

QUANTIFICATION OF HIRING BY MEANS OF FIRATÀRREGA (2011 and 2012 editions)

Summary of results

July 2013





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▶ **Introduction**

In 2010, FiraTàrrega conducted a study to quantify the economic return that the fair has worldwide. This objective has been expanded this year as well as the need to analyse the overall economic return of the fair.

The results of the study will support decision-making for the forthcoming edition of the fair.

Moreover, Gabinet Cere has been involved in the project to make it possible and to make it clear to other institutions the need to work with objective information for future planning.

▶ **General purpose**

This study's main aim is to quantify the volume of performance contracts for national and international companies generated by means of FiraTàrrega 2011 and 2012, while further studying in depth aspects to improve FiraTàrrega.

In order to deepen the level of return on investment made in the fair, we have studied the malfunctions between supply and demand. Therefore, in addition to the analysis of various aspects of the fair, we have quantified the level of contracts that have occurred as a result of the fair and the reasons why these relationships go forward or are carried out.

▶ **Specific objectives of the study**

- ▶ Estimate the level of hiring and performances from companies who participated in FiraTàrrega.
- ▶ Identify the extent to which contacts are made that do not bear fruit afterwards and identify the causes.
- ▶ Identify the factors that cause programmers to make contact with companies.
- ▶ Approximation of the quantification of the total volume of contracts in monetary units



- **Name:** Quantification of hiring by means of FiraTàrrega.
- **Scope:** National and international
- **Work world:** Consists of:
 - all professionals and organizations that attended the 2011 and/or 2012 editions
 - All companies that have performed in the 2011 and/or 2012 editions.
- **Sample size consulted:**

- Companies:

Universe	SURVEY SAMPLE	HIRING SECTION SAMPLE
77 companies	49 companies	69 shows

- Organizations globally:

Universe	SAMPLE
581 organizations	207 organizations

- Organizations with capacity to contract

Universe	SAMPLE
344 organizations	147 organizations

- **Sampling procedure:** Because the universe is finite and limited, the prior goal was to reach as many entities and companies as possible, without having to create an a priori sample design.
- **Method of data collection:** Administration of a structured questionnaire aimed at supporting organizations such as telematic companies. Periodically, field checks have been carried out as well as telephone and email reminders to participants who had not responded to the questionnaire in order to achieve maximum performance. The expected duration of the survey is 10 minutes. Finally, telephone surveys have also been carried out and other calls to complete information about companies and organizations that had not electronically answered or verify inconsistencies in the answers.
- A monitoring has been carried out according to the source, to ensure sufficient samples in different layers.
- **Fieldwork dates:** 20th June to 19th July 2011.
- **Promoter of the study:** FiraTàrrega.
- **Company executing:** Gabinet Ceres.

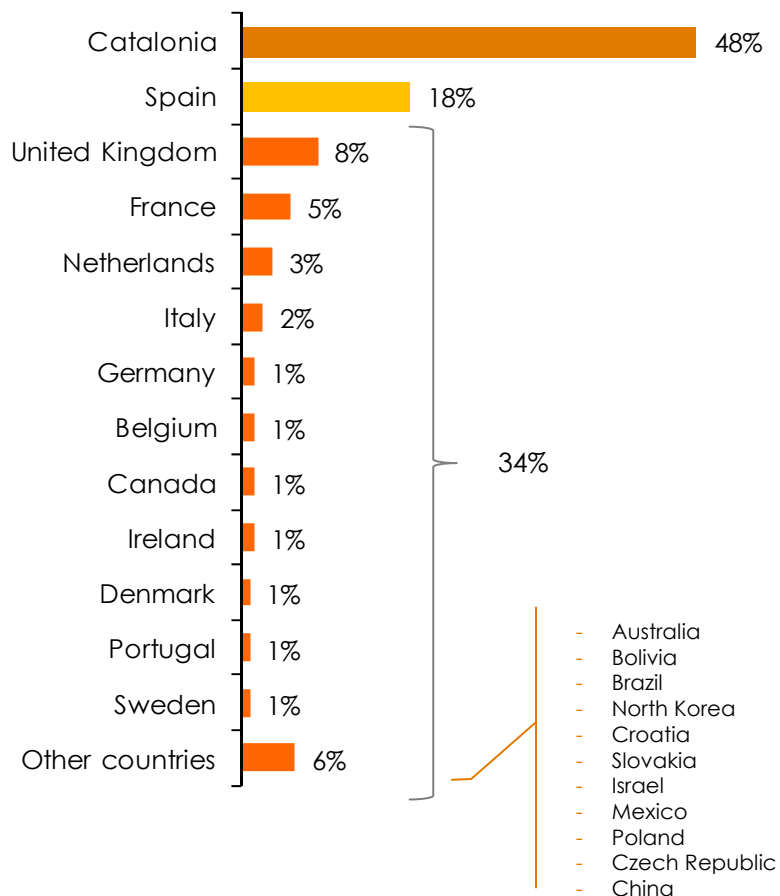


Origin and type of organization

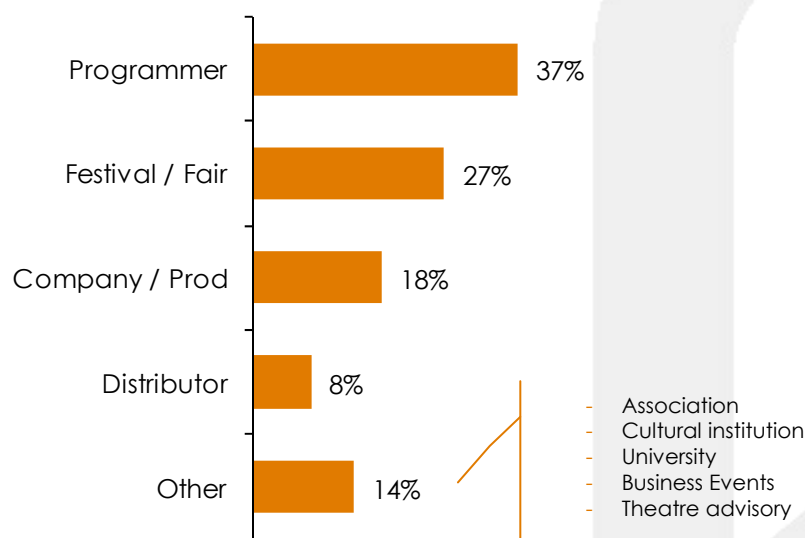
48% of the professionals registered in the 2011 and 2012 editions of FiraTàrrrega who answered the survey come from Catalonia, 18% from the rest of Spain, while the rest (34%) from other countries.

37% of the organizations are programmers, 27% are festivals and fairs, 18% producers, 8% are distributors and the rest, 14% are classified as other.

▶ ORIGIN OF THE ORGANIZATION



▶ TYPE OF ORGANIZATION



Note: the % does not total 100 because multiple answers admitted



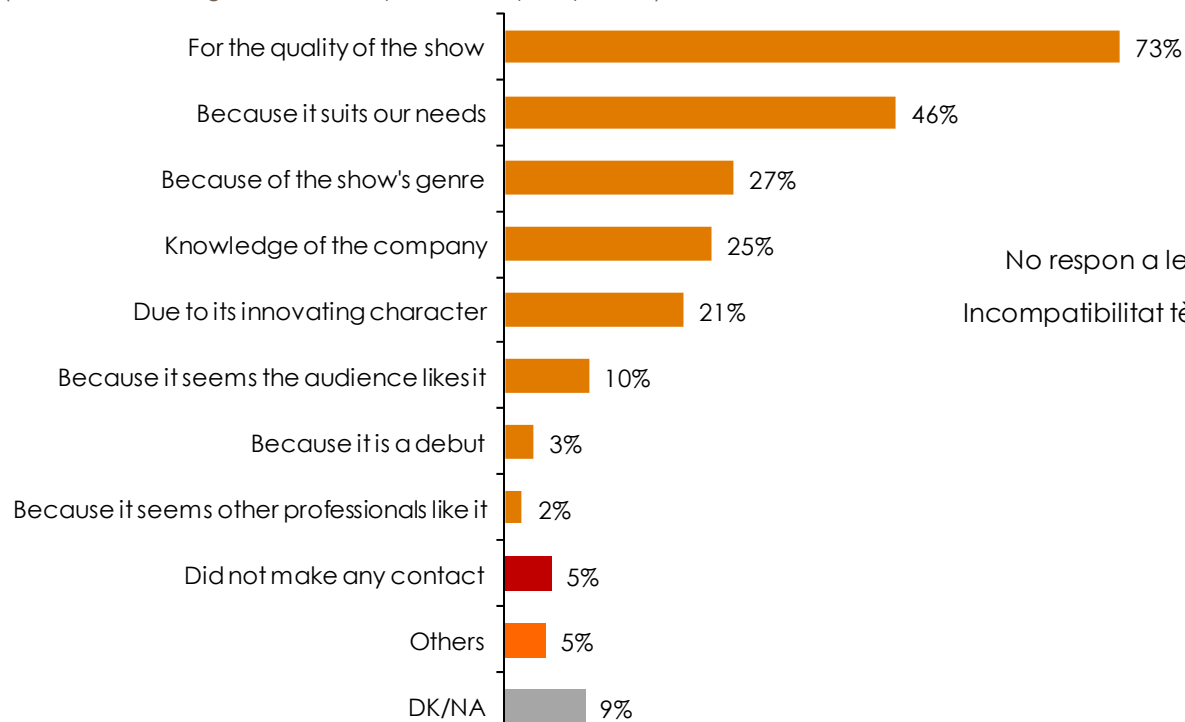
Reasons for hiring and reasons for not hiring

