in excess of 100,000 attendees were at events in 'The Venue 2013' and over 170,000 persons were at events located on Ebrington Square. There were an additional 53,000 attendees at the Turner Prize in just over two months.

In total, over 11,000 people have been directly surveyed in relation to the City of Culture. (See Annex C for list of statistical sources). Such a number provides a useful reference dataset enabling cross-checking and further testing.

### Context of the monitoring

The decision to award the UK City of Culture 2013 designation to Derry~Londonderry in 2010 was widely accepted to be a key step in the development and transformation of the city. The city has suffered for many decades from high unemployment and low levels of investment but the events leading up to the City of Culture year raised expectations of a transformation in the fortunes of the city. The success of the CoC 2013 bid represented the culmination of a series of events that had taken place in the city, including the conclusion of the Bloody Sunday Inquiry which vindicated those killed on that day and the building of the Peace Bridge across the river Foyle. It was considered as symbolic that the Peace Bridge linked the former Army barracks at Ebrington with the west bank of the city and Ebrington Square was also the location for the Culture Company offices. The success of the bid therefore generated a widespread sense of confidence in a new future and created a significant challenge for the delivery of the programme.

In the event the funding envisaged to support the bid was less than anticipated by the bid team and the proposed programme had to be scaled back. Nevertheless, a substantial programme of events was announced at the launch event in November 2012 although the final details of over 400 events were not confirmed until March 2013.

The year began with the launch event which was the 'Sons & Daughters' concert featuring many of the city's most famous musicians in a televised concert in The Venue, which was the purpose built temporary venue on the Ebrington site. While there were a number of events during the early months of the year, the programme really took off in May and June with the BBC Radio One Big Weekend on 24-26 May and the dramatic Return of Colmcille spectacle which took place on 7-8 June. The momentum continued through the summer with a number of memorable events including the Fleadh Cheoil na Eireann and the Walled City Tattoo both in August. The key events during the last few months were the Turner Prize exhibition and Lumiere at the end of November.

The expectations of the impact of CoC 2013 on the local economy were high. The original bid document for the City of Culture 2013 promised that the delivery of the cultural/arts programme and associated infrastructural investment in Derry~Londonderry would contribute to meeting the step changes outlined within the One Plan up to 2020. An ex-ante evaluation of the project, carried out by Oxford Economics in 2010, provided estimates of the potential impact on jobs and GVA which formed part of the bidding process. However these estimates were over optimistic for a number of reasons:

- The bid document assumed that the build up to CoC 2013 would be accompanied by a major capital investment programme of over £300m which would have contributed to significant



job creation and associated economic benefit but in fact this programme was limited to less than £90m;

- The scale and reach of events associated with the bid was more ambitious than the programme that was eventually confirmed in early 2013;and
- The national and international tourism industry was less buoyant in 2013 than it had been at the time of the bid leading to over optimistic projections for visitor numbers.

Oxford Economics updated their economic model during 2013 which projected that the CoC 2013 should create 850 FTE job years during 2013, of which 300 would be direct jobs and the remaining 550 would be indirect (supply chain) and induced (multiplier spending).

This report presents and analyses the results of the monitoring exercise that took place during the year of CoC 2013 but also includes some data from 2014. It is important to recognise that the impacts of the City of Culture are expected to continue well beyond 2013 as a result of increased investment and economic activity. A future evaluation needs to take account of these continuing impacts and not just the short term effects covered by this report.

### Structure of report

The report on the monitoring data is set out under the following headings:

- Cultural access and participation – which provides details of audience/participant numbers, , transport and community engagement;
- Economy and tourism – which looks at the tourism impacts, business impacts and employment impacts;
- Image and perceptions – which presents results of the media coverage, external perceptions and awareness and the impact on business and community confidence; and
- Conclusions - which draws together some lessons for legacy.

## 2. Cultural Access and Participation

### Introduction

One of the key principles of Derry~Londonderry's Bid to become UK City of Culture was to connect all of the local communities in the region and make the programme of events accessible to everyone. The Bid document contained a pledge 'to bring the opportunity for cultural engagement to every citizen in our City'. This included the promotion and support of engagement at all levels through innovative and creative ways so that no citizen would be left untouched by the programme of cultural opportunities and activities on offer during 2013 and beyond. This was consistent with a step change in Equality/Good Relations/Social Cohesion throughout the City of Culture programme of events.

This section presents monitoring data covering the estimated numbers of people attending and participating in CoC 2013 events, the profile of audiences and equality of access. It also provides data on the impact of the programme on community engagement and cohesion.

### Audiences and participants

The scale of the 2013 year as measured by the number of events and range of activities is considerable; CoC 2013 estimated over 400 separate elements within the year some of which had extensive sub-programmes. Other ex-post measures show that *The Venue 2013* was used on 170 days during the year with in excess of 100,000 attendees at events including One Big Weekend with 37,500 attendees alone. Over 170,000 persons were at events located on Ebrington Square. An estimated 650,000 people<sup>5</sup> are estimated to have attended the six major NI Tourist Board sponsored events – The Return of Colmcille, Fleadh Cheoil na hEireann, The Walled City Tattoo, the Turner Prize, Lumiere and the Foyle Halloween Carnival. It is estimated that up to 1 million people attended or participated in events associated with the City of Culture in Derry~Londonderry. This is almost 10 times the population of the City.

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<sup>5</sup> Of which 400,000 were unique visitors i.e. excluding individuals who have attended the same event on more than one occasion (See Section 3)



While a number of large-scale events took place over the year, a programme of small events was also put in place. To date, information from 122 funded projects has been reviewed and taken together they indicate a very broad range of benefits. This includes their role in improving the city's image, encouraging greater community participation and enhancing community relations along with the development of the local economy and skills. The project promoters perceive the most important benefits to include enhanced Arts participation (64%), an improved perception of the city (48%) and enhanced community relations (46%). Fifty-two project promoters also believed that their projects had enhanced new skills development.

To give a flavour of the benefits arising from some of the smaller projects, a brief summary of four projects funded through the City of Culture is discussed below.

**Altram**, the regional support group for Irish medium early years projects, hosted its first two-day international conference examining bilingualism and early years language immersion in Derry~Londonderry on the 25<sup>th</sup> September 2013. The conference, entitled 'Two Windows of the World', secured £9,535 City of Culture funding. Guest speakers included Dr Antonella Sorace, Professor of Development Statistics at the University of Edinburgh and Dr Piet Van de Craen from Vrije University in Brussels. Delegates from both sides of the community attended the Conference. Rev David Latimer from the First Derry Presbyterian Church discussed the positive role played by Presbyterians in the revival of the Irish language. In total 121 people attended the conference. Over 90% came from outside the Derry City Council area. Of the delegates attending 45 stayed overnight in the locality and a further 22 remained in the city for an extra day to take in the sights.

Quercus Ensemble is a chamber music ensemble based in the City. Its project, entitled '**Celebration of Youth – Inspire-Aspire**', had four main objectives 1) to provide a vibrant, live classical music experience for KS2 primary school children 2) facilitate skill development in the area of chamber music 3) contribute to audience development by coordinating impromptu 'flash mob' performances in public venues across the City and 4) inspire young musicians and audiences with high quality and engaging musical performances. The project ran from the 10<sup>th</sup> to the 24<sup>th</sup> November 2013 and secured £5,000 funding through the Music Promise Small Grants Award. The projects principal contribution was towards Arts participation. This included the attendance of 450 to 550 children at workshops. This was organized through three sets of partners involving cross-denominational schools within walking distance of one another.

The 11<sup>th</sup> **City of Derry Guitar Festival** took place from the 22<sup>nd</sup> to the 25<sup>th</sup> August facilitated through the Music Department at the North West Regional College. The grant amount awarded was £7,000. The Festival included a series of concerts involving performances from both national/international artists and local students. Ten participants came from Great Britain and the Republic of Ireland. A total of 200 people attended the four concerts. A new piece of music was commissioned from English composer Paul Coles and performed by the City of Derry Guitar Festival Ensemble. This was filmed and shared on YouTube. In addition, there were four free lunchtime concerts in the run up to the Festival at a location on the city walls along with a free taster session to encourage involvement. The Festival also included a number of courses offered at the NWRC which aimed to offer a relaxed learning environment in which guitarists could exchange knowledge and improve skills. Forty individuals participated in these courses.

Bridgeen Gillespie, an illustrator and designer from the city, was commissioned to design a collection of fabrics along with a **heritage quilt** in celebration of Derry~Londonderry's year as City of Culture. The grant amount awarded was £8,000. A local digital artist along with twenty-one cross-community quilters who had volunteered to take part produced the quilt. This included two quilters from Donegal. Bridgeen also liaised with Culture Tech to exhibit the Quilt as part of their digital art exhibition. The project represented a celebration of shared history including the strong textile tradition, the local architecture as well as emerging digital skills in the city. Bridgeen held a workshop at St Peter's Hall in the city along with exhibitions at the Waterside Theatre, Derry Visitor and Convention Bureau, the Verbal Arts Centre and Central Library.

### Profile of audiences

City of Culture 2013 events attracted a wide range of audiences and participants. The larger events attracted wider participation from outside the City while the smaller events tended to focus more on local residents. The table below shows the source of visitors for the 25 main events taken from two key sources. The first reflects attendances at the six major NITB funded events – The Return of Colmcille, Fleadh Cheoil na hEireann, The Walled City Tattoo, The Turner Prize, Lumiere and the Foyle Halloween Carnival (further analysis of the impact of these events on the tourism economy of the city). The second reflects the findings from 19 surveys commissioned by Ilex relating to key events<sup>6</sup> including One Big Weekend, Hofesh Shechter and Celtronic is provided in the next section.

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<sup>6</sup> See Appendix B for the list of surveys

**Table 2.1 Source of visitors to main CoC 2013 events**

Source	Major Tourism events <sup>7</sup> (6)	Other major events (19)	All major events (25)
Derry City Council area	45%	61%	48%
Rest of Northern Ireland	29%	26%	29%
Outside Northern Ireland	26%	13%	23%
Total	100%	100%	100%

(Source: NITB Evaluation Reports, Ilex Event surveys)

Note: both NITB and Ilex surveyed The Turner Prize

The majority of attendances (55%) at the six major NITB funded events came from outside the City Council area. The share of visitors from outside Northern Ireland ranged from 40% for the Fleadh Cheoil na hEireann to 13% for The Walled City Tattoo.

Evidence from Ilex surveys suggests that attendance at events was mainly by those people resident in the council area of Derry~Londonderry. It is estimated that 61% of those surveyed resided in the council area. Of the 39% from outside the City, 26% came from the rest of Northern Ireland (NI) including 5% who were estimated to live in Belfast. The remaining 13% came from outside Northern Ireland. If One Big Weekend is excluded the share of audiences from outside the city is 34%.

The majority of audiences/participants in the remaining 2013 City of Culture events are likely to have been predominantly local to the City and surrounding area.

There was a greater tendency of females to attend events than males and the age profile of respondents (16+) shows that the proportion of young people aged 16-24 attending events was higher than population averages (see Tables below).

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<sup>7</sup> Funded by NITB

**Table 2.2 Gender profile of those attending CoC 2013 events**

Gender	Attended a City of Culture event?		2011 Census	
	Yes	No	Derry LGD	NI
<b>Male</b>	44%	48%	49%	49%
<b>Female</b>	56%	51%	51%	51%

(Source: Ebrington Square /Peace Bridge survey, NISRA – Census 2011)

**Table 2.3: Age profile of those attending CoC 2013 events**

Age	Attended a City of Culture event?		2011 Census	
	Yes	No	Derry LGD	NI
<b>16-17</b>	8%	8%	4%	4%
<b>18-24</b>	17%	10%	13%	12%
<b>25-44</b>	31%	24%	36%	35%
<b>45-64</b>	34%	34%	31%	31%
<b>65+</b>	9%	25%	15%	18%

(Source: Ebrington Square /Peace Bridge survey, NISRA – Census 2011)

### Satisfaction with events

There were high levels of satisfaction with CoC 2013 events. The Peace Bridge City-wide survey<sup>8</sup> (July 2013) found 80% rated the City of Culture Year with a score of 7 or more out of 10 with this increasing to 88% for those who had attended events. This was corroborated by other independent surveys. For example, the Londonderry Sentinel CoC Survey which found that 63% of those who completed the survey rated the CoC year as ‘the best thing ever’ or ‘pretty good’<sup>9</sup>.

Evidence from the NITB evaluations of the six major events also showed exceptionally high levels of satisfaction.

**Table 2.4: Levels of satisfaction with major events**

	The Return of Colmcille	Fleadh Cheoil na hEireann	The Walled City Tattoo	The Turner Prize	Lumiere	Foyle Halloween Carnival
Event exceeded or met expectations	95%	97%	95%	93%	96%	94%
Rated event 8 or more out of 10	84%	91%	91%	86%	89%	86%
Rated efficiency & organisation of event 8 or more out of 10	80%	91%	95%	97%	92%	88%
Would recommend the event to family and friends	99%	99%	96%	97%	100%	95%

Key: Event 1: The Return of Colmcille, Event 2: Fleadh Cheoil na hEireann, Event 3: The Walled City Tattoo, Event 4: Turner Prize, Event 5: Lumiere, Event 6: Foyle Halloween Carnival.

(Source: NITB Evaluation Reports)

<sup>8</sup> 1,100 responses

<sup>9</sup> Londonderry Sentinel City of Culture on-line survey 2013– total number of respondents 308, self selecting

## Transport

The majority of people (58%) surveyed travelled to the events by private vehicle and a further 9% indicated that they utilised some form of public transport. This is reflected in an increase in passenger journeys on Translink bus and rail services. During 2013 Translink recorded an 18.2% increase in rail passenger journeys on the Coleraine–Derry~Londonderry line<sup>10</sup> and a 4.9% increase in bus passenger journeys to the city compared with 2012.

The number of passengers using City of Derry Airport in 2013 fell by around 3.5% but this reflected difficult trading conditions and a fall in the number of flights. The decline could have been greater without the CoC 2013 and the Airport reported that it saw some increased activity associated with the largest CoC 2013 events such as Fleadh Cheoil na hEireann and Radio One's One Big Weekend. Airporter, the private coach company that provides scheduled bus services between Derry~Londonderry and the two Belfast airports, reported an increase of 10% in passenger carryings in 2013 compared with 2012. They also experienced a 50% increase in private hire / chartered services which was new business specifically for 2013 events.

## Community engagement and cohesion

The first 'step change' set out in the bid document for CoC 2013 was expressed as follows: *"We will deliver step changes in equality, good relations and social cohesion through culturally led regeneration"*. It was envisaged that this would be delivered through positive economic impacts of cultural regeneration on disadvantaged communities as well as through strengthening community cohesion and good relations in the city.

## Equality of access

One of the primary objectives of the CoC 2013 was to ensure equality of access so that local communities in the city were engaged by the programme and to contribute towards improving good relations. A range of data are available on the extent to which this has been achieved. Further information will come from the Citi-scope survey of CoC 2013 on community engagement which is expected to be carried out in the next 6-12 months.

The Ebrington Square / Peace Bridge survey estimated that 81% of those who lived in the Council area had attended a City of Culture event. This survey also indicated that 33% of those who attended an event lived in those Derry-Londonderry Super Output Areas (SOA's) that are within the top ten% deprived SOA's in NI areas. This means that 83% of Derry-Londonderry residents living in an SOA ranked within the top 10% deprived SOAs in NI attended a City of Culture event illustrating the inclusivity of the CoC programme of events.

Ilex also carried out analysis on those who were resident in areas within Derry-Londonderry that are ranked within the top 10% areas of deprivation in NI, as measured by the NI Multiple Deprivation Measure. Postcode analysis allows for an examination of attendance of those from such areas. Overall, it is estimated that 22% of those who attended the events, surveyed by Ilex, resided in those Derry-Londonderry Super Output Areas (SOA's) that are within the top 10% deprived SOA's in NI. This proportion is similar to the total population of these SOA's as a proportion of the population of Derry-Londonderry (25%) which would indicate that the audiences were therefore largely reflective

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<sup>10</sup> The line was undergoing a major capital investment between August 2012 and March 2013 and operated a restricted service so this increase is for the period April to July during which comparisons can be made

of the socio-economic profile of the area. This is also similar to the level of adult arts participation in the 10% most deprived areas in Northern Ireland (23%)<sup>11</sup>.

The programme also appears to have reached all community backgrounds. Of those who attended a City of Culture event, 63% came from a Catholic community background and 19% from a Protestant community background. This is broadly representative of the community background of the City Council area as a whole.

**Table 2.5: Analysis of attendance by community background**

Religion	Attended a City of Culture event?		2011 Census	
	Yes	No	Derry LGD	NI
<b>Catholic</b>	63%	53%	68%	41%
<b>Protestant</b>	19%	31%	19%	42%
<b>No religion</b>	9%	10%	5%	10%
<b>Prefer not to say</b>	8%	7%	8%	7%

(Source: Ebrington Square /Peace Bridge survey, NISRA – Census 2011)

Analysis by the various other S75 equality groups shows a range of results. Persons with a disability appear to have been under-represented at events relative to their proportion in the population.

