University of South Australia

Tourism and the Rise of the Arts:

Understanding How Arts Festivals Create Value for the South Australian Economy

Industry Report



Photo source: Ruth Rentschler

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Contents

Executive summary 4
Introduction: 10
Background 13
Collaboration: 15
Glocalism: 16
Financial Sustainability: 16
Tourism Marketing: 17
Knowledge Sharing: 17
Literature Review 19
Collaboration 19
Glocalism 20
Financial Sustainability 22
Tourism Marketing 23
Knowledge Sharing 23
Approach 25
Case studies: 25
Data Collection & Analysis: 27
Findings 30
Collaboration 30
Knowledge Sharing 35
Financial Sustainability 41
Tourism Marketing 46
Glocalism 52
Conclusions and Recommendations 60
References 64

List of Figures and Tables

Figure 1 – Relevant strategic themes identified in South Australia's Arts and Tourism Plans 15
Figure 2 – South Australian Arts Festivals Ecosystem 18
Figure 3 – Key findings around collaboration theme 57
Figure 4 – Types of Collaborations within Arts Festivals Ecosystem 59
Table 1: Study stages and processes 26
Table 2: Study participants' background 28

Executive summary

ENTREPRENEURIAL DECISIONS WERE MADE TO FUND 'MADE IN ADELAIDE', ENABLING ARTISTS TO TRAVEL TO EDINBURGH TO SCOUT, NETWORK, COLLABORATE. THIS REALLY INVESTS IN ARTISTS' PROFESSIONAL DEVELOPMENT, SO THAT THEY CAN PUSH THE BOUNDARIES THROUGH PERFORMANCE IN ARTS FESTIVALS. (ELEANOR, ARTIST)

The significant rise of arts festivals in South Australia has been associated with a growing interest in boosting tourism while creating value for the arts industry. South Australia invests heavily in its arts festivals, for example Adelaide Festival ($9m), compared to Sydney Festival ($5m) and Perth Festival ($7m), recognising their tourism potential (Wake 2019). Nonetheless, there remain both opportunities and challenges for arts festivals in South Australia. For example, in the arts tourism report by the Australia Council for the Arts (2020), Adelaide only rates ninth out of ten destinations—behind Melbourne, Sydney, Brisbane, Canberra, Hobart and north coast NSW—for overnight cultural tourism stopovers, indicating the opportunity for development using arts festivals as the mechanism. Yet cultural tourists travel further, stay longer and spend more than other tourists, with more cultural tourists attending the arts than wineries and sport, contributing $14.3 billion or 20% of the overnight domestic tourism spend. Furthermore, there has been a 15% increase in overnight trips to SA since 2014, with 12% of those trips including an arts activity (Australia Council for the Arts 2020), demonstrating its growth potential. Challenges include arts festivals and tourism being two of the industries worst affected by the COVID-19 pandemic, which is likely to see a radical shift in arts festival and tourism activity. Thus, the data for this industry report are relevant for government, arts festivals and tourism in a post-COVID-19 world, where redesigned strategies and structures, modes of delivery, health and well-being of artists, audiences and festival organisers have become paramount to navigating a 'new normal.'

Hence, the growth of arts festivals as a key industry for South Australia, along with their opportunities and challenges, has driven the need for research to examine how government policy could influence the evolution of such festivals by collaboration to support glocalism,

financial sustainability, knowledge sharing and tourism marketing. Arts festivals in the post-COVID-19 world will need to be 'smart' and 'slow', engaging with audiences to build a relationship rather than seeking volume, with an increasing focus on health, well-being and digital streaming, requiring a rethink of arts festival strategy.

The purpose of this report is to inform government and industry stakeholders, in a disruptive policy environment, as well as advance theory, by:

i. providing a framework for understanding the key drivers of value creation for arts festivals in South Australia;
ii. understanding how government policy influences the evolution of arts festivals and tourism by creating connections and collaborations between individuals, organisations and communities;
iii. examining how arts festivals in South Australia play a role in the development of people and place;
iv. identifying the capabilities essential to the glocalism of South Australian arts festivals and their participants in a post-COVID-19 world that will rely on 'smart' and 'slow' tourism and digital streaming to engage audiences in new ways.

Using a mixed methods approach, comprising case studies, interviews, observations and content analysis, this report examined the interconnections between arts festivals, collaboration, value creation and tourism. Themes that emerged from the data were developed and analysed, providing the basis for the key insights outlined in the findings and the recommendations that were drawn from them. Hence, there are four key findings:

1. There is a need to promote greater collaboration between key stakeholders which can further arts festival glocalism, financial sustainability, knowledge sharing and tourism marketing.
2. There is a need to expand arts festival organisers' approach from an operational focus to a strategic perspective, especially urgent in a post-COVID-19 world, through a renewed focus on people and place rather than internationalism, supported by the

recruitment of appropriately skilled human capital in order to stream more activities while achieving financial sustainability.

3. There is a need to develop consistent research and data management within the industry in order to promote the value of arts festivals to stakeholders and to enable knowledge sharing and cross-sector collaboration.
4. There is a need to build bridges between arts festival organisers and the general public to foster and develop an eco-system that includes both face-to-face and streamed services in order for arts festivals to become financially sustainable in a disruptive environment of rapid and unexpected change.

Key findings in this report show that the three top obstacles that restrict growth in audiences for arts festivals in South Australia are:

- Need for resources and skills: Although stretched financially, teams of sufficient size, and contributing skills and time to the development of arts festivals, are crucial. Most arts festival organisers are operationally occupied, with very few able to take a wider strategic view of their ecosystem. Adequate team sizes with appropriate skill sets are required that could contribute skills and time across multiple tasks in the real and digital worlds. Without them, arts festival organisers are limited from gathering a wider strategic perspective.
- Need for sophisticated data management: One of the limitations of poor resources is the need for consistent data capture and reporting. If arts festival organisers have to fight for their share of the tourism marketing pie or gain financial sustainability through a variety of funding sources, further efforts need to be placed on research and data management within the context of South Australian arts festivals.
- Need for greater knowledge sharing: Most arts festival organisers and artists need skills and knowledge to enable them to be entrepreneurial, operating in the digital as well as real-world environments, thus achieving financial sustainability. The need for digital skills, such as streaming ability, has become urgent through the COVID-19 pandemic. The scope of the government's role requires a shift from a predominantly funding-focused to relationship-building (including education and training; and support in times of crisis) through wider collaboration, thus supporting arts festival

organisers in how to achieve financial sustainability in uncertain times. Government and arts festival organisers play a joint role in educating the wider community on the economic and social benefits of the arts, enhancing the potential for more philanthropy from businesses and community members, while providing opportunities for artist growth and development. Arts festival organisers and government can play an active role in collaborating for better artist health and well-being, training and facilitating networking opportunities for local artists to equip them with an entrepreneurial mindset to develop their careers.

These obstacles present clear challenges and opportunities for the arts sector in achieving long-term growth as the future is uncertain, putting pressure on the ability for financial sustainability. But also, the obstacles present a challenge for the tourism sector, while travellers continue to gravitate to the arts online through digital streaming (Keen 2020a and b) as a means to understand the essence of the places they visit. Some tourism boards have tried to leverage their digital channels, as Tourism Australia has done with the launch of the "Live from Aus" campaign in May 2020, attempting to engage and excite audiences with uniquely Australian travel experiences. However, the mechanisms of charging for digital streaming services remains problematic with much content being provided free of charge.

A successful tourism marketing effort relies on collaboration between arts festival organisers, arts agencies and tourism agencies. Festivals Adelaide is critical to achieving greater collaboration between key stakeholders (e.g., arts agencies; tourism agencies; artists; producers; and the public), due to its linkages with each major arts festival and its reputation for brokering break-through deals that are game-changers. Festivals Adelaide needs to leverage the digital world in its communications with stakeholders. Using its network of arts festival directors, Festivals Adelaide then could provide creative communication to the public in order to promote its mission, vision and benefits to the state of South Australia.

Tensions between SATC and arts festival organisers are evident when SATC's official social media channels, such as Twitter (@South Australian Tourism Commission), do not publicise the opening of the 60th year of the Adelaide Fringe or the Adelaide Festival. SATC instead

highlights sport events, such as ISPS Handa Women's Australian Open and the build up to the ICC T20 World Cup. If arts festivals are to become key associations for South Australia's tourism image, they will need to be better integrated within the communication platforms led by SATC and supporting tourism agents. Indeed, the Australia Council for the Arts (2020) reports that while daytrips and overnight trips for interstate arts tourism has consistently grown across Australia, South Australia performs slightly below the national average, with Victoria and New South Wales being leading performers. This suggests that the potential to market arts tourism across Australia exists, however, other states lead with a more integrated arts and tourism image when compared to South Australia. Hence, there are four key recommendations, developed from the findings:

Recommendation 1

1. Expanding the role of Festivals Adelaide: Enable Festivals Adelaide to facilitate greater collaboration between key stakeholders, especially, the two government agencies, Arts South Australia and South Australian Tourism. Commission Festivals Adelaide to provide a stronger communication with the general public, especially digitally.

The post-COVID-19 world could have long-lasting effects on the consumption patterns of tourists, leading to greater popularity for digital streaming of arts festival activities, high-end tourism, as well as a focus on health and well-being. As many (but not all) arts festivals pitch to the high-end tourism market, tourism marketing could better leverage arts festivals.

There are two key perspectives in relation to it. First, arts festivals can be seen as a component of the broader tourism offering of South Australia. There is not yet a strong direct relationship between arts festival organisers and tourism, but as arts festivals become more ambient components for tourists rather than the primary motive to travel, this will change. Second, arts festivals could become primary motives for targeted interstate and international tourists. This is possible when the arts festival offers an exclusive experience that is not available in other markets. The Mozart opera from Berlin at the 2020 Adelaide Festival is one example that drives interstate tourism, while the Adelaide Festival brand drives tourism from Asian source markets. While some arts festivals, such as the Fringe, can rely on their overall appeal as the second largest Fringe Festival globally, others may need to

explore more exclusive artists and programming that drive the attention of tourists and national or international media.

While the potential tourism impact and image development that can be realised through collaboration is evident, the role of arts festival organisers and related stakeholders in supporting to boost career opportunities for local artists is also noted. With COVID-19 decimating the artists' careers, at least in the short-term, it is important not to limit arts festivals to a tourism perspective, but rather to review their value, so that they can provide professional development opportunities for other stakeholders (e.g., artists) as well.

Recommendation 2

2. Expanding the role of state government: While promoting a more self-sustaining approach to arts festival organisers, the state government also needs to expand its scope in guiding arts festival organisers as they operate on a knife edge, and need guidance through a period of financial transition, collaborating widely with government and non-government stakeholders, supporting skills development for organisers, whilst communicating the value of the arts sector to the wider community and encouraging a culture of philanthropy.

Recommendation 3

3. Expanding the role of arts festival organisers: to justify their own "social licenses" to operate within society, arts festival organisers can communicate the value of the arts sector to the wider community, also encouraging a culture of philanthropy. Arts festival directors and their boards owe it to the local artists to ensure their arts festivals create a framework of health and well-being, by providing adequate training, skills development and opportunities to allow artists to be entrepreneurial and to promote and commercialise their artistic offerings through digital platforms in a post-COVID-19 world.

Recommendation 4

4. Expanding the role of the state tourism agency: There is a need to actively diversify the state's tourism marketing strategy by including the arts, not merely as an ambient activity, but recognising some of the major arts festivals as key brand associations.

Introduction:

> *I was Adelaide born and bred, so it's in my blood. And I've watched this city go from being a very, very boring place, I cannot tell you how dull Adelaide was in the 1960s. It was a city that just lived in the post-war economic miracle and did all of the things that Australia always does, which is dig things up and send them somewhere else. (Richard, Major Festival CEO)*

Arts festivals are important if not 'unwieldy beasts' (Wagner 2008) that operate in a variety of ways in the creative ecosystem. With travel patterns likely to change in a post-COVID-19 world, where engagement may be preferred to mass tourism; and small groups or independent travel may be preferred over large group travel (Australia Council for the Arts 2020), there will not only be lifestyle changes but also arts festival offering changes. Arts festivals can be small and locally-focused or large, diverse and bring in international visitors in large numbers. Many arts festivals have focused on the joy of the immersive, large-crowd experience. This approach to a consumer experience may now need to be re-visited. Some arts festivals are traditional and heritage focused (e.g., South Australian History Festival) while others are contemporary and innovative (e.g., Tarnanthi), while still others are high end (e.g., Adelaide Festival) compared to those that focus on the everyday (e.g., South Australian Living Artists' Festival commonly called SALA and ZestFest festival for the ageing). Still other arts festivals are clustered around one art form or theme (e.g., visual arts; performing arts; history). Some festivals are curated (e.g., Adelaide Festival; WOMADelaide) while others are not curated and open to everyone (e.g., SALA and Fringe Festival). Despite these challenges and differences, arts festivals are deemed to be important to the South Australian economy, with 2017 data suggesting that 4.5 million people attended South Australian festivals of which 73,113 were interstate and international visitors. Visitor expenditure during their stay was estimated at $81.3 million, delivering a return of investment of $4.7 earned on every $1 spent on attracting visitors to South Australian arts festivals (Burgan, 2018).

