



Final Report

Stockton International Riverside Festival 2018

Updated 2nd May 2019

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Executive summary

Introduction and methodology

- Bluegrass Research was commissioned to undertake research to evaluate Stockton International Riverside Festival (SIRF) 2018, the fourth consecutive year we have evaluated this event for Stockton Borough Council.
- As in previous years, the **main objectives** of the evaluation were to:
 - provide the Council with an understanding of the audience at SIRF 2018
 - measure satisfaction with aspects of the visitor experience and perceptions of SIRF 2018
 - consider the Direct Economic Impact of SIRF 2018
- The research involved **face-to-face interviews** conducted 'on-street' with a sample of the audience at various points across the festival. Interview shifts were conducted each day between Thursday 2nd and Sunday 5th August 2018. These on-street shifts generated an **overall sample of 356**.
- An online version of the survey was created and promoted by Stockton Borough Council, launching on 7th August. In total **164 responses** were received online.
- The data from the face-to-face and online versions of the survey have been merged to provide a **total sample of 520**. This paper provides headlines from this data, comparing results with 2017 where relevant throughout.

Key findings

The audience

Origin

- The **majority of the audience at SIRF 2018 were from Stockton Borough [71%]**, defined in this report as '**Residents**' **[2017: 70%]**
- The remaining respondents **[29%]** were **Non-Residents** of Stockton Borough. There was a marked increase this year in visitors from outside of the North East, coming from other areas of the UK, as shown below:
 - Elsewhere in **Tees Valley 12% [2017: 12%]**
 - Elsewhere in the **North East 8% [2017: 12%]**
 - Other areas of the **UK 8% [2017: 4%]**
 - **Overseas 1% [2017: 1%]**



Age

- There was a **good spread of ages** in the sample, in similar proportions to last year:
 - The **most populated age group was 30-49**, accounting for over two in five **[44%]** of the sample **[2017: 41%]**
 - a fifth **[20%]** were aged **16-29 [2017: 23%]**
 - nearly a third **[31%]** were aged **50-69 [2017: 31%]**
 - **5% were 70 or older [2017: 5%]**

Group composition

- The **majority [83%] were attending with someone [2017: 82%]**. Group composition is summarised below, showing an increase in the proportion who attended in larger groups and a decrease in groups of two:
 - **17% Attending alone [2017: 18%]**
 - **15% Group of 2 [2017: 26%]**
 - **20% Group of 3 [2017: 18%]**
 - **26% Group of 4 or 5 [2017: 23%]**
 - **23% Group of 6+ [2017: 15%]**
- **Half [50%]** were **attending with a child or children** – a significant increase on 2017 **[2017: 42%]**

Gender and ethnicity:

- **69% female; 31% male [2017: 64% female, 36% male]**
- **94% of the audience was White British [2017: 96%]**
- **69% were in work / education [2017: 72%]**

Audience composition

- As already established, the audience splits into approximately **71% Stockton Residents** and **29% Non-Residents** from outside the Stockton Borough area
- The **majority [90%]** of the SIRF 2018 audience were on **'day'** rather than **'overnight' trips [2017: 94%]**. **10%**, however, **incorporated an overnight stay** away from home in their trip to the Festival **[2017: 6%]**. This rise in overnight stays perhaps reflects the significant increase in visitors from outside of the North East this year



- Across the total sample the audience broke down as below:
 - **70% were Residents of Stockton Borough on a Day Trip**, with only three Stockton Residents staying overnight, representing only **0.6%** of the total sample *[2017: 70%]*
 - **20% Non-Residents on a Day Trip** *[2017: 25%]*
 - **10% Non-Residents staying overnight** *[2017: 5%]*

Awareness of and engagement with SIRF 2017

- **Almost all [99%] were aware** that the event they were attending was part of SIRF 2018 *[2017: 99%]*
- All of the sample were aware of SIRF more generally, and **88%** of the respondents **had been to SIRF in previous years** *[2017: 86%]*. Those who had been to SIRF before were asked when their last visit was: **79%** of those returning audience members had been at SIRF last year *[2017: 72%]*
- Furthermore, closely in line with last year's responses, **a quarter [25%]** had been to **between 6 and 10 previous SIRFs** *[2017: 24%]*; and a further **two in five [42%]** had attended more than 10 SIRFs in the past *[2017: 43%]*
- The 2018 SIRF audience was more engaged with arts and cultural events than in 2017, with the **majority [94%]** *[2017: 88%]* saying they enjoy events of this type:
 - **51% had attended arts and culture events in the past six months** *[2017: 39%]*
 - **A further 28% had attended in the last year** *[2017: 31%]*
 - **15% had not attended arts and culture events for more than a year** *[2017: 18%]*
- The **remaining 6% are not typically interested in arts and culture** and do not usually attend this type of event *[2017: 12%]*
- Attendees' **main motivations for attending the Festival** are similar to last year, although a significant increase in wanting *to spend time with friends and family* is highlighted:
 - **to spend time with friends and family 34%** *[2017: 21%]*
 - **to be entertained 25%** *[2017: 28%]*
 - **to enjoy the atmosphere 13%** *[2017: 13%]*



- When asked **how they had heard about the event**, there were several **influential channels of communication**:
 - **31% word of mouth [2017: 34%]**
 - **26% SIRF Facebook ['Facebook' 2017: 25%]**
 - **14% Stockton News [2017: 12%]**
 - **12% local newspaper/magazine article or advert** [*Evening Gazette*; *Northern Echo*; *Newcastle Chronicle / Journal*; *Sunderland Echo*; *Shields Gazette*; *Hartlepool Mail*; *Yorkshire Post*; *The Crack Magazine* **2017: 11%**]
 - **11% brochure in a public place [2017: 8%]**
 - **10% outdoor banners [2017: 7%]**
 - **9% SIRF Website [2017: 13%]**
 - **9% Stockton Borough Council Website [2017: 7%]**
 - **8% Rediscover Stockton Shop [2017: 5%]**
 - **6% were just passing [2017: 10%]**
 - **6% leaflet through door [2017: 7%]**
 - **5% Stockton Spring Summer Events Guide [2017: 4%]**

Satisfaction with and perceptions of SIRF 2017

- Respondents were asked to rate various aspects of their experience of SIRF 2018 and were **generally very positive**, with a substantial majority **[93%]** this year rating the **'whole experience' as positive** higher than in 2017 **[2017: 87%]**, a return to the level seen in 2016 [92%]
- Specific aspects of the Festival attracted the following ratings:
 - **Quality of event: 90% positive [2017: 84%]**
 - **Ease of physical access around the events: 89% positive [2017: 90%]**
 - **Publicity for the festival: 80% positive [2017: 75%]**
 - **Signage to the events: 76% positive [2017: 77%]**
- Levels of positivity about the Festival are also reflected in the wider perceptions:
 - **92% agree that the Festival is good for promoting Stockton as a place to live, work or visit [2017: 92%]**



- **89% agree the Festival is a good use of Council resources [2017: 91%]**

Expenditure

- The report considers level of expenditure at SIRF 2018, using data generated from the research. This expenditure data shows the total and average expenditure by Residents and Non-Residents across the range of expenditure categories, noting that not all of this can be considered as additional to the local economy and does not therefore constitute Direct Economic Impact attributable to the event
- The **overall** average rate of expenditure at SIRF 2018 was **£20.52** per person. This year, **Residents** spent on average **£16.20** at the event, compared to **Non-Residents** who spent **£30.89**

Note: We asked how much those attending had spent on travel both within Stockton and the wider region for reference. Although spend outside of Stockton cannot be included in calculations of Direct Economic Impact on Stockton itself, as an indication, inclusion of expenditure on travel outside of Stockton increases the overall spend per person to £21.88.

Calculating Direct Economic Impact

- Following the principles of 'EventImpacts', a recognised methodology for calculating economic impact of events, Bluegrass has calculated the Direct Economic Impact attributable to SIRF 2018
- Core to this methodology is the importance of distinguishing between 'qualifying' and 'non-qualifying' expenditure, on the basis that not all expenditure by the audience can be included in the Direct Economic Impact calculation, as some of it:
 - **would have occurred anyway** and/or
 - **is not attributable to SIRF 2018**
- Considering only **'qualifying' Residents and Non-Residents, the overall average rate of expenditure at SIRF 2018 was £24.98 per person**, up from **£21.57 in 2017**
 - Qualifying Residents: **£17.26 in 2018**, similar to £17.05 in 2017
 - Qualifying Non-Residents: **£32.00 in 2018**, up from £25.77 in 2017
- The **average spend per person on each category**, still considering only 'qualifying' respondents, is shown below, and highlights that, as in 2017, *eating and drinking* represents the highest spending category



	2018	
Eating and drinking	£	12.41
Shopping	£	4.30
Entertainment	£	0.92
Travel and Transport	£	1.14
Accommodation	£	4.63
Other	£	1.58

- Stockton Borough Council provided an **estimated crowd size of 65,500** for SIRF 2018. Based on this, and the **proportions of audience types** and their **average spend** and including an estimate of expenditure by Stockton Borough Council on hospitality for artists and performers, **Direct Economic Impact has been estimated at £944,131.**

A note from Stockton Borough Council on estimating audience numbers

Stockton Council has attempted to strengthen its method for calculating audience sizes and visitor numbers at its major events by introducing an estimated audience size for each separate event location or site and for each day or part day session. Where locations allow, these estimates are correlated with footfall counter data, which measures numbers of people in a given space, rather than audiences for an event in that space. This produces a total audience estimate which is expressed as a range to allow a margin of error. In 2018 the estimated range was 63,000 to 68,000. Bluegrass have taken a mid-point from the range to calculate the economic impact.



Introduction

Objectives of the evaluation

The research aimed to provide the organisers of Stockton International Riverside Festival with:

- an understanding of the audience at SIRF 2018
- a measurement of satisfaction with aspects of the visitor experience and perceptions of SIRF 2018
- a calculation of the Direct Economic Impact of SIRF 2018 on Stockton Borough

Specifically, the research with the festival audience sought to provide the organisers with information on:

Profile of the Audience

Relationship with SIRF

Nature of trip

Satisfaction with and perceptions of SIRF 2018

Audience composition

Expenditure

Direct economic impact

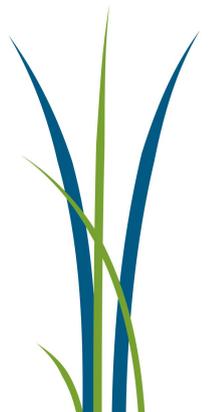
Methodology

The research involved **face-to-face interviews** conducted on-street with members of the audience, randomly sampled, during the festival. Interview shifts were scheduled to coincide with key events in the programme, and were conducted at Riverside, Trinity Green and High Street across the 4 days of the festival, achieving a total of **356 interviews**.

The interview lasted an average of approximately 9 minutes, increasing from around 7 minutes last year with slight changes to the questionnaire; the questionnaire is included in Appendix 1.

Additionally, an **online survey** was created, launched on 7th August, using the same questionnaire, and disseminated by the team at Stockton Borough Council. This online survey generated a total of **164 responses**.

An **overall combined sample of 520** was therefore achieved.



Reporting statistics

Significance testing

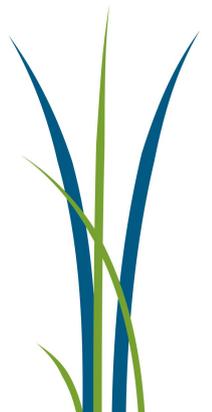
Statistical testing has been undertaken to a 95% confidence level, to identify differences in results between 2018 and 2017. The statistical formula used to assess whether statistical differences exist takes into consideration the “margin of error”: a statistically derived +/- figure. The margin of error states that if the survey was repeated 100 times, the result would lie within this range at least 95 times out of the 100.

Where there is a statistically significant change between 2017 and 2018, significantly higher findings are highlighted in **red**, significantly lower findings are highlighted in **blue**

Rounding

All calculations are made in full statistical tables using actual figures, while the tables and charts in this report show the rounded figures. It is therefore the case that some ‘summed’ numbers may differ slightly if the numbers in the charts are manually calculated.

NB All data is rounded to the nearest whole percentage point, which can result in apparent differences when values are summed.



Research findings

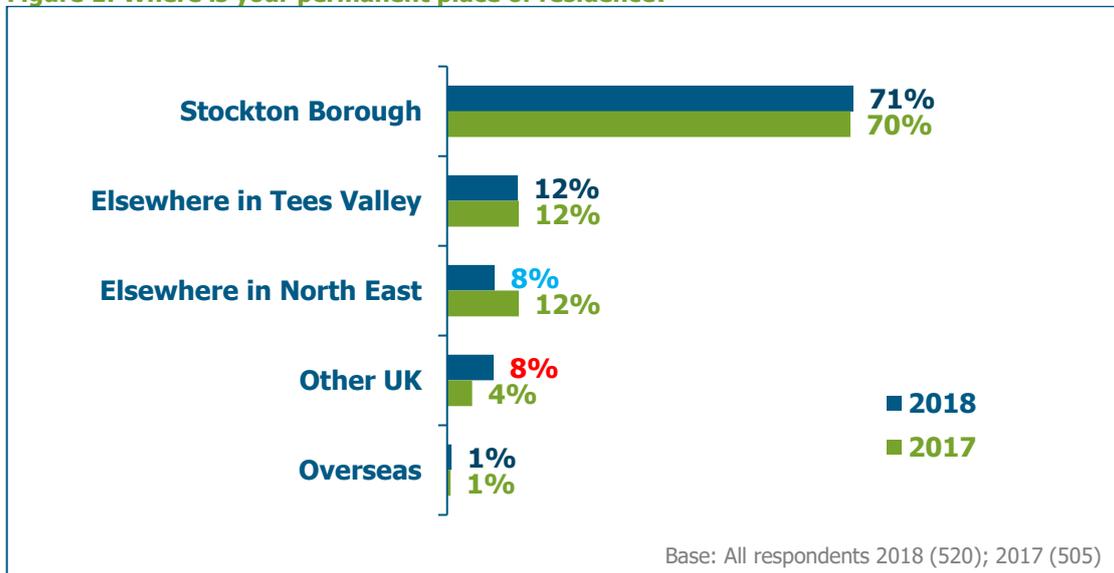
Profile of the Audience

Profiling data collected as part of the survey provides a breakdown of respondents' *origin, gender, age, employment status, ethnicity, disability status* and *group composition*. The findings are summarised below.

