LDA004 - Research 13/6/03 9:50 am Page 1

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The economic impact of the Notting Hill carnival

MAYOR OF LONDON

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LONDON DEVELOPMENT AGENCY

The economic impact of the Notting Hill carnival

(INSIDE BACK COVER)

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Gujarati
જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

Greek
Αν θα θέλατε ένα αντίγραφο του παρόντος εγγράφου στη γλώσσα σας, παρακαλώ να τηλεφωνήσετε στον αριθμό ή να επικοινωνήσετε στην παρακάτω διεύθυνση.

Punjabi
ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

Vietnamese
Nếu bạn muốn bản sao của tài liệu này bằng ngôn ngữ của bạn, hãy gọi điện theo số hoặc liên lạc với địa chỉ dưới đây.

Turkish
Bu brosürü Türkçe olarak edinmek için lütfen asagidaki numaraya telefon edin ya da adrese basvurun.

Hindi
यदि आप इस दस्तावेज़ की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नम्बर पर फोन करें अथवा दिये गये पता पर सम्पर्क करें।

Bengali
আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন্ নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Chinese
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Arabic
إذا أردت نسخة من هذه الوثيقة بلغتك، الرجاء الاتصال برقم الهاتف او الكتابة الى العنوان أدناه:

Urdu
اگر آپ اِس دستاویز کی نقل اپنی زبان میں چاہتے ہیں، تو براہِ کرم نیچے دیئے گئے نمبر پر فون کریں یا دیئے گئے پتہ پر رابطہ قائم کریں.

FOREWORD

FROM MICHAEL WARD, CHIEF EXECUTIVE LDA

The Notting Hill Carnival is widely acknowledged as Europe's largest street festival and is a key signifier of London's World City status, ranking among the largest and most spectacular of world festivals, alongside New Orleans' Mardi Gras and the Toronto International Carnival. It also plays a key role in enhancing London' international tourism offer and image as a vibrant, cosmopolitan and culturally diverse city.

But it is not often recognised that the Carnival also makes a significant contribution to London's economy. In commissioning this study, the London Development Agency was interested in quantifying the economic value of the Carnival and in exploring the potential of the Carnival to generate new jobs and other economic opportunities, particularly within London's BME communities, and for transferring Carnival-related skills to other sectors of the economy. We also wished to find out how those businesses already associated with Carnival might be enabled to move to a position of greater sustainability.

What we discovered is that the Carnival is dependant on highly resourceful Carnival practitioners who provide the Carnival's vital 'creative content' and the good will of many thousands of individuals across London's communities providing skills, labour and resources to make the Carnival a reality. It is also an important cultural event for London, enjoyed by Londoners and visitors across ethnicity, age and socio-economic background, alike.

The report shows that that with careful and sensitive support and targeted interventions, it is capable of generating even greater benefits for London and Londoners and makes a valuable contribution in highlighting the economic and social importance of the Carnival. We intend to use this report to inform key interventions that the LDA will make in partnership with other stakeholders across London, as part of our forthcoming action plans in support of creative industries and BME business development.

Disclaimer
This report was commissioned by the London Development Agency in June 2002 and undertaken by a partnership of Mann Weaver Drew and De Montfort University. The views expressed in this report are those of the consultants and do not necessarily represent those of the London Development Agency. Whilst every effort has been made to ensure that the contents of the report are accurate, the London Development Agency does not accept responsibility for any inaccuracies in the data.

Acknowledgements
Whilst the Mann Weaver Drew/De Montfort University partnership were officially commissioned to complete this study, both parties wish to formally acknowledge the massive contribution of CSR Partnership, and specifically Chris Khamis and Ros Grimes.

From Mann Weaver Drew
- Fitzroy Andrew – Director, Leadership Development
- Alison Hyllam – Project Co-ordinator
- David Weaver – Managing Director

From De Montfort University
- Dr Franco Bianchini – Reader in Cultural Planning and Policy
- Abigail Gilmore – Lecturer
- Professor Richard Tomlins – Professor of Race, Diversity and Housing

From CSR Partnership
- Chris Khamis – Director
- Ros Grimes – Director, CSR Survey Limited

Independents
- Dr Tom Fleming – CIDA, London
- Jacquie Moses

The LDA project sponsor was Luna Frank Riley and the project was managed by Michelle Reeves, Strategy Development Advisor.

CONTENTS

EXECUTIVE SUMMARY

FROM MICHAEL WARD, CHIEF EXECUTIVE LDA

Introduction

In June 2002, the London Development Agency (LDA) commissioned a review of the economic contribution of the Notting Hill Carnival to the local and regional economy. The review was aimed at understanding the economic value of the Carnival and other associated activities; the potential for forward linkages, such as transfer of the skills within the London economy and possibilities for enabling businesses involved in the Carnival to move from a seasonal trading base towards long-term sustainability; key infrastructure and operational processes needed to improve the broad management capacity of the Carnival; and development of a distinctive Notting Hill Carnival brand.

The methodology, which is detailed in Appendix 1, included: a literature review; a survey of 944 visitors to the Carnival; a telephone survey of 65 "fixed" businesses in and around the Carnival area; a postal survey of licensed traders at Carnival; discussions with a number of stakeholders in the Carnival event; in-depth semi-structured interviews with 12 groups that participated in the Carnival as performers; identifying best practice models from selected comparable international festivals; and an exploration of the idea of the Carnival brand, with particular reference to media representations.

Visitors

The results of the Visitors' Survey suggest that spend over the three days by Carnival attendees was over £45 million. This figure is calculated from estimates of the average spend per person on each day, the percentage of attendees who came from various locations, and police estimates of the number of attendees at the Carnival in 2001 (estimated at 1.16 million over the three days).

The Survey asked people to estimate their spend across a variety of categories including food from stores, food in restaurants, alcoholic/non-alcoholic drink, travel, clothing, music products and other. The average spend per person was highest at the Saturday Pan-orama event (£58.00) reflecting a high level of spending on clothing and music products. The average spending on Sunday was £34.00 per head and on Monday £30.00 per head, reflecting a lower purchase of clothing and music products than on Saturday but a much higher spending on food and drink.

However, many people said that they expected to spend nothing at all during their visit other than on travel, food from stalls and drinks. For example, 92% of people said that they did not expect to buy clothes; 90% of people said that they did not expect to buy music products; 83% of people said that they did not expect to buy food in a restaurant.

The Visitors' Survey suggested that the Notting Hill Carnival did influence the spending patterns of attendees throughout the rest of the year. 52% said that they were likely to buy more Caribbean food items and products that were launched at the Carnival after coming to it. Of the people who said they would be likely to buy more Caribbean food items or products, 29% were White British/Irish suggesting that Notting Hill Carnival is a means of promoting Caribbean products to wider markets.

Of those interviewed, almost 10% lived in Kensington and Chelsea, 12% came from elsewhere in West London (three quarters of those who live in West London said that they stayed in London that weekend because they intended to attend the Carnival), 43% from other London boroughs, 10% from South East England, 15% from elsewhere in the country and 8% from abroad (including 5% from Europe). The results suggest that 90,000 of the attendees were visitors from abroad; and 316,000 were visitors from the UK but outside London.

Of the people who said that they were staying away from home during their visit, 71% said that they had planned their trip so that they could attend the Carnival.

Only 22% of respondents who lived outside West London said that they were staying away from home during their visit to Notting Hill, but most of these were staying with relatives or friends – 40% said they were not paying for accommodation. Those who did stay paid an average of £55.00 per person per night.

Three quarters of Survey respondents said that they rated the organisation of the Carnival this year as 'good' or 'very good'.

Similarly, over 80% rated the atmosphere as 'good' or 'very good'. Few respondents rated the sound systems and costumes 'poor' or 'very poor'.

When asked whether there was anything about the Carnival that they disliked during their visit, 49% said No, there was nothing that they disliked. All this amounts to a substantial vote of confidence in the Carnival this year.

The Notting Hill Carnival had no official sponsor this year, but when people were asked: 'Do you know who is sponsoring the Carnival this year'? 7.7% replied 'yes'. When these people were asked to name the sponsor, 42.5% of them said Western Union. This is interesting because Western Union was a sponsor in previous years and is clearly still associated with the Carnival in the mind of some members of the public.

- Of those interviewed, 54% were male and 46% were female. 120 were interviewed on Saturday, 380 on Sunday and 444 on Monday. In terms of ethnicity, 30% were White British/Irish, 15% were other White, 43% were Black African/African-Caribbean etc., 7% were Asian and 5% were in the "other" category. The majority of the Carnival-goers were young with almost one third under 25 years old and over one third aged between 25 and 34 years.

Businesses and Traders

Fixed businesses

Of the 65 "fixed" businesses that were surveyed, 23 were closed over the Sunday and Monday period, over half of which would normally have been open. Whilst there was therefore a loss in business for some businesses that had to close, this was not as large as might have been expected and it was probably outweighed overall by the increase in business for those traders around the Carnival area that stayed open. In addition, one third of food retailers and newsagents who were closed over the Carnival period felt that their sales had increased in the four weeks before the Carnival.

Of the 42 businesses surveyed that were open, the majority were restaurants, cafés or pubs (58%). Others were retail – food/newsagent (15%), retail/off licence (12%) and retail/other (15%).

Virtually all the businesses that were open over the Carnival weekend felt that their sales were higher than a normal Saturday to Monday period (98%), with over a quarter believing their sales to have been more than 50% higher (5% saying more than double).

Almost a fifth of businesses (19%) felt sales were higher than a normal Saturday to Monday period in the four weeks before Carnival, rising to a quarter for food outlets. However, a lower proportion (14%) of businesses felt sales were higher in the four weeks after Carnival.

The vast majority of businesses (79%) had no suggestions to offer on how the organisation of the Carnival could be improved. The remainder produced a mixture of suggestions including moving out of the area (5%), more security along the route (5%), prevent illegal traders (2%) and advertising the Carnival more (2%).

Traders
All but one of the traders who responded attended on both Sunday and Monday. In terms of the products sold, 70% sold Caribbean food, 45% sold other food, 70% sold drinks, 3% sold clothing and a further 3% music products. Almost all traders were based in or very close to London. 59% only set up stalls for Notting Hill Carnival, 30% had a business that involved establishing stalls at festivals or carnivals and 28% had a fixed business location elsewhere but occasionally set up stalls.

Over 40% of the traders that responded were of Black African/Caribbean origin, 22% of Black African/other Black origin, 15% British and 5% Asian.

Around 80% of respondents had traded at last year's Notting Hill Carnival. Traders were more likely than fixed businesses to feel that the number of customers and their sales and profits were lower in 2002 than in 2001.

The vast majority of traders (85%) said their licence application had been dealt with efficiently.

The traders were more forthcoming than businesses with suggestions on how to improve the organisation of Carnival, with 73% offering suggestions. One quarter felt that the size of the pitch was small and overcrowded, 13% called for improvements in electricity and water supplies, 10% asked for reduced fees for stores and 8% suggested better rubbish collection/more bins. They were also impassioned pleas for better toilet facilities.

Stakeholders
Discussions with stakeholders provided a great deal of anecdotal evidence on the organisation and costs of the Carnival but a dearth of detailed costings. The Metropolitan Police Service estimates that they spend £6 million on training, policing and enforcement for the Carnival. The Councils described the areas on which they spend money, including cleansing contracts, special events, planning teams, temporary toilets, hoardings and security around housing areas, public information, free parking and making temporary traffic orders. However they were not able to provide a total cost figure, which needs a far more detailed look at their accounts. Although Kensington and Chelsea estimate they spend around £500,000, they are providing the essential infrastructure for the event to take place.

Grants to Carnival groups and those organising the Carnival come from a variety of sources. From those we interviewed, our estimate is that over £1 million was provided in direct grants. Although these cannot be treated as a direct economic gain from the Carnival, they do produce a multiplier effect and give an indication of the level of activity that is generated by the holding of the Carnival.

Creatives
To obtain a view of the impact of Carnival on forward linkages in the creative sector, detailed discussions were held with 12 Carnival groups. In their view Carnival is dependent upon a range of fragmented, hard-to-reach public sector funds and Carnival practitioners need training in fund-raising and project management to enable them to identify and make best use of these opportunities. They would like to see a more unified, Carnival-specific funding policy to ease access to funds, make funding more relevant and reduce the administrative and monitoring burden. Carnival practitioners have not explored the potential of private sector sponsorship as a means to raise revenue.

Carnival is absolutely dependent upon the good will of many thousands of individuals providing their skills and labour (plus other resources) in-kind. There is an increasing realisation that the skills and resources currently offered in-kind have a market value.

The economic impact of the creative production of Carnival is sporadic, inconsistent, under-developed and often unrealised. However, if it were not for the creative production elements of Carnival, there would be no event to 'sell'.

There are many, often local, creative/economic supply chains operating in and connected to Carnival. These include the benefit the event brings to local retail sector, often to the Asian-led fabric sector. The localisation of creative practice – for example, through mas camps – ensures that the economic and socio-cultural impact of the event is felt in relatively distant London suburbs. This in turn widens the 'draw' of Carnival, establishing a sense of ownership for the event well beyond Notting Hill.

The wider impact of Carnival takes place through an associated 'Carnival industry' of 'teaching Carnival', showcasing Carnival (for example, by performing steel pan across the world) or applying Carnival skills (such as through theatre costume design). Carnival operates as a 'breeding ground' for creative industries skills development, providing individuals with creative opportunities that might not otherwise have been considered. Many creative industries skills developed through carnival have a commercial application in the creative industries sector. Practitioners who have developed their skills through Carnival can therefore help to increase the diversity of the creative industries sector, which on the whole does not currently reflect London's diverse communities. Moreover, creative practitioners who normally operate 'outside Carnival' can improve their skills-sets and profile by contributing to the production of Carnival.

However, the links between creative skills developed at Carnival and their commercial application is under-developed, requiring intermediary support to signpost opportunities to individuals, and targeted training initiatives to establish navigable career paths for Carnivalists. A focus on creative industries skills development would help to reduce Carnival's reliance on the in-kind economy and secure a means to pay for skills currently provided for free (such as through regeneration-focused skills development programmes).Overall, Carnival requires a unified approach to economic development (including a coherent and more substantial approach to public investment) that is sensitively inclusive of its social and cultural dynamics and thus appreciative of the importance of 'ownership' resting with the Carnivalists.

Overall Economic Impact
The estimate of average spend per person from our Visitors' Survey, together with estimates of the number of attendees, suggest that over the weekend Carnival attendees spent £36 million, including travel. They spent a further £9 million on accommodation. In addition, spend on the infrastructure of the Carnival and grants given to the Carnival Trust and groups involved in the Carnival would have been at least £2 million.

To these 'direct' economic impacts, we need to add 'indirect' and 'induced' economic impacts. 'Indirect' impacts result from businesses spending some of the income they receive on goods and services from their suppliers, who in turn spend their income on their suppliers. 'Induced' impacts arise from the employees of businesses, traders, Carnival groups and so on spending some of their income on goods and services from other businesses. These 'multiplier' effects are traditionally added to the original expenditure to estimate economic impact. Calculating the multiplier to use is not straightforward, but we have used those derived for the 2002 British Arts Festivals Association (BAFA) report, based on the close linkages businesses involved in the Carnival have with the London economy. **This produces an estimate of the overall income impact of the Notting Hill Carnival in 2002 of £93 million**. This dwarfs the estimate costs of the Carnival of £6-10 million.

Translating this into jobs, again using the BAFA estimates, suggests that **the Notting Hill Carnival supports up to 3,000 full-time equivalent jobs per year**. As many of the jobs will be part-time, the Carnival provides some kind of employment for larger numbers than this.

Difficulties on obtaining accurate data mean that these figures are a 'best guess'. But we have been cautious in our estimates and these figures do not take into account the increases in spending in shops before (and to a lesser extent, after) the Carnival weekend.

These estimates also do not take into account the less tangible economic benefits of the Notting Hill Carnival on the regional and national economy. These include its importance for London's image as a tourist destination and as a cosmopolitan place in which to live; the boosts to 'Carnival' and other products provided by the event; the opportunities for business and skills development in creative and other industries; and the social cohesion benefits.

Improving Carnival

There are a number of areas in which the research suggests the economic and social impact of Carnival could be improved. These include:

1) Better leverage and co-ordination of public investment, including improved marketing of the Carnival as part of London's 'offering' to both residents and visitors.

2) More effective leverage of private investment and sponsorship, better marketing and improved provision of accommodation and other tourism services.

3) Building to a much greater extent on the skills and business development potential of Carnival.

4) Balancing spontaneity with better management of the Carnival brand, which would allow a greater amount of income to be drawn into the communities involved in the Carnival and help position the Carnival as a central symbol for London and Britain.

These goals could be achieved through the establishment of a solid partnership involving key actors from the public, private and non-profit sectors. The form of incorporation of such a partnership would be determined by how best to represent the range of appropriate interests.

Such a partnership could develop and oversee the implementation of a range of specific strategies for the future of Carnival that would address some of the issues raised by this research, including:

5) A robust **public awareness, PR, media, communication and advocacy** programme, with specific campaigns aimed at London, the South East, Britain, Europe and beyond (e.g., the Caribbean, North America and Japan). This programme of action might, for example, include the development of a strategy to present this report to the media, and a media relations programme aimed at ensuring that Carnival is not a cheap story, but is presented fairly, in all its complexity. The research suggests that particular attention should be paid to communicating fully the aesthetic/artistic excellence of the event, as well as its social and economic impacts.

6) A **fundraising** strategy, aimed at maximising revenue, capital and project funding from public sector sources, as well as private sector sponsorship, income from trusts and foundations, and from relevant public, private and non-profit sector organisations from abroad. The research highlights in particular the need for a regular calendar of fundraising events. Perhaps a group of "Carnival Champions", "Carnival Ambassadors" or "Friends of the Carnival" could even be considered. These would comprise influential figures from various walks of life, including politics, business and the arts, and they would help broker public and private financial support for Carnival. Better co-ordination between different Carnival funders should also be encouraged.

7) A **branding, marketing and merchandising** strategy aimed at improving marketing of the Carnival as part of London's offering to both residents and visitors. This could be produced by the Carnival Partnership. Advice could also be sought from experts also on the intellectual property aspects of the Carnival brand and how best to exploit them. For example, learning from similar events, the merchandising strategy could include the production and distribution of T-shirts, books on the history of the event, mugs, crafts objects, CDs and other goods. The feasibility of distributing Carnival products more extensively in mainstream retail outlets in London and elsewhere could be explored. The creation of a clearer and appropriately marketed Carnival brand would help drive both the adoption of more rigorous systems of quality control and the setting of standards for other aspects of the Carnival, such as the food and drinks stalls.

8) A mechanism for the **execution** of such a marketing strategy. The know-how required to develop and exploit the commercial opportunities available to Carnival is, in our view, quite different from the know-how required to stage the artistic production that is the essence of Carnival. Whether these two different kinds of knowledge can effectively be housed within the same organisation is a vital question, as it is clear that a high level of synergy between the two will be necessary in order to extract maximum value.

