



The
IMPACT
of the **Edinburgh Festivals**

Updated research on their cultural,
social and economic impact

June 2026

Front cover photo: Edinburgh Science Festival
This page: Edinburgh's Hogmanay. Photo by Jacinta Oaten



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Foreword

The Edinburgh Festivals have long stood as one of the world's most remarkable demonstrations of the power of arts and culture.

Every year, Edinburgh becomes a meeting place for creativity, curiosity and connection, welcoming artists and audiences from across Scotland and around the globe for a mesmerising array of artistic experiences. Yet the significance of the Festivals extends far beyond these cultural events, performances, and exhibitions to represent something much deeper. Through the Festivals, we get to witness first-hand how culture enriches communities, shapes identities, strengthens economies and enhances our collective wellbeing. The findings presented in this report offer compelling evidence of that contribution.

The evidence is now clear that arts and cultural participation are not optional extras or luxuries in our daily lives, but instead fundamental pillars of individual health and wellbeing. In my most recent book – *Art Cure: The Science of How the Arts Transform Our Health* – I summarise decades of research into the arts and thousands of studies illustrating the remarkable contribution that the arts and creativity can make to our health and wellbeing. Arts and cultural engagement support mental health, foster social connection, reduce loneliness, strengthen identities, and help people find meaning and purpose in their lives. Through impacting our minds, brains, bodies and behaviours, the arts influence how we feel, how we relate to one another,

and how we experience the world around us. In short, they enable us to flourish.

The benefits of arts and culture also extend beyond individuals to communities. Shared cultural experiences create opportunities for dialogue, build understanding and challenge ideas. They bring people together across generations, backgrounds and perspectives, helping to build trust and social cohesion. At a time when many communities are grappling with social fragmentation and unrest, cultural participation offers powerful opportunities to strengthen civic life and nurture a sense of common purpose.

The evidence presented in this report recognises the Edinburgh Festivals as cultural beacons. They achieve the paradoxical. The Festivals are inherently place-based – woven into the social fabric of Edinburgh as a city – yet deeply connected nationally and internationally. They draw artists and audiences who are both local and global. They act as a platform for world-leading artists and a pipeline for future talent. Several successes stand out in this new report. One is the impressive and accelerating reach the Festivals have across communities and schools; a reach that is transcending and breaking down barriers to access. A second success is the tangible benefits of the Festivals for the cultural economy, through providing substantial investment to artists and companies in Scotland, and for cultural tourism, through drawing visitors to Edinburgh who engage with the plethora of leisure and hospitality opportunities the city has to offer.

“ The Edinburgh Festivals show what is possible when culture is placed at the heart of civic life. ”

A third success is the clear articulation of the deep-seated benefits for soft power that the Edinburgh Festivals offer to Scotland. Collectively, the report highlights why and how the Edinburgh Festivals are such a unique and vital cultural asset.

As the Edinburgh Festivals approach their eightieth anniversary, this report is a stark reminder of why they continue to matter so profoundly, culturally, socially, economically, and politically.

The Edinburgh Festivals show what is possible when culture is placed at the heart of civic life, and this report provides a powerful case for the importance of sustaining and investing in their future for generations to come.

**Professor Daisy Fancourt,
University College London**

**Director, WHO Collaborating Centre
on Arts and Health**

UNESCO Chair in Arts & Global Health

Executive Summary

In the latest of a long line of internationally acclaimed impact studies, the Edinburgh Festivals are now publishing their most recent research across a series of cultural, social and economic indicators – which shows that at a fundamental level the Festivals make life better... for residents, artists, visitors, and businesses.

The research identifies the Edinburgh Festivals as a unique civic asset that enhances wellbeing through creative and community engagement, an unrivalled international springboard for Scottish artists and companies, and a major attraction for those choosing to live, work, visit and invest in Edinburgh – while also defining Scotland's cultural identity on the global stage.

The headline findings in this publication – which follow on from the recently published study outlining their environmental impact and their work in reducing that – show the Edinburgh Festivals as:

- **cultural adventurers**, with 90% of audiences acclaiming the Festivals as unique places of cultural discovery
- **civic drivers**, that enhance community well-being with 79% of local audiences stating that the Festivals make Edinburgh a special place to live
- **national investors**, spending more than £10m annually with event production companies and creative talent based in Scotland
- **economic powerhouses**, calculated to have a gross economic impact of £4.26 billion over the next five years in Scotland.

The huge cultural, social, and economic success of the Edinburgh Festivals, as identified in this latest research, provides an opportunity to showcase a 21st century nation. The research affirms that while the individual festivals are powerful brands in their respective fields, collectively they are both a unique national asset and a global phenomenon. They are an integral part of the cultural and social fabric of the country, and a fundamental part of the appeal that will drive Scotland forward.

In essence, the Festivals are seen to represent Scotland at its most confident, its most open and its most creative. They are distinctively Scottish and fiercely international and are committed to capitalising their enormous global value for the benefit of the people of Scotland.

We are facing challenging times which call for boldness, direction and vision – and the Edinburgh Festivals, through their pioneering collaborative work, their focused strategic thinking and their hugely praised programmes, have these qualities in abundance. They have a powerful role to play in increasing the creative capacity, economic strength and international reputation of Scotland.

Ahead of the 80th anniversary of the birth of our world leading festival city in 2027, now is the time to champion and invest in the Festivals' success, their ambitions, transforming work, dynamic enterprise and strong leadership – in the knowledge that such investment will not only pay dividends in Scotland's present but also ensure substantial legacies for our collective futures.

Festivals facts at a glance



79%

of audiences say that the Festivals make Edinburgh a special place to live/visit

WELCOME

89%

of audiences say that the Festivals create a welcoming environment in Edinburgh



90%

see the Festivals as unique places of cultural discovery



489%

increase in number of community groups engaged



39%

increase in number of schools engaged



245%

increase in Festivals partnership activities



Audience attendance in 2025 was

4.09m

drawn from **100+** countries



Edinburgh residents represent a **third** of all audiences



Participants came from **83** countries and every corner of the world



69%

of all event production spend (£6.6m) was with event production companies in Scotland



41%

of all creative talent spend (£3.6m) was on creative talent in Scotland



Annual net economic impact in Edinburgh of

£558m



Annual gross economic impact in Scotland of

£852m



Net economic impact in Edinburgh over next five years of

£2.79bn



Gross economic impact in Scotland over next five years of

£4.26bn

OVERALL RESULTS OF THE STUDY

“

The Edinburgh Festivals offer a whole world of creative experiences, meaningful moments, and inspiring encounters to residents and visitors alike.

”





1 Social Impact: Audiences

Edinburgh offers an unparalleled range of experiences to visitors from near and far in a uniquely beautiful UNESCO designated location. These features not only mark the city out as a distinctive cultural capital but have helped position it as a world leading festival city.

Edinburgh's Festivals make an enormous contribution to Edinburgh's reputation as one of the most attractive and inspiring cities in the world. From their beginnings in 1947 the Festivals have been instrumental in transforming Edinburgh into a cosmopolitan, outward-looking and welcoming city.

They offer a whole world of creative experiences, meaningful moments and inspiring encounters to residents and visitors alike and generate the cultural energy that sustains the city, and nourishes and uplifts its people.

Building on from our previous impact studies, which have often sought to identify the value of the Festivals beyond the economic, our latest research shows:

Audience attendance in 2025 was **4.09m**, drawn from 100+ countries

Edinburgh residents represent **a third** of all audiences

c80% of audiences see the Festivals as part of what makes Edinburgh a special place to live/visit

c90% of audiences see the Festivals as unique places of cultural discovery

Note: see Appendix A for further information

These findings tell a simple story, but one that is often overlooked by commentators who can be distracted by the scale of the economic impacts of the Edinburgh Festivals: the cultural impact drives the economic rather than the other way around.