Origin

Figure 1 shows respondents' permanent place of residence for 2018 and, for comparison, 2017. The **majority [91%] of respondents reside in the North East region**; over two thirds **[71%] in Stockton Borough itself**. There was a marked increase this year in visitors from outside of the North East, travelling from other areas of the UK **[2018: 8%; 2017: 4%]**

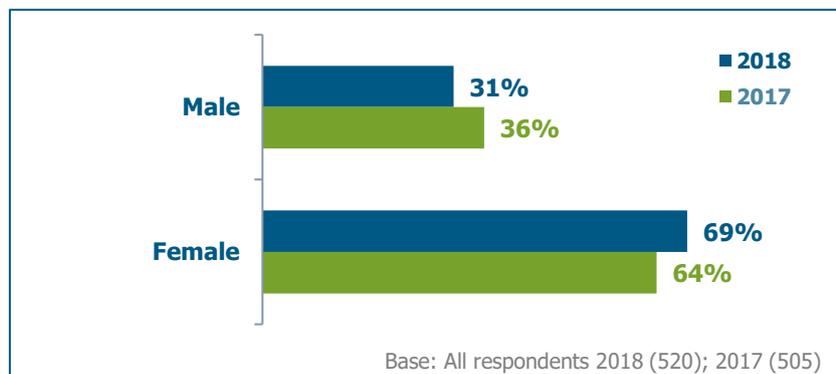
Figure 1: Where is your permanent place of residence?



Gender

The sample was composed of over **two thirds female [69%]**, with a slightly further leaning this year towards women. In 2017, **64%** were female and **36%** male.

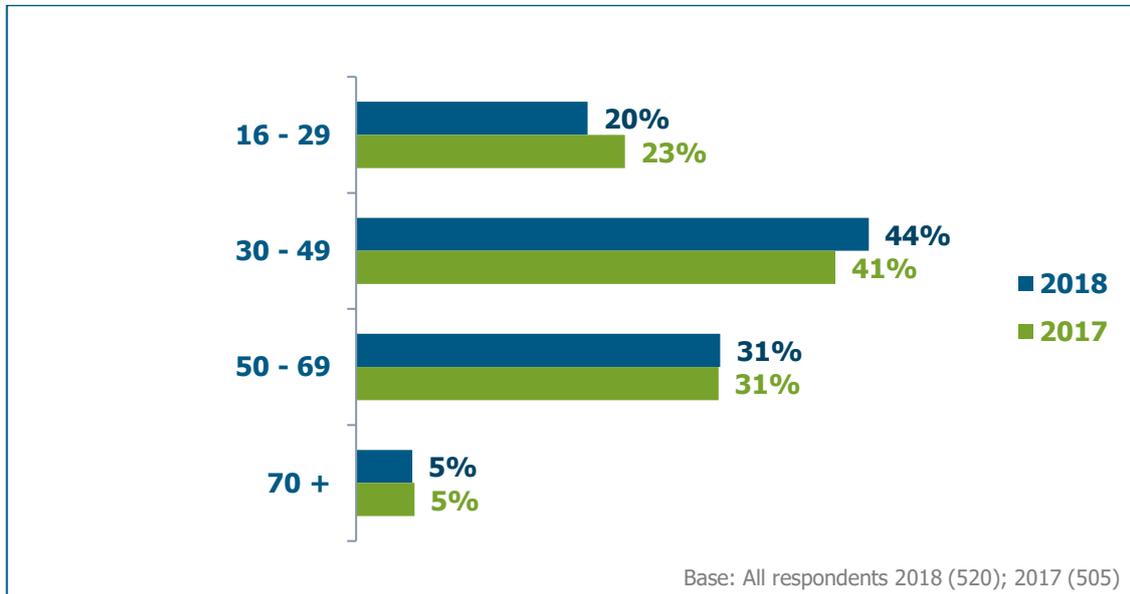
Figure 2: Gender



Age

There was a **good spread of ages** in the sample with, as with last year, the **majority of the sample populating the 30 to 49 age group [44%]**. The spread across the age categories is illustrated in Figure 3 below.

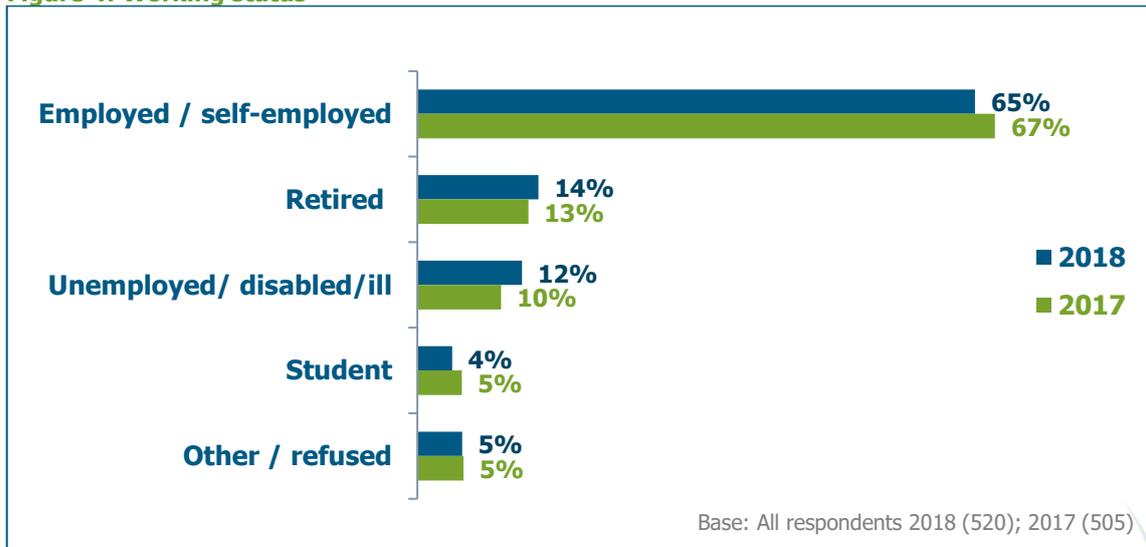
Figure 3: Age



Employment status

In similar profiles to 2017, the majority of respondents, two thirds overall, were **employed [65%]**. Only very slight shifts across the working status categories were registered in the data compared to last year.

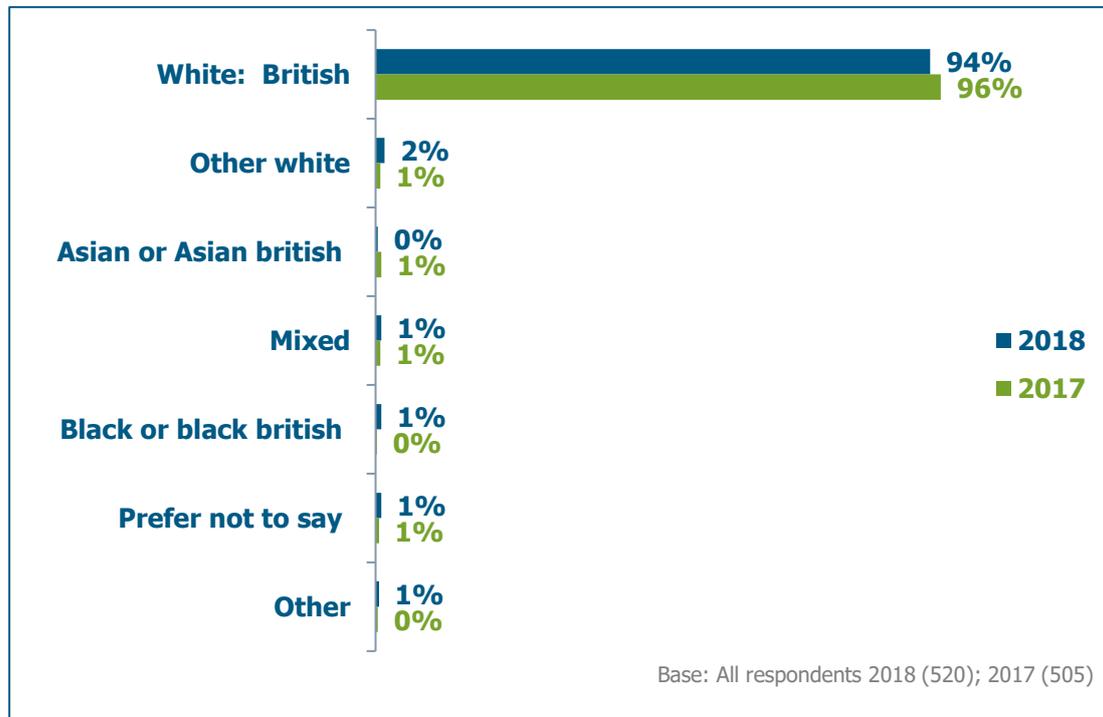
Figure 4: Working status



Ethnicity

A similar proportion to last year, a **majority of the sample [94%]**, reported that they considered themselves to be **White British**.

Figure 5: Ethnicity



Disability

Respondents were asked if their own activities, or those of any member of their party, were limited because of a long-term illness. Although the **majority remain unaffected**, whether that be **themselves [85%]** or **other members of the party [85%]**, these proportions has lessened compared to last year, with a notable **increase in the minority proportion [10%]** that reported that their **activities were limited a little**.

Figure 6: Are your activities limited because of a disability which has lasted, or is expected to last, at least 12 months?

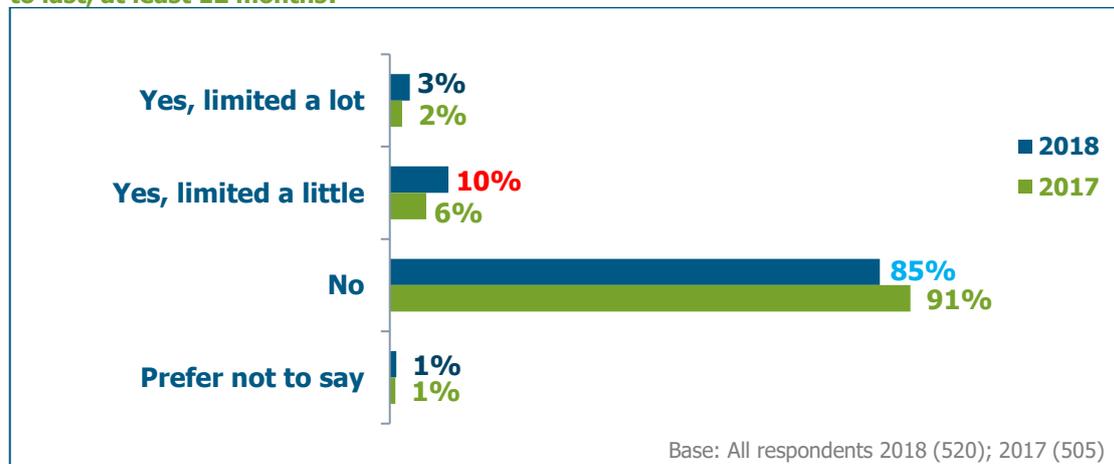
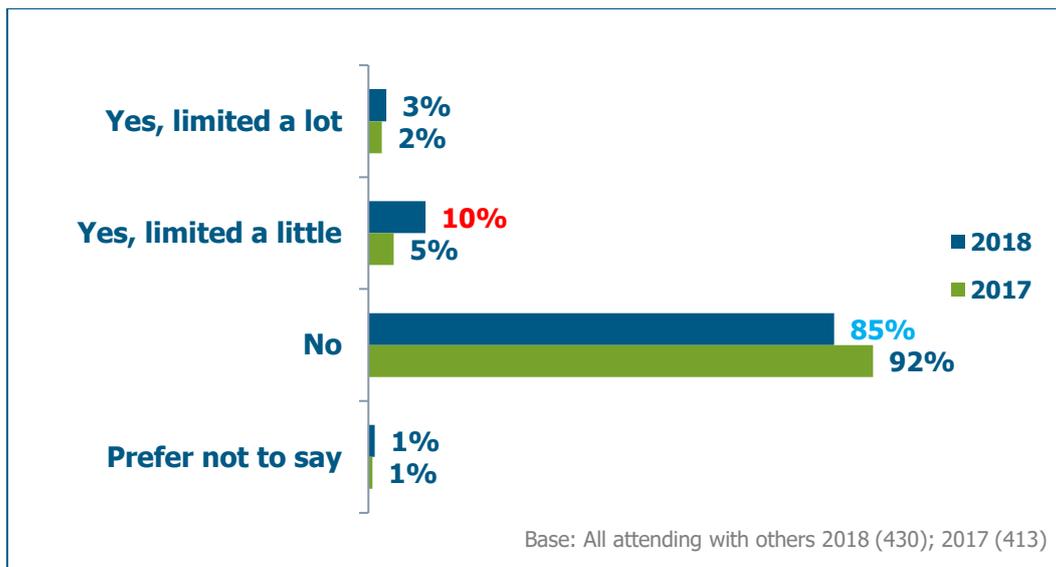


Figure 7: Are the activities of other members of your party today limited because of a disability which has lasted, or is expected to last, at least 12 months?



