MARSEILLE-PROVENCE 2013
EUROPEAN CAPITAL
OF CULTURE

MP2013 IMPACT ASSESSMENT

MP2013 ASSOCIATION / EURÉVAL / CCI MARSEILLE PROVENCE / BOUCHES-DU-RHÔNE TOURISME

Marseille-Provence 2013: A look back at an extraordinary year

Preface by Jacques Pfister, president of the Chamber of Commerce and Industry for Marseille and Provence and president of the MP2013 Association, European Capital of Culture.

What you hold between your hands may appear to be a dry official report, but in fact it is a vibrant account of a veritable saga: the story of how over the past 10 years, the Bouches-du-Rhône territory mobilised itself and produced a once-in-a-lifetime cultural event. A cultural event that was powerful and original, that was founded upon the deep desire to give the world a new vision of Marseille and its metropolitan area.

From the very first day, this project was built on the idea of transparency. All the doubts, all the polemics, were an integral part of a process where diverging opinions regarding the process often led to profound solidarity when it came time for action.

The association's administrative council and I always insisted that an independent evaluation of the project should be conducted. We created an evaluation committee within the association that quickly recruited a group of impact assessment experts by drawing upon the resources of both the private and the public sectors. After a call for offers, an impact assessment consultancy was chosen. The final published report is the result of an impact assessment that was conducted with neither compromise nor false praise.

It is a good measure of the strength of this project that such a critical and constructive approach was used to evaluate the formidable spirit of MP2013. This report will, I hope, help clarify the future and lay the groundwork for fresh analysis by researchers and public policy leaders.

Along with the report itself, we felt it was important to provide the factual basis for its conclusions in the form of annexes, notably concerning the emblematic construction projects, the economic impact of the event, and the statistics from the tourism sector.

But this abundance of data shouldn't obscure the essence of the report. It is helpful to remember that by submitting our candidacy to the European Union in 2007, an initiative that was coordinated by Bernard Latarjet, our dream was to create a major European event that facilitated both creative mobility and intercultural dialogue. The project was underpinned by something of a geopolitical wager on both European culture and what we like to call 'the openness of the south', on the idea that we could use major investments in cultural infrastructure as an engine for both economic and cultural development, and on the possibility that we could help Marseille take its rightful place among the 20 foremost metropolises of Europe.

Once we've seen the numbers that clearly show the popular embrace of the programme and the spectacular appeal of our territory, once we've absorbed these various numbers and indicators of satisfaction, then it is time to seize the moment and devote ourselves to the next great projects that will define our future.

Jacques PFISTER

ACKNOWLEDGEMENTS

This assessment process owes a great deal to the members of the evaluation committee, whose spokesperson is Florian Salazar-Martin, deputy mayor of the city of Martigues. He relied upon the expertise of the other members of the resource group: Magali Bencivenga, Jean-Pierre Perrin, Maud Favre, Aude Eisinger, Fabienne Evans, Thierry Delafontaine, Anne Peron.

Within the MP2013 association, the process was launched by Isabelle Coustet and successfully shepherded to completion by Bertrand Collette and Jean-François Chougnet. Finally, it would be remiss to not thank the Euréval consultancy led by Virginie Besrest and Thomas Delahais.

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July 2014 / Euréval

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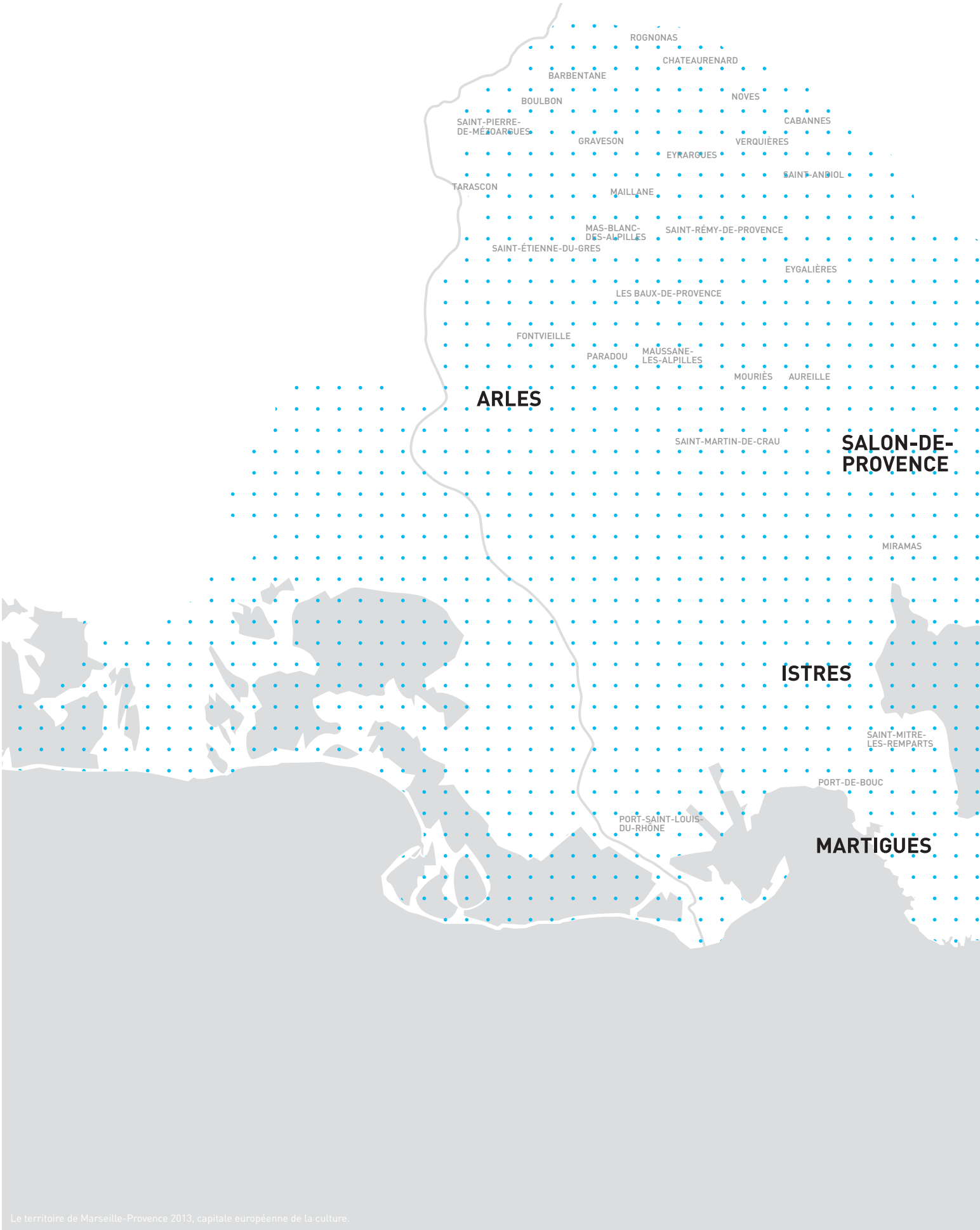


Le territoire de Marseille-Provence 2013, capitale européenne de la culture.