The **quality of the show** is the main reason to hire the companies. Adapting to the needs of these entities is in second place. Further down the list are the genre of spectacle, the knowledge of the company and the innovative nature of it.

The main reason why there has been no agreement is the **price**, followed by the incompatibility of dates and the fact that the show does not meet the programming needs of the organization.

► PRIMARY REASONS FOR CONTACTING THE COMPANIES

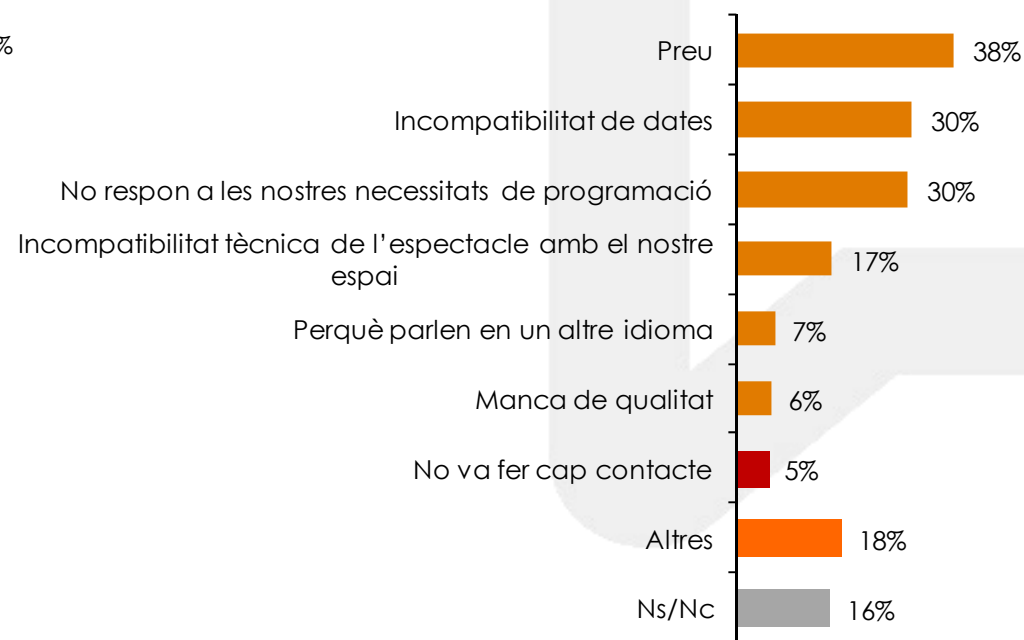
(BASE: 72% of the organizations surveyed have capacity to hire)



Note: the % does not total 100 because multiple answers admitted

► MAIN REASONS FOR NOT HAVING HIRED A PARTICULAR SHOW

(BASE: 72% of the organizations surveyed have capacity to hire)



Note: The organizations that have not responded are not included in the analysis

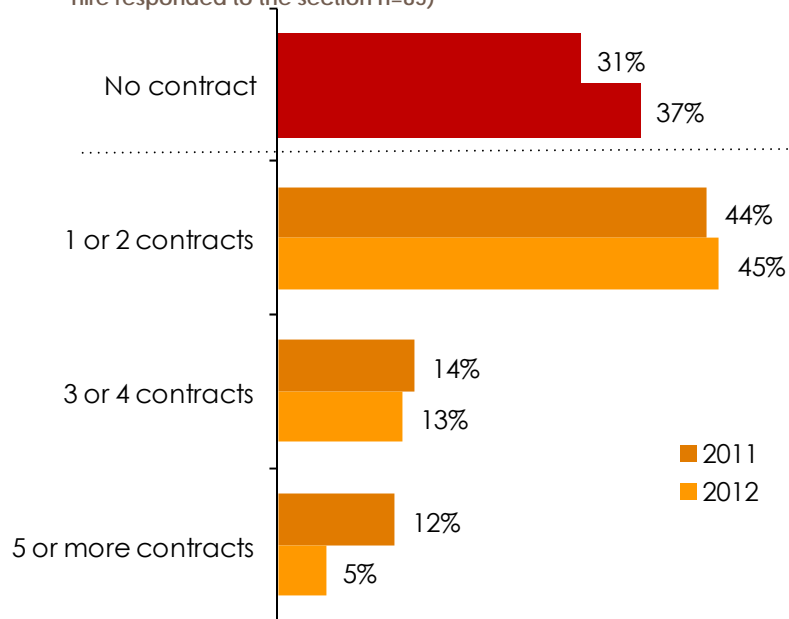


69% of the organizations have hired some of the companies that presented their shows in FiraTàrrega 2011. The majority of the organizations carry out 1 to 2 contracts. An average of 6.6 representations have been hired from the 2011 FiraTàrrega.

In 2012, 63% of the organizations have hired some of the companies that presented their shows in FiraTàrrega. They have hired an average of nearly five performances.

▶ NUMBER OF CONTRACTS MADE

(BASE: 79% of the organizations in the sample with the ability to hire responded to the section n=85)



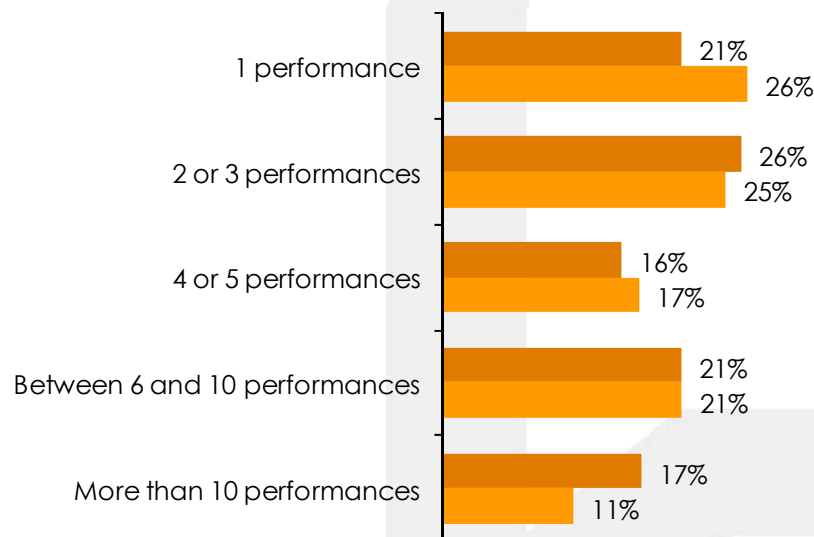
AVERAGE NUMBER OF SHOWS WHAT IS HIRED:

2011: 1.9 **TOUR 21 MONTHS**

2012: 1.3 **TOUR 9 MONTHS**

▶ NUMBER OF REPRESENTATIONS HIRED

(Base: organizations that have hired a company)



AVERAGE NUMBER OF REPRESENTATIONS
 What is hired:
 (Base: organizations that have hired)