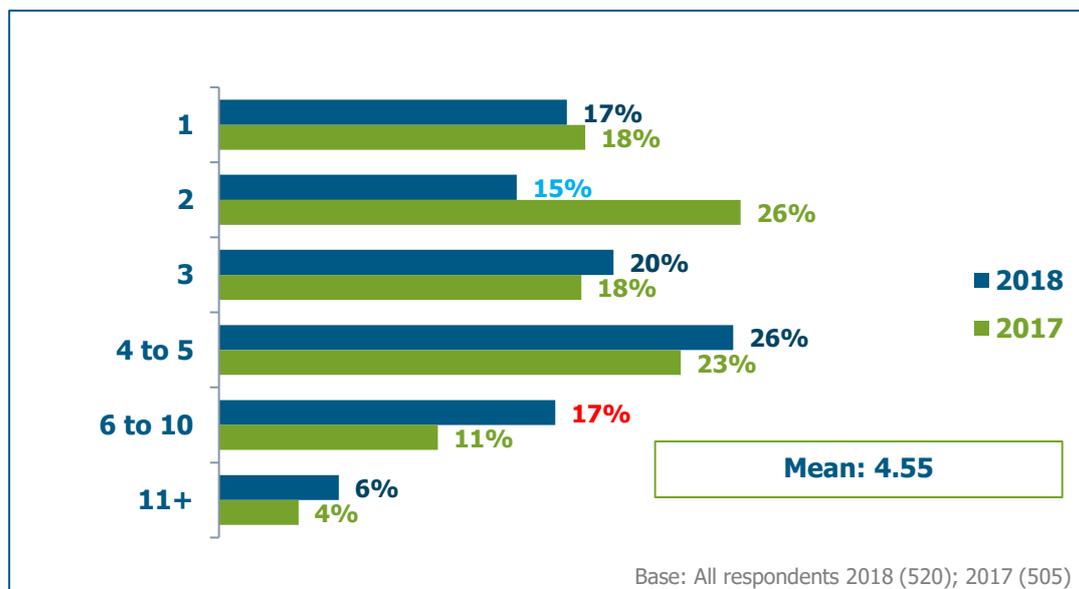
Group composition

The mean group size in 2018 was **4.55**, growing from last year's **3.68**.

The **majority [83%] of respondents were attending with someone [2017: 82%]**. The **most common group sizes were 4 to 5 [26%] and 3 [20%]** together representing nearly **half of the sample**.

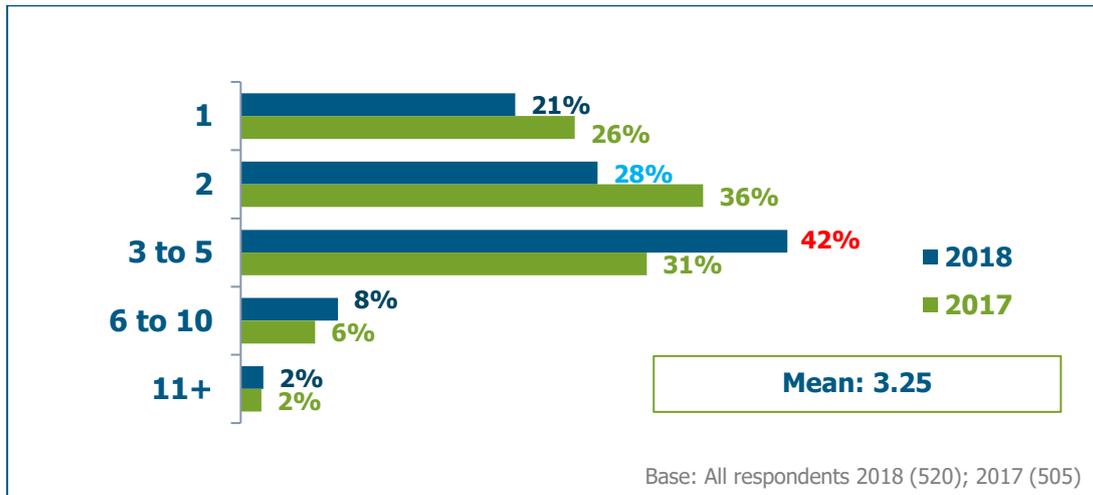
The results indicated a slightly greater variation in group sizes with a notable decrease in people attending in groups of two, with increases observed in group sizes higher up the scale.

Figure 8: Total group size



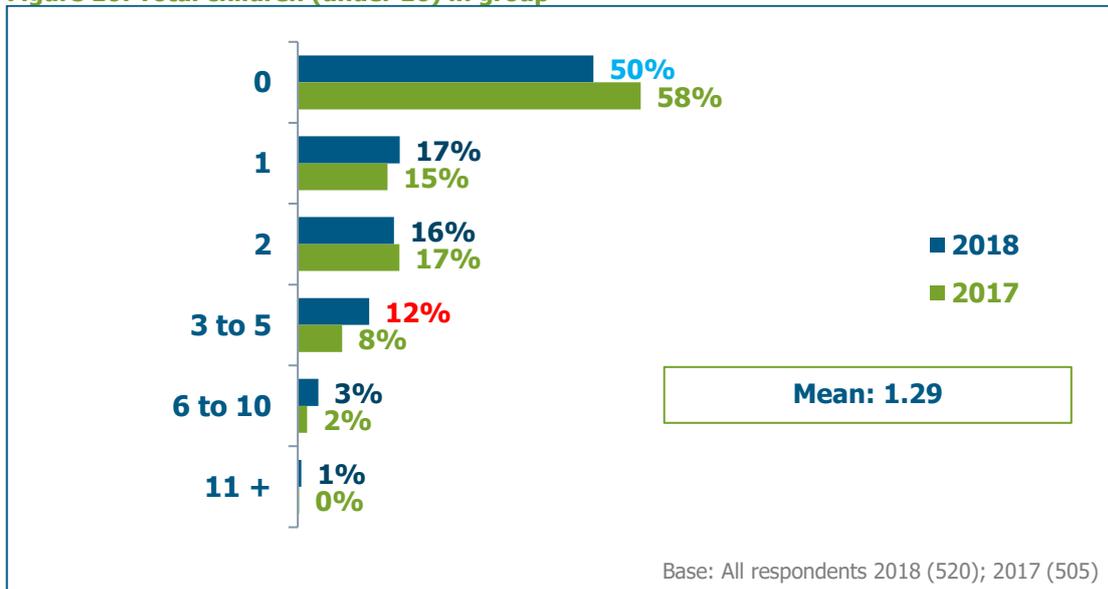
As illustrated in Figure 9, there was an increase in groups of 3 to 5 to **42%** [~~2017: 31%~~], with this year a decrease from **61%** [~~2017~~] to **49%** [~~2018~~] of groups having 1 to 2 adults.

Figure 9: Total adults (16 or over) in group



The proportion of groups without children represented a decrease on last year to a half of the total sample.

Figure 10: Total children (under 16) in group



The analysis of group composition highlighted a general increase in group sizes with a greater quantity of larger groups and a slight shift away from visitors attending in pairs. **The mean group size increased from 3.68 to 4.55.**



Relationship with SIRF

This section's findings consider: *levels of awareness* of the wider festival; exposure to *communications activity*; history of *visiting previous festivals*; and *motivations for visiting SIRF*.

Awareness of the festival

First, the levels of the awareness of the festival were established: respondents were asked if they were aware of the festival and if they had deliberately chosen to attend.

As with last year's respondents, the **vast majority [99%] were aware that the event they attended was part of the Stockton International Riverside Festival**. Everyone asked was aware of the wider Festival itself.

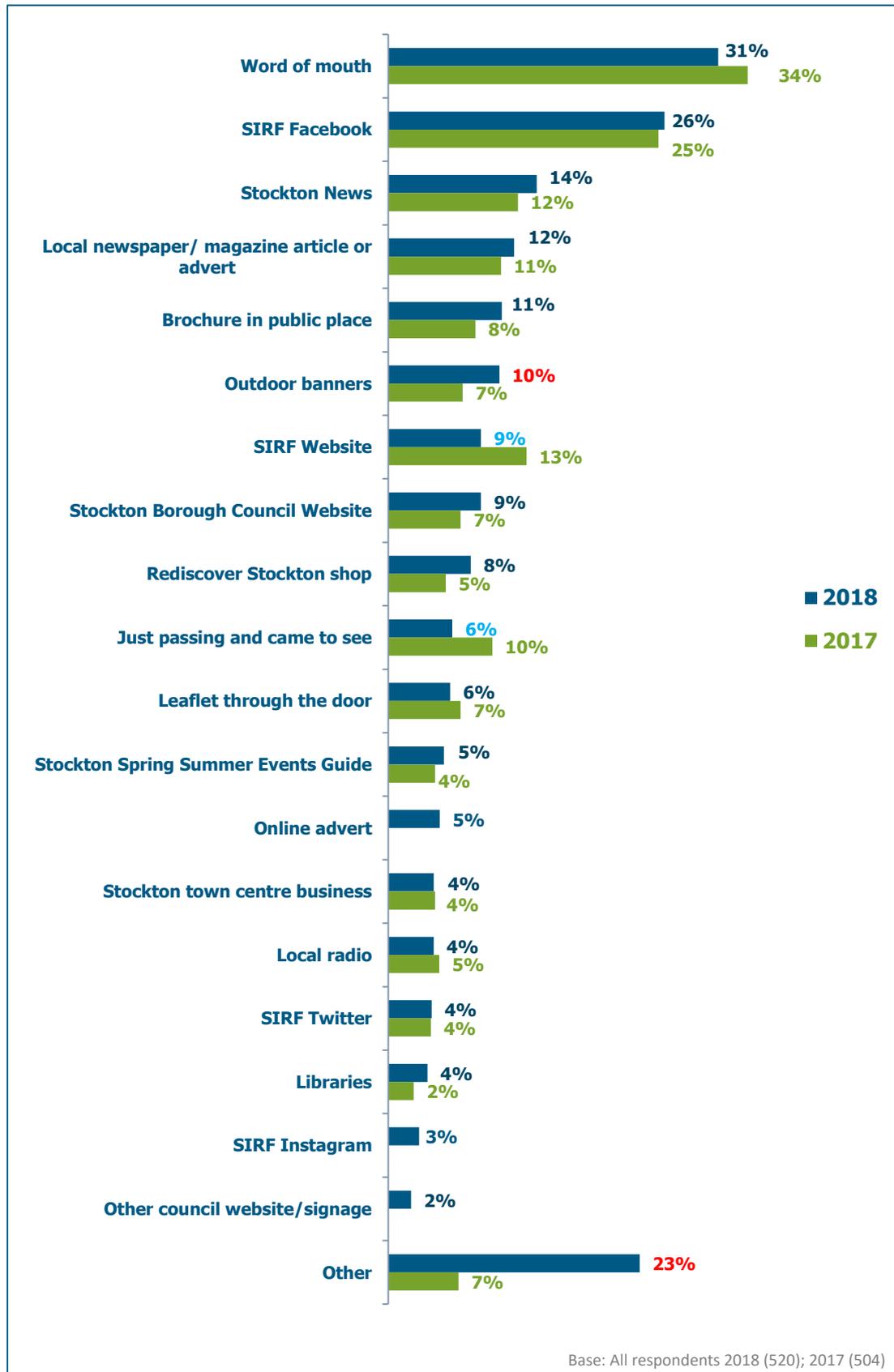
Communications

How respondents had heard about the event they were attending is shown in Figure 11. The broad distribution of responses indicates that there **several influential channels of communication**. Alongside an appreciation of this variety, it is notable that there was an increasing role of *outdoor banners* [10%], as well as the decreasing role of those attendees who were *just passing and came to see* [6%] and that, as was the pattern in 2017, the force of the *SIRF website* [9%] as a source of communication reduced again.

(NB Although they appear as minor influences, 'Online Ad', 'SIRF Instagram' and 'Other council website / signage' are illustrated overleaf but were not named options in 2017. Furthermore, a closer investigation of those responding 'Other' to this question exposed multiple references to previous and regular attendance to the Festival in other years. 'Prior knowledge' was removed as a named option in the questionnaire, a change in the methodological approach that may account for the very marked increase in responses under 'Other'. Moreover, the organisation of named options changed this year, with 'Local newspaper / magazine' incorporating 'Evening Gazette', 'Northern Echo', 'Newcastle Chronicle / Journal', 'Sunderland Echo', 'Shields Gazette', 'Hartlepool Mail', 'Yorkshire Post', 'The Crack Magazine', which were last year individually named for respondents. This is similarly the case for 'Local radio' ['BBC Radio Tees'; 'Heart/Capital Radio'].)



Figure 11: How did you hear about the festival?