**Table 2.6: Analysis of attendance by persons with a disability**

Disability	Attended a City of Culture event?		2011 Census	
	Yes	No	Derry LGD	NI
<b>Yes</b>	11%	16%	22%	21%
<b>No</b>	89%	84%	78%	79%

(Source: Ebrington Square /Peace Bridge survey, NISRA – Census 2011)

**Table 2.7: Analysis of attendance by those with dependents<sup>12</sup>**

Type of dependent	Attended a City of Culture event?	
	Yes	No
<b>Child 0-6</b>	12%	88%
<b>Child 7-16</b>	18%	82%
<b>Person with a disability</b>	8%	92%
<b>Elderly person</b>	9%	91%

(Source: Ebrington Square /Peace Bridge survey, NISRA)

<sup>11</sup> 'Impact on poverty on the engagement in Arts in Northern Ireland', DCALNI, October 2013

<sup>12</sup> Comparative information is not available from Census 2011



**Table 2.8: Analysis of attendance by marital status**

Marital status	Attended a City of Culture event?		2011 Census	
	Yes	No	Derry	NI
Single i.e. never married	43%	43%	42%	36%
Married and living with husband/wife	35%	38%	42%	48%
A civil partner in a legally recognised Civil Partnership	*	*	0.1%	0.1%
Married and separated from husband/wife	3%	*	6%	4%
Divorced	6%	*	6%	6%
Widowed	4%	9%	6%	7%
Living with Partner	8%	*	-	-

(Source: Ebrington Square /Peace Bridge survey, NISRA – Census 2011)

**Table 2.9: Analysis of attendance by sexual orientation**

Sexual orientation	Attended a City of Culture event?	
	Yes	No
Heterosexual	95%	96%
Gay/Lesbian	3%	*
Bisexual	2%	*
Other	1%	*

(Source: Ebrington Square /Peace Bridge survey, NISRA)

The main monitoring data for the measurement of this objective will come from the Citi-scope survey when the results become available next year.

A specific initiative, the Community Engagement Programme, was designed to ensure that as wide a range as possible of those living in disadvantaged communities benefited from the City of Culture designation. Further details of this programme are provided in the box below.

### **Case Study: Community Engagement Programme**

In order to ensure that community engagement in the City of Culture 2013 reached all parts of the community, a Community Engagement Programme was established which involved the appointment of Community Engagement Officers in each of the four neighbourhood renewal areas – TRIAX, Outer North, Waterside and Outer West. This involved a wide range of activities and events involving arts, culture, sports, music etc. and was targeted at all sections of the community in terms of age, gender etc.

Feedback was received from a number of individuals participating in community engagement projects on their experiences of these events. In total, 494 individuals gave their views covering 17 projects in total. A summary of the key findings highlights that:

- The majority (87%) of participants felt the activity met their expectations
- For 62% of those asked, this was the first local arts and culture event that they had attended
- 93% said that they planned to attend further local arts and culture events in the future

The general view of the events was that they were 'great'. Comments from participants included:

*'As a coach and a parent it was a fantastic & very rewarding to see different communities come together to play a soccer tournament. These types of events broaden the children's minds & breaks down barriers'.* Attendee at Oak Athletic

*'Fantastic Week, I really enjoyed learning about drugs & Alcohol.'* Attendee at Don't Drink Dribble

*'There needs to be more activities within Creggan Community, etc, more day outings, in winter time to keep young people off the streets'.* Attendee at Triax Family Outing

*'Good for Protestant to attend the Bog, I felt very safe'.* Attendee at Wan Big Weekend

In summary, the information collated to date would suggest that the City of Culture events have largely engaged with all sections of the community in Derry~Londonderry. There was significant participation by those living in the Derry City Council area and this extended to those living in the most deprived areas of the City. The programme also appears to have reached all community backgrounds. However persons with a disability appear to have been underrepresented at events.

#### Good relations

It was also intended that the City of Culture would contribute to the continuing development of good relations between the different communities in the city. An example of how this worked in practice is given in the case study over.

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## Case Study: Londonderry Bands Forum

*“Divided by history, united by music”* (inscription on presentation made by the William King Memorial Flute Band to St Joseph’s Band following joint participation in Walled City Tattoo)

### Background

The Londonderry Bands Forum was established in October 2010 and is one of the projects of St Columb's Park House, a cross community organisation based in the city. It is funded primarily by IFI through its Peace Impact Programme delivered by CFNI. The Forum currently consists of 14 bands, representing around 700-800 members plus their supporters. The aims of the Forum include providing guidance and development for Forum members, engaging in community development in disadvantaged areas, educating and creating a better understanding of the ‘banding culture’ and building relationships with other communities.

### Involvement with City of Culture

Although it was not directly funded by City of Culture, the Forum has been closely involved with a number of CoC 2013 events and activities and the member bands have diversified in ways not normally associated with the “Marching Band” stereotype. This has included participation by four bands in the Fleadh, joint involvement in the Walled City Tattoo and the production of a play about flute bands performed in various Irish cultural venues

### Impact of City of Culture

CoC 2013 provided the opportunity to push the barriers and lift good relations work in the city to a new level. Together with the Peace Bridge it has contributed to transforming Protestant attitudes to the City.

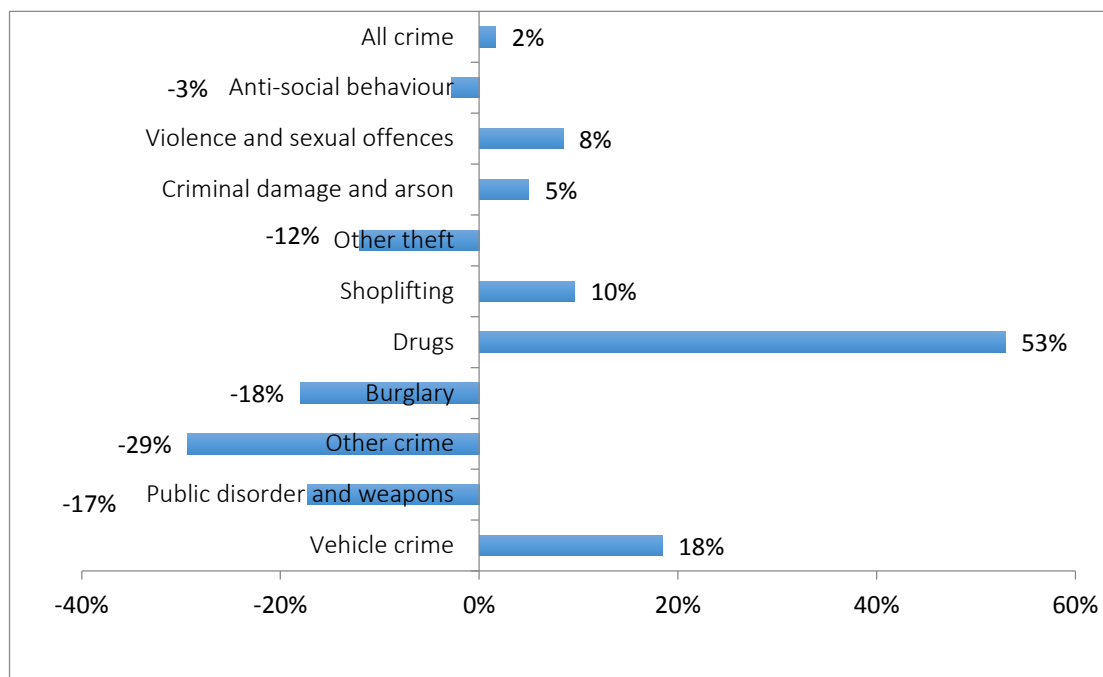
The Londonderry Bands Forum’s engagement with CoC 2013 had a positive impact on good relations in the city in a number of ways:

- It strengthened the valuable work that the Forum was already doing in PUL communities in the city and gave it a status and profile that it might not otherwise have had;
- It promoted better understanding of the band and parading culture throughout the city;
- It allowed the Forum to become involved in legacy projects in the city and to become an important stakeholder in the music culture and the future provision of musical events in the city; and
- It led to initiatives taking place in the city which would previously not have been possible, such as the participation of some bands in the Fleadh and cross community provision of music lessons.

## Levels of Anti-Social Behaviour

Another indicator of improved community cohesion is the reduced level of anti-social behaviour 2013. Recorded crime numbers in the Foyle City Centre area increased by 2% during 2013 to 3,578. The largest element of this is anti-social behaviour (35% of crimes) where the number of incidents fell during the year by 3%. Violence and sexual offences along with drugs related offences made the most significant contribution to increased crime rates in the Foyle City Centre area during 2013.

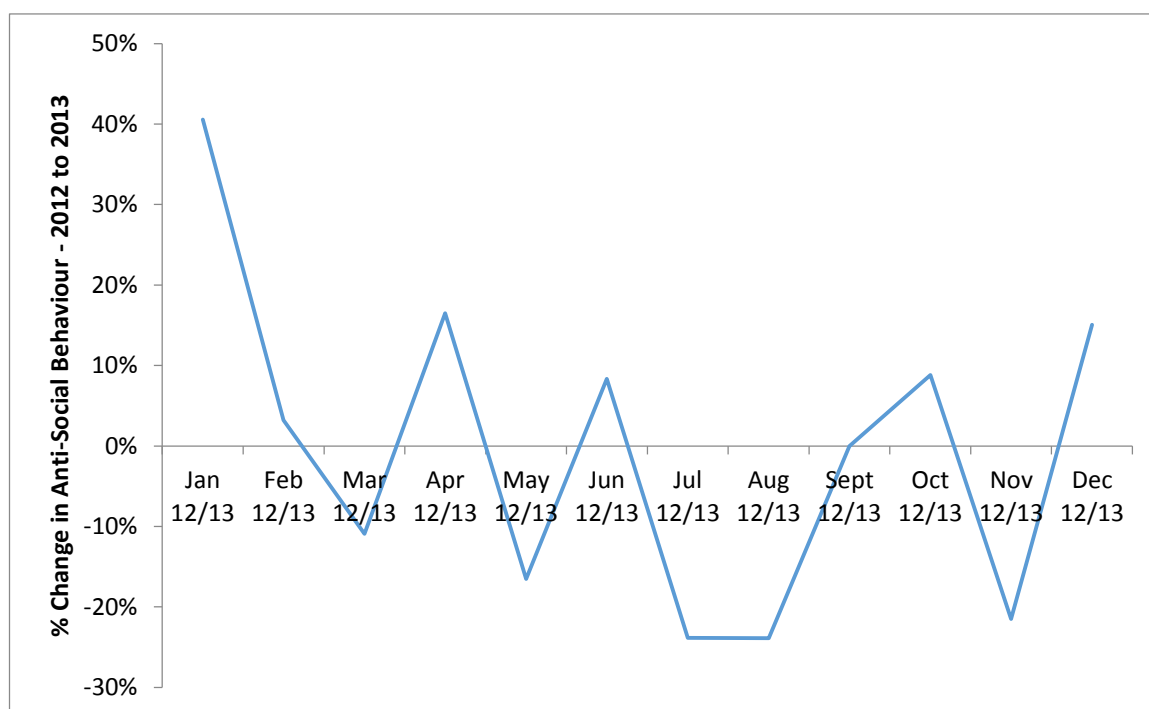
**Figure 2.1: Change in the Number of Crimes in Foyle City Centre – 2012 to 2013**



*(Source: PSNI Crime Statistics)*

The months during which some of the major City of Culture events took place actually appear to coincide with a reduction in anti-social behaviour compared to the same month in 2012. For example, during May 2013 when One Big Weekend took place, overall crime levels fell by 21% on the same month in 2012. Anti-social behaviour accounts for around one third of all recorded crime and during the critical months of July and August 2013, the level of anti-social behaviour fell by almost 24% (compared to a fall of less than 1% for Northern Ireland). It also fell in November when Lumiere and the Banks of the Foyle Halloween Festival took place (Figure 2.2). This could reflect the fact that there was an increased police presence during these events.

**Figure 2.2: Change in Anti-Social Behaviour Incidents in Foyle City Centre – 2012 to 2013**



*(Source: PSNI Crime Statistics)*

The crime level in the Foyle area as a whole, which includes the City Centre along with Foyle City North and Foyle City West, fell by almost 2% between 2012/13 and 2013/14 compared to a rise of 2% for Northern Ireland as a whole.

### 3. Economy and Tourism

#### Introduction

Attracting more visitors to the city was a key aim of the City of Culture 2013. The aim was to use tourism as a driver for economic development, both directly through tourism as a driver for visitor spend and the future growth of the visitor economy, and indirectly through changing the image of the city in order to attract inward investment and create jobs.

This section presents data on visitors to the city during 2013 including visitors to events and the effects on hotel occupancy. It also reports on the short term impacts on business during the year and concludes by examining the impacts on employment. Medium to longer-term impacts on tourism, business and employment should become apparent over the next number of years..

#### Overall tourism visitor numbers

Prior to 2013, the Derry City Council area attracted around 200,000 overnight visitors per year. Estimates compiled by NISRA estimate that in 2011-12 there were 202,000 overnight visitors to the Derry City Council area, or 5% of the NI total. This resulted in 743,000 nights and £32m of expenditure in the area. An estimated 158,000 overnight visitors (74%) were from outside Northern Ireland which at 8% was a slightly higher proportion of the NI total.

**Table 3.1: Tourism overnight visitors to Derry City Council area, 2011-12**

	All visitors	Visitors from outside NI
Trips ('000)	202	158
% of NI total	5	8
Nights ('000)	743	651
% of NI total	5	7
Expenditure (£m)	32	28
% of NI total	5	6

(Source: NISRA, Local Government District Tourism Statistics, 2011-12, December 2013)

Official overnight visitor numbers for 2013 will not be available until later this year. However some indication of the impact of CoC 2013 on visitor numbers can be taken from visitor numbers to the main tourism attractions in the city. These figures include all visitors whether from the local area, from the rest of Northern Ireland or from outside Northern Ireland.

There was a very strong performance in terms of visitor numbers to Derry's main attractions during 2013. Derry Walls attracted 411,000 visitors during 2013, an increase of 46% on 2012 and ranking it 4<sup>th</sup> in terms of Northern Ireland's top 10 Visitor Attractions during the year. Derry Walls was in fact only one of four of the top 10 attractions in Northern Ireland where visitor numbers rose during 2013. The Peace Bridge<sup>13</sup>, which while largely a thoroughfare, played an important part in events including Lumiere. There was a large annual increase with 1.2 million visitors to the Bridge, an increase of 31% on 2012. To put these figures in context, during 2013 the number of visitors to Northern Ireland wide attractions increased by 6.5%.

<sup>13</sup> Officially opened in June 2011



There were also increases in visitor numbers to other attractions within the City, particularly to Saint Columb’s Cathedral and Saint Augustine’s Church.

**Table 3.2: Visitor Attraction Performance in the Derry City Council Area, 2013**

	Visitor Numbers 2013	% Change 2012/13	% Change 2011/12
Derry Walls	411,000	+46%	+11%
Siege Heroes Museum – Apprentice Boys	8,000	+14%	-22%
Foyle Valley Railway Museum	4,492	+55%	+9.4%
Museum of Free Derry	21,313	+14%	+11.3%
Free Derry Tours	16,000	n/a	n/a
Saint Columb’s Cathedral	95,407	+85%	n/a
Saint Augustine’s Church	32,987	+85%	+43%

*(Source: Northern Ireland Visitor Attraction Survey 2013, NISRA/DETINI)*

Data has also been collected by Visit Derry on the numbers of enquiries at the Tourist Information Centre (TIC) and at the Guildhall Tourist Information Point (TIP) which began operating in June 2013. This shows that the number of enquiries at the TIC alone increased by 17% in 2013 to almost 82,500. When the Guildhall visitors are included this rises to almost 114,000. The greatest increases were from visitors from the Republic of Ireland and Northern Ireland, although the largest number of enquiries came from international visitors (61% of the total). This may partly reflect the fact that international visitors/coach tours typically arrive at the TIC.



**Table 3.3: Enquiries at the Tourist Information Centre (TIC) 2012 and 2013<sup>14</sup>**

	2012	2013	% Change 2 012-13
<b>NI Visitors</b>	12,118	17,685	46%
<b>Rol Visitors</b>	4,134	7,757	88%
<b>International</b>	54,408	57,009	5%
<b>Total</b>	<b>70,660</b>	<b>82,451</b>	<b>17%</b>

(Source: VisitDerry)

**Table 3.4: Enquiries at the TIC & Guildhall Tourist Information Point (TIP) during 2013<sup>15</sup>**

	Guildhall TIP	TIC	Total Visitors 2013	Proportion of visitors by country of origin 2013
<b>NI Visitors</b>	14,428	17,685	32,113	28%
<b>Rol Visitors</b>	4,356	7,757	12,113	11%
<b>International</b>	12,633	57,009	69,642	61%
<b>Total</b>	<b>31,417</b>	<b>82,451</b>	<b>113,868</b>	<b>100%</b>

(Source: VisitDerry)

Note: the Guildhall Tourist Information Point only opened in June 2013 so there are no previous year comparisons.

Other data on the numbers of visitors to the city in 2013 come from surveys of visitors to the main events and from hotel occupancy data.

#### Visitors to major events

Much of the tourism impact from the CoC 2013 came from a number of major events in the programme, which were part funded by the NI Tourist Board. These included the following:

- The Return of Colmcille
- Fleadh Cheoil na hEireann
- The Walled City Tattoo
- The Turner Prize
- Lumiere

In addition the annual Derry City Council Foyle Halloween Carnival received funding which allowed it to extend its programme.

NITB commissioned evaluations of each of these events based on a methodology of spectator counts and surveys, interviews with event organisers and associated analysis. The events were different in scale, nature and length but were largely free to the public (with the exception of The Walled City Tattoo) and were designed to attract visitors to the city.

As can be seen from the table below an estimated 650,000 people attended these 6 events, of which 378,000 were unique spectators (i.e. the actual number of individuals some of whom may have attended the same event on more than one occasion). The best attended event was Fleadh Cheoil na hEireann which attracted almost 400,000 attendees (of which 160,000 were unique spectators) to the city over the 8 day period and the Walled City Tattoo attracted the smallest number of

<sup>14</sup> These figures are based on staff tally's from individuals/groups

<sup>15</sup> These figures are based on staff tally's from individuals/groups

spectators at almost 14,000 over 4 evenings. Numbers to the Walled City Tattoo were restricted by the size of the venue.