2011: 6.6 **TOUR 21 MONTHS**

2012: 4.9 **TOUR 9 MONTHS**

Base: organizations globally

2011: 4.6 **TOUR 21 MONTHS**

2012: 3.1 **TOUR 9 MONTHS**

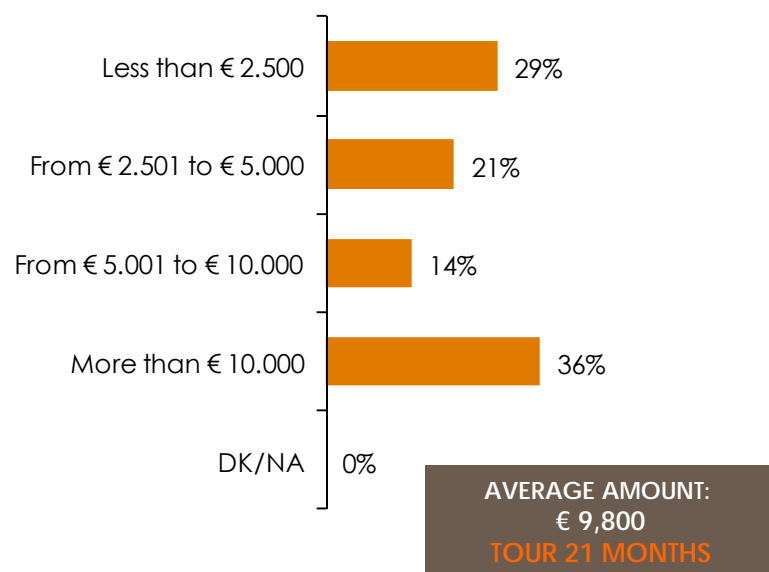


Of the organizations that have hired some show at FiraTàrrega 2011, 36% have spent more than € 10,000 and 29% less than € 2,500. On average these organizations have made an expenditure of € 9,800.

Of the organizations that have hired some show at FiraTàrrega 2012, 58% spent more than € 5,000 and on average these organizations have made an expenditure of € 9,200.

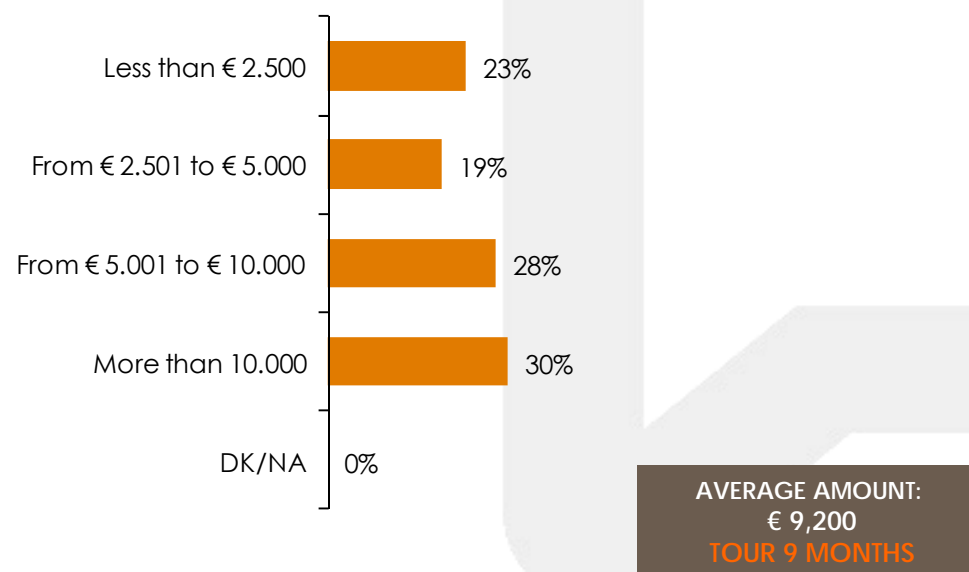
► HIRING VOLUME BY ORGANIZATION IN 2011

(Base: organizations that have hired a company)



► HIRING VOLUME BY ORGANIZATION IN 2012

(Base: organizations that have hired a company)



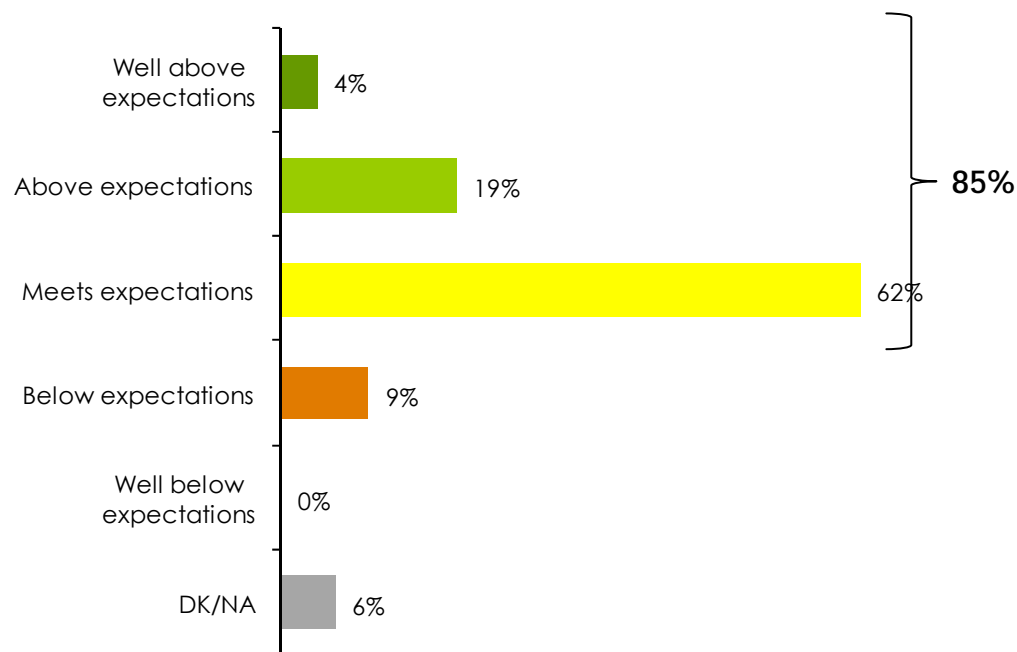
Note: Values without VAT



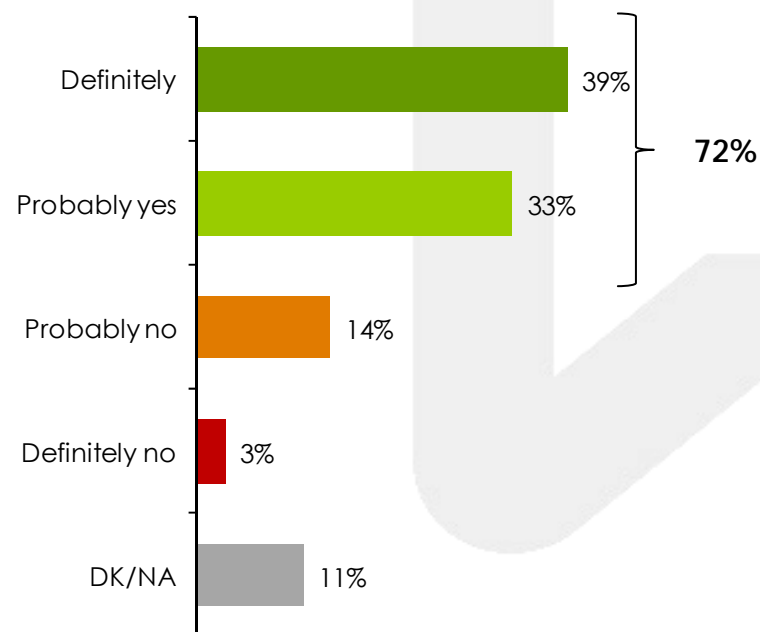
23% of the organizations surveyed believe that the fair fulfils, **above their expectations**, their goals as a market for the performing arts. Organizations in other countries and festivals and fairs think that FiraTàrrega is above their expectations, however, the distributing entities are the ones that indicate that it is below their expectations.

72% of the organizations say they are going **to participate** in the next edition of FiraTàrrega. According to the types of entities, those that are the most loyal return with the most safety.

► DO YOU THINK THAT THE FAIR ACHIEVES ITS GOAL AS A PERFORMING ARTS MARKET?