Many of the arts festivals are centred around Adelaide (although this is not always the case as some have a regional and state-wide focus). Adelaide is a small city of 1.3 million people. It has been designated the UNESCO City of Music since 2015 and is called the 'festival state' due to its 11 key arts festivals in the city. Being a globally recognised member of the UNESCO Creative Cities Network, arts and cultural activities include 57 live music venues in the city (27% of all South Australian venues); a 2% growth in live music performances; and the provision of $1.78 million to support a range of live music performances. With South Australia transitioning from a manufacturing state to an experience-based economy, and with the South Australian creative sector now also looking for new opportunities to engage with arts festivals, such as digitally, linking arts festivals, tourism and digital streaming, arts festivals form an important nucleus for that transition. Tourism has become integral to the redevelopment plans for the city and the state, but the tourism potential of arts festivals remains underdeveloped.

However, despite arts festivals importance, we know little about how they create value and, in particular, the process through which they affect the development of their participants, new business formation and job growth in the creative industries, and the South Australian tourism economy in general. Thus, a more specific understanding of the underlying process through which value is created by arts festivals is needed if we are to better achieve desirable outcomes (e.g., increased visitors and tourism; job creation; growth and glocalism in the South Australian creative industries; artist development). This report explores major factors that facilitate or inhibit the growth and development of tourism and creative industries in South Australia by undertaking in-depth case studies of arts events and festivals operating in South Australia. Adelaide, the capital of South Australia, is a clean, green city, well-planned with wide streets, surrounded by a belt of green parklands, then reserves, hills, vineyards and beaches. As such, it is an ideal location for arts festivals to blossom in physically located spaces.

This report is important to advancing the arts festival ecology because although considerable research has been undertaken in an attempt to understand how organisations develop and evolve in an uncertain world, especially in the fields of economics and management (for reviews see Crossan & Apaydin, 2010; Priem, Li & Carr, 2012). Prior

research is largely inconclusive and offers little guidance to the process of value creation in the unique context of arts festivals, made urgent by the disruptive changes to the world we know by an international pandemic. For example, the economic worldview (e.g., development economics, industrial organisation) primarily investigates the development of organisations using aggregate economy level data and makes inferences about the implications of various government policies and market forces, thus offering little practical guidance to organisations and their managers in an environment where policy is changing so rapidly that it is hard to keep up but the focus needs to be on people as well as ecosystems and organisations.

Moreover, although management scholars explore both internal and external factors in an organisation's environment and how these may influence their development, the literature is fragmented, empirically inconclusive, and not generalisable to the context of arts festivals. Furthermore, the pandemic has shocked the world that is not ready for it and is without the research on it to take arts festivals forward. Thus, adopting a case study methodology is beneficial to improving understanding of the complex interactions in value creation that occur between arts festival organisers and organisations and governments (e.g., federal; state; local), participants (e.g., policy makers in arts, health and education; artists), and other stakeholders (e.g., consumers) (Daft & Weick, 1984; Hult, Ketchen & Slater, 2004; Mackey & Barney, 2013).

Background

ADELAIDE WAS A CULTURAL DESERT. IT WAS VERY WHITE, VERY BLAND. IT IS MIRACULOUS THAT SOMETHIJNG LIKE THE ADELAIDE FESTIVAL GOT PLANTED IN THAT ENVIORNMENT AND THAT IS SUCCEEDED. (RICHARD, MAJOR ARTS FESTIVAL CEO)

Tourism has become integral to the development or redevelopment plans of cities and regions (Burbank, Andranovich & Heying, 2002), with arts festivals becoming a central plank in tourism in order to develop them. Hence, arts festivals are multiplying across the world at rates faster than other arts and cultural initiatives (Pejovic, 2009). Thus, cities and regions aim to cultivate a 'differential advantage' (Turok, 2009) to distinguish themselves from other urban and regional centres. Urban distinctiveness (ABC 2020; Markusen, 2004; Markusen & Schrock, 2006) has been the focus of many city governments in recent decades with terms such as 'vibrant', 'creative', and 'smart' attached to countless urban and regional strategies.

The transition from agriculture and manufacturing to service economies, with arts, culture and tourism as a means of economic growth has signified a shift in (i) city government strategy (Scott, 1997), (ii) infrastructure planning and facilities development, as well as (iii) from an industrial to a service economy (Quinn, 2005). Consumption of the arts, through arts festivals has been projected to bring new wealth to local and regional economies relatively quickly, and economic impact is most often cited in support of urban arts and cultural policies. However, in a world consumed by a global pandemic, rethinking arts festivals and tourism is necessary.

With the onset of globalisation and rapid social and economic transformation occurring worldwide, city governments have focused on strategies generating economic growth, enhancing quality of life, increasing recognition, and attracting and retaining creative talent through arts festivals. A common response of cities to the new challenges that they are confronted by has been to set up policies that focus on leisure, entertainment, sport, or arts and culture (Eisinger, 2000; Teske & Sur, 1991). More recently, well-being has been

recognised as an important aspect to supporting arts festival organisers, artists and stakeholders in the arts (e.g., The Arts Wellbeing Collective, 2019). Although the Arts Wellbeing Collective was established for another purpose, it is relevant to the needs of arts festivals and tourism examined in this report.

Competition between cities is motivated by developing a distinctive city image, aimed at increasing consumption by residents and a growing number of tourists. However, competition, through urban competitiveness, especially among small cities, is not necessarily a promising direction (Eisinger, 2000; Grodach & Loukaitou-Sideris, 2007; Quinn, 2010). Arts festivals, real or virtual, can serve a function of building collaborative but temporary clustering for creative cities like Adelaide, which support glocalism, internationalisation and knowledge-sharing (de Burgh-Woodman, 2014; Etemad & Motaghi, 2018; Ferdinand & Williams, 2013) as part of the tourism marketing mix. However, at the centre of arts festivals is the creativity sparked by the arts performances, exhibitions, installations and experiences that artists create. Artists create something out of nothing, engaging their audiences through sense of sight, sound, smell, touch and taste. Artists often finance their work through subsidiary occupations related to their creative work (Lee, Fraser & Fillis, 2018), and are seen to pursue their career as a calling or vocation rather than a job. Nonetheless, their creative work is uncertain, precarious and often contract or casual in nature. Arts festivals provide significant opportunities and also challenges for artists as much as for their arts leaders, such as executives and board directors (Rentschler, 2002). Given the lack of long−term job security, and an uncertain world, it is imperative that artists achieve emotional well-being by participation in arts festivals, in order to nurture their creative futures as well as the creative futures of the arts festivals (Fillis & Rentschler, 2010).

Thus, arts festivals can support their host cities in various ways, such as by:

- creating value as a part of the underlying arts and cultural infrastructure
- boosting their role as an immediate tourism drawcard
- building capacity for sponsors and corporates to leverage business outcomes
- increasing implications for long-term tourism and business impacts
- developing rich, deep and engaging experiences for local communities
- building digital as well as physical skills to support artist development
- boosting the reputation of the state

Two key policy documents form the foundation for examining arts festivals, tourism and glocalism in South Australia. First, the South Australian state government commissioned independent consultants to undertake a project to develop an Arts and Culture Plan South Australia 2019-2024. The relevant recommendations from the Arts and Culture Plan entail three key objectives relating to (i) Collaboration; (ii) Glocalism; and (iii) Financial Sustainability (Department of the Premier and Cabinet, 2020). Second, the South Australian Tourism Commission (SATC) developed its new strategic plan in 2019. Although SATC sets six strategic priorities in their plan, this industry report references these under three broader categories: (i) Collaboration; (ii) Tourism Marketing (external) and (iii) Knowledge Sharing (internal). Figure 1 illustrates the five categories identified in the strategy documents, with Collaboration being central as a common category between both tourism and arts and culture plan.



Figure 1 – Relevant strategic themes

Collaboration:

Collaboration sees co-operative, formalised and deliberative decision-making for the greater good, creating a paradigm shift in public policy. The Arts and Culture Plan 2019 sees collaboration as how the arts develops and enhances art form innovation. Nonetheless, there is a common theme between the Arts SA Arts and Culture Plan 2019 and SATC plans,

where collaboration, stresses the importance of intra-agency collaboration across government departments; between arts and cultural organisations, cross-art forms and practitioners; and as a means of optimising resources. Collaboration can be real or virtual, or a mix of both. Furthermore, it encourages a whole of government approach to developing arts and culture targets across all government agencies as a means of achieving social outcomes; and capturing the value of arts and culture to build on existing work undertaken in this area.

When greater collaboration is achieved, it enables the following: glocalism; financial sustainability; tourism marketing effectiveness; and knowledge sharing. Each of these matters is now discussed.

Glocalism:

Glocalism focuses on the balance between the needs of the global market and the distinctiveness of the local and domestic communities, with international engagement addressing the need for increased export of South Australian arts and creative industries; local and domestic engagement recognising the value of home grown talent thus endorsing South Australian arts and culture; and a balance between the two boosting the State's profile as an attractive place to live, visit and/or invest. The global marketplace for experiences has been hard hit by COVID-19, with an uncertain start date for physical festivals, international travel, modes of travel, personal safety and well-being, requiring a shift in focus for arts festivals and tourism. In line with the state's tourism approach, restarting with promoting local and regional travel, with expectations to gradually open interstate and neighbouring international travel (such as that being explored with New Zealand), arts festivals may need consider a similar approach for promoting SA artists.

Financial Sustainability:

Financial sustainability entails building funds from domains other than government e.g. philanthropy and sponsorship; and increased ticket sales and merchandising. It addresses the need to diversify current funding available to arts and culture. In a world dominated by a global pandemic, financial sustainability has been hard hit for all arts organisations and

independent operators such as suppliers and artists. It may take some time for people to overcome their fear and panic that the pandemic induced, and regaining their confidence to attend large, crowded events. 'Smart' tourism will facilitate crowd management, enhancing the arts festival experience and managing physical distancing.

Tourism Marketing:

With festivals frequently cited for their tourism impact, tourism marketing stresses the importance of formulating an adequate marketing strategy for tourism in general, and ensuring arts and festivals fit within the marketing strategy, in terms of positioning and brand identity. Well-being packages for consumers who want to experience arts festival will be a necessary part of 'smart' tourism marketing.

Knowledge Sharing:

While collaboration across government agencies is critical, ensuring knowledge is shared with wider stakeholder groups within the arts festivals' ecosystem is also important. This includes, educating the wider hosting community of the benefits of the arts, arts festival and tourism sectors, and how to support and leverage activities from these sectors. It also includes sharing new learnings on 'smart' tourism for arts festivals, with the need for 'slow' ways of operating in a post-COVID-19 world.

As collaboration is identified as a common theme in tourism and arts plans, the plans were also reviewed to identify key stakeholder groups within the arts festival ecosystem. Figure 2 illustrates the stakeholders within the ecosystem. The complex relationships among these stakeholders are reported within the findings of this study, from arts to tourism, health to accommodation.

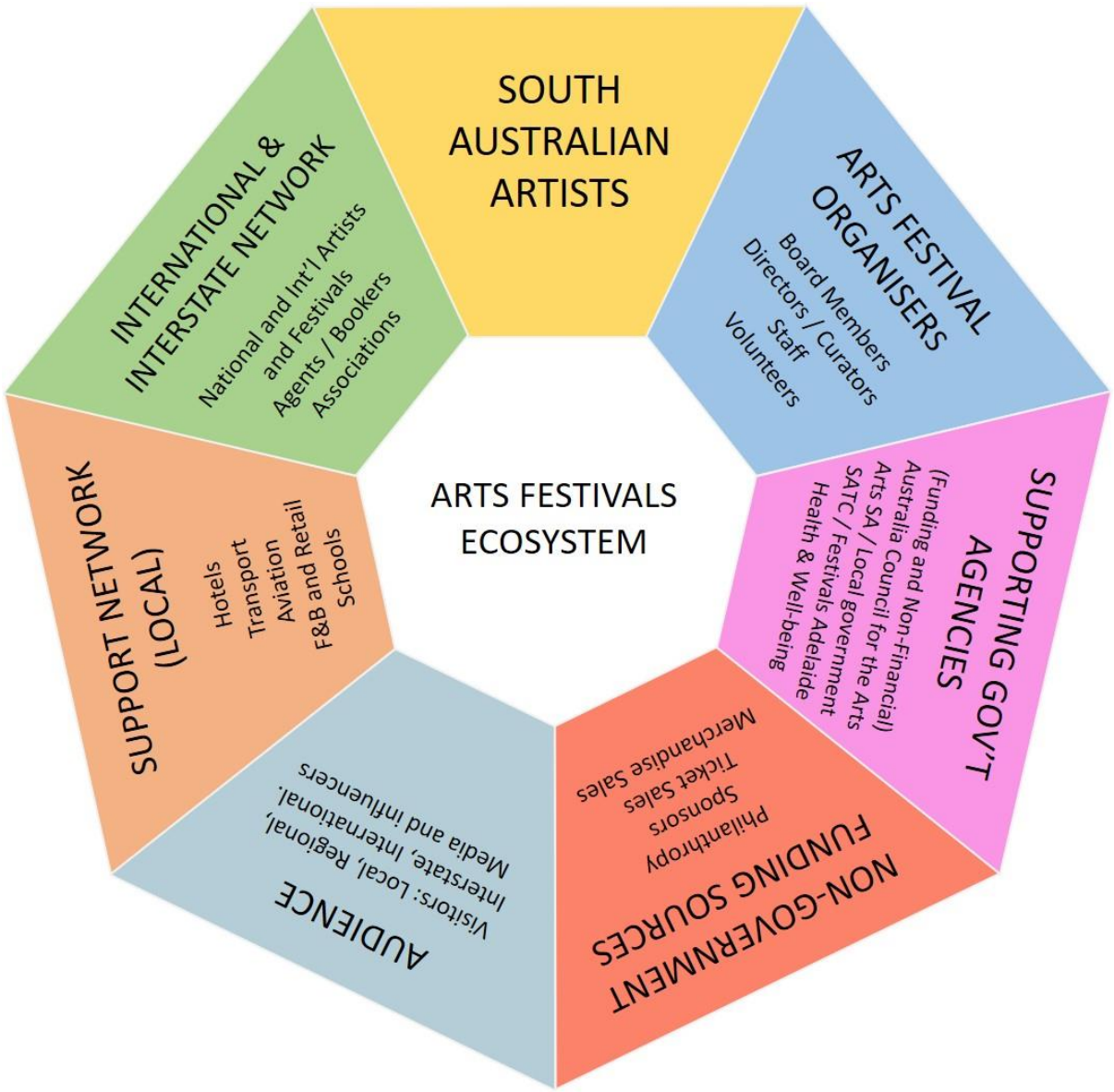

Figure 2 – South Australian Arts Festivals Ecosystem

Literature Review

The Adelaide Fringe is the second biggest fringe festivals in the world. Lots of people who will work in the arts industry will know from doing the Edinburgh Fringe that Adelaide is a big deal. It's a great place to hone your work and you'll maybe create a show and you'll tour it around different festivals in Australia or bring it to Edinburgh. Adelaide is a big part of that. Outside of the arts industry, not many people know about Adelaide. (Gregory, an international journalist)