9) An imaginative **programming** strategy, which would link Carnival with a calendar of events in other parts of London and Britain, including exhibitions, performances, conferences, debates, markets and trade fairs, (which could act also as vehicles for the distribution of Carnival products), perhaps on a thematic basis, with themes changing each year. These activities could be programmed in collaboration with other Carnival cities in Europe and beyond.

10) A **training and skills/business development** strategy, which would review existing forms of business support and strengthen Carnival's links with the creative industries. This strategy would involve identifying and addressing the strengths, weaknesses and needs of small businesses and other organisations linked with Carnival, in areas including management, marketing, legal and tax issues, intellectual property, health and safety and access to technology and finance. The aim would be to encourage the formation of new businesses and consolidate the existing ones.

11) A strategy to encourage a more systematic presence of carnival in the activities of **schools** in London and elsewhere, and in the **outreach and education** activities of relevant arts, media and sports organisations, businesses in all fields and youth agencies.

12) Lastly, the possibility of establishing a **Carnival Visitor Centre** should be considered, also by examining relevant experiences in the UK and abroad.

The use of appropriate **public consultation and participatory visioning processes** would be essential to confer credibility and legitimacy to all these strategies.

Further research would also be required to underpin the formulation and implementation of the strategic actions we have recommended. Carnival should be included as a key element of future studies on tourism and on the creative industries in London. The following issues, in particular, deserve further investigation and analysis:

- A more in depth study of events comparable to the Carnival, and of the lessons, which can be drawn from them.
- Research on networks and collaborative relationships between Carnival groups, and on creative supply chains.
- Research on the social impact of the event, centred on variables including communication skills, community identity and pride, organisational capacity, social cohesion, intercultural understanding, developing self confidence and reducing social isolation.

INTRODUCTION

1.1 This report

The Notting Hill Carnival is widely perceived as the largest event of its kind in Europe; and one of the largest in the world. It combines a public display of creativity, energy and art with the operational, logistical and safety challenges of a major public event.

This document is the final report of a study, commissioned by the London Development Agency (LDA), aimed at understanding the economic value of the Carnival and other associated activities; the potential for forward linkages, such as transfer of the skills within the London economy and possibilities for enabling businesses involved in the Carnival to move from a seasonal trading base towards long-term sustainability; key infrastructure and operational processes needed to improve the broad management capacity of the Carnival; and development of a distinctive Notting Hill Carnival "brand".

The methodology, which is detailed in Appendix 1, included: a literature review; a survey of 944 visitors to the Carnival; a telephone survey of 65 "fixed" businesses in and around the Carnival area; a postal survey of licensed traders at Carnival; discussions with a number of stakeholders in the Carnival event; an in-depth semi-structured interviews with 12 "Carnival groups" that participated in the Carnival as performers; and an exploration of the idea of the Carnival 'brand' with particular reference to media representations.

Despite this comprehensive mixed method approach we have not been able to conduct as full an analysis as we would have liked due to difficulties of obtaining some data on the Carnival (for example, on costs) and due to variations and gaps in other data – such as estimates of attendance – and the lack of an input-output model of the London economy.

1.2 What is Carnival?

The Notting Hill Carnival has taken place on the last weekend in August for the past 38 years. From its origins as a procession through the streets with just a few people in costume carrying steel drums, it has evolved into a truly international arts festival, with participation reflecting the diversity of nationalities and cultures resident in London. In addition to street processions and steel bands, over 40 sound systems interspersed throughout the locality have proved an additional draw. Through hundreds of street traders, Carnival offers the visitor a truly global 'culinary map', alongside arts and crafts, music, clothing, and a range of other items.

There is a direct 'line of descent' between Notting Hill and the earliest forms of Carnival originating in the Caribbean, most notably Trinidad. During the era of slavery, black people were forbidden to play musical instruments and wear costumes apart from during the period of 'Carnival' – in those times an imported European version.

When the laws maintaining slavery were repealed, the slaves took to the streets in song and dance, indulging in their own culture and using their artistic skills to mimic their masters, pouring scorn on the system that had enslaved them for so long. Slaves would dress like their masters and powder their faces or make masks representing distorted images of their former owners, as if to signify the evil inherent in those acts of possession, or as a token of ridicule.

What commenced as freedom of expression soon turned into the basis of the worldwide Carnival 'industry' recognisable today. The skills of costume making, steel drumming, and calypso became established as essential to the Carnival tradition, most notably in Trinidad, which today represents the 'home' of Carnival worldwide. Indeed, it was Trinidadians resident in Notting Hill in 1964 that were the prime movers in putting on the first of what we recognise as the modern-day Carnival. Today, it occupies a unique and established place in the nation's cultural calendar. The inclusion of Carnival in the Queen's Golden Jubilee celebrations provide an important measure of the distance travelled since 1964, and of the role the Carnival has assumed in the way in which London – and by extension, the United Kingdom – is seen around the world.

Carnival is both a major arts festival and the largest single public event staged on a regular basis in London. Even if the 13 Premier and Nationwide League football clubs in London were each playing at home on each of the three main Carnival days and each attracted capacity crowds, the numbers in attendance would still represent less than half those attending Carnival in recent years.

Of course, London is not the only city in the world hosting a major Carnival. Other, comparable examples include Caribana in Toronto; the West Indian Labour Day Parade in New York; and Mardi Gras in New Orleans.

Toronto's Caribana, which receives a CDN$353,000 grant from the city, draws an estimated one million people from Canada, the US, the Caribbean and other overseas countries and acts as a showcase for Toronto's brand as 'the world's most culturally diverse city'. Its estimated economic impact was over CDN$200 million in 2002 andCDN$180 million in 2001. Caribana has its roots in a community heritage project begun in 1967 as 'a gift from Toronto's Caribbean community to the rest of the city'.

The West Indian Labour Day Parade in New York is 35 years old. During this period it has grown from a community orientated festival to the biggest parade in New York and the largest event of its kind in the United States. The total attendance is estimated at some three and a half million people and the annual revenue at US$300 million. The Parade is now part of action to promote tourism and increase the economic impact of cultural events and tourism for the Caribbean community in New York and to exploit the celebration of Caribbean cultural heritage for the community based around Brooklyn.

Mardi Gras in New Orleans, which is always scheduled 47 days preceding Easter, began in the late eighteenth century as fairly simple masquerade balls but over the years evolved into a complex set of public masquerade balls, street processions and private parties. Most New Orleans carnival parades and balls are sponsored by structured entities known as krewes. Mardi Gras has a massive economic impact – estimated at between $840 million and $1 billion. It is extremely well-known around the world and is itself a recognised brand, with a full range of merchandise.

Unlike some of these other major events, little is known or understood about the economic contribution that the Notting Hill Carnival makes in any one year, or has made throughout its lifetime. This is important to consider in the context of recent levels of attendance at Carnival, and a consideration of its economic potential is at least as important as the understandable focus there has been in on public safety. This report represents the first systematic attempt to assess the economic contribution made by Carnival, and it is intended that a useful 'baseline' is established to guide the conduct of further areas of work. Whilst what is uncovered here is of enormous importance, it is by no means complete. The recommendations contained at the end of this report point to a number of ways in which these findings might be taken forward.

INTRODUCTION

Assessment of overall economic impact
The focus in this report has been on presenting an analysis that will draw together the available data and estimates of expenditure and costs to provide a very broad estimate of the economic impact of the Notting Hill Carnival. This will also include an employment effect, a discussion on social impact and a summary of evidence on existing forward linkages and the potential to build upon these.

The positive economic impacts include:

- Direct economic impact of spending by the Carnival company, Carnival groups etc.
- Indirect effect of spending by the Carnival company and of Carnival groups etc. on a variety of suppliers.
- The induced impact, i.e. multiplier effects of visitors' spend on businesses and Carnival groups etc. providing services at the Carnival.
- Media impact.
- The 'forward linkages' that emerge from business and product promotion opportunities and from employment/training opportunities.

Negative economic effects include:

- Costs of policing, cleaning up etc.
- Costs in terms of lost business of firms that had to close during the Carnival.
- Costs in terms of other displacement such as local people leaving the area.

LDA004 - Research 13/6/03 9:50 am Page 16

VISITORS

2.1 Introduction

This chapter paints a picture of the people who visited the Carnival – including who they were, where they came from, why they came, what they liked and disliked and how much they spent. To obtain this information we interviewed 944 individuals, of whom 53.7% were male and 46.3% were female. 120 people were interviewed on Saturday, 380 on Sunday, and 444 on Monday.

Obtaining a reliable, credible estimate of the total number of visitors to Carnival 2002 proved a significant challenge. We chose to base our estimate of 1.16 million on figures provided by the Metropolitan Police. Based on this figure and on the percentages obtained from this survey we calculate that spend over the 3 days, including on accommodation, may have topped £45 million. Some 90,000 visitors came from abroad and 316,000 were visitors from the UK but from outside London.

2.2 Who attends the Carnival and where do they come from?

Notting Hill Carnival is a regular event in the annual calendar of a wide range of people. All age groups of men and women descend on Notting Hill for the August Bank Holiday weekend, travelling from Europe as well as from towns around the United Kingdom. Whilst an event with distinct Caribbean origins, Carnival is ethnically diverse in terms of the people who visit and are involved. In particular, it attract young men and women with significant purchasing power, and given that many visitors are from towns and countries outside London, they are bringing their wealth into the city every August Bank Holiday weekend.

The overall age profile of the visitors surveyed is shown in the table below. Most visitors to Carnival (69%) were aged between 16 and 34 years.

16-24 Years	25-34 Years	35-44 Years	45+ Years	Not Known
33%	33%	18%	12%	4%

People with spending power visit the Notting Hill Carnival: the majority – 68% – of attendees were employed or self-employed. Of the remainder, 17% were students, 8% were registered unemployed, 3% were unwaged and 2.5% were retired. 14.3% of Asian visitors were unemployed and 10.1% of Black Caribbean attendees were unemployed. These proportions were higher than in the other ethnic groups: White British/Irish 8%; mixed White/Black 6%; and Black African/Black Other 4%.

People travel from all over the world to attend Carnival, but it is still very much a London event. 65% of Carnival goers came from London – 10% from Kensington and Chelsea, 12% from elsewhere in West London and 43% from other London Boroughs. Of the 35% who came from outside London, 10% came from SE England, 15% from elsewhere in the UK and 8% came from abroad, including 5% from Europe

Most people interviewed had been to Carnival before, except in the 'Other White' category, which is made up of visitors from abroad and other people from overseas who live in the UK, where 63% were first time visitors. 83% of Black Caribbean visitors and 57% of White British/Irish visitors had been to Carnival in previous years. 51% of Black Caribbean visitors said that they try to come every year, while only 20% of White British/Irish try to come annually.

Most people – 54% – travelled to Carnival by train or tube and 14% came by bus, making public transport the principal means of transport. 22% came by car, equally distributed between men and women. Similarly, men and women are equally likely to walk to Carnival. Women are more likely to use public transport than men, and young people are more likely to use public transport than older people, who are more likely to use a car.
Carnival is ethnically diverse:

TABLE / GRAPHIC TO FOLLOW

White people are still in the minority on the streets of Notting Hill over August Bank Holiday, but this is only marginally so. If the Mixed Black/White respondents are added to the Black Caribbean, Black African/Other, Asian and Other Mixed figures, it can be said that just over 50% (51.2%) of Carnival goers are from black and minority ethnic groups.

This bald statement does not, however, give a full flavour of the diversity of the event, not just in terms of the individuals involved but also in terms of their reasons for being there, their experience on the day, and their involvement in the whole process of Carnival.

2.3 What role does Carnival play in attracting visitors to Notting Hill, London and Britain?

Of the people who said that they were staying away from home during their visit to Carnival, 71% said that they had planned their trip so that they could attend. 24% decided to visit Carnival during their trip – it was unplanned. Young people and women are more likely to decide to attend during the trip. In terms of ethnicity, the majority of people in all categories planned their trip, apart from the 'Other White' category.

Of 'Other White' people, 49% planned to visit Carnival and 42% made the decision to come during their trip. A significant number of these individuals (29%) are from overseas and are first time visitors (63%), and they are more likely than any other category to pay for accommodation and to use public transport. Consequently, they will have a significant economic impact on the area during Carnival weekend and, in these terms, it is important to maximise their participation by attracting them to the event either before or during their trip. They were asked how they found out about Carnival. Their responses revealed that they were more likely than any other category to learn about Carnival from Tourist

Information although, in common with other people, they are most likely to find out about Carnival by word of mouth.

76% of respondents who actually live in West London said that they stayed in London this weekend because they intended to attend Carnival. The implication being that they might have left London to spend their weekend (and their money) elsewhere, had it not been for Carnival.

2.4 What makes people come to Carnival?

In answer to the open question, 'What made you decide to come to Carnival?' 12% of people said the music or the bands and 3% of people said the costumes and the colourful procession. Although, clearly, Carnival would not be Carnival without the procession and the costumes, the importance of the music cannot be underestimated. Visitors were asked to rate the costumes and procession and the static sound systems. The costumes and the procession were rated very highly – 31.5% said they were 'good' and 55% said they were 'very good'. The static sound systems were not rated as highly, although they still received a high score with 29% saying they were 'good' and 54% saying they were 'very good'.

People are more likely to come to Carnival for the music than the procession, yet they rate the procession higher than the sound systems, perhaps indicating the higher expectations that visitors have of the sound systems.

Given that people expect to spend more money on food and drink than anything else, these do not feature high on their reasons for attending Carnival. 3.5% said that they come for the food and 2% for the drinking and/or alcohol.

The reason most often given for coming to Carnival was simply, – 'fun'. This was said explicitly by 16% of people, but other responses could be put in the same category: enjoyment and entertainment (8%), the atmosphere (6%) it's amazing/special/different (4%). When visitors were asked to rate the atmosphere at Carnival this year 31% said it was 'good' and 57% said it was 'very good'.

14% said that they had made the journey to Carnival because they were curious and wanted to see what it was like, and another 3.5% said that they had not been to Carnival before, so presumably they also wanted to see what happened there. 2% said they were on holiday, which must have given them the opportunity to attend, and a further 3% said that the Carnival had a good reputation and/or had been recommended. Almost a quarter, therefore, were first time visitors, illustrating how important it is to make Carnival an attractive event that first-time visitors want to try out.

On the other hand, 8% said they came because they had been before or they come every year. Black visitors are more likely to say this than any other ethnic group. A further 5% said that they came because they had enjoyed other years.

13% of people said that they decided to come to Carnival because they were with friends or meeting friends. An additional 4% said that they come to see or meet girls/women/men, while 3.3% said that they came because of 'the people'.

2.5 What do visitors particularly like about Carnival?

There is no one 'killer' feature of the Carnival. Different people attend for different reasons. Carnival is an event that has something for everyone. For example, men show a preference for the musical aspects of the event, whereas women indicate a specific interest in the costume and design elements.

For most ethnic groups the activities that make up the Carnival – bands, sound systems, costumes, floats – are the things that they like most. All, except the White British/Irish category, mention these things more than anything else. For the White British/Irish category the most important things are related to the atmosphere and enjoyment of Carnival.

In terms of the activities, people like the music (bands and sound systems) more than anything else – 39% overall. This is particularly the case for Black Caribbean and Mixed White/Black visitors – 47% of Mixed White/Black respondents and 45% of Black Caribbean respondents said they liked the music.

When 'sound systems' are viewed separately the ethnic group that is most keen on them is 'Mixed White/Black'. This group said that they liked the sound systems twice as often as any other group.

The procession (costumes and floats) are also very popular – it is mentioned by 13% across the board – but they seem to be particularly liked by the Other White category 17% of whom referred to the procession. This is almost equalled by the Black African category at 16.5%.

The Mixed White/Black visitors are also more keen on some of the 'fun' aspects of Carnival than other visitors, in particular the dancing which was mentioned by 11% of people in this category, compared to the average of 6.5%. They also liked the food and drink at the Carnival more than other groups. This is mentioned by 8% of Mixed White/Black people in comparison to 5% over all.

Turning to the social aspects of Carnival, some people seemed to like the fact that there is such a crowd – 12% of all respondents said that they liked the crowd and the numbers of people at the event. This was particularly true of the Asian (19%) and Mixed White/Black (17%) visitors, who cited it more often than Black African/Other (13%), Black Caribbean (12%), Other White (11%) and White British/Irish (11%).

The social aspects of Carnival – meeting people and seeing friends – are clearly important to visitors. These are mentioned overall 12% of the time. They are mentioned more often than that, though, by Mixed White/Black (14%), Other White (13%), Black Caribbean (12%) and Black African/Black (12%).

Carnival goers also appreciate the fact that this is a multi-cultural event, steeped in tradition. Overall, 8% of people said they liked this aspect of Carnival, but it was particularly important for the Black African/Black Other visitors, 13% of whom referred to it. 10% of Mixed White/Black visitors and 9% of the Black Caribbean visitors also mentioned it.

2.6 How do visitors think the organisation of Carnival can be improved?

Some three quarters of the respondents said the organisation of Carnival was 'good' (35%) or 'very good' (41%). Similarly, over 80% of people rated the atmosphere as 'good' (31%) or 'very good' (57%) and the negative ratings about the sound systems or the costumes were very low.

When asked whether there was anything about Carnival that they disliked during their visit to Carnival, 49% said, 'No'. This is obviously a substantial vote of confidence. The factor that was most disliked by 9.0% of people was that it was too crowded.

In terms of the environment of Carnival, 5% of people disliked the litter and lack of bins, while 3% complained about the lack of toilets/toilet paper. Factors relating to the police and police harassment were disliked by 5% of visitors. On the other hand, a number of people expressed their dislike of various possible public order issues including rude people/troublemakers/drunks (5%) and fighting/violence (4%). Personal safety issues do not, however, appear to be a major issue for Carnival goers.

2.7 Notting Hill Carnival as a marketable cultural event

In recent years Carnival has been promoted as a key cultural event in the London calendar, creating a 'brand' to which increasing numbers of consumers will be attracted. Is this notion reflected in the opinions of the visitors to Carnival?

Visitors were asked whether they thought Notting Hill Carnival was a key event in London's cultural life, and a large majority of respondents agreed that it is. This was the case in all categories of ethnicity, the over all rate being 'agree' 41% and 'agree strongly' 53%.

When asked whether they thought that Carnival is part of Britain's national identity – part of what Britain is all about – 35.5% 'agreed' and 36% 'strongly agreed'. 13% said that they disagreed with this statement, while a further 13% took the middle ground and said that they neither agreed nor disagreed. The high level of agreement suggests that people now see the Caribbean culture that is represented at Carnival as being a part of British identity.

