

Mons 2015 - European Capital of Culture

Demystifying the risk of cultural investment

Final report

Assessment of the impact of Mons 2016 (JULY 2016)



EUROPEAN AFFAIRS



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INTRODUCTION

The purpose of this final report is to summarise the key information and lessons learned from Mons 2015 - European Capital of Culture in order to highlight the main findings of the economic and social impact assessment.

This assessment aims to measure the 'holistic' impact of Mons 2015, beyond the usual quantitative indicators such as job creation or numbers of tourists attracted, to take into account the residents' experience and the impact of the event on the city's image and future strategic development plans. To achieve this and overcome the traditional limitations of impact studies, we have relied on the following principles:

- The development of a multidimensional assessment model that takes account of the cultural investment's holistic impact.
- The use of a battery of some 150 indicators, both quantitative and qualitative, that go beyond the traditional economic impact indicators.
- A longitudinal study conducted before, during and after Mons 2015 to help the city gain a better understanding of the changes over time.
- The active involvement of local stakeholders (cultural, civil society and economic operators, public authorities, citizens) in data collection and analysis, so as to involve them in the assessment exercise.
- The development of a toolkit of indicators to measure the sustainability of the effects of Mons 2015 (see Appendix).

This impact study began in August 2012 with the delivery of a first report presenting the conceptual framework and work plan for the assessment work and setting out a first socio-economic profile of the area. The goal was to enable the comparison of quantitative and qualitative data collected for the period 2012-2013 and during the Mons 2015 year and the trends observable in 2016. Data collection came to an end in March 2016, except for visits to the tourist office and tourist stays (July 2016).

Report 2, submitted in September 2013, sought to provide as accurate a picture as possible of the Mons offering in terms of tourist reception and cultural events, local infrastructure in the field of the cultural and creative industries, and strengths in terms of attractiveness and image; it also sought to understand the expectations of residents and the economic and social partners before the launch. In addition, the report took stock of available statistical sources at national and local level and considered the means and tools that needed to be implemented to fill the gaps and improve the collection of qualitative data.

Report 3, submitted in February 2016, provided a survey of the collection activities performed during and after the event in relation to the original work plan. It presented some preliminary results.

In June 2016, the final assessment report was submitted – subject to the publication of the number of tourist overnight stays, available in mid-July 2016. The report was accompanied by a study prepared in April 2016, the objective of which was to estimate the leverage effect of the cultural investment made for Mons 2015 on the Belgian national economy, i.e. the return on investment of every euro spent by the Foundation on Mons 2015 - European Capital of Culture. These two reports were the subject of a presentation to the members of the Mons 2015 Foundation and the press in Mons on 21 June 2016.

This final report summarises our observations accumulated over the past three years. These observations relate to:

- the importance of the cultural investment in urban development strategies,
- the identification of the main achievements of Mons 2015 in economic and social terms,
- the importance of the title of European Capital of Culture in the definition of urban development strategies and the impact of European funding in the implementation of those strategies,
- the development of high-performance measurement tools to carry out an assessment of the cultural investment.

This report helps to implement the democratic principles of transparency and good governance in order to make the public institutions accountable for their actions to the people.

SECTION 1: CULTURAL INVESTMENT: JUST ANOTHER FORM OF INVESTMENT?

Cultural investment is similar to other forms of investment and is based on the same financial approach of sound management. Like any investment, it presents risks: the return on investment is not guaranteed. However, cultural investment presents some very specific challenges because of its nature.

First, a political risk is undeniable, as the general public continues to perceive culture as superfluous, secondary or the preserve of the affluent. Culture is classed as subsidiary and non-essential.

Second, such an investment presents a social risk, as artistic intervention has the potential to challenge perceptions and undermine preconceptions and mental habits. It takes an alternative look at familiar places, with the associated risk of denaturing them and offending sensibilities. This is the danger that results from entrusting the keys and image of the city to the professionals of 'disruption', the custodians of viewpoints that may be critical, acerbic, benevolent or off-beat.

The political authorities, especially in European cities, have understood the strategic importance of cultural investment in urban development policy, because the disruptive nature of artistic and cultural activity produces economic and social innovation in a way that no other investment can do. By identifying the conditions for making cultural policy a key element in a policy of sustainable urban development, Mons 2015 is set to become a textbook case. This is not merely fortuitous, as in Bilbao, where the city has subsequently managed the investment made by the Guggenheim Foundation, but the result of political will to put the cultural dimension at the heart of urban policy.

Numerous examples show how a cultural investment that is properly managed from a financial viewpoint produces a set of impacts in terms of economic prosperity, jobs or entrepreneurial vocations in the creative economy. Properly integrated into urban development strategy, cultural investment is a source of regional attractiveness for visitors and investors. When it lives up to local popular expectations, it is also a source of a change in attitudes that generates spirit cohesion, pride and collective aspiration. There can be no development without self-confidence and confidence in the potential of others.

As such, cultural investment is a highly political matter, because the transformation that is generated is profound. The returns will relate not just to the ability to develop a product or an offering that is capable of gaining market share in the next three or five years with a view to maximising profit. They will be based on the ability of the investment to transform the local habitat, the quality of life, to change minds, to encourage risk-taking and to promote creativity and entrepreneurial spirit. They will also be based on its ability to offer opportunities for greater citizen participation. Such an investment is both physical (involving the promotion of the urban heritage, for example) and emotional (through its aesthetic shock value and the collective experience it generates).

In this respect, cultural investment is unique. The difficulty of measuring its many and various impacts is a source of mistrust. This difficulty arises because the effects are largely intangible compared to those of other forms of investment, and qualitative data (used to measure intangibles such as social effects) do not create the certainty produced by quantitative data. Culture also suffers from the lack of a statistical tool, because of the continuing and excessive preoccupation of statistics with the production of material wealth¹.

Despite this, Mons 2015 is a perfect example of a cultural investment whose impact extends beyond the protection of the historical heritage and the development of tourism, the functions usually assigned to culture from an economic viewpoint. The data show the effects of the investment on urban planning, the development of the economic fabric and entrepreneurship (the SMEs in the cultural and creative industries that play a vital role in the digital economy), employment, the ability to attract foreign investment (IKEA, Google and Microsoft in the case of Mons) and the spill-over effects on other economic sectors in search of innovation (see next section).

¹

KEA, Feasibility study on data collection in the cultural sectors in the EU, European Commission, September 2015
<http://www.keanet.eu/wp-content/uploads/CCS-Stats-Study-final-30092015.pdf?4f4eb7>

Our study of the leverage effect of investment in Mons 2015 shows that every euro invested generated 5.50 euros of additional wealth in the Belgian economy.

Mons 2015 represents a cultural investment of 70 million euros. That is a substantial sum given the size of the population of Mons, and makes the city a contender for the distinction of having made the largest cultural investment per capita of any European Capital of Culture in recent years .

Comparison of actual ECoC budgets in constant euros

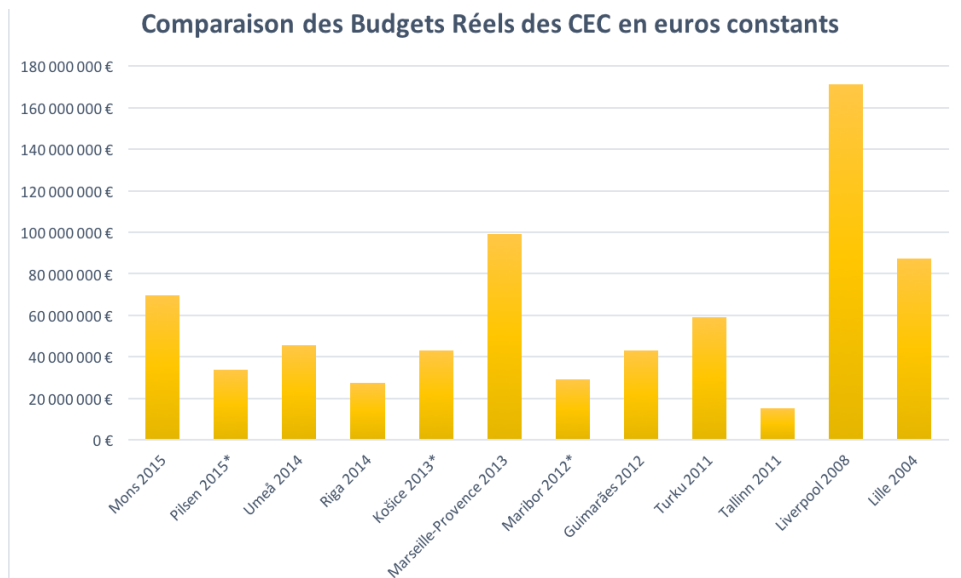


Image 1: Comparison of actual ECoC budgets in constant euros (sources: the Mons 2015 Foundation, Pilsen 2015 (2010), ECORYS (2015), EC (2014), EC (2013), EC (2012), Garcia, Melville & Cox (2010), Bilan Lille 2004).