Arts tourism has been identified by the Australia Council for the Arts (2020) as a consistent growth sector for interstate and intrastate tourism, exceeding domestic tourist numbers recorded for organised sport, amusement parks and wineries. However, it has collapsed in 2020 due to the COVID-19 outbreak and is unlikely to look the same after the pandemic as the world struggles to come to terms with a new reality. With the potential tourism impact the arts sector holds for Australian states and territories, the literature review outlines key concepts that support maximising the economic and social impacts. Literature from five key sources is analysed, namely: collaboration; glocalism; financial sustainability; tourism marketing; and knowledge sharing in relation to arts festivals and tourism.

The next section provides a brief overview of each of the five literatures that underpin this study.

Collaboration

Collaboration is defined in this study as a governing arrangement where various government agencies engage with non-government stakeholders in collaborative decision-making that is formal, deliberative and for the greater good, changing how public policy, programs and assets are managed (Fanelli, Donelli, Zangradi & Mozzoni, 2020). Scott (2015, p. 537) explains that collaboration enhances cooperation and fosters a belief in change among stakeholders (Leach et al., 2013; Lubell, 2004), generate funds and support for alternative policy measures when problems are too diffuse or difficult to address via regulation (Margerum, 2011), and increase the implementation success of policies and programs (Agranoff & McGuire, 2003). A process framework for collaboration suggests that collaboration occurs over time as organisations interact formally and informally through

repetitive sequences of negotiation, development of commitments, and execution of those commitments (Thomson & Perry, 2006).

Collaboration is becoming an imperative for arts and festival managers. For example, Adelaide Festival has partnered with Aix-en-Provence in France. Due to the COVID-19 global outbreak, collaboration now entails close partnering with the health departments at various levels of government. Devolution, rapid technological change, an unprecedented global health pandemic, scarce resources, and rising organisational interdependencies are driving increasing levels of collaboration (Thomson & Perry, 2006). Other benefits attributed to collaboration include access to information, implementation support, and reduced conflict (Gigone & Hastie, 1993; Hill & Lynn, 2003). Within the arts festivals' ecosystem, Andersson and Getz (2007) highlight that arts festival organisers collaborate with stakeholders through financial and non-financial relationships. The financial relationship is covered within the literature review on "Financial Sustainability" while non-financial relations include Knowledge Sharing, Tourism Marketing and Glocalism.

Glocalism

Glocalism is defined as the meeting of the global and local, with the word being derived from the co-presence of universalising and particularising concepts, relevant to arts festival conceptualisation. Of course, the international environment has completely transformed since December 2019 due to the global pandemic, COVID-19. Thus, suddenly, glocalism has hastened the replacement of internationalism in arts festivals. For example, arts festivals such as Sydney Festival are planning all-Australian artists' festivals in 2021, with a focus on Australian artists as well as Aboriginal artists (see for e.g., Baker, 2020). There are several reasons for this shift. First, Australian artists need work and support after being the sector of the industry hardest hit by the global pandemic, COVID-19, with only 47% of Australian arts businesses remaining trading, affecting 50,000 artist and 600,000 workers in the creative industries (Anatolitis, 2020). Second, it is uncertain whether international travel will be allowed at the beginning of 2021, when the Sydney Festival takes place. Third, there may be a second wave of the pandemic, causing additional set-backs and creating uncertainty in the creative industry. Finally, the global pandemic has seen a rise in collaboration (discussed above) with a focus on community expression of human passions and emotions at the

crossroads between performing arts, theatre, comedy, music and visual arts, to name a few (Fanelli et al., 2020).

To seek to position the Adelaide Fringe Festival against the Edinburgh Fringe in such a disruptive environment may no longer hold much relevance as festivals will need to rethink their international strategies. Both Fringe festivals are held in a comparable, small cities. They had record-breaking box office takings in 2019. Edinburgh International Festival's sales topped £4 m and audiences surpassed 420,000. Over 3 million tickets had been issued for Fringe shows, an increase of almost 6% on 2018 from 3,841 shows in 323 venues. Edinburgh's festivals each year attract over 4 million people, comparable to the Olympics and total number of attendees to all South Australian Festivals (Convention Edinburgh, 2020).

However, in 2020, the global tourism industry expects a loss of $US22 billion due to the cessation of tourism world-wide due to the global pandemic, COVID-19 (Bhaya, 2020). This will entail a radical shift in tourist behaviour and will require an equally radical shift in arts festival, government tourism agencies and tourism operator behaviour. Large group travel may be replaced by high-end, small or independent travel, providing an opportunity for arts festivals which often target high-end festival-goers.

We argue that in the context of globalisation, market shifts, and increased global competition for international audiences (Fillis & Lee, 2011), cultural events must change and deepen their international engagement in new ways. Internationalisation may include more streamed visibility of arts festival activities but also broadened opportunities for Australian domestic collaboration, programming, audience engagement and artist development. More significantly, arts festivals are a platform to nurture digital and social interaction, providing "the heart to a community as their celebratory nature provides residents with conditions of freedom and connectedness rather than a fixation on the forms and structures of the community" (Derrett, 2003, p. 51). The liminoid spaces that arts festivals can create hold the potential to be further leveraged for social and economic outcomes (O'Brien and Chalip, 2007) for development of local artists.

Financial Sustainability

Sustainability is broadly defined by its environmental, social and economic outcomes on arts festivals. Academic review on festivals' impact on the environment, society and the economy continue to grow (Andersson & Lundberg, 2013; Jago, Deery, Fredline & Raybould, 2005; Getz, 2009). This report, however, predominantly focuses on economic sustainability which will ensure the long-term viability of South Australian arts festivals, noting the disruptive challenges brought about by COVID-19.

Financial Sustainability means the ability of an organisation to survive by extracting revenues to secure the future financial viability of the organisation (Found & Rich, 2006). Economic sustainability is more complex than it may seem initially. It has three key components. First, there is the financial aspect, which requires South Australian arts festivals to adopt a stronger orientation towards external supporters; expand dependence on resources other than government; and develop a network of benefactors and committed stakeholders (Getz & Anderson, 2008, P. 15). Therefore, the ability of South Australian arts festivals to gain and utilise efficiently alternate resources such as sponsors, philanthropy, increased ticket sales and merchandising is vital in order to survive and flourish (Getz, 2002, p. 213). Philanthropy, in particular, is emerging as a major source of funding, as governments look at tapping into emotions and feelings of patriotism in a community to drive philanthropic funding into sports (The Boston Consulting Group, 2017). This is not a new phenomenon within the arts, where the act of philanthropy donations towards arts and culture development as an act of patriotism dates back to the early nineteenth century (Hites, 2019).

The second key component of economic sustainability is leadership and managerial confidence and competence, which underlines the need for South Australian arts festivals managers to be skilled and competent in developing relationships that result in generating resources and support (Andersson & Getz, 2007). Third, there is the issue of adaptability, which has become urgent in a new world order and likely a deep recession. South Australian arts festivals are sustained and flourish by constant adjustment in a fluctuating, disruptive and uncertain environment. Adaptability enhances the competitiveness of arts festivals and generates value for the short-term and long-term.

Considering the fact that turbulence has increased to the point of crisis, adaptability has become crucial (Bhaya, 2020; Reeves et al., 2012, p. 19).

Tourism Marketing

Tourism marketing is defined as the strategy that is undertaken in order to position arts festivals vis-à-vis other arts festivals and events to attract visitors to a specific location. The relationship between arts festivals and tourism has been well documented. Quinn (2009) contends that while arts festivals may originate from themes such as celebrating creativity or artist development; these festivals, if sustained, almost always develop tourist profiles. Tourism and arts, however, emerge from two different domains, while a more strategic collaboration has been advised (Tighe, 1986). Major arts festivals do, however, cite tourism impact as a key benefit when reporting success to government and other stakeholders. This is also because of the emphasis on economic returns by many stakeholders, as opposed to social impact, which is usually more difficult to measure in the context of festivals (Schlenker, Edwards & Sheridan, 2005).

The arts play a major role in communicating the essence of a city to tourists (Australia Council for the Arts, 2020). Moreover, arts festivals hold significant potential for tourism marketing, as tourism planners look to using arts as a means of further diversifying destination tourism offerings (Prentice & Andersen, 2003). However, in a changed world where health and well-being will be major concerns for festival-goers, domestic tourism growth will potentially be a key for some time over international growth.

Aside from the place-making ability that arts festivals possess (Quinn, 2006), arts festivals can be leveraged to encourage tourists to spend more time and money within the local economy (O'Brien & Chalip, 2007). With tourism boards predominantly focused on driving more tourist numbers and generating tourist spend in the economy, arts festivals fill a notable cultural storytelling role in a destination's marketing.

Knowledge Sharing

Knowledge sharing is defined as a framework of non-hierarchical relationships for the exchanging of information. The importance and application of knowledge sharing within

private enterprise has been well documented (Mannie, Niekerk & Adendorff, 2013). The adoption of knowledge-based platforms in tourism and related industries has also been advocated, to better understand tourist demographics and behaviours (Pan, Scott & Laws, 2006; Cooper, 2005). This intent is also visible in the South Australian Tourism Commission's Visitor Economy 2030 plan, as they look to communicate the value of tourism to the region in order to gain support across multiple levels of stakeholders, including state government agencies, hotels, retail, restaurant owners, and other businesses that tourists may directly or indirectly come in contact with.

Research and data serve as critical tools for government entities to legitimise their investment in specific sectors. Moreover, with internet and smart device connectivity, the field of big data holds great opportunities for festival organisers and the tourism industry overall to gain in-depth insights about their audiences (Li et al., 2018). Understanding audiences, their concerns and fears, will become even more important in a post-COVID-19 world. Opportunities exist not only through social media platforms in highlighting tourist preferences (Rashidi et al., 2017) but also in collecting visitor feedback through festival-goers, hotel, restaurant, or event reviews (Schuckert, Liu & Law, 2015), all of whom will be looking to share learnings from the pandemic. Noting common data collection points for arts festival and tourism planners, the need for collaboration when sourcing tourist data is important. Moreover, with an in-depth understanding of tourist preferences, both arts festival and tourism planners can cater better to the needs of their stakeholders while maximising the potential economic and social impact for the destination.

Approach

Wesley Enoch [Sydney Festival director] has an emphasis on local people and place in contrast to Armfield and Healy [co-artistic directors Adelaide Festival] which have defaulted to prioritising works of scale from overseas. (Wake 2019 The Conversation)

We undertook a qualitative and quantitative study in South Australia to examine value creation and tourism in the arts festival ecology. Our study included a range of data sources in order to triangulate findings. Table 1 demonstrates the richness of our data, aimed at providing nuanced insights from multiple perspectives.

Case studies:

Following guidance, from earlier work, (Etemad & Motaghi, 2018; Fillis & Lee, 2011; Rivera et al., 2016), a case study methodology was employed to explore how arts festivals create value for the South Australian economy. Because in-depth case studies can utilise multiple research methods (e.g., interviewing, survey questionnaires, review of archival documents) and collect data from different sources to triangulate results, they have the potential to enhance the rigor, robustness, and trustworthiness of research findings (Morgan, 1998). For example, data collected from a single source might be biased due to the cognitive limitations of participants, thus, using data from different sources can increase the validity of the findings (Jick, 1979). Importantly, a case study methodology is known to be particularly advantageous when the phenomenon under investigation is not well understood or remains under-researched such as this study.