LA ROQUE-D'ANTHERON
SAINT-ESTÈVE-JANSON
PERTUIS
SAINT-PAUL-LÈS-DURANCE
JOUQUES
ROGNES
LAMBESC
LE PUY-SAINTE-RÉPARADE
PEYROLLES-EN-PROVENCE
MEYRARGUES
SAINT-CANNAT
VENELLES
ÉGUILLES
SAINT-MARC-JAUMEGARDE
AIX-EN-PROVENCE
VAUVENARGUES
COUDOUX
PUYLOUBIER
BEAURECUEIL
VENTABREN
LE THOLONET
SAINT-ANTONIN-SUR-BAYON
MEYREUIL
CHATEAUNEUF-LE-ROUGE
ROUSSET
FUVEAU
GARDANNE
VITROLLES
CABRIÈS
BOUC-BEL-AIR
PEYNIER
TRETS
MIMET
BELCODÈNE
SAINT-VICTORET
SIMIANE-COLLONGUE
SAINT-SAVOURNIN
MARIGNANE
LES PENNES-MIRABEAU
CADOLIVE
LA BOUILLADISSE
GIGNAC-LA-NERTHE
SEPTÈMES-LES-VALLONS
PEYPIN
CHATEAUNEUF-LES-MARTIGUES
PLAN-DE-CUQUES
LA DESTROUSSE
SAINT-ZACHARIE
AURIOL
LE ROVE
ENSUÈS-LA-REDONNE
ALLAUCH
ROQUEVAIRE
CARRY-LE-ROUET
SAUSSET-LES-PINS
AUBAGNE
GÉMENOS
LA PENNE-SUR-HUVEAUNE
CUGES-LES-PINS
MARSEILLE
CARNOUX-EN-PROVENCE
ROQUEFORT-LA-BÉDOULE
CASSIS
CEYRESTE
LA CIOTAT

Impact Assessment for Marseille-Provence 2013, European Capital of Culture

JULY 2014 / EUREVAL

Introduction

MARSEILLE-PROVENCE 2013, EUROPEAN CAPITAL OF CULTURE

The European Capital of Culture designation

The European Capital of Culture (ECC) designation was first created in 1985 by the member states of the European Union, then the programme was re-initiated by the European Union in 1999. Thus far, the designation has been accorded to more than 40 cities based on their programme for a year of cultural events that has the objective of "emphasizing the richness, diversity, and common traits of European cultures and improving the mutual comprehension between European citizens"[1]. This general objective would eventually incorporate other goals that varied depending on the context and ambition of the designated cities, such as the "development of cultural activities", the "use of culture to promote of the European dimension of culture", and the "the use of culture for economic and social development".

In 2006, the selection process for ECC hosts was enhanced, with a new set of rules put in place for candidate cities starting with those vying for the designation of the 2013 capital of the year. The process then included multiple phases: an evaluation by a panel of European experts, a recommendation from the European Commission, and the attribution of the title by the European Union's Council of Ministers. This process of preparation and selection began six years before the date of the event.

In September 2008, the panel of experts designated Marseille and Provence as the European Capital of Culture for 2013 in parallel with the city of Košice in Slovakia, a decision that was formalised by the Council in May 2009. Marseille-Provence 2013 (MP2013) presented a Euro-Mediterranean project to be carried out across a vast territory, a decision that took into account "the mobility of audiences and their existing cultural habits and the complementary nature of the cultural offerings"[2].

The objectives of Marseille-Provence 2013

Marseille-Provence 2013, European Capital of Culture had the following specific objectives:

1. Support the creation and diffusion of ambitious cultural work by collaborating with artists from European and Mediterranean countries.

2. Highlight the cultural and artistic potential of the capital region and contribute to its long-term growth and international reputation.

3. Innovate new ways to integrate art into public spaces and into the relationship between culture and society.

4. Involve the residents of the Marseille-Provence 2013 region by using both a participative approach and by providing preferred access to events.

5. Create an exemplary form of collective management for the Marseille-Provence 2013 project

6. Significantly increase the level of tourism in 2013 across the concerned territory and contribute to long-term gains in the territory's tourism industry.

7. Bestow the territory with an international, creative, and welcoming image.

[1] Article 151 of the Maastricht Treaty and the May 25, 1999 decision of the European Parliament and the Council of the European Union.

[2] See the complete candidacy dossier at the site of the Marseille-Provence 2013 association: http://www.mp2013.fr/pro/professional-area/press-and-publications/bid-file/?lang=en

SUMMARY OF ASSESSMENT OBJECTIVES

The current impact assessment

In its candidacy, Marseille-Provence 2013 committed itself to assessing the impact of the event within the guidelines applied by European institutions. These assessment guidelines were laid out in the Palmer Report (2004)[3] and were recently enhanced as part of the plan to share expertise among the different European capitals of culture[4].

Conforming to these enhanced guidelines, Marseille-Provence 2013 and its partners committed to an assessment process that was approved by its administrative council: a working group was put in place on 31 May 2010, which was then succeeded by an evaluation committee on 23 November 2011 that was composed of representatives of the association's financial partners, involved parties, and experts in the field. During a meeting on 23 February, 2012, the evaluation committee defined the following measures of assessment which were then approved by Marseille-Provence 2013's administrative council during a meeting on 19 March 2012:

→ Two assessment questions:
In what ways did MP2013 induce changes in the practices of the territory's cultural actors?
In what ways did MP2013 influence the image and appeal of the territory?

→ And one methodological question:
How can the social impact of the MP2013 be evaluated, notably in regards to participation and access to culture?

The role of the current assessment is thus to analyse the added value of the European Capital of Culture project and to assess the global and individual impacts of such a collective cultural project.

Other works

A series of other analyses and evaluations were carried out in parallel in order to measure other aspects and ambitions of the European Capital of Culture. Among the notable efforts:

→ The *Evaluation Report of European Capitals of Culture* which is commissioned each year by the European Commission and assesses whether goals were met and is notably based on the assessment reports commissioned by the capitals themselves.

→ The French study *Marseille-Provence 2013 : leçons d'une expérience* (*Marseille-Provence 2013: Lessons from an Experiment*), which was conducted by management students from INET (Institut National des Etudes Territoriale).

→ The French study "*Publics et pratiques culturelles* (*Cultural Audiences and Practices*)" that was organised by Sylvia Girel, a researcher from Aix-Marseille Université.

→ The French study "*Marseille-Provence 2013 : analyse des grands évènements en espace public* (*Marseille-Provence 2013: An Analysis of the Major Events in Public Spaces*)" conducted by AGAM (Agence d'Urbanisme de l'Agglomération Marseillaise), the urban planning agency in the Marseille area.

All of these reports will be available on the MP2013 site as soon as they are published.

[3] The Palmer Report is a study of cities that hosted the ECC between 1995 and 2004 that was commissioned by the European Commission. It is available at the following site: http://ec.europa.eu/culture/tools/actions/documents/ecoc/cap-part1_en.pdf

[4] The report from the European policy group can be seen at: http://ecocpolicygroup.wordpress.com/members/

METHODOLOGY

Within the framework of the procedures for public contracts[5], the Euréval group, specialists in public policy assessment, was selected to lead the current impact assessment. The group also retained the consultant James Rampton, who has conducted assessments of European Capitals of Culture since 2009 on behalf of the European Commission, and the services of the *Occurrence group*, a consultancy specialised in communication.
This assessment began in December 2012 and was concluded in July 2014.

The preliminary period led to **the first two questions regarding the assessment to be divided into 11 sub-questions that form the structure of the current report**. For each of these sub-questions, a certain number of criteria were formulated ("For the European Capital of Culture to have been a success, there must have been …") which went on to guide the investigation and the analysis.

The **third question**, which was of a more methodological nature, was the subject of a **separate report** whose final version was delivered in October 2013.

The data collection was conducted in two phases:

→ A first phase ("upstream") took place from the end of 2012 to June 2013 and aimed to answer the question of the social impacts and to establish the expectations of the ECC prior to its launch, that is to say: the opinions and expectations of the involved parties, the initial impacts connected to event preparations, possible hypotheses that could be tested at the end of the year. This phase resulted in the publication of an intermediary report that is available in the appendixes;

→ The second phase ("downstream") took place from December 2013 to June 2014 and concentrated on the outcomes of the year based on collected data and the abundant documentation available, and then comparing these outcomes to the expectations set out in the first phase.