These figures, when compared with local demographics², show that in relative terms the budget per capita of Mons 2015 ranks first, with 750 euros raised per inhabitant. This budget is well ahead of large cities such as Lille 2004 (86 euros per capita), Liverpool 2008 (202 euros) and Marseille-

² The local population refers to the number of inhabitants in the city/municipality concerned in the year in question, except for Marseille-Provence, Lille and Liverpool, as their ECoC projects related to their respective urban/metropolitan territories. The number of inhabitants is thus that of the urban areas of Lille, Liverpool and Aix-Marseille-Provence. The actual budgets in current euros come from the sources for Image 3, which are then converted into constant euros.

Provence 2013 (54 euros). Mons 2015 was ambitious in its programming. That ambition, which was successfully achieved both financially and artistically, has reaped rewards beyond the most optimistic forecasts .

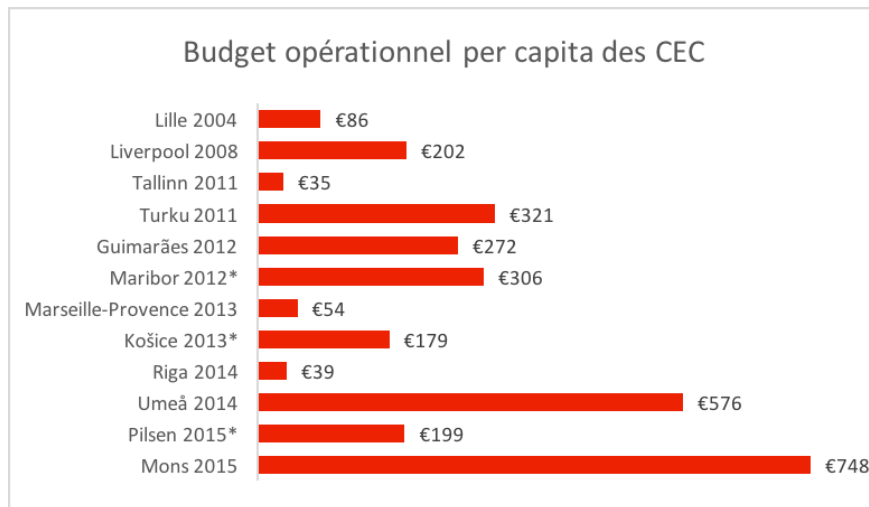
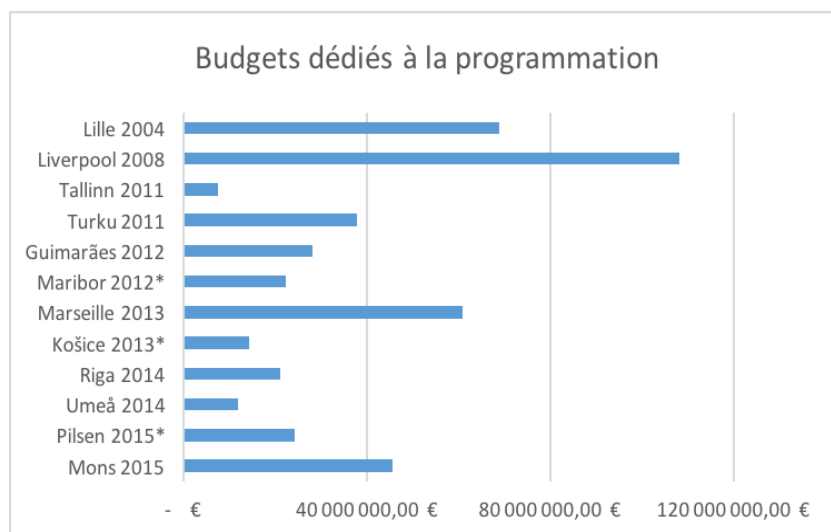


Image 2: Operational budget per capita of ECoCs (source: author's calculations based on raw data from the Mons 2015 Foundation, Pilsen 2015 (2010), ECORYS (2015), EC (2014), EC (2013), EC (2012), Garcia, Melville & Cox (2010), Bilan Lille 2004).

Expenditure on the programme put the Mons 2015 artistic budget among the best funded of recent ECoCs, just behind Liverpool 2008, Marseille-Provence 2013 and Lille 2004 in absolute terms and in constant euros .

Image 3: Programme budgets (sources: the Mons 2015 Foundation, Pilsen 2015 (2010), EC (2014), EC (2013), EC (2012), ECORYS (2011), Garcia, Melville & Cox (2010).



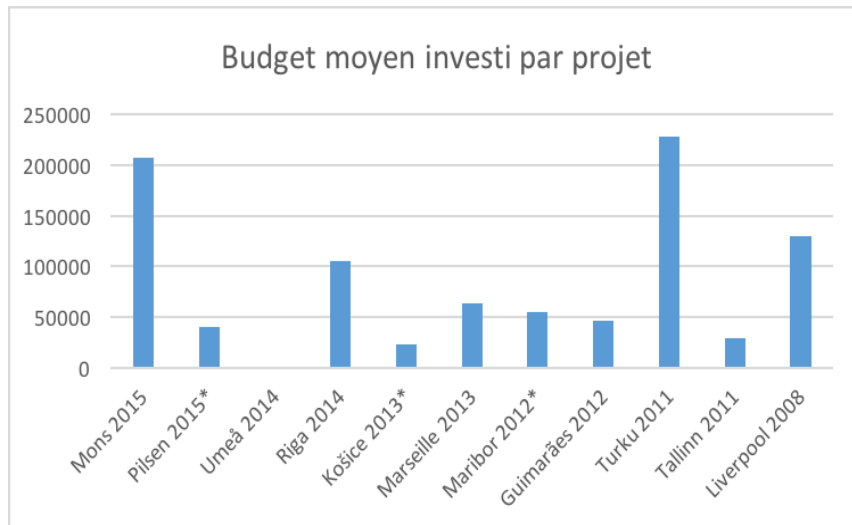


Image 4: Average budget invested per project (source: author's calculations based on data from the Mons 2015 Foundation, Pilsen 2015 (2010), EC (2014), EC (2013), EC (2012), ECORYS (2011), Garcia, Melville & Cox (2010), EP (2013)).

In addition to the operational budget, Mons 2015 mobilised substantial public funding (170 million euros) to enrich, enhance, renovate and diversify the tourism infrastructure and attractiveness of the city.

In absolute terms, the amounts invested in infrastructure work put Mons at the high end of the average for ECoCs (145 million euros).

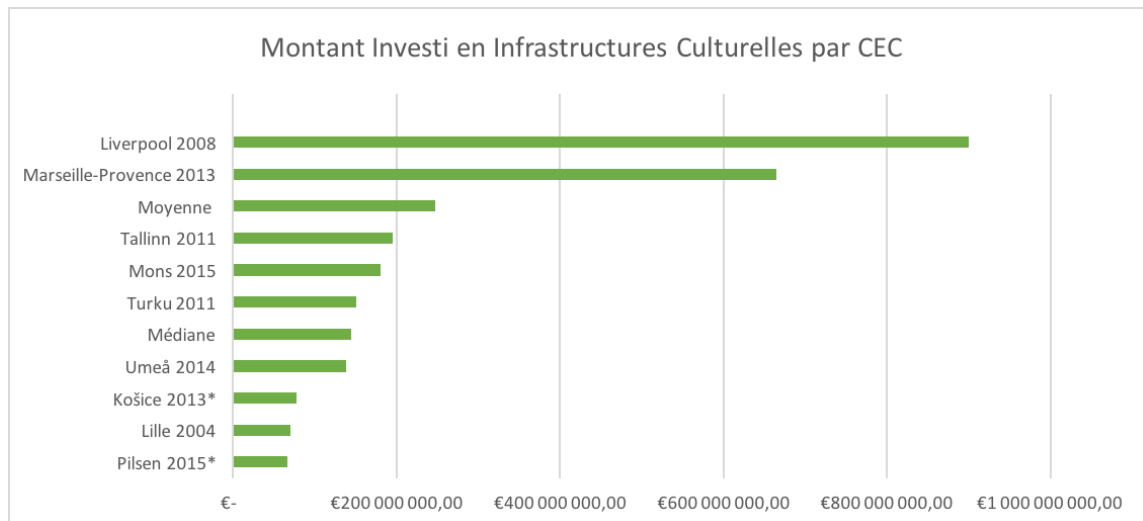


Image 5: Value of investments in cultural and tourism infrastructure (source: author's calculations based on data from the Mons 2015 Foundation, Pilsen 2015 (2010), EC (2014), EC (2013), EC (2012), ECORYS (2011), Garcia, Melville & Cox (2010), EP (2013)).