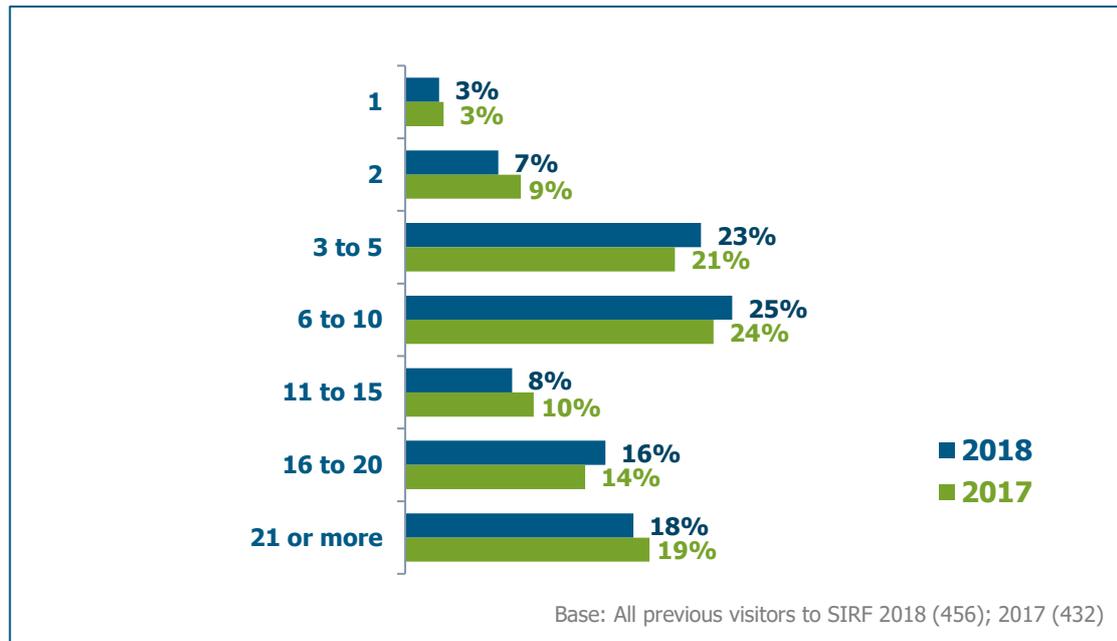
Visits to previous festivals

Respondents were asked about their history of visiting SIRQ in previous years.

The vast majority [88%] had visited SIRQ before, as in 2017 [86%].

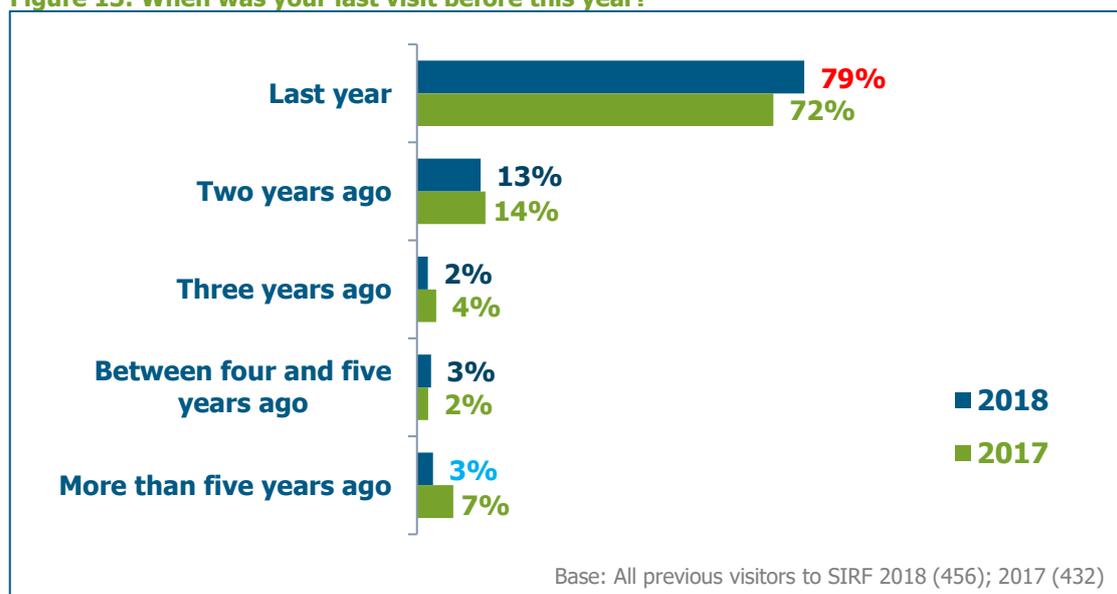
Those who had visited before had typically been to several previous SIRQs – around a half [48%] had been to **between 3 and 10 previous festivals**, whilst **a just under a fifth [18%]** had been to **21 or more previous SIRQs**.

Figure 12: How many SIRQ festivals have you visited before?



Over **three quarters of previous visitors to SIRQ [79%]** reported that they had visited SIRQ 2017 last year, illustrated by Figure 13 below.

Figure 13: When was your last visit before this year?

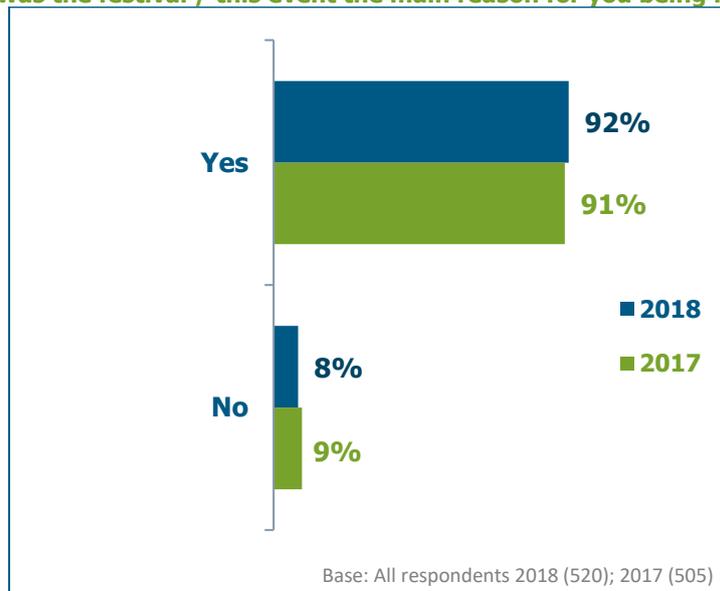


Main reason for visit

It is important when considering the Direct Economic Impact of the event to understand the proportions of the audience for whom the festival was the main reason for their visit to Stockton that day and who would otherwise not have been present in the town.

The findings show that a sizeable **majority [92%] were in Stockton for the event**, a similar proportion to last year.

Figure 14: Is / was the festival / this event the main reason for you being in Stockton?



Motivations for visiting SIRF

Those aware of SIRF were asked their motivations for visiting the festival. Findings suggest that although a variety of influences persist, respondents selected '*To spend time with friends/family*' [34%] in greater proportions this year, with '*to be entertained*' [25%] diminishing a little as a principle motivation. Slight shifts in the broader picture are illustrated by Figure 15 across the page.

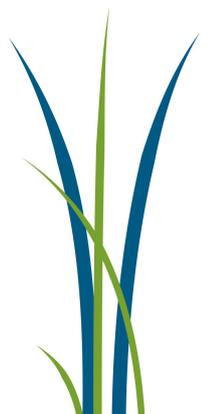
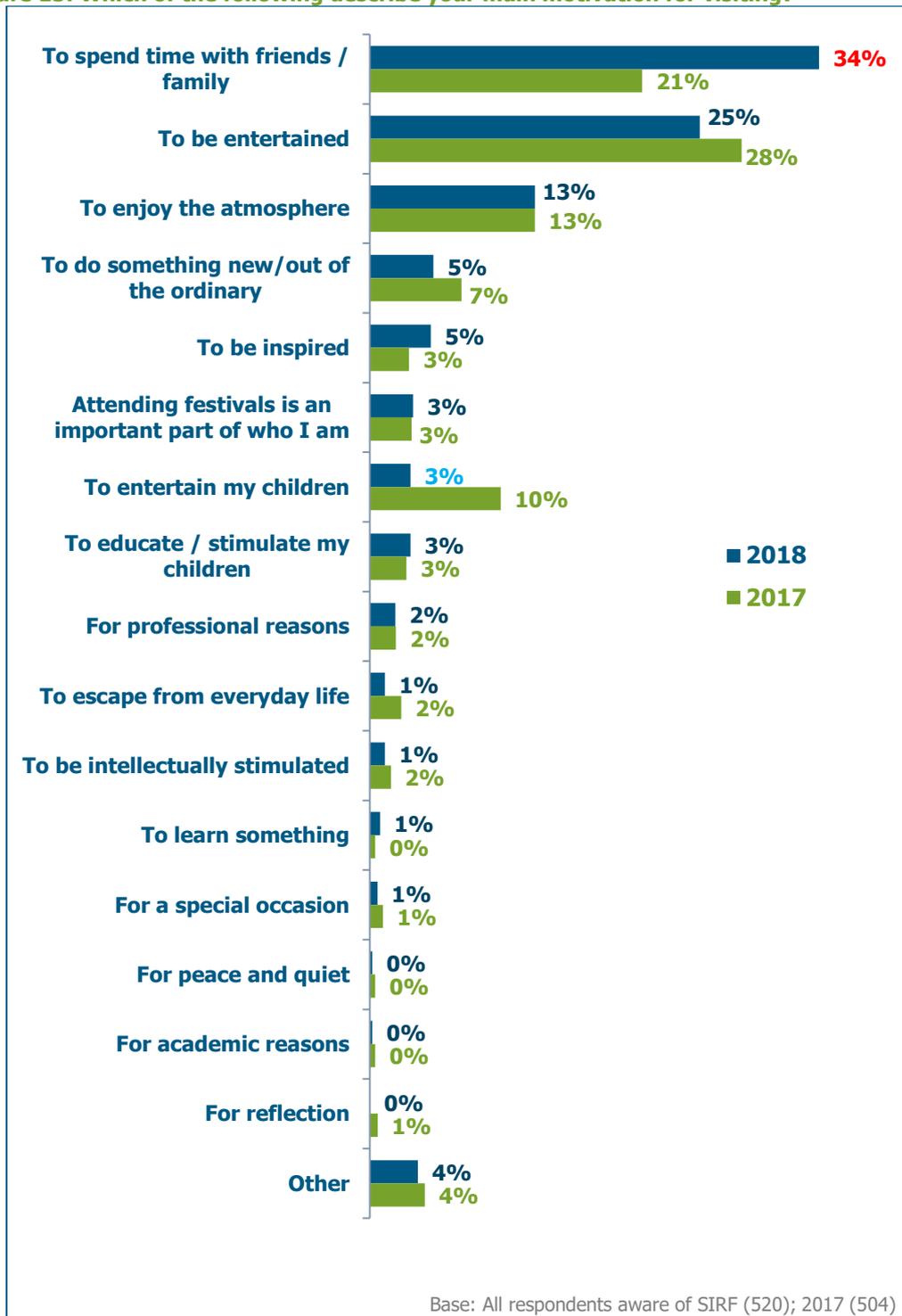


Figure 15: Which of the following describe your main motivation for visiting?



Other reasons for visit

Those respondents for whom SIRF was **not** the main reason for their visit were asked for what other reason they had visited Stockton. Responses, shown in Figure 16 below, indicate that *shopping* was, as last year, the primary other reason for being in Stockton with a rise in the those citing a *visit to friends* as the reason. However, the data should only be used as a cautious guide as base sizes are low.

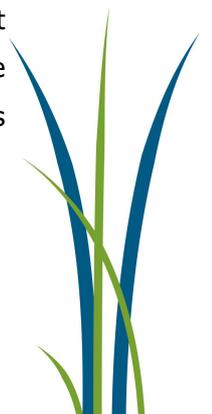
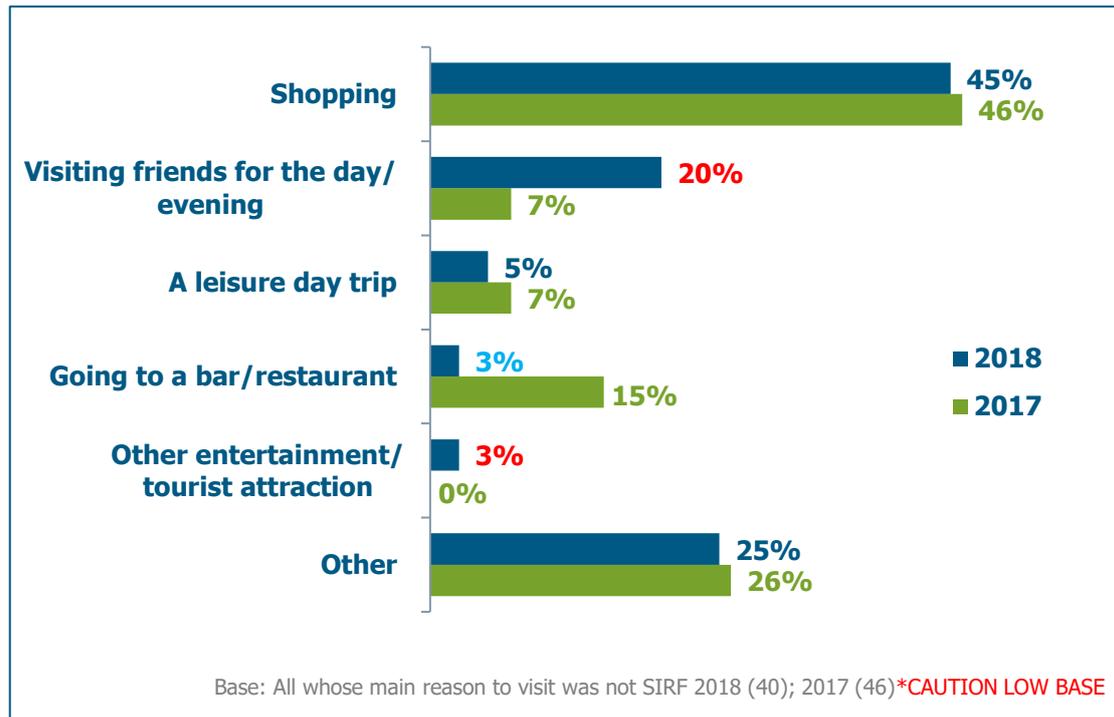


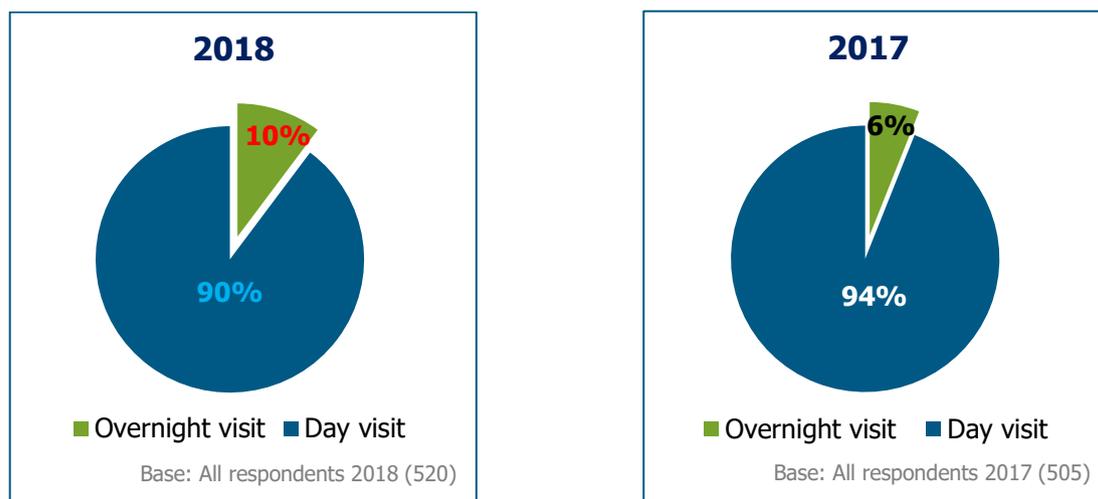
Figure 16: What is / was the main purpose of your visit?