Year	Process	No. participants	Purpose
2018-2019	Deep, rich case studies of two festivals (French Festival and ZestFest) and 12 other case studies	14 South Australian arts festival case studies	To gather rich, deep data as well as survey data on arts festivals in South Australia in order to inform the following stages of the study.
2019-2020	Semi-structured interviews done sequentially with government officials, policy makers and artists	10 stakeholder interviews 10 artist interviews 10 audience interviews 10 volunteer interviews	To gather contextual data on the situational variables that contribute to value creation and boosting tourism. Demographic information provides insights into the context and unique circumstances that make sense of findings.
2019-2020	Semi-structured interviews with festival directors	14 festival director interviews	To gather foundational data through semi-structured interviews on: (i) demographics (ii) determinants (iii) barriers and (iv) facilitators for festival directors to create value and boost tourism. Demographic information provides insights into the context and unique circumstances that make sense of findings.
2018-2020	Observations, performances, site visits	20 site visits to 60 performing arts organisations	To visit and attend arts festival performances to act as participant observers at arts festivals. Two researchers attended arts festival performances as audience members and observed arts festival staff, volunteers, performers, audiences, as relevant. In some instances, staff, stakeholders, volunteers attended performances, which enabled us enrich observations by conversing with them.
2018-2020	Content analysis (incl. websites, policies, promotional materials, annual reports, internal documents; media reports)	More than 2500 pages of data were analysed	To see how stakeholder organisation and arts festival policies and processes communicate about value creation and tourism. Online and hard copy media reports were scanned from 12 March 2020 (the date COVID-19 was declared a pandemic by the World Health Organization) and 11 May (the date when the Australian Federal Government and National Cabinet started to unwind the COVID-19 lockdown), resulting in 20 relevant media reports.

Table 1: Study stages and processes

Case studies for this report were drawn from the eleven arts festivals which are part of the Festivals Adelaide umbrella organisation, plus the Adelaide French Festival, Tarnanthi and ZestFest:

1. WOMADelaide
2. Adelaide Cabaret Festival
3. Adelaide Festival
4. Adelaide Film Festival
5. Adelaide Fringe
6. DreamBig Children's Festival
7. Feast Festival
8. Adelaide French Festival
9. Guitar Festival
10. OzAsia Festival
11. SALA Festival
12. South Australia History Festival
13. Tarnanthi Festival of Aboriginal and Torres Strait Islander art
14. Zest Festival

In addition to the focal case study organisations, linkages and interactions with arts festivals participants and government agencies were explored to provide a comprehensive understanding of the process of value creation.

Data Collection & Analysis:

We took a holistic approach to data collection and analysis, progressing from raw data coding to thematical analysis (Gioia, Corley & Hamilton, 2012: 20). Data were collected primarily through interviews, surveys, observations and archival records, as follows:

Interviews were drawn from arts festival lists provided by key stakeholders in government and industry. First, interviewees were selected purposively from amongst those who engaged with arts festivals across their different roles, and were sourced through networks, using snowball sampling. Interviews were conducted with senior leaders in the arts festival ecosystem in Adelaide and South Australia (i.e., arts festivals directors) to understand the contextual complexity and issues related to how arts festivals create value and boost tourism. Interviewing provided important insights into the capabilities and decision-making at the target organisations. Table 2 summarises demographic and background information from interview participants in our study.

	Festival directors		Stakeholders			Artists		Volunteers		Audiences		Total
	Female	**Male**	**Female**	**Male**	**Non-binary**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	
No. of participants	9	5	7	3	1	7	4	8	2	7	3	56
Nationality	14 Australian		9 Australian, 2 UK			10 Australian, 1 Asian		9 Australian, 1 Asian		10 Australian		n/a
Age (mean)	49		44			48		50+		50+		n/a
Career point												
• Early	0	0	1	0	1	2	3	0	0	n/a	n/a	7
• Mid	1	0	2	1	0	2	0	0	0	n/a	n/a	5
• Established	8	5	4	2	0	3	1	8	2	n/a	n/a	33
Type of position												
Arts manager	14		10			0		n/a		n/a		24
Performance Artist	0		0			8		n/a		n/a		8
Visual Artist	0		0			3		n/a		n/a		3
Journalist / Media	0		1			0		n/a		n/a		1
Retired	0		0			0		n/a		n/a		0
Unemployed	0		0			0		n/a		n/a		0
Type of organisation												
Festival organisation	13		0			0		n/a		n/a		13
Government body	0		2			0		n/a		n/a		2
Arts organisation	0		4			0		n/a		n/a		4
Independent	0		1			0		n/a		n/a		1

Table 2: Study participants' background

Second, we interviewed government and other supporting organisations, senior leaders, tourism marketers, policy makers, linked to particular arts festivals as well as participants of each arts festival, such as artists. Third, we interviewed artists who presented work at festivals.

We used an interview guide for consistency; however, our objective was to guide participants to lead the conversation in a manner important to them when recounting their arts festival experiences. The interviews lasted around 40-50 minutes and were digitally

recorded and transcribed. We interviewed until data saturation was achieved. Data collected by interview were transcribed, coded, and analysed thematically, being further verified for accuracy through triangulation (e.g., comparison across multiple data sources).

Surveys enable the eliciting of responses from a selected population. Through a systematic sampling procedure, surveys provide a higher level of generalisability and robustness of results (Morgan, 1998). We administered two surveys in order to collect data about resources, institutional environment, decision-making, demographics and other variables from two arts festivals (e.g., Adelaide French Festival, Zest Fest). Measures and scales used in this report were adopted from empirically validated sources where possible (e.g., Troisi et al., 2018). Two separate reports on surveys of Adelaide French Festival and Zest Fest are available on request. Data collected by survey were analysed using appropriate statistical software and analytic techniques.

Observation Two researchers attended multiple performances at arts festivals. They also undertook 20 site visits of arts festival facilities, offices, performance spaces and venues. Furthermore, we triangulated observation data with interview data, survey results and secondary data (e.g., websites, policies, and legislation) (Krippendorff, 2013). This approach provided us with a clear understanding of value creation, internationalisation and tourism from multiple perspectives.

Content analysis provided a contemporary and historical overview of arts festivals in South Australia (e.g., Don Dunstan Oral History Project Transcripts and festival annual reports), set against the backdrop of the rise of COVID-19, the global virus that swept the world at the end of 2019, reaching Australia in early 2020. Media reports were collected by searching all Australian media reports on arts festivals, tourism and COVID-19. Archival records were reviewed to collect data about characteristics and outcomes relevant to the arts festival ecology and to verify information obtained from interviews. Relevant government and other statistical data were examined. Content data collected were thematically analysed.

Findings

THE CHALLENGES ARE THE STRENGTHS FOR ARTS FESTIVALS. THEIR INCLUSIVITY. THEIR OPEN ACCESS. YOU DON'T KNOW WHAT YOU WILL GET. THE SURPRISE ELEMENT IS WHAT PEOPLE SEEK AT OUR ARTS FESTIVALS. NONETHELESS, THERE ARE PERCEPTUAL CHALLENGES WITH OTHER STAKEHOLDERS. (KATHERINE, ARTS FESTIVAL CEO)

The notion of arts festivals and tourism dates back to the late 1970s (Woollacot, 2019). However, as some arts festivals cater to niche audiences, there remains a division between arts festivals and tourism. Hence, until quite recently 'ne'er the twain shall meet.' In other words, the focus on arts festivals and their contribution to tourism has been ignored largely. The separation of arts festivals from tourism has limited the development of arts festivals, as well as for their leaders and staff, volunteers and board members, and for the City of Adelaide and the state of South Australia. In a post-COVID-19 world, rapidly reframing links between arts festivals and tourism is both urgent and important, as nationally 255,000 events have been cancelled at a loss of $280 million at 24 March 2020 (Caust 2020a). This section provides the evidence from participants and media reports in the arts festival ecosystem under the five headings that emerged from the data, but also accorded with government policy focus.

Collaboration

Collaboration is a means of inter-connecting to build capacity, raise resources, mentor, coach and develop arts festivals, the city and the state. Collaboration is more important than ever in the COVID-19 world. As one key stakeholder in government shared:

> No one knows what the future will hold for arts festivals. It [COVID-19] is paralysing some people. While for others, they are just getting on with it and making new work. (Jane, CEO of government agency)

The 'uncertainty' and 'unknowns' mean arts festivals are operating in a 'very difficult environment' with arts festival artistic directors and CEOs exploring 'many different options' from when audiences will feel safe to attend events; how many people will attend arts festivals; when travel will enable international artists to participate in arts festivals again; to when they can bed down the next arts festival program. The collaboration provided by arts

festivals linking resources in order to form Festivals Adelaide has proved to be a major coup for the advancement of arts festivals in South Australia. With a partnership between all major festivals, Festivals Adelaide and City of Adelaide, Festivals Adelaide is ideally placed to push the arts festival agenda for the benefit of the state. Indeed, local government (e.g., through City of Adelaide for Adelaide Festival) is a major supporter of arts festivals. As one senior participant from an arts association suggested:

> Partly why Festivals Adelaide exists is to make sure that the power of the grouping is significant and that our voice is heard when we're not represented by the agency within [other government sectors]. (Carole, CEO of an arts association)

Indeed, the emphasis on collaboration between arts festivals and tourism is evident in the Arts and Culture Plan for South Australia and the South Australian Visitor Economy Sector Plan. In recent years, the integration of arts festivals within tourism planning, at least at a strategic level, is recorded. As one senior tourism participant shared with us:

> There was heavy consultation on the 2030 strategy with a number of stakeholders, including the arts and festivals groups…. I don't think those groups were happy, they felt like they hadn't been adequately captured or represented. And so, we went back and revised the strategy and included some more detail to flesh it out. From that perspective, we're open to working together. It should be a collaborative environment and we take on board feedback. (Bernard, director at a tourism agency)

While arts and tourism have traditionally functioned as two separate domains within government, there does appear to be a gradual shift in exploring a more collaborative approach in South Australia. However, although both arts and tourism stakeholder groups acknowledge the benefits of collaborating, the process is not achieved overnight with good intent alone; as one Adelaide arts festival director noted:

> VisitScotland decided after many years of resisting to take on the idea of them selling Edinburgh Festival and Fringe to the world because their expertise is in marketing to tourists. The growth that Edinburgh Fringe has experienced in terms of the visitor numbers is exponential as a result of that change. Whereas in Adelaide we are left to do our own marketing without the tourism commission support. The results for arts festivals speak for themselves. (Hillary, major festival CEO)

Nonetheless, the pride and solidarity engendered by arts festivals is not always sustained. There are tensions between arts festival leaders and tourism. Tensions have taken the form of anger, frustration, helplessness and disappointment at the need for greater support and capacity building for arts festivals. It has been a source of complaint by many festival directors and stakeholders, as more than one opined:

> We don't expect the SATC to market for us, but we do believe that with access to better resourcing, we know who our target markets are, and we can go get them directly. (Carole, CEO of an arts association)

While the interaction between arts festivals and tourism was a key theme in the interviews, it was also clear that the need for collaboration is not limited to the tourism domain alone. This is especially the case with arts festivals cancelled, artists unemployed to a greater extent than other job categories and in crisis due to the international pandemic, COVID-19. For example, as the online content of two artists reveals:

> I felt numb. We are living in conditions that are unpredictable every day. (Annette, artist)

And again:

> I am definitely finding it difficult to move into a creative headspace. My cognitive load has been taken up by survival. (Amy, artist)

Survival has become urgent due to artists using their 'creative headspace' to reconfigure works online but without the support of income from audiences, it is a hard slog (Caust 2020b). The collaboration between external stakeholders, executives and staff, boards, government, philanthropists, sponsors and artists of festivals highlight the importance of personal networks and reputation, in driving value back to the festival. The role of personal networks in driving programming for arts festivals was a recurring theme, as one festival director discussed:

> It's really hard… to nurture that relationship [with a content partner] when I am expecting them to be able to give me the information that's quite outside their normal timeframes… but because I've got a good relationship with them, they "lock in a couple of things for you." (Jaclyn, Artistic Director at an arts festival)

Networks form a basis for collaboration. Another arts festival producer echoed the importance of such networks when deciding to hire the Artistic Director for the festival:

> I wanted someone to come in, really as a curator, who wasn't attached or [too exposed to this arts festival]. Someone who knew musicians from all different musical genres, which she does through her background with [other music events]; but wasn't attached to one particular art form… knows many different artists. (Evie, Producer at a major festival)

One of the challenges for tourism planners is to promote destination offerings based on the booking habits of a target audience. This is not only limited to traveller preferences (interests; mode of travel; duration of stay; et cetera), but also requires an understanding of when various traveller demographics choose to book their itinerary for a destination. As one tourism representative suggested:

> [An important element in collaboration on marketing is] timing. Getting information as early as possible… the earlier, the better. The more information we can get [from festival organisers], the better, because then we can plan." (Bernard, Director at a tourism agency)

However, from one major arts festival organiser's perspective, the focus on arts festivals is still limited within South Australia's tourism marketing arm, as the tourism agenda is primarily driven by visitor numbers, rather than quality of spend. As one arts festival manager elaborated:

> There's a culture within the South Australian Tourism Commission that believes that unless it's something like a car race or a gigantic rock and roll concert, or something that instantly hundreds and thousands of people are going to want to go to, then there isn't anything else that's very interesting [to promote to potential tourists.] They don't understand what we do at all. (Richard, major arts festival CEO)

The focus on more mass participation events and festivals is also recorded in SATC's original draft for industry feedback of the Visitor Economy Sector Plan 2030 (February, 2019), which referenced sport and mass participation events, but none of the major arts festivals, such as the Adelaide Fringe and Adelaide Festival. As one interviewee recorded:

> The SATC plan does talk about festivals in relation to the [arts]. That's good because, let me tell you, the draft didn't… so we really freaked... but to their credit, they listened to us, and that's amazing… We thought it might actually be a deliberate strategy for a while there, but it wasn't. It was just an oversight. (Carole, CEO of an arts association)

These comments highlight that developing trust between arts festival organisations and tourism bodies is still a work in progress. High spend visitors to arts festivals, in particular, also spend on accommodation, meals, transport and other events. For example, one Korean high spend visitor spent six weeks in Adelaide in 2019, attending one or more events at the Adelaide Festival and the Adelaide Fringe daily. She also dined out; took taxis to scenic spots outside the city, such as in the hills and to the wine regions. As she stayed in an Airbnb, her visit is not captured in visitor numbers, as one arts festival leader opined:

> Staying with friends can give [international and interstate festival visitors] a much richer experience, and Airbnb is a phenomenally large network of accommodation now. Therefore, sometimes what we see the numbers coming in for festivals and what the hotels report [to SATC] is different, and rightly so. [SATC is] looking at visitors who stay in hotels whereas we know experiential visitors may be a little braver. (Carole, CEO of an arts association)

While total number of visitors is crucial for tourism outcomes, the importance of total spend by tourists is equally important. Arguing the importance of driving more interstate audiences for arts festivals, one interviewee argued,

> If you consider attendance at the opera, for example; opera people tend to have more money, it's a demographic thing… the cost of the tickets at [our festival] already pushes it towards a demographic of people who've got more resources. (Richard, major arts festival CEO)

Indeed, travel and tourism experts predict a significant rise in airfares and immediate leisure travel after the COVID-19 pandemic. This increase in airfares potentially will see arts festivals as a market for more affluent members of society (Whitley, 2020; Helmore, 2020). As the travel and tourism sector prepares to welcome such potential travellers in the near

future, so should arts festivals in collaboration with tourism to support a sustainable local economy that includes artists and businesses within the wider tourism economy.