In line with this, 90% of respondents expected people outside London to know about Carnival. A smaller proportion – 70% – expected people in other countries to know about the Notting Hill Carnival. However, only 56% of 'Other white' interviewees, made up mainly of overseas visitors, agreed or strongly agreed that people from other countries would know about Notting Hill Carnival.

2.8 Carnival Sponsors

The Notting Hill Carnival had no official sponsor this year, but when people were asked, 'Do you know who is sponsoring the Carnival this year?' 7.7% replied 'Yes'. When these people were asked to name the sponsor, 42.5% of them said Western Union. Western Union was a sponsor in previous years (though not in 2002) and is clearly still associated with the Carnival in the mind of some members of the public.

Other names given as possible sponsors were a broad cross-section of companies that were named by just one or two people.

2.9 Summary of spending patterns at Carnival

People spent £58.47 on Saturday, £33.54 on Sunday and £29.81 on Monday – an average of £34.95 a day. More money is spent on drinks (alcoholic and non-alcoholic) than any other category (£10.26 per person per day on average across the three days).

More drinks were bought on Sunday (£11.69 per person) than on Saturday (£10.55) or Monday (£8.96). More than £8.00 per person was spent on both travel and food from stalls. Restaurant eating was not so popular.

More is spent on clothing than on music products or "other" expenditure, and most of these items are bought on Saturday rather than either of the other two days. On average, people spend £9.18 on clothes on Saturday, but only £0.73p on Monday.

People who came from outside West London spent £44.00 on Saturday, £28.05 on Sunday and £26.49 on Monday – an average over the three days of £38.53 per person per day. The total spend for people who live in Kensington & Chelsea and elsewhere in West London was an average of £28.64 per person.

Question How much do you expect to spend today on:	Total Spend (all 3 days)	Saturday	Sunday	Monday
Snacks/Food from Stalls	£8258.39	£1058.40	£3257	£3942.99
Food in Restaurants	£2025.50	£654	£619	£752.50
Alcoholic/Non-Alcoholic Drinks	£9684.30	£1266.10	£4440.90	£3977.30
Travel	£7616 + 800 Euro = £8149	£2301	£2069.80 + 800 Euro = £2603	£3245.20
Clothing	£2312.10	£1101	£887	£324.10
Music Products	£1158	£275	£280	£603
Anything Else	£1413.10	£361	£659.40	£392.70
Total Overall Spend	£32467.39 +800 Euro =£33000.39	£7016.50	£12213.10 +800 Euro =£12746.10	£13237.79

2.10 Travel

The majority of visitors to Carnival have to meet travel expenses to some degree. It is therefore a significant aspect of the economic infrastructure of Carnival (see table above for expenditure figures).

22% of respondents came to Notting Hill by car, but the majority – 68% – travelled by public transport – over half (54%) by train or tube and 14% by bus.

There was a slight inconsistency in the figures for expenditure on travel, in that 68% said they travelled by train, tube or bus but only 54% said they spent money on travel costs. Perhaps this can be explained by the fact that some people will already have paid for their travel cards or their package holiday. It is also because during the Carnival weekend, some of the travel by tube is in effect free.

However, we can say that the average expenditure on travel for the people who do pay for it is £15.88 per person across the three days. Looking at it in terms of the whole sample, people who attend the Carnival spend on average £8.63 per person on transport.

2.11 Accommodation

Only 22% of respondents who live outside West London said that they were staying away from home during their visit to Notting Hill. Of these, a significant proportion were staying with relatives or friends. Of the respondents who were staying away from home, 40% were not paying for accommodation, 37% did not know how much they were paying for accommodation and 23% were paying and could say how much. The people who could tell us how much they were paying for accommodation were spending an average of £54.85 per person per night.

Only 20% of those who stayed away from home paid for accommodation in a hotel, guesthouse, B&B, campsite or hostel. Of those who stayed in a hotel or guesthouse/B&B, 73% were first time visitors, 60% were 'White Other', 50% were aged 25-34 and 80% were men.

In terms of the income that Carnival brings to the hotel sector, the first time visitors are of great importance. What do we know about them? For 34% of first time visitors, their visit to Carnival is part of a stay away from home, as compared to 15% for people who have been before. Many first time visitors are members of the 'White Other' category, visitors from abroad or overseas nationals who live in the UK, of whom 38% visit Carnival as part of a stay away from home.

2.12 Food, drink and other expenditure

The atmosphere of Carnival is enhanced by the food and drink that is on sale throughout the area, and the evidence is that most people (72%) intend to spend money on snacks and food from stalls. Similarly, 70% of visitors expect to purchase either alcoholic or non-alcoholic drinks. 17% said they would be spending in restaurants.

More money is spent on drinks than any other category (£10.26 per person per day on average across the three days). More drinks were bought on Sunday (£11.69 per person) than on Saturday (£10.55) or Monday (£8.96).

While more than £8.00 per person was spent on food from stalls, restaurant eating was less popular. Only £2.15 was spent on average per person across the three days; although on Saturday the average was £5.45, giving some indication to restaurant owners which day is likely to be their busiest.

More is spent on clothing than on music products or 'other' expenditure, and most of these items are bought on Saturday rather than either of the other two days. On average, people spend £9.18 on clothes on Saturday, but only 73p on Monday.

2.13 'Not expecting to spend'

However, many people said that they expected to spend nothing at all during their visit other than on travel, food from stalls and drinks. For example, 92% of people said that they did not expect to buy clothes; 90% of people said that they did not expect to buy music products; 83% of people said that they did not expect to buy food in a restaurant.

2.14 Does the Notting Hill Carnival influence spending patterns throughout the rest of the year?

Carnival appears to be encouraging people to buy Caribbean products in the future – when asked whether they were likely to buy more Caribbean of the food items or products that were promoted at Carnival, 52% answered 'Yes'.

Although 67% of respondents said that they sometimes bought Caribbean meals in restaurants or from take-aways, only 44% said that they prepared Caribbean food at home. As might be expected, of the people who eat Caribbean food at home, 41.5% are of Black Caribbean origin and only 18% were of White British/Irish origin. However, of the people who said they would be likely to buy more Caribbean food items or products, 29% were White British/Irish. This would suggest that Notting Hill Carnival is a means of promoting Caribbean products, particularly food products, and taking them into the mainstream market.

2.15 Particular categories of visitors

Black Participants

An analysis of the visitors' survey shows that there is a strong core of loyal and enthusiastic visitors to Carnival from Britain's Black Communities. Although it would appear that more could be done to attract greater numbers from Caribbean communities across the country, the regular visitors to Carnival are providing cultural and financial bedrock for this annual event.

Black Caribbean visitors are more likely to have been to Carnival before than any other ethnic group. 51% of Black Caribbean respondents said that they try to come every year, while 30% said that they had been to Carnival more than once before. People from the Mixed Black/White and the Black African/Black Other groups also proved to be regular Carnival goers, as the table below illustrates. They were committed to trying to attend Carnival every year to a much greater extent than the White group.

Similarly, Black visitors are more likely to attend more than one event than White visitors. 60% of Mixed Black/White respondents will attend more than one event, 52% of Black Caribbean respondents, 44% of Black African/Black Other respondents and 39% of White British/Irish respondents.

A significant factor in the involvement of Black people in Carnival seems to be the extent to which they have friends or relatives involved in the events. 23% of respondents said that they had a friend or relative involved. Of these people, 39% of them were Black Caribbean.

Of the Black Caribbean visitors to Carnival, 71% are from London, compared to 60% of White British/Irish respondents. When we look at White British/Irish visitors, 39% of them come from the South East of England/or the rest of the UK, whereas only 24% of the Black Caribbean visitors come from a UK location outside London.

White people are attracted to Carnival from around the country, but this does not seem to be the case for Black Caribbean visitors. It is difficult to make comparisons given that a large proportion of the UK's Caribbean population does live in London, but these figures do raise questions about the attraction of Notting Hill Carnival to a wider Caribbean audience.

	Percentage of White British/Irish Visitors	Percentage of Mixed Black/White Visitors	Percentage of Black Caribbean Visitors	Percentage of Black African/Black Other Visitors
Try to come to Notting Hill Carnival every year	20.2%	36.1%	50.7%	40.9%
Been to Notting Hill Carnival more than once before	30.9%	34.7%	30.4%	33.0%

39% of Black Caribbean visitors arrive in Notting Hill by car, a higher percentage than any other group. In common with most visitors who are attending Carnival as part of a trip away from home, most Black visitors planned to visit Carnival as part of their trip. Unlike other visitors, however, Black visitors tend not to pay for their accommodation.

White Overseas Visitors

The White visitors who are not British or Irish – in other words, the white overseas visitors to Carnival – would appear to spend more than other visitors and therefore have a significant economic impact on the event.

28.7% of this category said they were non-UK residents, with 23% coming from Europe. The majority of the remainder lived in London or the South East (59.5%) and could be long-term overseas visitors, perhaps from Australia, South Africa or North America.

It is possible to determine how these visitors are the high spenders. 42% of them were staying in a hotel, guesthouse or in B&B. Only 10.5% of them came to Carnival by car, the vast majority (79%) taking public transport.

Almost half of the people who were paying for their accommodation were staying in Hammersmith & Fulham, Kensington & Chelsea or Westminster. They paid on average £78.32 per person per night compared to the overall average of £54.85.

Most of these people (63%) were first time visitors to Carnival and their visit was not necessarily planned as part of their stay. 37.7% of the 'White other' category were staying away from home during Carnival. Of the people who were staying away from home, 49% had planned to go to Carnival whereas 42% had not.

Given that many of them had not planned to go, the ways in which overseas visitors and non-UK residents found out about Carnival is clearly important. Whereas only 4% overall said that they found out from Tourist Information, in the case of the 'White Other' category, 10.5% found out via Tourist Information – far higher than any other group. Similarly, 42% of this group found out by word of mouth – much higher than other ethnic groups.

Carnival organisers can therefore derive maximum benefit by ensuring that information is available in locations where overseas visitors are found – not only for those first time visitors planning to come to Carnival, but also for overseas visitors and residents who had not originally planned to include Carnival in their stay.

LDA004 - Research 13/6/03 9:50 am Page 24

LOCAL BUSINESSES AND TRADERS

3.1 Introduction

This chapter profiles the views of local businesses and street traders active during Carnival, and provides data on trading patterns and results, and indicators of spending including staffing.

Of the 65 'fixed' businesses that were surveyed, 23 were closed over the Sunday and Monday period, over half of which would normally have been open. Whilst there was therefore a loss in business for some businesses that had to close, this was not as large as might have been expected and it was probably outweighed overall by the increase in business for those traders around the Carnival area that stayed open. In addition, one third of food retailers and newsagents who were closed over the Carnival period felt that their sales had increased in the four weeks before the Carnival.

Virtually all the businesses that were open over the Carnival weekend felt that their sales were higher than a normal Saturday to Monday period (98%), with over a quarter believing their sales to have been more than 50% higher (5% saying more than double).

40% of all traders felt there were less customers than last year's Carnival – far out-weighing traders that felt there were more customers (12%). 40% of traders also thought sales were less than 2001. 10% of traders felt sales were up on 2001, all of which were traders that only set up stalls for Notting Hill Carnival.

3.2 Fixed businesses open during Carnival weekend

This section describes the views of 42 fixed businesses open during the Carnival Weekend. Virtually all of them, 41 of the 42, were open all weekend – only one business closed on Bank Holiday Monday. This was the normal pattern of opening over a Bank Holiday Weekend for 40 (95%) of these businesses.

Nature of Open Businesses

The fixed businesses open during Carnival Weekend were a mix of services and retail. 58% of businesses are food outlets, including restaurants, cafes and pubs. The remainder were retail outlets including food/groceries, newsagents and off-licences.

88% of the businesses were selling products they normally sell. The few businesses (12%) that did sell something different to their normal product were more likely to be food outlets and off-licences than retailers. Products that were sold differently due to the Carnival were largely takeaway foods and limited ranges of drinks.

Ethnic Group of respondents from local businesses

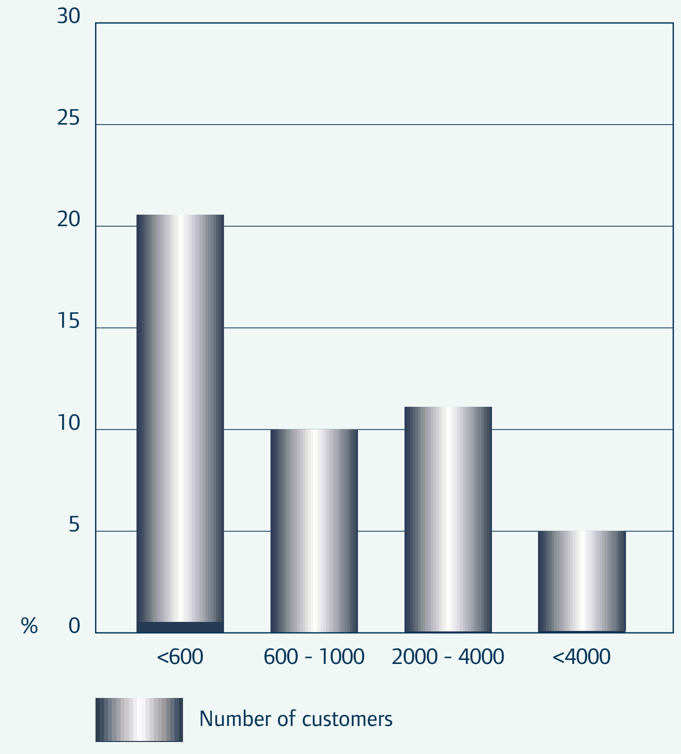
The survey asked respondents from the businesses if they would consider indicating which ethnic group they thought they belonged to. The vast majority of people answered this question, with only 2% unable to answer/refused. The findings reveal a wide mix of ethnic groups amongst local businesses. Almost a third of respondents were Pakistani (29%), 12% of people were Indian and a quarter were Mixed White and Asian – totalling nearly two-thirds of respondents (64%) of Asian/Mixed Asian ethnic group. Over a fifth of respondents (21%) were White/Other White, including 17% White British and 5% Other White. Smaller ethnic groups included respondents who were Mixed White and Black Caribbean (5%), Mixed White and Black African (5%) and Chinese (2%).

3.3 Estimated Impact of Carnival Weekend on Businesses

Businesses were asked a range of questions related to the impact of the Carnival Weekend, including estimated numbers of customers, value of sales and profit and how different these figures were to both Notting Hill Carnival in 2001 and a normal weekend period.

Number of Customers

Almost half (48%) of the businesses were unable to provide an estimate of the number of customers during Carnival Weekend, rising to three quarters (75%) of off-licences.



Those businesses that were able to provide estimates produced a wide range of figures.

26% thought there were less than 600 customers; 10% estimated 600-1000;12% estimated 2000-4000; and 5% estimated over 4000. Whilst samples become small, off-licences and retailers were more likely to estimate over 2000 customers than food outlets such as restaurants, cafes and bars.

Comparisons of customers with Carnival Weekend 2001

When businesses were asked to compare their estimate of the number of customers with 2001, 21% felt that there were fewer customers in 2002 and only around 10% felt there were more. 38% of businesses felt the number of customers was about the same, whilst 31% were unable to estimate.

These comparisons with 2001 varied significantly by type of business. Only food outlets (13%) and retail food/newsagents (11%) felt there were more customers than in 2001. Off-licences (50%) were most likely to feel there were fewer customers. The majority of 'other' retailers (80%) felt there were about the same number of customers as in 2001.

Value of Sales and Amount of Profit

Unfortunately, the vast majority of businesses (88%) were unable to provide any estimated value of sales or amount of profit over the Carnival Weekend. Of the few businesses (12%) that provided figures, sales ranged from £300 to £12,500 and profits from £100 to £5,000, but samples become too small to compare types of businesses.

Comparisons of sales and profits with Carnival Weekend 2001

In contrast, almost half (48%) of all businesses were able to compare their value of sales and profit with 2001. Food outlets (54%) and off-licences (75%) were better able to give some opinion than retail food/newsagents (33%) and other retail (20%).

Overall, only 7% of business felt their value of sales and amount of profit was more in 2002 than in 2001, though this was slightly higher for food outlets (13%). Over a fifth (21%) felt their value of sales and profit was less than in 2001 – rising to a third of retail food/newsagents. Almost a fifth (19%) felt sales and profits were the same as in 2001 – including half of off-licences. Around a fifth of businesses were therefore consistent in their view that customers, sales and profits were down on 2001.

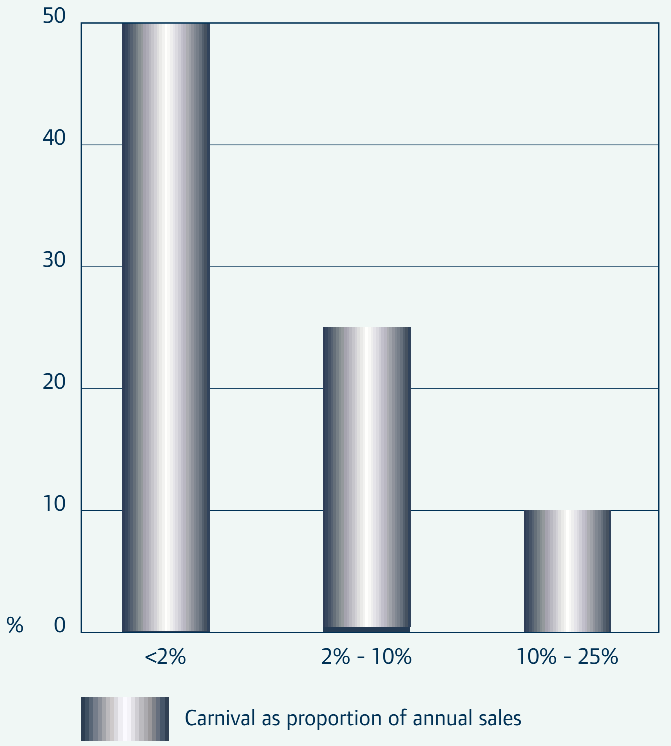
Businesses were better able to provide an opinion on customers than on sales or profits – and providing actual sales and profit figures, as we saw earlier, was particularly problematic. Data collection may improve if businesses receive some guidance or warning ahead of Carnival that information may be requested.

Comparison of sales with a normal Saturday to Monday period
When businesses were asked to estimate how much higher or lower sales were on Carnival Weekend than on a normal Saturday to Monday period they were virtually unanimous (98%) in feeling that Carnival sales were higher – in some case considerably higher. Around two thirds (66%) thought sales were up to 50% higher, including all 'other' retailers. Almost a third (31%) thought sales were more than 50% higher – including 5% who felt sales were more than double a normal weekend. Food outlets (38%) – including restaurant, cafes and bars – and off licences (50%) were more likely to state their sales were more than 50% higher.

This optimistic response endorses the economic benefits of the Notting Hill Carnival to local businesses.