The team used the following tools during the assessment process. **Beyond relying just on documentation, these tools allowed the perspectives of more than 1,500 involved parties to be considered:**

→ analysis of more than 150 documents: newspaper articles, reports, studies, research, etc.;

→ a consultant's report produced by James Rampton that considered the potential impacts of ECCs;

→ two group meetings with key personnel from the territory to discuss the social impacts (14 people);

→ two series of individual interviews with individuals from the cultural, economic, public, and social institutions of the territory, one held during the upstream phase, the other during the downstream phase (53 people);

→ two on-site observation periods, conducted during the opening ceremony for the ECC and the opening of the MuCEM;

→ two digital surveys carried out with the business category known as 'TPE/PME', the French classification for very small businesses and small- and medium-sized businesses (530 respondents during the 1st phase, 263 during the 2nd phase);

→ two focus groups with management teams from major companies, one during the upstream phase, one during the downstream phase (10 people);

→ one digital survey was conducted during the downstream phase of cultural actors who were co-financed during the ECC (75 actors responded accounting for 100 projects) and actors who didn't receive financing but were branded as being part of the ECC (59 actors responded accounting for 80 projects)[6];

→ one digital survey of 506 residents of Marseille and the Bouches-du-Rhône which was conducted in January 2014;

→ an analysis of media coverage conducted by Occurrence that evaluated a sample of 403 news items that appeared between January 2012 and January 2014.

A summary of each of these tools is available in the appendix. They form the foundation of the analysis carried out in this assessment.

[5] The contract for this work was open for bidding through Marseille-Provence 2013 and the sites www.marchesonline.com and www.achatpublic.com

[6] The survey was sent to 180 organisations representing 320 co-financed projects (email addresses available, not including projects produced by MP2013 and the Ateliers de l'Euroméditerranée). 75 organisations at least partially responded to the survey accounting for 100 projects, resulting in a response rate of 41% of organisations and 31% of projects. For branded events, the survey was sent to 485 contacts involved in 382 projects (email addresses available). 59 organisations with a total of 373 different organisations. 59 organisations at least partially responded to the survey accounting for 80 projects, resulting in a response rate of 15% for organisations and 21% for projects.

DEALING WITH THE QUESTION OF CAUSALITY

The goal of this assessment is to determine the role played by the European Capital of Culture in the practices of cultural actors in the territory and the administration, image, and appeal of the territory. Of course, among so many deep and systemic changes in the territory in recent years, the ECC could only be one factor among many.

As a result, our approach was as follows:

→ for each of the two initial impact questions, we created a theory of how change would occur, that is to say a model showing step-by-step how the ECC might contribute to the expected changes. We then aimed to collect information for each of these steps (the theories of change are available later in the report);

→ we also thoroughly explained the mechanisms by which Marseille-Provence 2013 was apt to make its impacts. These mechanisms were systematically studied to confirm the effects of the ECC (see Inset p.14);

→ finally, we produced this report, which systematically identifies changes ("What happened? Did the observed changes conform to expectations?") and the factors that can explain these changes ("In what way did the ECC contribute to these changes? What were the other decisive factors?").

PRINCIPAL LIMITATIONS

The following principal limitations could be mentioned:

→ the impact assessment, despite being properly launched in the upstream phase, was not immediately integrated into the project; as a result, we were not able to take full advantage of the data from MP2013 so in this report we are relying both on data from the association and, in a small part, from the students of INET;

→ the individuals interviewed, as wells as the documents consulted, spoke more often about Marseille than the rest of the territory. As a result, the final analysis relies on less thorough data from the other concerned cities;

→ in 2014, the requests for information were met with a certain lassitude by individuals who had been continuously solicited during 2013, which resulted in a low response rate. This was especially obvious in connection with the follow-up survey of businesses carried out in 2014; it was also the case when those who managed cultural projects were contacted in 2014.

THE MECHANISMS OF IMPACT

The impact of the European Capital of Culture was mainly made in the following manners:

• the direct intervention of the MP2013 association or the association's financers via the association in the various areas in which the association worked: planning the year, creating the programme, managing projects, or acting as a liaison between various organisations, financial groups, etc.;

• the projects financed by or branded by MP2013. In these cases, the impact of the ECC has the potential to be the greatest when the project was made possible by MP2013 (and wouldn't have taken place otherwise); the impact would be reduced if a project financed by MP2013 might have found similar financing elsewhere; and the weakest when the project existed already and was only branded by MP2013 (thus not financed) for only the year 2013;

• the types of projects that MP2013 gave preference to. This is particularly true for questions of accessibility to culture (the holding of events in public spaces, for example) or the involvement of local residents in projects. The contribution is the greatest when the organisations running the projects didn't embrace such approaches prior to the intervention of MP2013;

• the dynamic inspired by MP2013 within the involved parties or within broader cultural, economic, and social activities. The term dynamic signifies both the way organisations or people became more involved in cultural activities than they otherwise would have been and those moments when projects had greater visibility and audiences were more inclined to attend cultural events. In this case, the greatest impact can be said to take place when involved parties partake in exceptional behaviour compared to their normal habits (for example: the massive presence of people in the streets for the opening ceremony or the ability to draw people to places they usually don't visit for a special event);

• the cultural infrastructure and facilities that were put in place for MP2013 and their effects on both local cultural actors and the people and regions where they are located. No single facility (except for the use of the J1 hangar) was the unique result of MP2013, but it can be said that MP2013's contribution was perhaps the most important because the European Capital of Culture acted as a catalyst for certain projects and accelerated the creation of others that had already been conceived and were in progress.

Q1: In what ways did MP2013 induce changes in the practices of the territory's cultural actors?

In this section, we will answer the following four questions:

→ Did all cultural actors, particularly local ones, have access to MP2013?

→ Did local cultural actors improve their practices thanks to MP2013?

→ Were cultural actors successful in attracting larger and more diverse audiences as a result of MP2013?

→ Were the practices of local cultural actors changed for the long term?

We have defined **cultural actors** here as the ensemble of individuals and organisations where at least a part of their activity involves the financing, conception, or production of cultural events, cultural mediation, or cultural performance, and that these actions can be directed toward the public (live shows, exhibitions, cinema, etc.) or not (artist residencies, exchange programmes, seminars, etc.). **Cultural operators** are the structures that create projects or programmes of a cultural nature but which are financed by another structure such as a local government or municipality.

The logic model on the following page was created with the resource group. It presents a synthesis of the ways that the ECC might possibly make an impact in terms of changing the practices of cultural actors before, during, and after the year.