In other words, without investment in the unique cultural programmes of the Edinburgh Festivals, the city and the country will not see the resulting economic growth and burgeoning livelihoods for its citizenry.

One specific factor that we know attracts audiences is the international dimension of the cultural offer. In 2025, audiences from 100+ countries came to see representatives from 83 countries participate in the Festivals, with 17 holding country showcases. This international mix and melting pot is part of what makes the Festivals a global cultural phenomenon.

These results tell us that the Edinburgh's Festivals are a crucial element in what makes Edinburgh unique.

They have been essential to defining Edinburgh as an exciting cultural magnet for visitors; a rich, creative working environment for companies and their employees; a lively and vibrant atmosphere in which students can study and socialise; and as a dynamic year-round home for residents – the scale of whose attendance each year highlights that they are the very lifeblood of the Festivals.



“ By any measure the Edinburgh Festivals improve lives for citizens and communities year round. ”

2 Social Impact: Communities



The Edinburgh Festivals are regarded internationally as some of the most accessible in the world in terms of programming, and engage in high quality education and community initiatives that target young people and those who face barriers to participation. Many festival programmes building sustained connections and touring extensively to communities and schools around Edinburgh and beyond.

They offer the residents of the city – and substantial audiences of all ages throughout Scotland – opportunities that support creative expression, social connection and wellbeing, while breaking down barriers to understanding, thus enhancing community cohesion and civic pride.

These core principles were the fundamental building blocks of the PlaCE [Partnerships for Creative Excellence] programme, a pioneering three-way partnership between the Edinburgh Festivals, the Scottish Government and the City of Edinburgh Council which sought to enhance and develop engagement activities across the Festivals.

Our latest research – drawn from the final 2025 report into the PlaCE programme – shows:

245% increase in Festivals partnership activities [from 309 to 1,066]

489% increase in number of community groups engaged [from 64 to 377]

39% increase in number of schools engaged [from 497 to 694]

Over 75,972 community participants across the life of the programme

89.8% of audiences say that the Festivals create a welcoming environment in Edinburgh

Note: see Appendix B for further information on the PlaCE programme

These results show that through this programme the Festivals worked at a new scale in new ways with schools and community organisations across Edinburgh and Scotland. Partners reported strong positive outcomes from the approaches to partnership working and for the communities that were engaged.

There is also strong evidence that:

- Festivals' engagement with new communities was targeted to those who had fewer opportunities to engage with Festival programmes
- activity was well matched to need, as defined by the Scottish Index of Multiple Deprivation
- Festivals developed more sophisticated and equitable forms of engagement in this process.

When set alongside some of the results from audience research – which highlight the Festivals' role in generating civic pride – it is clear that, by any measure, the Edinburgh Festivals improve lives for citizens and communities year round, through significant cultural partnerships and community engagement with their unique cultural programmes.

Such results also demonstrate what can be achieved when local and national agencies work together on shared ambitions and collaborative investment programmes.

3 Cultural Impact: Supply Chain in Scotland



The Edinburgh Festivals are a source of astonishing opportunity and inspiration for artists in Scotland, providing them with the platform to develop, present and promote their work at one of the only truly global-scale living showcases of international culture.

The Edinburgh Festivals have the creative flexibility to embrace and promote the best of Scotland's multi-cultural heritage, to explore and showcase the most exciting of its contemporary cultural invention, and to generate ambitious collaboration between artists based in Scotland and their international colleagues.

They offer critically important platforms to the careers and successful promotion of participants. Each year thousands of Scottish artists and thinkers bring their work, define their reputations and develop new relationships and partnerships in Edinburgh.

Building on such strong platforms, the Festivals commissioned a new study to extend the understanding of their role and impacts in the context of Scotland's National Events Strategy, *Scotland the Perfect Stage 2024 – 2035*, specifically examining how the Festivals function as a national cultural asset for Scotland, looking beyond Edinburgh to the country as a whole.

This latest research, drawn from primary data collated from each of the Festivals' shows:

The Festivals invested **£10.2m** in creative talent and event producers based in Scotland during 2024/25

Total spend on event production was **£9.6m** in 2024/25

Total spend on event production companies in Scotland was **£6.6m** [69% of all event production spend] in 2024/25

Total spend on creative talent was **£8.8m** in 2024/25

Total spend on creative talent in Scotland was **£3.6m** [41% of all creative talent spend] in 2024/25

Note: see Appendix C for further information

These findings show that the Edinburgh Festivals are a key investor in the cultural supply chain in Scotland, comparing favourably when sat alongside such programmes as Creative Scotland's Open Fund for Individuals with its overall annual budget of £5 million. But the Festivals role goes far beyond mere numbers. The international profile, the variety of events, and the number of participants, combines to give the Festivals a unique role in the cultural and events ecosystems across Scotland.

“ The Edinburgh Festivals are a source of astonishing opportunity and inspiration for artists in Scotland. ”



Edinburgh International Festival. Photo by Jess Shurte

Talent, ambition, skills, jobs, ideas and inspiration circulate through a national cultural system energised by the Festivals, but they often do so in 'informal' ways that prevent the full extent of this contribution from being fully understood or recognised. This differs from many other global cultural initiatives, such as European Capital of Culture programmes, whose often top-down sectoral support contrasts with the organic independent evolution of the Edinburgh Festivals activities.

It is essential, therefore, to implement a more systematic and intentional framework for capturing, assessing and communicating these impacts, ensuring that the Festivals' true value is recognised, supported and strategically advanced. Furthermore, it should be noted

that the full value is also restricted at present by containing figures from the Edinburgh Festival Fringe Society but not for the full expenditure for the Edinburgh Festival Fringe itself – a situation which we anticipate will be remedied by planned future research.

In conclusion, although the Edinburgh Festivals are not in themselves sectoral lead bodies – being primarily visioned, designed and funded as festivals – they are valued as 'leaders' by their various sectors and in some cases are embedded within organisations that take on such development roles. In this context the Edinburgh Festivals play an important central role across the creative and cultural worlds in Scotland – as investors, hubs, networks, key players, lightning rods, collaborators, and colleagues.



4 Economic Impact

A series of Impact Studies in 2010, 2015 and 2022 undertaken by independent consultants BOP Consulting demonstrated the economic impact that the Edinburgh Festivals generate, not just at venues in Edinburgh, but across all sectors of the economy, and spreading out across the rest of the country.

What these reports showed was that as the Festivals have grown in size and stature, they have become an invaluable contributor to the economy of both Edinburgh and Scotland. This economic contribution of the Festivals lies primarily in the expenditure made by audiences and thus highlights their role as leaders in the growing area of experiential cultural tourism.

Our latest research, based on audience data from 2025 and work endorsed by BOP Consulting shows:

Annual net economic impact [GVA] in Edinburgh of £558m during 2025

Annual gross economic impact in Scotland of £852m during 2025

Net economic impact [GVA] in Edinburgh over next five years of £2.79 billion

Gross economic impact in Scotland over next five years of £4.26 billion

Note: see Appendix D for further information

It is important to note that the Festivals themselves do not benefit from such economic impacts. Rather the vast majority of this impact is generated outside of the cultural and events world and is felt instead in hospitality/tourism sectors such as accommodation, food and drink, shopping and transport.

The Festivals economic impact is therefore larger for the wider economy of Edinburgh and Scotland than it is for the cultural economy.

In the context of the wider Scottish economy, the Festivals can be placed centrally within the rapidly growing creative industries sector which was recently calculated as contributing over £5.7 billion annually to the economy.

When one sets economic impacts alongside those of other Scottish destinations and major events staged in Scotland in recent years – e.g. golf tourism on the seven courses in **St Andrews** is worth £317m annually to the Scottish economy, **2023 UCI Cycling World Championships** generated over £205 million for Scotland, over the period 2007–2014 the preparation for and delivery of the **Commonwealth Games** is estimated to have contributed £740 million to Scotland's GVA (£390 million of which was to Glasgow's GVA) – one begins to understand the true impact of the Edinburgh Festivals.