Relative to the size of the city, Mons 2015 is the leader for infrastructure investment per capita: 1,800 euros per inhabitant. This is more than twice the average amount invested by ECoCs in the last five years (700 euros per capita).

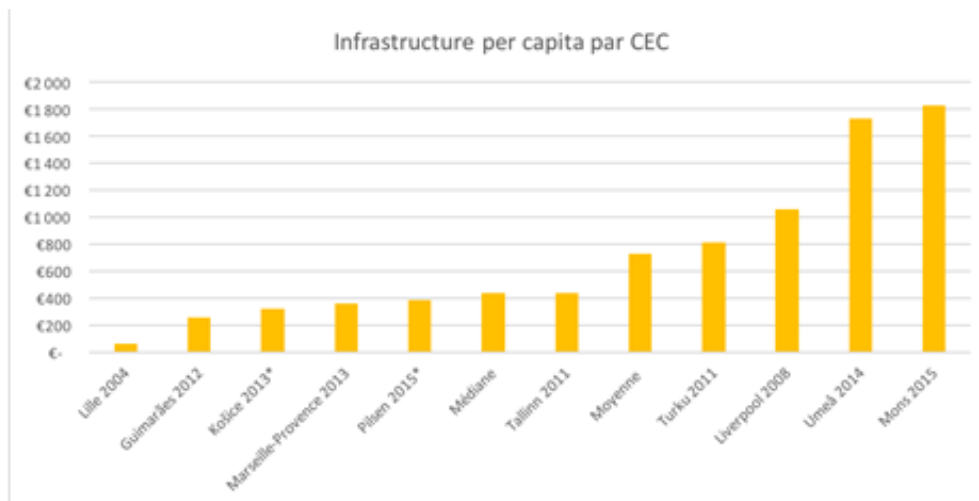


Image 6: Infrastructure per capita (source: author's calculations based on data from the Mons 2015 Foundation, Pilsen 2015 (2010), EC (2014), EC (2013), EC (2012), ECORYS (2011), Garcia, Melville & Cox (2010), EP (2013)).

The assessment also helps to identify the conditions for limiting the risk of the cultural investment, and in particular the economic and financial risk. To mitigate this risk, the relationship of trust between the investor, in this case the representatives of the public authorities (especially the mayor), and those in charge of implementing the artistic programme, is vital. As with any investment, the experience of the management teams is of major significance in the decision to go ahead, especially when considering the sustainability of the impacts. Success depends on the ability to develop a common vision that can transform an intervention that is a one-off occurrence (being related to a single event) into a force that will boost the region and its civic and entrepreneurial energy over the long term.

In Mons 2015, this intervention was developed around four themes:

- encouraging freedom of individual creativity in a way that reflected the history and sociology of the city in order to make the intervention immediately relevant in the eyes of the public, whether in order to provoke questioning and reflection or out of a desire to harness art's emancipatory power;
- taking advantage of the artistic heritage, places and public spaces, works, and local and international artists in order both to create social ties and share an emotion or a moment of enjoyment and to reclaim the local area and its space;
- involving local people in setting up projects, in order to put collective creativity to work;
- providing access to culture to as many people as possible: 80 percent of the activities in Mons 2015 were free.

The impact of the artistic interventions was reflected in the harnessing of creativity as a tool for communication. Generating social ties and shared involvement, creativity is capable of restoring meaning to life in the city, of bringing hope and added confidence in the ability of the city and its inhabitants to create, welcome and attract.

In the case of Mons 2015 the 'risk of the cultural investment' was extremely well managed; the approach used should serve as a model in development strategy for all cities regardless of size:

- a budget that had been guaranteed well in advance, thus lending confidence to those doing the programming work;
- a cultural policy integrated in the development strategy, which had been decided on ten years earlier and which among other things helped to attract foreign investors;
- a close relationship between the political and artistic sides of the enterprise, which worked together in a relationship of mutual trust,

- a consistent endeavour to avoid compromising the artistic work and creativity, while preserving access to culture for as many people as possible and implementing a model of sound financial and economic management that was kept separate from the teams responsible for the artistic side;
- an ecosystem that placed value on all forms of innovation and creativity (Creative Valley - Digital Valley etc.), thus creating opportunities for interfaces and collaboration between the artistic, the scientific and the technological. This will be developed as part of Mons 2025, the programme designed by the municipality and intended to perpetuate the achievements of Mons 2015.

Mons 2015 did not succeed completely in every respect. We cannot claim to have controlled the scope of the intervention and cultural practices in its entirety. This experience gave the city the opportunity to discover new ways of consuming or experiencing culture, and the Foundation was positively surprised by the popular success of certain initiatives that, while less eye-catching, were nonetheless deeply rooted in the need for social exchange and interaction in the city; in many cases, these resulted from citizen initiatives (such as the Hanging Garden and the Literary Café).

To quote the General Commissioner, Yves Vasseur, 'Mons 2015 showed that there was a strong demand for friendly contact and the social bond. The major exhibitions were needed to attract visitors and justify trips to Mons. However, cultural actors need to rethink their model and work on smaller projects that can respond to this demand for exchange and sharing'³. Culture is an essential tool of social contact, and this function has become as important as access to knowledge and beauty. This is a key lesson of Mons 2015. People want to meet, share, celebrate and prepare celebrations together. This fact is reflected in the cost/attendance ratio of events .

Table 1: Cost/attendance ratio of events

	Attendance	Budget	Attendance/budget ratio
Literary Guinguette	33,000	€166,200.00	0.20
Hanging Garden	30,000	€165,944.50	0.18
City at Play	70,000	€440,125.38	0.16
Café Europa	30,000	€523,884.46	0.06
Van Gogh	180,000	€3,279,715.84	0.05

Source: Mons 2015 Foundation – Calculations by KEA.

The *Grand Eight* and *Grand Ovest* projects, *The Phrase* (a project in which poetic phrases were displayed on the walls of the city, making its buildings 'recite poetry'), but also the festivals and urban installations (including Arne Quinze's monumental sculpture *The Passenger*) represented part of the same approach. They were projects rooted in the territory, created and developed for or by the people of Mons in an attempt to challenge the public and transform the city into a space capable of stimulating imagination, questioning and alternative ways of looking at things and situations. For the people of Mons, this project was an opportunity to reclaim their living space. The future will reveal the impact of that reappropriation on the collective mindset.

It should be stressed that the city of Mons only invested 3 million euros out of the total investment of 70 million euros – less than 5%. The city was able to limit its financial risk by a clever strategy of using regional and European funds. The ERDF funds from the European Union were the main drivers of cultural investment. The use of the funds was planned very early in the process: as early as 2008, the Mons 2015 Foundation knew what most

Interview with Yves Vasseur, 14 December 2015, Mons.

of its operational budget was, and was able to work with confidence on planning the event.

Ultimately, the risk to the city was not financial, but rather related to its ability to organise and manage such a programme and such a large number of events given its size, and to its administrative capacity and its experience in terms of welcoming visitors and communicating. Our assessment shows that Mons 2015 handled this task very well. This confirms that the implementation of such an international event is within the reach of small and medium-sized cities.

SECTION 2: WHEN THE TITLE OF EUROPEAN CAPITAL OF CULTURE REALLY PAYS DIVIDENDS

Mons 2015 shows the capacity of the 'European Capital of Culture' title to transform urban development significantly, even radically. In this respect, the title has proved to be a remarkable change accelerator.

2.1 Economic and social benefits

Mons surpassed its initial objectives in terms of numbers of Belgian and foreign visitors and of the popular success of the events on the programme, thanks to the high degree of confidence within the population about the city's capacity to manage this type of event and demonstrate that it is a 'destination city' – one worth visiting in its own right – as well as a stop-over.

During the first six months of 2016, the number of visitors to the tourist office increased by 40% compared with the first six months of 2014, although the weather was particularly bad.

Table 2 Change in numbers of visits to the Tourist Office in the first six months of 2014 and 2016

	January	February	March	April	May	June
2014	3671	2838	3673	3745	4532	4857
2016	4137	4833	4730	4914	9175	4528
Change %	13	70	29	31	102	-6.7

Source: Mons Tourist Office

All the data are included in Report 4. In this report, we wish to highlight the following points:

- The total accumulated economic impact of Mons 2015 is equivalent to an increase of 850 million euros in the volume of national wealth produced/created since 2005.
- The contribution of Mons 2015 to the gross value added (GVA) is estimated at 295 million euros.
- Every euro invested in Mons 2015 by the public authorities generated 5.50 euros in the Belgian economy (leverage effect).
- Mons 2015 directly or indirectly created 380 jobs per year (equivalent persons per year) from 2005 to 2015, with a peak of 2,000 jobs created in 2015.
- Mons 2015 contributed to an income increase of 140 million euros in favour of Belgian households.