Proportion of Annual Sales that Carnival Represents
The majority of businesses (83%) were able to estimate what proportion of their annual sales Carnival represents.

Half of all businesses felt the Carnival delivered less than 2% of their annual sales, higher for off-licences (75%). Around a quarter (24%) estimated the proportion to be between 2% and 10% of annual sales, higher for food outlets (29%). Around 1 in 10 businesses felt the proportion of annual sales was as high as between 10% and 25%. These figures suggest Carnival Weekend gives an important boost to the annual sales of many local businesses.



Costs to Businesses over Carnival Weekend
In order to balance the benefits of Carnival Weekend, businesses were asked to estimate any costs they incurred. This should not necessarily be viewed as negative since any costs should be seen in relation to the increased benefits. Additionally, figures for usual costs over a normal weekend are not available. However, in order to gain a full picture of the local impact, costs to employers over Carnival Weekend are required. The types of costs businesses were asked to estimate included labour; goods supplied/raw products; heat, light, fuel etc; additional security; and other costs.

Unfortunately, as was the case with the value of sales and profits, the majority of businesses were unable to provide any estimated value costs over Carnival Weekend. This was highest for estimates of additional security, as shown in the table below. Samples become too small to compare types of businesses.

	Don't Know	Less than £200	£200-£400	£400-£2000	£2000-£3000	Total
Labour	76%	2%	12%	7%	3%	100%
Goods supplied/raw products	81%	5%	5%	7%	2%	100%
Heat, light, fuel etc.	76%	12%	12%	0%	0%	100%
Additional security	90%	10%	0%	0%	0%	100%
Other costs	N/a	N/a	N/a	N/a	N/a	N/a

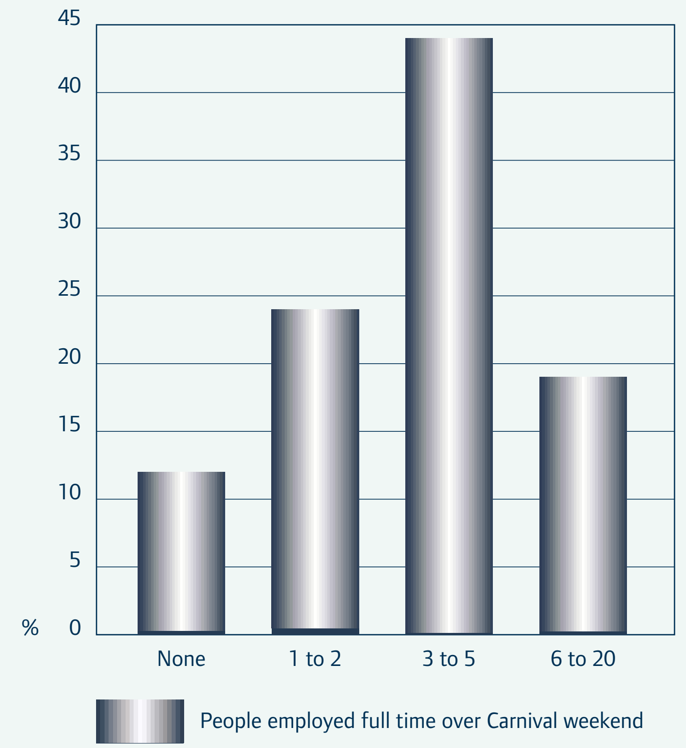
Base: All Open Businesses; Percentages
Source: Notting Hill Business Survey 2002, CSR Partnership

Businesses that were able to give some idea of costs showed the highest costs, as might be expected, were labour costs, with 10% of employers estimating between £400 and £3,000, and 14% less than £400. Only marginally less were the costs of goods supplied/raw products with 9% of employers estimating between £400 and £3,000, and 10% less than £400. Those businesses able to estimate heat, light and fuel costs (24%) stated they were less than £400, and those able to estimate additional security costs (10%) less than £200.

It is difficult to compare costs against sales and profits – not least due to the inability of businesses to provide information. The limited information provided by 12% of businesses (see earlier) suggested sales figures of between £300 and £12,500 – far exceeding costs. Further, 12% of businesses said their profits were between £100 and £5,000, suggesting any costs incurred by Carnival Weekend were offset by the benefits to businesses.

People Employed During Carnival Weekend
All businesses were able to provide information about how many people they employed over Carnival Weekend and how different this was to an ordinary weekend.

Over 1 in 10 businesses (12%) did not employ any full-time staff. Nearly a quarter of all businesses (24%) employed between 1 and 2 people full-time, highest for retail food/newsagents (44%). Almost half of all businesses (45%) employed between 3 and 5 people full-time, higher for food outlets (54%) and other retailers (60%). Nearly a fifth of businesses (19%) employed between 6 and 20 full-time staff.



Full-time and part-time staff compared to a normal weekend
In order to assess the employment impact of the Carnival Weekend, businesses were asked how different their employment patterns were to a normal weekend. Their answers reveal a significant increase in employment, with 43% employing more part-time staff than a normal weekend, slightly higher than those employing more full-time staff (33%).

Where employees of businesses live
An important consideration in any economic impact study is the extent to which local people are employed or whether the economic benefits of work are reaped elsewhere. The benefits of employing local people extend beyond the advantages of employment and the knock-on effects for employees. They also have a knock-on 'multiplier' effect in terms of local 'consumer' spending. The term 'local' can be ambiguous, and sometimes contentious. For the purposes of this study local employment is represented by the broad term 'West London'.

Businesses were asked roughly what proportion of their employees, including themselves, are from West London, the Rest of London, the Rest of the UK or Abroad. More than half of all businesses (52%) employed all of their staff from West London, higher for food outlets (58%) and off-licences (75%). Nearly three-quarters of all businesses (74%) employed more than half of their staff from West London and only 5% of businesses did not employ people from West London.

By contrast, over two-thirds of businesses (67%) did not employ people from the Rest of London – and only 14% employed more than half of their employees from the Rest of London. 83% did not employ people from the Rest of the UK – and those that did (14%) employed less than 40% of employees from the Rest of the UK.

Over three-quarters of businesses (76%) did not employ people from Abroad at all, but over a fifth (22%) employed more than 10% of their employees and 14% employed more than half of their employees from Abroad.

These figures suggest that local businesses employ a high proportion of local people, in this case people living in West London. This has implications for the economic impact of Notting Hill Carnival since the economic benefits are likely to be reaped by people living and working in West London. Only a small proportion of the economic benefits of employment are lost through 'leakages' to other areas – largely to people living in the Rest of London.

Suppliers of goods and services
Another important factor in any economic impact study is the extent to which local businesses buy their goods and services from local suppliers. In the same way that the economic benefits of employment are maximized if people are employed locally, the economic benefits through suppliers are maximized if goods and services are sought locally. Not only does this have a knock-on 'multiplier' effect in terms of local employment for local suppliers, there are further 'multiplier' effects through the consumer spending of people employed by suppliers.

This survey found that almost a quarter of all businesses source all their goods and services from suppliers in West London – rising to half of off-licences. Around half of all businesses source at least 50% of their goods and services from suppliers in West London – rising to three-quarters of off-licences. Only a third of all businesses do not receive any goods and services from West London suppliers.

Where businesses use suppliers outside West London, almost a fifth source all their goods and services from suppliers in the Rest of London – and 45% source at least half of their goods and services from this area. Just over 1 in 10 businesses source all their goods and service from suppliers in the Rest of the UK; only 14% source at least half their goods and services from the Rest of the UK. Only 2% of businesses source all of their goods and services from Abroad/Outside the UK and 91% do not receive any goods and services from suppliers outside the UK.

The findings suggest strong linkages with local suppliers in West London, implying that many of the economic benefits are felt through a local supply chain. The majority of goods and service sourced elsewhere come from the Rest of London, so overall the knock-on 'multiplier' effects through the supply chain are largely concentrated within West London and the Rest of London.

3.4 Long-term Effects on Local Businesses
The survey aimed to gain an insight into the long-term effects of the Carnival, both in the run up to Carnival Weekend and during the period after. A period of four weeks either side of the Carnival was chosen to gauge any spin-offs for local businesses during the weeks surrounding Carnival Weekend. Businesses were also asked if they could estimate by how much/what percentage sales were higher or lower than a normal Monday to Saturday period, although samples become quite small and should be used with caution.

Sales in the four weeks before Carnival
Almost a fifth of businesses (19%) felt sales were higher than a normal Monday to Saturday period in the four weeks before Carnival – rising to a quarter of food outlets. Estimates of how much higher ranged between 10% and 50%. Around two-thirds of businesses (67%) felt sales were

about the same during this period – including all off-licences. Overall, 14% of businesses felt sales were lower during this period, slightly higher for 'other retailers' (20%). Estimates of how much lower ranged between 10% and 20%.

3.4.2 Sales in the four weeks after Carnival
Businesses were less likely to state sales were higher in the four weeks after Carnival than with sales taken over a normal Saturday to Monday period – 14% compared to 19% – although a fifth of food outlets and other retail thought sales were higher in the four weeks after Carnival. Estimates of how much higher ranged between 10% and 50%.

62% of businesses thought sales in the four weeks after Carnival were about the same as sales over a normal Saturday to Monday period – including all off-licences. Almost a quarter of businesses (24%) felt sales were lower in the four weeks after Carnival – compared to only 14% who felt sales were lower in the four weeks before Carnival. Estimates of how much lower ranged between 10% and 20%.

Whilst the figures should be used with caution, the estimates provided by businesses suggest that the volume of sales for businesses saying their sales were higher – up to 50% higher – exceeded sales that were lower – no more than 20% lower. This would suggest that, on balance, actual sales figures were likely to be higher during the four weeks either side of Carnival.

3.5 Suggestions on how the organisation of Carnival could be improved
79% of businesses had no suggestions on how the organisation of the Carnival could be improved. The remaining 20% produced a mixture of suggestions, including 'move it out of the area' (5%) and 'provide more security along the route' (5%). A small proportion of businesses (2%) suggested 'go back to the other route', 'keep the crowds moving', 'give greater publicity to businesses', 'prevent illegal traders', 'advertise the Carnival more' and 'suggestions not heeded'.

The fact that the vast majority of local businesses did not make any suggestions, despite being offered the opportunity in this survey, may suggest that they are satisfied with the organisation of Notting Hill Carnival Weekend. However, it does seem that some local businesses are not entirely satisfied with the organisation of the Carnival, particularly the security. A small proportion of local businesses do not want the Carnival in the area at all, suggesting there may be scope for liaison between organisers and local businesses.

3.6 Fixed businesses closed during Carnival weekend
This section describes the views of 23 fixed businesses closed during the Carnival Weekend. The views of businesses that were closed over Carnival are important to gain an overall picture of the economic impact of Carnival to all businesses. All of these businesses were closed both on the Sunday and Bank Holiday Monday.

Nature of closed businesses
The fixed businesses that were closed over Carnival Weekend were a mix of services and retail. 40% were food outlets including restaurants and cafes, but not pubs, as all those surveyed were open over Carnival Weekend. 26% were personal services – for example hairdressers. The remainder (35%) were, like open businesses, a mix of retail outlets and off-licences – although by far the majority of off-licences surveyed were open.

Normal pattern of opening for a Bank Holiday weekend
All the closed businesses surveyed were closed on both Sunday and Bank Holiday Monday over Carnival Weekend. To identify whether this closure resulted in a real loss of income, these businesses were asked if this was their normal pattern of opening for a Bank Holiday Weekend.

Only 52% said they would normally close. In particular, 80% of personal services and other retail said they would normally close over a Bank Holiday, suggesting their trade is largely unaffected.

Although samples become quite small and should be treated with caution, all off-licences and two-thirds of food outlets and retail food/newsagents said they would normally open, suggesting these sectors are most likely to lose trade by closing over Carnival Weekend.

Businesses that would normally open – and estimate of business lost
Those businesses that would normally open during a Bank Holiday Weekend – almost half in all (48%) – were asked how the two-day closure differed from their normal pattern of opening. 73% said they would normally open both days – suggesting most of the businesses were losing two days trading. The remainder (27%) would normally open only one of the days, suggesting they would lose one day's worth of sales.

Those businesses that would normally open were asked to estimate the value of business they lose during Carnival Weekend. Unfortunately, the majority (73%) were unable to provide an estimate. Samples became very small, and only food outlets were able to provide any indication – ranging from 'minimal' to 'vast', although one food outlet estimated losing £7,000 worth of sales.

Long-term effects on local businesses closed over Carnival weekend
Fixed businesses that were closed over Carnival Weekend were asked to indicate whether their sales were higher, lower or the same in the four weeks before and after Carnival than a normal Monday to Saturday period. These responses include all closed businesses, whether normally open or closed over a Bank Holiday Weekend.

As with fixed businesses that were open, the survey aimed to gain an insight into the long-term effects of the Carnival, both in the run up to Carnival Weekend and during the period after. A period of four weeks either side of the Carnival was chosen to gauge any spin-offs for local businesses during the weeks surrounding Carnival Weekend. Businesses were also asked if they could estimate by how much/what percentage sales were higher or lower, although samples become very small and should be used with extreme caution.

Closed businesses: sales in the four weeks before Carnival
Only 9% of closed businesses felt sales were higher in the four weeks before Carnival – rising to a third of retail food/newsagents. Estimates of how much higher were around 20%. 83% of closed businesses felt sales were about the same during this period – including all off-licences. Less than one in 10 closed businesses felt sales were lower during this period – higher for food outlets (22%). Estimates of how much lower ranged between 10% and 50%.

Closed businesses: sales in the four weeks after Carnival
83% of these closed businesses felt sales were about the same as a normal Monday to Saturday period during the four weeks after Carnival – including all off-licences and retail food/newsagents. 9% felt sales were higher in the four weeks after Carnival – higher for personal services/other retail (20%). Estimates of how much higher ranged between 10% and 20%. 9% of closed businesses felt sales were lower during this period – higher for food outlets (22%). Estimates of how much lower ranged between 10% and 50%.

Overall, the sales of most closed businesses were largely unaffected by Carnival – and an equal proportion of closed businesses (9%) felt sales were both higher and lower.

The estimates provided by businesses saying their sales were lower – up to 50% lower – exceeded sales that were higher – no more than 20% higher. This might suggest that actual sales figures of closed businesses were possibly lower during the four weeks either side of Carnival. However, these small samples need to be treated with extreme caution. It is more likely that closed businesses experienced an equal mix of higher and lower sales before and after Carnival as overall responses from all closed businesses suggest.

3.7 Long-term effects on all fixed businesses open or closed over Carnival weekend

In order to gain a complete picture of the long-term effects of Carnival Weekend, it is useful to combine the answers from open and closed fixed businesses – 65 businesses in all. The answers are drawn from business perceptions of sales in the four week period either side of Carnival.

Nature of all businesses
All fixed businesses surveyed, open or closed over Carnival Weekend, were a mix of services and retail. Half were food outlets, including restaurants, cafes and pubs. 41% were a mix of retailers including food/groceries, off-licences, newsagents and other retailers. The remainder, offered personal services, such as hairdressers.

All fixed businesses (open & closed): sales in the four weeks before and after Carnival
Comparing the perceptions of open and closed businesses, businesses open during Carnival Weekend were far more likely to say that their sales were affected both before and after Carnival than closed businesses.

Well over 80% of closed businesses felt sales were the same before and after Carnival compared to only 67% of open businesses who felt sales were the same a normal Monday to Saturday period before Carnival and 62% of businesses who felt sales were the same a normal Monday to Saturday period after Carnival.

LOCAL BUSINESSES AND TRADERS

Open businesses were more likely to say their sales were higher both before and after Carnival than closed businesses. They were also more likely to say their sales were lower both before and after Carnival than closed businesses.

All business sales before and after Carnival
When all fixed businesses are looked at together, more businesses felt their sales were higher in the four week period before Carnival (15%) than in the four weeks after (12%). A similar proportion of businesses felt sales were the same in the four weeks before Carnival (72%) compared to the four weeks after (69%). And a smaller proportion of businesses felt their sales were lower before Carnival (12%) than after (19%).

Taken together, almost two-thirds all fixed businesses, open or closed, felt their sales were the same as sales over a normal Saturday to Monday period – implying Carnival had little or no effect. Those fixed businesses that did experience changes to their sales, almost a third of all businesses, were more likely to have experienced higher sales before Carnival.

3.8 Licensed traders attending Carnival weekend

In order to gain a full picture of the business activities of Carnival Weekend, a survey of licensed traders was carried out in addition to the fixed businesses.

Many of the questions were similar to the interviews with fixed businesses. Where appropriate, comparisons are made between the views of fixed businesses and those of licensed traders. A separate estimate of unlicensed traders was carried out to complete the picture of business activities around Carnival, presented separately.

Forty licensed traders responded out of a total of 250 – a response rate of 16%. This section describes the views of these 40 licensed traders that attended Carnival Weekend. The vast majority, 39 (98%) of the 40 traders attended both Sunday and Monday, and three (7%) attended on Saturday.

Characteristics of traders
Traders were asked about the type of business they undertook, including products they sold, their normal business and where they were usually based. They were also asked about their ethnic group. Throughout this section, traders' normal business as well as ethnic group is described to reveal a clearer picture of the characteristics of traders.

Products that traders sell
Traders were asked to indicate which products they were selling at Carnival. They were able to specify more than one product; and out of the 40 traders, 76 products were sold.

Around seven in 10 traders sold Caribbean Food. Of these traders nearer nine in 10 only set up stalls for Notting Hill Carnival and nearly nine in 10 were Black;

Caribbean food was more likely than Other Food to be sold by 45% of traders; of these, eight in 10 traders' normal business involved establishing stalls at festivals/carnivals/events, and over eight in 10 were White British.

Non-alcoholic Drinks were sold by seven in 10 traders, slightly higher for traders that only set up stalls for Notting Hill Carnival (74%) and Black Traders (77%). A small minority of traders sold clothing (3%) and music products (3%).

Normal business of traders
There are three types of traders:

- Traders whose normal business involves establishing stalls at festivals/ carnivals/events.
- Traders whose normal business is at another fixed location and they occasionally set up stalls at events.
- Traders who said the only time they set up stalls was for Notting Hill Carnival.

58% of traders only set up stalls for Notting Hill Carnival, and they are are more likely to be Black (66%). 28% of traders carry out their normal business at another fixed location and occasionally set up stalls at events. 13% of traders normally establish stalls at festivals/carnivals/events; and these traders are more likely to be White British (34%) than Black (12%) or Other (0%) ethnic group.

Ethnic group of traders
The survey asked traders if they would consider indicating which ethnic group they thought they belonged to. All traders answered this question.

43% were Black Caribbean, 12% were Black African and 10% Other Black. In all, 65% of traders were Black/Other Black. 20% were from Other ethnic groups – including

Other Asian (5%), Mixed White and Black Caribbean (5%), Other Mixed (3%) and Other (7%). The remaining 15% were White British.