**Table 3.5: Spectator numbers at major events**

Event	Period of event	Total Spectators	Unique Spectators
The Return of Colmcille	2 days	42,450	33,830
Fleadh Cheoil na hEireann	8 days	389,480	162,950
The Walled City Tattoo	4 evenings	14,620	13,980
The Turner Prize	75 days	53,700	35,640
Lumiere	4 days	96,240	84,280
Foyle Halloween Carnival	2 days	53,430	47,530
<b>Total</b>		<b>649,920</b>	<b>378,210</b>

(Source: Cogent/Millward Brown, NITB Evaluations)

For some of the events (Colmcille, Lumiere and Foyle Halloween Carnival), the majority of spectators came from the Derry City Council area but for others the majority were visitors (see table below). Fleadh Cheoil na hEireann had a particularly high proportion of visitors (40%) from outside Northern Ireland, primarily from the Republic of Ireland as this is an all-Ireland event. Together the 6 events attracted over 100,000 visitors from the rest of Northern Ireland and almost 100,000 from outside Northern Ireland to the city.

**Table 3.6: Survey based estimates of origins of unique spectators to major events**

Event	From Derry CC area		From rest of NI		From outside NI	
	%	No	%	No	%	No
The Return of Colmcille	77%	26,000	9%	3,000	14%	4,700
Fleadh Cheoil na hEireann	33%	53,800	27%	44,000	40%	65,200
The Walled City Tattoo	38%	5,300	49%	6,800	13%	1,800
The Turner Prize	41%	14,600	41%	14,600	18%	6,400
Lumiere	52%	43,800	33%	27,800	15%	12,600
Foyle Halloween Carnival	55%	26,100	29%	13,800	16%	7,600
<b>Total</b>		<b>169,600</b>		<b>110,000</b>		<b>98,300</b>

(Source: Cogent/Millward Brown, NITB Evaluations)

Evidence from Ilex surveys at a selected number of other additional events (see Annex B) suggests that attendance at events was mainly by those people resident in Derry City Council area. It is estimated that 61% of those surveyed resided in the council area. A further 26% came from the rest of Northern Ireland (NI) including 5% who were estimated to live in Belfast.

These estimates are in line with ticket sales and the geographic location of the cardholders of those buying tickets. Analysis of those people who bought tickets and provided an NI postcode indicated that 76% were from Derry, 19% came from the rest of NI and 5% came from Belfast.

Survey results estimate that 8% resided in the Republic of Ireland (RoI) and 4% resided in Great Britain (GB). It is estimated that only 1% of those attending events resided outside NI, GB or RoI.

### Accommodation occupancy

Another indicator of the numbers of visitors to the city is the level of occupancy of hotels and other visitor accommodation.

At the end of 2013 there were 10 hotels and 53 guesthouses, bed & breakfast and guest accommodation with a total of 814 rooms and 1,964 bed-spaces in Derry City Council area. During 2013 the number of accommodation providers in Derry~Londonderry increased from 46 to 63 as more Bed and Breakfasts, Guesthouses and Guest accommodation were added to the accommodation stock. Room and bed-space provision in the area was up by 8% and 9% respectively. By comparison, the number of Northern Ireland accommodation providers was largely unchanged over the year with room and bed-space provision up by just 2%. Derry~Londonderry now accounts for 7% of the accommodation stock in Northern Ireland, 7% of rooms and 8% of bed-spaces.

During 2013 the average room occupancy rate for Derry~Londonderry was 69% compared to 74% for Belfast and 54% for the rest of Northern Ireland. The average room occupancy rate for Derry~Londonderry during 2013 was 6 percentage points higher than in 2012. This differential was both positive and significantly higher than Belfast and the rest of Northern Ireland where room occupancy rate fell by 2 percentage points particularly given the significant increase in accommodation stock during the year.

**Table 3.7: Hotel Room and Bed-Space Occupancy Rates, 2012 and 2013**

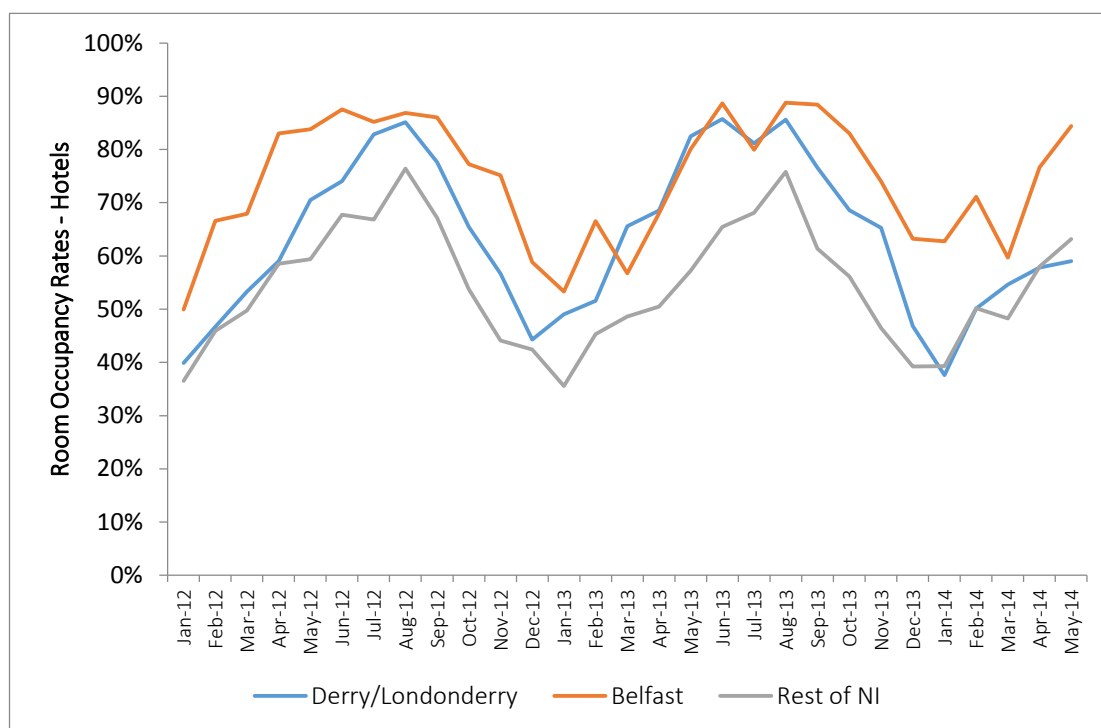
	Room Occupancy Rates			Bed-Space Occupancy Rates		
	Derry~Londonderry	Belfast	Rest of NI	Derry~Londonderry	Belfast	Rest of NI
2013	69%	74%	54%	47%	54%	39%
2012	63%	76%	56%	42%	55%	38%
% pt difference 2012 - 2013	+6%pts	-2%pts	-2%pts	+5%pts	-1%pt	+1%pt

(Source: Tourism Statistics Branch, NISRA)

There was also a similar differential in bed-space occupancy rates with the Derry~Londonderry rate up 5 percentage points during 2013 compared to a fall of 1 percentage point for Belfast and a small increase of 1 percentage point for the rest of Northern Ireland.

Monthly occupancy rates show that for most of the first half of 2013 up until August of that year, occupancy rates in Derry~Londonderry were similar to or above the average for Belfast (see chart below). Derry~Londonderry rates usually fall below the Northern Ireland average. For example, in April 2012 the hotel occupancy rate in the area was 10 percentage points below the Northern Ireland average while in the same month in 2013 it was 9 percentage points above the average. According to official statistics, occupancy rates in early 2014 have fallen back below 2013 levels.

**Figure 3.1: Monthly room occupancy rates by area, 2012-2014**



(Source: Tourism Statistics Branch, NISRA)

The performance of the hotel sector in Derry~Londonderry was also strong relative to other areas. For example, average hotel room occupancy in the Republic of Ireland was 61% in 2013, up 1% point on 2012, while in England it was 62% (up 3%pts on 2012), compared to 69% for the city.

During 2013 the highest occupancy rates were achieved over the May to August period averaging 83% and highest in August at 86%. By comparison the average hotel occupancy rate for the corresponding period in 2012 was 75%. The importance of the major events in driving higher occupancy rates is also evident at certain points during the year, particularly Fleadh Cheoil na hEireann, The Return of Colmcille and Radio One's One Big Weekend.



Figure 3.2: Monthly Hotel Occupancy Rates in Derry-Londonderry, 2013 and 2012

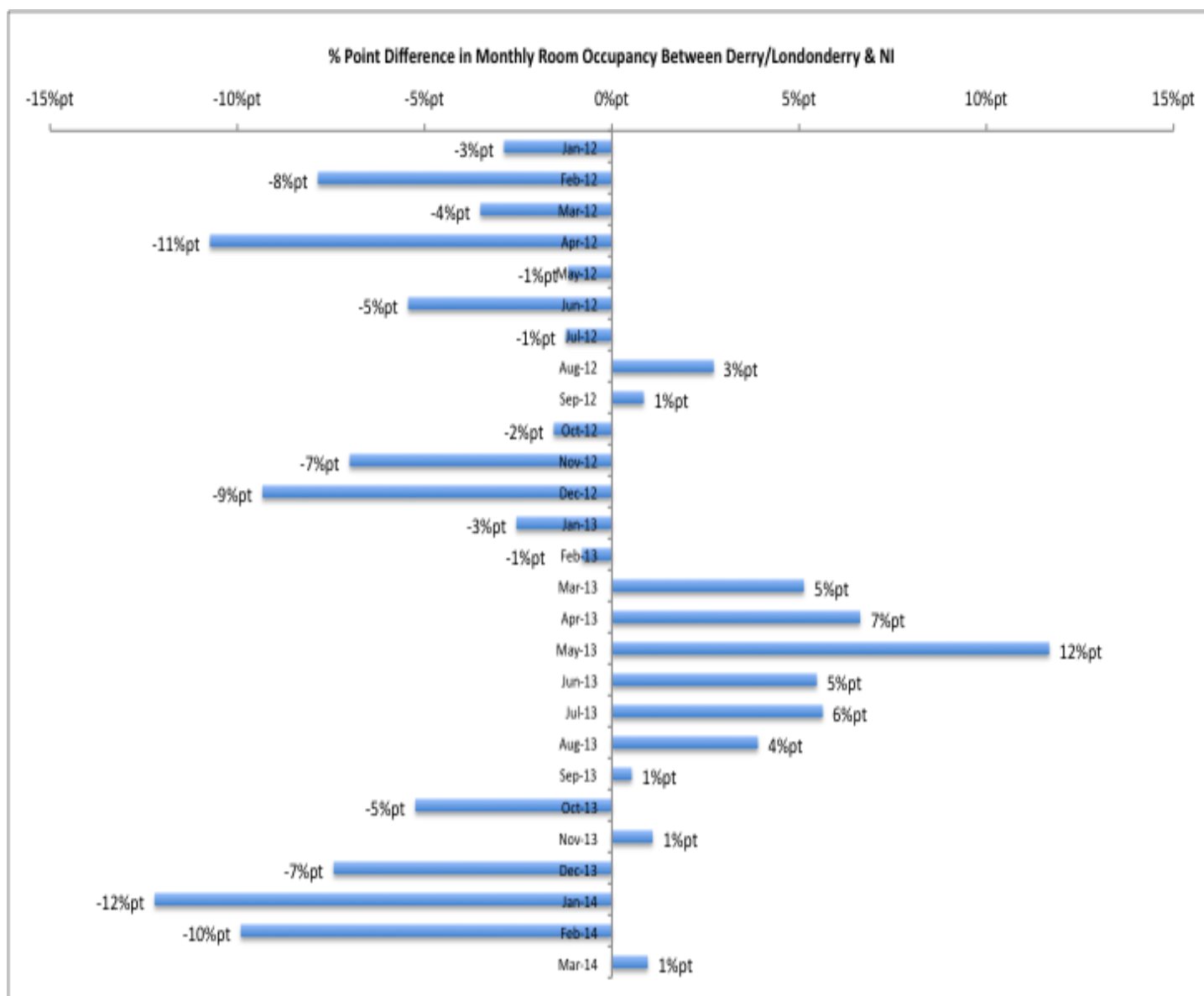


(Source: VisitDerry)

The strong performance in room occupancy rates during the months in which the large events took place during 2013 is further highlighted in Figure 3.3 over. This compares the monthly room occupancy rate in Derry~Londonderry to the Northern Ireland average. For the most part, room

occupancy rates in Derry~Londonderry during 2012 were lower than the average in Northern Ireland. During 2013 this position was largely reversed particularly between March and August where most of the large events took place. The impact of Radio One's One Big Weekend during May is of particular note. This is likely to have resulted in near full occupancy during these peak periods which will have constrained capacity in the city leading to potential displacement to other areas including nearby Donegal.

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**Figure 3.3: Differential in Monthly Room Occupancy – Derry~Londonderry &**

(Source: VisitDerry)

As with hotels, room and bed-space occupancy rates for Guest Houses and Bed & Breakfasts in Northern Ireland were down during 2013. Room occupancy fell by 1 percentage point on 2012 to 31% and bed-space occupancy by 2 percentage points to 22%. In contrast again, the North West saw room and bed-space occupancy increase over the year by 1 percentage point and 3 percentage points respectively (although remaining below the Northern Ireland average).

The combined<sup>16</sup> room and bed-space occupancy rates during 2013 for Derry~Londonderry were 63% and 34% respectively, lower than Belfast but higher than the rest of Northern Ireland.

<sup>16</sup> Including Hotels, Guest Houses, Guest Accommodation and B&Bs

**Table 3.8: Combined Hotel, Guest House, B&B Room and Bed-Space Occupancy Rates, 2012 and 2013**

	Room Occupancy Rates			Bed-Space Occupancy Rates		
	Derry~ Londonderry	Belfast	Rest of NI	Derry~ Londonderry	Belfast	Rest of NI
2013	63%	74%	45%	34%	54%	32%
2012	57%	76%	46%	38%	55%	32%
% pt difference 2012 - 2013	+6%pts	-2%pts	-1%pt	-4%pts	+1%pt	No Change

(Source: Tourism Statistics Branch, NISRA)

As with hotels, the combined sector performed strongly during 2013 in terms of room occupancy, up 6 percentage points on 2012. In both Belfast and the rest of Northern Ireland room occupancy fell by 2 percentage points and 1 percentage point respectively for all tourism accommodation types. Bed-space occupancy rates were however lower in 2013 compared to 2012 in Derry~Londonderry (down 4%pts) while up marginally in Belfast (1%pt) and unchanged in the rest of Northern Ireland.

As well as attracting tourists and other visitors to the City, CoC 2013 had an important impact on the business tourism industry allowing Visit Derry to attract conferences to the city. This is further described in the case study over.



**Case Study: City of Culture 2013 Impact on the Business Tourism Industry in Derry~Londonderry**

The UK City of Culture placed a national and international focus on the City leading up to and during 2013. This heightened positive PR and profile was used as a platform for Visit Derry and other organisations to bid for national and international conferences as well as developing new conferences as part of the 2013 City of Culture programme. Visit Derry also established their ‘Ambassador’ programme using local representatives to promote the city as a conference destination through their extensive network or industry contacts, colleagues, clients and suppliers.

There were 43 conferences secured during 2013 attracting over 8,000 delegates to the city and generating over £5m to the local economy. This represents an increase of approximately 30% in conferences bookings compared to 2012 and also an increase in the bid success ratio. The success rate in terms of conference bookings and associated delegates was significantly ahead of VisitDerry’s tourism business objectives for 2013/14.

	Target 13/14	Progress Update
Increase in no. of conferences	22	43
Increase in revenue generated	£3.3m	£5m
Increase in no. of delegates	4,400	8,050
Increase in no. of Ambassadors	120	221

Source: VISIT DERRY

High profile conferences that took place during 2013 include the European Business & Innovation Centre Network Annual Congress with 550 delegates staying 1,650 nights and the World GAA Congress with 400 delegates staying 800 nights. There was a strong international context with three to five conferences secured involving organisers from outside Northern Ireland.

There are currently 221 individuals taking part in the Ambassadors programme, almost twice the number originally targeted. This programme was shortlisted as a finalist in the Derry~Londonderry Business Awards for ‘Best Tourism Initiative’. The ‘*European Business & Innovation Centre Network Annual Congress*’ was nominated for ‘Best large-scale congress’ at the 2014 UK Conference Awards.

**Economic impact of major events**

The NI Tourist Board has commissioned evaluations of six major events, using a basic industry model. The model estimates the impact of the event in three different ways:

- a) **Economic impact** – which measures the net impact on the Northern Ireland economy by adding spend by visitors from outside Northern Ireland and subtracting ‘leakage’ arising from spend outside Northern Ireland (e.g. from organiser spend on artists, equipment etc);
- b) **Tourism impact** – which measures the net impact on tourism in Derry City Council area by including spend by visitors from the rest of Northern Ireland to Derry City Council area;

- c) **Benefit to Northern Ireland businesses** – which measures the gross expenditure on NI based businesses by all stakeholders including spectators, non-spectators and event organisers.

The economic impact analysis measures only the net impact on the Northern Ireland economy as a whole. As less than 20% of visitors to these events were from outside Northern Ireland attended events (except for Fleadh Cheoil na hEireann) and because there was significant spend by organisers on artists and equipment outside Northern Ireland, the net economic benefit to Northern Ireland is likely to be negative. This is not unusual for large events held in Northern Ireland where the objective is more about the long term impact of improving the profile for the area and attracting more visitors in the future. The analysis measures the impact of the event at the time and does not attempt to measure the longer term impact on tourism or the economy arising from the improved image of the city as a place to visit or the desire of visitors to return.

The headline results of these evaluations are provided in the table below.

**Table 3.9: Impact analysis of major events**

Event	Net Impact on NI economy	Tourism Impact in Derry City Council area	Benefit to NI Businesses
The Return of Colmcille	- £533k	- £434k	+ £1.4m
Fleadh Cheoil na hEireann	+£9.4m	+ £15.2m	+ £21.5m
The Walled City Tattoo	-£90k	+ £104k	+ £651k
The Turner Prize	- £294k	+ £322k	+ £1.42m
Lumiere	-£133k	+ £329k	+£1.78m
Banks of the Foyle Halloween Carnival (DCC)	- £12k	+ £299k	+ £690k

*(Source: Cogent/Millward Brown, NITB Evaluations)*

All the events except Colmcille showed a positive tourism impact for the City Council area, with Fleadh Cheoil na hEireann demonstrating the greatest impact driven by the numbers of spectators and high proportion coming from outside the City Council area over the 8 day event. The analysis shows that Colmcille was primarily attended by local spectators (77% from Derry City Council area) and with relatively high leakage of organiser expenditure, this is reflected in the negative tourism impact.