The main challenge in collaboration, however, appears to be in relation to regular communication of knowledge and insights between stakeholders in the ecosystem. The arts festivals and tourism leaders need regular engagement to align and understand how festivals could fit with pre-existing objectives of tourism. This theme is further explored in the 'Knowledge Sharing' section of this report.

Challenges in collaboration were noted when festival organisers tried to secure relevant content and programming for their arts festivals. As the objectives for artists may often go beyond commercial objectives alone, festival organisers often have to be flexible when trying to collaborate with artists or potential content providers. As one arts festival director noted:

> Because it's a small country town, and the event is run by volunteers. They receive our email saying, "Please register" and they respond "It doesn't fit your dates" or "it's too expensive to register. We'd rather put that money into something else." And I am like, "No, it fits! We want it! I'll waive the fee." So, it's about helping them get audiences as well [through our marketing]. (Jaclyn, Artistic Director at an arts festival)

Knowledge Sharing

When arguing the importance of arts, the benefits are frequently recorded in relation to social impact (Landry et al., 1993). Indeed, some arts festivals cite specific social impacts are their primary objective. As noted on the ZestFest website:

> Modern ageing celebrates living life to the fullest and ZestFest creates a great opportunity for that through a festival which truly reflects what ageing can and should be in the 21st century. (COTA SA, 2019)

Comparing the experience of working with an arts festival to some other arts festivals that measured success through more quantifiable economic outcomes, one festival director suggested:

> The organisation is interested in providing new opportunities and getting participants to try new things. With other festivals I've worked for in the past I've been interested in things like bed nights, spend by visitors. But that doesn't seem to be what this particular organisation is interested in tracking… they are interested in number of events that are held, number of attendees, that sort of thing. (Jaclyn, Artistic Director at an arts festival)

While many festival directors acknowledged a connection with tourism outcomes at some level of their festival planning, it was also evident that the primary focus of why arts festivals existed was attributed to serving the artists or the art form. Critiquing another festival for focusing too much on economic results in their reporting, one festival producer added:

> It's [arts festivals have] become a tourism driver. They do great things for the state economy. But let's strip away tourism for a minute and talk about the arts. (Evie, Producer at a major festival)

Indeed, artists also voiced concern if they saw greater emphasis by the government on the economics of arts rather than artist development and collaboration. As one female artist shared her perception that:

> As a Canadian, I find South Australia not very welcoming for artists. At the Art Gallery of South Australia, it seems that the curator or director is good at fundraising, but there's no collaboration or move to meet artists. (Emily, South Australian based artist)

While this perception may not hold up on closer examination, as the Art Gallery of South Australia does have a program of engaging with artists, it is a perception of some stakeholders. As they say, 'perception is reality.'

A significant portion of stakeholders involved with arts festivals lean towards the importance of arts for social impact. Thus, tourism and arts focus are on different measures of success. While there is some commonality in the benefits they can bring to the local economy and society jointly, the wider issue is about each side understanding objectives, processes, and challenges of the other. This has partly been demonstrated in the earlier 'Collaboration' section of this report, where it was noted that both arts festival organisers

and tourism marketers work within different timelines to meet the expectations of their respective stakeholder groups. Such variances and the importance of learning from each other were highlighted by interviewees, as one festival director suggested:

> Festivals have got more learning to do in relation to working with tourism. We need to be active players in the tourism industry …creative industries have been identified as an opportunity for growth, and arts festivals specifically. (Richard, major festival CEO)

In other words, tensions and learnings are two-way. Nonetheless, through interviews it was evident that tensions between arts festival organisers and the South Australian Tourism Commission were longstanding. Both sides agreed on the importance of working together; however, expectations differed. As one festival director suggested:

> [SATC representative] told us that he categorically has evidence that people do not travel for cultural experiences. And we're like, "What? Where did you get that evidence? And when did you do that [research]?" He says: "I'm very data driven," but where did you get this data from? (Hillary, major arts festival CEO)

The interviewee further suggested:

> We know that a high percentage of international tourists say that they want to come and experience Indigenous storytelling when they come to Australia. They want to have Indigenous cultural experiences. For example, there are unbelievable opportunities for them to hear Aboriginal stories [at arts festivals] … all these things point to the fact that the audience hunger is there; the audience demand is there. (Hillary, major arts festival CEO)

The proposed Australian Aboriginal Art and Cultures Centre at Lot 14 recognises the importance and opportunity that Aboriginal art brings to the state, not only in tourism but also in the arts. There is a hunger for Aboriginal experiences that are not sufficiently catered for in current offerings, despite the rich Aboriginal history. With a focus on domestic tourism more likely after the pandemic, the positioning of the Aboriginal gallery could cater to a domestic market hungry for new experiences that are enriching but safe and on their doorstep.

It is important to note is that the interviewee questioned the source of information when challenging SATC. However, they may build their own perspective from anecdotal evidence or data that is not officially recorded. This is a critical learning, as both sides need to collaborate not only on working together to maximise economic and social outcomes through arts festivals, but also need to be able to achieve this collaboration as they gather and interpret data to support identifying opportunities. Moreover, the importance of gathering data is not limited to arts festivals' engagement with tourism authorities alone, but also with other government entities. One interviewee commended the Adelaide Festival:

> Adelaide Festival under Rob Brookman has really sharpened their data capture. Data need to be robust to make an impression on government. (Juliana, senior representative of an arts authority)

However, research and data analysis are expensive processes and require expertise which many arts festival organisations do not have available. As some stakeholders noted:

> I can't tell you a huge amount about the aggregated cultural tourists who come through only because we survey economic data. We haven't done lots of genetic cross-examination of that data. We could. I just haven't had the resources or, I guess, the know-how to do that. We have access to a lot of data … but I certainly don't have time to do it, and I need good resources (Carole, CEO of an arts association)

And again:

> [Our festival] has grown, without a doubt. However, I think our data capturing models changed from year to year because data capturing is actually really expensive, and we do everything on the smell of an oily rag. So, our view is always to try and figure out how to get the same modelling every year, but at the same time, be responsible and we can't just keep throwing all our money at data-driven research. (Jared, arts festival director)

With incomplete and inconsistent records of data capture, particularly the limited ability to identify trends, opportunities, and challenges about the types of tourists attending arts

festivals and their primary motives, arts festival organisers face challenges when approaching SATC or potentially other government entities for funding and support. While there remains a challenge in directing adequate resources to research, arts festival organisers may need to review more collaborative methods of working, pooling resources with wider tourism industry and stakeholder groups, such as hotels and accommodation booking platforms, financial service providers, retail and Food & Beverage operators, other arts festivals, amongst others, to capture the impact arts festivals could directly have on the tourism economy year-on-year. Indeed, the Australia Council of Arts' (2020) report on Domestic Arts Tourism across Australia indicates the exponential growth in interstate travel for cultural tourism. In terms of daytrips, arts activities attracted more than double the number of tourists "compared to organised sport events, and were more popular than markets, heritage sites, wineries, wildlife parks, zoos and aquariums, amusement parks and casinos" (Australia Council of Arts, 2020, p. 14). While such reports give the arts festival organisers an in-depth insight into the potential appetite of interstate arts tourism, it is not a direct endorsement of the success of their respective arts festivals. Arts festival organisers and their partners need to directly drive such initiatives to ensure the success of their festivals.

Simultaneously, arts festival organisers need to keep an open dialogue with these stakeholders to consistently share the impact of arts festivals, encouraging partners to better utilise such data in planning and communication. This is noted in SATC's plan where one of their strategic priorities is to promote the value of tourism to the wider community:

> Promote the value of the Visitor Economy in plain, accessible language using evidence from highly credible data sources. (South Australian Tourism Commission, 2019, p. 27)

The focus need not be limited to justifying the impact of arts festivals for the tourism economy. Arts festivals play a wider role for the community beyond the economic measures. As one tourism representative acknowledged:

> There's a role for the arts, events and festivals in bringing tourists into Adelaide. But there's also a second component, which is where locals get involved and obviously add that level of vibrancy and contemporary culture, et cetera, that when

> a tourist does come to Adelaide during that period, they have an amazing experience and think "Wow, Adelaide is quite a happening place." (Bernard, director at a tourism agency)

Arts festivals play a role in bringing the community together. This is occurring in 'virtual reality, augmented reality, and the live recording of performances' (Keen, 2020a; 2020b). In liminoid spaces, participants may often leave with better understanding and acceptance of other communities, shifting traditional perspectives. As one interviewee suggested when discussing arts and disability at festivals:

> [After the show] we had a good conversation on the way home about the performers. And I thought here's one person who now knows more than they did before and may look at disability differently. [Because the performers perform] with the utmost of integrity and professionalism. (Anna, board member of a community festival)

Certainly, some arts festival stakeholders commented on the role arts festivals played in educating visitors. As one stakeholder suggested in regard to ZestFest:

> [The ZestFest director] provides advice and support to arts and cultural organisations on older audience development [for festivals]. (Jaclyn, Artistic Director at an arts festival)

Meanwhile another interviewee saw the role of the arts festival in changing wider perceptions about the art form itself and supporting the artistic community:

> Some people think [this art form] is a bit cheesy or whatever, so there's something about really trying to be a voice and showing everything that it can be. (Evie, Producer at a major arts festival)

Arts festivals can, therefore, be leveraged to bring about a change in community attitudes and perspectives, while contributing to a "feel good" effect around community and tourist engagement. What is also demonstrated is the importance of communicating the value of arts and arts festivals to the community and government agencies. While the findings in this report demonstrate that some arts festival organisers have started adopting more robust data capturing techniques to meet the expectations of wider stakeholder groups, including

government, others still need further support, either financially or in terms of skills and resources. One important point to note is that other government entities, such as SATC, have started explicitly citing the need to communicate the value of their sector to the broader community. As SATC lists in their 2030 plan:

> Tourism, and the broader visitor economy, has a key role in driving real jobs and economic growth across South Australia. Recognition of the value that this industry contributes to South Australia is important in a variety of contexts. At a grass roots level, it is essential that communities understand the jobs impact of visitors to their area and the role this plays in sustaining local businesses, services and population. Community endorsement of the Visitor Economy will allow for a range of stakeholders, including local government, to invest with confidence. (South Australian Tourism Commission, 2019, p. 27)

Indeed, while arts festival organisers may argue shortage of funds as a reason for limiting their ability to capture data and share research with the wider community, such data may be crucial for relevant government agencies to justify the value of arts festivals for the community.

Financial Sustainability

Financial sustainability is critical for arts festivals if they are to thrive and survive while operating on a knife edge. The performing arts sector was the first to be affected by COVID-19, when gatherings of more than 500 people were banned in 16 March 2020, while the sector may be the last back on deck in the recovery phase (Bailey, 2020). For example, 53% of the sector is no longer functioning due to closures during COVID-19, illustrating the 'difficult task ahead' (Caust, 2020a), in a sector where many people work 'gig to gig, festival to festival' (Burke, 2020). The level of instability in the creative sector is unprecedented, affecting financial sustainability. While this report has explored the importance of collaboration and being able to gather and share knowledge, it is also clear that collaborative practices are enablers to support arts festival organisers in achieving diversity in their funding sources. Through interviews, media reports and a review of South Australia's Arts and Culture plan, the following sources of funds were identified for arts festival organisers:

- Government support;
- Ticket sales;
- Merchandise sales;
- Sponsorships; and
- Philanthropy

As the chairmen of three major performing arts companies said, the performing arts (which includes arts festivals) faces an 'existential crisis that philanthropy alone can't solve' (Bailey, 2020). Further, media content is a reminder of the precarity of employment for many in the creative sector and the breadth of financial responsibility that many in the industry feel during a pandemic:

> Artists and arts workers are parents and grandparents. They pay taxes, rent, mortgages and contribute to the economy. Their passion results in extraordinary creation: think of all the music you listen to, the paintings and artwork you love, the movies you adore and the books you are reading to get through this dark time (Caust, 2020b).