Thus, the scale of the Edinburgh Festivals places the city and the country in the global echelons of the creative, cultural and events world. They are a priceless brand that has resonance across the world and bring a matchless world-wide profile that many nations have sought unsuccessfully to emulate. They are a beacon that provides not only a stage for culture, but a message about the vibrancy of both Scotland and the UK to the world.

They are a national asset of strategic importance whose contribution to Scotland must be vigorously championed and securely sustained through public investment. Such investment is essential, given that the substantial national returns the Edinburgh Festivals generate far exceed the resources received by the Festivals themselves.



Edinburgh Festival Fringe. Photo by David Monteith-Hodge

APPENDIX A

Appendix A: Overview of research into audiences at the Edinburgh Festivals in 2025

Overview of Audiences

Edinburgh's eleven major festivals take place throughout the year, bringing cultural, social, employment and economic benefit to the citizens of the city and region. The data contained in this report was provided by the City of Edinburgh Council from annual reporting submissions made to them by the individual Festivals.

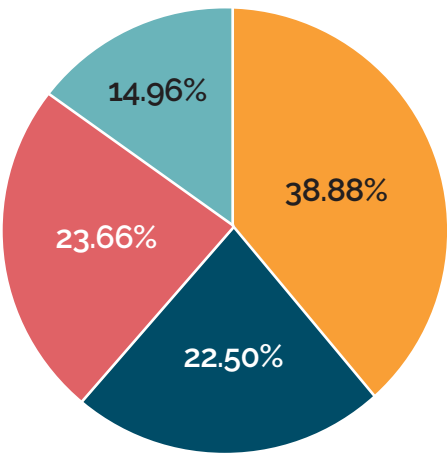
The table below shows the total attendance and the number of unique attendees for both the 2025 period and a number of years preceding that. The data for attendances has been provided by the individual Festivals, with the number of attendees derived from survey data on the number of events attended/per visitor type. This ratio figure was originally calculated as part of the Festivals economic impact study and has been deemed a useful proxy for the 2025 calendar years [source: BOP Consulting].

	2019	2022	2023	2024	2025
Attendance [attendees]	4.96m [1,169m]	3.2m [701,000]	3.45m [749,559]	3.9m [851,052]	4.0m [889,130]

This table shows that the Festivals are on a steady recovery from the Covid-19 period which saw a number of cancellations in the 2020 and 2021 periods, hence the gap in the table, but remain some way short of the attendance levels seen in their peak year of 2019.

So, where do these audiences come from? In turning to an overview of audience geography, we find the following results:

Audience Geography 2025

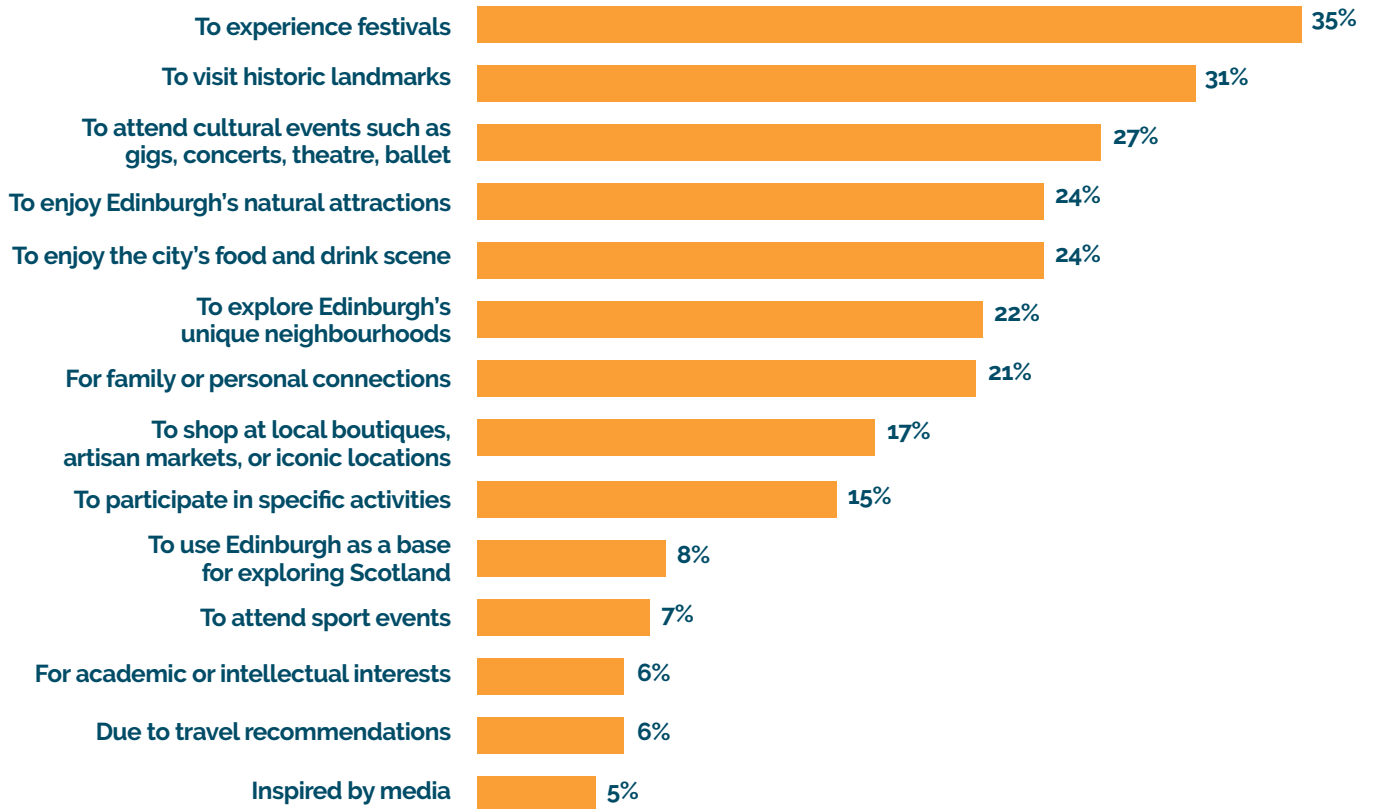


- Edinburgh
- Rest of UK
- Rest of Scotland
- Rest of World

This chart highlights that Edinburgh residents represent a third of all audiences – c1.5m attendances – demonstrating once again how the city's citizens are the very lifeblood of the Festivals.

The strength of local demand is further illustrated by the popularity of the Festivals amongst Scottish audiences, a fact which gives further credence to recent independent research which highlighted that the Edinburgh Festivals were the number one reason for overnight stays in the city by Scottish visitors [source: *56 Degree Insight*, as presented at Edinburgh Tourism Conference 2025].

Top reasons for visiting Edinburgh for an overnight leisure visit during 2024:



Audience Surveys

After the conclusion of each festival, an audience survey process is undertaken across its various and distinctive audiences. As part of our collective impact studies, all the Festivals agree an additional common set of questions that they include within those surveys – with the results of those specific questions then collated, analysed and published as a separate audience survey report.

As anyone who has completed a survey will know: the response rate is inversely proportionate to the length of the survey [i.e. the longer the survey, the less the responses]. With that in mind, during 2025 the Festivals agreed to a reduced set of questions – in the knowledge that a future impact study will include the full range of questions – and further agreed to split these between civic impact and cultural impact, noting that economic impact would be dealt with through a different methodology [see later].