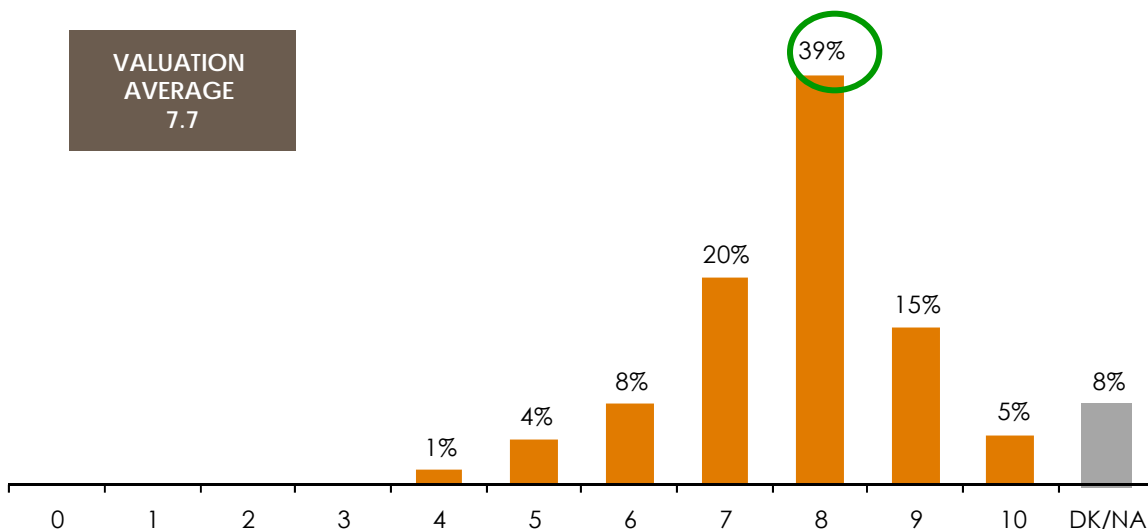


► DO YOU THINK YOU WILL ATTEND THE NEXT EDITION?



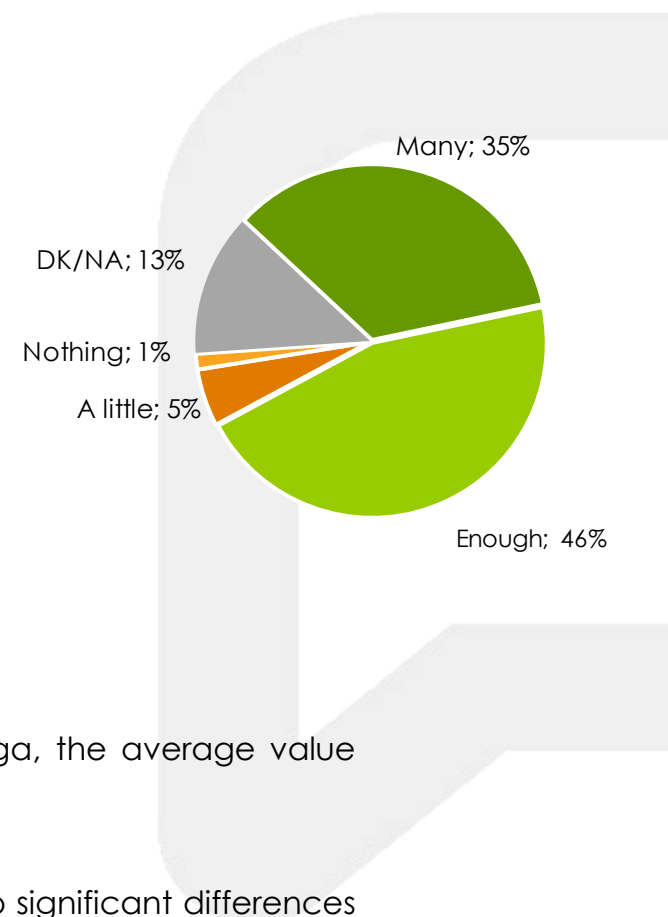


OVERALL RATING OF FIRATÀRREGA



Note: The average ratings did not taken into account the do not knows

► TO WHAT EXTENT DO YOU ASSOCIATE FIRATÀRREGA WITH A PUBLIC SERVICE CULTURE?



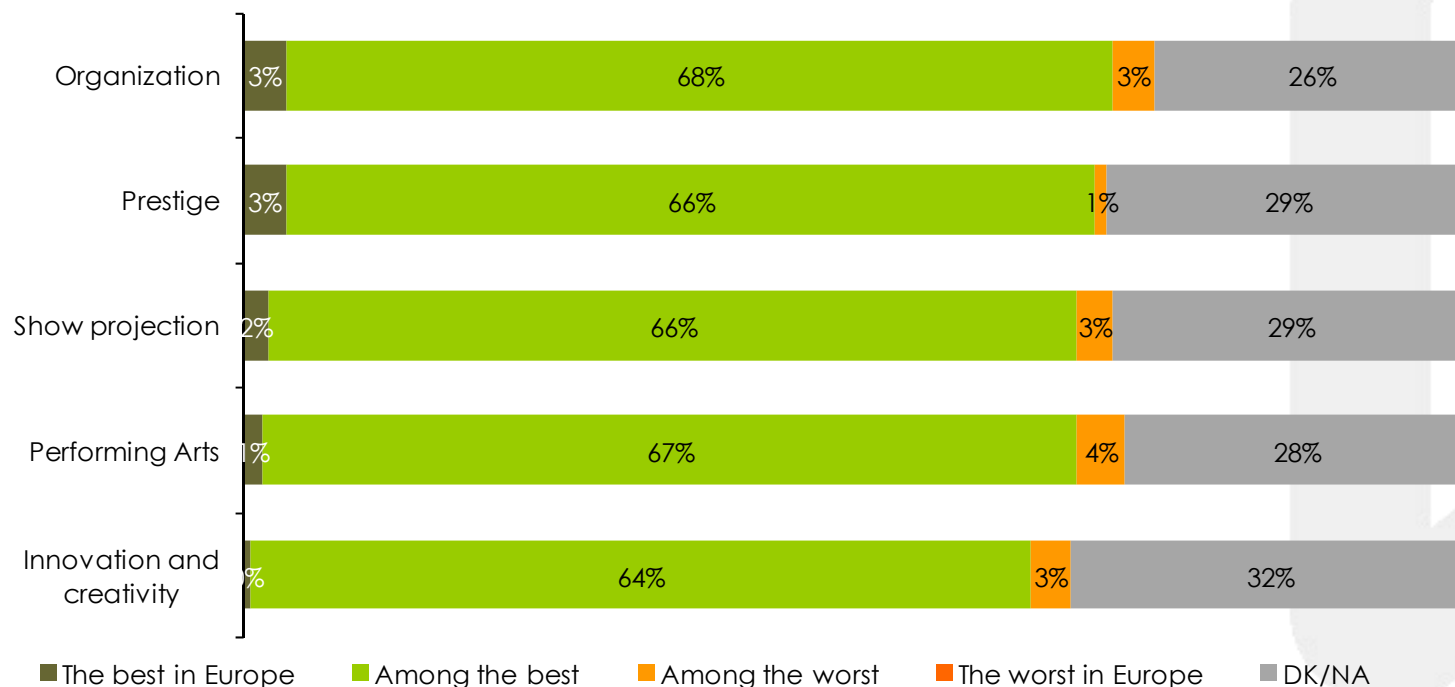
In general, the organizations surveyed give a **very positive** assessment of FiraTàrrega, the average value being 7.7.

81% of the organizations believe FiraTàrrega is a **culture public service**. There were no significant differences according to the type of institution.



Globally, the organizations consulted place **FiraTàrrega among the best in Europe**.

Although there are almost no differences between the different aspects analysed in relation to other fairs existing in Europe, the organizations consulted first highlighted the organization of the fair. Second, its prestige and third, the fact that is one of the best platforms to project shows and one of the best performing arts markets.