The ethnic mix of traders is quite different to that of fixed businesses. Traders were predominantly Black Caribbean, whilst respondents of open fixed businesses were mainly Asian, in particular Pakistani.

Where traders were usually based
The vast majority, 80%, gave their base as London and the remaining 20% named towns or districts – including Brixton, Fulham, Catford, Hammersmith, Highgate, Kensington & Chelsea and St. Albans – that are all in and around London. All the traders were usually based in England.

Trading at last year's, and previous years' Carnival
Around eight in 10 traders had traded at last year's Notting Hill Carnival, including all traders that normally establish stalls. Nearly three-quarters of traders had traded in previous years, once again including all traders normally involved in establishing stalls.

Estimated Impact of Carnival Weekend on Traders
Traders, like fixed businesses, were asked a range of questions related to the impact of the Carnival Weekend including estimated numbers of customers, value of sales and profit and how different these figures were to Notting Hill Carnival in 2001.

Number of Customers
Unfortunately, 70% of traders were unable to provide an estimate of the number of customers during Carnival Weekend. Those traders able to provide estimates produced a wide range of figures. Broadly, 20% thought they had less than 300 customers; a small proportion (5%) estimated between 600-700 customers; and a similarly small proportion (5%) felt there were around 1000 customers. Estimates given by traders were therefore far less than those provided by fixed businesses, which estimated up to 4,000 customers.

Comparisons of customers with Carnival weekend 2001
40% of all traders felt there were less customers than last year's Carnival – far out-weighing traders that felt there were more customers (12%) and higher than the proportion of fixed businesses who felt there were fewer customers (21%). 60% of traders usually involved in establishing stalls felt customers were down on 2001. Overall, only 10% of traders felt customers were about the same as in 2001 – much lower than the proportion of fixed businesses (38%). 38% of traders could not provide an estimate.

Value of sales and amount of profit

Approximate Sales
More than half of all traders (55%) were unable to provide any estimated value of sales over the Carnival Weekend. This still left a sizeable 45% that could provide approximate figures – much higher than fixed businesses (12%). Sales ranged from £450 to £6,000 – less than fixed businesses, which ranged between £300 and £12,500. A quarter of all traders estimated sales to be less than £2,000, whilst 15% estimated over £2,000 rising to £6,000.

Comparisons of sales with Carnival weekend 2001
58% of traders were able to compare approximate sales with 2001, although the majority of traders normally establishing stalls (80%) could not provide a comparison. Although only 10% of traders felt sales were up on 2001, this was much higher for traders that only set up stalls for Notting Hill Carnival (17%). In fact, they were the only type of trader that felt sales were higher than 2001. 40% of traders thought sales were less than 2001. This was much higher than fixed business, where only 21% felt sales were down.

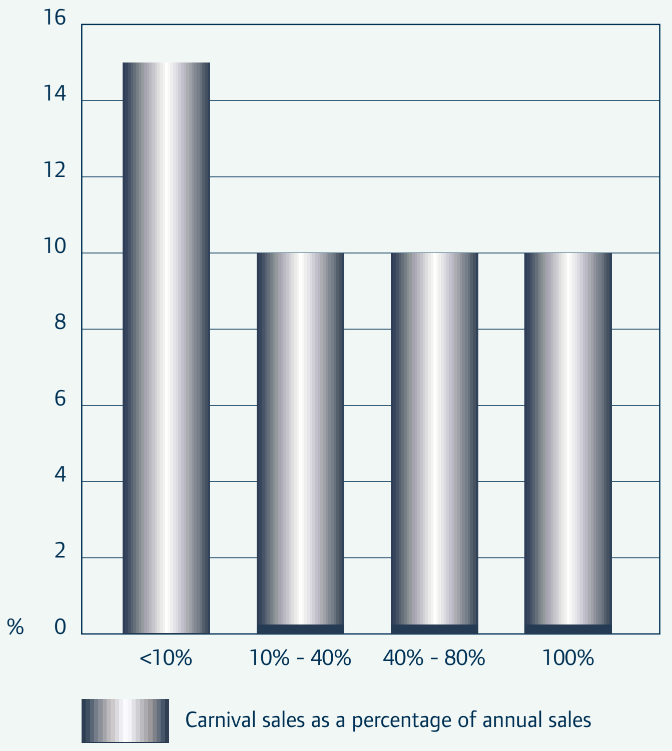
Approximate profits
In line with responses to sales, 55% of all traders were unable to provide any estimated value of profits over the Carnival Weekend, still leaving 45% that could provide figures – again much higher than fixed businesses (12%). 20% of traders said they had made no profit over Carnival Weekend. This was highest for traders whose normal business was at another fixed location (36%) as well as traders from other ethnic groups (75%). The remaining 25% of traders who had made a profit gave figures ranging from £200 to £2,200 – less than fixed businesses which ranged from £100 to £5,000.

Comparisons of profits with Carnival weekend 2001
The views of traders on profits were very similar to their views on sales. 52% of all traders were able to compare approximate profits with 2001; although, like sales, the majority of traders normally establishing stalls (80%) could not provide a comparison.
As with sales, 10% of traders felt sales were up on 2001, again higher for traders that only set up stalls for Notting Hill Carnival (17%); again these were the only type of

trader that felt profits were higher than 2001. 38% of traders thought profits were less than 2001, again much higher than fixed businesses where only 21% felt profits were down.

A comparison of the change in customers, sales and profit since 2001 for all business, reveals that around 40% of traders were consistent in feeling customers, sales and profits were down on 2001. It also reveals traders, like fixed businesses, were better able to provide an opinion on customers rather than sales or profits.

Proportion of traders' annual sales represented by Carnival
Traders were asked what proportion of their annual sales Carnival represents. More than half (55%) were unable to provide an estimate, far higher than fixed businesses (17%). 45% of traders were able to provide an estimate.



15% of traders felt Carnival sales were less than 10% of their annual sales; 10% of traders felt the proportion of annual sales was between 10% and 40%; a further 10% between 40% and 80%; and 10% of traders said Carnival sales accounted for all of their annual sales. The estimates given by traders were far higher than fixed businesses, where the highest proportion was 25% of annual sales.

The figures suggest that traders rely heavily on Notting Hill Carnival for their annual sales, in some cases Carnival sales represent their sales for the whole year. By implication, the impact on traders of this annual event is considerable.

Costs to traders over Carnival weekend
Traders, like fixed businesses, were asked to estimate any costs they incurred over Carnival Weekend. The types of costs traders were asked to estimate included labour, goods supplied/raw products, heat, light, fuel etc, and other costs.

Traders were better able to provide estimates of costs than fixed businesses. Nevertheless, between 40% and 63% of traders could not estimate various costs. Samples become too small to compare types of traders.

	Don't Know	Less than £200	£200-£400	£400-£2000	£2000-£3000	Total
Labour	50%	17.5%	15%	15%	2.5%	100%
Goods supplied/raw products	40%	5%	7.5%	45%	2.5%	100%
Heat, light, fuel etc.	45%	35%	17.5%	2.5%	0%	100%
Other costs	62.5%	15%	12.5%	10%	0%	100%

Base: All Licensed Traders; Percentages
Source: Notting Hill Business Survey 2002, CSR Partnership

Where Traders were able to give estimates of costs, they said goods supplied/raw materials cost the most, unlike fixed businesses, where labour was the highest cost. 48% of all traders said the cost of goods supplied were between £400 and £3,000, with 12% less than £400. Labour costs were the next highest, with 17% of traders estimating between £400 and £3,000, and 33% less than £400. Most of those traders able to estimate heat fuel costs (53%) stated they were less than £400, and other costs (28%) less than £200.

It is difficult to compare costs against sales and profits. The information provided by less than half of traders (45%, see earlier) suggested sales figures of between £450 and £6,000 and profits of between £200 and £2,200. If these figures are accurate, any costs incurred by Carnival Weekend were offset by the benefits to traders. However, of concern is that a fifth of traders said they had not made any profit at all, suggesting some traders did not benefit from trade over the Carnival Weekend.

People employed by traders during Carnival weekend
Traders were asked how many people they employed over Carnival Weekend and how different this was to Carnival in 2001. The question was split between full-time and part-time staff. Unlike fixed businesses, where all respondents were able to provide information, almost a third of traders (30%) could not answer this question.

People employed full-time
Almost a third of traders (30%) could not say how many people they employed full time. 8% of traders did not employ any full-time staff. 12% of traders employed between one and two people full-time, highest for traders usually establishing stalls (40%). 38% employed between three and five people full-time, highest for traders only setting up stalls at Notting Hill Carnival (48%). 12% employed between six and 12 full-time staff, highest for traders usually establishing stalls (40%).

People employed part-time
Again, 30% could not answer this question. Half of all traders did not employ any part-time staff, highest for traders establishing stalls (80%). Around 10% of traders employed between one and two people part-time. Similarly, 10% employed between three and four people part-time, highest for traders whose normal business is at another fixed location (18%).

Full-time and part-time staff compared Carnival weekend 2001: traders
Traders were asked to compare their employment patterns with Carnival Weekend 2001. However, 40% of traders could not compare full-time staff with 2001, and 78% could not compare part-time staff, including all traders establishing stalls. 38% said they employed the same level of full-time staff as in 2001. 12% said they employed the same level of part-time staff as 2001, rising to 27% of traders whose normal business is at another fixed location. Very few traders said they employed more full-time (5%) or part-time staff (3%) than Carnival 2001. 18% said they employed less full-time staff and 8% said they employed less part-time staff than during Carnival 2001.

Those traders able to answer this question therefore paint a fairly gloomy picture for employment patterns since Carnival 2001. By far the majority of traders who could answer said that employment was either the same or less than Carnival Weekend 2001.

Where employees of traders live
Traders were asked if they could specify where employees, including themselves, usually lived. The local economic impact is unlikely to be as great as for fixed businesses, since many traders are not based locally. Unlike fixed businesses, where their location is known and it is based near Notting Hill, traders could be based anywhere.

LOCAL BUSINESSES AND TRADERS

Traders were asked roughly what proportion of their employees, including themselves, are from West London, the Rest of London, the Rest of the UK or Abroad. A fifth of all traders (20%) employed all of their staff from West London – highest for traders whose normal business is at another fixed location (37%) and lowest for traders who only set up stalls for Notting Hill Carnival (13%). Around a third of all traders (33%) employed more than half of their staff from West London, rising to 46% of traders whose normal business is at another fixed location. However, more than half of all traders (55%) did not employ people from West London. In this respect, traders vary greatly from fixed businesses where more than half of all businesses employed all their staff from West London and only 5% did not employ any people from West London.

Half of all traders employ all their staff from the Rest of London – higher for traders whose normal business is establishing stalls at festivals/carnival (60%); 85% did not employ people from the Rest of the UK – and only 10% of traders employed any employees from the Rest of the UK; almost all traders (95%) did not employ people from Abroad, in contrast to fixed businesses where almost a quarter of fixed businesses employed people from Abroad.

These figures suggest that the local economic impact of traders' employment patterns is likely to be much lower than local businesses since fixed businesses employ a high proportion of local people, i.e. people living in West London. Many of the economic benefits are therefore likely to be reaped by people living in the Rest of London, not in west London itself.

Suppliers of goods and services to traders
Traders were asked about their suppliers of goods and services in the same way as fixed businesses were asked. As with employment patterns, it is unlikely that the knock-on 'multiplier' effects will be as great as those for fixed businesses based locally.

28% of all traders source all of their goods and services from suppliers in West London – rising to 46% of traders whose normal business is at another fixed location – and around 40% of all traders source at least half their goods and services from suppliers in West London. However, 53% of traders do not receive any goods and services from West London suppliers. Traders are therefore less likely to use suppliers based in West London than fixed businesses.

43% of all traders source all their goods and services from suppliers in the Rest of London – and 55% source at least half their goods and services from this area. A small proportion of traders (5%) source all of their goods and service from suppliers in the Rest of the UK – but the vast majority (88%) do not use suppliers from the Rest of the UK; and 93% do not receive goods and services from suppliers outside the UK.

The findings suggest that traders' linkages with local suppliers in West London are not as strong as those of fixed businesses. Nevertheless, traders use a sizeable proportion of local suppliers so some of the economic benefits are still likely to be felt locally. Of the supplies sourced elsewhere, the majority are received from the Rest of London, suggesting knock-on 'multiplier' effects through the supply chain of traders are likely to be greater in the Rest of London than in West London.

Applications for licences
Traders were asked to indicate from where they obtained their licence for trading and whether their application was dealt with efficiently and promptly.

Almost two-thirds of all traders (65%) obtained their licence from Kensington and Chelsea and over a third of all traders (35%) from Westminster. This split was very similar for each type of trader. By ethnic group, almost three-quarters of Black traders (73%) obtained their licence from Kensington and Chelsea whilst 67% of White British traders obtained their licence from Westminster.

The vast majority of traders (85%) said their licence application had been dealt with efficiently. 10% of traders felt their application was not dealt with efficiently – higher for traders whose normal business involved establishing stalls (20%). Only 60% of traders whose normal business involved establishing stalls at festival/carnivals said their licence application had been dealt with efficiently. Over a third of traders (35%) did not know if their application had been dealt with promptly. 58% said their application was dealt with promptly, leaving 7% who had encountered difficulties, once again higher for traders whose normal business involved establishing stalls (20%).

Traders seem generally satisfied with obtaining licences from Kensington and Chelsea and Westminster, although traders whose normal business involved establishing stalls experienced some problems.

Suggestions on how Carnival could be improved: traders

Traders were asked if they had any suggestions on how the organisation of the Carnival could be improved. 73% offered suggestions, and many traders provided more than one suggestion.

- A quarter of all traders felt that the size of the pitch was small and overcrowded – higher for traders whose normal business involved establishing stalls (40%).
- Calls to improve electricity and water supplies were made by 13% of traders – rising to over a fifth of traders (22%) who only set up stalls for Notting Hill Carnival.
- 10% suggested reducing fees for stalls – higher for traders whose normal business involved establishing stalls (20%).
- 8% felt there was no choice in stall allocations – rising to 40% of traders whose normal business involved establishing stalls.
- Rubbish collection and requests for more bins to be provided was important to 8% of traders – once again higher for traders whose normal business involved establishing stalls (20%).
- Other practical suggestions include more communication between traders, ensuring permits are sent out earlier, priority sites for regulars, allowing access to set up stalls and providing more toilets.

What traders are asking for
"Better locations along main route"
"Sound systems more reliable"
"Council could hire equipment out to reduce costs"
"Less stalls hired out"
"Police not warm/approachable"
"Able to serve alcohol with meals"
"More scrutiny on illegal traders"
"More scrutiny on drug usage"
"Unit of Inspectors should be set up"
"Other sellers on wrong pitches"
"Provide large pitch for increased fee"
"Improve safety/have a safety meeting"
"Keep multi-cultural"
"One set of rules for everyone"

Traders supplied a vast array of suggestions on how the organisation of Carnival could be improved. Many suggestions are very practical and some involve agencies involved both directly and indirectly in the running of Carnival. Far from viewing some of these ideas as criticisms, they are positive suggestions and could be built upon to improve the organisation of Notting Hill Carnival in 2003.

CREATIVES

4.1 Introduction

"Despite widespread activity, influence and long-established histories, despite high profile as a significant arts event with important and valuable contributions to make to British cultural life and contemporary arts practice, Carnival practice, and more specifically, the aesthetic and contemporary arts practice it represents, remains largely underdeveloped, misunderstood, misrepresented and marginalized" (Geraldine O'Connor, 1996 p.1) .

'Carnival' is everywhere. It is a metaphor for vibrancy, colour, 'the exotic'; violence, confrontation, crime; 'racial harmony', hybridity, new cultural formations. It also holds a prominent position within the cultural landscape of London, contributing to the identity and 'image' of London in ways that add significant value to the tourist economy in and beyond the Notting Hill area. Yet, as this chapter reveals, this 'economic impact' does not adhere to a simple model where a cultural product (Carnival) is consumed, with numerous economic multiplier effects (such as increased expenditure in restaurants). Instead, this chapter introduces 'the business of Carnival'; the complex processes of production and consumption, supply-chain formation and creative skills practice that underpin the advancement of Carnival as a 'product'.

This chapter sets out to offer a perspective on 'Carnival' that emphasises the significance of the constituent creative production processes for its overall economic impact. The chapter therefore focuses on those 'production houses' of Carnival: mas camps, steel bands, sound systems, and community-education projects. This chapter therefore complements the other chapters in this report by revealing some of the multiple creative supply chains that criss-cross the production of Carnival. These include:

a) The strictly 'economic':

- The public and private sponsorship of individual creative activities (such as mas camps). Specifically, the capacity of Carnivalists to raise funds and the willingness of funders to support Carnival. Also considered here is the extent to which Carnival might be under-funded.
- The financial investment of creative practitioners in the 'production of Carnival'. The focus here is on the ways Carnival is produced at a cost to Carnival practitioners. It has its own internal economy (for example, many mas camp members pay a levy for their membership), which in turn has externalities (costume materials are bought from local shops; sound equipment is hired etc.).
- The 'additionality' that Carnival brings to production processes. Carnival is a flagship for a range of cultural forms, which in turn reap economic reward through their showcasing at Carnival. Moreover, Carnival has helped to establish a mini 'Carnival industry', where Carnivalists work in the education sector across the UK and beyond, teaching the histories and creative skills of Carnival.
- The significant (perhaps inestimable) in-kind contributions made by dedicated Carnival practitioners. This is to compensate for under-investment from other sources; and because Carnival and its preparative process is a ritualised process dependent upon immensely committed groups and individuals for whom Carnival is a 'way of life'.

b) The 'socio-cultural':

- The power of Carnival for building communities. This operates on the scales of both the local neighbourhood and the city. Carnival has a capacity to cross ethnic boundaries and create new senses of community. This has considerable implications for how London is perceived; and how different people understand themselves and each other.
- The empowering capacity of Carnival. The event and its constitutive processes provide otherwise marginalised groups and individuals with opportunities to express themselves creatively, to meet other people, and to perform and thus be seen and heard for perhaps the first time.

c) The 'educative':

- Carnival provides a forum for the exploration and expression of multiple cultural histories, identities and contemporary senses of place. Carnival is a major symbol and process of socio-cultural transformation in contemporary Britain. Carnival in London is linked to other Carnivals across the world, past and present. It contains many narratives, linked to European traditions such as the Roman feasts of Saturnalia and Isis or the pageantry and mimicry of the Romantic Movement or Faschnacht masquerades in Germany and Scandinavia. These influences have been fused together in the crucible of slavery, colonization and colonial expansion in regions such as The Caribbean. And they have been further transformed through continued migrations to emerge as 'Carnival' dances through the streets of London. Carnival thus provides a history, geography and sociology lesson. d) The 'practical':

d) The 'practical':

- Carnival is dependent upon the application of a diverse range of what might be termed 'creative industries skills'. From costume design and manufacture to the technicalities of putting a sound system 'on the road', Carnival facilitates creative skills development for many individuals who might otherwise lack such opportunities. In some 'parts of Carnival', such as a small number of mas camps, the connection between skills developed at Carnival and the demand for creative industries skills in the wider economy is conspicuous and thus provides a focus for their activities. However, in general, the potential for Carnival to operate as a key driver for creative industries skills development for the London economy is not being realised. Here, the chapter focuses on the transferability of creative skills developed through Carnival, such as in fashion and theatre; but also on the potential for a range of creative industries sectors to add value to (and learn from) the Carnival process.