The response rate [i.e. sample size] for these surveys was c8,000, with the results as follows:

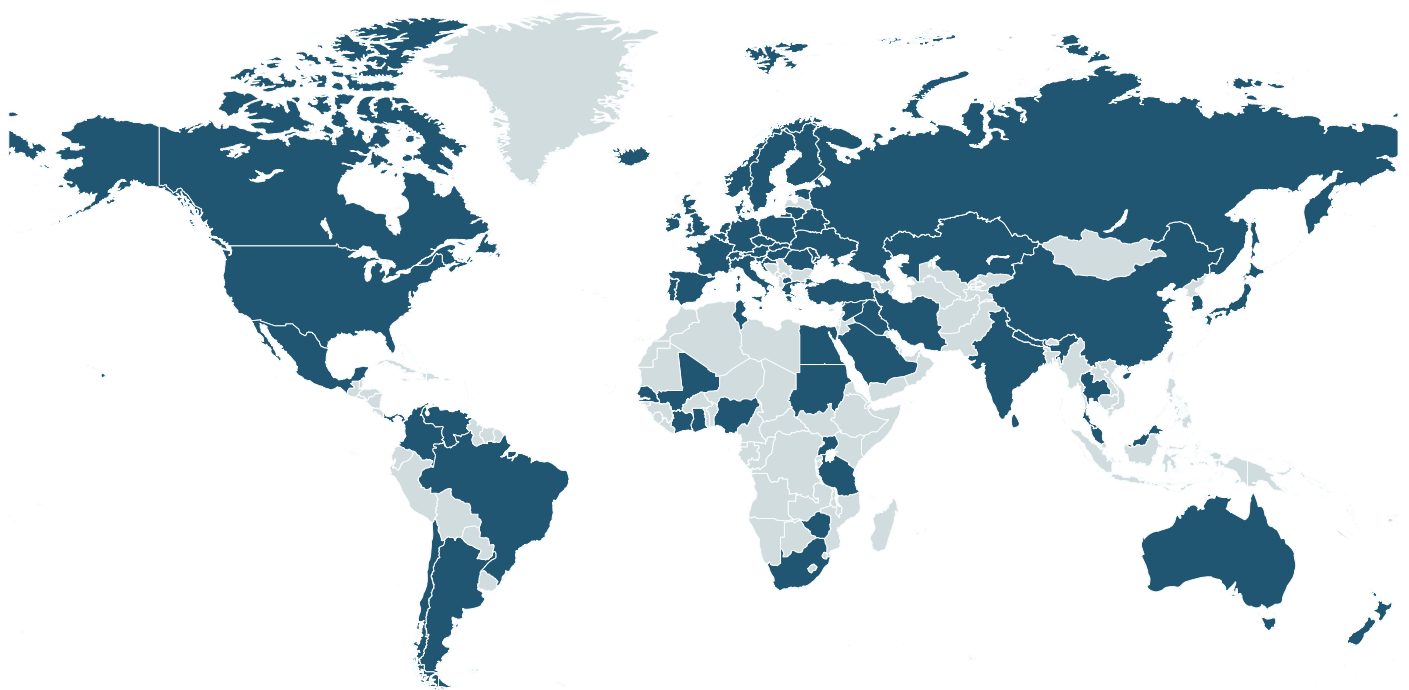
Do you agree or disagree with the following statements? The [name of Festival]...	2025 Strongly/Agree
[Civic pride]: Is part of what makes Edinburgh a special place to live/visit	79.4%
[Civic pride]: Creates a welcoming environment	89.8%
[Cultural impact]: Offers a distinctive audience experience	87.4%
[Cultural impact]: Gives me the chance to see things I otherwise wouldn't see	90.3%

The strength of the civic impacts shows the powerful place that the Festivals have in positioning Edinburgh as a great place to live, work, invest, study and visit. However, it is the cultural impacts that tell us a more profound story about what makes the Edinburgh Festivals stand out in a world of Festivals: they provide a unique and distinct offering. It is the festival programmes, acting as unique places of cultural discovery, that attract audiences which in turn deliver the corresponding economic and social impacts. The cultural impacts drive the economic impacts, not the other way around. As such, investing in these programmes is the surest way of securing the ongoing Festivals impacts and legacies.

One specific factor that we know attracts audiences is the international dimension of the cultural offer. In 2025, audiences from 100+ countries came to see representatives from 83 countries [as shown in the map below] participate in the Festivals, with 17 holding country showcases.

This unique mix and melting pot is part of what makes the Edinburgh Festivals a global cultural phenomenon.

Participants at the Edinburgh Festivals in 2025, by country of origin



Created with mapchart.net



Photo: Scottish International Storytelling Festival. Photo by Ludovic Farine

APPENDIX B

Appendix B: Summary of the final research report into the PlaCE programme, produced in 2025

Background

During 2025 BOP Consulting completed an **evaluation study**, commissioned by Creative Scotland, into the five-year Edinburgh Festivals Platforms for Creative Excellence (PlaCE) programme.

The PlaCE programme was launched in 2018 as a legacy of the Festivals' anniversary the previous year. By allowing Festivals to focus on their programming offer, PlaCE was intended to catalyse a step-change in how Edinburgh's Festivals enact their role in relation to the development of Scotland's creative sector, their connectedness to diverse communities, and the way Scotland presents itself to the wider world.

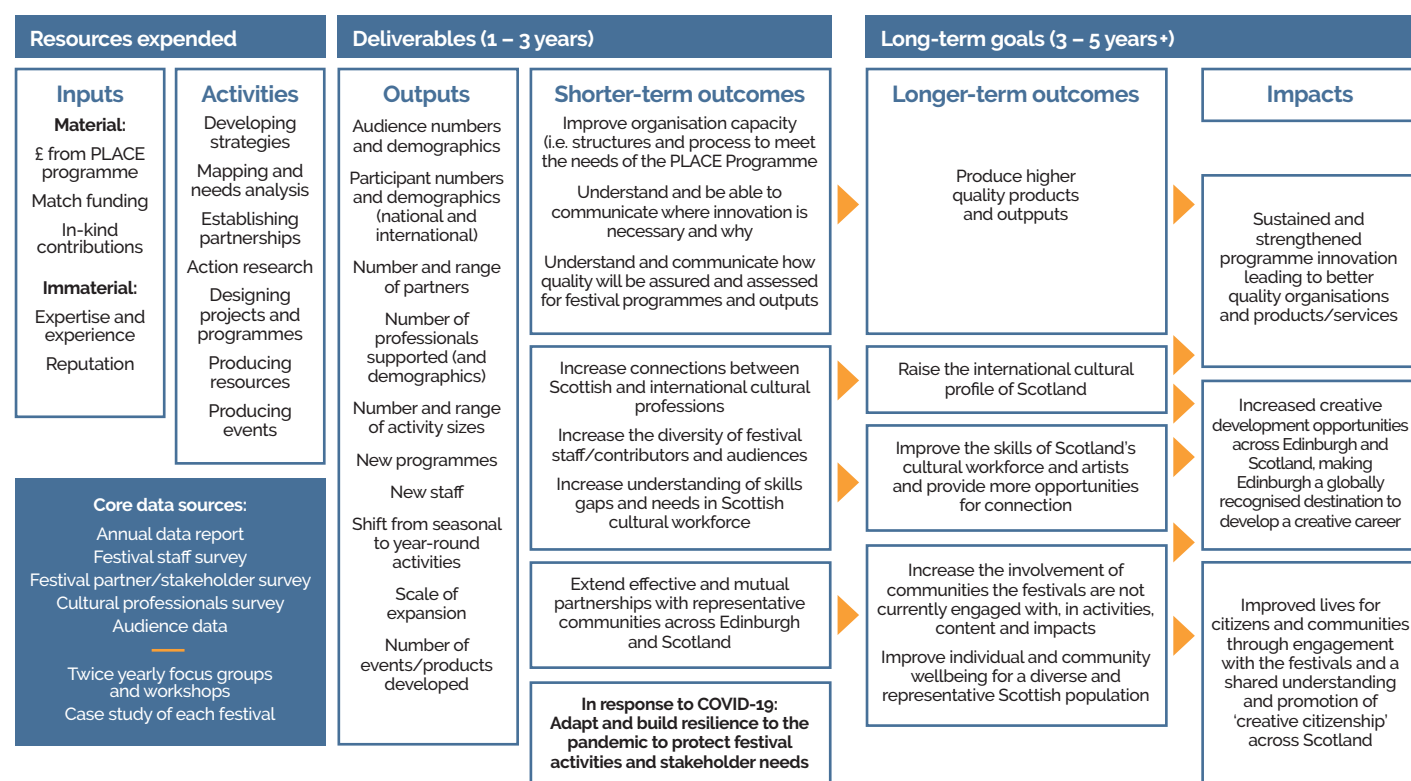
The programme was a unique three-way partnership between Scottish Government, City of Edinburgh Council, and Edinburgh Festivals, with each partner committing £5 million over five years, delivered in two stages – with the overall programme supported and administered by Creative Scotland.