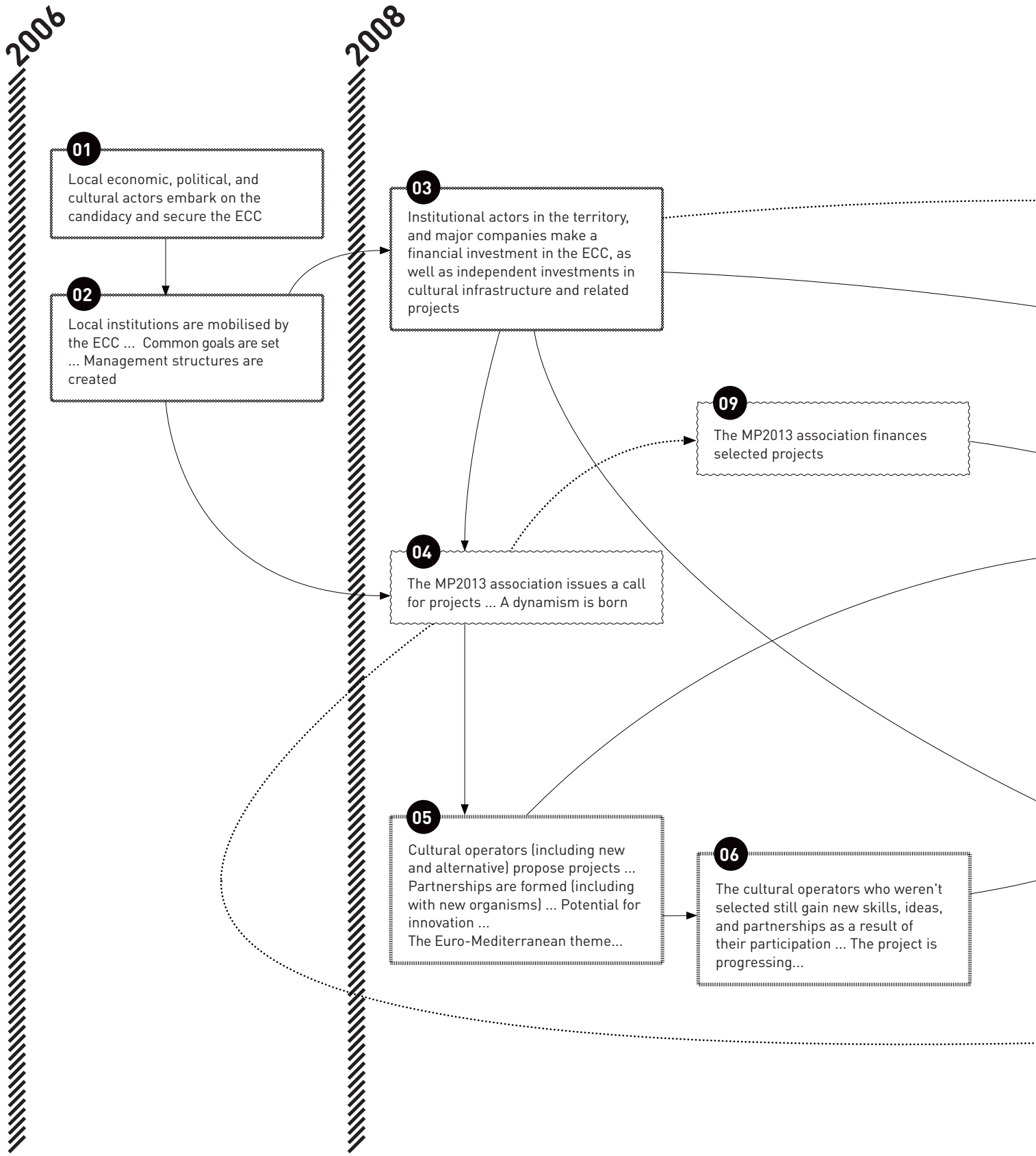
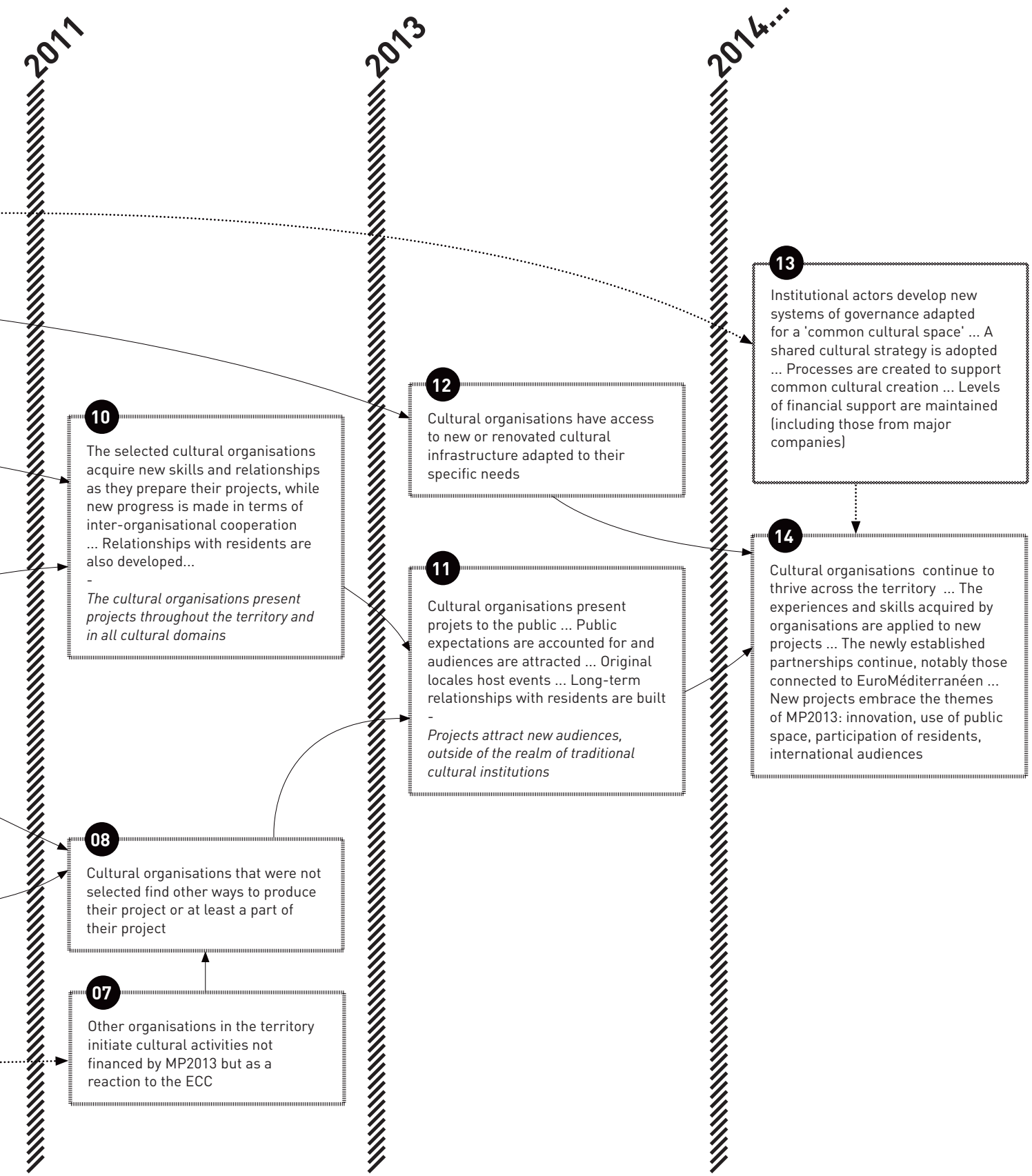


Figure 1: Logic model showing the ways the ECC might possibly make an impact on cultural actors


2011
2013
2014...
13
Institutional actors develop new systems of governance adapted for a 'common cultural space' ... A shared cultural strategy is adopted ... Processes are created to support common cultural creation ... Levels of financial support are maintained (including those from major companies)
12
Cultural organisations have access to new or renovated cultural infrastructure adapted to their specific needs
10
The selected cultural organisations acquire new skills and relationships as they prepare their projects, while new progress is made in terms of inter-organisational cooperation ... Relationships with residents are also developed...
-
The cultural organisations present projects throughout the territory and in all cultural domains
11
Cultural organisations present projets to the public ... Public expectations are accounted for and audiences are attracted ... Original locales host events ... Long-term relationships with residents are built
-
Projects attract new audiences, outside of the realm of traditional cultural institutions
14
Cultural organisations continue to thrive across the territory ... The experiences and skills acquired by organisations are applied to new projects ... The newly established partnerships continue, notably those connected to EuroMéditerranéen ... New projects embrace the themes of MP2013: innovation, use of public space, participation of residents, international audiences
08
Cultural organisations that were not selected find other ways to produce their project or at least a part of their project
07
Other organisations in the territory initiate cultural activities not financed by MP2013 but as a reaction to the ECC

DID ALL THE CULTURAL ACTORS, PARTICULARLY LOCAL, HAVE ACCESS TO MP2013?

The participation of cultural actors in Marseille-Provence 2013 varied depending on the phase, from the candidacy to the call for projects to the year itself. After having presented the principal characteristics of the cultural actors, this section will review the various stages of the process and then provide a report on how the cultural actors participated in the EEC.

What happened

The territory's cultural actors

There are numerous cultural actors in the region of Marseille-Provence 2013. According to the local cultural agency ARCADE (Agence des arts du spectacle de Provence-Alpes-Côte d'Azur), in 2012 there were slightly more than 2 101 cultural actors located within the perimeter of the MP2013 territory which relied on the support of 24 different municipalities of more than 10,000 people, 7 inter-communal organisations, and the departmental, regional, and national governments[7]. This number has been stable or increased slightly over the years[8], and it includes the majority of semi-professional and professional structures in the region but not the amateur groups that may or may not receive financing from their local governments, nor the cultural actors who receive their financing wholly from the private sector.

