

The Economic Impact of Glyndebourne

Glyndebourne and East Sussex County Council

Executive Summary
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GLYNDEBOURNE



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Hippolyte et Aricie, 2013 Glyndebourne Festival, photo Bill Cooper.

Executive Summary

Glyndebourne is an internationally renowned opera house based in the heart of the South Downs in East Sussex. Established in 1934, Glyndebourne stages world-class opera to audiences of more than 150,000 every year. It presents an opera Festival from May-August and tours three productions across the UK every autumn.

Glyndebourne also runs an education programme throughout the year. Recent education projects include dedicated Performances for Schools, the Glyndebourne Youth Opera programme, a main-stage community opera, and diverse workshops, study days and special events.

This independent research reveals for the first time Glyndebourne's substantial economic impact. The research was conducted by BOP Consulting and commissioned by Glyndebourne and East Sussex County Council. Grants from Arts Council England and from the East Sussex Arts Partnership helped to fund the research.

The research was commissioned with the aim of supporting Glyndebourne and its partners to understand how they create economic value, to start to plan for maximising that value; and to generate evidence to underpin the East Sussex Cultural Strategy.

The research is part of a wider research project by East Sussex County Council including an analysis of the social capital of the De La Warr Pavilion and an analysis of Charleston's branding.

The BOP research team measured Glyndebourne's economic impact using a robust methodology that meets Government standards.

The research drew on:

- A survey of Glyndebourne audiences, which gained 3,367 responses
- Analysis of the money that Glyndebourne pays to locally-based staff and suppliers, and the money spent by visiting artists

- Interviews with Glyndebourne executives and Heads of Department and with three East Sussex County Council representatives, including the Leader of the Council
- Interviews with 19 businesses and artists based around Lewes who work with Glyndebourne or benefit from its presence.

BOP's principal finding is that Glyndebourne generates £11m of Gross Value Added (GVA) for East Sussex's economy, every year.¹

Glyndebourne is one of the largest businesses in the Lewes vicinity, with an annual turnover of £25m. Glyndebourne employs 150 year-round staff but, in addition to this, provides employment for almost 1,500 people over the course of a year. Some of these people are the performing company and production staff, ranging from singers, dancers and actors to conductors, orchestra, designers, directors and choreographers. Other people are taken on as seasonal staff in the technical departments (such as stage staff, costume, wigs and props makers) and in restaurants and front of house.

The largest contributor to Glyndebourne's economic impact is the money spent by the Festival audience at local hotels, shops, restaurants and attractions. The Glyndebourne Festival drew an audience of 98,000 in 2013, of which 96% came from outside the local area of Lewes and Ringmer. Of this audience 35% stayed overnight in East Sussex, spending an average of £81 each per day with local businesses and attractions.

The £11m of GVA also reflects spending by the audience for autumn Tour performances, Glyndebourne's payments to locally-based staff and suppliers, and money spent by visiting artists.

Approximately half of Glyndebourne's economic impact occurs within Lewes. This is no surprise: in addition to the many artists and Festival audience seen around town during the Festival, specialist businesses have relocated or started there because of trade with Glyndebourne. Many artists and staff choose to move or retire to Lewes.

¹ Gross Value Added (GVA) is an economic measure of wealth generation, and is related to Gross Domestic Product or GDP. See Appendix 6.1 for more details about the methodology.

The businesses and artists around Lewes that BOP spoke to, greatly value their relationships with Glyndebourne. The benefits that they report include business revenues, prestige, and the visitor footfall that Glyndebourne brings to the Lewes area.

“It offers ... a prestigious place to work, especially for younger singers, and fantastic opportunities to have on their CVs... that’s great for their careers.
(Performing company, Glyndebourne)

“We’ve grown incredibly in the last few years; without Glyndebourne we wouldn’t have been able to grow.
(Transport company, Lewes)

“When talking to clients we mention Glyndebourne ...
It’s a testimonial to our reputation. (Florist, Lewes)

During this research, there was much enthusiasm for greater partnership working between Glyndebourne and other parties.

The suggestions generated can be grouped into three categories:

- Glyndebourne might help its audience to discover more about East Sussex’s offer, and might work with local hotels, restaurants and attractions to develop suitable promotions and offers
- There could be closer working relationships between Glyndebourne and other cultural attractions around the county
- Glyndebourne could contribute to East Sussex County Council’s development of a joint cultural tourism offer and creative skills offer; and work with the Council on infrastructure planning.

“Historically we have not made the most of what we have. Anything we can do collectively is good.

(Cllr Keith Glazier, Leader of East Sussex County Council)

“The county’s collection of excellent cultural institutions can be more than the sum of the parts.
(Rupert Clubb, Director of Economy Transport and Environment, East Sussex County Council)

BOP Consulting thanks Glyndebourne and all the other stakeholders, interviewees and survey respondents who contributed to this report. We hope that the report will be useful as Glyndebourne and East Sussex County Council, and others, explore how they can maximise the benefits that Glyndebourne brings to the county.



Opera House & Wind Turbine, Glyndebourne 2012, photo Sam Stephenson.