The benefits to Northern Ireland business are all positive as they are gross figures with the largest benefit coming from Fleadh Cheoil na hEireann. Just over one-third of traders at the Fleadh Cheoil na hEireann were from the City Council area and it is estimated that £2.8m was spent purchasing food, drink and shopping from their stalls. Unfortunately the evaluators were unable to identify separately the full benefit to businesses in Derry City Council area as it is extremely challenging to identify where suppliers purchased goods and/or services.

The six major events represent the largest element of the economic impact of CoC 2013 accounting for £27.4m of expenditure in Northern Ireland. When other events are included this is estimated to rise to an expenditure in Northern Ireland of between £30m and £35m.

### Impact on Investment

In addition to the £21.5m City of Culture programme spend, around £150m of investment was invested/secured as a result of Derry~Londonderry's City of Culture year<sup>17</sup>. This includes both accelerated spend where spend has been brought forward (Railway improvement and North West Regional Sports Campus) and spend secured for future development (Maritime Museum and Apprentice Boys of Londonderry).

Around 77% of this spend relates to capital projects, the largest being the Translink rail improvement valued at £27m. Other large public sector capital projects include the Guildhall and Harbour Museum (£9.5m) and expenditure around Ebrington including the car park and Turner Building (£9.3m).

The private sector also made a number of investments particularly in the accommodation and hospitality sectors. The most notable private sector investment was the opening of the Premier Inn (£6m), a new 60-bedroom hotel, completed in November 2012 just ahead of the City of Culture year of events.

Contributions from non-departmental public sources and other funds included the Big Lottery and Northern Ireland Screen.

**Table 3.10: Investment from Non-Department Public Sources and Other Funds During CoC 2013**

Other Funding Contributions	
Big Lottery	£1.35m
NI Screen	£1.0m
EU Cultural Fund	£937k
HLF	£500k
EU Peace Funds	£467k
Arts Co Creative Scotland	£390k
WELB	£330k
LOCOG/NAF Peace One Day	£210k
UnLtd	£65k
Arts & Business	£30k
<b>TOTAL</b>	<b>£5.3m</b>

(Source: ILEX)

### Impact on employment and business

Turning to the short term impact on employment during the year itself, it is not possible to provide precise data on the numbers of jobs created by the City of Culture particularly given the sheer number and scale of the events that took place and their overlapping objectives beyond jobs. The modelling analysis of the City of Culture undertaken by Oxford Economics estimated that 850 FTE jobs would be created in 2013, of which just over 300 were direct employment and the remaining 550 were indirect (supply chain) and induced (multiplier spending) jobs. These estimates had been updated on the basis that previous estimates were modelled on a much faster economic recovery both locally and nationally than actually took place.

<sup>17</sup> This excludes the £14.5m spend on the Peace Bridge

These 850 FTE jobs include both individuals employed, existing employees working longer hours and temporary or seasonal employment. Therefore neither the total number of people employed will rise by as much as 850 nor will the number of people unemployed fall by as much. With around 45,000 people employed in Derry City Council area, 850 full time equivalents represents less than 2% of total employment even if they were all additional persons employed.

The modelling was based on assumptions about the level of programming expenditure and the proportion of expenditure on events that was spent locally. Because of lack of local capacity in some areas of service provision (e.g. staging), this assumption may have been too high and the actual employment impacts may therefore be lower than the model estimates.

While it is not possible to monitor the actual employment outcomes against the model, one source of information on the level of additional employment attributable to the City of Culture is the Chamber of Commerce which has estimated the number of new businesses created as a result of the City of Culture:

- The Chamber estimates that almost 50 new businesses were set up in the city during 2013 of which around 80% were still in existence at June 2014;
- Of the businesses still open, 26 can be attributed to City of Culture and these businesses currently employ an estimated 150-170 people compared with over 200 in 2013.

Chamber members feel that the City of Culture status has brought very positive benefit to their own existing businesses. Here are some quotes from local businesses:

*"We increased our full time staff by five people and we employed a lot of people on a casual basis and we now have a large pool of trained staff at our disposal. Our turnover has increased and since the year ended we have been able to take on a few additional contracts. We expect the benefits to keep coming." (Business services organisation)*

*"We created an additional 8 full time and 2 part time jobs during 2013. The benefits from city of culture are great. We increased audience reach, delivered new projects, expanded activity in a variety of areas, increased visibility in the local community via programmes and improved a number of aspects of our business including communication and reporting to both audiences and stakeholders. We partnered with a range of local and international partners and funders and we are optimistic that these relationships will continue to bear fruit." (Local arts organisation)*

It is not possible to say exactly where the 850 full time equivalents have been created because this is a top down estimate. However it is possible to look from the bottom up at the sectors where employment will have increased.

The scale of a number of the major events was such that employment will have been created to meet the needs of the event organisers and of the spectators at these events. The additional employment will have been created in a number of sectors:

- **Hotels sector** – 60 additional jobs were created by the new Premier Inn and other hotels will have increased employment to deal with the increase of 22% in hotel rooms sold during the year;
- **Arts & creative industries** – a number of local businesses and community groups employed people to deliver their events and programmes as well as employment at events such as The Turner Prize and The Venue. For example, with additional funding one organisation was able to recruit upwards on 12 new posts during 2013.

- **Hospitality industry** – a number of bars, restaurants and cafes will have increased employment to meet demand and the majority of new business starts were in this sector;
- **Visitor attractions** – some additional employment was created on city tours and visitor attractions;
- **Public sector** – an average of 30 jobs over the year were created in the Culture Company itself and there may have been some additional employment in other parts of the public sector;
- **Retail sector** – retailers increased employment during the year as a result of increased visitors and also through indirect and induced employment (supply chain and multiplier effects), although there are reports of some displacement of business at major events in the city;
- **Security industry** – there was increased demand for security services at events, most of which will have been provided locally. Also there were jobs in other event-related services e.g. plant hire.
- **Transport services** – increased visitor demand resulted in additional demand for taxi and bus services.
- **Hire** – events, particularly large events, can require numerous elements to be hired to support the event/venue including equipment, catering etc.

It is reasonable to suggest on the basis of the information that is available that 300-400 direct jobs were created, including 200 estimated by the Chamber of Commerce, 60 created by the Premier Inn hotel development, 30 in the public sector, 12 in the arts and creative industries and others in other sectors.

This will have been counterbalanced to some degree by redundancies/reductions in employment in the area as part of the natural economic cycle. For example, we know that there were over 200 confirmed redundancies in Derry City Council area during 2013.

This experience is not different to that of Liverpool as European Capital of Culture where it was a number of years before the economy of the city experienced the benefits of the year. In year employment was not a targeted benefit of the Liverpool programme.

This reinforces the point that the real economic and social benefits of the City of Culture in Derry~Londonderry will only be experienced over a period of time.

Examples of other job creation impacts are provided in the case studies over.

#### Case Study: WorldHost

WorldHost is an internationally recognized customer services training programme that has been used to train over one million people worldwide. The programme is being rolled out in Northern Ireland by the NITB in partnership with People 1<sup>st</sup> with funding support from the Department of Employment and Learning.

In the last few years almost 4,000 people from Derry~Londonderry have taken part in WorldHost training representing 30 per cent of the total across Northern Ireland. They include hotel staff, shop workers and thousands of other employees who provide public services in Derry~Londonderry including the PSNI. They also include 528 volunteers. In addition 122 businesses have received a Business Recognition Award, 24 per cent of the total for Northern Ireland and second highest after Belfast. This is awarded to businesses that have trained 50% or more of their front line staff and signed a commitment to delivering excellent customer service.

Derry~Londonderry was declared as the first ever city in the UK to achieve WorldHost Recognised Destination status in March 2014 beating other WorldHost committed cities across the UK including Liverpool, Aberdeen, Worcester and Salisbury. This is an internationally recognised award to areas that have made a commitment to excellence in customer service and hospitality skills through WorldHost training programmes. It is awarded to towns and cities where 25% of businesses have reached WorldHost Recognised Business status.

Roisin McKee, director of Northern Ireland for People 1<sup>st</sup>, commented that:

*'The success of WorldHost in Derry~Londonderry stems from a unique collaborative partnership at a local level across industry and key partners such as Ilex and the council who are committed to helping the city develop as a world-class tourist destination'.*

*'The achievement of first UK WorldHost recognized city is testament to the extraordinary commitment that businesses have shown to investing in their welcome. This is a wonderful legacy of the Derry~Londonderry's year as UK City of Culture and I have no doubt that it will have a positive impact on tourism in the city in the years ahead'.*

**Case Study: Business Opportunities Programme**

The Business Opportunities Programme (BOP) was developed to provide a ‘One Stop Shop’ for businesses to get involved and benefit from City of Culture opportunities. A series of specialist training, mentoring and business development initiatives were developed to help businesses build capability and take full advantage of City of Culture 2013. The Programme has been part funded by InvestNI and the ERDF under the European Sustainable Competitiveness Programme for Northern Ireland and is due to run until March 2015.

The BOP has involved a diverse range of activities but core elements, along with key achievements to date, have included:

**Business Opportunities Programme (BOP) - Achievements to Date**

BOP Elements	Key Achievements
One Stop Shop	<ul style="list-style-type: none"> <li>• Over 2,000 attendees at BOP events</li> <li>• Oppshop Portal – 471 email subscribers, 480 Twitter &amp; 40 LinkedIn members</li> <li>• 325 business mentor relationships complete/in progress</li> <li>• Signposting to other organizations including Enterprise NW (24), DEL (20) and INI Voucher Scheme (2)</li> </ul>
Get Started for 2013	<ul style="list-style-type: none"> <li>• 4 Awareness sessions with 359 attendees</li> <li>• 4 specialist training sessions with 56 attendees</li> </ul>
The City of Culture Business Engagement & Promotion	<ul style="list-style-type: none"> <li>• Enterprise Week 2013 &amp; 2014 with 990 unique attendees, 56 events</li> <li>• Prepare to trade outdoors with 100 attendees</li> <li>• A number of information sessions e.g. OneBig weekend, Lumiere, Fleadh etc</li> <li>• Business Club events 2013 &amp; 2014 including social media and facebook for business</li> </ul>
2013 Mentor Bank	<ul style="list-style-type: none"> <li>• 325 business mentor relationships complete/in progress</li> <li>• 55 mentors recruited</li> <li>• 12 businesses secured new business (as at Dec 2013)</li> </ul>
‘Business to Business’ Procurement Support	<ul style="list-style-type: none"> <li>• 991 Businesses accessing portal</li> <li>• Procurement &amp; Marketing and Meet the Buyer events</li> </ul>
Specialist Thematic/Sector Support Programmes	<ul style="list-style-type: none"> <li>• Events including accommodation workshops (120 attendees), Wayne Hemmingway re: Clipper &amp; major events (100 attendees), Visual Merchandising Programme (81 attendees)</li> <li>• Guides including LegendDerry Food Guide and Craft in the City Guide</li> </ul>

*(Source: Derry City Council)*

**‘New Business Creation’**

The Programme has also included a ‘New Business Creation’ element, the aim was to assist 11 businesses start up creating 100 jobs in total. To date 56 businesses have been assisted and together cover a wide range of sectors including Arts/Crafts (16%), Health (13%) along with Food (11%), Retail (11%) and the Services sector (11%). An estimated 30 jobs in full-time equivalent terms have been directly attributed by businesses to Derry-Londonderry’s role as UK City of Culture.

## 4. Image and Perceptions

### Introduction

One of the major objectives of the designation of Derry~Londonderry as the UK City of Culture 2013 was to change the image of the city and the way in which it was perceived both by visitors and investors and by the residents of the city itself. This section presents data that has been collected in relation to the media coverage of CoC 2013 and on the perceptions of visitors and residents. The analysis of media coverage is based on an evaluation commissioned by the SIB and undertaken by the Gorkana Group, a company that specialises in this type of media tracking analysis.

### Media coverage

*'Most people in this once fiercely divided community would agree that their city has become a shining beacon for showing the power art has to transform and transfix'.* BBC1 News at 10

*'I didn't think #LegendDerry had enough time or money to make a success of being UK City of Culture. Well, I was wrong! It's a magical place'.* Will Gompertz, BBC Arts Editor Twitter

The Derry~Londonderry City of Culture campaign generated and tracked over 12,000 items of media coverage during 2013. Actual media mentions are likely to be higher given the huge range of events and variety of coverage of the campaign. A snapshot of the media items tracked has been reviewed to complement the social media monitoring and perception change tracking elements of the marketing communications impact. In total, 1,485 cuttings across all media types were analysed by Gorkana to represent a cross section of coverage from January to December 2013. To understand perception change and measure awareness outside the Derry city, the emphasis was placed on analysing more key national publications and key influencer publications in the UK.

Coverage of the City of Culture campaign appeared in every single UK and Republic of Ireland (RoI) newspaper. Derry~Londonderry's year as UK City of Culture was discussed on flagship news programmes across the BBC including the Today Programme, BBC News at 10 and the One Show along with RTE and Channel 4. Additionally, specific programmes were dedicated to the city's year including the BBC's The Culture Show, numerous BBC Radio 4 shows and a monthly hour-long show broadcast on the US channel Today's Ireland.

### Media Exposure of Derry~Londonderry as UK City of Culture 2013

The 12,307 items of media coverage tracked over the Derry~Londonderry City of Culture campaign generated a significant 1.9 billion Opportunities to See (OTS). OTS is the sum total of each article's readership. The 1,485 cuttings analysed by Gorkana accounted for two-thirds of this at almost 1.3bn. While Northern Ireland accounted for one half of the coverage, national and international media coverage was strong. This included online, consumer and trade titles reaching over 38 million UK adults boosting the campaign's reach. Some summary indicators include:

- The largest coverage outside Northern Ireland was UK National (23%) followed by the Republic of Ireland (12%).
- The campaign was the main focus for 62% of coverage analysed and received a significant mention in a further 20%.
- Images of Derry~Londonderry featured in 39% of coverage helping to increase audience recognition of City of Culture 2013 events.



- BBC Online (40) was the most prolific online publication followed by the Daily Mirror (23), Irish Times (21) and Guardian (17).
- The Derry Journal (Friday Edition) was the most prolific regional publication accounting for 91 pieces over the course of 2013. This was followed by the Irish News (66), Belfast Telegraph (53) and the Newsletter (51).

The tone of media coverage was overwhelmingly favourable with 99% of pieces conveying a positive message reflecting on the success of the year's many events. The Irish Times reported President Michael Higgins as stating that *'Derry's status as the City of Culture has given its people an opportunity to show the world ..... that this is an exciting city, proud of its history but also driven by vibrant communities who are determined to create a positive future for themselves'*. The Belfast Telegraph (Morning Edition) reported Phil Coulter saying that *'I think the City of Culture Programme so far has been exceptional. It was a very ambitious undertaking and there has been no shortage of cynics wanting to knock Derry, waiting for the whole thing to crash and burn. But there have been no train crashes, nothing has derailed. A lot of really good people dedicated a lot of time to make all of this happen'*. An Irish Times article praised Derry as *'living proof of the U2 lyrics that people can indeed by 'one and not the same''*. A large proportion of the Belfast Telegraph's coverage of the City of Culture 2013 campaign was strongly favourable in tone reflecting that the *'City of Culture has provided a catalyst for a surge of activity and creativity in our galleries'*. High-readership titles including The BBC Online, MSN UK, Sun, Daily Mail and Times published positive articles discussing Derry~Londonderry's year as UK City of Culture. Online media generated the highest volume of strongly favourable coverage.

Articles discussing Fleadh Cheoil na hEireann noted that Derry~Londonderry *'ticks all the right boxes'* as a tourist destination and UK City of Culture (Irish World). The Financial Times' review of the Conquest of Happiness noted that the performance, as part of the City of Culture programme, had helped to revitalize Derry~Londonderry's artistic reputation. The Guardian praised the Hofesh Shechter event while the Huffington Post added that the *'strength of the programme that has been put together is beyond impressive'*.

There was some negative coverage, largely from local commentators around council and policy issues throughout the year. Wider coverage which was more negative in tone included a piece in the Guardian which, while hailing the City of Culture year as a 'triumph' also discussed the 'uncertainty' surrounding Derry~Londonderry's arts legacy stating a 'lack of vision and ambition' could stunt its growth.