Nature of trip

A number of questions in the interview related to the nature of the visit, to enable estimates to be made of the profile of the audience and specifically the different types of visitor present within it.

Figure 17: Does / did your visit to SIRF include an overnight stay away from home?



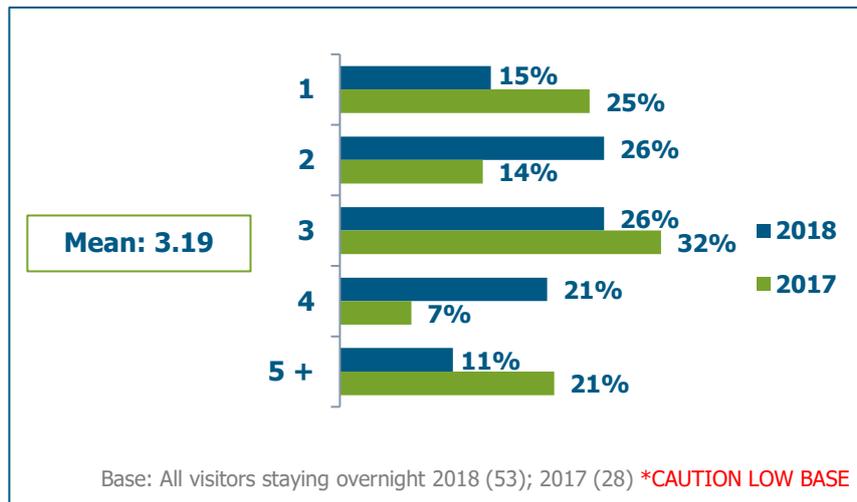
As can be seen, the majority [90%] of the sample of the SIRF 2018 audience were on 'day' rather than 'overnight' trips. Still, 10% of respondents did incorporate an overnight stay away from home in their trip to festival, compared to 6% last year. The increase in overnight visitors



perhaps reflects the significant rise in visitors from outside of the North East to the Festival this year, as reported previously.

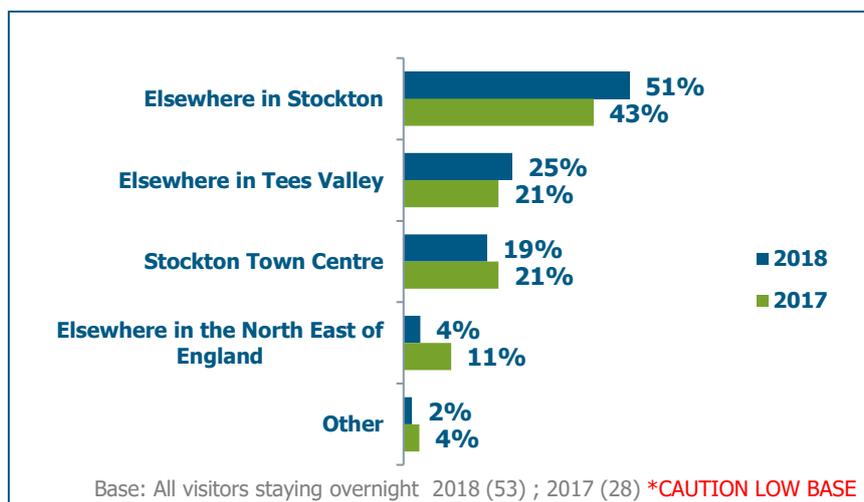
Those overnight visitors were further asked how many nights they spent away from home for their trip to the Festival. Figure 18 shows that **15% stayed for 1 night. The average stay away from home was 3.19, up on 2.41 nights in 2017.** However, given the base size of overnight visitors is relatively low (53), these findings should be treated with some caution.

Figure 18: How many nights are you staying / did you stay away from home for SIRF?



The **majority [70%] of those staying overnight stayed in Stockton Borough.** This year one in five [**19%**] respondents stayed in Stockton Town Centre, a similar proportion to 2017.

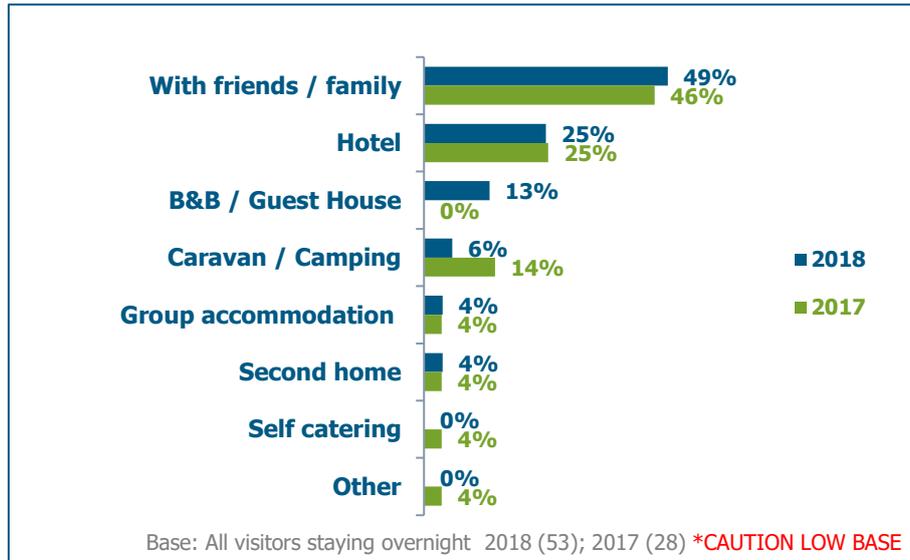
Figure 19: Where are you staying/ did you stay?



Half of those staying overnight [49%] stayed with friends or family. In an equal proportion to last year, a **quarter [25%]** of visitors staying overnight were accommodated in a **hotel**.



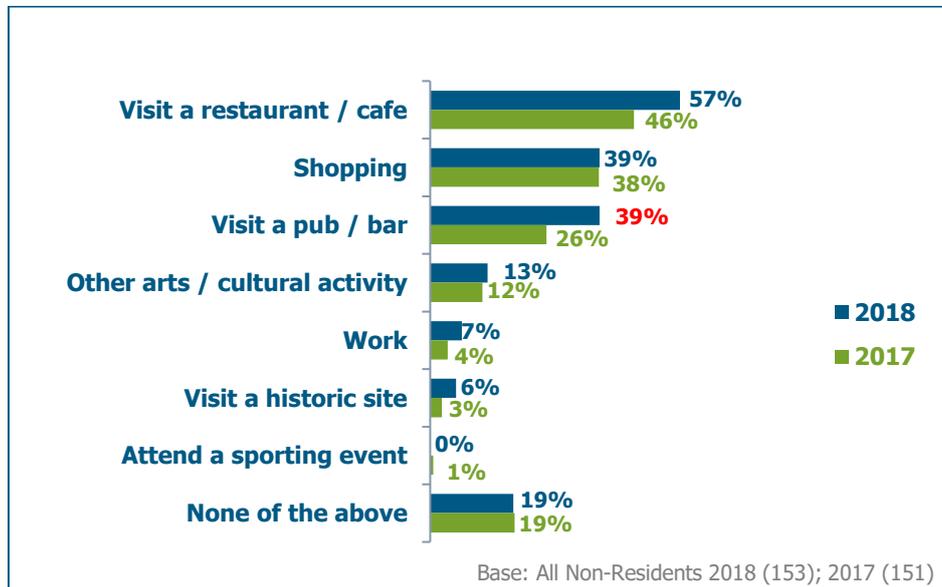
Figure 20: Which type of accommodation are you staying / did you stay in?



Non-Residents' activities in Stockton

Non-Residents were asked what other activities they had partaken or intended to partake in during their visit to Stockton. **Well over half [57%]**, said they had visited or intended to visit **a restaurant or cafe**. There was a significant rise in those indicating they had or would visit a pub or bar: **39%** in 2018, compared to **26%** in 2017. The full range of activities are laid out below in Figure 21.

Figure 21: Which of these have you done / did you do on this visit to Stockton?

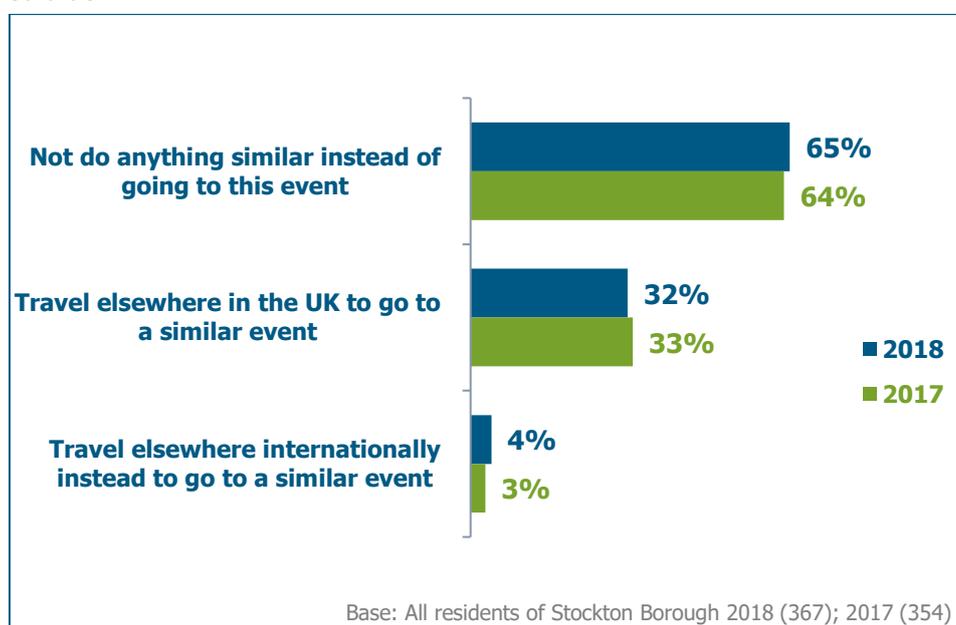


Residents' alternative behaviours

It is important for the Direct Economic Impact evaluation to establish how the existence of SIRF 2018 impacts on Residents' behaviours and specifically what Residents would do if the festival *did not* take place. When it comes to Direct Economic Impact evaluations, the expenditure of those Residents who state they would go elsewhere to see a similar event is included in the overall expenditure data, as without SIRF this expenditure would be lost to the borough.

Figure 22 charts that in closely similar proportions to last year, **35% of Residents would travel elsewhere to go to a similar event** in the circumstances stipulated above; this group is constituted of **32%** who would travel to somewhere in the UK and a further **4%** to somewhere internationally.

Figure 22: If this event were not held in Stockton, which statement best describes what you would do?



Satisfaction with and perceptions of SIRF

Here the report considers the *ratings* respondents give to the festival, their experience of visiting it and perceptions of the festival in the wider context of Stockton.

Rating the festival

Respondents were asked to rate aspects of their experience of SIRF 2018. Overall, ratings were very positive.

Ease of physical access, the whole experience and *quality of the event* all scored particularly highly: **a substantial majority [93%] rated the 'whole experience' as positive**, which is a significant increase on last year's **87%**. This returns the overall positive rating to the level



recorded in 2016 [92%]. There was generally a positive increase in respondents' ratings of the various aspects of their experience of SIRF 2018.

Figure 23: Thinking of the festival, how would you rate the following?