Funds were distributed relatively openly, with Festivals able to make use of the finance flexibly and adapted to their own needs and aims. Each programming strand covered a broad range of activities, with great diversity in size, scope, geography and delivery model of activities across the Festivals. While many new projects were developed through PlaCE, in some cases the fund was also used to bolster existing projects and work streams.

Evaluation Framework

The evaluation was structured around a Logic Model (see below), designed to map PlaCE programme activity across shorter term deliverables and intended outcomes; longer-term intended outcomes; and overall programme impacts. The Logic Model was accompanied by a set of indicators and tools which were used to provide evidence of intended outputs and impact. The overall evaluation framework was developed in collaboration with the Festivals and funders to ensure it represented the reality of the programme based on their interpretation of the fund's original aims.

Platforms for Creative Excellence Programme



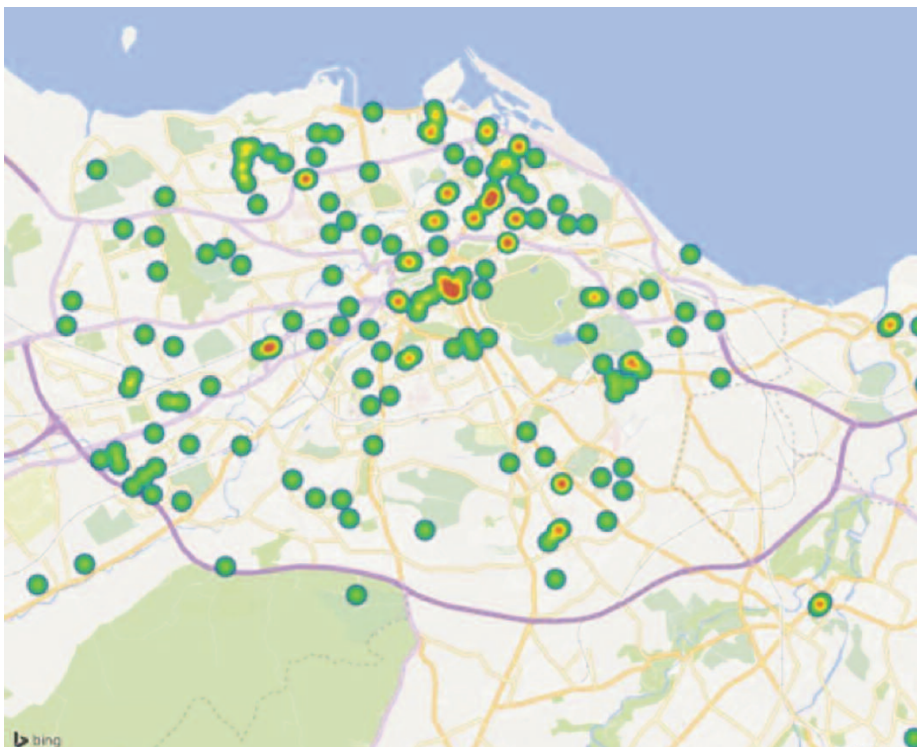
Results

Despite the period being hugely impacted by the Covid-19 pandemic, the Edinburgh Festivals were able to deliver a programme that, by any measure, can be seen to have improved lives for citizens/communities through a significant increase in cultural partnerships and community engagement with Festivals' activity.

There is strong evidence that Festivals worked at a new scale and in new ways with schools and community organisations across Edinburgh and Scotland. Partners reported strong positive outcomes from the approaches to partnership working and for the communities that were engaged. There is also strong evidence that Festivals engagement with new communities was targeted to those most likely to be unengaged, and that Festivals developed more sophisticated and equitable forms of engagement in this process.

Quantitative findings [primarily through management information]

- Over 363 new sector partnerships created across the life of the programme
- Number of partnership activities rose from 309 to 1066
- Over 733 projects co-created across the life of the programme
- Increase in CPD participants from 551 to 720
- Increase of community groups engaged from 64 to 377
- Over 75,972 community participants across the life of the programme
- Increase in number of schools engaged from 497 to 694
- Over 98 news strands of activity across the life of the programme
- Over 394,936 audiences reached through specific PLACE activity
- Postcode data shows that overall activity was well matched to need, as defined by the Scottish Index of Multiple Deprivation [see map below]



Location of community partners and schools (Edinburgh)

Qualitative findings [primarily through in-depth case study activity]

- Festivals developed partnerships with other professionals in a sense of 'more', 'broader' and 'deeper'.
- Festivals increased international activity and visibility despite the challenges presented by the pandemic.
- Longer-term funding created stronger bases for collaborative working, building improved skills and capacity.
- Festivals offered a wide variety of different CPD opportunities for professionals at different career levels, based on their evolving understanding of sector need.
- Existing evidence suggests improved skills, networking and opportunities among professionals and artists.
- New approaches to working with communities were developed, and in some cases embedded.
- New, more focused school engagement strands were built by some Festivals, leading to new opportunities for pupils and teachers.
- Allowed Festivals to sustain and adapt their offer during the pandemic, supporting a stronger return to 'normal' capacity post-Covid.
- New approaches were embedded in the Festival organisations, influencing wider organisational working.
- Supported the development of new programming strands and innovation.
- Festivals strategically developed and reshaped to support delivery and improve capacity.

Insights from the case studies

- Provided capacity to bring festival work to communities, areas and audiences that couldn't previously be reached due to lack of capacity; expanding Festivals' participant focus as well as increasing community organisations' understanding of the value of arts activity
- Were open-minded rather than prescriptive whilst centrally curated, to ensure themes and delivery were accessible, enjoyable and tailored to community needs
- Allowed participants to harness their imagination, learn about their traditions and gain new creative skills; thereby creating joy and mental health benefits as well as supporting the development of transferable skills (such as communication, collaboration)
- Allowed communities to connect in new ways and engendered charitable activity
- Created new links between Festivals, local artists and communities, offering legacy potential through ongoing relationships and including a more diverse range of artists
- Created direct and autonomous networks between artists and communities by empowering and supporting artists to work directly with communities
- Built new partnerships outside the usual festival circuit, thereby broadening geographic connections and creating new ways to develop artists outside of established Festivals
- Increased community groups' and teachers' understanding of the value of creative activity; how to harness participants'/ young people's imagination and how to run projects
- Created a better level-playing field for entry into the arts for those from lower socio-economic and ethnic minority backgrounds

Playbook of recommendations

This set of recommendations brings together the learning gained by PlaCE delivery partners, strategic stakeholders and programme grantees throughout delivery of the programme, in order to benefit the design and implementation of future programmes.

Programme setup and design

- 1 Time to design a well-structured and thought-through programme is essential.
- 2 Experienced programme managers add value.
- 3 There are advantages and challenges to having multiple funders with different aims and requirements, which need to be considered and addressed at the start.
- 4 Programme design should start off with a clear set of objectives/aims.
- 5 A multi-year approach is hugely beneficial and supports strategic development, but requires time, flexibility and a process for dealing with change along the way.
- 6 There is value in funding different strands of work in parallel that mutually benefit each other.
- 7 Involvement of a Programme Board provides valuable additional input.