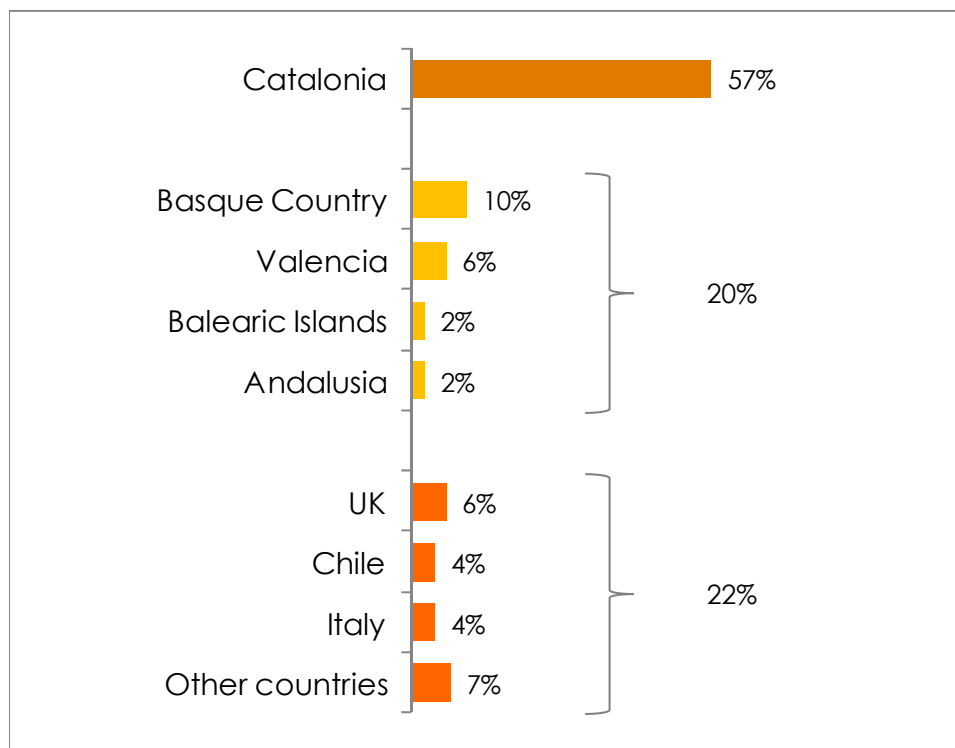


Concept and type

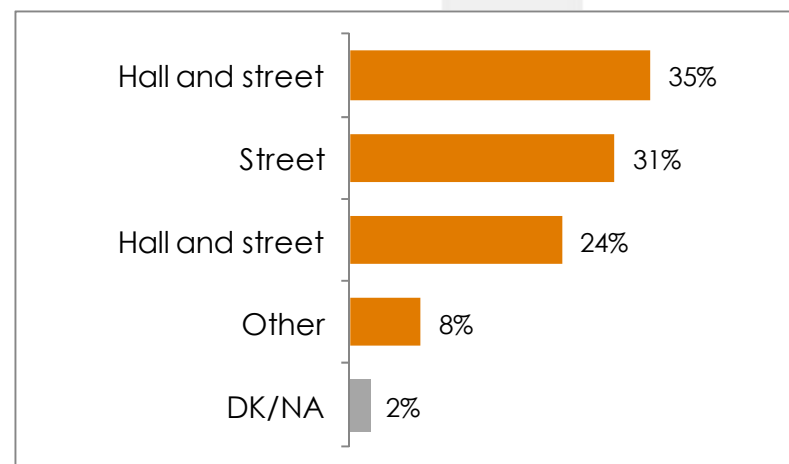
The majority of the companies surveyed are from Catalonia (57%), the rest of Spain accounted for 20% and other countries account for 22%.

By type of company, 35% are both street and hall companies and 31% are only street. The remaining 24% are hall companies and 8% are other types of companies.

▶ ORIGIN OF THE COMPANY



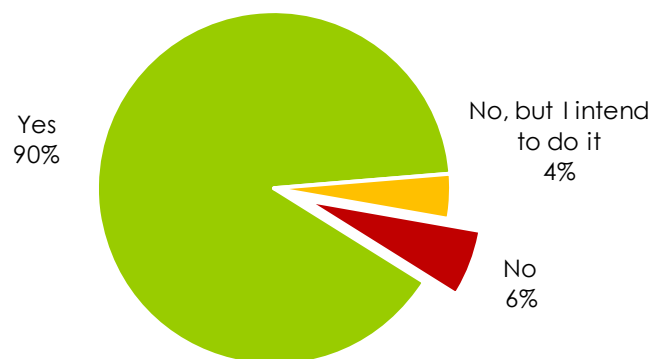
▶ TYPE OF COMPANY





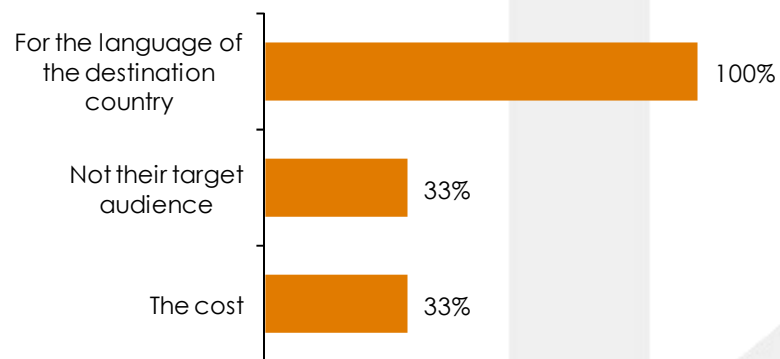
The vast majority of companies **are** targeting **an international audience**. 6% say that it does not intend to do so, mainly due to language difficulties in the destination country, since it is not their target audience or the cost of acting abroad.

▶ DIRECTED TO THE INTERNATIONAL PUBLIC



▶ REASON FOR NOT ADDRESSING INTERNATIONAL AUDIENCES

(BASE: 6% do not intend on addressing international audiences)



Note: the % does not total 100 because multiple answers admitted



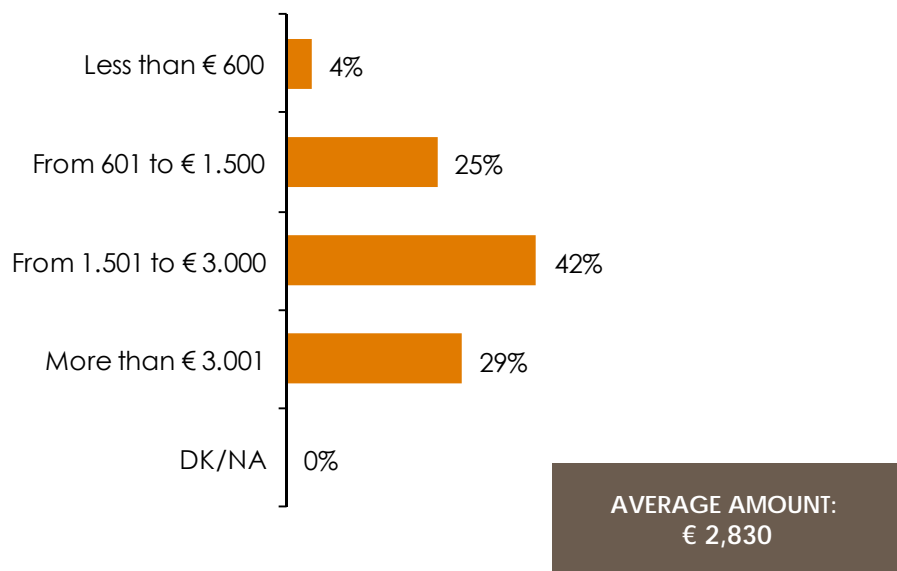
Amount of performances hired by means of FiraTàrrega

The **average market price** of the shows that have occurred in the 2011 and 2012 editions of the FiraTàrrega is around € 2,800.

It is noteworthy that the performances of the oldest companies and the rest of Spain are those with a higher average cost.

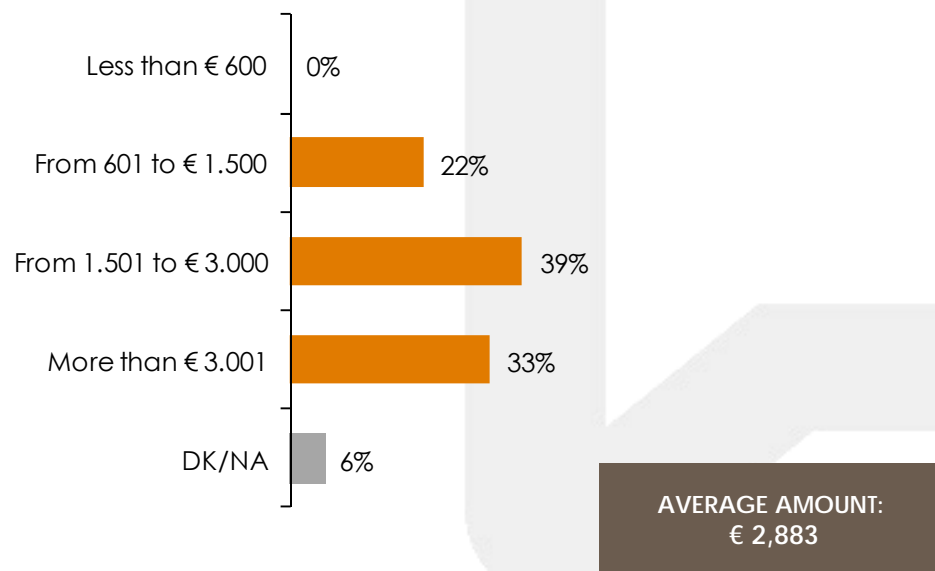
▶ AMOUNT OF REPRESENTATION IN 2011

BASE: 69% of the shows that have responded were hired as a result of the 2011 edition