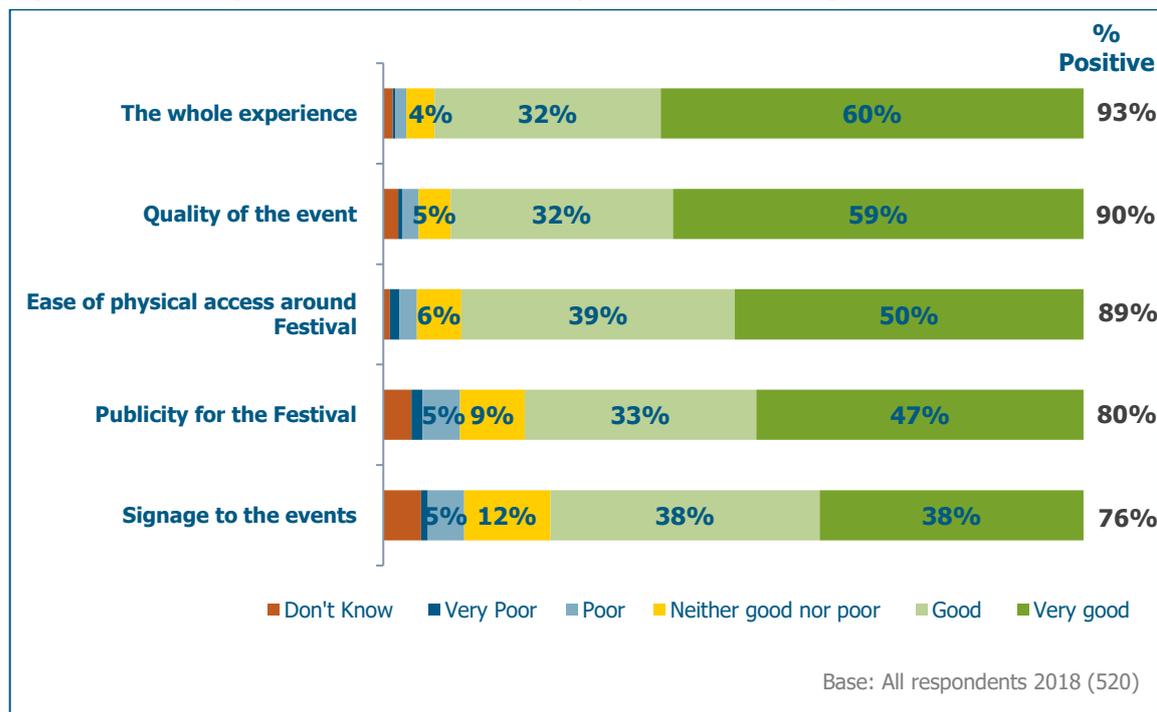


Figure 24: Comparison of positive ratings 2017 and 2018

	% Rating Good or Very Good	
	2018	2017
The whole experience	93%	87%
Quality of the event	90%	84%
Ease of physical access around festival	89%	90%
Publicity for the festival	80%	75%
Signage to the events	76%	77%

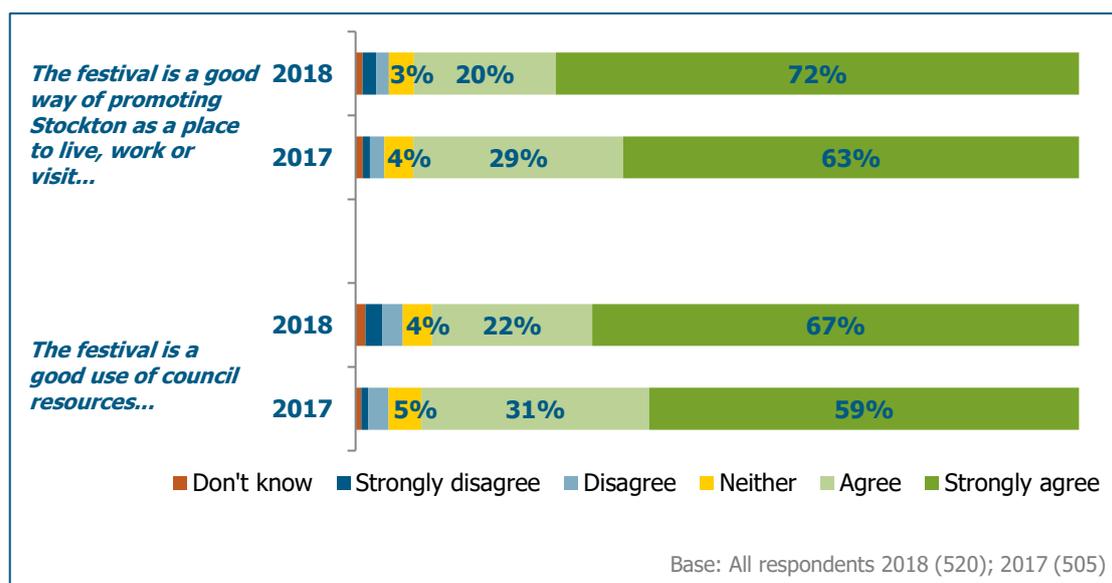
Perceptions of the festival for Stockton

There were also questions to evaluate how respondents perceive the festival in the context of Stockton Borough.

As Figure 25 will show, the **majority of respondents agreed** that *the festival is a good use of council resources* [89%] and that *the festival is a good way for promoting Stockton as a place to live, work or visit* [92%]. Overall, in comparison with 2017, these results are very similar, but there is some change in the strength of positivity of agreement year-on-year.



Figure 25: Please tell me the extent to which you agree or disagree with the following statements:



Respondents were also asked if anything could have been done *to increase their enjoyment of the event or SIRF 2018*.

Overall, just less than half [47%] of respondents suggested there was something that could have added to their enjoyment – a similar proportion to 2017.

Further enquiry raised a range of ideas and the following themes emerged:

- Suggestions of practicalities: areas of coverage in case of inclement weather; more available seating; high stages to improve visibility at ground-level events, with several respondents pairing this with a call for areas for children to view events with large crowds
- With a significant proportion of respondents having attended multiple SIRFs in the past, some reflected on changes to the makeup of the Festival programme across the year, raising a desire for a greater number of live music acts
- An improved offer of food and refreshment stalls
- A more varied programme to include activities for small children.

Propensity to recommend and return

Respondents were asked about their propensity to *recommend SIRF to family or friends* and to *return to Stockton for SIRF 2019*.

In both cases, a sizeable majority of respondents answered positively: **93% said they were likely to recommend SIRF to family or friends** (even more positive than 2017's 89%); **94% agreed they were likely to return for SIRF 2019**. These findings were similar to those from last year.



Figure 26: On a scale from 0-10 how likely is it that you would recommend SIRF to a friend, family member or colleague?

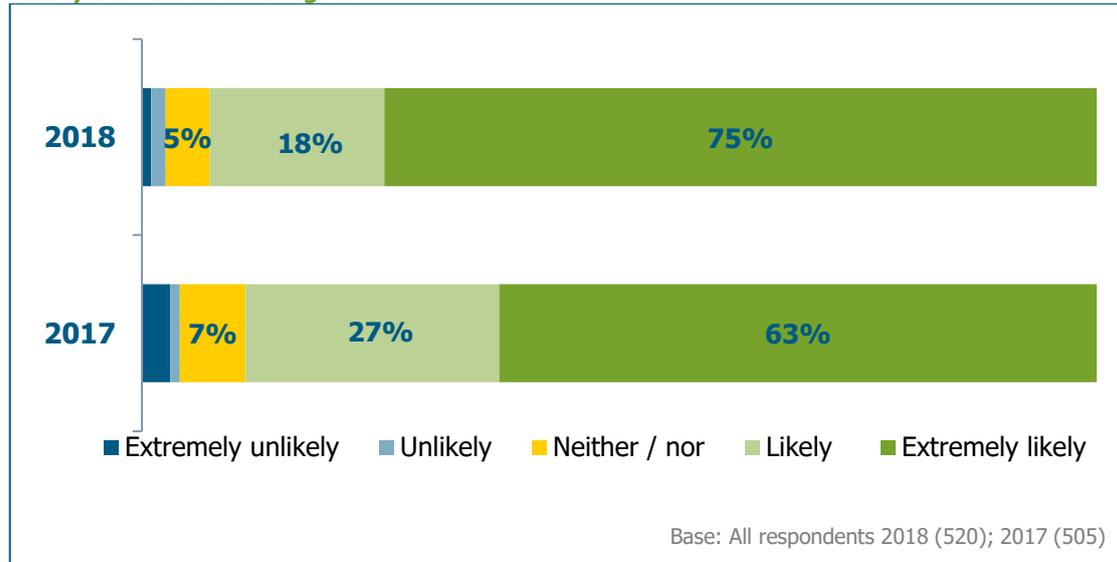
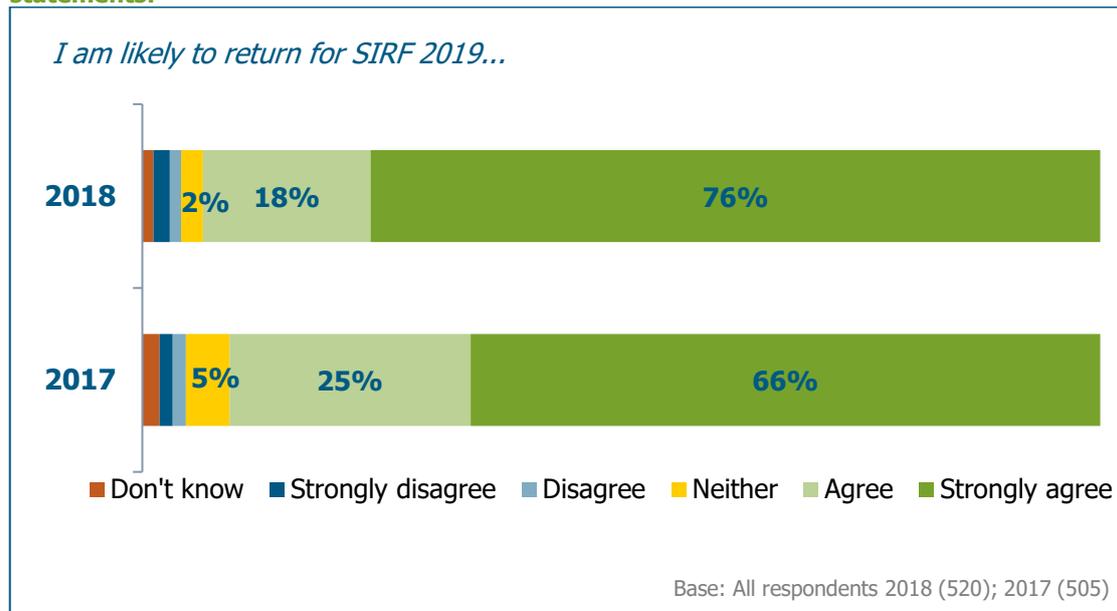


Figure 27: Please tell me the extent to which you agree or disagree with the following statements:



Engagement with arts and cultural events

The research included questions to establish the extent to which the audience at the Festival engages with arts and culture more generally, to give an indication of the degree to which SIRF reaches people who would otherwise not be involved with the sector.

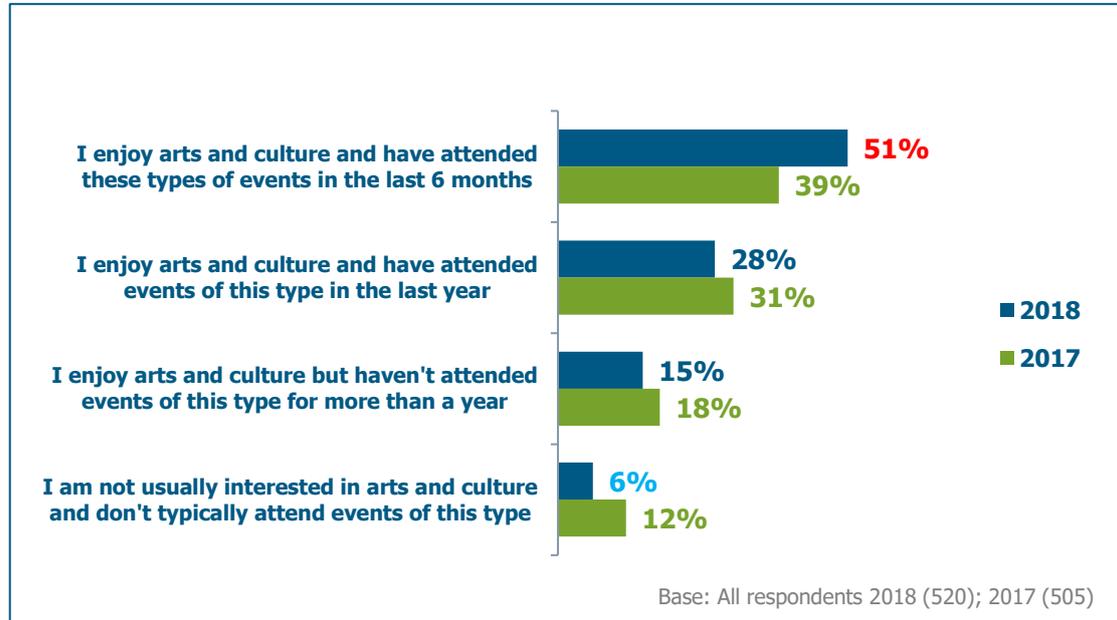
Respondents were asked to select one of the statements provided by the survey that best describes the place that arts and culture has in their life.

The **majority [94%], up on last year's 88%, already engage with arts and culture** to varying degrees: **around half [51%]** said they *enjoy arts and culture and have attended these types of events [like SIRF] in the last 6 months*. This increases to **79%** if the time period



is extended to cover *in the last year*. This picture of the audience’s cultural interests shows a higher frequency of attendance at events like SIRF in the past year compared to in the year running up to the Festival in 2017.

Figure 28: Which of these statements best describes the place that arts and culture has in your life?



Audience composition

It is important to define the composition of the audience for SIRF to provide the basis for the Direct Economic Impact calculation, as well as giving the organisers further insight into the nature and behaviour of those attending the festival.

Specifically, the audience was considered in terms of:

- **Residents vs Non-Residents**
- **Nature of trip: day or overnight**

Similarly to last year, the **majority of the audience, 71% were Residents of Stockton Borough**, which therefore defines **29% of the audience as Non-Residents of the Borough**.