The average economic impact is estimated at 77 million euros per year between 2005 and 2015, with a peak of more than 400 million euros in 2015 (Chart 7). The variation of these impacts over the past 10 years and their concentration in the post-2011 period is due to the acceleration of the preparation work for 2015, and the growth in infrastructure investment and artistic spending on the part of the Foundation in 2014-2015 and on the part of visitors in 2015.

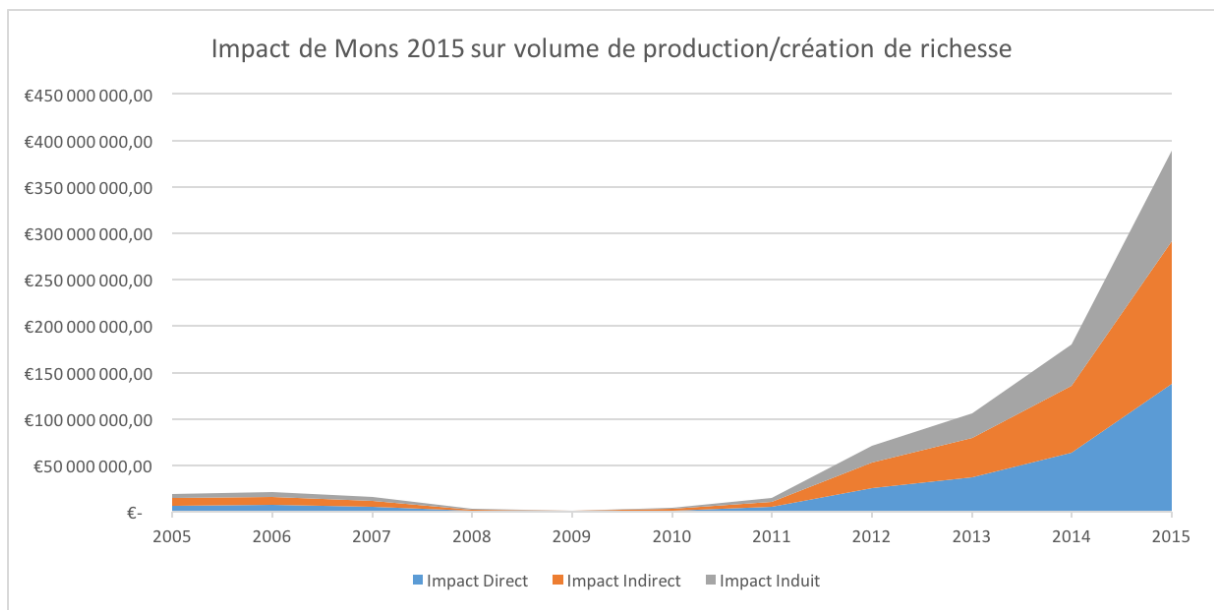
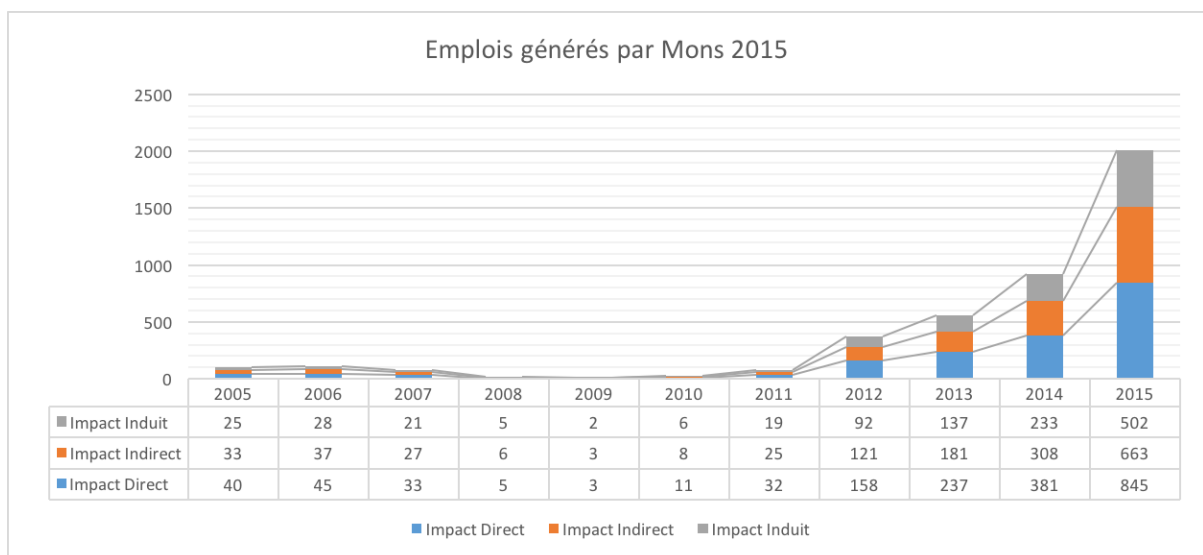


Image 7: Impact of Mons 2015 on wealth production/creation volume per year (source: KEA)

Thanks to this increase in economic activity, Mons 2015 generated an average of 380 jobs per year (full time equivalent) from 2005 to 2015. Mons 2015 directly and indirectly created 800 jobs (equivalent persons per year) between 2011 and 2015 and around 50 in the previous period. In 2015, about 2,000 jobs were created by Mons 2015.

Image 8: Jobs generated by Mons 2015 (source: KEA)



2.2 Citizen participation – a lever for better governance of the city and a positive attitude to change

If the ECoCs of the last five years plus Lille 2004 are compared and the ratio of the total number of participants to the number of inhabitants is calculated, Mons 2015 did much better than the other ECoCs (see Table 1⁴), although this finding must be treated with caution due to differing measurement methods.

European Capital of Culture	Participation	Inhabitants	Participants per habitant
Lille 2004	9,000,000	1,015,744	8.86
Tallinn 2011	2,000,000	440,043	4.55
Turku 2011	2,000,000	184,190	10.86
Guimarães 2012	2,000,000	158,124	12.65
Maribor 2012	3,800,000	95,881	39.63
Kosice 2013	NA	240,688	NA
Marseille-Provence 2013	11,000,000	1,831,500	6.01
Riga 2014	1,600,000	696,593	2.30
Umeå 2014	800,000	79,594	10.05
Mons 2015	2,182,622	95,349	22.89
Pilsen 2015	NA	169,033	NA

Table 3: Participants in events relative to number of inhabitants. (Sources for participation figures: EC (2015) for Riga 2014, Umeå 2014; EC (2014), for Marseille-Provence 2013, Kosice 2013; EP (2013) for Lille 2004, Tallinn 2011, Turku 2011, Guimarães 2012 and Maribor 2012; the Mons 2015 Foundation.

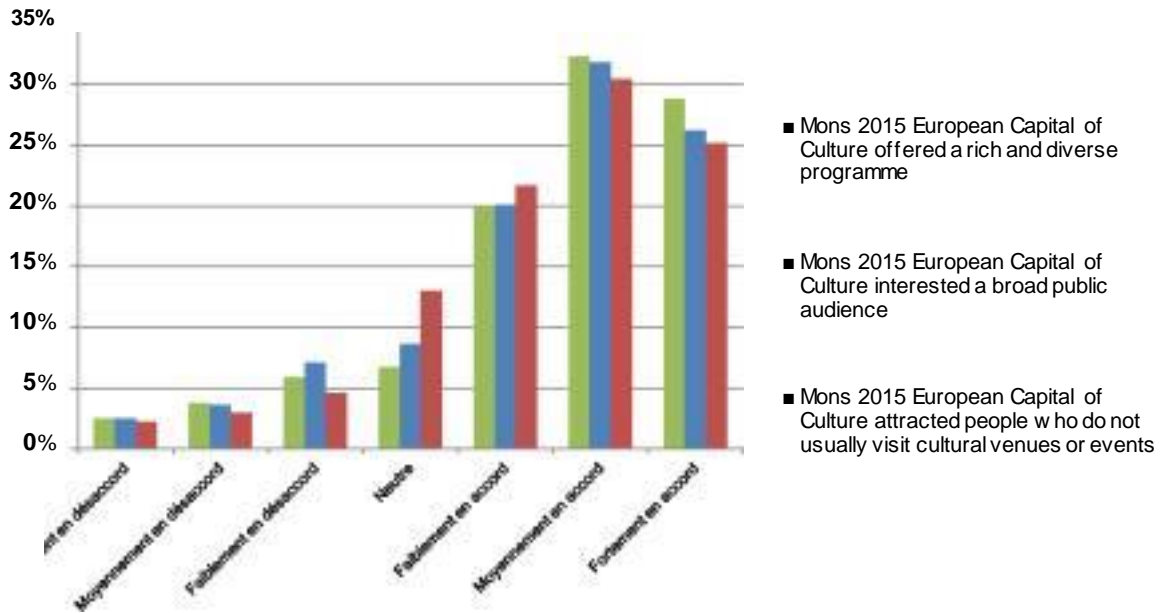
The impact study shows that

- Participation by the local population was very high: of the 191,020 tickets purchased in Wallonia, 126,954 (66%) were purchased in Greater Mons.
- Mons 2015 appealed to people of all ages, with a more or less equal proportion of men and women, but with a greater presence of adults aged 36-45 years and older people over 65 years, representing 31% and 32% respectively of the participants in our sample.
- In addition,
 - o according to 81% of responses, Mons 2015 offered a rich and diverse programme;
 - o according to 78%, Mons 2015 interested a broad public audience;
 - o according to 77%, Mons 2015 attracted people who do not usually visit cultural venues or events.
- Mons 2015 increased the interest in culture of 32% of respondents.
- 7,590 voluntary contributions were recorded in the course of 2015.