▶ AMOUNT OF REPRESENTATION IN 2012

BASE: 54% of the shows that have responded were hired as a result of the 2012 edition



Note: Values without VAT

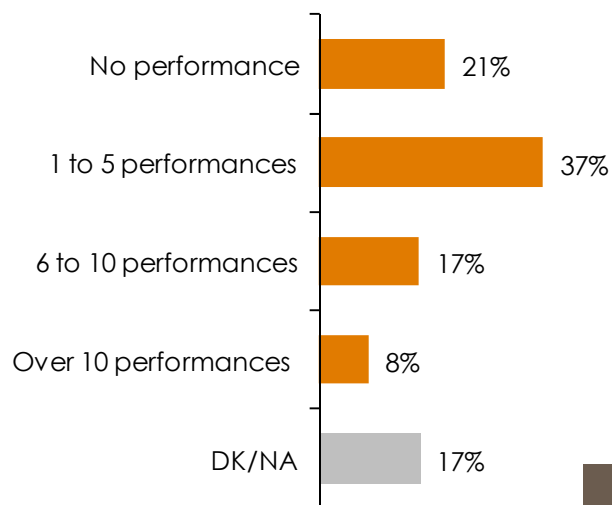


Number of representations contracted by means of FiraTàrrega

Given that almost two years have passed since the 2011 edition, the companies are not aware that they have been contracted as a result of their participation in FiraTàrrega.

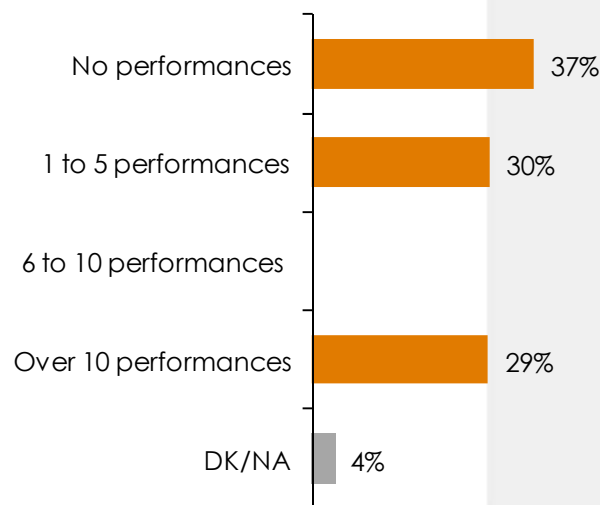
In 2011 the average number of representations that companies say they have hired is 5.1 while in 2012 it is 7.4.

► NO. OF PERFORMANCES HIRED 2011



Average number of performances
5.1
TOUR 21 MONTHS

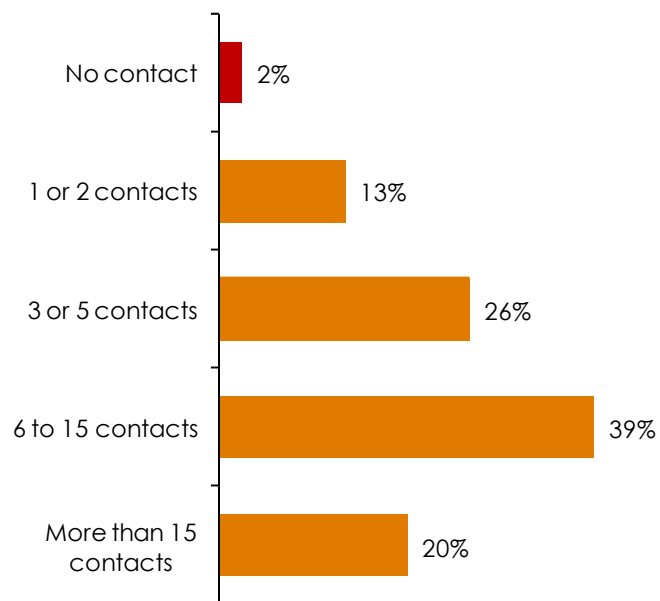
► NO. OF PERFORMANCES HIRED 2012



Average number of performances
7.4
TOUR 9 MONTHS



► NUMBER OF CONTACTS MADE



Most companies participating in FiraTàrrega made some **contact** in the last edition in which they participated.

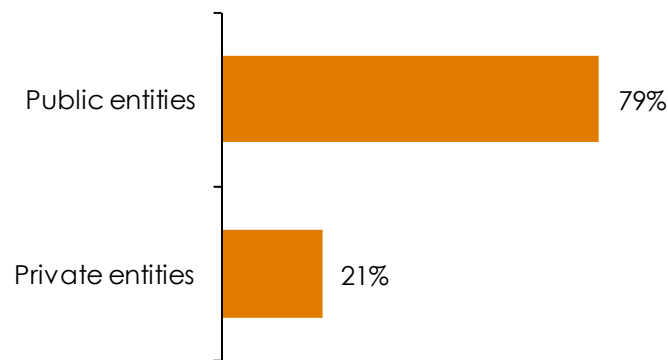
39% of the companies have made 6 to 15 contacts and 20% have made more than 15.

AVERAGE NUMBER OF CONTACTS THAT HAVE BEEN MADE:
9.0



► DISTRIBUTION OF PERFORMANCES BY TYPE OF CONTRACTING ENTITY

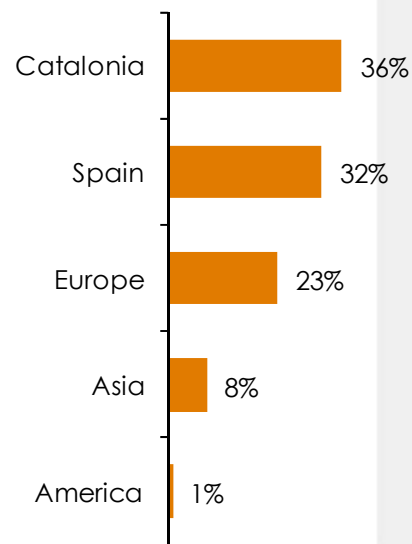
BASE: 53% of the companies have responded to this question



79% of the performances from the companies participating in FiraTàrrrega have been hired by public entities.

► DISTRIBUTION OF PERFORMANCES BY PLACE

BASE: 53% of the companies have responded to this question



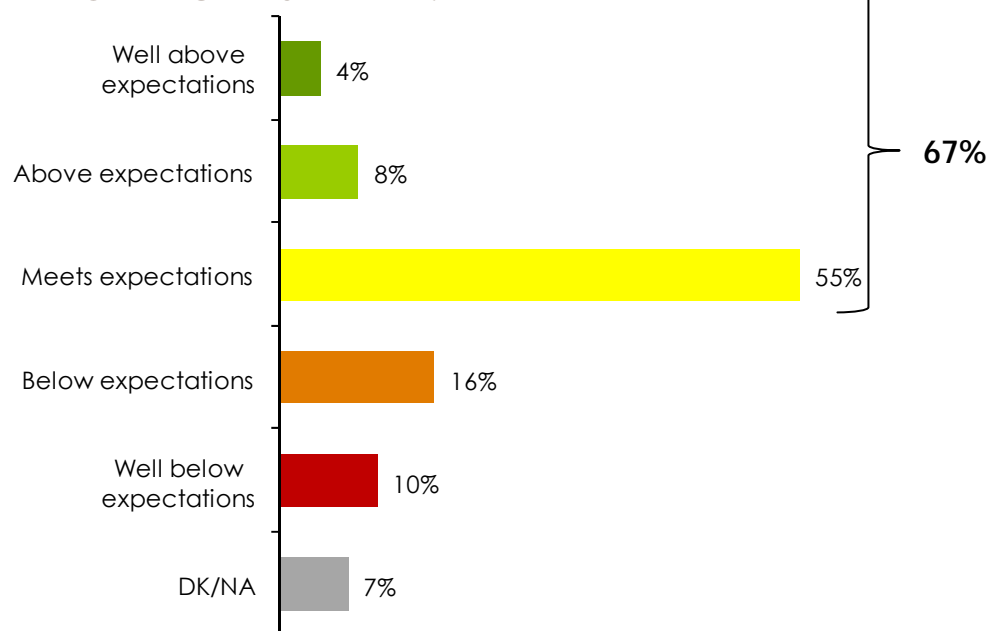
36% of the contracted performances following the last participation in FiraTàrrrega have been made in Catalonia and 32% in the rest of Spain. 33% of them have been performed abroad.