Fund distribution

- 8 Inclusion of a verbal pre-selection interview provides grantees with valuable feedback and can unlock understanding on all sides.
- 9 Consideration should be given to how best to distribute funds when grantees are asked to collaborate with external organisations (e.g., community organisations) as part of funded projects, to support equal and equitable partnerships.
- 10 Flexibility of funding provides greater chance of success.

Programme delivery

- 11 Sufficient time for a setup phase needs to be given to grantees at application stage, in particular where projects involve partnerships.
- 12 Promoting partnership working through grants requires time and resource to bed in and maintain.
- 13 There is value in funding core human resource as part of programme grants.
- 14 Allowing for trialling, risk-taking and failure is hugely important for innovation.
- 15 Including scope for regular gatherings between grantees improves knowledge sharing.

Reporting requirements and evaluation

- 16 One should consider the level of reporting required to ensure public accountability, whilst maintaining a light touch by streamlining reporting demands.
- 17 Complexity is introduced to reporting where multiple funders have different requirements. It should be considered how these can be streamlined into a coherent whole that does not overburden grantees.
- 18 Regular face-to-face engagement meetings between grantees and funders/ stakeholders are an effective way to review progress, focus on results and build trust.
- 19 Review of reporting requirements should be considered in particular for longer-term programmes.
- 20 Consistency in reporting is hugely important in multi-year, multi-grantee programmes.



| Lewis Walker, *Bornsick*, at Edinburgh Art Festival. Photo by Genevieve Reeves

APPENDIX C

Appendix C: Research into the impact of the Edinburgh Festivals on the cultural supply chain in Scotland

Background

The Festivals commissioned a new study, through their collaborative vehicle Festivals Edinburgh, to extend the understanding of the Festivals' role and impacts in new areas. In the context of a refresh of Scotland's National Events Strategy, *Scotland the Perfect Stage 2024–2035*, and the approaching 80th anniversary of the beginnings of the Edinburgh Festivals, this research looked specifically at how the Festivals function as a national cultural asset for Scotland, looking beyond Edinburgh to the country as a whole.

In particular, the research aimed to identify and understand the Festivals in terms of two twin strands – looking at how they influence and contribute to Scotland's creative and cultural ecosystem (creative supply chain), and wider events ecosystem (events production supply chain). This 'twin strand' approach has governed the way in which the project methodology was constructed and delivered. In reporting on impacts, however, findings have been streamlined and combined where appropriate to provide a focused overall picture.

Of these two ecosystems, the Festivals' impact in the former (creative and cultural) was already indicated in previous impact studies, which partially explored the impact of the Festivals on the Scottish creative talent that participates.

The Festivals' impact on the events sector in Scotland has not previously been studied – though the 'one Scotland' approach of Scotland's National Events Strategy, *Scotland the Perfect Stage 2024–2035* recognises both the connectedness of the Scottish events sector and the importance of the Edinburgh Festivals. The current research aimed to uncover a clearer picture of the nature of the relationship between the Festivals and the wider events sector.

Methodology

The data request to the Festivals to evidence their supply chain spending in both cultural/creative and events sectors was structured according to two principles: firstly, to gather top level data on expenditure already held by the Festivals; and secondly, to build upon the data collection model used in previous impact studies (also designed and delivered by BOP Consulting).

The request asked Festivals to provide data in three main areas:

- > **direct spend on creative talent (i.e. fees paid to artists/performers/companies but not travel or hospitality)**
- > **event production spend;** and
- > **breakdown of the above spends by location of provider – in Scotland; rest of UK; and rest of world.**

Ten Festivals provided data, and Festivals were supported in providing their data by the research team to ensure consistency. It should be noted that although data was provided by the Edinburgh Festival Fringe Society, this does not include the full costs for the Edinburgh Festival Fringe itself since, as an open access festival, such data is not held centrally but rather retained by individual promoters and participants. It is anticipated that future research will paint a fuller picture of this landscape.

The eleventh festival that participates in Festivals Edinburgh – Edinburgh International Film Festival – was not included on the grounds that it had just moved to new management, meaning that its model of operation was both new and in transition. In future research however, it would be beneficial to include all eleven Edinburgh Festivals.

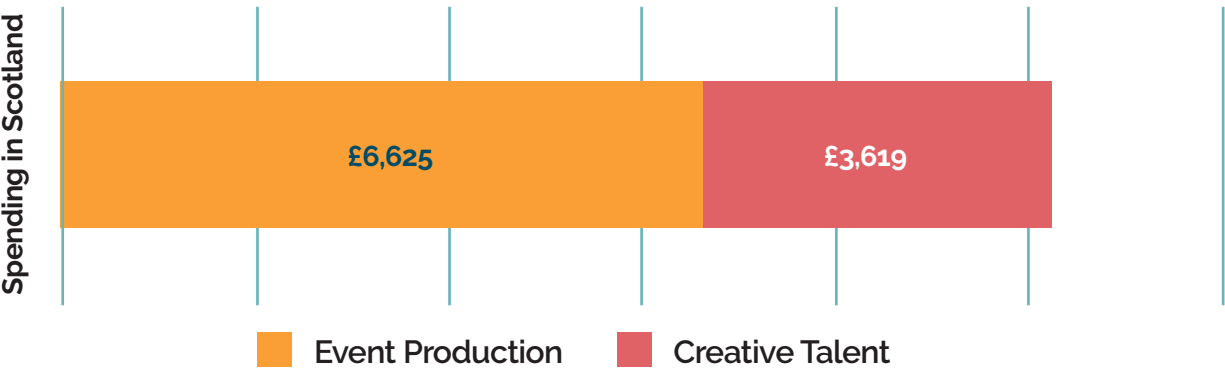
Only financial data relating to direct spend by the Festivals themselves has been included here. In the case of specific project areas of some Festivals, there is additional expenditure on event production and creative talent made by participating organisations. As such the full expenditure in the areas of event production and creative talent required to stage the overall festivals offering is greater than the figures for direct Festival expenditure given here.

Results: General

Thanks to research commissioned by Festivals Edinburgh, the impacts that the Festivals have on the city of Edinburgh and on Scotland's international profile are well documented. This study looked at a new field of enquiry and explored the relatively hidden Festivals' impacts within Scotland's cultural and events ecosystems: as a literature review demonstrated, no body of research yet exists on such regional impacts for cultural events.

The scale of activity in Edinburgh is key and in 2024/25 total spend on event production and creative talent in Scotland was £10.2m:

Edinburgh Festivals' total event production and creative talent spend in Scotland (£000s)

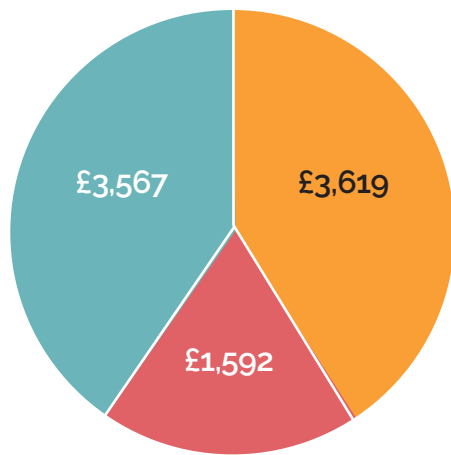


But their role goes far beyond mere numbers The international profile; the variety of events; and the number of participants, permanent and temporary staff, combine to give the Festivals a specific role in the Scotland-wide cultural and events ecosystems. Talent, ambition, skills, jobs, ideas and inspiration circulate through the system, boosted by the Festivals. Being the home of these large-scale, internationally renowned events benefits all Scottish cultural and event organisations.