In short, arts festivals contribute more than financial sustainability (e.g., well-being) while it remains central to survival in unpredictable times; they also contribute emotional release and an immersive experience for artists, their families and friends, bringing social and economic gains.

Even before the COVID-19 pandemic, commercial sponsorships have been more difficult for arts festivals to obtain, due to limitations around delivering strong return on investment back to sponsors. Sponsors expect a strong sense of accountability and concrete marketing outcomes for their investment. It requires resources to service their needs. Nonetheless, the arts have been successful as a sector in philanthropy. This success echoes the changes big corporations had been leading within their industries, with a growing focus on establishing corporate foundations justifying a "social licence" to operate in society and meet the expectations of Millennials and Gen Z customers (Durkin, 2019). As one arts festival CEO opined:

> Not only is philanthropy growing to be much more important to the arts than commercial sponsorship, but the relationship that exists between the donor and

> the company is a healthier relationship. It's certainly a more pleasant relationship. It's less one of master and servant. (Richard, major arts festival CEO)

It could also be argued that in order to support arts festival organisers to be more financially sustainable, the government may need to support efforts to highlight the value of arts festivals for South Australia and encourage and build philanthropy to the arts. As one festival director suggested:

> [Philanthropy] doesn't have to be like the big bequests only. I'm really interested to see if South Australia can take the philanthropic sector seriously, like raise it up. How can we bring up giving to the arts? (Hillary, major arts festival CEO)

This festival director welcomed philanthropists to this arts festival, and the relationships that it enabled arts festival directors to develop. Similarly, another arts festival director suggested:

> Philanthropy's growing; sponsorship dollars are becoming extremely difficult in the arts and the arts festival sector… Nationally, sponsorship dollars to the arts are going down and philanthropy money's gone up. But that's something in which we need a lot more education in the state: giving to the arts. (Hillary, major arts festival CEO)

With static or declining government funding, some major arts festivals have started to adopt more creative funding sources. However, as one major arts festival director commented in relation to another major festival, it is not always perceived to be a positive outcome:

> What the [festival] did was create this huge database so that now they have a membership; massive numbers of people, like a subscription. You sign up … Subscribers get an email each day telling them what shows are available for half ticket price. What that's done is destroy full price ticketing because there are vast numbers of people who are on that subscription. It's kind of gone around the wrong way. (Isaac, major arts festival CEO)

Such a strategy allows arts festivals organisers to: (i) help artists to further monetise their ticket sales and fill the venues; (ii) help audiences to have the option of affordable tickets to festival events; and (iii) help festivals to maximise their reach. However, these models pose

challenges, as suggested by the interviewee. What was evident through most interviews was that the arts industry had explored alternate sources of funding for many years. However, while some of the larger and more established arts festivals were able to expand their sources of funding, some of the smaller arts festivals, including the artists themselves, were still more reliant on government funding. As one arts festival producer suggested:

> There's not been a lot of philanthropic money for a long time. I spoke to the Premier who said, "you need more philanthropic, not government money." I said, "philanthropists will come in for five years, give you a whole lot of money and then leave. The reason this arts festival has gone on for so long is because it was started [over 40 years ago] by an insightful government and you continue to this date to fund it. That's why it's had such longevity." (Sarah, producer at a local arts festival)

The interview highlighted, (i) the importance of government funding in a sector decimated by COVID-19; (ii) the need by some arts festival leaders for skill development; (iii) the need for support for artists and other independent workers in the arts sector due to COVID-19; and (iv) a perceived weakness in a small state with few head offices, corporate foundations, and a small population for philanthropic opportunities. These factors add to the complexity of securing long-term and consistent funding and indeed philanthropy for the arts, each of which may be sporadic rather than a long-term strategy (Frank & Geppert, 2004). The challenge is not limited to the culture of corporate giving and philanthropy only, but also within the arts sector itself. There are board members who, we were told, are more emotionally involved in the art form, with a focus on social impact rather than pure economic outcomes, and a need for stronger governance in the arts. As one museum representative discussed:

> There are issues around love and desire for the museum; location in a time and place; which have tugged upon people from many different directions. The museum has lacked governance and leadership. (Nicole, senior museum staff)

These matters need attention. A need for stronger arts 'governance and leadership' can limit an arts festival's opportunities to demonstrate accountability as well as opportunities for board members to aid income diversity due to inadequate focus on strategy and too much attention being given to operational matters.

When we shift the focus to a core stakeholder of the arts sector—artists—they face an even greater challenge when seeking funding. Two early career artists discussed accessing funds through family or keeping additional income sources, such as another job, to grow their arts practice and experience:

> The only reason I could put that work on was because my dad works in engineering and he was like "I can fund you to make your own work." So that was very nice… otherwise I applied for the Adelaide Future Artist Fund and other stuff, but I wasn't super-experienced in grant writing and so I got nothing. I had nothing else to back me up. You need experience to get funded, otherwise you're not going to get it… even with the Fringe show that I did in 2017… we didn't [technically] get paid for that because the funding was only to cover the performance production costs. (Christine, an early career artist)

Such support has been argued as essential in an industry which has relied on goodwill to get things done on the one hand, but can be a barrier to diversity in the arts on the other hand, limiting the ability of arts festivals to bring in new ideas from those with a different background. Again, another artist who perceived the challenges and opportunities, shared the mindset while recognising the need for skills development:

> Partnerships and relationships are going to be the thing that get us through. It will come back around as this capitalist phase tires itself out … We think the arts ecology [is important], but you also have to have a self-ecology. If we think about sustainable careers, you do need to have a diversity of income streams and a diversity of activity to maintain your practice… Partnerships are valuable. Philanthropy is fundamentally a partnership and is relationship dependent. Although I wouldn't rely on that in South Australia, especially in the independent and smaller to medium sector. (Alison, a South Australia based artist)

The ability for artists to secure funding goes hand-in-hand with the stage in their career and overall experience within the arts sector. Yet, as discussed in the 'Glocalism' section of this report, many artists don't necessarily consider arts festivals as a direct source of funding, but rather a space to gain exposure and reach wider markets that would support developing their careers. Indeed, through experience, artists learn of the importance of networking and

story-telling, not just as artistic expression but also as a means to gain funding or support. As one stakeholder noted:

> We've had some success in seeking grants the past 12 - 18 months. Because of my background in media management, I understand the value of telling compelling stories… That's helped with our success in grants and explaining to people why we need funding and what funding will do for us, how we've used funding successfully in the past to make a difference to the work that we do and therefore to the community. (Cara, a theatre company representative)

The importance of a narrative around funding applications makes a difference to the community and also often to the grant outcome. It also touches on the importance of knowledge sharing and the narrative itself. These commonalities demonstrate that the three themes explored thus far—collaboration, funding, and knowledge sharing—are interdependent with financial sustainability. However, as seen in this section, the time are challenging, and solutions require commitment to a collaborative approach that breaks down traditional barriers.

Tourism Marketing

Arts festivals have a historic connection with Adelaide and the state of South Australia. While views about the role of tourism marketing and who should do what was an area of contention, the 'changing landscape' of tourism marketing in the state was also mentioned by one key stakeholder. For example,

> We are enjoying a different relationship with tourism now after bushfires and COVID-19 as they seek to reinvent themselves. There is a different valuing of all the state's cultural and tourism assets that means the landscape is changing. Of course, tourism and arts festivals (as part of the creative industries) are the two sectors most affected by these crises. (Jane, CEO of government agency)

This has been evident in state government policies over the last 60 years, including in the Arts and Culture Plan 2019, and was also highlighted during interviews. As one stakeholder suggested in a headline quote used in the Introduction of this report:

> I was Adelaide born and bred, so it's in my blood. And I've watched this from being a very boring place, I cannot tell you how dull Adelaide was in the '60s… culturally it was a desert, it was very white, very bland, and it is miraculous that something like the Adelaide Festival got planted in that environment and that it succeeded. And it had such an influence on the development of all of our other cultural institutions. (Richard, major arts festival CEO)

Similarly, another festival director suggested:

> The legacy from 1960 onwards has created both a local culture that is accepting and positive and engaged, but also it actually informs their sort of self-image or sense of worth of the place. That goes right back to its founding principles as a free colony and a utopian city and all of those things. The city and the state have had a very strong social element to their fabric. Social ambition, whether it's women in the parliament, it's a city that engages really well with that and for that reason these festivals really do work to their best advantage in this city. (Isaac, major arts festival CEO)

Indeed, Adelaide's early exploration into the domain of arts and cultural activities allowed the development of some arts festivals that have become integral to the city's positioning across Australia and the world. Moreover, the age of some of Adelaide's oldest arts festivals presents a strategic advantage in their positioning to interstate and international travellers. As one arts festival director suggested, defending Adelaide Fringe in comparison to other Australian Fringe festivals:

> [SATC representatives have said] "There's a Fringe in Sydney, there's a Fringe in Melbourne." … These Fringes are tiny. They're nothing like the Adelaide Fringe. It's up to tourism to sell something like the Adelaide Fringe as the unique experience that it is. It is not the same as the Sydney or Melbourne Fringe. The expansion of the Adelaide Fringe has occurred over decades, and that's why it's actually very hard for another city to copy that model and succeed overnight. (Hillary, major arts festival CEO)

While the age of some of Adelaide's arts festivals, and the reputation they have developed over the years, allow for better tourism positioning for these festivals, Adelaide is

recognised as a festival city. This positioning has emerged not only due to the number of festivals the city hosts, but also due to the walkability and connectivity of the city, which presents as another competitive advantage. As one representative from an arts authority suggested:

> "It is a festival city. In other cities, arts festivals can get lost, because the cities are so big" (Juliana, senior representative of an arts authority)

Similarly, a tourism representative added:

> Adelaide is really accessible, it's easy to get around. A lot of things are centred in the city centre… SATC marketed for a long time that you literally walk out of your hotel door and into an event. (Bernard, director at a tourism agency)

This suggests that while the established arts festivals may be more marketable, features such as walkability and connectivity of the city are complimentary characteristics even for the smaller arts festival organisers to leverage. Moreover, the advantages of geographic positioning may not be limited to the city alone, as one festival director suggested:

> Something like SALA has been tried in Tasmania, New South Wales, Western Australia; but it hasn't worked. It failed for various reasons, but it works here because South Australia is about festivals. Also, the size of the state, the geography of the state, it just makes a day tour across the region easier. (Katherine, CEO of an arts festival)

Such notes highlight that Adelaide and South Australia present a unique opportunity for arts festivals, given the history, reputation and connectivity of the city and the state. The city's features and the number of entertainment options for visiting tourists, present a competitive marketing position. The argument over tourism marketing dollars should, therefore, not be focused on arts festivals against other festivals, but rather, the overall positioning of an "always on" city for tourists. As one festival director suggested:

> [What attracts tourists] is the great combination of experiences… The average length of stay is around 6.6 days. That means there are some people who are pigging out and staying for 10 or 11 days and there are some that are coming for three or four days. But typically, people are looking for half a dozen experiences

> that they are unlikely to get anywhere else during that period. (Richard, major arts festival CEO)

Similarly, one tourism representative suggested:

> Tourists go back and say, "Gee, I had a great time in Adelaide. There was a lot of stuff on, I knew what was on, I went to three or four things; a concert in Botanic Park, I went to the theatre. Adelaide is a happening place, so easy to get around." (Bernard, director at a tourism agency)

It is interesting to note in the comment the emphasis on tourists knowing "what was on"; an acknowledgement that Adelaide does have a busy calendar of events and communicating them to tourists and residents is critical. Also, it is worth noting that the tourism representative references the surprised reaction from tourists, suggesting that many visitors may not expect as much as they receive from their Adelaide experience. This suggests Adelaide and South Australia are still growing their image in the minds of current and potential tourists.

SATC listed over 500 events over 52 weeks on their marketing sites to position South Australia's events and entertainment offering as an "always on" experience for visitors. However, while having a breadth of events spread across the seasons is an inherent characteristic for a festival city, the importance of timing has also been discussed in earlier sections. That is, Adelaide's most promotable arts festivals need to have their themes, visuals and key programming confirmed in advance in order to be marketed in adequate time to build interest amongst potential tourists and drive their bookings to visit Adelaide. Timing is also important when slotting in major attractions or shows that could drive more interstate or international audiences. As one international journalist suggested:

> The tempo is different. The rhythm of the Adelaide Fringe is different [compared to Edinburgh], because there are no shows on in the daytime during the weekdays. It's just the evenings and it's just the weekends. Most Mondays there are no shows on. This is a symptom of the time of year, people are still at work. People are still at school. It's also a symptom of the tourism numbers. [Compared to Edinburgh,] Adelaide doesn't see as many people coming from, even inter-state, let alone internationally. Because you've got a mainly local audience, they're probably going

> to be at work during the day, so they are only going to go to shows in the evening. (Gregory, an international journalist)

This again leads back to the importance of knowledge sharing. An understanding of interstate and international tourist buying behaviours, key holiday periods, and preferences is important not just for SATC to monitor, but also for arts festival organisers who want to drive more interstate and international tourists. The mix of tourists does not only support the local economy, but also supports international exposure for local artists, as explored further in the Internationalisation section of this report.