The vast majority of these structures were of a small size. Using grants as an indicator, 80 per cent of structures received less than 10 000€ in public financing (which isn't sufficient, for example, to provide for even one full-time employee) and a little less than 3% of these structures (65 in total) received more than 1 million euros in public aid. The biggest organizations were concentrated in the cities, and among these cities, most specifically in major urban centres such as Marseille:

Culture, more so than any other sector, thrives in concentrated areas, so it is not surprising to find the principal cultural infrastructure within a major metropolis [...] At the same time, in an unexpected fashion, we can see other, more working-class neighbourhoods, notably in the 3rd arrondissement, also feature extensive cultural infrastructure [...] The southern neighbourhoods, bourgeois and residential, remained well-served [...]. On the other hand, the outlying neighbourhoods [to the east of Marseille] are very poorly equiped [...] Finally, the infamous northern neighbourhoods, [...], of which much is said, most of it bad, actually receive better service than imagined[9].

The MP2013 territory also features a number of cultural organisations and events of a regional, national, or international scale, to which were added those new structures developed within the framework of the ECC. This is a result of national cultural policy (national choreography centres, national theatres), long-term commitments from private operators (the leading publisher Actes Sud is based in Arles, for example) and from the engagements of local governments who are both the leading financers of culture in the region and the leading structures in terms of direct cultural management.

The cultural subsidies are divided across many disciplines. Live performances (especially music) are the leading recipient in the MP2013 territory (142 M€ out of 377 M€, or 38% of all funds), followed by multidisciplinary projects, publishing, the museum system (between 10% and 13%), visual arts, and architecture (roughly 5%).

The stages of the ECC

Candidature of Marseille — The City of Marseille launched its candidacy to host the EEC on 9 March 2004. Between this date and the designation of Marseille Provence as capital by the French jury on 16 September 2008 and by the European Council on 12 May 2009, the local cultural actors were consulted and mobilized on multiple occasions:

→ In September 2005, the city of Marseille ordered a study from cultural consultants who drew on input from more than 100 local cultural actors to devise possible themes for

[7] Source : The French book 'Financements publics de la culture', 2012 edition, 'Monographie de territoires : Territoire Marseille-Provence 2013', p.11.

[8] A similar study by Arcade conducted in 2008 identified 2 101 structures in the Bouches-du-Rhône (French report 'Financements publics de la culture en PACA', 2008, p.121). We are unsure whether this change is linked to a more thorough report, a greater number of organisations receiving public financing, or a growth in the overall number of cultural structures.

[9] Source: French document "Marseille-Provence 2013, analyse multiscalaire d'une Capitale européenne de la culture", Boris Grésillon, Géoconfluences, 4 November 2013.

the ECC. This was also an opportunity for the city to make first contact with the cultural actors and bring them up to speed on the project.

→ In 2007 and 2008, the institutional actors created working committees to consider multiple themes and to lead further reflection on the European Capital of Culture.

→ Cultural actors were also mobilized in support of the project, in particular for the presentation of the project in Brussels and to welcome the European Commission delegation to the region. Also, the directors of the *Festival international d'Art lyrique d'Aix*, the renowned opera and music festival, provided the candidacy with a high level of support using the festival's connections in Brussels[10]. The arts group *Lieux Publics*, a national centre of creation based in Marseille, used its network to encourage the director of the Metropolis artist festival in Copenhagen to support the project. Finally, in 2008, the jury met with cultural actors from the region who were committed to the project in sessions held at both the Friche Belle de Mai, an artist complex in central Marseille, and the Cité des Arts de la Rue, a complex in Marseille devoted to supporting international street arts. This way, the jury could observe the work that had already been started by several cultural organisations, such as *FRONTIÈRES dedans/dehors* (Borders, Inside/Outside) project put in place by *Lieux fictifs*[11] at the Prison des Baumettes to open a dialogue between art, prison, and society. These meeting were fundamental to the choice of Marseille as ECC.

Selection of projects — The Marseille-Provence 2013 association, which was created in December 2006, began the selection process for projects using three parallel procedures:

→ directly working with cultural actors to develop projects between 2009 and 2012, sometimes even providing preliminary financial aid for projects needing extensive development, such as with the launch of *Quartiers créatifs* (the Creative Urban Projects artistic residency initiative);

→ a general call for projects that was opened in 2010;

→ producing and managing specific MP2013 projects such as *Ateliers de l'Euroméditerranée*, the programme where major local companies hosted artists for the ECC.

This process for creating the programme was chosen by MP2013, as each ECC develops its own system that may or may not include a general call for projects. In any case, it was the call for projects that generated the most interest with roughly 2 500 proposals being submitted. The majority of projects were proposed by cultural organisations based in the territory although in some cases there was collaboration with organisations or artists from outside the region, most notably from the Mediterranean basin (see below). The biggest actors (local governments, major cultural organisations) often proposed multiple projects. According to our research regarding the project administration, half of the organisations proposed more than one project and 20% more than three projects[12].

This massive number of submissions provoked a heavy bottleneck. Almost one year after the opening of the call for projects, 500 notices of refusal were sent and roughly 400 projects were selected[13]. Certain candidates were re-contacted with an offer to be branded as part of MP2013 (included in the programme but with no financial support) or asked to participate in larger projects such as *Cirque en capitales* (Circus in Capitals). Others never received a formal response.

The end of 2011 was an awkward period for the project and many cultural organisations revealed their bitterness with the way MP2013 was being operated[14]. Local governments and prominent figures also publicly criticised the event. In particular, they protested against the "omnipresence of what could be considered an elitist culture" or denounced the use of "culture as a tool to restructure the region for the benefit of the economic powers[15]."

In 2012, the association contacted a certain number of additional project administrators and offered them the label "Marseille-Provence 2013" with no financial contribution. Many accepted, a minority refused according to the association.

The creation of new structures – New infrastructure dedicated to culture was created or relaunched as part of the ECC. Notable among the new or renovated infrastructure was MuCEM, the Villa Méditerranée, Regards de Provence, the Théâtre Eden in La Ciotat, the Musée des Arts décoratifs, the Musée de la Faïence, and the Musée de la Mode. As for the Musée des Beaux-Arts in Marseille, it had closed for renovation in 2013 and was reopened in 2013.

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[10] In 1996, Brussells asked the festival's director, Bernard Foccroule, to begin laying the groundwork for the ECC BXL 2000. Source: The a.s.b.l. archives. Bruxelles 2000 http://www.bruxelles.be/artdet.cfm/4475

[11] http://www.lieuxfictifs.org/Presentation/

[12] 41% of the organisations that proposed more than one project ultimately abandoned at least one of their projects. Others were produced without co-financing, some being branded projects (41%) and other not (28%). Source: poll of project organisers.

[13] 2011 Activity Report from the Marseille Provence 2013 association.

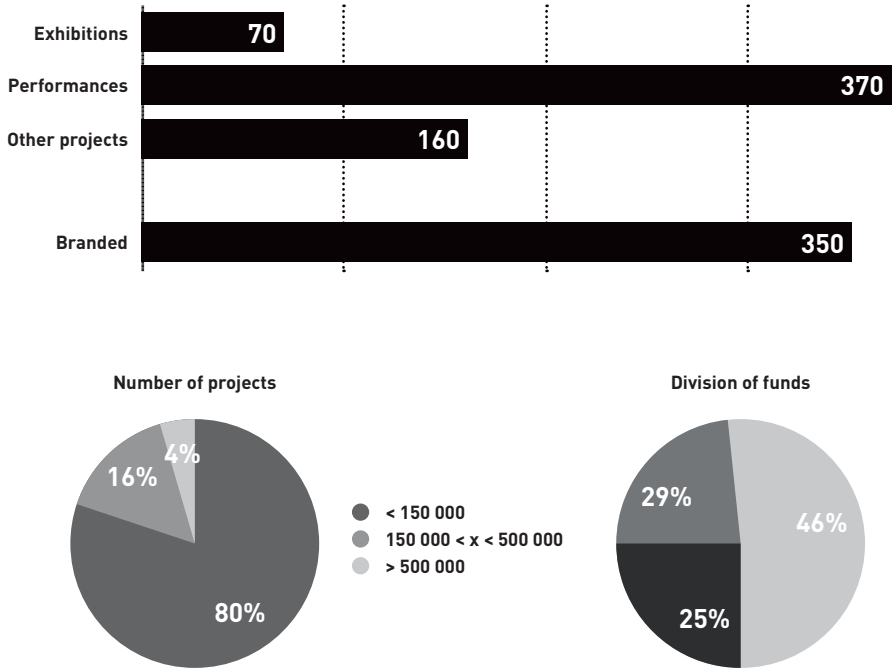
[14] See the statements that appeared in the newspaper Le Ravi, article in French: "2013, la capitale désenchantée", http://www.leravi.org/spip.php?article1210

[15] Source: French article "Le collectif Le Fric s'attaque à Marseille 2013, Capitale européenne de la culture", Les Inrockuptibles, 9 January 2013.