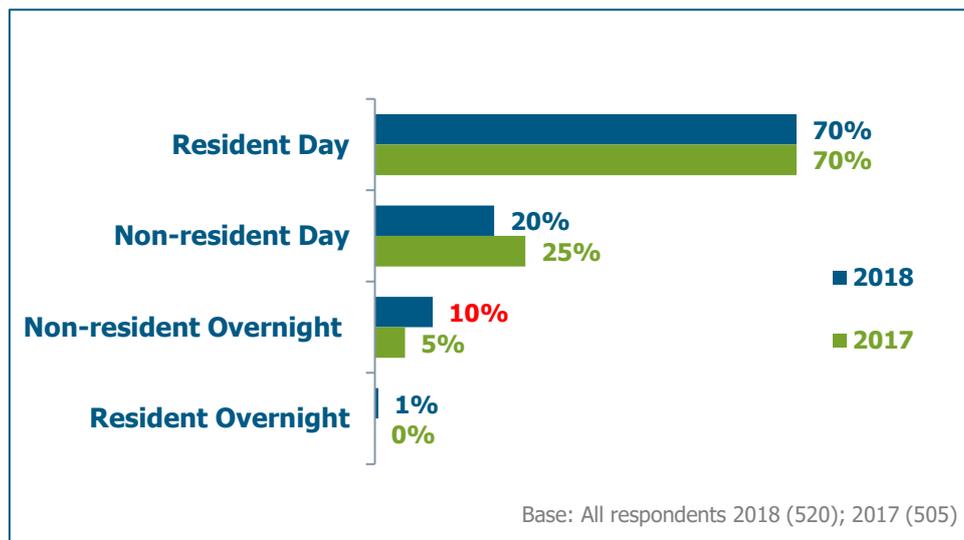
Figure 29: Overall audience composition, Residents and Non-Residents



Figure 30 illustrates a further breakdown of Residents and Non-Residents into those on day or overnight trips.

As shown, the **majority of visits were day trips**: Resident day trips predominated [**70%**].

Figure 30: Audience composition by type, 2018 and 2017



The table overleaf illustrates how the whole sample is composed according to respondents' status (Resident or Non-Resident) and their type of visit (Day or Overnight). There has been an increase in the proportion of Non-Residents staying overnight and a corresponding decrease in Non-Residents on a daytrip.

These proportions are then extrapolated to show an estimate of quantities of people for each category within the overall audience, based on Stockton Borough Council's estimate that the crowd size was 65,500 across the Festival.

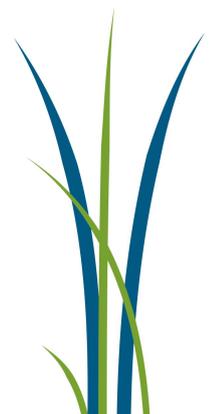


Figure 31: Audience composition, Residents and Non-Residents, Day and Overnight trips

	% based on sample		Extrapolated nos. based on 2018 crowd size
	2018	2017	
<i>Base:</i>	520	505	65,500*
Residents on day trip	70%	70%	45,850
Residents staying overnight	1%	0%	373
Non-Residents, on day trip	20%	25%	12,976
Non-Residents, on overnight trip	10%	5%	6,301

*Estimate of audience numbers over the 4 days of SIRF 2018, provided by Stockton Borough Council

Expenditure

This section of the report considers expenditure at SIRF 2018, using data generated from the research. The expenditure data below shows the average expenditure across all Residents and Non-Residents (Figure 32) and by category of expenditure (Figure 33). It should be noted that not all this expenditure can be considered as additional to the local economy and does not therefore constitute Direct Economic Impact attributable to SIRF 2018, which is addressed separately in the next section of this report.

The average expenditure has been calculated by respondent type and for each category, using individual responses for spend and group size to obtain a 'per person' figure per respondent. Any respondents that stated that they 'did not know how much they had spent' on a category were attributed the average expenditure of those who knew how much they had spent. This was to ensure that the average expenditure did not change but that the total included their estimated expenditure.

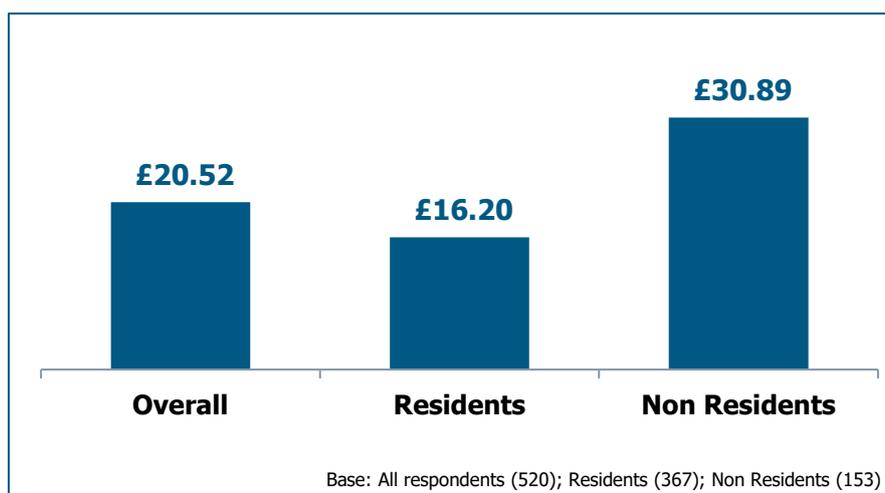
Average expenditure

The **overall** average rate of expenditure at SIRF 2018 is estimated at **£20.52** per person, with **Residents** spending on average **£16.20** each at the event, alongside **Non-Residents** who spent an average of **£30.89** each.

Note: We asked how much those attending had spent on travel both within Stockton and the wider region for reference. Although spend outside of Stockton cannot be included in calculations of Direct Economic Impact on Stockton itself, as an indication, inclusion of expenditure on travel outside of Stockton increases the overall spend per person to £21.88.



Figure 32 Average expenditure (including non-qualifying)



The table below provides a summary of expenditure across the different spend categories, split at a top level by Residents and Non-Residents. These values are provided, at the request of Stockton Borough Council, as an indication of the scale of gross expenditure **before discounts are applied, and therefore do not represent the Direct Economic Impact.**

Figure 33 Expenditure rates by category and type of visitor

	All Residents average £ PP	All Non-Residents average £ PP
Eating and drinking at festival	£2.37	£4.31
Eating and drinking in / from town centre businesses	£6.37	£10.18
Overnight accommodation	£0	£8.48
Shopping at the festival	£1.02	£1.61
Shopping other than at the festival	£3.36	£2.86
Travel & transport Stockton	£1.61	£0.83
<i>Travel & transport elsewhere in Tees Valley</i>	<i>£0.16</i>	<i>£1.25</i>
<i>Travel & transport in the North East</i>	<i>£0.07</i>	<i>£2.87</i>
Entertainment and recreation	£0.70	£1.01
Other	£0.89	£1.76



Calculating Direct Economic Impact

This section of the report considers the Direct Economic Impact of SIRF 2018 on Stockton Borough, using data generated from the research, supplemented, as appropriate, by information provided by Stockton Borough Council.

In calculating the Direct Economic Impact for the event, Bluegrass has followed the principles of 'EventImpacts', a methodology which is endorsed by the Department for Digital, Culture, Media & Sport (DCMS) and UK Sport among others, applying the following process:

- [a] calculating the **proportions of the audiences whose expenditure 'qualifies' to be included in the impact**
- [b] applying these **proportions of audience type** (from the primary research) to the **actual audience size** (from the organisers), to arrive at an **approximation of the numbers of each type occurring in the actual crowd**
- [c] multiplying these numbers of **each type occurring in the actual crowd** by the **average individual spend for each type** to provide an estimated **expenditure by audience type**
- [d] **adding other known expenditure in the Stockton area attributable to the event** (from the organisers) to the audience expenditure figures to arrive at an overall estimate of Direct Economic Impact

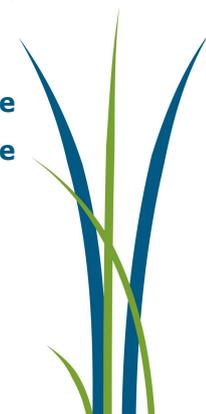
Qualifying expenditure

Not all expenditure by the audience can be included in the Direct Economic Impact, as some of it:

- **would have occurred anyway** and/or
- **is not attributable to SIRF**

Residents – Whilst resident expenditure would not usually be included in the Direct Economic Impact calculation, it is valid to count the expenditure of those Residents who would otherwise take their money out of the Stockton area if SIRF did not take place. To establish the proportion to whom this would apply, all Residents of Stockton Borough in the sample were asked to indicate *what alternative action they would take in the absence of SIRF*, to provide a measure of the scale of expenditure which is retained within the area which would otherwise be spent elsewhere. **Only those Residents who would actively go out of Stockton to another event in the absence of SIRF qualify for inclusion in the Direct Economic Impact calculations.**

In 2018, around **a third [35%]** of Residents in the sample indicated that they **would have gone elsewhere** if SIRF had not taken place in Stockton, **representing 25% of the whole sample.**



Non-Residents – All Non-Residents in the sample were asked whether or not their visit to Stockton was specifically to attend the festival. **Only those whose presence is specifically attributable to SIRF qualify for the Direct Economic Impact calculation.**

In 2018, **93% of Non-Residents** in the sample indicated that SIRF was the **main purpose of their trip**, representing **27% of the whole sample.**

Therefore, for SIRF 2018, using this principle of 'qualifying' and 'non-qualifying' Residents and Non-Residents, the Direct Economic Impact calculations are based on the following breakdown of audience composition:

Figure 34: Audience composition by 'qualifying' and 'non-qualifying'

	% of total sample
Residents	71%
Made up of:	
Qualifying	25%
Non-qualifying	46%
Non-Residents	29%
Made up of:	
Qualifying	27%
Non-qualifying	2%

Base: All respondents 2018 [520]

Average Qualifying Expenditure

The rates of expenditure from the previous section have been further analysed to identify average rates of expenditure amongst only those Residents and Non-Residents who 'qualify' to be counted in the Direct Economic Impact calculation, as defined above. Figure 35 below illustrates the resulting levels of expenditure.

Considering only these **qualifying Residents** and **Non-Residents**, the **overall** average rate of expenditure at SIRF 2018 was **£24.98**. This compares to **£21.57** in 2017.

At **£32.00** the average spend of Non-Residents is higher than amongst qualifying Residents, and Non-Residents are, on average, spending more than they did in 2017. Alongside this, the average spend of qualifying residents has stayed level [**£17.26** in 2018, **£17.05** in 2017].



Figure 35: Qualifying individual average spend in Stockton, by respondent type



The following chart shows how expenditure was distributed across different spend categories in 2018.

On average, respondents were spending the most on **Eating & Drinking [£12.41]**, increasing slightly when compared to 2017 [**£9.63**]. Average spend on **Accommodation**, when averaged across all qualifying respondents (including those who did not stay overnight) was **£4.63**, up slightly on as last year (NB The average individual spend on accommodation when averaged across only those whose trip included an overnight stay, was **£26.72**).

Figure 36: Individual average spend by category



Crowd Size

Stockton Borough Council has estimated that the **crowd over the 4 days of SIRF 2018 amounted to 65,500 people.**

A note from Stockton Borough Council on estimating audience numbers

Stockton Council has attempted to strengthen its method for calculating audience sizes and visitor numbers at its major events by introducing an estimated audience size for each separate event location or site and for each day or part day session. Where locations allow, these estimates are correlated with footfall counter data, which measures numbers of people in a given space, rather than audiences for an event in that space. This produces a total audience estimate which is expressed as a range to allow a margin of error. In 2018 the estimated range was 63,000 to 68,000. Bluegrass have taken a mid-point from the range to calculate the economic impact.

Audience Impact Calculations

Based on the estimated crowd size and using the proportions of qualifying audience types multiplied by the average spend by each type, the **calculation of Direct Economic Impact** has been completed, illustrated in Figure 34 below.

Figure 37: Audience impact calculations

TYPE OF RESPONDENT	% of audience	= volume in crowd	Ave Spend	Extrapolated Spend
Qualifying Residents	24.81%	16,251	£17.26	£280,492
Qualifying Non-Residents	27.31%	17,888	£32.00	£572,416
Total Qualifying Spend				£852,908

Additional impacts

Expenditure by Stockton Borough Council on Artists and Performers

The expenditure of the Council on hospitality for artists and performers taking part in the Festival is also taken into account when calculating Direct Economic Impact.

Stockton Borough Council have provided estimates of this related expenditure for Accommodation, Catering and Transport, as shown below, **adding a further £91,223 to the Direct Economic Impact value.**



Figure 38: Value of Council expenditure on Artists and Performers

	NUMBER	VALUE
Accommodation	1,004 Bed nights	£55,206
Catering	2,599 Meals	£30,556
Transport	Taxis & Shuttlebuses	£5,461
TOTAL		£91,223

Direct Economic Impact Calculation

The table below shows the calculation of Direct Economic Impact using the spend totals of Qualifying Residents, Qualifying Non-Residents and the additional income from Crew and Performer expenditure, to arrive at an estimate of Direct Economic Impact.

Figure 39: Direct Economic Impact Calculation

Residents	£280,492
Non-Residents	£572,416
Additional impacts	£91,223
TOTAL	£944,131

On this basis, the estimated Direct Economic Impact of SIRF 2018 was £944,131.