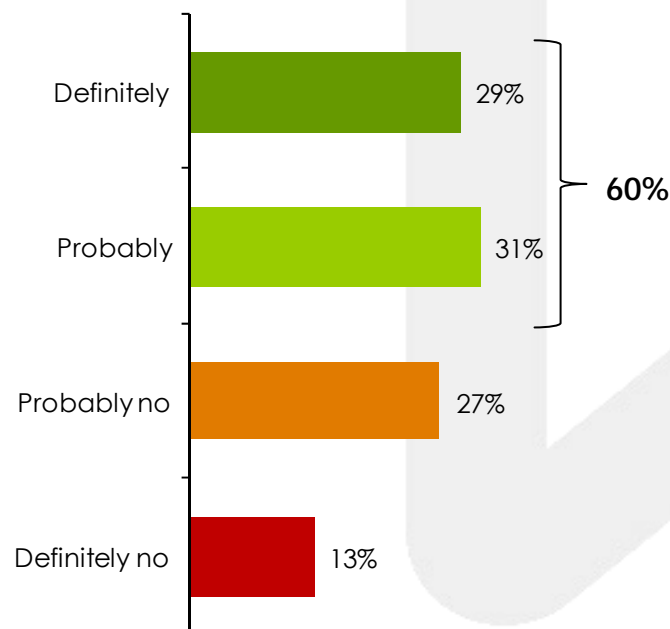
67% of the companies believe that **the fair meets their expectations** or even exceeds them.

Moreover, **60%** will apply again to participate in the 2014 edition.

► DO YOU THINK THAT THE FAIR ACHIEVES ITS GOAL AS A PERFORMING ARTS MARKET?

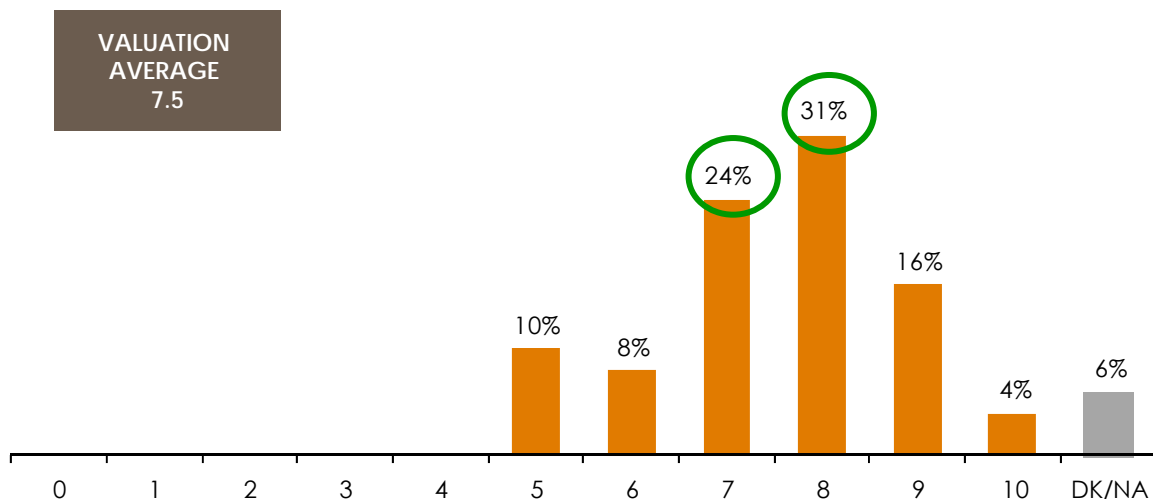


► WILL YOU APPLY AGAIN TO PARTICIPATE IN THE 2014 EDITION?

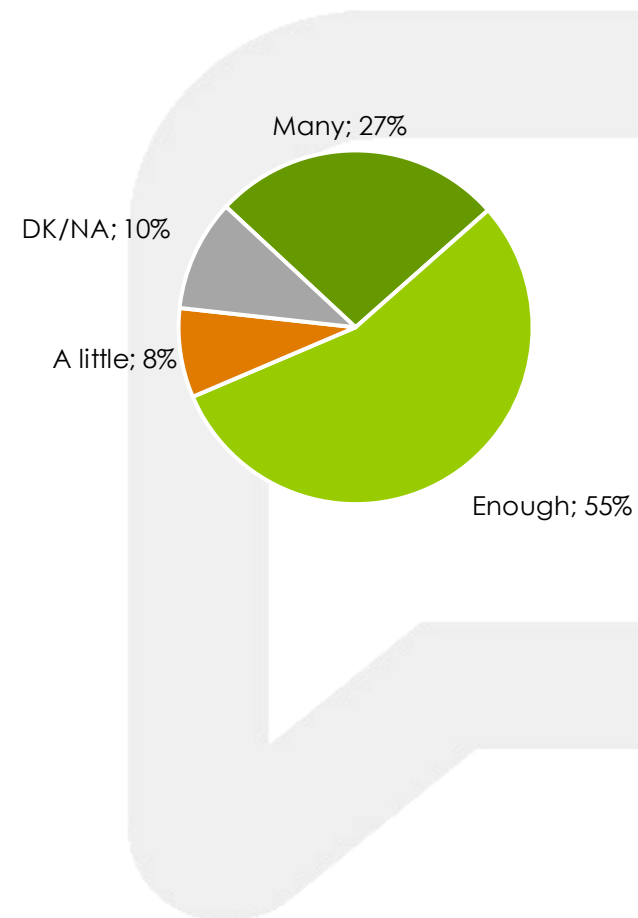




OVERALL RATING OF FIRATÀRREGA



► TO WHAT EXTENT DO YOU ASSOCIATE FIRATÀRREGA WITH A PUBLIC SERVICE CULTURE?



Note: The average ratings did not taken into account the do not knows

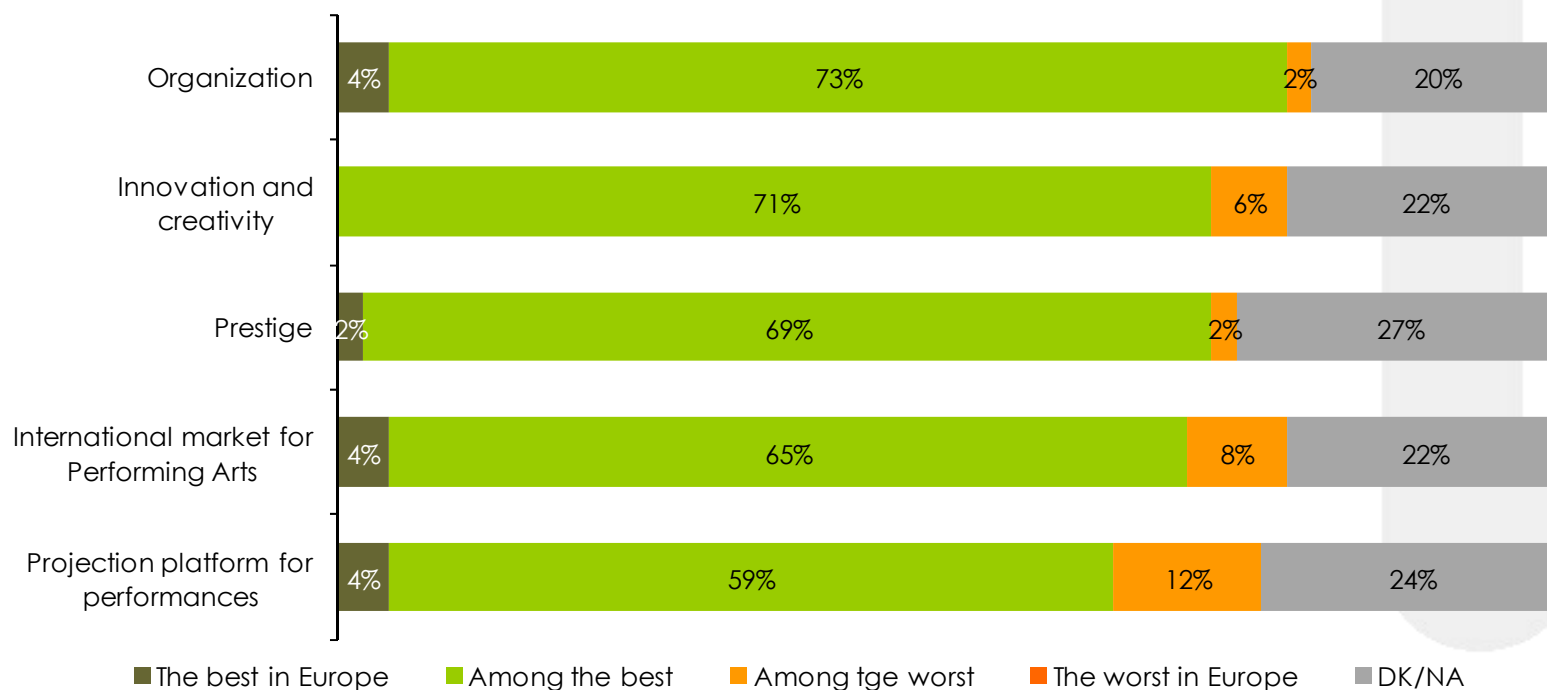
Good overall assessment of the fair, with 51% of scores above 7 and no suspension.