The results of the survey conducted among the residents of Greater Mons in 2016 confirm the superb level of participation by the local public: 90% of respondents participated in at least one Mons 2015 event. This result is excellent considering the results of previous ECoCs where citizen participation was recorded⁵.

⁴ Methodological note: the number of inhabitants refers to the number of inhabitants in the city/municipality concerned, except for Marseille-Provence and Lille, as their ECoC projects related to their respective urban territory (the number of inhabitants is thus that of the urban region).

⁵ Guimarães 2012 (74.9%), Umeå 2014 (70%), Maribor 2012 (53%) (European Parliament, 2013; European Commission, 2015).

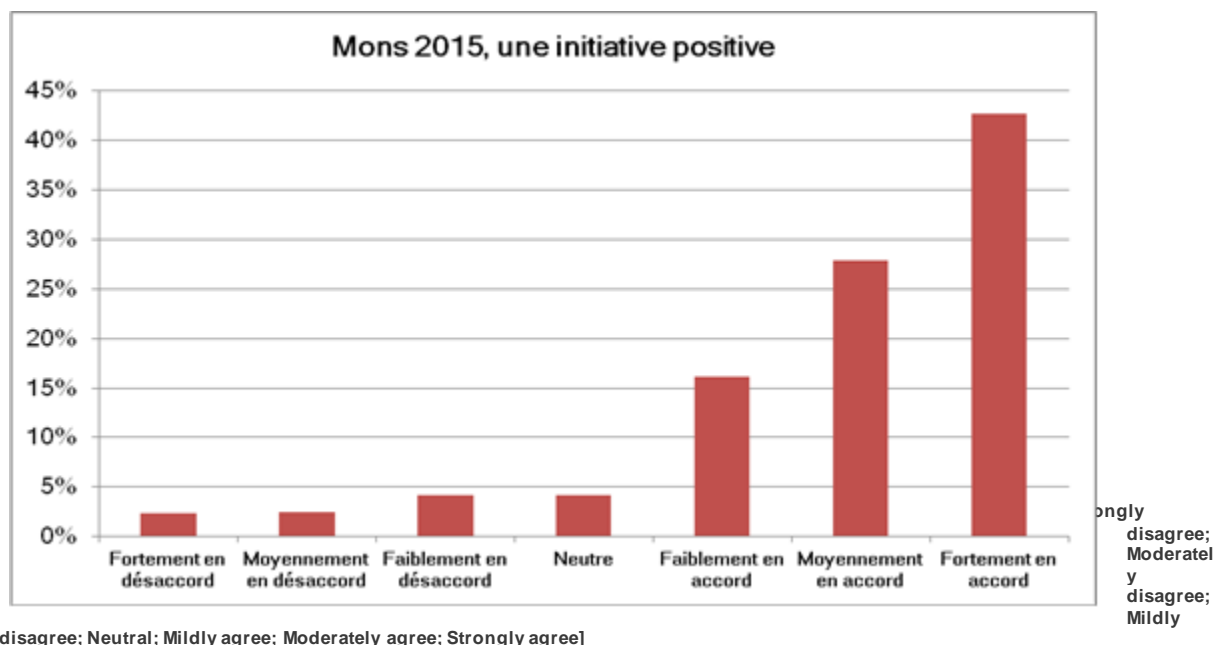


[Strongly disagree; Moderately disagree; Mildly disagree; Neutral; Mildly agree; Moderately agree; Strongly agree]

Image 9: Survey of residents of Greater Mons, programming, level of interest, attractiveness
 Source: KEA, Survey of Residents of Greater Mons, 2016

68% of respondents believed that Mons 2015 contributed to participation and social inclusion⁶.

The statement that Mons 2015 was a very positive initiative for the people of Mons was agreed with by 86% of respondents; 43% strongly agreed with this statement.



[Strongly disagree; Neutral; Mildly agree; Moderately agree; Strongly agree]

Image 10: Mons 2015, a positive initiative
 Source: KEA, Survey of Residents of Greater Mons, 2016

⁶ with 10.14% 'strongly agreeing', 36.23% 'moderately agreeing' and 22.46% 'mildly agreeing' (Source: KEA, Survey of Residents of Greater Mons, 2015)

The rise in the response rate to field surveys is very strongly correlated with the increasingly positive experience of locals in contact with the events on the artistic programme. Thus the widespread scepticism at the outset gradually gave way to enthusiasm. Mons 2015 therefore convinced people in practice.

Interestingly, the percentage of locals who were satisfied with Mons 2015 was higher in 2015 than in 2016 (86%

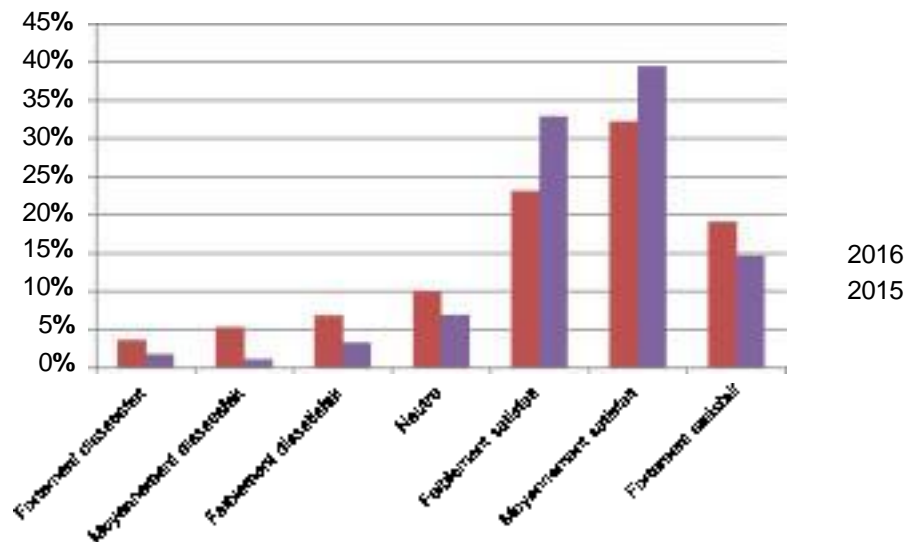


Image 11: Level of satisfaction of the people of Mons 2015/2016

Source: KEA, Survey of Residents of Greater Mons, 2015; 2016.

against 74%). This reflects a scepticism about the ability to perpetuate the achievements of Mons 2015⁷.

We interviewed the residents of Greater Mons in order to understand the characteristics of this positive contribution to people's well-being and quality of life. Well-being is measured here on several dimensions, including economic (the revitalisation of the city and region, the economic impact on the city, job creation) and social (the contribution to the sense of belonging and inclusion).

- 72% of residents in the survey agreed with the statement 'Mons 2015 will help revitalise the city and the Walloon Region in 2015 and afterwards'.
- 67% of respondents believed that Mons 2015 helped develop a sense of belonging (already very strong in the region which, despite the economic difficulties, has experienced a population increase) and pride of the people of Mons.
- However, the population expressed more scepticism about whether 'everybody benefited from Mons 2015': only 7% of respondents 'strongly agreed' and 16% 'moderately agreed' (Source: KEA, residents Survey Greater Mons, 2016).

Mons 2015 transformed the city's image in the eyes of its inhabitants. 80% of those surveyed said they were very proud of its attractiveness as a cultural and tourist venue and thought that the event portrayed the city in a positive and dynamic light. Nationally, Mons 2015 especially strengthened Mons' positioning as a city of culture. In the view of almost all the partner institutions and members of the Mons 2015 Club (a business club), Mons singularly contributed to improving the image and reputation of the city.