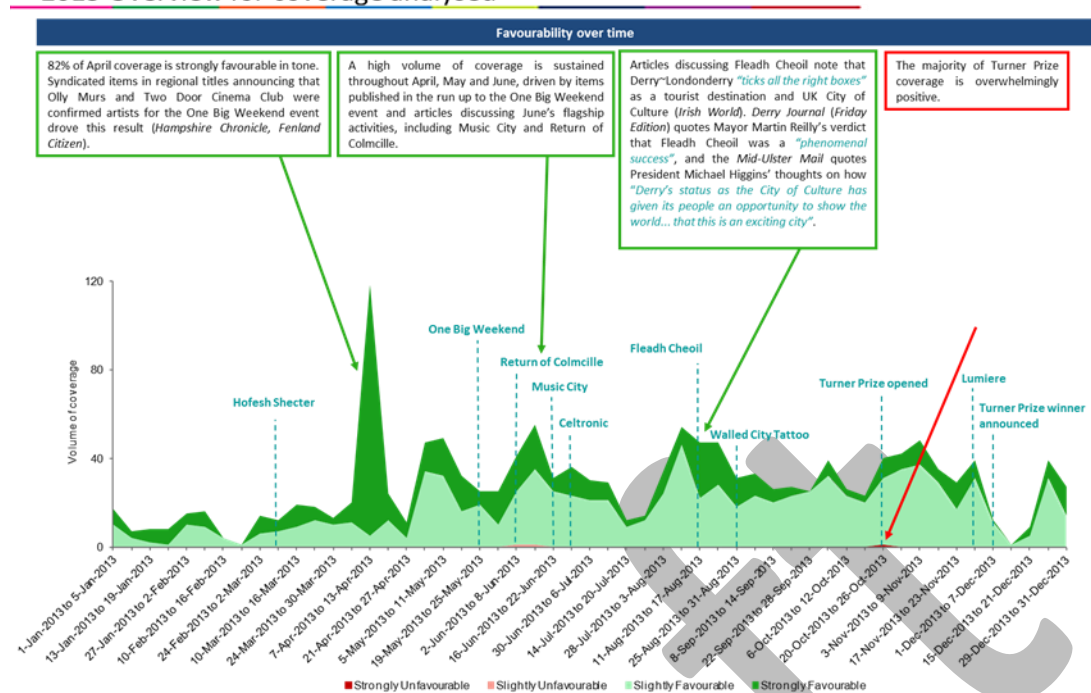
The Turner Prize was the most prolific event mentioned in analysed content accounting for 11% of campaign coverage. Pieces highlighted the Prize ceremony as part of the 'renaissance' undergone by Derry~Londonderry with the City of Culture celebrations (Daily Express). The Independent noted that *'This is the first time the prize has been held outside England and Derry – as City of Culture 2013 – has done a fantastic job'*. Items discussing the Turner Prize were a key source of national and international coverage including the Guardian and BBC Online. Richard Morrison declared the Turner Prize a turning point for Derry~Londonderry and talked about Ebrington Barracks transformation as *'not quite the fall of the Berlin Wall but for the people of Londonderry in Northern Ireland it's just as symbolic a transformation'* (The Australian).



Some 11% of The Return of Colmcille coverage appeared in national print publications including the Daily Mirror, Times and The Independent. BBC's The One Show included Frank Cottrell Boyce's prediction that *'the Return of Colmcille will be one of the most iconic events to take place in the UK City of Culture celebrations 2013'*.

Peaks in media coverage tended to surround key events during the year. There was a particularly strong peak in coverage during April with the announcement that Olly Murs and Two Door Cinema Club were confirmed artists for the Radio One's One Big Weekend event (Hampshire Chronicle, Fenland Citizen). Radio One's One Big Weekend was promoted on prominent websites including BBC Online, Huffington Post UK and Independent Online.

## 2013 Overview for coverage analysed



(Source: Gorkana City of Culture 2013 Media Evaluation)

The legacy of the City of Culture year in Derry~Londonderry was widely discussed in analysed coverage and was generally positive. The Irish Times declared that 96% of people in the city were happier about the future following the year, citing job creation, increased hotel occupancy rates and positive public attitude among the outcomes of the year's events. An April poll revealed that 71% of respondents expected the UK City of Culture would enhance community relations (Belfast Telegraph, North West) and later a Londonderry Sentinel poll reported that 45% of readers thought the City of Culture was 'the best thing ever'. Pieces discussing 'culture legacy plans' called 2013 'not a one off but the start of a long upward trend for Derry' (Derry Journal, Friday Edition). The Sunday Business Post reported that Derry should attempt to emulate the success of Marseilles, a city which saw lasting benefits from its economic boost as the European Capital of Culture.

### Delivery of Key Campaign Messages

The Derry~Londonderry City of Culture campaign focused on the delivery of three key messages 1) 'Derry~Londonderry is UK City of Culture 2013' 2) 'Come visit us and get involved in the celebrations' and 3) 'Our legacy will be regeneration of our city through culture'.

Delivery of these three messages during the campaign was high covering 91% of pieces (1,347 pieces) with over half featuring two messages of more (51%). 'Derry~Londonderry is UK City of Culture' was the most prolific message, appearing in 87% of coverage. This frequently highlighted Derry~Londonderry's status as a 'top destination for 2013' (Late Rooms).

Some 41% of national print coverage delivered the 'Come visit us and get involved in the celebrations'. Delivery of the message 'Our legacy will be regeneration of our city through culture' was highest in August driven by articles discussing 'what organizers are calling the biggest Fleadh Cheoil to date' (Irish Times). Labhras O'Murchu, the Director General of the All-Ireland Fleadh, praised Derry~Londonderry's innovation saying 'Derry has .... Raised the bar to new heights that it would be hard for others to achieve' (Belfast Telegraph, North West). Some 21% of pieces featuring

Martin Reilly, Mayor of Derry~Londonderry, featured this message including an article in Travel and Tour World which noted that the celebration ‘has created a lasting impact’ and ‘enhanced perceptions of the tourism potential of Northern Ireland’.

### Key Influencers and Journalists

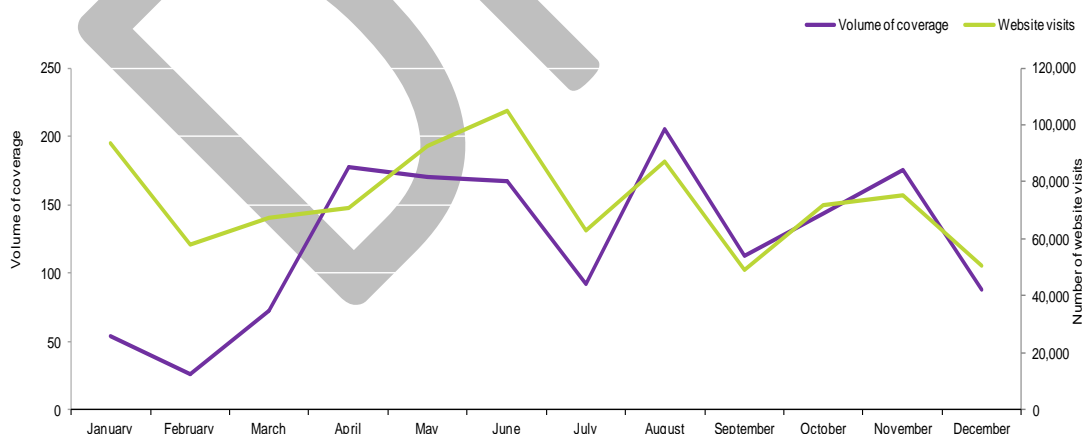
Ben Cooper, Controller for BBC Radio One, was the most quoted individual by volume of coverage accounting for 48 articles. This was followed by Shona McCarthy with 37 articles. Ms McCarthy appeared in four BBC Online articles including a piece discussing the first 100 days of Derry~Londonderry’s year as City of Culture in which she emphasized the ‘much needed economic boost’ provided by the event-filled year.

Richard Morrison was the most prominent national journalist, publishing seven articles in publications including The Times and The Australian. Articles focused on the variety of events planned for the City of Culture celebrations, highlighting Radio One’s One Big Weekend, Fleadh Cheoil na hEireann, Celtronic and Music Promise. He also reported that Ebrington Barracks had been transformed into a suitable venue for the Turner Prize (The Australian).

### City of Culture Website Traffic

During 2013 there were 5 million page views to the City of Culture website with 600,000 unique users/visits. There is a visible correlation between key events, peaks in coverage and website traffic over the 2013 City of Culture year. This was particularly the case in June with events such as Music City, Celtronic and The Return of Colmcille with over 100,000 visits to the City of Culture website in that month alone. Numbers also peaked in August with Fleadh Cheoil na hEireann and The Walled City Tattoo and Lumiere/Turner Prize in November.

**Figure 4.3: Web Traffic and Coverage**



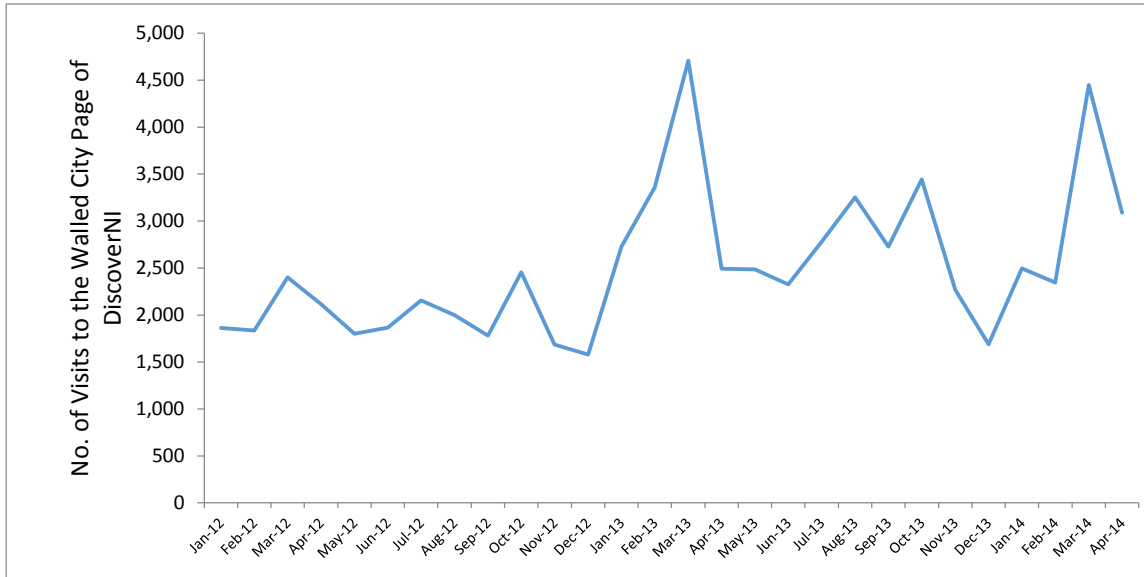
(Source: Gorkana City of Culture 2013 Media Evaluation)

The message ‘Come visit us and get involved in the celebrations’ appeared prolifically in April and November coverage, the latter correlating in a spike in activity around Lumiere. The message ‘Our legacy will be the regeneration of our city through culture’ was also prominent in August boosting public interest in the city and thus website traffic.

Walled City Website Traffic

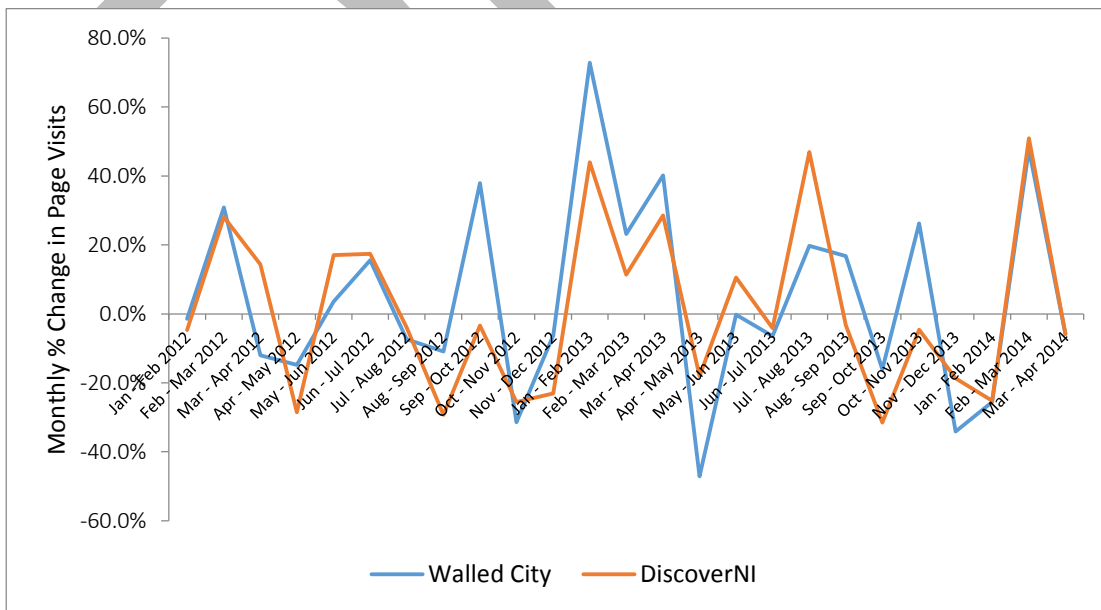
During 2013 there were just over 34,000 visits to the Walled City page of the DiscoverNI website. This was up 45% on the 2012 figure with peaks in the months of February (3,359), March (4,707), August (3,252) and October (3,443). By comparison visits to the DiscoverNI website fell by 11% during the year<sup>18</sup>. The increased ‘hits’ to the Walled City page has continued into 2014 with page visits in the first third of this year remaining 50% higher than the same period in 2012.

Figure 4.4: Visits to the Walled City Page of www.discoverNI.com



(Source: NITB)

Figure 4.5: Monthly Change in Page Visits – Walled City & DiscoverNI



(Source: NITB)

<sup>18</sup> N=974,000

### Tourism Ireland Estimate of Equivalent Advertising Value (EAV)

Tourism Ireland have also monitored all articles and media items published by international media since the Derry~Londonderry City of Culture was launched in 2010 and continue to monitor those published in 2014 that mention the City of Culture. They estimate that the Equivalent Advertising Value (EAV) relating to these articles and media items is €24.1m. This includes articles focusing specifically on the City of Culture covering 2 to 3 pages of content while others were included within a wider NI focus. This included articles in Qantas Magazine (February 2013) and The Montreal Gazette (February 2013) both of which focused on Derry~Londonderry's City of Culture status.

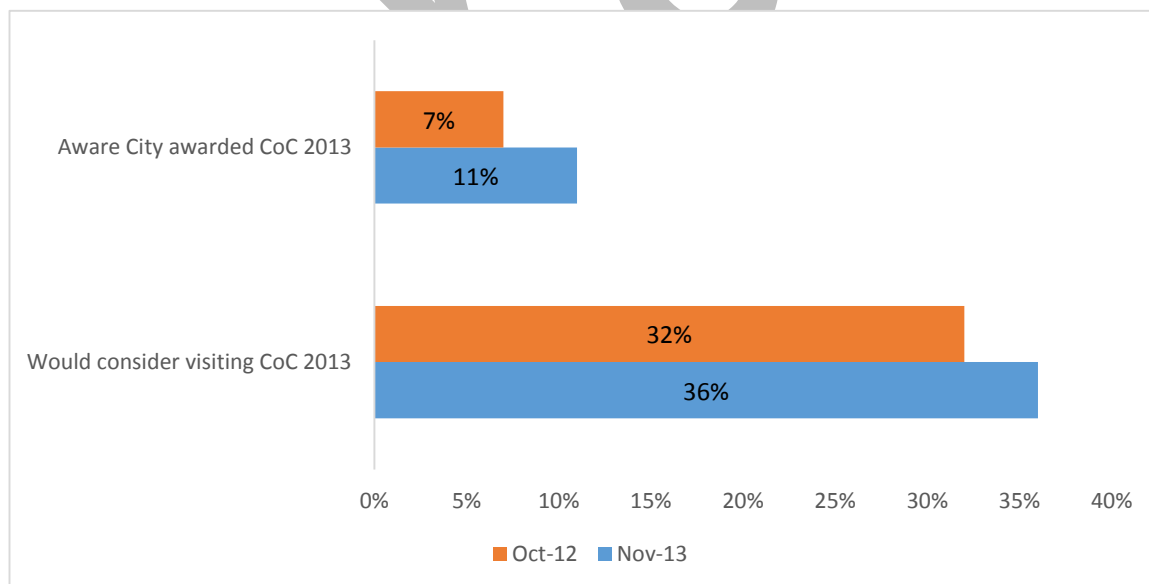
### External perceptions and awareness

Monitoring data initially focussed on measuring the general awareness that Derry~Londonderry was the UK Capital of Culture for 2013. This then moved on to measuring the impact in terms of general awareness of the city as a place to visit.

### General awareness of City of Culture status

A survey carried out for NITB in October 2012 in England, Scotland & Wales showed that only 7% of respondents were aware of the city that had been awarded the title of UK City of Culture 2013 and of these 80% knew that it was Derry~Londonderry. However 36% of those interviewed said that they would consider visiting the city (see figure below). By November 2013, awareness had increased slightly – 11% were aware of the city and 40% said they would consider visiting it. The low level of awareness may reflect the low profile of the UK City of Culture designation, for which CoC 2013 was the first, compared with the European Capital of Culture designation, which has been running for several years and is closely associated with Liverpool.

**Figure 4.6: Aware City Awarded CoC 2013 - Great Britain Residents, 2012-2013**



(Source: NITB UK City of Culture Awareness Surveys, 2012, 2013)

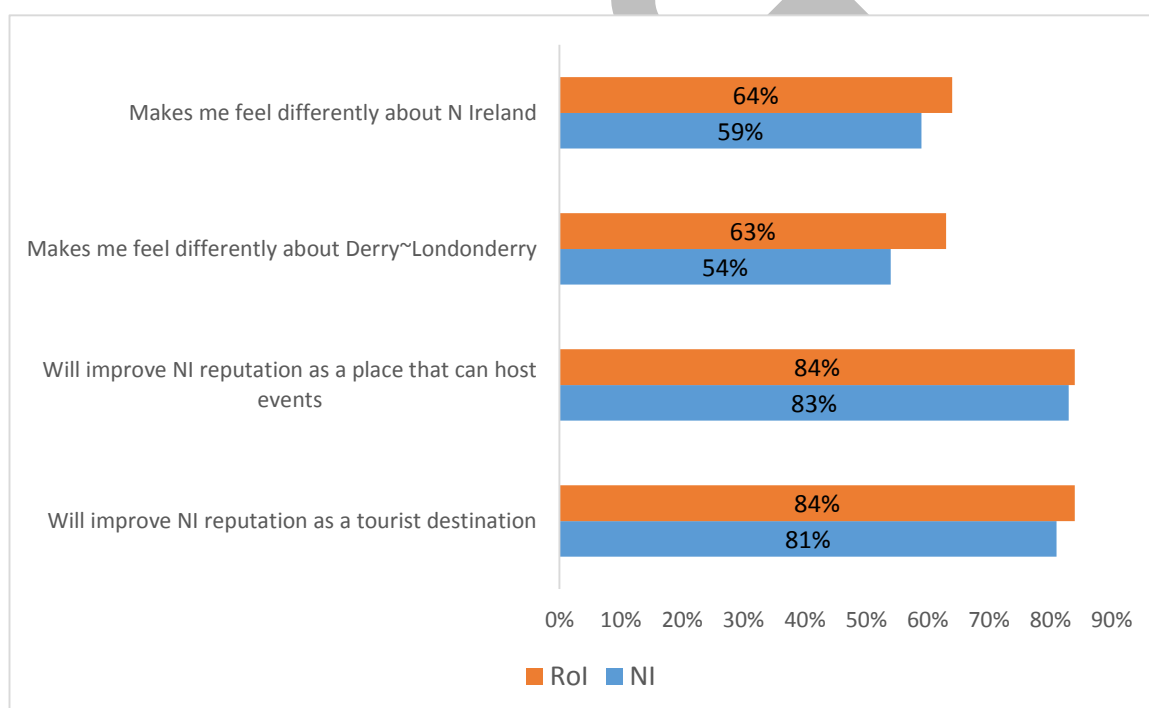
The Northern Ireland Omnibus Survey carried out in May to July 2013 found a much higher awareness of Derry~Londonderry being the City of Culture - 86% of those surveyed confirmed that they were aware of the designation. However, in the same survey only 20% said that they planned to attend any of the CoC 2013 events.