Results: Creative Talent

The Edinburgh Festivals are one of the largest global gathering of creative talent internationally and have always showcased Scottish talent. This latter element has received added impetus via the Scottish Government's Edinburgh Festivals EXPO Fund, which has as one of its three central aims "to increase the funding available to Scottish artists and practitioners.

Edinburgh Festivals' total creative talent spend by geography (£000s)



The Edinburgh Festivals [excluding Edinburgh International Film Festival and the wider landscape of the Edinburgh Festival Fringe] directly contributed over c£3.6m in fees to Scottish-based creative talent during 2024/25, being 41% of all such expenditure.

■ Scotland
 ■ Elsewhere in UK
 ■ Overseas

The benefits to participating creative professionals are significant and at headline level generic: in taking part, all performers receive the benefits of a professional engagement. Beyond the contractual they gain profile, opportunity to network internationally, the status of taking part in a prestigious global event, and access to a wide network of contacts who may commission or programme their current or future work.

This suggests there is a distinctly national network in which the Festivals support Scottish talent. The importance of this way in which the Festivals help “overcome Scotland's complex geography” was mentioned during the research process: whilst Edinburgh is not the only place creative talent in Scotland goes to gain profile and commercial opportunity, it has the benefit of being accessible and with the resonance of being on home turf.

The inspiration, innovation and international networking that the Festivals provide for creative talent is also vital to the ongoing health of Scotland's creative sector and the cultural sector in which it operates.

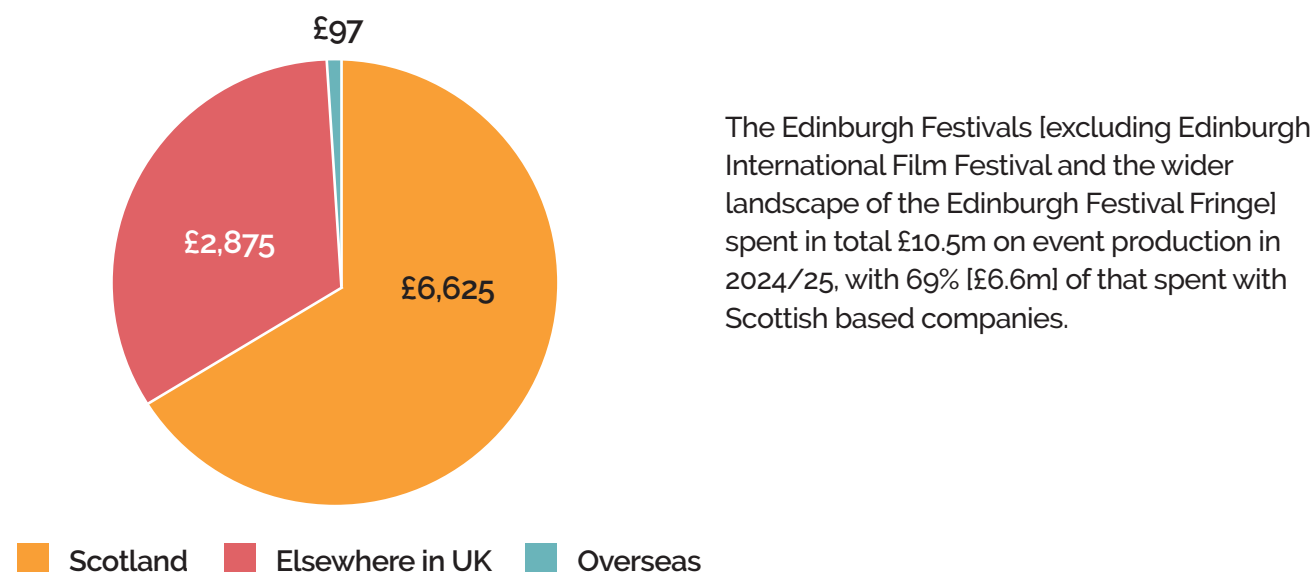
The expenditure of the Festivals on creative talent based within Scotland provides an easily accessible and straightforward indicator of the economic benefit and level of involvement of Scotland's creative talent.

It is recommended that individual stories should continue to be gathered at Festival level and made available for collective illustration of how the Festivals help drive their creative ecosystems.

Results: Event Production

Scotland's National Events Strategy, *Scotland the Perfect Stage 2024–2035* outlines a mission for the event sector in Scotland to function as one, held together by collaborations, knowledge sharing, and a single strategy. The Edinburgh Festivals, as 'signature events' within the national portfolio, play an important role in delivering on the strategy: they provide employment, enhance Scotland's reputation, attract visitors and play a supportive role in the events industry. It is this latter role – the Festivals' support to the Scottish event ecosystem – that has been explored in more depth through this research.

Edinburgh Festivals' total event production spend by geography (£000s)



It should be emphasised that the report includes figures from the Edinburgh Festival Fringe Society but does not include the full costs for the Edinburgh Festival Fringe itself since, as an open access festival, such data is not held centrally but rather retained by individual promoters and participants. As such it is clear that the findings represent a conservative estimate of the overall spend of the Festivals on event production.

Interestingly, however, it is not the size of the Festivals' expenditure that companies generally noted as important when considering the Festivals' role in the events sector. (And in fact, a number of event businesses were clear that, such was the scale of their own enterprise, the Festivals were not a make-or-break percentage of their income.) The importance of the Festivals to the event sector was underpinned by revenue, but came more from other aspects of the relationship. Status and political weight were relevant.

For a few organisations, the association with the Festivals also functioned in a marketing capacity, leading to other business through contacts made via Festivals networks. The regularity, predictability and year-round spread of Festivals activity were also noted as beneficial to planning, budgeting and ensuring a good spread of work: in short, to help manage business risk.

The event production side of the Edinburgh Festivals is competitive, commercial and enjoys a great reputation across the world. The sector sees itself as global, at all levels: venues are proud of training new entrants from across the globe, and much personal connection and interchange has been noted with the Australasian festivals in particular.

That the sector is as much global as national is to be celebrated as a sign of Scotland's prowess as 'the perfect stage' and its development of globally marketable skills.

Additional Thoughts

Although each Festival works differently within its specific cultural sector, this research notes five key common impacts that the Festivals have collectively in the Scottish ecosystems of culture and event production:

- > Scottish creative talent gets high profile promotion in local and international markets that is essential to their financial development
- > for the event production sector, the Festivals create stability: risk is reduced, new talent is developed and professional networks formed
- > the Festivals support sectoral lead bodies through personal networks, brand reinforcement and lending weight to key sectoral discussions
- > a high number of formal and informal training initiatives are built around the rich opportunities that the Festivals present for practitioners, technicians and cultural managers.
- > the 'halo effect' of the global recognition of Scotland as a home for culture gives both cultural organisations and audiences pride and confidence across the nation.

There are a range of specific activities, from networking to training to business development, which occur around the Festivals and support the national cultural and events scene. Various case studies demonstrate how other global cultural initiatives have planned such activity programmes to support their sectors. In contrast, in Edinburgh these activities have evolved independently under a strategic approach which supports bottom-up innovation. While this is beneficial, the organic nature of such activity often means that their collective impact is not sufficiently understood or recognised.





Photo: Royal Edinburgh Military Tattoo

APPENDIX D

Appendix D: Updated research on the economic impact of the Edinburgh Festivals

Background

Economic impact is interpreted within the various Impact Studies undertaken by the Edinburgh Festivals as the contribution made by the Festivals to the economy's output – measured as Gross Value Added (GVA) and Full Time Equivalent (FTE) employment, for both Edinburgh and Scotland. The calculations are based on the analysis of the following two strands of expenditure: audience expenditure, as well as expenditures by performers and delegates, and Festival organisers' expenditure.