⁷ The analysis was based primarily on surveys of residents of Greater Mons in 2015 (274 respondents) and 2016 (718), and the round tables held with the public in 2012, 2015 and 2016. The quantitative data were provided by the Mons 2015 Foundation.

The assessment measures revealed a strong disconnect between the way the city was perceived by outsiders (very positively) and by residents (more critically). Mons 2015 led to people discovering a different view that was optimistic and benevolent of a city that had been losing confidence and was sceptical about its appeal. While confidence is a vital factor in economic and social recovery, culture has made it possible to turn back the tide of gloom. The idea of a 'renaissance' is uppermost in people's minds.

Expectations are now high. This expectation is fertile ground for mobilising support and drawing on a new solidarity born of a rich collective experience. Mons 2015 generated the desire to continue, the desire to be ambitious. In this respect, the latest opinion polls express citizens' concerns about the ability to continue the momentum of the Capital year; the people of Mons have expressed a fragile optimism that must be consolidated.

2.3 Mons – a destination city

Mons 2015 attracted a total public of more than 2.1 million visitors (number of tickets sold + free entries). Of these, it is estimated that the number of arrivals in the city of Mons in 2015 (i.e. the number of people who spent at least one night in Mons) was 92 246⁸ (up 16% on 2014).

It should also be noted how much Mons 2015 was enjoyed by visitors and tourists. Analysis of the numbers visiting the Tourist Office 'VisitMons' shows that it attracted 156,966 people⁹ in 2015, up 211% on 2014 (Source: Tourist Office). This is a much higher increase than that recorded during Lille 2004 (822,942 visitors to the Tourist Office, 167% more than in the previous year; Source: Indicateurs de Lille 2004) and far greater than that recorded in Marseille 2013 (457,645, up 27.7%; Source: MP2013: L'Évaluation) or Guimarães 2012, for example (121,435 visitors, up 120%; Source: Guimarães 2012 - Relatório Executivo) – even when we consider that Marseille and Guimarães are destinations with a stronger tourism potential. Equivalent figures for other ECoCs from the last five years are not publicly available.

⁸ July 2016 Statbel figure for hotels and guesthouses licensed in the municipality of Mons only.

⁹ This figure probably includes local people, as the Tourist Office was an information and advice centre for Mons 2015 events during 2015.

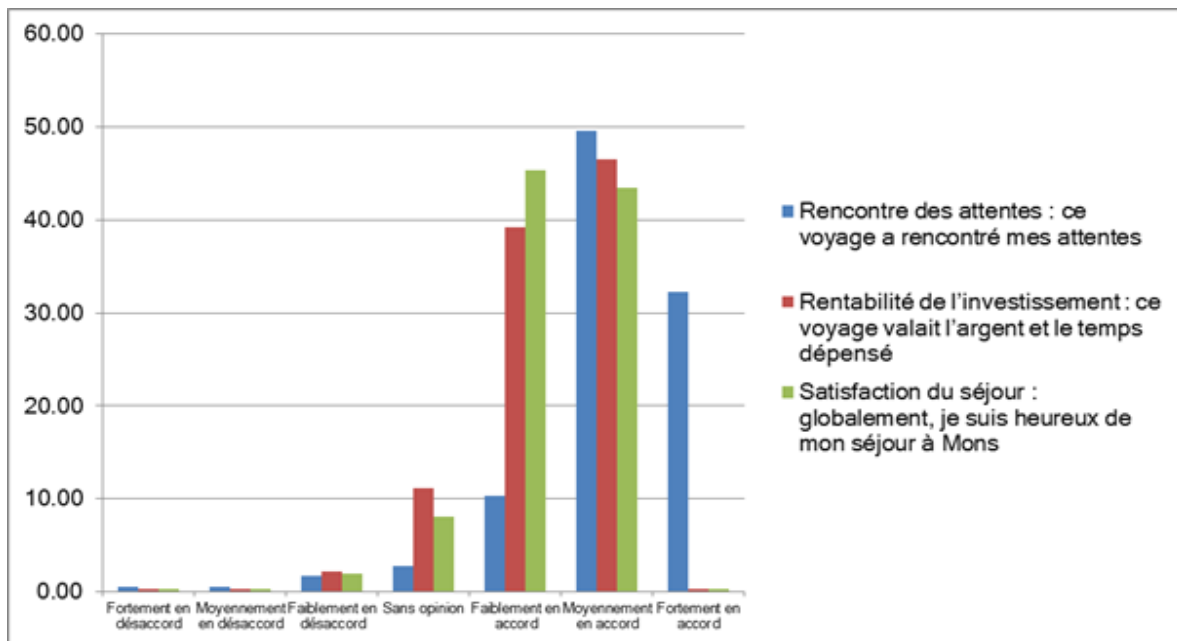
Table 4: Change in number of visits to tourist offices

	Year before ECoC	ECoC year	Change <%>
	Total visitors	Total visitors	
Lille 2004	308,000	822,942	167.189
Guimarães 2012	55,206	121,435	119.967
Marseille 2013	361,091	457,645	26.73952
Mons 2015	50,496	156,966	211

Sources: Indicateurs de Lille 2004; MP2013: L'Évaluation; Guimarães 2012 - Relatório Executivo; Tourist Office 'VisitMons'

In terms of satisfaction, tourists were very positive about their stay in Mons, with a satisfaction rate of 82%¹⁰. In addition, 86% of visitors surveyed expressed satisfaction about value for money (with 47% giving very favorable responses). Finally, the rate of agreement with the statement about satisfaction with their stay was around 90%.

Image 12: expectations, value for money, satisfaction with their stay



Source: KEA survey of tourists, 2015

¹⁰ Agreed (49.58%), and strongly agreed (32.21%) w ith the statement.

Visitors and tourists felt that Mons can claim to be a cultural and tourist destination. The level of agreement with the statements in the survey is even higher than for the city's residents .

Mons 2015 generated a total of 75 million euros of spending by tourists .

Mons' image before and after Mons 2015

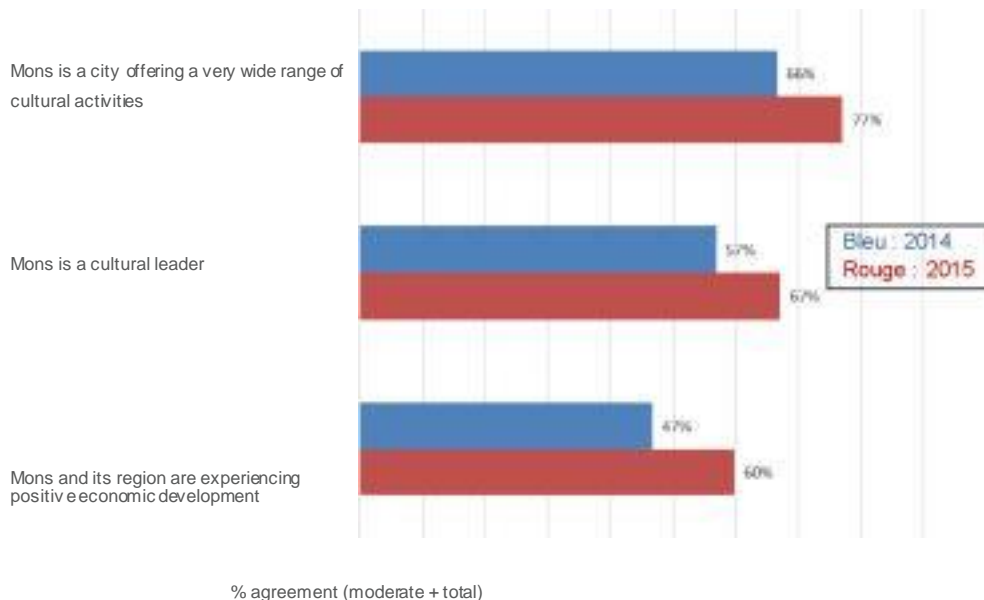


Image 13: The image of the city of Mons before and after Mons 2015
Source: Surveys of profile in Belgium, Mons 2015 Foundation (2014, 2015)

SECTION 3: THE CHALLENGES OF THE ASSESSMENT PROCESS

The main objective of this report was to quantify the economic and social impact of Mons 2015 and to assess the work of the Mons 2015 Foundation independently. However, the report was also intended to identify assessment difficulties for European Capitals of Culture in order to offer recommendations to the authorities on how to gain a better understanding of the various ways in which cultural investment adds value, and to share that knowledge with local people.