### Perceptions of Derry~Londonderry as a place to visit

As the year unfolded the success of the events had a positive impact on external perceptions. According to NITB event surveys, over 90% of attendees at the six major events agreed or strongly agreed with statements that the event created a sense of excitement, that it improved Northern Ireland's reputation as a tourist destination, that it made them more likely to recommend friends and family to visit Northern Ireland and (for spectators from outside NI) that it made NI worth the visit.

Feedback from the NITB Leisure Consumer Barometer Survey in August 2013, which is undertaken with 1,000 households in NI and 1,000 in the Republic of Ireland (RoI), showed strong agreement that CoC 2013 had improved Northern Ireland's reputation as a tourist destination and a place that can host events (see figure below). Over 50% of NI respondents and over 60% of RoI respondents agreed that it made them feel differently about Derry~Londonderry.

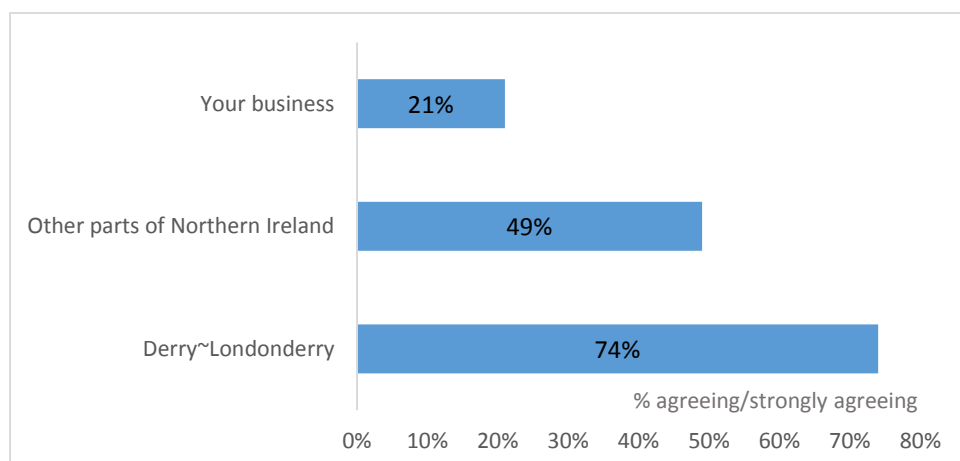
**Figure 4.7: Impact of CoC 2013 on perceptions of Derry~Londonderry and Northern Ireland**



(Source: NITB Leisure Consumer Barometer Survey, August 2013)

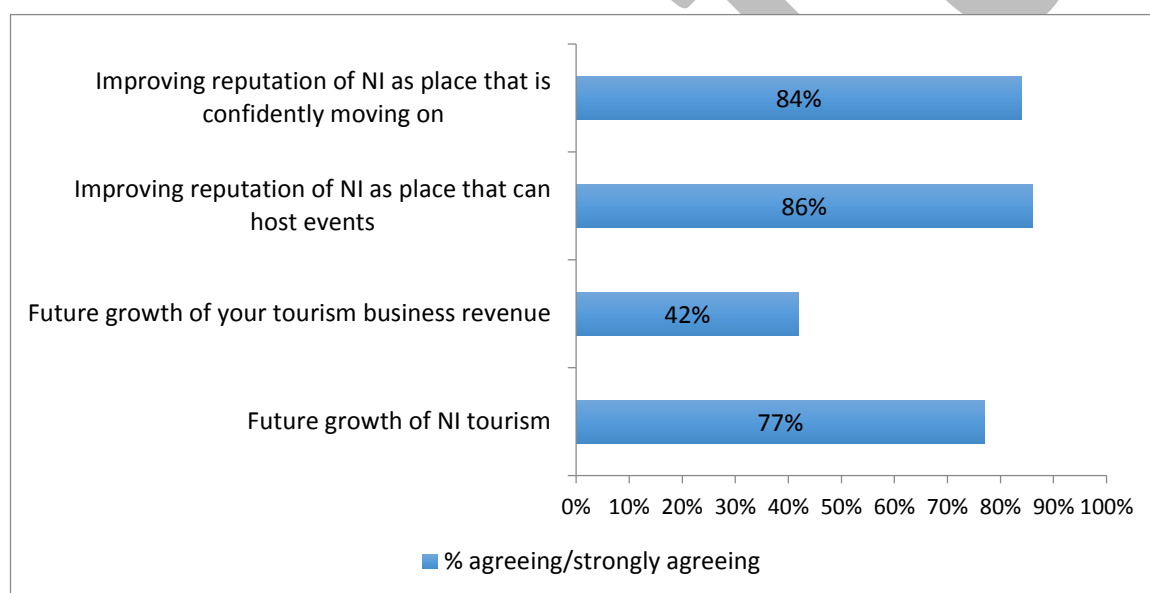
A similar survey of tourism businesses in Northern Ireland in September 2013 also gave positive views on the impact of the CoC 2013 not just in the city but in the rest of Northern Ireland. Almost 50% agreed that it had increased tourism revenues in other parts of Northern Ireland and 21% had experienced the benefit in their own business. Over three quarters of tourism businesses agreed that CoC 2013 will have a significant positive impact on the future growth of Northern Ireland tourism.

**Figure 4.8: Impact of CoC 2013 on tourism revenues in 2013**



(Source: NITB Tourism Industry Barometer Survey, Sept 2013)

**Figure 4.7: Long term impact of CoC**

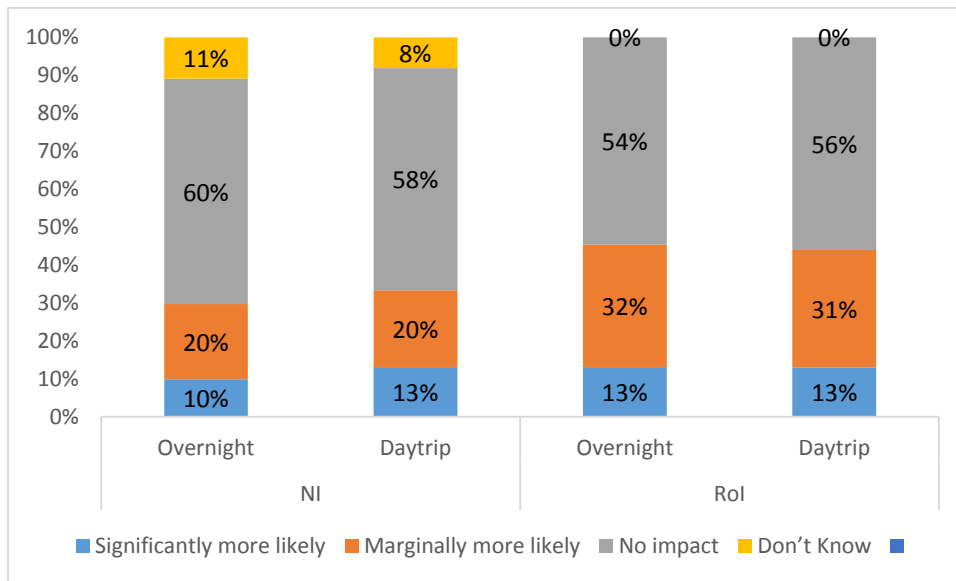


(Source: NITB Tourism Industry Barometer Survey, Sept 2013)

Finally, the Leisure Consumer Barometer Survey for December 2013 reported some very positive impacts of CoC 2013 on the likelihood of consumers in both Northern Ireland and the Republic of Ireland visiting Derry~Londonderry in 2014. More than 30% of Northern Ireland residents and more than 40% of residents of the Republic of Ireland are more likely to visit the city either for an overnight stay or a day trip.



**Figure 4.8: Impact of CoC 2013 on likelihood of visiting Derry~Londonderry in 2014**



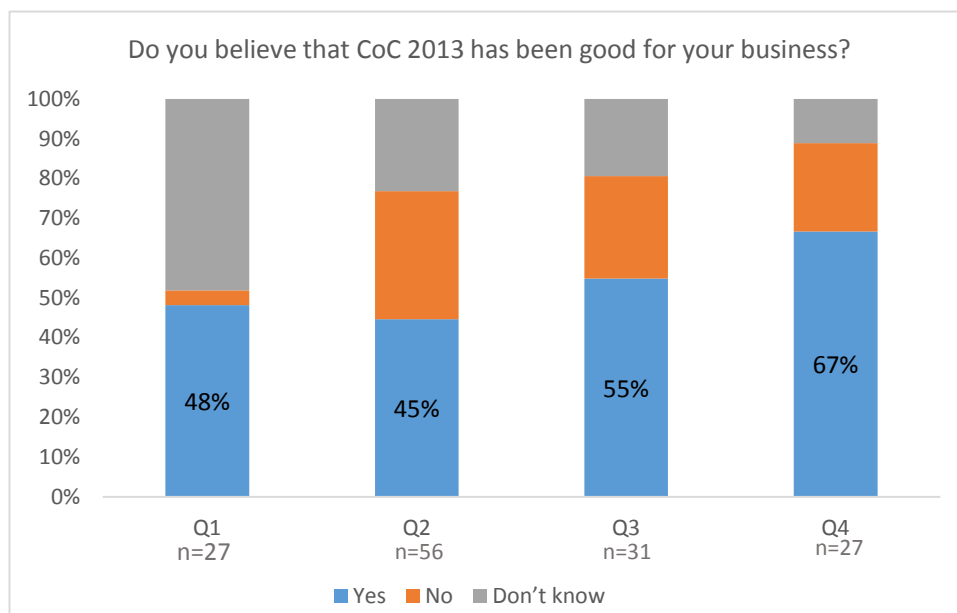
(Source: NITB Leisure Consumer Barometer Survey, December 2013)

### Local perceptions of impact of City of Culture 2013

The views of the city’s residents on the impact of the City of Culture are generally reported as very positive although the data to support this conclusion will only be available on completion of the Citi-scope survey in 2015.

However, Ilex has also worked with various partners to monitor the economic changes that have occurred within the City during and after the City of Culture year. This includes a number of City of Culture Business Surveys which involved input from the Londonderry Chamber of Commerce, Ilex, Visit Derry and laterally DCC and a small number of business tourism initiatives. The surveys asked local businesses their views on what impact the City of Culture 2013 programme was having in the short-term. Four quarterly surveys of businesses in the city were undertaken during the year and a fifth survey was undertaken in early 2014 to assess the overall impact of the year. While these surveys had relatively small sample sizes and must therefore be treated with some degree of caution, they still provide a useful indicator of the business view of the impacts. The quarterly surveys show that an increasing proportion of businesses felt the impact was positive.

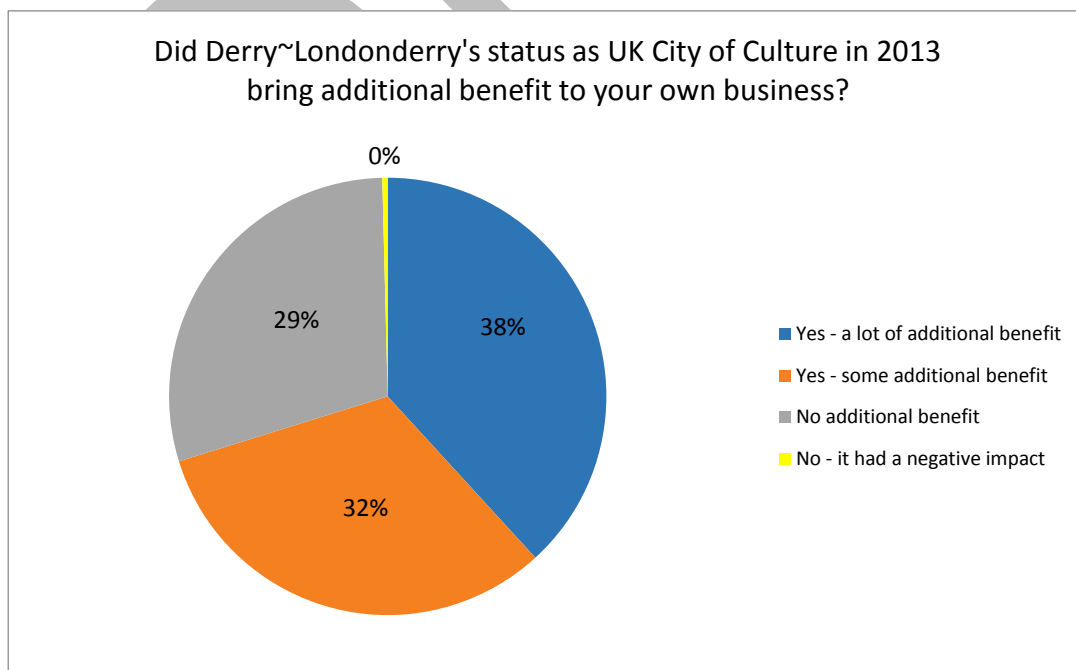
**Figure 4.9: Views of businesses on impact of CoC 2013**



(Source: City of Culture Quarterly Business Surveys, 2013)

In the overall survey in early 2014 around three quarters of the 35 businesses that were surveyed felt that Derry~ Londonderry's status as UK City of Culture in 2013 had a very positive effect on the City and region, while the remaining quarter felt it was positive. Over 70% of the businesses felt that there had been some or a lot of additional benefit to their business from CoC 2013.

**Figure 4.10: Views of business on impact of CoC 2013**



(Source: City of Culture Business Survey, 2014)

(Please note data may not sum to 100 due to rounding)

The main benefit quoted by businesses was increased turnover but increased profile and increased business confidence were also important.

Draft

## 5. Conclusions

This report has presented the monitoring data collected to date by Ilex on the impacts of the City of Culture 2013 (CoC 2013). The overall aim of the bid was to make a number of 'step changes' as part of the One Plan for the regeneration of the city that would transform the fortunes of the city and the wider region. This is reflected in the range of impacts covering cultural access and participation, the economy and tourism and changes to the image and perception of the city.

The key results from the monitoring data available to date can be summarised under three headings as follows:

### Cultural access & participation

- CoC 2013 delivered more than 400 events and it is estimated that these events generated up to 1 million attendances and participants;
- To date 122 post project evaluations have been received illustrating a wide range of benefits of the events and activities, including increased participation in the arts, improved perceptions of the city, enhanced community relations as well as positive economic impacts;
- The majority (over 60%) of audiences/participants for events were from the Derry City Council area with a further quarter from other parts of Northern Ireland and the remaining 13% from outside Northern Ireland, although the proportion of those visiting from outside Northern Ireland for the six major NITB sponsored events was double this at around 25%;
- Audiences were broadly representative of the age profile of the population with slightly above average representation of young people aged 16-24;
- 62% of those surveyed at events organised by the community engagement programme indicated that that it was the first local arts/cultural event they had attended and there were high levels of satisfaction in excess of 80% on average recorded for CoC 2013 events;
- Good equality of access was achieved - over 80% of residents of the Council area attended or participated in at least one event and 33% of those attending/participating were from the most disadvantaged wards of the city;
- There is strong qualitative evidence that CoC 2013 contributed positively to improving good relations in the city and strengthening community cohesion;
- Evidence from the PSNI suggests that the level of anti-social behaviour reduced by over 20% during the peak summer months of 2013.

### Economy & tourism

- While official statistics for visitor numbers to the city are not yet available, there were increases of between 14% and 85% to the main visitor attractions in the city during 2013 and the number of enquiries at the Tourist Information Centre rose by 17% in the year;

- There were an estimated 650,000 attendances at the six main NITB supported events in 2013 of which almost 380,000 were 'unique' spectators (i.e. the number of actual persons who may have attended on more than one occasion);
- The largest event was the Fleadh Cheoil na hEireann which attracted almost 400,000 attendances over a week, of which 163,000 were unique spectators;
- Proportions of visitors from outside Northern Ireland for these six major events ranged from 13% for the Walled City Tattoo to 40% for the Fleadh Cheoil na hEireann;
- Hotel occupancy was also significantly higher during 2013 than the previous year despite an increase in the rooms available – average room occupancy in the city's 10 hotels was 69% compared with 74% in Belfast (which is always higher than elsewhere in Northern Ireland) and 54% in the rest of Northern Ireland. During the months of May to August 2013 occupancy rates were in excess of 80%, higher than Belfast rates;
- NITB commissioned studies of the economic impact of the six major events show that after allowing for 'leakage' (expenditure by organisers on goods and services outside the area) only the Fleadh Cheoil na hEireann had a positive economic impact at Northern Ireland level, but 5 of the 6 events had a positive impact on the economy of the Derry City Council area as a result of expenditure by visitors from other parts of Northern Ireland as well as elsewhere;
- The six major events represent the largest element of the economic impact of CoC 2013 accounting for £27.4m of expenditure in Northern Ireland. When other events are included this is estimated to rise to an expenditure in Northern Ireland of between £30m and £35m.
- Approximately £150m of public and private sector investment is estimated to have been secured/levered into the area as a result of the CoC 2013 designation, of which about 77% was capital investment. This includes the Translink investment on the new railway line and the new Premier Inn hotel in the city;
- Other studies<sup>19</sup> have highlighted the difficulty in measuring the tangible impact on employment from programmes of this nature. This has also been the case in assessing the employment impact of CoC 2013. However, on the basis of available evidence it is estimated that 300 to 400 full time equivalent jobs were created during 2013 which will have led to further jobs created as a result of multiplier effects. The main economic impacts of the City of Culture are expected to be in the long run as a result of the change in perceptions of the city.