Another challenge of having a busy arts festival calendar across the year is picking the "winning horse" from a tourism marketing perspective. Tourism and festival planners need to work closely in identifying performances that could be positioned as exclusive to Adelaide or South Australia. This would, in turn, compel interstate and international tourists to plan a visit with the festival being a primary reason. As one tourism representative suggested:

> The biggest thing SATC looks for is what is unique to Adelaide, first and foremost. Some arts festival events, as a whole, are unique, in the sense of being very special events. But some events are part of a nation-wide tour. Generally, SATC will just promote the festival as a whole and talk about it as the second largest festival in the world, amazing. WOMAD obviously is unique in Australia… [with festival marketing, SATC's main question is], "What are the premieres or exclusives to Adelaide." (Bernard, director at a tourism agency)

While some arts festivals have had the financial backing to bring in exclusive shows, there has been an argument that this could be significantly improved if arts festival and tourism agencies collaborated more closely on funding and marketing. As one festival stakeholder suggested:

> We've asked for a headliner fund to Festivals Adelaide [the umbrella arts festival body in South Australia], so that the festivals could potentially pull some money from that to bring in an act that will be exclusive to South Australia, therefore, driving visitation to come and see that act… We've requested that because we know that we will grow visitation if we have access to some headliner funding.

> Some festivals, of course, will be bringing in acts exclusively anyway, but this additional fund would be a boost. (Carole, CEO of an arts association)

A successful tourism marketing effort, however, relies on collaboration between arts festival organisers and tourism agencies. Tensions between SATC and arts festival organisers become evident when SATC's official social media channels, such as Twitter (@South Australian Tourism Commission), do not publicise the opening of the 60th year of the Adelaide Fringe or the Adelaide Festival. SATC instead highlights sport events, such as ISPS Handa Women's Australian Open and the build up to the ICC T20 World Cup. If arts festivals are to become key associations for South Australia's tourism image, they will need to be better integrated within the communication platforms led by SATC and supporting tourism agents. Indeed, the Australia Council for the Arts (2020) reports that while daytrips and overnight trips for interstate arts tourism has consistently grown across Australia, South Australia performs slightly below the national average, with Victoria and New South Wales being leading performers. This suggests that the potential to market arts tourism across Australia exists, however, other states lead with a more integrated arts and tourism image when compared to South Australia.

Overall, the discussions around tourism marketing have leveraged arts festivals from two perspectives. The first perspective utilises arts festivals as a component of the broader tourism offering of South Australia. This may not see a strong direct relationship between arts festival organisers and tourism, as arts festivals become more ambient components for tourists rather than the primary motive to travel. The second perspective suggests that arts festivals could, indeed, become primary motives for targeted interstate tourists, with international tourism re-evaluated once the pandemic is over. This is possible when the arts festival offers an exclusive experience that is not available in other markets. The Mozart opera from Berlin is one such example that drives interstate tourism, while the Adelaide Festival brand drives tourism from Asian source markets. While some arts festivals, such as the Fringe, can rely on their overall appeal as the second largest of its kind globally, others may need to explore more exclusive artists and programming that drive the attention of tourists and national or international media. Moreover, the tensions between arts festival and tourism leaders in South Australia need to be addressed in order to tap into the potential tourism impact and image development that can be realised through

collaboration. Nonetheless, it is important not to limit arts festivals to a tourism perspective only, but rather review the value they can drive for other stakeholders (e.g., artists) as well.

Glocalism

Glocalism, in relation to arts tourism, comprises of four key perspectives, (i) distinctiveness of place and people (i.e., the local) and global opportunities for South Australian artists and arts companies; (ii) balancing arts festival content to cater to a mix of local and international needs; (iii) determining when to focus on local artists and content and when and to what extent to shift to international artists and content, with a new world order created by COVID-19 and a growing sense of national identity linked to glocalism; and (iv) when and how to focus on attracting domestic festival goers and international festival goers. Traditionally, arts festivals have provided exposure and access to international markets for artists and the creative sector. Exposure to international arts can contribute significantly to the development of artists and their careers. As one established South Australian artist discussed:

> Every two years we travelled due to my husband's career. But I knew wherever we went, I could learn more about [my art form.] While in Oxford, I wrote to three most famous artists in [my field,] and I learnt from them… I got those bonuses through travel to other countries. I turned a perceived negative into a positive. (Carolyn, an established artist)

While the artist had the opportunity to travel due to personal circumstances, many emerging artists may not have adequate funding to gain exposure across national or international markets. Since the pandemic hit the world, international travel has not been possible, nor does it seem attractive, at least for the short to medium term. By hosting established artists and international artists, arts festivals have provided significant networking opportunities for local emerging artists to learn from. As one theatre director suggested:

> If I, and other industry people who were in town, were handpicked and then taken so that we could support some arts networking that isn't necessarily always available to independent artists. Particularly for regional artists. Because, the focus on that event was on regional artists who often struggle to get recognised.

> Australia works in a very centralised way, like city focused, particularly in Adelaide. Not so much in Victoria and in New South Wales, I think. (Riley, theatre director)

But such opportunities will need to be re-evaluated with health and well-being at the forefront of people's minds. While some arts festival goers may be reluctant to venture out to crowded festivals due to the fear of the pandemic; for other arts festival goers attending an arts festival contributes to their mental well-being. Another early career artist highlighted that participation in arts festivals was not usually about income, but also about exposure and a sense of pride:

> I've been to the San Diego festival, which is really random but… we didn't get any funding so that was also unpaid… [My main motivation is that] the festival gives you an end goal for a project that you're working on. Generally, you have to register in advance for these festivals. So firstly, having an end goal for a project so you can have a finished work and say that you've done it; but also, you have that exposure. Which I guess you can have at any time but it's much harder to create something and get attention for it when there's nothing else going on. (Christine, an early career artist)

The role for arts festival planners then goes beyond mere economic and entertainment outcomes. Supporting artist development becomes an intrinsic outcome that festival organisers should plan for, but also, if planned strategically, arts festivals organisers can capture the data from such programs to justify funding from government, sponsors and philanthropy. Indeed, many arts festivals actively viewed this as part of their role in supporting artist development. As one arts festival director suggested:

> The value in tourism is all about metrics. That is difficult for [our festival] so, the arts as impact also need to be measured. Value doesn't speak to [tourism] metrics only, as far as I am concerned. They see value to be bed nights. But it is more than that. Our value is to see art works bought and people having unique experiences alone or in small groups… It is non-traditional art sales. Traders' associations, they see the value of [our festival] … We contribute to identity of South Australian

> residents. The festival is an artistic testing ground. It invites experimentation (Katherine, an arts festival CEO)

Some festival organisers highlighted the importance of networking with international associations personally in order to drive opportunities to collaborate with international artists. As one arts festival producer suggested:

> There are international venues, for example one of them is an incubator for [new artists in the genre]. I am also a member of [an international association]. It's based in the US, it's meant to be a global association, but is more US skewed. So that helps me try and land bigger names, because they can be really tricky to land. (Evie, Producer at a major arts festival)

While attracting international artists is an important aspect of festival planning, as this could also contribute to the "exclusivity" element for marketing the city and the festival; some arts festival organisers have actively organised programs to ensure the arts festivals as a platform for local artist development are more visible. More of the local element will occur in the near future, as health, well-being and travel remain uncertain. These elements are evident with the Adelaide Fringe's international arts marketplace named Honey Pot. The Honey Pot takes care of artists' and producers' health and well-being while at the same time providing opportunities for personal and professional growth. The Honey Pot allows artists to connect and showcase their work to over 250 industry delegates, while the program provides a space for arts "sector development, skills sharing and conversations" (Adelaide Fringe, 2020). As one festival director suggested:

> The fact that we're an export market is really important and that's something the [festival] does really well. It's hard for the government to think of arts as an industry. It is the creative industries and we have got definitely South Australian companies off the ground and launched them into their international touring. For example, *A Simple Space* without the Adelaide Fringe and the Honey Pot would have never gone on tour to dozens of festivals around the world… It's just to think about [festivals] as an export market for South Australian companies that actually employ artists and employ people. [The sector] has struggled to tell that story to the government. They

> don't think of the arts as an actual export industry, but it is. (Hillary, major arts festival CEO)

Indeed, the Honey Pot was cited by many artists as a great career opportunity, with some seeing it as an active platform to promote their work. As one artist suggested:

> "I use the Honey Pot at the Fringe. It provides great promotional opportunities for artists." (Eleanor, Artist)

What's worth noting, however, is that much of the emphasis by artists, when discussing the potential for international exposure, was limited to Adelaide's more established events. How will these opportunities be recast in future arts festivals, to take into account the new realities of a COVID-19 world? Adelaide Fringe is a great example of local opportunities as well as international opportunities. It has provided the opportunity to develop its positioning locally which has had an international impact, both physical and virtual, as one festival director commented:

> [The arts festival] injected quite a lot into the city ... bringing a lot of street art on the walls around Adelaide. National television shows covered it. Lonely Planet named Adelaide one of the top street art cities in the world. (Hillary, major arts festival CEO)

More virtual experiences will be needed as arts festivals move forward, as a 'smart' way to engage with audiences. Indeed, this has become evident in the both the arts and tourism sectors. For example, some national tourism boards are leveraging their digital channels as a means to engage and excite potential future visitors. Tourism Australia, for example has launched a "Live from Aus" campaign, scheduling live uniquely Australian travel experiences with experts, such as a "Mate date dinner party with Matt Moran" and a "Wine and Art Pairing with Chester Osborn at the d'Arenberg Cube." This is similar to the approach taken by Tourism Australia to exhibit tourism experiences. The international exposure for an artist comes back to the level of exposure the festival itself can drive locally and then promote virtually. This relates back to the importance of promoting the arts festivals to national and international audiences, and consistently developing and leveraging on Adelaide's "festival city" image, in innovative ways such as by virtual experiences. As one festival organiser suggested:

> Between that sense of it being part of Adelaide's identity and on the other hand recognition from other parts of Australia as that's the thing that Adelaide is good at, I'm bemused that we don't understand how that can contribute to a city's survival and development in quite complex ways… Adelaide is the second biggest festival city in the world. And yet we don't seem to have any comprehension of just how much that can do. (Richard, major arts festival CEO)

This suggests that while collaboration is an underlying theme that emerged from the interviews, there is a high level of interconnectivity between the themes as well. Tourism marketing can be a significant driver for localism and internationalisation of South Australian artists and arts festivals, driving inbound tourism as much as outbound creative development. One example of local support is the Major Festivals Initiative Commissioning Fund which is one means of 'making arts festivals happen.' Successful marketing, localism and internationalisation combined through an arts festival is, however, dependant on funding and knowledge sharing between tourism, arts and other government sectors to realise the potential value that can be delivered. This interdependency between the five themes is represented in Figure 3. The Figure illustrates the central role played by collaboration in the success of arts festivals in South Australia. However, collaborations between arts festival organisers and their stakeholders are relevant through the function knowledge sharing, tourism marketing, internationalisation and financial sustainability. The Figure summarises the key findings highlighted by participants in the study.