Certain infrastructure also underwent important expansions, among them the Musée d'histoire in Marseille and the Musée départemental Arles antique.

Overview of participating organisations

Figure 2: Number of projects by type and budget (source: MP2013)



The accepted proposals — According to the MP2013 association, "the programme that was produced and co-produced by the association, which had begun development in the previous years, involved 70 exhibitions and 370 live arts events or major public events. [...] In total, close to 600 projects were completely or partially financed. [...] Projects where MP2013's financial contribution was less than 150,000 euros represented a little more than 80% of the total number of projects and accounted for a quarter of all spending destined for projects, while the projects where the financing was more than 500 000 euros represented 4.2% of the total number of projects [18 projects] and 45.6% of the total budget for projects[16]."
Also of note, roughly 350 projects were officially branded as 'Marseille-Provence 2013'.

More than 90% of cultural actors involved in both the branded projects and the financed or co-financed projects were in or based near the region (the neighbouring departments of Hérault or Var, for example). However, these actors can be classified in different ways

→ Among the 362 cultural actors involved in co-financed projects[17], a little more than 80% were either individual artists or cultural organisations (of which 15% were structures, notably theatres and museums) and a little less than 10% were public or quasi-public (mostly local governments[18]). Among the remaining 10% there can be found educational institutions or universities, businesses, and social service agencies.

→ More than 95% of the 393 branded projects[19] involved local cultural actors or cultural actors with offices in the territory. Here, the number of cultural organisations is proportionally smaller but it still represents more than half of all actors, with a significant component of independent artists as well as numerous arts companies and cultural facilities; public and quasi-public institutions (including cultural organisations directly managed by governments) account for roughly 25% of this category of project, and associations (excluding cultural associations) roughly 10%. Among the other structures are businesses, unions, or private educational institutions.

Less than 1% of the projects were cancelled or abandoned, for example, due to the withdrawal of the participating association as was the case with *Jardins possibles*, a project that was planned within the context of the *Quartiers créatifs*, or for other reasons

WHAT IS A PROJECT?

The number of projects that were either financed by MP2013 or branded by the association is not easy to calculate and depends on the precise lines drawn between projects, which is why different statistics have circulated. For example, more than 2 000 events with a unique date and location have been archived on the ECC site; but should the Ateliers de l'Euroméditerranée count as one project or 60 projects, which is the number of artist residencies this project made possible? For this report, we rely on the count provided by the association, which was validated by its administrative council, but the results remain valid even if a different number of structures or organisms is used as the basis of calculation.

[16] Activity Report 2013, p. 5.

[17] Source: statistics provided by MP2013. Analysed by Euréval. One organisation might manage multiple projects.

[18] The residential ateliers were classified as being under the aegis of the department, the CG13 operator. The 60 ateliers associated with Euroméditerranée were assigned to a single cultural organisation even though many artists were hosted by businesses.

[19] Source: statistics provided by MP2013. Analysed by Euréval.

such as with the Albert Camus exhibition in Aix-en-Provence which withdrew several components of an initially more ambitious proposal[20].

New cultural organisations — For a certain number of cultural actors in the territory, the plan to create new cultural organisations as part of the ECC was cause for some debate. The cultural fabric of Marseille in particular includes numerous organisations that are both highly dynamic and yet fragile. For certain people, it was more important for existing cultural organisations to be strengthened, a sentiment that was echoed by the director of one cultural organisation in the territory during the interview process. On the other hand, there were also groups that hoped the ECC would help increase the number of cultural actors who received public subsidies.As it happened, existing cultural actors administered the majority of projects chosen for the programme from the territory. For example, among the 31 organisations[21] that received 200 000 euros or more from MP2013:

→ 22 were organisations mentioned within the Arcade study, and thus already financed by local governments or the national government[22];

→ six were regional agglomerations (Pays d'Aix, Pays d'Aubagne et de l'Étoile, Ville de Marseille, etc. ...), one was an organisation directly managed by government institutions (the Régie culturelle, the arts management group run by the PACA region), and one was a national cultural organism (Fonds régional d'action culturelle).

→ Unaccounted for is Groupe F, an arts organisation based in the territory that is specialised in pyrotechnics and created the *Revelations* series. This was the only organisation receiving more than 200,000 euros from MP2013 that hadn't previously received public financing.

It is also important to note that according to our survey, more than 90% of all cultural actors chosen for ECC had previously received some public financing in the fiscal year 2009, either in the form of an annual grant or special financing for a project (n=75, n=number of respondents). Only 7% of organisations had never received any public financing prior to their participation in the ECC.

In the end, neither the call for projects nor the other methods of programming put in place appear to have helped create many new cultural organisations, although there are examples: *Red Plexus*, *Cabaret Aléatoire*, *Under kontrol*. On the other had, certain Fledgling organisations succeeded in forming partnerships with more established structures that helped them participate in the year: *Association Asphodèle*, *Par les villages*, etc. Finally, numerous individual artists were involved, notably through the Ateliers de l'Euroméditerranée project.

Location of projects — Among the projects, a certain number were carried out across a large part of the region, notably *TransHumance*, *Revelations*, the *GR®2013* hiking trail, the contemporary art routes created by *Ulysses*, *Chasse au 13'Or*, the *Grandes carrioles de la Friche* culinary and art tour, the itinerant cinema *Écrans Voyageurs*, the *Ateliers de l'Euroméditerranée*, *Cirque en capitales*, the *Festins de la Méditerranée* culinary event, and *Quartiers créatifs*. These events represent close to 40% of the financing given to projects. The remaining 60% generally financed projects that were located at a single site.
Still in terms of budgeting, projects that were either produced or coproduced by the ECC were distributed throughout the region with a particular concentration in the main cities or urban centres:

In effect, on the financial level, [the major cities] appear to be the principal beneficiaries of the EEC MP2013 by hosting a great majority of projects despite the fact that there was an expressed desire by many elected officials to ensure that every town had its moment in the sun during the capital year." [23]

It is helpful to add that, in these main cities the projects were concentrated in the neighbourhoods that were already well equipped to host them. Nonetheless, certain projects did take place in rural zones, as well as in what are known as *'quartiers relégué'*[24] or 'relegated neighbourhoods' in the main cities, either because a cultural organisation was already located there (Théâtre du Merlan, Belle de Mai) or thanks to the *Quartiers créatifs* programme or a specific programme like the association Hôtel du Nord's cultural events in the northern end of the city.

[20] For example, see the French article: "Exposition Albert Camus, tout ça pour ça", marsactu.fr, http://www.marsactu.fr/culture-2013/exposition-albert-camus-tout-ca-pour-ca-30287.html

[21] Source: statistics provided by MP2013. Analysed by Eurêval. Not including the MP2013 association, whose projects were financed for roughly 18 M€.

[22] Two structures (Bureau des compétences et des désirs, La compagnie) were not mentioned but were definitely local and received local public subsidies.

[23] Source: The French report issued by business students 'Marseille-Provence 2013: Leçons d'une expérience, Rapport rédigé par des élèves administrateurs territoriaux de l'INET', p. 24 and 29 for this section.