87% of the companies believe FiraTàrrega is a **culture public service**.



As with institutions globally, the companies surveyed place FiraTàrrega among the best in Europe.

Its **organization** is the aspect that stands out the most for FiraTàrrega in relation to other European fairs by the companies surveyed. Secondly, its **innovation** and **creativity** stand out as well as its prestige and that it is among the best international performing arts markets.





- ▶ Estimates are for the 2011 and 2012 editions
 - ▶ For 2011, the contracts undertaken from September 2011 to June 2013 are considered
 - ▶ For 2012, the contracts undertaken from September 2012 to June 2013 are considered
 - ▶ Calculations of the hiring induced are performed by means of the breakdown of each performance contracting by different programmer entities
- ▶ This calculation is valid for the other calculations that are performed:
 - ▶ A) From the total volume of hiring by programming entities
 - ▶ A) From the total volume of hiring by the companies
 - ▶ A) From the hiring performances by programming entities
- ▶ In all the calculations it is needed to infer the overall results from the information provided by the entities.
 - ▶ Therefore, conversion factor are applied
 - ▶ **For 2011: $240/84 = 2.85$**
 - ▶ **For 2012: $221/96 = 2.30$**
- ▶ Notes
 - ▶ Only the entities that have the ability to schedule shows, 72% of the sample, have been taken in account.
 - ▶ In order to maximize the response rate, monitoring was carried out through calls and emails, to complete the maximum amount of information.
 - ▶ In the fieldwork phase a special effort has been made to obtain the most relevant information, for example the companies hired the most.
 - ▶ Several factors for not answering were identified: neglect, contacts were on holiday or abroad, the person contacted did not have the information, the difficulty of not being able to remember the information requested.
 - ▶ The companies, over time, cannot identify whether an entity hired them because they saw them at the fair in Tàrrega.
 - ▶ The information provided by the companies to the extent possible, has been compared with those provided by the organizations.
 - ▶ If specific information is not available (for example, the number of performances or fee:
 - ▶ If possible they have been replaced by the values that occurred indirectly
 - ▶ Or are replaced by the average.



Economic impact induced FiraTàrrega

▶ From the information gathered, the return value is not available and the application of the conversion factor we have to:

	Conversion Factor	Induced economic impact	Average hiring volume by company
From the hiring breakdown of each performance by the programming entities	2.85	€ 2,200,000	€ 36,000 61 companies

ECONOMIC IMPACT INDUCED BY THE 2011 EDITION
TOUR 21 MONTHS
€ 2,200,000

	Conversion Factor	Induced economic impact	Average hiring volume by company
From the hiring breakdown of each performance by the programming entities	2.30	€ 1,205,000	€ 23,500 51 companies

ECONOMIC IMPACT INDUCED BY THE 2012 EDITION
TOUR 9 MONTHS
€ 1,200,000

From here it is clear that the companies participating in the 2011 edition of FiraTàrrega (61 companies) have achieved an average hiring volume of €36,000.

The companies participating in the 2012 edition of FiraTàrrega (51 companies) have achieved an average hiring volume of €23,500.



ESTIMATED IMPACT INDUCED BY FIRATÀRREGA ►

Economic impact simulation generated by FiraTàrrega (2011 and 2012)

This slide presents an exercise to estimate the economic impact generated by FiraTàrrega as a whole, considering both the generation of business in its sector, as well as the impact of the expenditure incurred by participants and the estimate of the entity.

Thus, the estimated economic impact generated by FiraTàrrega is nearly **six million four hundred thousand euros** in the **2011** edition and **five million nine hundred thousand** in the **2012** edition, considering the VAT in all factors.

Considering the amount of public funds received, we can say that the return on investment is more than **7/1** for both the **2011** edition and for the **2012** edition.

These calculations are purely economic, excluding the return involved in the welfare of the people involved or the image of Tàrrega and Catalonia in the European circuit of performing arts.

	2011 Edition	2012 Edition
A. Induced economic impact (industry-wide)	€ 2,627,020 ⁽²⁾	€ 2,698,884 ^{(1) (2)}
B. Participant spending	€ 2,374,000 ⁽³⁾	€ 2,374,000
C. FiraTàrrega consolidated expenditure	€ 1,531,159 ⁽⁴⁾	€ 1,237,035
TOTAL IMPACT (VAT included)	€ 6,532,179	€ 6,309,919
Public contributions	€ 912,825	€ 889,000
RETURN ON INVESTMENT ⁽⁵⁾	7.16/1	7.10/1

- (1) To simulate the economic impact induced by 2012 the proportion was applied to what was obtained in this indicator in the 2009 and 2010 editions. The first year (up to 9 months) the induced impact is 53% of the total while the second year (up to 21 months) is 47%.
- (2) This proportion was applied to calculate the VAT corresponding to hiring in 2011, considering the rise in September 2012.
- (3) For the 2011 edition FiraTàrrega did not conduct any studies of the expenses incurred by participants, so this data is not available. By default we take the same estimate as 2012, meaning that both years had good weather and in no case was there a positive effect from the long weekend due to the Diada holiday.
- (4) The budget for 2011 contains the finalist contribution of the TransAC project from the 2007-2013 Culture Programme.
- (5) Return on Investment: Total impact (generated euros) compared to euros from the government



► Hiring process: motives and barriers

- Most companies and organizations participating in FiraTàrrega had made some contact in the edition they participated in last year. On average the companies have indicated that they have made 9 contracts, while the organizations have made 7.
- The quality of the show is the main reason to hire the companies. Adapting to the needs of these entities is in second place. Further down the list are the genre of spectacle, the knowledge of the company and the innovative nature of it. The fact that the public likes it or other professionals liking it, seems to be unimportant issues at the time of contact with a company.
- The main reason why there has been no agreement is the price, followed by the incompatibility of dates and the fact that the show does not meet the programming needs of the organization. Since contact is made just on the basis of quality, the lack of it does not appear to be a barrier.

► Hiring volume and evolution (Base: organizations that have the capacity to contract)

- 69% of the organizations have hired some of the companies that presented their shows in FiraTàrrega 2011, with an average of nearly 7 performances hired.
- 63% of the organizations that attended the 2012 edition of the show have hired some entertainment companies, with an average of five performances hired.
- The average market price of the shows that have occurred in the 2011 and 2012 editions of the FiraTàrrega is around € 2,800
- 79% of the performances from the companies participating in FiraTàrrega have been hired by public entities.
- 36% of the contracted performances following the last participation in FiraTàrrega have been made in Catalonia and 32% in the rest of Spain. Nearly 33% of them have been performed abroad.
- The estimated economic impact induced by the 2011 edition of FiraTàrrega was € 2.000.0000 (21 months years in length)
- To date, the economic impact induced by the 2012 edition of FiraTàrrega is € 1,200,000 (9 months years in length)



▶ Valuation

- Globally, the organizations made a very positive valuation of FiraTàrrega (7.7 of 10).
- The overall assessment that companies of FiraTàrrega make (7.5), although positive, is slightly lower than the entities.

▶ Expectations

- 67% of companies believe that the fair meets their expectations or even exceed it. This percentage increases to 85% in the case of entities.

▶ Image

- Both the companies consulted as well as the entities located in FiraTàrrega are among the best in Europe.
- The organization is the aspect that stands out the most among the companies of FiraTàrrega in relation to other European fairs. Secondly, its innovation and creativity stand out as well as its prestige and that it is among the best international performing arts markets.
- The organizations consulted also highlighted, in first place, the organization of the fair, secondly, its prestige, then, the fact that it is one of the best platforms to project shows and one of the best international markets for the performing art.
- Both entities as well as companies see FiraTàrrega as a culture public service.