APPENDIX 1

SIRF 2018 Visitor Survey

Interview time:	Thursday 2 nd August	1	
	Friday 3 rd August	2	
	Saturday 4 th August	3	
	Sunday 5 th August	4	

Interview location:	High Street	1	
	Church Road	2	
	Riverside	3	
	Parish Gardens	4	
	Trinity Green	5	

QA Have you seen or taken part in today's events?	Yes	1	continue
	_____	—	_____
	No	2	T&C

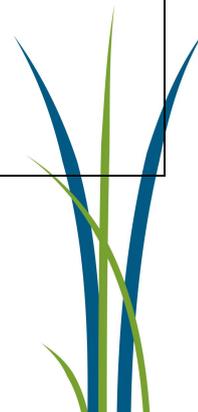
Good morning/afternoon/evening. My name is _____ from Bluegrass Research.

We're carrying out a survey on behalf of Stockton Borough Council to help learn more about the audience at SIRF. The survey should take around five minutes to complete. Bluegrass works in-line with GDPR and the Market Research Society code of conduct which means that all of your answers will remain completely confidential and will only be used for research purposes.

Q1 Do you live in the UK?	Yes	1	Go to Q2
	-----		-----
	No	2	Go to Q4

IF Yes AT Q1

Q2 Where is your permanent place of residence ?	Stockton Borough	1	Go to Q3
	Elsewhere in Tees Valley	2	
	Elsewhere in the North East	3	
	Elsewhere in England	4	
	Scotland	5	
	Northern Ireland	6	
	Wales	7	



ASK ALL WHO ANSWERED CODE 1 AT Q1

Q3 What is your full postcode?
This will only be used for research purposes and won't be used to contact you or passed on for any other reason

WRITE IN

<input type="text"/>						
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ASK ALL WHO ANSWERED CODE 2 AT Q1

Q4 What is your country of residence?

WRITE IN _____

ASK ALL

Q5 Are you aware that this event is part of **Stockton International Riverside Festival / SIRF?**

Yes _____	1 —	GO TO Q7
No _____	2	GO TO Q6

ASK ALL NOT AWARE AT Q5

Q6 Are you aware of **Stockton International Riverside Festival / SIRF?**

Yes _____	1 —	GO TO Q7
No _____	2	GO TO Q9

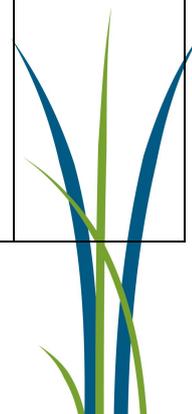
ASK ALL AWARE AT Q5 OR Q6

Q7 How did you hear about the Festival?

MULTICODE

Note: If respondent says 'been before' ask if they have seen / heard anything about SIRF anywhere this year?

Local newspaper / magazine article		
Local newspaper / magazine advert		
Local radio		
Online advert		
SIRF Twitter		
SIRF Facebook		
SIRF Instagram		
Other social media (please specify)		
SIRF website		
Stockton Borough Council Website		
Other council website/signage		
Family Explorers		
Outdoor banners		



Leaflet through the door Brochure in public place Stockton News Stockton Spring Summer Events Guide Stockton town centre business Businesses outside of Stockton centre (eg Ingleby Barwick, Norton, Thornaby, Billingham) Libraries Rediscover Stockton Shop SIRF out of town shows Word of mouth Just passing and came to see Other (please specify)_____		
--	--	--

ASK ALL AWARE AT Q5 OR Q6

Q8 Is the Festival / this event the main reason for being here / your visit today?

Yes	1	Go to Q10
_____	_____	
No	2	Go to Q9

ASK IF No AT Q7 OR UNAWARE AT Q6

Q9 What was the purpose of your visit here today?

MULTICODE

Other entertainment / tourist attraction	1	
Shopping	2	
A leisure day trip	3	
Going to a bar or restaurant	4	
Visiting friends for the day / evening	5	
Other (please specify)_____	6	

ASK ALL

Q10 Have you visited Stockton International Riverside Festival before?

Yes	1	Go to Q11
No	2	Go to Q13

ASK IF 'YES' AT Q10



Q1 When was your last visit
1 before this year?

Last year	1	
Two years ago	2	
Three years ago	3	
Between four and five years ago	4	
More than five years ago	5	

ASK IF 'YES' AT Q10

Q1 And how many SIRF
2 Festivals have you visited before?

WRITE IN NUMBER		
-----------------	--	--

ASK ALL

Q13 Are you visiting with
other people?

Yes	1	Go to Q14
No	2	Go to Q15

ASK IF Yes AT Q14

Q14 Not including yourself, how many of those you are visiting with are aged....

16 or older (write in how many) _____	
Under 16 (write in how many) _____	

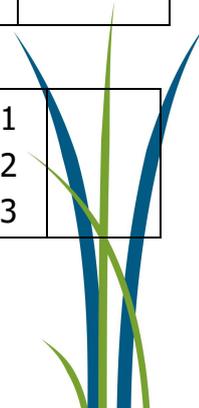
Q15 I'd like you to think about arts and culture. So, for example, **museums, galleries, theatre, dance, music and literature/book festivals.** Which of these statements best describes the place that arts and culture has in your life?
SINGLE CODE

I enjoy arts and culture and have attended events of this type in the last 6 months	1	
I enjoy arts and culture and have attended events of this type in the last year	2	
I enjoy arts and culture but haven't attend events of this type for more than a year	3	
I am not usually interested in arts and culture, and don't typically attend events of this type	4	

ASK IF AWARE AT Q5 OR Q6

Q16 Which of the following describe your motivations for visiting today?

To spend time with friends / family	1	
For a special occasion	2	
For peace and quiet	3	



Q16b **MULTICODE**
And which of these was your **main** motivation?

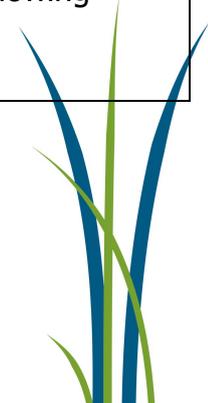
SINGLE CODE

To be intellectually stimulated	4	
To be entertained	5	
To be inspired	6	
To do something new/out of the ordinary	7	
	8	
To learn something	9	
To enjoy the atmosphere	10	
For reflection	11	
Attending festivals is an important part of who I am	.	12
To escape from everyday life	13	
For academic reasons	14	
For professional reasons	15	
To entertain my children	16	
To educate / stimulate my children	17	
Other (please specify)		

ASK ALL

Q17	And thinking of the Festival, how would you rate the following? INTERVIEWER CODE 6 IF DON'T KNOW/NO OPINION						
		Very poor	Poor	Neither good nor poor	Good	Very good	D/K
	Quality of the event	1	2	3	4	5	6
	The publicity for the Festival	1	2	3	4	5	6
	Ease of physical access around the events	1	2	3	4	5	6
	Signage to the events	1	2	3	4	5	6
	The whole experience	1	2	3	4	5	6

Q18	Please tell me the extent to which you agree or disagree with the following statements? INTERVIEWER CODE 6 IF DON'T KNOW/NO OPINION
------------	---



		Strongly disagree	Disagree	Neither	Agree	Strongly agree	D/K
	The festival is a good use of council resources	1	2	3	4	5	6
	The festival is good for promoting Stockton as a place to live, work or visit	1	2	3	4	5	6
	I am likely to return to Stockton for SIRF 2019	1	2	3	4	5	6

Q19	On a scale of 0-10, how likely is it that you would recommend Stockton International River Festival to a friend, family member or colleague, with 10 being extremely likely and 0 being not at all likely?											
	Not at all likely											Extremely likely
	0	1	2	3	4	5	6	7	8	9	10	

RESIDENTS GO TO Q21, ASK ALL NON-RESIDENTS

Q20 Which of these have you done or intend to do on this visit to Stockton?

Visit a restaurant / cafe	1	
Visit a pub / bar	2	
Shopping	3	
Work	4	
Attend a sporting event	5	
Visit a historic site	6	
Other arts / cultural activity	7	
None of the above	8	

NON-RESIDENTS GO TO Q22, ASK STOCKTON RESIDENTS ONLY

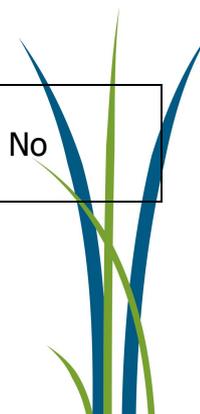
Q21 If this event were not held in Stockton which of the following statements best describes what you would do?
Would you.....?

Travel elsewhere in the UK instead to go to a similar event	1	
Travel elsewhere internationally instead to go to a similar event	2	
Not do anything similar instead of going to this event	3	

ASK ALL

Q22 Does your visit to the Festival include an overnight stay **away from home?**

Yes	No
-----	----



1	2
Go to Q23	Go to Q26

ASK ALL STAYING OVERNIGHT AWAY FROM HOME

Q23 How many nights are you spending away from home for the Festival?

ASK ALL STAYING OVERNIGHT AWAY FROM HOME

Q24 Where are you staying?

Stockton Town Centre	1	
Elsewhere in Stockton	2	
Elsewhere in Tees Valley	3	
Elsewhere in North East	4	
England	5	
Other		

ASK ALL STAYING OVERNIGHT AWAY FROM HOME

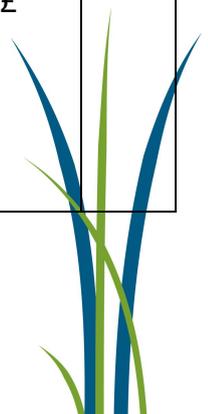
Q25 Which type of accommodation are you staying in?

B&B / Guest house	1	
Hotel	2	
Caravan / Camping	3	
With Friends / Family	4	
Self catering	5	
Group accommodation [e.g. University / Youth Hostel]	6	
Second home	7	
Other (please specify)	8	

ASK ALL

Q26 How much do you estimate you will spend on yourself and others on each of the following items or activities today? For each item, we would like to know only the amount you will spend in **Stockton** during your visit to the Festival /SIRF. **Please estimate values to nearest £. Please enter a value for each category, 0 if nothing spent, or tick DK if unable to estimate**

Eating and Drinking at festival (not town centre businesses)	£	<u>DK</u>
Eating and drinking in/from town centre businesses	£	-
Shopping at the festival	£	
Shopping other than at the festival	£	
Entertainment / recreation	£	
Travel and transport in each of these places (if travelling by car, where you filled up with fuel):	-----	
Within Stockton	-	
From elsewhere within Tees Valley	£	
From elsewhere within the North East		



Q27 How many people does this cover?

Other _____		
Overnight accommodation (if applicable)		
WRITE IN		

ASK ALL

Q28 Could anything have been done to increase your enjoyment of today's event or SIRF 2018 in general?

Yes	No
-----	----

	What could have been done? Please write in

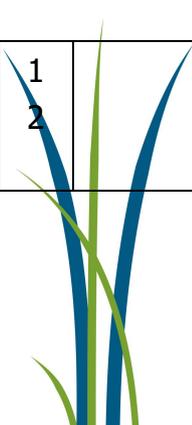
ASK ALL

Q29 Which age category do you belong to?

16 – 19	1	
20 – 24	2	
25 – 29	3	
30 – 34	4	
35 – 39	5	
40 – 44	6	
45 – 49	7	
50 – 54	8	
55 – 59	9	
60 – 64	10	
65 – 69	11	
70 – 74	12	
75 – 79	13	
80 – 84	14	
85+	15	
Prefer not to say	16	

Q30 Gender
OBSERVE - DO NOT ASK

Male	1	
Female	2	



Q31 How would you describe your **working status**?

Full time employed	1	
Part time employed	2	
Self employed	3	
Unemployed seeking work	4	
Permanently ill / disabled	5	
Retired	6	
Student	7	
Other, please state	8	
Refused	9	

Q32 To which of these ethnic groups do you consider you belong?

White

- English/Welsh/Scottish/N Irish/British..... 1
- Irish 2
- Gypsy or Irish Traveller 3
- Any other White background 4
- 13

Asian or Asian British.....

- Indian 5
- Pakistani..... 6
- Bangladeshi 7
- Chinese 8
- Any other Asian background 9
-

Prefer not to answer

Other (*Please write in*) 19

Mixed

- Mixed White and Black Caribbean.. 10
- Mixed White and Black African 11
- Mixed White and Asian 12
- Other mixed/multiple ethnic background

Black or Black British

- Caribbean 14
- African..... 15
- Any other Black background 16

Other ethnic group

- Arab 17
- Any other ethnic group..... 18

Q33 [a] Are **your day to day activities** limited because of a disability which has lasted or is expected to last at least 12 months?

[b] Are the activities **of other members of your party** limited because of a disability which has lasted or is expected to last at least 12 months?

	[a]	[b]	
Yes, limited a lot	1	1	
Yes, limited a little	2	2	
No	3	3	
Prefer not to say	4	4	

ASK ALL WHO ANSWER YES AT Q33[A] AND OR [B]



Q34 Are there any ways SIRF organisers could improve accessibility for you/them?

WRITE IN _____

Data Protection

To monitor quality, a small proportion of respondents are re-contacted to check that proper procedures have been followed. For this reason, may I ask for the following contact information?

Your data will only be used for this purpose and will be deleted/ anonymised following this process. Your details will not be passed on to any third parties or used for marketing purposes. Bluegrass works in-line with GDPR and the Market Research Society code of conduct.

Please be assured that your details will only be used in this manner. If you would prefer not to give us this information, your responses to the survey will still be used and we thank you for taking part.

FOR BACK CHECK PURPOSES ONLY	
Respondent's Name:	
Address & Postcode:	
Tel. No:	
INTERVIEWER: PLEASE ENSURE YOU RECORD THESE DETAILS, FAILURE TO DO SO MAY LEAD TO A DEDUCTION FROM YOUR PAY.	

INTERVIEWER – THANK RESPONDENT AND MRS CERTIFICATION