This chapter is based upon a series of qualitative interviews with Carnival practitioners (these are presented here as individual 'Carnival narratives'). It seeks to 'capture' a range of attitudes to and processes of engagement with Carnival.

4.2 Public sector sponsorship

The creative business of Notting Hill Carnival is dependent absolutely upon considerable public sector sponsorship. Without the contributions from the public sector, the constituent creative practices of Carnival would operate at such a low level as to utterly transform the Carnival in terms of its size, quality and thus impact. To this end, sources of investment such as London Arts' Carnival Fund, The Millennium Commission's Awards for All fund, The Peabody Trust's 'Champions for Change' fund, and the often significant contributions made by local authorities (from departments of education, social services and economic development/regeneration), are vital to the survival and development of Notting Hill Carnival. Collectively, such funds contribute many thousands of pounds to the development of Carnival Arts in London.

However, given the economic impact (existing and potential) of Carnival, and especially considering Carnival's capacity to combine high art with educational, skills development, community-building and confidence-raising activities, the level of public sponsorship is relatively low. It seems that Carnival Art remains under-valued and the potential of Carnival to transform lives and local economies under-appreciated.

Moreover, and of equal significance, sources of public sponsorship for Notting Hill Carnival are ill-conceived and fragmented in their distribution. The lack of dedicated 'Carnival funding' requires that fund-raisers apply for a range of funds, each with a different set of priorities.

This precipitates a jarring process where fund-raisers attempt to dress-up their activities to suit the priorities of the funders and thus change their own priorities in ways that are often detrimental to the Carnival product. When, as in many cases, fund-raisers are applying for many different funds, the focus of the Carnival production process is lost, replaced instead by a blurred and discordant attempt to satisfy the requirements of several different funders concurrently. The need for strategically complementary funding packages for Carnival is as important as the simple requirement of increased funding.

Of related significance is the need for improved fund-raising and arts management skills for Carnival practitioners; or, where possible, the introduction of expert fund-raisers and managers to work within Carnival. While Carnival does provide an excellent training context for aspiring fund-raisers or arts managers, its constituent art forms may suffer due to the absence of a skilled fund-raiser in, for example, a given mas camp. Carnival practitioners are in many cases struggling to maintain a creative focus while searching intensively and then applying for funds. Many such practitioners are not aware of the range of potential funds available or, vitally, how to play the game to access such funds.

This has a direct relationship with the economic impact of Carnival. The Carnival product determines the economic impact, which is therefore dependent upon a level of public sector sponsorship. If this is absent, fragmented, hard-to-reach and distracting, then the Carnival product suffers and the potential economic impact is not realised. Under-investment in Carnival, under-investment in the skills required to fund and manage an enormous event (which is made up of a multitude of component parts), and the absence of a strategic approach to funding the Carnival process, therefore have direct material consequences. An assessment of potential approaches to funding and skills development reform would be beneficial.

4.3 The Significance of Private Sponsorship

Private sector sponsorship of the Notting Hill Carnival provides valuable revenue to the business of Carnival. However, like public sector sponsorship, it is fragmented, extremely difficult to attain, very challenging to retain, and requires a high standard of fund-raising and arts management skills to win.

In addition, the private sector (certainly larger corporate sponsors) are more likely to provide sponsorship for a whole event than to support the constituent parts and ongoing processes that underpin the event.

The reality of how sponsorship actually works has implications for how Notting Hill Carnival is marketed and branded to potential sponsors. For example, one long-running problem for Carnival is a mainstream media representation that criminalises and racialises Carnival (see Chapter 6 below). This has obvious implications for would-be sponsors, sullying their impression of a high quality product with a potentially enormous market. Media representations of Notting Hill Carnival have improved in recent years, with an occasional intervention that explores the complex histories of the event or uncovers the multi-layered aesthetics of Carnival Art. However, Notting Hill Carnival requires an injection of high quality PR if stereotypes are to be displaced by a focus on the economic potential of the event (and its internal business) to provide a key focus.

It is important that private sponsors are persuaded of the commercial benefits of their investment and of the new markets they will reach. Moreover, it is important that sponsors are convinced of the need to sponsor not just the event, but also the year-long preparations for Carnival

CREATIVES

(or at least provide the capacity for funds to be distributed throughout the Carnival production chain). This will assist in the ongoing production of Carnival and provide sponsors with a year-long profile and an active year-long market.

However, with private (and to a lesser extent public) sponsorship, issues of ownership become significant. Ongoing disputes about the meanings of Carnival ('who' is it 'for' and 'who' is it 'by'?) have in recent years brought into question the role of sponsors, with a widespread concern that a dependence on sponsorship, in particular large-scale corporate sponsorship, has the effect of overly commercialising Carnival, of transferring ownership into the private sector, and of therefore undermining the ownership of those with a long-term, sustainable investment in Carnival: the Carnivalists.

The effective management of sponsorship relations is therefore of primary significance, both to win and retain funding and to ensure that corporate branding does not taint the individuality and invention of Carnival's many forms. One solution is perhaps to distribute large-scale corporate funding to different localised Carnival disciplines (such as the mas camps), allowing such fora to develop a relationship with the sponsor and maintain a sense of distinctiveness and ownership. It is when a large-scale corporate sponsor forcibly envelops an entire event with little connectedness to the grassroots that problems occur.

This in turn has implications for how the business of Carnival is managed. Just as with public fund-raising (and the consequent management, monitoring and accountancy issues), there is a significant skills gap amongst Carnival practitioners in the mas camps, steel bands and so on, in terms of their capacity to build relations with the private sector. This applies to fund-raising (identifying sponsors and selling them a product that demands sponsorship), and the management and maintenance of funding relations (ensuring that the sponsor is proud of the investment and seeks to continue supporting Carnival). The future sustainability of Notting Hill Carnival depends upon bridging such skills gaps.

4.4 The In-Kind Economy

The Notting Hill Carnival is dependent upon, indeed driven by, the in-kind investments of Carnivalists, volunteers and sponsors. The level and dynamics of in-kind investment to Notting Hill Carnival is too large and complex to feasibly quantify and map.

The ongoing hard work of Carnival – practised and embodied in the mas camps; through steel pan manufacture, composition and practice; on the backs of trucks by performing DJs; is one of its key defining principles. For example, much sociological and cultural studies research has focused on the hard graft of mas camp members as they engage in the repetitive yet innovative process of costume-making to create costumes as distinctive socio-cultural achievements that capture many narratives of culture and identity. Such mas camps are seen as fundamental to Carnival.

However, there is a danger that the enormous in-kind investments to Carnival are taken-for granted. Undoubtedly, such activities will continue and, for a small number of practitioners, they will be performed without questioning the role (even responsibility) public and private sponsors might have in supporting their activities. Yet for many Carnivalists, in-kind activities at their present scale cannot be expected to continue in perpetuity. This research has revealed a perception amongst some Carnivalists that their art form is neglected and marginalised; that it is indeed, in a patronising way that would not be applied to other disciplines, taken for granted.

Such arguments have a particular resonance in certain disciplines, such as those requiring of a specific (often transferable) skill, or those providing services that might be delivered by others (such as arts management roles).

It is in these areas that the economic value of in-kind investment is highest. For example, a costume designer, employing skills transferable to fashion design and drawing on centuries-old Carnival costume-making skills, provides skills and labour to the Carnival process that would come at a significant price in the creative industries sector. While contribution to Carnival might add value to the designer's wider portfolio or introduce new skills, the continued and sustained contribution from such an individual cannot be guaranteed. It is therefore important that ways are found to invest in the creative skills of Carnival. This has implications for the quality of the Carnival product (it can only be improved) and for the development of upgraded skills-sets for the creative industries sector as a whole.

If the full potential economic impact of Carnival is to be realised, it would be strategically unsustainable for it to be based upon the goodwill of (often skilled) volunteers. Yet in-kind investment will remain vital and should be encouraged. Carnival places special demands upon a volunteer workforce throughout the supply chain. This is one of the factors that provides Carnival with its unique atmosphere and establishes it as a key binding mechanism for community and place. However, professional creatives should be supported and rewarded in professional ways. Otherwise there is a danger that Carnival will move increasingly towards the community arts sector, abjectly falling short of its economic potential.

4.5 The economic multiplier effects of creative contribution

The economic multiplier effects of the creative contribution to Notting Hill Carnival are sporadic, inconsistent, under-developed and in many cases unrealised. The actual money spent by Carnivalists, though significant to them, is insignificant relative to the expenditure of, for example, tourists visiting the Notting Hill Carnival. While expenditure from Carnivalists can improve turnover for local shops (such as where the mas camp is based), with interesting small supply chains developing (such as through links to Asian fabric shops), this research has shown two factors to have the most significance

First, the component creative parts of Carnival have little economic impact on their own. It is the aggregation of mas camps, steel bands, sound systems and other creatives that defines the Notting Hill Carnival, draws the crowds, and is thus directly responsible for the broader economic impact of the event.

Second, the most significant multiplier effects benefiting the creative producers of Carnival are expressed in terms of the ability of Carnival to leverage investment from elsewhere, to broker new opportunities, and to facilitate the development of what might be termed a Carnival Industry, predicated upon broader creative industries supply chains. For example, a record shop owner sells more records due to the increased profile provided by a creative contribution to Carnival. Similarly, a DJ gains kudos at Carnival that transfers directly into new DJ-ing opportunities outside of Carnival and the reputation necessary to charge higher fees. In this sense, Carnival operates as a classic marketing tool for some creative disciplines or products.

Indeed, the Notting Hill Carnival provides the highest profile stage in Europe for the performance of Carnival Arts. The history, aesthetics and skill levels necessary for costume design, the specialism required to manufacture, tune and arrange steel pan, and the mellifluous sounds of soca and other music are all showcased at Notting Hill Carnival. This provides the opportunity to develop commercial links with the theatre and performing arts sector; to travel the world playing steel pan; and to introduce soca music to new audiences, and thereby establish a sustainable market for the genre.

Moreover, it enables individual creatives to flourish. For example, because the Notting Hill Carnival raises the profile of Carnival Arts and helps to create a market for its teaching, those knowledgeable of the history of Carnival Arts and skilful in its execution are provided with opportunities to teach the discipline in schools and evening classes. Furthermore, Carnival provides a context for the active development of a broad range of creative skills, often for groups and individuals otherwise absent from creative sectors. Carnival is thus contributing to the introduction of new generations of creative industries practitioners from diverse backgrounds. This contribution is, however, under-developed, and the potential for skills cross-over into the creative industries sector largely unfulfilled. This is explored more fully in the next section of the chapter.

4.6 Carnival Creative Industries skills development

The Notting Hill Carnival is dependent upon the largely in-kind contributions of thousands of people, actively working to create new, inspiring cultural forms for their display and performance at Carnival.

Activities range from the highly specialist (such as wire-bending for costumes), to the basic (such as sticking sequins on a costume). Yet every activity provides a gateway into the creative industries sector. For example, the role of a Carnival costume designer is closely linked to a fashion designer or a costume designer for theatre. Alternatively, a costume designer may have options transferring some of his/her knowledge within the education sector – for example, through Carnival costume-making workshops. Conversely, a fashion designer may improve his/her skills and thus his/her market value by designing costumes at Notting Hill Carnival. The Carnival is thus closely linked with the broader creative industries and education sectors.

Moreover, Notting Hill Carnival introduces a myriad of new opportunities for young people from diverse backgrounds who might not otherwise engage in a creative discipline.

Clari Salandy of Mahogany, one of the Carnival practitioners interviewed for the study, suggests that Carnival Arts provide a 'street cred' way of getting male youth to do art and fashion. Indeed, many creative fora in Carnival are working to engage with local communities to encourage participation in Carnival Arts, often through the form of skills-orientated workshops (the work of Ebony, Mahogany and Perpetual Beauty/Odyssey provide examples here). Carnival has the power to inspire individuals to pursue careers in the creative industries, to consider options that previously were out of bounds.

However, although this situation, as it is today, has positive implications for the development of Carnival Arts – and Carnival itself – with some cross-over into the broader creative economy; the economic potential that Carnival holds in terms of the development of creative industries employment, remains severely under-explored. The need for an intensive and applied approach to creative industries skills development in Carnival is required. At present, Carnival practitioners are crossing into creative industries careers by chance. To make this crossing seamless – a systematic, natural and desired progression – requires the introduction of intermediaries to develop a signposting role, together with the introduction of more disciplined creative industries training techniques and programmes within the Carnival process.

If, through the production of the marvellous spectacle of Carnival, young people from diverse backgrounds are receiving training in pattern-cutting, event management, circus skills, photography and product design, then the economic multiplier effects of Carnival will become more coherent, substantial and targeted.

Moreover, this will impact upon the demographic profile of the creative industries sector, with new entrants from Black and Ethnic Minority groups establishing the sector as more representative of London's population. The sector at present is relatively white, male and middle class.

Such an approach would also assist in the sustainable development of Carnival and its constituent Carnival Arts. In addition to ensuring that new generations of costume designers are nurtured and trained, it would establish opportunities for the growth of other creative industries sub-sectors within Carnival. For example, film-making could be supported, with an end product such as a moving image documentation of the Carnival that could be sold each year as Carnival merchandise. Alternatively, courses in music production might promote the development of a UK soca music scene, perhaps with an annual 'Carnival album' released, just as at other 'World Carnivals' such as in Port of Spain, Trinidad.

An applied approach to creative industries training at Notting Hill Carnival would have two desirable side-effects. First, it would raise the profile amongst Carnival practitioners of the economic potential of their activities (in terms of their skills transference). This would end the unacceptable demands laid on the good will of in-kind practitioners. Second, it would establish an opportunity to pay for some of the skills, most of which are currently provided in-kind. This is because an organised, targeted creative industries skills initiative for the Notting Hill Carnival would open the Carnival process to new funding opportunities, such as through regeneration and training monies, of which a considerable amount is currently targeted at the creative industries sector in London.

4.7 The Socio-cultural impact of creative contribution

As discussed above, the creative production of Notting Hill Carnival – the Business of Carnival – is saturated with possibilities for a greater economic impact. This should not, however, lessen the importance given to Carnival an astonishingly powerful medium in the personal development of individuals, in fostering senses of community, and as a potent and compelling symbol of what it means to be a Londoner and what it means to be British.

Carnival's economic impact cannot be understood without some recognition of the enormous social and cultural impact of the event and its constituent processes. For example, too narrow a focus on creative skills development and the potential transfer of skills developed at Carnival to the wider creative industries economy, ignores the huge contribution made by many Carnivalists for whom skills development is not a priority. Many practitioners at Carnival make costumes, play pan, jump-up, because it is an edifying social activity, it is an important act of collective memory and – of course – it can be a lot of fun.

The power to bring diverse communities together – to give many people a sense of belonging and place, to offer comfort in the face of a disillusioning urban environment, to raise the confidence of disillusioned young people, to provide a transitory sense of importance by reclaiming the streets for one weekend, to have a voice – remains an important factor underpinning Notting Hill Carnival.

CREATIVES

The comfort and pleasure that Carnival gives and the capacity it has to unite diverse communities provide the conditions necessary for an economic impact. Without an appreciation of the socio-cultural basis of Carnival – its multiple aesthetics, histories, geographies, internal cultural politics, motivating factors; its very raison d'être – a sensitive and thus sustainable approach to the economic development of Carnival would not be achievable.

For the majority of Carnivalists, the event and its constituent practices are not understood in terms of their commercial potential. For this reason, commercial potential must be explored by remaining loyal to the non-commercial, socio-cultural basis of Notting Hill Carnival.

ECONOMIC IMPACT

5.1 Introduction

This chapter of the report draws together the data collected to provide an assessment of the overall economic impact of the 2002 Notting Hill Carnival. First, it looks at the direct, indirect and induced income effect. This includes a discussion of what items are to be included in these elements, issues around estimating the different parameters of the calculations such as number of attendees and average spent per person, and issues around the choice of multipliers. The impact data being estimated here is the impact on the London economy.

Following this, an estimate is given of the job impact of the 2002 Carnival. A brief review of costs is also included.

Finally, this chapter looks at the less tangible economic benefits of the Notting Hill Carnival on the London economy.

5.2 Direct Income Impact

The visitors' survey allowed reasonable estimates to be made of the average spend per person attending the Notting Hill Carnival in 2002, including an estimate of travel costs and, where relevant, accommodation costs. In order to obtain statistically robust estimates, a sufficient number of people were interviewed over the three days and care was taken to make the sampling as random as possible. However, there were obviously difficulties given the nature of the event. These included interviewing people who were arriving at the Carnival as well as those who were leaving which means that the estimates mix expectation of spend with actual spend. This may introduce a downward bias on the figures.

The estimates of average spend per person on each day were included in Chapter 3 and are reproduced in the table below (excluding spending on accommodation), together with an estimate of the number of attendees per day. There are uncertainties in the latter. The only estimates available for attendance in 2002 are from the Metropolitan Police. They provide no estimates for Saturday but suggest that on the Sunday, 450,000 people attended and on the Monday 850,000 attended. Many stakeholders suggested that the police estimates may be a little on the high side. Certainly, a more in-depth study by the Intelligent Space Partnership for the GLA Carnival Review Group in 2001 produced lower estimates than the police – a total of approximately 710,000 people were estimated to have attended on the Sunday and Monday in 2001 with almost two thirds of the visitors coming on the Monday. Admittedly, all commentators contended that attendance was higher in 2002, although perhaps not as high as the 1.2 million in 1999 quoted by the Intelligent Space Partnership. We have therefore taken a slightly lower estimate than the police for the Sunday and Monday in 2002 and included an estimate of 5,000 people attending on Saturday based on discussions with stakeholders. The resultant calculations of overall spend by visitors is shown in the table below.

Day	No. of People	Average Spend per Person	Total Spend
Saturday	5,000	£58.47	£292,350
Sunday	400,000	£33.54	£13,416,000
Monday	750,000	£29.81	£22,357,500
Total	1,155,000		£36,065,850

The above table does not include an estimate of the amount spent on accommodation by those who planned to come to London specifically to attend the Carnival. Our survey suggested that, on average, those who stayed overnight (two nights) and paid for the accommodation, paid an average of £54.85 per night. The proportion of people who stayed overnight as part of their planned visit to the Carnival is 7.3% of all attendees. (Based on our literature review of other economic impact studies, it is important that only the accommodation costs of those whose visit was for the specific purposes of attending the Carnival should be included.) Based on the estimated number of attendees to the Carnival, in 2002 we estimate that 84,315 people stayed overnight in London specifically to visit the Carnival and paid for their accommodation, spending an average of £109.70 for two nights, giving a total spend on accommodation of £9,249,355.