The figures for each type of expenditure can be presented as a gross figure. However, a key part of the economic modelling process, as recommended by HM Treasury and the Scottish Government, is to establish what proportion of expenditure is genuinely 'additional' for each strand, to arrive at the net value.

This process means subtracting the expenditure that would have occurred anyway (the 'deadweight'), as well as that which is simply displacing or substituting other expenditure, and expenditure which is made outside of the target geographies of Edinburgh and Scotland ('leakage').

Once the net expenditure has been calculated, the final stage is to estimate how this flows through the economy to generate additional output, GVA and employment. This is calculated by applying multipliers to the direct expenditure. A more detailed account of how the economic impact has been calculated is contained within a previous [Technical Report](#).

Impact Study Methodology

The foundation for the economic impact of the Festivals is the sheer number of audiences that they attract, for both paid events and free events. In establishing the economic impact of these attendances, it is first important to know how many attendees generated the total number of attendances. Audiences can (and do) attend more than one event per Festival. Once this smaller pool of attendees is known, one can then begin to

estimate the other factors that generate economic impact: what they are spending money on per day and how many days and nights their trips to the Festivals encompass.

For each Festival, average daily expenditure for each visitor type is calculated. This includes:

- > expenditure made at the Festival venues (e.g. at the bar/café)
- > expenditure outside the venues (e.g. shopping, food and drink, entertainment)
- > transport expenditure
- > accommodation

As in previous BOP Impact Studies, ticket expenditure was not assessed through the visitor survey and was instead provided by the Festivals themselves from their actual box office data

A factor that has to be defined in the expenditure calculations is: how much of the expenditure made during a trip to the Festivals is allocated to the Festivals? In this study (as in previous Impact Studies), the calculation is based on a 'whole trip' expenditure model whereby if a visitor indicates in their survey response that they would not have otherwise come to Edinburgh/Scotland were it not for the Festivals – then all of the expenditure made on the trip is included.

Following all best practice in economic impact assessment and appraisal, such as that specified by the Scottish Government and HM Treasury, a key stage of the economic impact calculations is to assess the proportion of expenditures made by all visitor types that would have been made in the city in any case. This entails converting the gross economic impact into the net economic impact. What is important to note is that additionality varies by the place of origin of the audience, in connection with the geography of the economy that is being assessed. Once the additionality for the Festivals has been established, it is possible to convert the gross visitor expenditures made at the Festivals into net expenditure – i.e. the proportion of expenditures that is genuinely additional.

Impact in 2025

Ahead of the next edition full-scale Impact Study, the Edinburgh Festivals worked with BOP Consulting to undertake an indicative study for 2025, extrapolating their impact from existing organisational and audience datasets.

The starting point, as with all Impact Studies, was an understanding of the audience numbers and this process has been improved in recent years through the development of official statistical reports drawn up in partnership between the Edinburgh Festivals and the City of Edinburgh Council.

	2015	2019	2022	2023	2024	2025
Attendance [attendees]	4.54m [1,071m]	4.96m* [1,169m]	3.2m* [701,000]	3.45m* [749,559]	3.9m* [851,052]	4.0m* [870,856]
Audience Breakdown*						
Edinburgh		37.18%	37.36%	36.64%	35.75%	38.88%
Rest of Scotland		22.46%	16.32%	18.13%	17.91%	22.50%
Rest of UK		29.97%	34.63%	31.67%	32.44%	23.66%
Rest of World		10.39%	11.69%	13.47%	13.91%	14.96%

**These figures are taken from official City of Edinburgh Council reports as follows: 2019, 2022, 2023, 2024, and 2025*

The two key measurement points in this study are the 2022 figures, being the last full Impact Study, and the most recent full year of the Edinburgh Festivals, being the calendar year 2025. Our calculations focussed on two key elements within those measurement points: namely the audience growth from 2022 to 2025, and the inflationary change in that same period.

On that basis we can identify that the audience figure in 2022 was c20% lower than the 2025 figure, and if we apply that same logic to the economic impact – i.e. increasing the figure by 20% – we arrive at a net economic impact figure in Edinburgh of £488m. Obviously during that period there has been changes to the rate of inflation and so if we adjust the impact figure accordingly, using the official [Bank of England inflation calculator](#), we arrive at a net economic impact figure in Edinburgh of £558m.

	2022	2022–2025 Change	2025	2022–25 Change	2025
Audience	3.2m	c20% increase	4.0m	n/a	4.0m
Impact: Edinburgh [net GVA]	£407m	c20% increase	£488m [no inflation]	Bank of England inflation calculator	£558m
Impact: Scotland [net GVA]	£313m	c20% increase	£367m [no inflation]	Bank of England inflation calculator	£420m

As stated earlier, applying additionality rules to visitor expenditure within the Festivals evaluation model (following Treasury Green Book rules), results in the large majority of expenditure made by locals being discounted from the calculation. Thus the model de facto privileges the economic value brought by staying visitors, i.e. tourists, and particularly those from outside Scotland and the UK.

Most programming decisions reflect the fact that the Festivals are strongly rooted in their local and national, Scottish contexts – and most public funders such as City of Edinburgh Council and Creative Scotland fund them for these reasons. Thus, the strategic objectives of the Festivals themselves and many of their key stakeholders, do not dovetail neatly with the Green Book appraisal process.

Relatedly, there has been a growing interest in our post-Covid world in the opportunities that domestic visitors can have on a local economy and thus a drive to develop models that highlight the importance of retaining domestic income in an economy as well as attracting external money into that economy.

Consequently, in our 2022 Impact Study we reported gross figures alongside net impact. The gross figures represent the full economic footprint of the Festivals, which shows the total scale of activity and expenditure they generate, including that made by local visitors. The net figures apply additionality adjustments to arrive at the additional economic value generated, over and above what would have occurred in the absence of the Festivals. This decision was followed again for this report and the process already outlined above was again undertaken, resulting in the results below:

	2022	2022–2025 Change	2025	2022–25 Change	2025
Audience	3.2m	c20% increase	4.0m	n/a	4.0m
Impact: Edinburgh [gross]	£492m	c20% increase	£590m	Bank of England inflation calculator	£675m
Impact: Scotland [gross]	£620m	c20% increase	£744m	Bank of England inflation calculator	£852m

From these calculations, it is therefore possible to create a simple forecast of the economic impact of the Edinburgh Festivals over the next five-year period (being the normal lifetime of a Parliament). This is most likely a conservative estimate as it assumes no increase in overall attendance, despite this being the trend across the last four years of data (2022–2025). The forecast is as follows:

	Annual Contribution	Five Year Contribution 2026 to 2031
Edinburgh: net Economic Impact [GVA]	£558m	£2.79 billion
Scotland: gross Economic Impact	£852m	£4.26 billion

In making these calculations, and arriving at our economic impact figures, we have deliberately erred on the side of caution, seeking only to use such foundational numbers as are publicly available and to only adjust these in a manner that is logical, reasonable and conservative.

As Richard Naylor, Director of Research, BOP Consulting, states: *“The economic impact figures reported by the Edinburgh Festivals are extrapolated from our original impact studies. We think they represent plausible estimates of the likely current position. The Festivals have been gathering data on audience composition since we last undertook the study, and the make-up of the audience (e.g. locals, day trippers, visitors from the rest of the UK or overseas) is consistent with what we established in 2022, and this is the biggest determinate of audience expenditure alongside overall attendance figures (which the Festivals have also updated).”*





The Edinburgh Festivals represented in this Impact Study, and listed at edinburghfestivalcity.com, are:
Edinburgh Science Festival, Edinburgh International Children's Festival, Edinburgh Jazz & Blues Festival,
Edinburgh International Festival, Edinburgh Festival Fringe Society, The Royal Edinburgh Military Tattoo,
Edinburgh Art Festival, Edinburgh International Book Festival, Edinburgh International Film Festival,
Scottish International Storytelling Festival, and Edinburgh's Hogmanay.

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