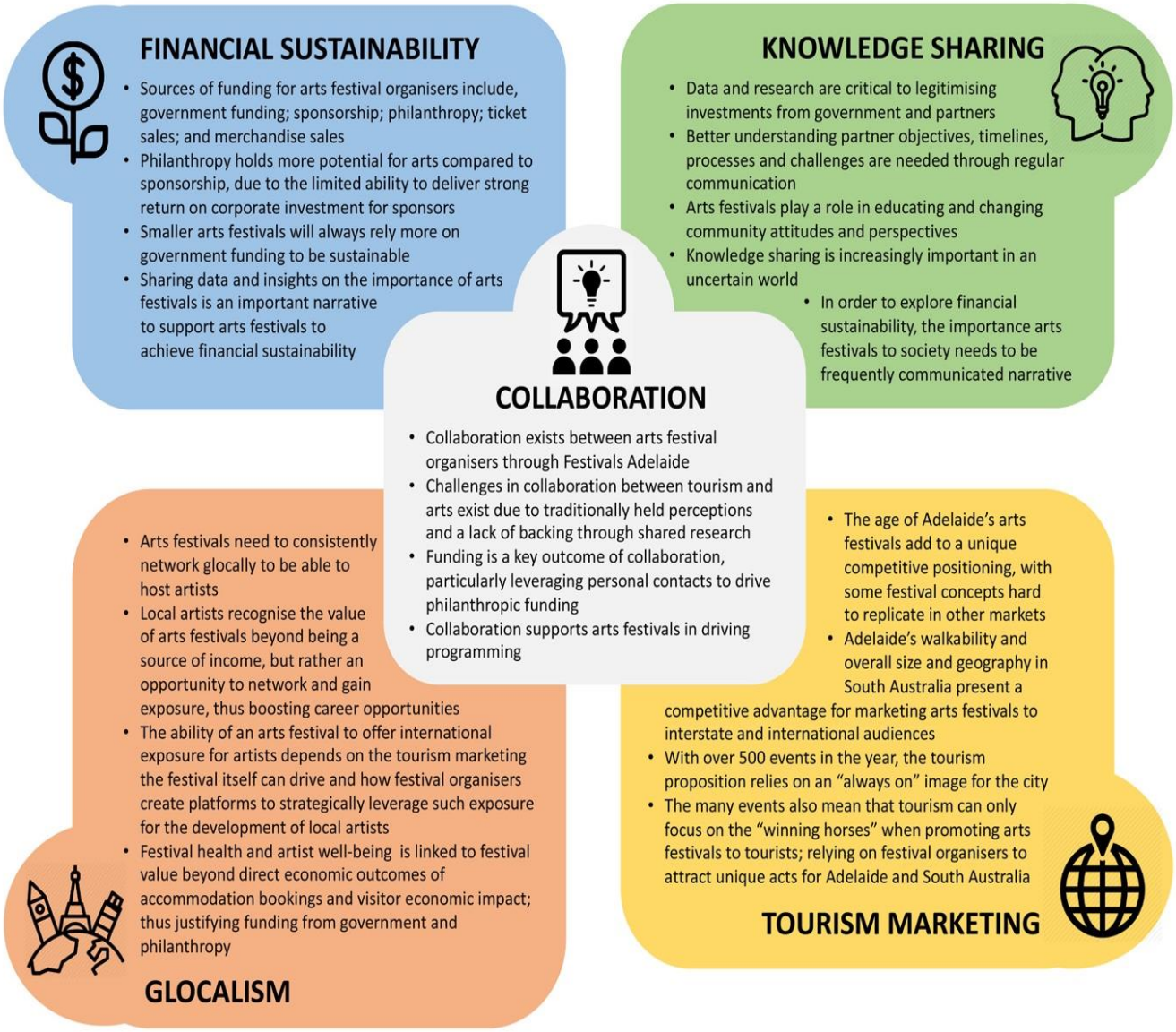

Figure 3 –Collaboration and arts festivals

Building on Andersson and Getz's (2007) model of the financial and non-financial relationships arts festival organisers manage, Figure 4 highlights the relationships that emerge from interview data. It illustrates how arts festivals function within a broader ecosystem. Key stakeholders as identified from South Australia's Arts and Culture plan and the Visitor Economy plan. While arts festival organisers are required to deal with many complex interdependencies, the Figure shows the ecosystem is centred around the artists and the creative vision and mission that arts festival directors seek to achieve through arts festivals.

This Figure provides an anchor for the findings reported from this study. As the Figure illustrates, the key components of the arts festival ecosystem entail individuals (e.g., artists), organisations (e.g., Fringe Festival, Adelaide Airport), institutions (e.g., Arts South Australia, South Australian Tourism Commission) and broader stakeholders (e.g., philanthropists) who provide networks, funding, content, knowledge and marketing support to the arts festivals. It is essential to understand the interactions between these players as they are integral to the development of the ecosystem. This is particularly important for arts festivals as part of the creative industries, where funding is a critical challenge, but can only be maximised through the success of overall dynamics of artists development, networking, content creation, knowledge sharing and marketing.

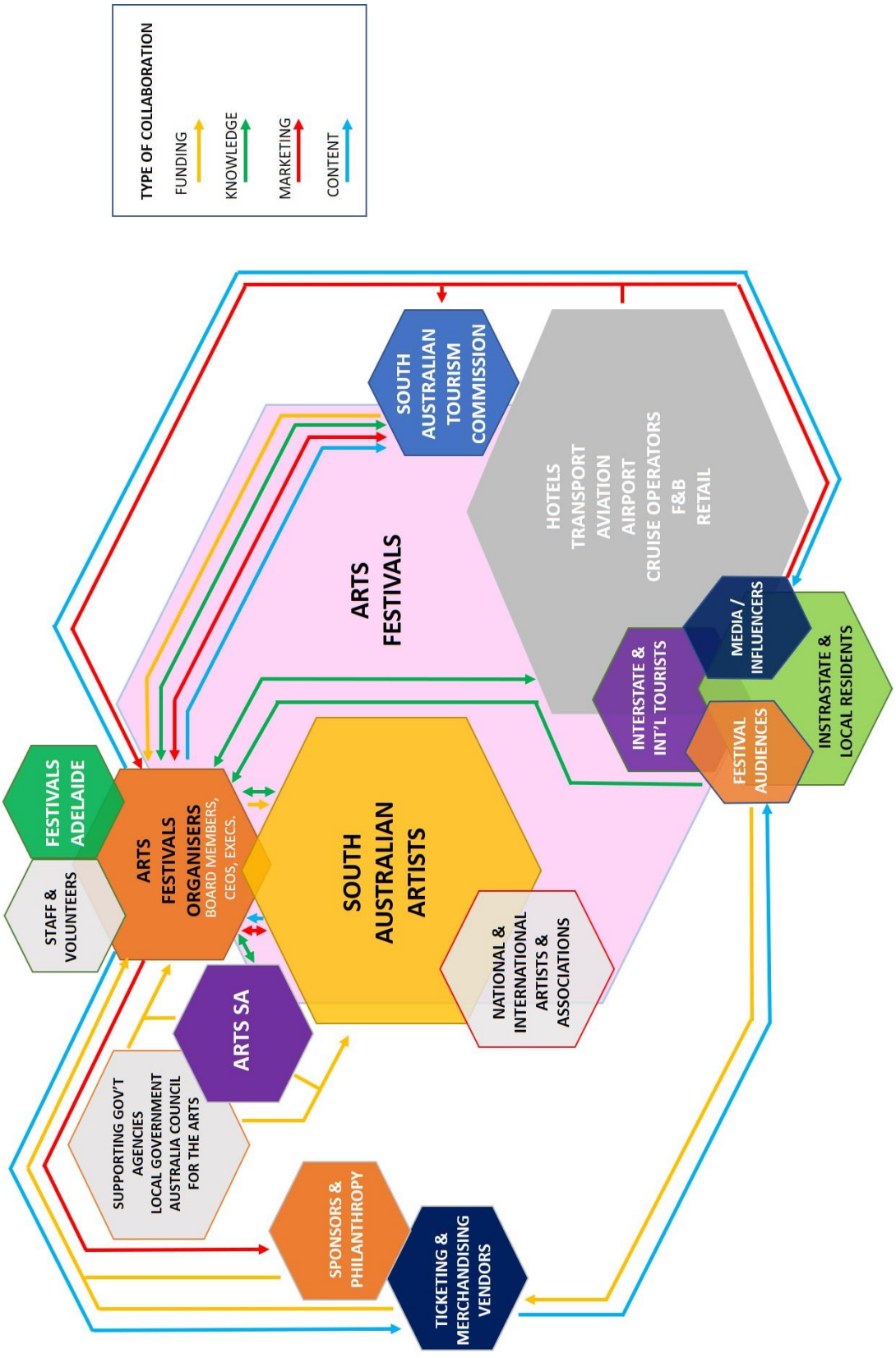

Figure 4 – Types of Collaborations within Arts Festivals Ecosystem

Conclusions and Recommendations

> ***THERE IS SUCH A RELIANCE ON SEEING THOSE [ECONOMIC] NUMBERS IMPROVE. THE OTHER SIDE OF THAT IS, WHERE'S THE ARTIST? HOW ARE THE ARTISTS FARING? IT'S BECOME A BEAST. IT'S BECOME A TOURISM DRIVER. (EVIE, PRODUCER AT MAJOR ARTS FESTIVAL)***

The role of collaboration is a primary theme echoed throughout by interviewees, namely, for Financial Sustainability, Tourism Marketing, Glocalism and Knowledge Sharing. The question remains, if collaboration is such an integrated theme across multiple areas of successful arts festival planning and delivery, why is it not already in place? As illustrated in Figure 4, the arts festivals ecosystem is complex. Indeed, each stakeholder group functions with their own set of broader objectives, timelines, budgets, resources and challenges. Key findings in this report show that the three top obstacles that restrict growth in audiences for arts festivals in South Australia are:

- Need for resources: Although stretched financially, teams of sufficient size, and contributing skills and time to the development of arts festivals, are crucial. Most arts festival organisers are operationally occupied, with very few able to take a wider strategic view of their ecosystem. Adequate team sizes that could contribute skills and time across multiple tasks. Limiting key resources limit arts festival organisers from gathering a wider strategic perspective.
- Need for better data management: One of the limitations of poor resources need for consistent data capture and reporting. If arts festival organisers have to fight for their share of the tourism marketing pie or gain financial sustainability through a variety of funding sources, further efforts need to be placed on research and data management within the context of South Australian arts festivals.
- Need for greater knowledge sharing: Most arts festival organisers and artists need skills and knowledge to enable them to be entrepreneurial and achieve financial sustainability. The scope of government's role requires a shift from a predominantly funding-focused to relationship-building then to education and training for arts

festival organisers to support them in how to achieve financial sustainability. Government and arts festival organisers play a joint role in educating the wider community on the economic and social benefits of the arts, enhancing the potential for sustainability, while providing opportunities for artist growth and development. Arts festival organisers and government can play an active role in training and facilitating networking opportunities for local artists to equip them with an entrepreneurial mindset to develop their careers.

These obstacles present clear challenges for the arts sector in achieving long-term growth. But also, the obstacles present a challenge for the tourism sector, as travellers continue to gravitate to the arts as a means to understand the essence of the places they visit. Hence, our first recommendation is that:

Recommendation 1

1. Expanding the role of Festivals Adelaide: Enable Festivals Adelaide Festivals Adelaide to facilitate greater collaboration between key stakeholders, especially, the two government agencies, Arts South Australia and South Australian Tourism. Enable Festivals Adelaide to provide stronger collaboration and communication with the many publics who are arts festival lovers or have the potential to be arts festival lovers, if they knew more about them through commissioning.

The post-COVID-19 world could have long-lasting effects on the consumption patterns of cultural tourists, leading to greater popularity for digital streaming of arts festival activities, high-end tourism, as well as a focus on health and well-being. As many (but not all) arts festivals pitch to the high-end tourism market, tourism marketing could better leverage arts festivals and its content. As noted, the high-end tourism market could be the first pick of interstate and international tourists, as airfares and costs related to travel are expected to rise after the COVID-19 pandemic. In such instances, a closer collaboration between arts festivals, artists and tourism agencies could be beneficial to the overall economy, its health and the image of the state.

In analysing the findings of this study, it was not surprising to uncover that numerous arts festival stakeholders required training and development in understanding tourism and philanthropy in order to be able to ensure their arts festivals benefit fully from the opportunities that they present for the state of South Australia. This is despite evidence that domestic tourists participating in arts activities represent 12% of total overnight stays to the state of South Australia (Australia Council for the Arts, 2020).

Furthermore, glocalisation of arts festivals remains under-developed for a number of reasons. First, the artists themselves need to gain knowledge and develop skills to operate micro-enterprises and become entrepreneurial. Some artists are already functioning entrepreneurially (e.g., those who travel internationally to other arts festivals around Asia, North America and Europe). But others have limited experience in how to develop as a micro-enterprise, nor do they recognise their arts career as a potential micro-enterprise. These artists need skills training and development opportunities so that they can support the creative industries in the state develop. Being tiny and independent, they often function on the 'smell of an oily rag' as do small arts festivals. On the one hand, they are agile and innovative, introducing new products to the market, as seen in open access arts festivals, such as the Adelaide Fringe and SALA. On the other hand, they are cash strapped, resource-poor and struggling rather than strategic. Therefore, freedom to make changes is restricted by these challenges.

Conflicting perceptions of audience demand by arts festival and tourism stakeholders caused the most tension in the ecosystem, according to our interviewees. While Australia-wide data support the exponential growth of arts tourism in recent years, there is misalignment between tourism and arts at a state level in South Australia. Geographic advantages in Adelaide and the wider South Australia are noted, presenting the opportunity to boost the impact of arts festivals by strategic initiatives that build capability of key players in the creative industries. Although tourism representatives consider arts festivals to be a valuable part of the tourism mix, arts festivals are viewed as ambient programming rather than hero events for positioning South Australia. This misalignment limits Adelaide's potential to capitalise and further emphasise its "festival city" status in the minds of potential visitors, whether tourists, locals or those from regions of the state.

The following recommendations are presented as a means to managing sector challenges:

Recommendation 2

1. Expanding the role of state government: As government looks to shift the arts sector's significant reliance on government funding to a more self-sustaining approach, government needs to recognise its role as guiding arts festival organisers through this financial transition. While some arts festival organisers have been successful in diversifying funding through experience, others require significant support and skills development in order to do so. Moreover, the government must lead the role in communicating the value of the arts sector to the wider community and growing a culture of philanthropy.

Recommendation 3

2. Expanding the role of arts festival organisers: Working closely with government, arts festival organisers must look to means of justifying their own "social licenses" to operate within society. Communicating the value of the arts is needed not only from a social standpoint but also from an economic standpoint. This in turn would encourage philanthropy from local businesses, foundations and individual community members for arts festivals and artists. Consistent with the role of government, arts festival directors and their boards further owe it to the local artists to ensure their arts festivals provide adequate training, skills development and opportunities to allow artists to be entrepreneurial.

Recommendation 4

3. Expanding the role of state tourism agency: The report presents the state's tourism agency as a key stakeholder for collaboration, if arts festivals are to realise their full tourism potential. The tourism agency, however, must lead in actively diversifying the state's tourism marketing strategy with by including the arts, not merely as an ambient activity, but recognising some of the major arts festivals as key brand associations. Such marketing diversifications will capitalise on the growing cultural tourism trends in Australia and better communicate the breadth of the state's tourism offering.

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