Adding this to the estimated spend on travel and purchase of goods at the Carnival, the direct income effect of visitors to the Carnival is **£45 million**.

One criticism raised of other economic impact studies of festivals is that the spend of local people was included. We have done this in this case because over 70% of local residents who attended the Carnival said they had specifically stayed in London from that weekend to visit it. It therefore appears appropriate to include the spend of local residents in the economic impact figures.

5.3 Indirect and Induced Income Impact

As explained in Chapter 2, there is also a multiplier effect as a result of the businesses, traders and carnival groups spending the income they receive from visitors (and from grants and sponsorship) on supplies and goods from other firms (the indirect multiplier) and as a result of their employees spending their wages on goods and services from other business (the induced multiplier). The issue is what multiplier should be chosen to cover both these effects.

To have an accurate multiplier estimate, an input-output model of the London economy needs to be developed and the specific position of the economic sectors represented at the Carnival examined. No such model exists and the resources for this study did not allow one to be developed. However, the business and traders survey did give an indication of the extent to which business and traders and their employees were integrated into the London economy. These surveys suggest a very high integration.

Based on this, it appeared appropriate to apply the multiplier suggested in the British Arts Festival Association report of October 2002 . This study suggested a multiplier of 1.99 be applied to visitors spend. (This is not much higher than the 1.7 multiplier suggested by the Treasury in 1995 for the economic sectors with strong local supply linkages and income or induced effects.) Applying this multiplier to £45 million direct expenditure by visitors in 2002 gives an overall income impact of £90 million.

To this needs to be added the multiplier effect of grants and some of the costs of running the Carnival. The direct effect of these cannot be included as they are either costs or circulated tax revenues. However, the multiplier effects can be included. Our research suggests that there were grants given of approximately £1 million and that the costs of running the Carnival were also £1 million, this gives a combined total of £2 million. (We have excluded the policing costs from this – the police estimate that including training, policing costs at the weekend and other enforcement costs, they spent £6 million on the Notting Hill Carnival.)

The BAFA study suggests that a multiplier of £1.49 can be applied to this £2 million, giving an indirect and induced impact of £3 million. **This brings our estimate of the overall income impact to £93 million**. This dwarfs the estimated costs of the Carnival of £8 million.

5.4 Jobs

The BAFA study also suggests that for every £1 million of income impact, 32.1 full-time equivalent jobs are generated. This suggests that the Carnival produces a jobs impact of 3,000 full-time equivalent jobs per year.

Clearly, this is a very broad estimate – and other ways of calculating the job effect produce lower results. (For example, the 2002 'Economic Impact of Tourism Expenditure in London 2000' by Geoff Broom Associates suggests that in the retail sector, one full-time equivalent job is sustained by £60,000 turnover. This would give an estimate of 1,600 full-time equivalent jobs.)

In addition, the fragmented, seasonal and casual nature of many of the sectors represented at the Carnival suggests that a full-time equivalent figure does not necessarily give a good picture of the jobs impact. Indeed, far more than 3,000 people may be sustained in some kind of employment as a result of the Carnival but many of these jobs will be part-time or casual.

5.5 Other Impacts

The estimates above do not take into account the less tangible but probably far more important economic benefits of the Notting Hill Carnival to the London economy. These include:

- The importance for London's image as a tourist destination and as a cosmopolitan place to live in which was reflected in our visitors survey. Our view is that this is a particularly important benefit and one that could be increased substantially by better and more integrated marketing of the Carnival.
- The increases in spending in shops before (and to a lesser extent, after) the Carnival weekend that were revealed in our business and trader surveys. These are balanced by the number of fixed businesses that close down over the Carnival weekend although these were not that high when account is taken of the large number of these that would close down on a Bank Holiday weekend in any case.
- The opportunities for promotion provided by sponsorship of the Carnival and the opportunities for launching products to wider audiences as a result of the Carnival. For example, the visitors survey revealed that a significant proportion of non-Caribbean people would be more likely to eat Caribbean food following their visit to the Carnival.
- The opportunities for business and skills development in creative and other industries which were discussed in Chapter 5 of this report.
- The social cohesion benefits that can result from the celebration of Caribbean and other cultures at the Carnival.

ECONOMIC IMPACT

Range of estimates

Given the wide range of estimates for crowd numbers, multipliers, and so on, it may be useful to provide a range of economic impact estimates. At the top end, taking the higher estimates of crowd numbers, the higher estimates of the multiplier from the BAFA study, and the employment multiplier taken from the same study, produce the following estimates of economic impact:

- Direct expenditure of: £51M
- Overall income impact of: £105M
- Jobs impact of: 3,370 full time equivalent jobs

At the lower end, taking the smaller estimate of crowd numbers and the 1.7 multiplier suggested by the Treasury in 1995 for economic sectors with strong local supply linkages and income or induced effects (the Notting Hill Carnival can be described as such a sector on the basis of our business surveys), the following lower estimates are yielded:

- Direct expenditure effect of: £45M
- Overall income impact of: £80M
- Jobs impact of: 1,330 full time equivalent jobs

In summary the overall income impact of the Carnival in 2002 ranges from **£80M to £105M** with a jobs impact of between **1,330 and 3370** full-time equivalent jobs.

MEDIA REPRESENTATIONS

OF THE NOTTING HILL CARNIVAL

6.1 Introduction

This chapter of the report provides a brief overview of the wide-ranging and often contradictory media representations of the Notting Hill Carnival, 2002. It is argued that these representations are a powerful influence on how the Carnival is seen as a brand.

Interpretation of contemporary media representations of the Notting Hill Carnival can help us to understand how Carnival is positioned by the mainstream – culturally, politically and social-spatially. This in turn helps us to identify Carnival's brand and market position, and thus opportunities for reform, partnership-building and sponsorship (both public and private).

It is of course not the duty of Carnival to pander to its dominant media images and thus change for the benefit of external agendas. However, if the event is to develop additional funding opportunities and to benefit from increased political support, it is vital that organizers and decision-makers have an appreciation of how Carnival is portrayed, how this impacts upon development plans, and therefore how the media can provide new opportunities for showcasing Carnival.

6.2 Background

Notting Hill Carnival has, historically, received what might be termed a bad press. The event has been pathologised, criminalised and racialised – represented as simultaneously exotic, violent and Black. When Notting Hill was an overcrowded inner-city area with a large Black population, the Carnival was represented with a descriptive unity that conflated stereotypes of place (run-down, overcrowded); race (criminal, intemperate, colourful and thus 'Black'); and the event (a ritualised Black experience operating outside the norms of aesthetic or social practice). These representations have had a direct exclusionary effect on the Black community, working to perpetuate prejudice and legitimate political practice.

Over time, the neighbourhood has changed, the cultures and identities of London and Britain have been continually reconstructed. Carnival, through its capacity to embrace and contribute to processes of cultural transformation, is a very different event from the one 30 years ago. Correspondingly, media representations have altered: gone are the pernicious ghettoising stereotypes where Carnival and – by extension – its participants are understood solely as a problem. In their place are wide-ranging, often contradictory representations of Carnival, each fashioned as part of a broader debate that positions Carnival as a key indicator of and a central reference point for understanding the present-day cultural politics of London and the UK.

Over the years, the harmful media stereotypes of Carnival have been internalised, contested, negotiated and re-worked through discourses of Carnival within Notting Hill Carnival, as, for example, an event which brings the community together despite discord and crime; and that it is free of trouble as if this is unusual given the media stereotype. There is an opportunity today to do more than react against the media: a new challenge has emerged where a more intelligent media, sympathetic to the dynamics and diversity of Carnival, can be courted to provide an articulate showcase of the complex histories, high art forms and powerful creative dynamism of the Notting Hill Carnival. After all, column inches and television/radio airtime provide bountiful in-kind advertising for the event.

While many representations of Carnival are progressive, showing at least a little effort to engage with the multiple histories and aesthetics of the event and its constituent processes, familiar stereotypes constantly re-emerge. Despite a generally favourable approach to Carnival – an apparent willingness to present Carnival in a positive light; old and new stereotypes rumble beneath the surface or are expressed subtly; sometimes almost apologetically. Either way, familiar discourses abound: of crime (or the absence of it); overcrowding; multi-coloured exotica; and Black masculinity. The issue of control (how to maintain it; the dangers of losing it) holds a social centrality within dominant media representations of the Notting Hill Carnival, carrying with it signifiers of race, community and place in ways that continue to marginalize and homogenize London's multiple and diverse Black communities.

6.3 Carnival and the Criminal…

The Notting Hill Carnival has always been associated through dominant media representations as a place of crime, disorder and violence – if not actual, then potential. Such images have worked to construct a myth that surrounds the Carnival, emphasising its potential for trouble or ensuring it is remembered in terms of the absence or presence of disorder. In previous years, few articles on Carnival were complete without an adjunct commentating on the number of arrests, the cost of the policing or the number of complaints. Crime (and a particularly racialised and gendered 'Black male crime') offered a pretext to every reference to Carnival. This was entirely complementary to the discourses of the mainstream media in the 1970s and 1980s, where Notting Hill Carnival, due in large part to its perceived 'Blackness', was considered a threat.

The construction of such direct links between criminality and race is not so apparent in contemporary media representations of the Notting Hill Carnival, but the allusion remains. For example, **The Evening Standard** conflates an appreciation of the event's West Indian cultural dynamism, followed immediately by a reference to violence and criminality:

> "There were, as usual, spectacular pageants, engaging children's processions, ferocious sound systems, and as much West Indian food as you could eat. And unlike some previous years, there were relatively few arrests, thanks to well-managed policing. The Carnival may be more corporate, less anarchic than it used to be, but to carry off a festival on such a scale with none of the violence that used to attend Carnivals past is an achievement…"

Carnival occupies a position in the media (and thus popular) imagination that requires a commentary on crime, even when there is none. Few other events are represented through this lens of criminality.

However, the 'Carnival as crime' metaphor has lost some of its previous potency. Carnivals since the Carnival riots of 1976 and as recently as in 2000 and 2001, had a focus saturated with issues of criminality, policing costs and associated racialised politics. This was due in large part to tragedies such as stabbings and other public order incidents:

> "During last year's Carnival two people were murdered and several assaulted in a string of attacks, leading for calls for the festival to be radically scaled down or even abandoned".

The absence of serious public order or occurrences of crime in 2002 has lessened the profile of Carnival as criminality, but the potential for criminality remains a central media theme. **The Daily Telegraph**, after a few lines focusing on the "colourful dancers" and "sunshine",

LDA004 - Research 13/6/03 9:50 am Page 52

makes the seemingly obligatory reference to crime – “21 arrests for offences including drugs and possession of knives”; or the relative absence of it -”(T)he police said “we are very pleased with the way it is going so far…the mood is still very happy and we hope that will continue” .]

Significantly, this contentedness with the level of crime is presented with caution: there is a danger that trouble may develop at any time. Correspondingly, the major reason for the relative absence of disorder is linked to substantial increases in the number of stewards for 2002; more police; a slight route change; and because:

> “The police had carried out intelligence operations before the event and arrested known troublemakers in an attempt to avoid the crime that has marred the Carnival in recent years”.

The Independent maintains this discourse, in an article entitled “Crime suspects barred from London Carnival”. By establishing Carnival as a latent stage for criminality, the event is constructed as requiring control, order and pacification. Carnival is thus inherently unstable; and requires intensive policing and high level stewarding: it is viewed as **something to control**.

Indeed, the high cost of policing the event (£5.6 million in 2001) is deemed necessary if the event is to be controlled. Reports that costs were incurred for such gadgets as hand held metal detectors to help officers identify people carrying guns and knives added a level of glamour to the coverage.

Other elements of the press (notably the ‘Black press’), such as **The Voice**, contest the stereotype of Carnival as an insurrectionary, criminal space. For example, Mike Best, Editor in Chief of **The Voice**, stresses that violence and criminality is “alien” to the Carnival spirit and that:

> “The Carnival has no place for trouble-makers and you can’t blame it for trouble. Such behaviour is alien to Afro-Caribbean culture”.

Carnival is not inherently outside the moral and legal restraints of mainstream society, it is just presented as such, with the discussion framed in such a way as to continually reinforce this, albeit subtly. This presents a challenge to Carnival organizers and associated authorities: how to present the event as inherently safe while maintaining the cathartics, abandon and cultural integrity of the event? How to create an impression of safety without having to constantly refer to safety, which of course perpetuates the stereotype of the event as unsafe?

6.4 Carnival and the Exotic…

Parallel and often complementary to mainstream media representations that to an extent criminalise Carnival, are softer, less overtly pernicious, racialised stereotypes, focusing on Carnival and the exotic. There is a strong pattern of media representations of the Notting Hill Carnival that focuses on the colour, exoticism and sunshine faces of Carnival. Such approaches are often positioned purposefully in contrast to discourses of criminality, perhaps as a way of isolating the unruly. However, such approaches are also positioned relative to parts of the Carnival’s creative portfolio, such as the sound systems, which might be deemed as representative of the more seditious, unpredictable elements of Carnival. In this sense, representations of parts of the Carnival as simple exotic fun work to ignite disputes internal to Carnival regarding the authenticity and cultural relevance of certain creative forms (such as different sound system cultures) to the spirit and content of a traditional Carnival.

However, the evocation of a good-spirited, lilting Carnival does not, in practice, support the case of Carnival traditionalists. Indeed, such discourses deny the Carnival depth, undermine its cultural credibility and elide the histories of bloodshed and hard-fought cultural expression that have brought Carnival to the streets of London through centuries of oppression. Such discourses effectively trivialise the basis of the event.

The tabloid press rarely ventures beyond the familiar shorthand of criminality and exoticism, often linking them together through the requisite photograph of a White policeman dancing with/holding a Black child. Yet, the broadsheets are also capable of perpetuating the stereotype:

> “Sunshine and children’s floats delight crowds at Europe’s biggest street party…every colour…followed on sequins, feathers, head-dresses and yet more wings”.

The Evening Standard, 11/08/02 p.11
BBC News online 2002: www.bbc.co.uk
The Daily Telegraph, 26/08/02
The Daily Telegraph, 26/08/02
The Independent, 22/08/02
“Policing of Notting Hill Carnival cost £5.6m”, **The Guardian**, 01/06/02
Quoted in **BBC News** online http://news.bbc.co.uk

The design principles behind the costumes, the cultural-historic influences behind the themes, the year-long community activity it has taken to prepare for Carnival; are all neglected, glossed over, replaced with a vivid depiction of the event’s colourful ambiance. This, it could be argued, is good publicity for the Carnival: it is positive, unthreatening; it carries a warmth. But it also undermines the complexity of the event. The article continues:

> “Suzanne Oliver, 37, from Newbury, Berkshire, who works for a cancer trust, said: “This is the first time I’ve been and it’s brilliant. There are so many cultures mixing together. The colours are amazing” .

The Carnival is adorned with a gentle multiculturalism, based on the shallow integrity of a party.

This variegated and vibrant multicultural landscape perhaps provides the most common representation of the Notting Hill Carnival in 2002. It establishes the central focus for articles that are starting, perhaps nervously, to present the Carnival as a key symbol of a contemporary, multicultural Britain that is at ease with itself. Alternatively, in a year in which issues of race have filled swathes of newspaper pages and had ample air time, Carnival signifies a kind of multiculturalism that is possible, even (for some) desirable, but not yet the reality.

Central to this multicultural mainstreaming of Carnival was the performance of Carnival at the Queen’s Golden Jubilee weekend (and its subsequent media representation), which featured a parade of over 2,500 costumed individuals and a 100-strong steel band . This, plus the staging of the Carnival Gala at the Royal Opera House, were seized by many Carnivalists as key moments in the history of Carnival and thus in the history of British race relations. Indeed, the Carnival Trust was keen to highlight this new-found cultural importance of Carnival in its press releases and to present the Carnival itself as a continuation of the Jubilee celebrations.

The sight of Carnival dancing down the Mall is indeed a powerful moment in the history and iconography of the Notting Hill Carnival , a moment that is worth savouring, applauding. Yet it demands reflection. It presented an agreeable multiculturalism that is safe from the unpredictability of an unselected crowd to position Carnival as a vital symbol of contemporary Britain. Furthermore, it is almost a reverse parody of Carnival’s own traditional central parody: the playful lampooning of the ruling classes, with a particular emphasis on royalty. Carnival is thus legitimised and made acceptable, fleetingly rendered harmless and unthreatening.

The Observer reflects on this, presenting Carnival as “the largest celebration of Britain’s ethnic diversity” and suggesting that the “annual parade” might be permanently re-routed along this royal thoroughfare. This is considered as a practical solution to overcrowding in Notting Hill; which, significantly, is an area that no longer houses a large Black population. **The Observer** also points to the commercial appeal of such a move – with an event that is officially legitimate no doubt translating as an event in which organisations can invest. Carnival is judged in terms of its appropriateness for acceptance by a mainstream media that offers support conditional upon the performance of a specific cultural identity for a specific (largely White and conservative) audience/market.

Many media representations are keen to express the potential of Carnival to promote racial harmony, while this enthusiasm for a specific type of multiculturalism in fact highlights yet again the way Carnival (and how it is talked about, commented upon, read, and turned into a commodity) can tell us a lot more about **race relations** in contemporary London and Britain . It appears that if Carnival is to maximise its attractiveness to investors, it must focus meticulously on how it is organised and policed; and it must consider a physical and cultural re-routing into the mainstream. Political and cultural legitimisation of the event, coupled with an element of ‘bleaching’, are thus, it seems, essential precursors for economic investment.

The history of the Notting Hill Carnival is dominated by increasing official approval paralleled by a continued capacity to create unruly pleasure, political expression and unorthodox aesthetics. These paradoxes are perhaps what makes Carnival so important in terms of both what it offers and what it means. The majority of media coverage reduces these complexities to simple, accessible dualisms, such as an event that is in/out of control; that is Black/multicultural; that is exotic/sinister.

The Independent,26/08/02
The Independent, 26/08/02
The **Post Office’s** decision in 1998 to profile the Notting Hill Carnival on 4 stamps is a further sign that the Carnival has been ‘accepted’ as an important symbol of Britishness (see The Go Britannia Travel Guide www.britannia.com/panorama/lewis/stamp1.html for another example of how Carnival is presented as a playful, colourful party).
see for example http://www.rbkc.uk/NottingHill/PressArchive

These media messages must be contested. For example, the richness of Carnival does not lie in a kind of affable multiculturalism or in a deeply entrenched and essential 'Blackness'. It lies in its capacity to combine multicultural with historic art forms and meanings in innovative ways that establish the possibility of Carnival offering something for (almost) everybody. In this sense, it is important to remember that it is a 'Black' event, with a core aesthetic, but it is a lot of other things too. Correspondingly, an engagement with the multiple stories of Carnival might offer a more progressive corporate identity for the event and thus a more productive way of attracting sponsors and political/institutional support.