[24] This idea of a 'quartier relegué' refers to neighbourhoods that are difficult to access and often far from downtown, and also socially neglected in the sense there are high levels of unemployment and poverty. It doesn't refer to the safety or security of neighbourhood, nor its urban nature, nor the city's applied zoning policy.

Diversity of disciplines — The final programme included a large spectrum of cultural and artistic fields, and even went further by providing an important place for gastronomy. Cultural organisations and the media generally considered that certain artistic or cultural disciplines were absent or poorly represented. Depending on the critic, this included contemporary world music, local rap, cinema, design, literature, cultural activities for young audiences, dance, or bull fighting.

It should be noted that the EEC did indeed help finance projects related to urban culture and even rap (notably a concert by IAM during the Fiesta des Suds). Nonetheless, these projects largely involved artists from outside the region and were limited compared to the standing of the discipline in the territory:

Emblematic Marseille artists such as Keny Arkana or again IAM didn't wait until the end of the year to voice their criticisms, notably denouncing the lack of exposure provided to urban culture despite the fact that the 2013 project had been selected as a result of this element.[25]

The Off festival and the independent projects it organised didn't really complete the MP2013 programme in terms of under-represented artistic and cultural fields. Nonetheless, the manner in which the Off positioned itself and its tone of "irrelevance ... in the tradition of Marseille" did call upon local artists and, by its non-elitist character, did help push the boundaries of the year. *Yes we camp* (proposed by Marseille 2013 Off with the support of the ECC) was also evocative of these edgy projects, with its "alternative and experimental" camping ground located in the Estaque neighbourhood of Marseille[26].

Other independent projects, such as the *ptit M* (a free exhibition featuring unknown local artists that was organised by the *Tête de l'art* association at Pavillon M) also provided a certain visibility for local artists who weren't part of the official programme. As for *Outof2013*, this forum allowed the entire ECC project to be debated[27].

Finally, certain artists and collectives used the occasion to express themselves and to gain attention for their projects, particularly toward the end of 2012 and the beginning of 2013, such as the Le Fric collective[28] or the local artist Marc Boucherot[29].

We do not have any global data regarding the number of artists or temporary cultural workers who worked within the context of the European Capital of Culture. The MP2013 association accounted for 53 732 hours for temporary workers involving 533 workers (artists and technicians) for projects it produced or co-produced, or the equivalent of 354 months of full time work[30]. It is difficult to extrapolate these numbers for co-produced and branded projects that had their own personnel, but in purely hypothetical budget terms, the year might have employed the equivalent of, at most, 40% of temporary cultural workers in the region.[31]

The unusual case of the unaccepted projects

We don't have an actual number at our disposition of the cultural actors whose projects for MP2013 weren't accepted, but it is possible to arrive at certain estimates:

→ roughly 2 500 projects were proposed during the call for projects. The geographic boundaries for the call for projects doesn't correspond to the final boundaries for the ECC: the call for projects included Toulon, which withdrew from the ECC, but it didn't include Martigues, which was added;

→ 600 projects were financed, which means 1 900 projects weren't selected for the ECC but this doesn't mean 1 900 cultural actors were rejected, in part because not all the projects selected resulted from the call for projects, in part because a single project might have involved several cultural actors who submitted proposals to the ECC;

→ among those projects that weren't chosen for financing, 350 projects (involving roughly 400 cultural actors) were branded. A small number of the remaining cultural actors who weren't in the official programme ended up working with the OFF, although these were entirely original projects.

As a result of a lack of any specific inquiry into the matter, there isn't any definite information available about these non-selected cultural organisations. According to observers, it is likely that these projects were never realised, except in cases where the project predated MP2013 and was only seeking additional support, or were eventually self-financed. Our study revealed that in 30% of cases, a project that wasn't chosen for funding was able to go ahead as a result of other financing.

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[25] Source: "Champagne et Gueule de bois", a French article that appeared in Le Ravi, January 2014.

[26] The project continues in 2014. See the collective's site (in French) at: http://www.yeswecamp.org

[27] http://www.outof2013.org

[28] Source: The French article 'Le collectif Le Fric s'attaque à Marseille 2013, Capitale européenne de la culture', Les Inrockuptibles, 9 January 2013.

[29] Source: Jordanna Matlon, Culture, attack: art, identity and MP2013, available on Ms. Matlon's blog: http://blog.jordannamatlon.com/post/47050290254/culture-attack-marseille-mp2013

[30] Based on a 35-hour work week.

[31] Or roughly 1 500 people, based on the 553 directly involved in actions led by MP2013 (17 M€ out of the 69 M€ dedicated to projects). This number is just to give an idea of size, not the estimate of total jobs created by the ECC. This latter calculation was made based on the evaluation of economic benefits discussed later in the report. In the Bouches-du-Rhône, there are roughly 10 000 people working for cultural organisations involved in performance, and 3 800 paid casual cultural workers. Source: Marsactu, http://www.marsactu.fr/culture-2013/en-annee-capitale-les-artistes-galerent-toujours-pour-trouver-du-boulot-32121.html

[32] According to our survey, 1/3 of organisations with projects presented at least two projects and 20% more than three.

The contribution of MP2013 and other factors

Contribution of MP2013

The dynamic of the capital of culture — First of all, the dynamic of MP2013 played a very important role in the way cultural actors were able to access the ECC:

→ it permitted a number of projects involving cultural infrastructure to be either launched or accelerated, thus facilitating the emergence of new cultural organisations such as the museums at J4 (including the MuCEM);

→ it promoted, in particular during the initial years, awareness among local cultural organisations and then helped mobilize them. Local governments in particular were involved in the process at a very early stage thanks to dialogue with the association.

The length of the preparation phase, amplified by the problems encountered during the call for projects (see above) ultimately resulted in a poor dynamic that led to the negativity in 2012. It was only with the growing success of the year itself in 2013 that members of the cultural community regained their positive dynamic.

The association's selection criteria — Early on in the process, the association announced the criteria that would guide their choice of projects, which largely explains the types of cultural actors who were eventually selected.

The need for organisations that could efficiently manage highly complex projects explains the fact that from the beginning the Marseille-Provence 2013 favoured existing organisations, in particular the leading cultural organisations in the region. It must be remembered that at the time, many doubts were expressed over the ability of Marseille to successfully organize the ECC and it is likely that these considerations played a role in the eventual project selections. According to our surveys, these feelings were echoed by the organisations that were co-financed with only 36% considering that the EEC "allowed organisations that were rarely or never received public financing to obtain financial support" (only 32% of the respondents among the branded projects agreed with this statement).

At the same time, the programme was influenced by the obligation to ensure each local government who aided in the financing of the ECC would "get a return on their money", which is to say that there would be projects located within their jurisdiction. This explains why events were largely spread out across the territory and at least one was located in the jurisdiction of every partner government.

Finally, the artistic and thematic choices for the year correspond with the choices of the association and its leaders, as well as with the opportunities that presented themselves, which were sometimes disappointing. Thus, the very early contact made with the local rap community never resulted in a major project, which led to one of the most prominent polemics at the start of the year of the ECC. All the same, according to our survey, 57% of representatives from co-financed projects ultimately believe that MP2013 "allowed new, alternative, and emerging disciplines throughout the region to obtain financing".

Methodology for the call for projects — MP2013's candidacy for ECC was based on the idea of organizing the year around a succession of themes, which would then be sub-divided into projects organized by the artists. The call for projects that was launched in 2011 led to the evolution of this initial plan.

The method for the call for projects put in place, which was criticised by the cultural sector and was even the subject of ambivalence among those in charge of the association, posed a number of problems. In particular, those who were surveyed said it created an immense workload ("one year of work lost" according to the director of one association) and generated an enormous amount of frustration. As the director of one association indicated, "The mistake was to make people believe that there could be a participative democracy when it came to the cultural programming." Those in the cultural sector didn't know the criteria used to choose the projects and deplored the presence of other candidates on the jury. What's more, those in the cultural sector were rarely informed that the call for projects was only one of several systems in place to choose the programme. "We played the game without knowing the rules," said one organisation that was surveyed.