### Image & perceptions

- An SIB-commissioned media evaluation of CoC 2013 found over 12,300 items of media coverage generating almost 2 billion 'opportunities to see' i.e. potential viewers;

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<sup>19</sup> Liverpool, Glasgow, London

- The coverage was overwhelmingly positive with peaks in coverage coinciding with the major events and the Turner Prize exhibition and ceremony attracting the most mentions of any single event;
- Tourism Ireland also monitor media coverage and estimated that the 'equivalent advertising value' for coverage of CoC 2013 was €24.1m;
- There were 600,000 visits to the City of Culture website in 2013 peaking in June and August around the BBC One Big Weekend and the Fleadh Cheoil, and there were 34,000 visits to the Walled City page on the Discover NI website, up 45% on the previous year;
- Surveys of external perceptions of Derry~Londonderry showed strong agreement that CoC 2013 had improved Northern Ireland's reputation as a tourist destination and a place that can host events - over 50% of NI respondents and over 60% of ROI respondents agreed that it made them feel differently about Derry~Londonderry;
- A similar survey of tourism businesses in Northern Ireland also gave positive views on the impact of the CoC 2013 - almost 50% agreed that it had increased tourism revenues in other parts of Northern Ireland and 21% had experienced the benefit in their own business;
- A survey of consumers at the end of the year found that more than 30% of Northern Ireland residents and more than 40% of residents of the Republic of Ireland are more likely to visit the city either for an overnight stay or a day trip;
- Qualitative evidence suggests that CoC 2013 has had a particularly positive impact on local confidence and morale in the city – by the end of the year, two thirds of local business reported that the year had a positive impact on their business.

### Achievement of step changes

The 2009 bid to DCMS for UK CoC designation identified a number of 'step changes' that would be achieved through the delivery of the programme. These included changes in:

1. Equality/ Good Relations/Social Cohesion (SC1)
2. Sustainable Cultural Environment (SC2)
3. Creative and Connected Community (SC3)
4. A New Story/Reputation (SC4)
5. Economic Renaissance/Prosperity (SC5)

While it is still too early to draw firm conclusions on the achievement of these step changes, the evidence summarised above suggests that CoC 2013 has already gone some way towards their delivery. There is clear evidence of improvements in equality/good relations/social cohesion, developing a sustainable cultural environment and building a creative connected community but perhaps the most significant advances to date have been in the fourth and fifth step changes – a new story/reputation and economic renaissance/prosperity. The major improvements in external

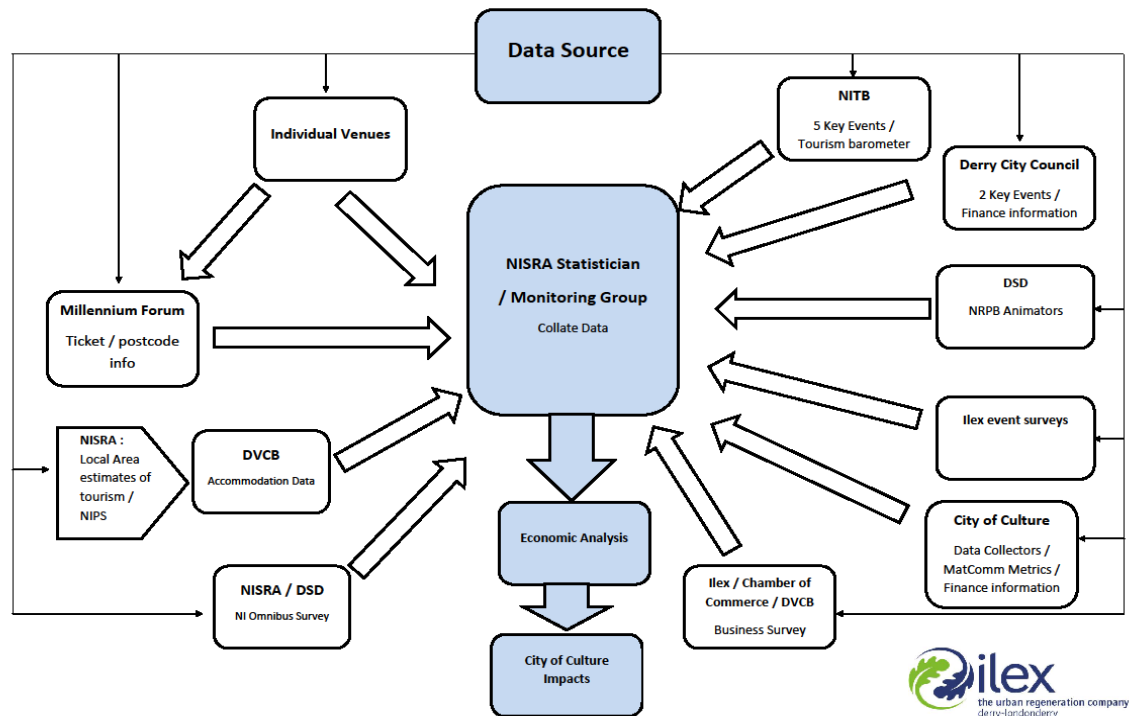
and internal perceptions of the city and its image provide the foundations for further economic growth and prosperity in the years ahead.

### Lessons for legacy

This report has presented a wide range of evidence of the positive impacts on the city from its City of Culture year that have the potential to have strong legacy effects going forward. The challenge over the next few years is to capitalise on this through the legacy planning which is already in place. Suggestions to complement that legacy plan include:

- It is important to continue to monitor the impacts of CoC 2013 as many of the impacts will occur in the medium to longer term;
- The post project evaluations are a valuable source of information about the impacts of individual events and projects, although they are of variable quality. Every effort should be made to follow up those that have not been submitted and a fuller analysis undertaken to understand what worked well and why;
- The next Citi-scope survey, which is due to take place soon, is an important element of the ongoing monitoring and will provide a good barometer of the changes in the community since the last survey in 2012;
- It would be useful to have an agreed model for measuring the economic impact of future events staged in the city that measures the impact on the local economy as well as the impact at Northern Ireland level;
- The formal evaluation of CoC 2013 should take account not just of the economic impacts, which in the short term are still relatively modest, but also of the broader impacts on participation in the arts, on the health and wellbeing of the population, on good relations and most importantly on the confidence and morale of businesses and the community of the city.
- Future events should review disability access as those persons with a disability were found to be underrepresented at survey events.

## Annex A: Monitoring Framework





## Annex B: List of Key Event Surveys

Event	Date	Responsibility
Sons & Daughters	20 <sup>th</sup> January	Culture Company
Ulster Elite Amateur Boxing Championships	21 <sup>st</sup> -25 <sup>th</sup> January	Culture Company
Humdinger	7 <sup>th</sup> -9 <sup>th</sup> March	Culture Company
Hofesh Shechter: Political Mother	8 <sup>th</sup> /9 <sup>th</sup> March	Ilex
Tea Dance	15 <sup>th</sup> March – 1 <sup>st</sup> May	Culture Company
St Patrick's Day Festival	14 <sup>th</sup> – 17 <sup>th</sup> March	Derry City Council
Music for the Big Screen – London Symphony Orchestra	18 <sup>th</sup> March	Ilex
Primal Scream	19 <sup>th</sup> March	Ilex
Royal Ballet & Ulster Orchestra	30 <sup>th</sup> March	Ilex
City of Derry Jazz & Big Band Festival	2 <sup>nd</sup> -6 <sup>th</sup> May	Derry City Council
Grand Vintage Ball	4 <sup>th</sup> May	Culture Company
BBC One Big Weekend	24 <sup>th</sup> -26 <sup>th</sup> May	Ilex
Carnivale of Colours	1 <sup>st</sup> June	Ilex
The Return of Colmcille	7 <sup>th</sup> and 8 <sup>th</sup> June	NITB
Music City	21 <sup>st</sup> June	Ilex
Buena Vista	21 <sup>st</sup> June	Ilex
Status Quo	22 <sup>nd</sup> June	Ilex
Firmus Energy City of Culture Triathlon	23 <sup>rd</sup> June	Ilex
Elvis Costello	27 <sup>th</sup> June	Ilex
Celtronic	29 <sup>th</sup> June	Ilex
Walled City Music Festival	19 <sup>th</sup> -28 <sup>th</sup> July	Ilex
Fleadh Cheoil na hEireann	11 <sup>th</sup> to 18 <sup>th</sup> August	NITB
Foyle Pride	24 <sup>th</sup> August	Ilex
The Walled City Tattoo	28 <sup>th</sup> to 31 <sup>st</sup> August	NITB
CultureTECH	9 <sup>th</sup> Sept – 15 <sup>th</sup> Sept	Ilex

Youth Peace Summit	21 <sup>st</sup> September	Ilex
Pits and Perverts	4 <sup>th</sup> October	Ilex
Gymfusion	5 <sup>th</sup> October	Ilex
Turner Prize	23 <sup>rd</sup> October to 5 <sup>th</sup> January 2014	NITB & Ilex
Banks of the Foyle Halloween Carnival	29 <sup>th</sup> October to 2 <sup>nd</sup> November	Derry City Council
Lumiere	28 <sup>th</sup> November to 1 <sup>st</sup> December	NITB

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## Annex C: List of statistical sources

- Northern Ireland Omnibus Survey May to July 2013
- Northern Ireland Tourist Board Passenger Survey 2013
- Millennium Forum Ticket Information
- Ebrington/Peace Bridge Survey 2012 and 2013
- Citi-Scope 2012 Citizen Survey
- The Venue Ticket Information
- City of Culture Business Surveys
- Derry City Council Survey Information – 2 Surveys
  1. City of Derry Jazz and Big Band Festival (2<sup>nd</sup> to 6<sup>th</sup> May 2013)
  2. Banks of the Foyle Halloween Carnival (29<sup>th</sup> October to 2<sup>nd</sup> November)
- Northern Ireland Tourist Board Survey Information – 5 Surveys
  1. The Return of Colmcille (7<sup>th</sup> and 8<sup>th</sup> June)
  2. Fleadh Cheoil na hEireann (11<sup>th</sup> to 18<sup>th</sup> August)
  3. The Walled City Tattoo (28<sup>th</sup> to 31<sup>st</sup> August)
  4. The Turner Prize 2013 (23<sup>rd</sup> October to 5<sup>th</sup> January 2014)
  5. Lumiere (28<sup>th</sup> November to 1<sup>st</sup> December)
- Individual Venues Ticket Information (some venues have provided information)
- DVCB Hotel Occupancy Information – up to and including June 2014
- ILEX City of Culture 2013 Survey Data
- City of Derry Airport Passenger numbers 2013 – <http://www.derrycity.gov.uk/News/City-of-Derry-Airport-report-on-performance-and-in>

## Annex D Case Studies

### Introduction

A number of case studies have been undertaken to illustrate some of the impacts of the City of Culture 2013. The case studies are as follows:

- The Business Tourism Industry
- Londonderry Bands Forum
- Derry-Londonderry – UK Worldhost City 2014
- Business Opportunities Programme

#### Business Tourism Industry of Derry~Londonderry City of Culture

*'I have been attending a BVEP meeting over the past two days and the Derry part of our visit to Northern Ireland has surpassed all expectations... What is on offer here is truly remarkable and I can only emphasise once again that "Derry is open for business".'*

Michael Foreman, Chairman of the Association of British Professional Conference Organisers.

### Introduction

'Business Tourism' or the MICE industry (Meetings, Incentives, Conferences & Events) has been identified by the Northern Ireland Tourist Board (NITB) as one of four product portfolios instrumental in delivering a competitive advantage for Northern Ireland in the global tourism sector.

During 2013, 332,000 trips were taken to Northern Ireland for business purposes (15% of external trips), an increase of 6% on 2012. Average spend per trip by business visitors was £393 in 2013.

The sector is an important contributor to tourism and the wider economy for a number of reasons including:

- Approximately 30% of business tourism delegates are likely to return to the host destination as a leisure tourism visitor
- Average spend per trip by business visitors is typically higher than non-business visitors
- It increases the networking capacity/exposure of the host destination
- It can contribute to developing trade and inward investment through showcasing of the host destination's products and services
- Many of the investments in a host destination's infrastructure (accommodation, transport, communications etc) can provide benefits to be enjoyed by the leisure tourist and indigenous population
- The benefits of business tourism can be felt year round

Evidence would suggest that investment in business tourism facilities have led to the regeneration of urban and inner city areas in cities including Belfast, Birmingham, Cardiff, Glasgow and Manchester.

### Impact on the Business Tourism Sector during Derry~Londonderry City of Culture 2013

The UK City of Culture placed a national and international focus on the City leading up to and during 2013. This heightened positive PR and profile provided an excellent opportunity for Visit Derry and other organisations to bid for national and international conferences as well as developing new

conferences as part of the 2013 City of Culture programme. The title featured strongly in conference bids offering conference organisers the unique opportunity to use the City of Culture brand to:

- Increase conference profile and delegate attendance
- Increase sponsorship through City of Culture brand association
- Enhance conference programmes by integrating City of Culture events
- Align conference themes with City of Culture brand

Visit Derry also established their ‘Ambassador’ programme to capitalise on this opportunity during 2013. The majority of conferences were therefore secured as a result of working in partnership with local representatives to promote the city as a conference destination through their extensive network or industry contacts, colleagues, clients and suppliers. This largely focused on ‘Ambassadors’ from the academic sector at the University of Ulster Magee Campus as well as the medical sector at the Western Trust’s Altnagelvin Hospital. This provided an opportunity for these sectors to showcase their work and research during the City of Culture year and the securing of a series of high profile medical and academic conferences including the *Media, Communications and Cultural Studies Association*, the *National Association of Medical Education Management* and the *Irish Thoracic Society*.

There were 43 conferences secured during 2013 attracting over 8,000 delegates to the city and generating over £5m to the local economy (evidenced by DVCB estimates). This represents an increase of approximately 30% in conferences bookings compared to 2012 and also an increase in the bid success ratio. Visit Britain (VB) estimate that a national association conference is worth an estimated £516 per delegate per day (VB Delegate Expenditure Model).

Objective	Target 13/14	Progress Update
<b>Increase in no. of Ambassadors</b>	120	221
<b>Increase in no. of conferences</b>	22	43
<b>Increase in revenue generated</b>	£3.3m	£5m
<b>Increase in no. of delegates</b>	4,400	8,050

High profile conferences which took place during the year included the:

- European Business & Innovation Centre Network Annual Congress with 550 delegates staying 1,650 nights
- World GAA Congress with 400 delegates staying 800 nights
- Rotary Club International Global Peace Conference with 300 delegates staying 700 nights
- European Walled Towns AGM with 150 delegates staying 600 nights

There was a strong international context to the conferences secured with three in five involving conference organisers from outside Northern Ireland.

There are currently 221 individuals taking part of in the Ambassadors programme, almost twice the number originally targeted. This programme was shortlisted as a finalist in the Derry~Londonderry Business Awards for ‘Best Tourism Initiative’. The *‘European Business & Innovation Centre Network Annual Congress’* was nominated for ‘Best large scale congress’ at the 2014 UK Conference Awards. This involved significant input from two local Ambassadors from Noribic.

### **The Business Tourism Legacy in Derry~Londonderry**

The city is keen to ensure that the legacy presented by the City of Culture will be used to full effect to exploit the potential of the business tourism sector. The 15% increase in accommodation capacity, the major investment and development of the city's cultural, historical and unique spaces/venues developed as part of the City of Culture as well as future projects such as the planned development of the North West Regional Sports Campus will all make a significant contribution to this aim.

There have already been a series of bid opportunities for future conferences in the city which have aimed to capitalise on the City of Culture year. This has included the *British Association of Cardiovascular Prevention & Rehabilitation* and the *International Association of Curators of Contemporary Art 2014*. The Curators conference is an excellent example of how the city has built on the City of Culture year in that it has involved two local Ambassadors who were key curators for the Turner Prize Exhibition and extends the existing Academic and Medical Ambassadors to include 'Cultural Ambassadors' as well. Local Ambassador Professor Siobhan O'Neill from the University of Ulster Magee Campus secured the *Irish Association of Suicidology* conference during 2013 and its success has led to additional bid opportunities for the *International Association for Suicide Prevention* and *European Health Psychology Society* annual conferences.

There have been significant developments in the city and surrounding area in sectors including medicine and science. This includes the £11.5m NI Centre for Stratified Medicine, Ireland's first functional Brain Mapping facility (£3.5m) at the University of Ulster Magee Campus, a £12m Science Park at the Fort George Site. Altnagelvin Hospital's new £50m Radiotherapy Unit is due to open in 2016. These all have the potential to bring new business tourism and Derry City Council's theming of 2015 as the year of Science and Creativity also has the potential to attract new association and business delegates.