There are numerous difficulties with assessing a European Capital of Culture. Here are just a few of them:

- The limit of the assessment's time-range (as the assessment ended in April 2016), whereas the effects of Mons 2015 on many economic actors will be more noticeable in 2016, and the impacts on society will be slower to produce significant effects. Moreover, the national economic statistics on 2015 have been updated late and were not available for the delivery of the final report, making comparison with 2012 impossible.
- The local authorities only became interested in the assessment exercise at too late a stage, when it was time to communicate the tangible impacts to the press and the voters. Sources of social and economic information should be mobilised earlier in the process, as this helps raise actors' awareness of the benefits of participating in the assessment. The assessment will then be seen as less intrusive by stakeholders, who often justify their reluctance to participate for reasons of confidentiality in respect of competitors (and the tax authorities). Proper collaboration in data collection could contribute to the participatory formulation of measures to ensure the perpetuation of the positive developments generated by ECoC. In addition, it would be likely to create economic solidarity at local level from which the cultural sector and the authorities would benefit.
- The official data at national and local level are insufficient. For example, there are no official data on the number of daily visitors. The counting of the number of visitors is restricted to those staying in a hotel. This is disadvantageous to smaller towns, where people often visit without staying the night. In addition, the contribution of the cultural and creative industries is insufficiently understood by the statistical tool (KEA, 2015). Cities should consider establishing their own statistical tool that is capable of replacing the incomplete official data.
- Cultural institutions should make greater efforts to collect sociodemographic information on participation in cultural events in order to better understand changes in the public and its cultural practices.
- Cities should use resources to measure the impact of cultural investment on cross-sectoral partnerships, on the networking of people and institutions and on new forms of participation generated by the ECoC.
- Mons 2015 is expected to expand the field of study of the social impact of cultural investment (including on poverty). For the sake of greater depth, it should assess the significance of the event for disadvantaged people.

We hope that this report will serve as an inspiration in the development of strategies and action plans for upcoming European Capitals of Culture in order to improve the measurement instruments relating to cultural investment.

GENERAL CONCLUSION – PEOPLE AT THE HEART OF DEVELOPMENT

This final report shows the importance of cultural investment in innovation policy in all its dimensions. Culture is a powerful force for modernised, participatory governance; it highlights the importance of creativity and imagination in times of crisis, and the role of experimentation and risk-taking that belongs to the entrepreneurial and artistic spirit. Its expression is a factor of social cohesion without which scenarios for the future of our cities are inconceivable.

Culture helps change attitudes more effectively than any regulatory measure or political slogan-making. It mobilises citizens and turns them into strategic innovation partners. It gives meaning to technological developments. It allows cities to differentiate themselves and hence make themselves more attractive. There can be no 'smart city' without an appropriate cultural offering. The appropriation of a place's cultural resources is a necessary condition for the establishment of an environment propitious to innovation. The most innovative cities are the most cultural cities. The lack of culture and of the promotion of creative ideas undermines competitiveness. Culture as a point of differentiation is a key driver of innovation.

Mons has shown its desire to influence its destiny by choosing to mobilise its cultural and creative resources. Every place has equivalent resources. The success of Mons 2015 will serve as an example. It should also inspire the political courage to believe in culture and its practitioners as driving forces of change and innovation.

The European Capital of Culture year is just one step in the creation of an ecosystem that sets a value on mutual enrichment between skills and occupations, a form of governance that has demonstrated its ability to get civil society, communities, companies and institutions working towards a common goal. This impressive movement of popular collaboration is the precursor to a situation where the intelligence of the whole community is being used in the interests of the city. As such, cultural investment is a driving force for social innovation – innovation that increases society's capacity for action.

No doubt those who idolise technocratic thinking will attribute the economic recovery of Mons to the investments of IKEA or Google or to funding from the ERDF. But they will be wrong if their disregard of the cultural factor has made them forget the impact of the energy expended by a band of acrobats who brought to life the idea that Mons is a space for creativity, with the dynamism to innovate and transform itself.

The figures that have been highlighted in this assessment cannot fail to impress. They suggest that Mons can become a destination city (instead of a mere stop-over), a city that is attractive because of its quality of life, its ability to attract investors and its unparalleled cultural offering for a city of this size.

What it cannot do, however, is quantify the optimism, the degree of pleasure and excitement generated by Mons 2015. This cannot be done with statistics. Mons' ambition was to give pleasure to locals who had been hard-hit by successive economic crises. There was a need to restore to the people of Mons their pride, to give them a sense that decline was not inevitable, but that excellence, beauty, imagination and enthusiasm are integral to this place. Mons 2015 revealed the potential that will help generate new momentum, new vocations and ambitions. New Van Goghs will be revealed.

The strength of Mons 2015 is that it was designed from the start as a beginning, a platform from which to take flight towards brighter horizons and design a future characterised by less resignation.

Mons, it turns out, did not celebrate for the sake of celebration. The city has been strengthened for years to come :

- by the regeneration of a superb artistic and cultural heritage which makes Mons a destination city,
- by creative venues and artistic teams capable of appealing to the general public and bringing culture into the streets without any compromise, to allow art to play its role as a regenerator and a giver of meaning,
- by a sense of confidence and pride that can mobilise civic energy and reinforce social cohesion,
- by human resources skills in the management of multidisciplinary projects and communication,
- by an administrative organisation and management teams that have proved their ability to carry out an international project,
- by the image of an ambitious city that is attractive to visitors and investors .

Managing success is not easy, because expectations increase. The requirements to be satisfied become far stricter. The challenges are still considerable :

- making the infrastructure economically viable so that its management cost does not undermine investment in creative work.
- continuing to exist as a place of culture with the power to attract tourists, in order to justify further private investment in reception and other services aimed at visitors .

However, the opportunities are numerous too :

- making the city a space for creative experimentation, bringing together technology companies and creative workers to establish an ecosystem of cross-disciplinary, participatory collaboration that will accelerate the emergence of new players in the new economy.
- the Digital Innovation Valley that has been 'built' around the Initialis science park and which today has some 80 SMEs, micro-enterprises and start-ups in the digital field, as well as the Microsoft Innovation Center (MIC), Technocité, the Euro Green IT Innovation Center and Google's servers nearby;
- the new Creative Valley initiative, which aims to connect all the area's cultural and creative resources in order to contribute to innovation, including the city's museums, creative businesses, UMons, ARTS2, training and research centres such as Technocité or Numédiart, specialist intermediaries such as La Maison du Design or La Maison de l'Entreprise, and incubators and co-working spaces in the city and region;
- a growing supply of 'spaces' where young start-ups and more mature businesses can work together, including: the incubator at the Technocité training centre; the new start up incubator launched in 2016 in the old Manège de Sury, Initialis Science Park near Les Grand-Près and a technology incubator; the LME Business Innovation Centre (BIC) which hosts young innovative companies; the incubation space of La Maison du Design (with five offices, nine workshops, three meeting rooms and the co-working space Co-nnexion);

- establishing Mons' place in the network of European and international cities with a view to sharing the challenges of urban development and drawing inspiration from solutions employed elsewhere. Openness to international developments is one of the gains of Mons 2015. This legacy, which is a superb driver of innovation, must now be brought alive.

It is certainly true that Mons 2015 could have done more to involve SMEs from the cultural and creative sector in the planning and implementation of the year. This is not unique to Mons, as artistic and cultural institutions generally need to learn to work more with the world of creative businesses (digital, video games, design, TV and radio, communication). This consideration is further addressed in the context of Mons 2025¹¹.

Finally, Mons 2015 must be appreciated in its context in order to understand the scale of the initiative and its significance well beyond the microcosm of Wallonia and Belgium. Mons 2015 showed that Europe is not only Lampedusa, the barbed wire at the borders of Schengen, the Greek crisis, Brexit, indifference, selfishness, racism or decline.

Mons 2015 was a moment of grace in a changing world that:

- brought alive the European spirit and its humanism by reminding us of Verlaine's poetry and Van Gogh's painting;
- reflected the utopia of the European project, rejected an age of grimness, and affirmed modernity and freedom of expression in a troubled world;
- set an example of remobilisation for somewhat disenchanted Europeans who have been left behind by globalisation and lost their way as they search for a positive collective direction.

Exemplary in their desire to bring a European spirit alive, the people of Mons and its visitors allowed themselves to be carried away by a festive, celebratory programme of events, rather than mesmerised by the gloom and pessimism that are undermining the foundations of the European Union.

Mons 2015 offered resistance to these developments with the weapons of humour, beauty, simple hospitality, creativity, imagination and artistic expertise. Mons brought alive the utopia of the European project. Like the founding fathers' project, it was built and designed with the aim of coming together beyond cultures, ethnicities, nationalities and political ideologies to draw on the cultural and artistic resources of the territory and take an inquisitive look at other cultures from around the world and celebrate diversity. The year brought together individuals, communities, businesspeople, artists and technicians in a joyous melting pot that was poetical, warm and sincere. Mons 2015 put people at the heart of the development project.