6.5 Carnival and contemporary British identity…

Patricia Alleyne-Dettmers (1997 pp.163-4) discusses Carnival in Notting Hill in these terms:

> "On the one hand Carnival is confronted with a discourse of dislocation, fragmentation and questions of belonging generated by continuous waves of migrations across a constantly compressed world, effected through sophisticated communication networks..." and on the other hand "these minorities need to use that displacement to create other versions of imagined communities, a **new sense of place**..." (Emphasis added).

Carnival is underpinned by cultural interchange involving White, Asian and a multiplicity of different ethnicities. Yet for most media, Carnival is progressive simply because it offers a colourful show of innocuous multiculturalism. However, there are examples where an attempt has been made to engage with the complexity and paradoxes of the event and its constituent processes. Such strategies of journalism have made sincere attempts to displace the harmful shorthand proffered by their colleagues and competitors.

See the coverage offered by **BLINK** for an example of how this was warmly received by a portion of the Black-led media: www.blink.org.uk

The Observer, 25/08/02

The Independent, 16/08/02

ALLEYNE-DETTMERS, P. T. (1997) ''Tribal Arts': a case study of global compression in the Notting Hill Carnival', in EADE, J. (ed.) **Living the global city: globalization as local process** (Routledge, London) pp.163-80.

The BBC, and particularly BBC London, has consistently delivered an engaging and educative coverage of Notting Hill Carnival (and operated as the Carnival's 'Official Broadcast Partner'). For example, a Children's BBC Newsround programme features a behind-the-scenes view of Glorious Backstage Arts, a mas camp based in Holloway. The contemporary significance of Carnival is affirmed, with an emphasis on how children from different cultural backgrounds are working together to create something collaborative and new; while the historical background of mas camps and Carnival aesthetics from Trinidad are also discussed. Carnival is thus presented as a progressive multicultural event and as an event with deep-rooted cultural traditions and historical integrity .

This particular feature is part of an ongoing attention to the multiple facets of Carnival. There are moments of reduction, where Carnival is reported as a news item and thus in terms of the absence or presence of disorder. However, these are rare and, significantly, placed in context alongside other features that focus on the Carnival in-depth. Features such as the 'Carnival Quiz' on the BBC London website , or the game where web-browsers are encouraged to make their own virtual Carnival costume , combine good fun with an attention to the cultural significance and depth of the event. These educative features are linked effectively to a Carnival information service, offering impressively detailed advice ranging from where to get your bus/tube to the best local eateries. A high quality virtual map on the BBC London website, plus a web-cam showcasing different sites within the Carnival landscape, also contribute to an expansive media coverage that provides a vital informational service while evoking a sense of the creative value and cultural significance of the event that progressively repositions Carnival within the British cultural landscape.

A similarly progressive coverage is provided by **Time Out London**, with an extremely detailed 82-page supplement. The focus, largely, is on Carnival's enormous significance for contemporary urban cultural forms – from garage music to particularly trendy, trans-cultural street fashions. Features range from an interview with Ms Dynamite (thus positioning Carnival as central to the creation of innovative new musical styles led by the biggest new talent), to an interview with Russell Henderson, who claims to be the first person to play steel pan at Notting Hill Carnival.

The guide offers a rich and detailed mapping of everything from the sound systems to the post-Carnival parties, combined with an honest interpretation of the histories and cultural influences of the contemporary

event. 'Laymans Guides' are presented, providing a background to the mas camp aesthetic (plus an attention to its contemporary significance for community-building); to steel pan; to the development of sound systems; and thus to the myriad of new inflections experimented upon and developed through Carnival in this distinctive London context.

An attentive reader of the supplement would be presented with an educative, enlightening and practical overview of the Notting Hill Carnival that positions the event as incredibly rich and as something that is and should be challenging. There is even an article that seeks to address a press that is "biased when it comes to reporting the truth about safety at Carnival". It might be argued that the supplement is overly enthusiastic about the new cultural forms showcased and experimented upon/with at Carnival; that it should focus on traditional elements of Carnival, rather than that which is perceived as sexy, cool and often not linked to Carnival for the rest of the year. However, **Time Out** does make an important intervention that can only broaden the appeal of Carnival (both to potential attendees and sponsors); does not undermine the cultural integrity of the event; keenly observes and commentates upon the event's capacity for cultural transformation and inclusivity; is realistic about safety issues; avoids the reductive currency of racialised stereotypes; yet never forgets that there is a politics to Carnival.

The Notting Hill Carnival is and always will be a political event. It is driven by a politics of Empire and oppression, translated into the racialised politics of contemporary London. As Gary Younge explained in a rare progressive intervention from a national newspaper, a focus must always remain on "(T)he politics of partying". Through a discussion with Clari Salandy of the Mahogany Mas Camp, even Carnival on the Mall is not rinsed of its politics:

> "Her favourite costume that day spoke the language of defiance: one person armed with several huge, multicultural shields defending his back."It's called Protector of our Heritage", she says. "It was there to defend Carnival".

Carnival cannot be de-politicised; neither can it be simplified. If it is to be a commodity, then its full complexity and therefore its cultural significance should be embraced. If the media are to engage with Carnival in a progressive way, they should not be encouraged to portray simplified, sanitised, officialised, even deracialised versions of the event. The focus – and this is the challenge – should be on articulating the cultural and economic importance of the event for Londoners/Britons and to London/Britain, without detracting from its inherent contradictoriness and its sometimes messy cultural politics.

Professor Chris Mullard, Chair of the Notting Hill Carnival Trust, seeks to position the Notting Hill Carnival as symbolic of and integral to the identities of contemporary London. It is not based upon an easy multiculturalism, but is an "expression of the joys, pain and desires of people from all walks of life trying to live together harmoniously". It has a cultural, political and economic importance rarely considered by the mainstream media. Chris Mullard asserts:

> "This is London: a global, multicultural city which should understand that its own multiculturalism is an inextricable part of its globalism, and that the Carnival needs London, just as London and the UK need the Carnival. To take part in Carnival…is to take part in the making of a truly global metropolis and the shaping of a new, dynamic, multicultural Britain."

If media representations of the Carnival can begin to engage with this dynamism and this challenging version of multiculturalism; then perhaps the Notting Hill Carnival will be valued not as a party with a murder scene, but as a product and process that underpins the very vitality of London and the UK.

see www.bbc.co.uk/cbbcnews/ for an archive of the feature

http://www.bbc.co.uk/london/carnival/quiz.shtml

www.bbc.co.uk/london/carnival/games4.shtml

Time Out London (21/08/02)

The Guardian, Weekend Supplement, 17/08/02

CONCLUSIONS

The Notting Hill Carnival is an important social and cultural event in the London calendar and a valuable component of London's image. It also has a major economic effect on the London economy, with an impact on incomes of £93 million in 2002 and a possible full-time equivalent impact on jobs of 3,000.

It is also clear from our surveys that the Carnival in 2002 was highly rated by participants for its atmosphere and for its organisation, and that it has significant positive impacts both for traders and for the Carnival groups themselves.

However, there are a number of broad areas where the research suggests the economic and social impact of Carnival could be improved. These include:

1) **Leveraging and co-ordination of public investment.**

2) **Leveraging of private investment and sponsorship.**

3) **Building on the skills and business development potential** of Carnival.

4) **Better management of the Carnival brand**, which would allow a greater amount of income to be drawn into the communities involved in the Carnival, and help positioning the Carnival as **a central symbol for London and Britain**.

The goals listed above could be achieved through the establishment of a solid partnership including key actors from the public, private and non-profit sectors. Public sector partners would comprise the LDA and bodies responsible for education, training, economic development, culture, tourism, city marketing, community relations and public transport, as well as High Commissions, Trade Commissions, Embassies and cultural institutes of relevant countries overseas. Private sector partners would include businesses in fields ranging from advertising, publishing, recorded music, fashion, design, broadcasting, film, newspapers, new media, the performing arts and other creative industries to tourism, retailing, hotel and catering and the manufacturing of food and craft objects.

Non-profit sector partners would include relevant organisations from the cultural sector in London and beyond, as well as other key organisations in other fields. This partnership would be important to develop and strengthen the ties between carnival and key institutions in London. One of the characteristics of successful events like Caribana in Toronto, the Mardi Gras in New Orleans and the Caribbean Carnival in Rotterdam is that they are firmly part of the civic agenda, and receive high levels of public and private support.

An important issue to consider here is the form of incorporation such a partnership could take. Given the wide range of stakeholder interests to account for, one interesting model to explore is the public interest company model recently proposed for foundation hospitals in the National Health Service.

There would also be much to gain for Notting Hill Carnival from **networking and collaborating** more systematically with organisations like Caribana in Toronto, Mardi Gras in New Orleans, the Summer Carnival in Rotterdam and West Indian Labour Day Parade in New York to encourage skills sharing, staff exchanges, placements and other exchanges of experience.

The Notting Hill Carnival partnership could develop specific strategies to address key issues highlighted by this research. These may include:

5) A robust **public awareness, PR, media, communication and advocacy** programme, with specific campaigns aimed at London, the South East, Britain, Europe and beyond (e.g., the Caribbean, North America and Japan). This programme of action might, for example, include the development of a strategy to present this report to the media, and a media relations programme aimed at ensuring that Carnival is not a cheap story, but is presented fairly, in all its complexity. The research suggests that particular attention should be paid to communicating fully the aesthetic/artistic excellence of the event, as well as its social and economic impacts.

6) A **fundraising** strategy, aimed at maximising revenue, capital and project funding from public sector sources, as well as private sector sponsorship, income from trusts and foundations, and from relevant public, private and non-profit sector organisations from abroad. The research highlights in particular the need for a regular calendar of fundraising events. Perhaps a group of "Carnival Champions", "Carnival Ambassadors" or "Friends of the Carnival" could even be considered. These would comprise influential figures from various walks of life, including politics, business and the arts, and they would help broker public and private financial support for Carnival. Better co-ordination between different Carnival funders should also be encouraged.

7) A **branding, marketing and merchandising** strategy aimed at improving marketing of the Carnival as part of London's offering to both residents and visitors. This could be produced by the Carnival Partnership. Advice could also be sought from experts also on the intellectual property aspects of the Carnival brand and how best to exploit them. For example, learning from similar events, the merchandising strategy could include the production and distribution of T-shirts, books on the history of the event, mugs, crafts objects, CDs and other goods. The feasibility of distributing Carnival products more extensively in mainstream retail outlets in London and elsewhere could be explored. The creation of a clearer and appropriately marketed Carnival brand would help drive both the adoption of more rigorous systems of quality control and the setting of standards for other aspects of the Carnival, such as the food and drinks stalls.

8) A mechanism for the **execution** of such a marketing strategy. The know-how required to develop and exploit the commercial opportunities available to Carnival is, in our view, quite different from the know-how required to stage the artistic production that is the essence of Carnival. Whether these two different kinds of knowledge can effectively be housed within the same organisation is a vital question, as it is clear that a high level of synergy between the two will be necessary in order to extract maximum value.

9) An imaginative **programming** strategy, which would link Carnival with a calendar of events in other parts of London and Britain, including exhibitions, performances, conferences, debates, markets and trade fairs, (which could act also as vehicles for the distribution of Carnival products), perhaps on a thematic basis, with themes changing each year. These activities could be programmed in collaboration with other Carnival cities in Europe and beyond.

10) A **training and skills/business development** strategy, which would review existing forms of business support and strengthen Carnival's links with the

CONCLUSIONS

creative industries. This strategy would involve identifying and addressing the strengths, weaknesses and needs of small businesses and other organisations linked with Carnival, in areas including management, marketing, legal and tax issues, intellectual property, health and safety and access to technology and finance. The aim would be to encourage the formation of new businesses and consolidate the existing ones.

11) A strategy to encourage a more systematic presence of carnival in the activities of **schools** in London and elsewhere, and in the **outreach and education** activities of relevant arts, media and sports organisations, businesses in all fields and youth agencies.

12) Lastly, the possibility of establishing a **Carnival Visitor Centre** should be considered, also by examining relevant experiences in the UK and abroad.

The use of appropriate **public consultation and participatory visioning processes** would be essential to confer credibility and legitimacy to all these strategies.

Further research may be required to underpin the formulation and implementation of these strategies. Certainly, our knowledge of the impacts of Carnival would benefit if it were to be included as a key element of future studies on tourism and on the creative industries in London. Some specific issues may also deserve further investigation and analysis:

1) A more in depth study of events comparable to the Carnival, and of the lessons that can be drawn from them.

2) Research on networks and collaborative relationships between Carnival groups, and on creative supply chains, to assist the further development of a coherent and identifiable Carnival industry.

3) Research on the social impact of the event, centred on variables including communication skills, community identity and pride, organisational capacity, social cohesion, intercultural understanding, developing self confidence and reducing social isolation.

This report represents a small, but important marker in time of a unique manifestation of a long established cultural and artistic tradition. The Notting Hill Carnival is recognised by the global Carnival community – and a good many others – as a special event; we hope that this work takes the process of cementing its future a step or two further.

The event has its own specific heritage, and it is our particular privilege through this report to draw attention to the work of those who make what we described as the 'in-kind economy' function – the singers, dancers, costumiers, and other players. At the same time, we hope that we have begun to map out a process that, in time, will establish an important legacy. In these pages we have focused on the economic dimension of that legacy; perhaps, in a decade or so, we will look back at those pictures of the Carnival procession down the Mall at Jubilee time and picture an even greater legacy – the power of community.

APPENDIX I

METHODOLOGY

Overview

The methodology adopted by the research team involved:

- A literature review focusing on the local economy, the cultural/arts/tourism/leisure sectors in London, economic impact studies of other carnivals and festivals (including international comparisons) with a particular focus on the critique of measures used including appropriate multipliers, the history of the Carnival itself.
- A survey of 944 visitors to the Carnival over the Carnival weekend. (This included surveying visitors to the "Pan-orama" event on the Saturday.) The survey was conducted by a Market Research Society registered company, CSR Survey Ltd, using as statistically robust a sampling methodology as possible in the context of the Carnival.
- A telephone survey of 65 "fixed" businesses in and around the Carnival area.
- A postal survey of licensed traders at the Carnival which had a response rate of 40 out of 250 mailed out, a reasonable response rate for a postal survey, particularly in light of the timetable required for completion of this study.
- Discussions with a number of stakeholders in the Carnival event including the Police, local authorities, past sponsors of the Carnival and those with established promotional stalls.
- In-depth semi-structured interviews with 12 "Carnival groups" that participated in the Carnival as performers.
- Desk research on selected comparable international festivals to identify best practice.
- A review of media representation of the Carnival and discussions around branding issues.

The questionnaires used are all available on request from the LDA.

Visitors

The sampling frame for the visitors' survey was all visitors. The method used was random sampling at a number of interview points around the Carnival area. These points were selected following discussions with those involved in organising previous Carnivals. Usual methods of interviewing attendees at events – exit interviews and interviewing every xth person – had to be adapted because of the nature of the Carnival event. The event takes place over a large number of hours and people come and go all the time and there is a lot of 'milling around'.

Interviewers were therefore instructed to speak to a variety of people they saw around them ensuring that they picked up a good mix of male and female, ages and ethnicity. The sampling error at the 95% confidence level is estimated at a possible plus or minus 3%.

Trained researchers undertook 944 interviews during the main weekend of the 2002 Notting Hill Carnival (Saturday 24 through Monday 26 August). Interviews took approximately 10 minutes and were held at different times throughout each day. Questions covered visitors' socio-economic background, where they had come from, mode of travel to the Carnival, spend on particular items, views on particular aspects of the Carnival and so on. Researchers were placed at key entry/exit locations around the Carnival but, as interviews were held throughout the day, and not only when people were leaving, many answers had an element of expectation in them rather than a statement of what interviewees had actually done.

Fixed business and traders

Three separate but inter-related strands of businesses were surveyed.

- Fixed Businesses – a 10-minute telephone survey of fixed businesses, which took place at least three weeks after the Carnival. In total, 65 fixed businesses were interviewed – 42 (65%) open during Carnival weekend, 23 (35%) closed.
- Licensed Traders/Stalls – 40 of licensed traders responded to the questionnaire out of 250 – a response rate of 16%.

Fixed Businesses

The sampling frame was a list of businesses developed by 'walking the street' and noting down business names, supported by use of local phone books and so on. This produced a more robust list of businesses than those obtainable via other sources such as local councils or business contact databases. (The latter tend to be weak in recording small retail and catering businesses). The sampling method was random sampling from this list, by telephone, allowing estimates to be made of businesses that were closed over the weekend as well as reasonably robust estimates for other variables. As the numbers interviewed were significantly lower, the sampling error was larger than for the visitors' survey. The sampling error at the 95% confidence level was therefore plus or minus 12%.

Traders

The sampling frame for this survey was lists obtained from the two councils providing licences for traders at the event. This was a postal survey with an incentive to enter a prize draw for all those who returned the form. It was therefore self-selection rather than a random sampling method. The sampling error at the 95% confidence level was plus or minus 14%.

Creatives

This part of the Economic Impact Assessment of the Notting Hill Carnival was based upon a series of qualitative interviews with Carnival practitioners.

Interviewees were identified through the Soca News web site (www.socanews.com), where participating mas bands, steel bands and sound systems are listed, and through the Notting Hill Carnival Trust. Interviewees were then selected, with the intention to interview a range of differently-sized mas bands and at least one steel band. The aim was not to interview as many people as possible nor talk to a 'representative cross-section' of Carnivalists; rather, interviews were applied strategically, used selectively and conducted as frequently as was deemed 'necessary' and 'practical' to satisfy the aims and urges of a developing research process. Moreover, interviews were not structured with the procedural rigour of a questionnaire or a 'structured interview', but were relatively unstructured, 'informal', caught unpredictably in the flow of conversation in order to capture the unforeseeable and uncover the hidden.

APPENDIX I

The three Carnival discourses in Chapter 6

This chapter of the report is based on a short 'mapping exercise', analyzing a range of newspaper and magazine articles that focus on the Notting Hill Carnival 2002. Little research was conducted into television and radio representations of Carnival, which is a shortcoming of this research. Articles were sourced, read and re-read through a form of 'discourse analysis'. Drawing on the work of Wetherell and Potter (1992) , interviews were coded through the identification of an 'interpretative repertoire' of "discernible clusters of terms, descriptions and figures of speech often assembled around metaphors or vivid images" (ibid p.90). The emphasis here is on identifying any kinds of discursive patterns, focusing in detail on those patterns which are most conspicuous, and situating these within the contexts of their practical performance (the cultural political context of Notting Hill Carnival).

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APPENDIX II

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