Visit Derry have also continued to make a significant commitment to the development of the business accommodation sector. It aims to build on the Ambassador network of contacts placing increased focus on industry knowledge and areas of sector specialism to strengthen the conference bidding process. A new 'Business Tourism Taskforce' has been launched by Visit Derry to drive the growth of the Conference and Meetings sector and generate £4.2m to the city over the next two years. The Taskforce is comprised of key industry stakeholders with the aim of creating leads, generating bids and winning conferences as well as building the Ambassador network. Visit Derry also aim to create a business model whereby keynote speakers are connected with local stakeholders to explore investment opportunities and fully maximise the potential for the city in hosting conferences.

Next steps in the development of the Business Tourism Industry in Derry~Londonderry also include:

- To undertake a series of MICE industry marketing campaigns
- To create a strong branded portfolio for the city as a leading conference destination
- To identify key industry agents and host familiarisation visits to Derry~Londonderry
- To ensure the continued use of the Conference accommodation bureau system (Passkey – set up by NITB/DCC during 2013)

## Londonderry Bands Forum

### *“Divided by history, united by music”*

(inscription on presentation made by the William King Memorial Flute Band to St Joseph’s Brass Band, Strabane following joint participation in Walled City Tattoo)

#### **Background**

The Londonderry Bands Forum was established in October 2010 and is one of the projects of St Columb's Park House, a cross community organisation based in Derry~Londonderry. It is funded primarily by IFI through its Peace Impact Programme delivered by CFNI. The Forum currently consists of 14 bands, representing around 700-800 members plus their supporters, made up as follows:

Pipe Bands	2
Brass Bands	1
Accordion Bands	1
Flute Bands	10 (including 2 silver, 2 Melody and 6 blood & thunder)

The aims of this unique project, the first of its kind in Northern Ireland, are as follows:

- **Guidance:** The Project Coordinator is responsible for hosting monthly meetings of the Forum in order to keep the members up to date with relevant issues, and opportunities about available funding, musical events and any other items of interest. The monthly meetings since the appointment of the Coordinator have shown a rise in attendance and a more focused agenda has meant that the overall participation level has increased as more relevant topics are discussed. Four new bands have approached the Forum and been admitted.
- **Development:** Accredited training programmes are being developed with the aim of helping the current band leadership in the general management of their bands, and a programme is under development to achieve the same aims with young people identified as future leaders of these organisations. Work is ongoing with each band to focus on specific areas of need and guidance for development in areas including constitution, statutory policies, management and finance.
- **Education:** This is one of the most important areas of the overall project and the Forum is working on ideas to take the basic ideals and culture of the “Banding Tradition” out to schools, youth clubs and adult groups in order to engage in debate about misconceptions and preconceptions about what the Band scene in Londonderry is all about and the direction in which it is moving. A pamphlet has been produced in partnership with the Good Relations Branch of DCC encouraging debate and understanding about the history and purpose of the Band culture. The Forum is also teaching young musicians of the future from both of the main religious groupings. The work currently being done with these young musicians will provide an opening never explored before in the city at this grassroots level.
- **Community Impact:** In association with local community groups the Forum is encouraging bands in some of the more marginalised parts of the city to take an active approach to issues and developments in their own areas. The bands often represent the only form of youth work taking place in some loyalist neighbourhoods and as they meet at least once a week for 52 weeks in the year they represent an opportunity to work with young people in these areas and to offer them training not just in musicianship but in other skills. Links with the local communities are essential for the future development of the bands. Their participation with social and community based organisations where they operate from brings understanding and enhances relationships within these community areas.
- **Networking/ Understanding:** the Forum held a series of networking events with statutory bodies, PSNI, Council Event Planners, City Centre Initiative etc. and organisations representing parading/marching including the Orange Order, Apprentice Boys, Ancient

Order of Hibernians and the Royal British Legion. The purpose of these meetings was to bring the Bands Forum members into contact with the bodies to facilitate understanding of legal obligations, Council bye laws in regard to event planning and the safe and orderly way forward with parade issues. In August 2014 the Forum launched the 'Maiden City Accord' a Code of Conduct and a set of roles and responsibilities for those involved in parades in the City. The Forum has also had meetings with the nationalist James Connolly Memorial Flute Band in Londonderry (an AOH sponsored band) and the subsequent engagement in workshops with them has given the opportunity for Forum members to help them develop as a musical group by creating tuition programmes in Fluting and Drumming.

- **Positivity:** the Forum encourages bands to promote and publicise the many positive things they do for all members of the community. It helps members to forge links with the various groups and organisations in order to expand their horizons and spread the band culture and ideals by dialogue and education.
- **Building Relations:** The programme is actively building on the tentative steps taken over the past few years in encouraging the member bands to look beyond their own communities and engage in areas never before explored by Marching Bands. For example, the Forum is currently working with "An Culturlan" in Londonderry to create bursaries for bandsmen and women to take Irish Language courses as part of our ongoing strategy to move forward with all communities.

### **Involvement with City of Culture**

Although it was not directly funded by City of Culture, the Forum has been closely involved with a number of CoC 2013 events and activities and the member bands have diversified in ways not normally associated with the "Marching Band" stereotype.

**1. "Beyond the March"** A "Moving on Music" project exploring the versatility of 3 of the Forum flute bands.

This took three "Blood and Thunder" type bands from the Forum and teamed them up with two composers Brian Irvine and Sid Peacock to explore what they could achieve with music including flutes, drums, saxophones, bass guitars, keyboards etc. The live performances took place during "Music City" day in the Playhouse Theatre in Londonderry, a venue not usually associated with participation by members of the Protestant Unionist Loyalist (PUL) tradition. The feedback from audience and theatre management was very positive.

**2. "The Pride"** is a play telling the story of the problems and thoughts of people running a Flute Band.

This play was written by local playwright Johnathon Burgess and was performed by professional actors and bandsmen from a flute band from Newbuildings. It was re run during the All-Ireland Fleadh and was performed in Ballybofey, Co Donegal and "An Culturlann" the Irish culture centre in Londonderry. The message it gave out was about the problems associated with running and organising a band with emphasis on the parading and acceptance issues that are relevant with PUL bands. The success of "The Pride" play and the potent and honest portrayal of banding issues will again be seen by new audiences as the play has been invited to Sligo for this year's All Ireland Fleadh.

**3. "The Relief of Derry Symphony"** Three local bands representing the Forum's top flute bands collaborated with Irish Traditional players and professional musicians to perform this orchestral piece.

This event was part of the Apprentice Boys "Maiden City Festival" and involved two concert flute bands Churchill and Hamilton plus melody flute band William King Memorial performed with Irish traditional flute player Marcas O Murchu and singer Doreen Curran. They were joined by



professional flute group Festive Flutes led by Mel Orris who conducted two performances of Shaun Davey's "Relief of Derry Symphony". The venue for this event was the magnificent St Columbs Cathedral which was operating during the actual siege - the significance of this was not lost on the performers or audience.

**4. "The All-Ireland Fleadh"** After much debate the Forum was represented by four bands at the "Fleadh" who were very well received by the vast crowds from all over Ireland. The Forum also held "Master Classes" in marching band music. This was by far the most debated topic of the year and was talked about by individual bands and the Forum as a collective. The bands that represented the Forum made no changes to their repertoire and gave performances exactly as they would during their normal PUL events. This was appreciated by the organisers and audiences alike. Participation has led to a more active role for the Bands Forum and a major voice in the musical direction that festivals and events in the city will take in the future. The Forum was represented on the steering committee of "The Pan Celtic Festival" for April 2014 and "The Music Legacy" initiatives that follows on from CoC 2013.

**5. "The Walled City Tattoo"** Forum member band William King Memorial Flute Band joined with St. Josephs Brass Band, Pipe Bands and individual musicians of various nationalities and religions to form a massed band at Tattoo, this has led on to further cross cultural events. The Walled City Tattoo saw the William King Memorial Flute Band from the "Fountain" area of Londonderry, as well as performing to great acclaim individually, team up with St Joseph's Brass Band from Strabane to form a massed cross community band to perform together in an acclaimed role. The St Joseph's band who are not renowned for their marching prowess were trained and led by one of the senior Drum Majors in the Londonderry Bands Forum. The inscription on a presentation made by the William King to St Joseph's read simply "Divided by History, United by Music".

**6. "Coming Home for Christmas"** Another play by a local playwright Sam Starrett, about a group of young men from Drumahoe near Londonderry who went to the "Great War." Bands Forum members East Bank Protestant Boys produced this play and performed in it with professional actors under the direction of Mr Jonathan Burgess from "Blue Eagle Productions"

### **Impact of City of Culture**

Up until the City of Culture there had been Good Relations work going on in the city but it did not have a great profile and faced a number of barriers. The CoC provided the opportunity to push the barriers and lift GR work to a new level. Together with the Peace Bridge it has begun to transform Protestant attitudes to the City. There has been significant Protestant alienation and frustration which meant that young people increasingly looked away from the city for education, work and socialising. The Peace Bridge and the City of Culture helped to change this.

The Londonderry Bands Forum's engagement with CoC 2013 had a positive impact on good relations in the city in a number of ways:

- It strengthened the valuable work that the Forum was already doing in PUL communities in the city and gave it a status and profile that it might not otherwise have had;
- It promoted better understanding of the band and parading culture throughout the city;
- It allowed the Forum to become involved in legacy projects in the city and to become an important stakeholder in the music culture and the future provision of musical events in the city; and
- It led to initiatives taking place in the city which would previously not have been possible, such as the participation of some bands in the Fleadh and cross community provision of music lessons

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#### Derry~Londonderry - UK WorldHost City 2014

WorldHost is an internationally recognized customer services training programme that has been used to train over one million people worldwide including tens of thousands of volunteers and staff at the London 2012 Olympic Games and Paralympics. The WorldHost programme is being rolled out in Northern Ireland by the NITB in partnership with People 1<sup>st</sup> with funding support from the Department of Employment and Learning. The aim is to help businesses in the tourism and visitor economy sector gain a competitive edge and build Northern Ireland's reputation as a first-class visitor destination. Training is offered to private sector SMEs within the tourism, hospitality, travel, passenger transport and retail sectors. To date over 13,000 staff in Northern Ireland have been trained to WorldHost standards while over 500 Northern Ireland businesses have been awarded WorldHost Recognised Business status.

In total almost 4,000 people from Derry~Londonderry have taken part in WorldHost training representing 30 per cent of the total across Northern Ireland. They include hotel staff, shop workers and thousands of other employees who provide public services in Derry~Londonderry including the PSNI. This also includes 528 volunteers, 13 per cent of the total. In addition 122 businesses received a Business Recognition Award, 24 per cent of the total for Northern Ireland and second highest after Belfast. This is awarded to businesses that have trained 50% or more of their front line staff and signed a commitment to delivering excellent customer service.

Derry~Londonderry was declared as the first ever city in the UK to achieve WorldHost Recognised Destination status in March 2014 beating other WorldHost committed cities across the UK including Liverpool, Aberdeen, Worcester and Salisbury. This is an internationally recognised award to areas that have made a commitment to excellence in customer service and hospitality skills through WorldHost training programmes. It is awarded to towns and cities where 25% of businesses have reached WorldHost Recognised Business status.

Roisin McKee, director of Northern Ireland for People 1<sup>st</sup>, commented that:

*'Customer service is a major skills need for tourism businesses. Our research shows that 92% of employers highlight customer service as the most important skills need for their business in the next five years. That is why WorldHost forms a critical part of destination tourism and skills plan and why we are working closely with NITB and DEL to provide customer service training to businesses across Northern Ireland. The success of WorldHost in Derry~Londonderry stems from a unique collaborative partnership at a local level across industry and key partners such as Ilex and the council who are committed to helping the city develop as a world-class tourist destination.'*

*'The achievement of first UK WorldHost recognized city is testament to the extraordinary commitment that businesses have shown to investing in their welcome. This is a wonderful legacy of the Derry~Londonderry's year as UK City of Culture and I have no doubt that it will have a positive impact on tourism in the city in the years ahead.'*

Airporter Director Jennifer McKeever became a World Host Trainer in January 2012 and by February 2012 had trained 18 Airporter staff members in Principles of Customer Service including the Ambassador program. In October 2012 Airporter was awarded “World Host Recognized Business” status and in early 2013 also completed the “Services Across Cultures” module, to hone in on the skills required to serve International visitors. Jennifer McKeever commented that ‘My staff thoroughly enjoyed the training ..... It helped to prepare them for the 2013 City of Culture year and also to understand the role and responsibility that each of them shared in delivering an outstanding year of events. Our passenger numbers this year have increased by nearly 5 percent and turnover has increased by nearly 10% - satisfied customers are very good for business!’

City Cabs is based in Derry~Londonderry and has a team of over 200 staff including office based dispatchers and self-employed drivers. City Cabs has been presented with a Business Recognition Award. The majority of staff at City Cabs have now undertaken World Host training and the company currently exploring the Level 3 Award also. As well as increasing staff confidence in dealing with customers, and helping to develop a benchmark for customer service across the organisation, the company believes it is clear that there have been real financial benefits that would not have been possible without the training. Commenting on WorldHost, the company highlighted that the business ‘has been growing year on year. The training gave us a structure and a focus to deliver a higher standard of customer service, which the public now recognise us for, and demand that we provide’.

### Business Opportunities Programme

The Business Opportunities Programme (BOP) was developed to provide a 'One Stop Shop' for businesses to get involved and benefit from City of Culture opportunities. The main aims of the Programme were to:

- Improve the capability of the SME sector to respond to the City of Culture opportunities and ultimately large scale events and initiatives
- Increase the level of business start up by maximising the opportunities presented by City of Culture
- Ensure the success and sustainability of the opportunities presented by the City of Culture and other subsequent major events
- Maximise the trade opportunities for the local SME sector
- Improve the capability of the SME sector in relation to public sector and big business procurement

A series of specialist training, mentoring and business development initiatives were developed to help businesses build capability and take full advantage of City of Culture 2013. The Programme, valued at £940k, has been part funded by InvestNI and the ERDF under the European Sustainable Competitiveness Programme for Northern Ireland. It will run until March 2015.

The BOP has involved a diverse range of activities. Core elements, along with key achievements to date, have included:

#### Business Opportunities Programme (BOP) - Achievements to Date

BOP Elements	Key Achievements
One Stop Shop	<ul style="list-style-type: none"> <li>• Over 2,000 attendees at BOP events</li> <li>• Oppshop Portal – 471 email subscribers, 480 Twitter &amp; 40 LinkedIn members</li> <li>• 325 business mentor relationships complete/in progress</li> <li>• Signposting to other organizations including Enterprise NW (24), DEL (20) and INI Voucher Scheme (2)</li> </ul>
Get Started for 2013	<ul style="list-style-type: none"> <li>• 4 Awareness sessions with 359 attendees</li> <li>• 4 specialist training sessions with 56 attendees</li> </ul>
The City of Culture Business Engagement & Promotion	<ul style="list-style-type: none"> <li>• Enterprise Week 2013 &amp; 2014 with 990 unique attendees, 56 events</li> <li>• Prepare to trade outdoors with 100 attendees</li> <li>• A number of information sessions e.g One Big weekend, Lumiere, Fleadh etc</li> <li>• Business Club events 2013 &amp; 2014 including social media and facebook for business</li> </ul>
2013 Mentor Bank	<ul style="list-style-type: none"> <li>• 325 business mentor relationships complete/in progress</li> <li>• 55 mentors recruited</li> <li>• 12 businesses secured new business (as at Dec 2013)</li> </ul>
'Business to Business' Procurement Support	<ul style="list-style-type: none"> <li>• 991 Businesses accessing portal</li> <li>• Procurement &amp; Marketing and Meet the Buyer events</li> </ul>
Specialist Thematic/Sector Support Programmes	<ul style="list-style-type: none"> <li>• Events including accommodation workshops (120 attendees), Wayne Hemmingway re: Clipper &amp; major events (100 attendees), Visual Merchandising</li> </ul>

	<p>Programme (81 attendees)</p> <ul style="list-style-type: none"> <li>• Guides including LegenDerry Food Guide and Craft in the City Guide</li> </ul>
Clipper Trade Programme	<ul style="list-style-type: none"> <li>• Trade visit to the Netherlands linked to the Clipper Race</li> </ul>
Access to Trading & Test Trading Opportunities	<ul style="list-style-type: none"> <li>• Market Trading Programme which involved 22 participants</li> <li>• This included training sessions, best practice visit to St George's market and a number of test trade opportunities at the DCC Halloween markets, Guildhall Craft Fair event and Christmas markets</li> <li>• 50 trading opportunities facilitated including the Fleadh Cheoil (36)</li> </ul>
New Business Creation	<ul style="list-style-type: none"> <li>• See details below</li> </ul>
New Products/Services Developed	<ul style="list-style-type: none"> <li>• 11 new products/services developed to date</li> </ul>
Business Case Studies	<ul style="list-style-type: none"> <li>• 11 business case studies</li> </ul>
Press releases	<ul style="list-style-type: none"> <li>• 15 press releases including Business Club 2013 and the Food Guide Launch</li> </ul>

### **'Get Started for 2013'**

This element of the BOP supported the development of new business ideas linked to City of Culture 2013. It was targeted largely at individuals, creative producers, practitioners, artists, cultural organisations, SME's, community groups and social enterprises in the private and social economy sector in the Derry City Council who wanted to take the first steps towards 1) exploring an early stage business idea 2) developing and starting a business 3) commercialising a product or service to enable them to start up and grow their business in the future. Individuals were offered training, one to one mentoring, workshops and networking opportunities.

'Get Started for 2013' delivered 11 new business starts and 12 full-time equivalent jobs. The businesses started include sole traders, one partnership and a social enterprise. Ten individuals have progressed to the Regional Start programme and three to InvestNI's Social Entrepreneurship Programme.

### **'New Business Creation'**

Under the 'New Business Creation' element of the programme, the aim was to assist 11 businesses start up creating 100 jobs in total. In fact, to date 56 businesses have been assisted under this element of the programme. Together they cover a wide range of sectors including Arts/Crafts (16%), Health (13%) along with Food (11%), Retail (11%) and the Services sector (11%). An estimated 30 jobs in full-time equivalent terms have been directly attributed by businesses to Derry-Londonderry's role as UK City of Culture.