¹¹ A new development project, Mons 2025, is under preparation in order to set the objectives for the economic and social development of the city over the next ten years.

APPENDIX: A TOOLKIT FOR MEASURING THE SUSTAINABILITY OF MONS 2015

1. Introduction

Given the scale of the resources allocated to the European Capital of Culture (ECoC) projects, ensuring and measuring the sustainability of these projects' impact is one of the challenges that all ECoCs face.

For the city of Mons, we offer a toolkit to integrate the post-2015 strategy (on which the city is working right now, in particular the Mons 2025 urban project) with the aim of helping the city's leaders to measure the sustainability of Mons 2015.

The measures whose perpetuation needs to be ensured can be summarised as follows:

- Reinforcing the city's image and economic attractiveness - sub-objectives:
 - o Increasing the number of investments, entrepreneurs and creative talents
 - o Creating jobs
 - o Developing sustainable institutional (economic) partnerships
- Developing a destination city (tourism) - sub-objectives:
 - o Increasing the number of tourists, especially cultural tourists
 - o Increasing the number of overnight stays in Mons
 - o Developing bold and contemporary cultural projects
 - o Increasing public attendance of cultural events
 - o Developing sustainable institutional (cultural) partnerships
- Economic growth through the CCIs - sub-objectives:
 - o Developing sustainable cultural infrastructure
 - o Developing bold and contemporary cultural projects
 - o Harnessing local creativity
 - o Creating jobs
- Improving local people's quality of life - sub-objectives:
 - o Redeveloping the urban area
 - o Reducing crime and the fear of crime
 - o Improving the population's sense of well-being
 - o Increasing travel by young people

This toolkit consists of two complementary parts:

- A list of indicators developed in light of the outcomes achieved, in order to measure the extent to which these outcomes are perpetuated in the long term and contribute to the achievement of the objectives set from the start;
- Guidelines on the development of the proposed indicators in order to measure the sustainability of the effects of Mons 2015 over time.

The indicators to monitor can be very numerous, generating assessment costs that are far too great. We have therefore limited the list of proposed indicators on the basis of a number of principles:

- **Specificity**, with indicators that relate to the specific outcomes of Mons 2015;
- **Relevance**, with indicators to monitor the achievement of the city's main socio-economic development objectives;
- **Feasibility**, in terms of the ease of obtaining the data.

2. The toolkit

2.1. Indicators

To assess the sustainability of the outcomes of Mons 2015 over time, the following indicators are proposed:

Objective	Indicator	Geographical scope¹²
1. Reinforcing the city's image and economic attractiveness	1.1. Number and value of private investments in the city (shops, hotels, research centres, etc.)	Greater Mons
	1.2. Number of people employed	Greater Mons
	1.3. Unemployment rate	Greater Mons
	1.4. Number and types of partnerships/collaborations* perpetuated with economic actors, for example: <ul style="list-style-type: none"> o Private companies (e.g. the companies of the Mons 2015 Club) o Development agencies (e.g. AWEX and the B2B forum Cultur@lia) o etc. *Any sort of partnerships/collaboration is eligible: sponsorship, communication support, etc.	
2. Development of a destination city (tourism)	2.1. Number of tourist arrivals and change on previous year	Municipality of Mons
	2.2. Number of overnight stays and change on previous year	Municipality of Mons
Objective	2.3. Average occupancy rate of hotels and equated structures and change on previous year	Municipality of Mons + main structures outside Mons

¹² The most relevant geographical scope is proposed, given the geographical scope of data already available (e.g. employment data) and the resources needed to collect new data (generally, as resources are limited, we propose to confine ourselves for most indicators to the Municipality of Mons where most cultural and tourist facilities are concentrated).

	<p>2.4. Number of people to have visited the Tourist Office VisitMons (or booked guided tours) and their geographical origin:</p> <ul style="list-style-type: none"> o Belgium (including Wallonia, Brussels, Flanders) o Germany o France o UK o Italy o Netherlands o Luxembourg o USA o Others 	Municipality of Mons
	2.5. Prestigious exhibitions taking place in Mons	Municipality of Mons
	<p>2.6. Number of participants at cultural events held in Mons, and at least:</p> <ul style="list-style-type: none"> o Number of tickets sold/entries to the main cultural institutions of the city (Museum Cluster, BAM, Mundaneum, Théâtre Le Manège, etc.) o Number of admissions to annual cultural events (FIFA, Transnumériques, City Sonice etc.) o Number of tickets sold/entries during special initiatives (e.g. for prestigious exhibitions, the Biennale post-Mons 2015) 	Municipality of Mons
	<p>2.7. Number and types of partnerships/collaborations * perpetuated with 'cultural' partners, e.g.:</p> <ul style="list-style-type: none"> o Neighbouring cities/ cultural institutions o Cross-border cities/ cultural institutions o Cities/cultural institutions in Europe /outside Europe <p>*Any sort of partnerships/collaboration is eligible: co-productions, sponsorship, communication support, etc.</p>	
3. Economic growth through the CCI's	3.1. Operational budget earmarked for the new cultural facilities or those rehabilitated in Mons 2015	Municipality of Mons
	3.2. Number of jobs (made permanent) at the Mons 2015 Foundation	Municipality of Mons
	3.3. Number of jobs (made permanent) at the Tourism Office VisitMons	Municipality of Mons
	3.4. Number of jobs (made permanent) in the Museum Cluster	Municipality of Mons
	3.5. Number of jobs made permanent/created in the city to prepare and implement the post-2015 strategy	Municipality of Mons

	3.6. Number of entrepreneurs active in the cultural and creative industries (CCIs)	Greater Mons
	3.7. Number of people working in the cultural and creative industries (CCIs) (employed and self-employed)	Greater Mons
4. Improving local people's quality of life	4.1. Number and value (in euros) of urban redevelopment projects (city centre and suburbs) and source(s) of funding	Greater Mons
	4.2. New or rehabilitated spaces in 2015 for activities of cultural, artistic or social interest, which are perpetuated, including: <ul style="list-style-type: none"> o Café Europa o Garden of the Maison Losseau o Hanging Garden 	Municipality of Mons
	4.3. Number of young people attending cultural events (<12 years, free admission)	Municipality of Mons
	4.4. Number of perpetuated initiatives and projects involving residents and/or artists who are local (city of Mons, Greater Mons) or regional (Hainaut, Wallonia) + number of participants, e.g. <ul style="list-style-type: none"> o Grand Eight o Grand Ouest 	Defined area
	4.5. Reduction of crime and increase in perceived safety, measurable via police crime statistics ¹³	Greater Mons

4.6. Guidelines

The city of Mons, as the entity in charge of implementing the post-2015 strategy, will also be responsible for implementing the measures needed to assess the sustainability of Mons 2015.

A series of guidelines is proposed in this regard:

1. Preparing for data collection

Preparing for data collection requires the implementation of the following steps :

- Assessing the sources available (or to be acquired) for the collection, analysis, dissemination and use of the data
- Identification of the data to be collected in light of the proposed indicators
- Examination of data sources available, including (among those already identified as part of the assessment of Mons 2015):
 - o VisitMons Tourist Office (including for Mundaneum data)
 - o Museum Cluster ticket sales
 - o Théâtre Le Manège ticket sales
 - o BAM ticket sales
 - o City of Mons

¹³ <http://www.cadastre.be/Belgique/Sécurité>

- o Mons 2015 Foundation
 - o ONSS, INASTI
 - o BelFirst
 - o BelStat
 - o Hotels and equated structures
- Definition of collection tools to be introduced to facilitate the collection of data from the different sources
 - Identification of local actors to be involved to ensure that the existing data can be accessed, i.e. all actors and organisations in possession of the data to be collected
 - Definition of the implementation timetable, for which we suggest:
 - o Collection activities every two years from 2017 to 2025 (2017, 2019, 2021, 2023, 2025), in order to ensure regular monitoring within the limits of available resources;
 - o Analysis, communication and use of data in 2018, 2020, 2022, 2024 and 2026, in order to understand on an ongoing basis whether changes need to be made to the strategy.
2. Collection and analysis of data

The collection and analysis of data require the implementation of the following steps :

- Collecting the data identified in collaboration with the identified local actors;
- Regular measurement of the indicators over time, according to the established timetable;
- Analysing the indicators in light of the city's socio-economic development objectives.

3. Communicating and making use of the results

The phase of communicating and making use of the results requires the implementation of the following steps :

- Making the results available so that all local stakeholders can assess the relevance of the Mons 2015 project for the city in the long term;
- On the basis of the results obtained, assessing the need for changes in the strategy and the post-2015 measures to improve the sustainability of the results of Mons 2015.