Certain members of the cultural community also felt that the call for projects led to growing suspicions toward the MP2013 association, a phenomenon that helped undermine a partnership that had been under construction for more than two years. It also incited rivalries between different members of the cultural community in the region at times, two separate groups each accused the other of profiting from favouritism.

Finally, certain local governments regretted that they weren't more deeply involved in the choice of programme and the fact that they only learned what projects would take place in their jurisdiction at the last minute and thus didn't have the time to properly coordinate their efforts.

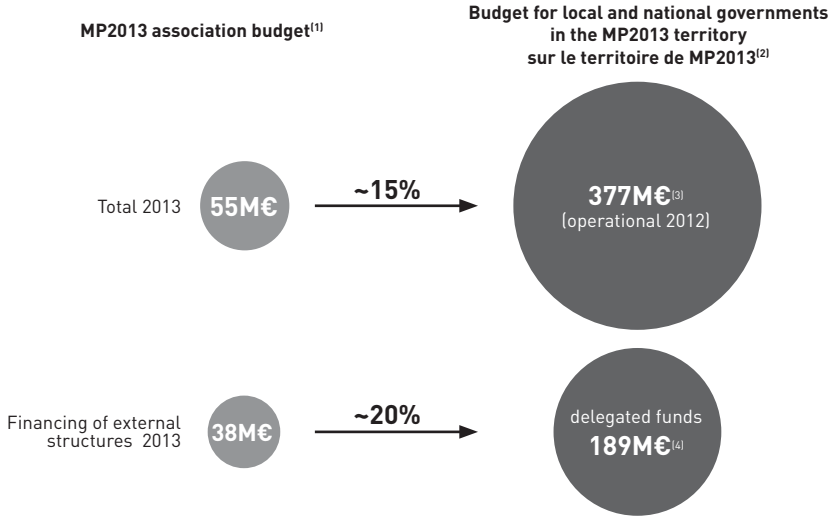
On the other hand, it is likely that this episode contributed to the increase in the number of projects that were co-produced and branded by Marseille-Provence 2013. After the call for projects, the number of projects that were supposed to receive at least a limited financial contribution from the association (some grants were as small as 5 000 euros) grew significantly. In fact, at the beginning there were only supposed to be a small number of branded projects: in the end, there were 350[33].

Specific measures — The call for projects resulted in enough proposals to allow the association to fill all of its programming needs. But some organisations, particularly those presenting live performances (who were already the leading recipient of public funds in the territory) were strongly overrepresented among the selected candidates, while others, like the visual arts, were underrepresented. Thus, the association, in collaboration with local governments, had to encourage the creation of certain projects, or find the means to host them (for example, see the *Ateliers de l'Euroméditerranée*).

In the same vein, the association and local governments took specific measures to ensure that projects involved the most disadvantaged areas of the territory. The *Quartiers créatifs*, launched at the end of 2011, aimed to encourage early on-site participation so projects involving local residents could be held in 2013.

With Quartiers créatifs, it was a matter, as Jean-François Chougnet, the director general of Marseille-Provence 2013, put it, "of using a strong dimension of participation by residents as a base to create permanent artistic presences that embrace very diverse horizons: visual arts, live performances, architecture, writing, landscaping, design ...)"[34].

Figure 3: The MP2013 budget and the budget of the governments in the Marseille-Provence 2013 territory for the year:



[1] Total (2007-2013): 101M€, source: MP2013 / [2] Source : ARCADE, 2012 / [3]Operational budget includes all spending except investments
[4] The delegated budget includes all grants provided to non-governmental organisations

[33] See the French article in La Zibeline: 'Ce que finance la Capitale culturelle', http://www.journalzibeline.fr/ce-que-finance-la-capitale-culturelle/

[34] Source: The French article 'Le sens des quartiers créatifs, Cahier spécial mouvement, MP 2013', p. 5.

[35] Source: the French study 'Financements publics de la culture. L'effort culturel en PACA', from ARCADE, 2008.

[36] In the Marseille Provence 2013 territory, Arcade study, 2012, already cited.

[37] Source: French article "Marseille 2013 Off: l'institutionnalisation d'une critique ?", Nicolas Maisetti in Faire savoirs n°11, December 2014.

[38] Source: ARCADE, 2008. These sums also include the cost of managing the local cultural services. For example, cultural administrative personnel with the regional government and the CG13 are based in Marseille, which helps explain the disproportionate funding it receives.

Expectations regarding the ECC — It is also important to examine the EEC's capacity to finance the diverse cultural actors in the territory. The truth is, the cultural actors who were surveyed in 2012 and 2013 often stated they were afraid that the financing for the ECC would merely be a substitute for the existing public financing that they normally benefited from. This is also one reason why the ECC, and the call for projects in particular, inspired such apprehension.

The total budget for the association for 2013 was 55 M€ and the combined budget dedicated for projects was 53 M€ (2009-2013). However, the annual cultural budget for the local governments and the national government within the Bouches-du-Rhône was functionally 342 M€ in 2008[35] and 377 M€ in 2012[36], of which 37% was delegated to other organisations in 2008 and 49% in 2012. Thus, in reality the budget of the ECC represented between 15% and 20%, depending on the different modes of calculation, of total public spending on culture in the department for the year 2013 (Figure 3).

Other factors to consider

It is interesting to consider two other factors regarding the question of how cultural organisations were able to access the ECC programme.

Barriers to entry — The association's organisation of the year, and in particular its choice of using a call for projects, was not adapted to the smallest cultural organisations or amateur cultural organisations (which, as we have already seen above, weren't actually targeted).

In effect, to respond to a call for projects requires the formulation of a proposal, identifiable goals, means to meet those goals, the ability respond to the specific administrative demands of the call for projects, and the ability to foresee the future requirements and deadlines of the project. This process requires both resources and skills that often aren't found in smaller or amateur cultural organisations, a phenomenon that the researcher Nicolas Maisetti expressed in the following manner:

At least three factors combined to marginalise members of the local cultural community: political efforts to concretise and homogenise the cultural operators; their obligation to submit to bureaucratic procedures; and the cost of entry induced by the 'international requirements' put in place by MP2013[37].

In the end, it seems that the smallest cultural organisations generally didn't respond to the call for projects, or responded with only one project, while the larger organisations, who were more familiar with such procedures because they were obliged to follow them on the national level, presented a portfolio of projects, maximising their chances to have at least one chosen.

It has been noted elsewhere that when the MP2013 association sought to create a partnership out of nothing with small local non-professional organisations, it may have led to conflicts or setbacks, as was the case with *Quartiers créatifs* (see below). Multiple actors also voiced regrets that the association too often wanted to be producer or co-producer instead of leaving this role to the local structures, which might have allowed for a deeper involvement by non-professional organisations.

The influence of regional cultural organisations — The programme for the ECC ultimately reflected the cultural landscape of the territory, which has a wealth of professional or semi-professional structures (more than 2 100 publicly financed organisations according to Arcade), which are essentially located in the major urban centres of the territory.

One result of this is that MP2013 didn't need to instigate or help push for the creation of new cultural organisations to ensure there would be a quality programme as the cultural scene was already fertile.

The other result was that MP2013's financing was spent in areas already rich in cultural actors and infrastructure (in the urban cores of the major cities in the department) because this is where organisations capable of carrying out these projects were found. In the end, between 40% and 60% of the budget was allocated to four communities: Marseille, Aix-en-Provence, Istres (the home of the agglomeration known as Ouest Provence), and Arles. For comparison, 80% of financing from local governments and the national government was allocated to these four cities in 2008[38].

PRINCIPAL OBSERVATIONS REGARDING ACCESS TO THE ECC BY CULTURAL ACTORS

• There are numerous cultural organisations in the MP2013 territory. This allowed the association to tap into a rich network of existing structures that were capable of managing the projects trusted to them.

• The organisations that were co-financed or branded were for the most part based in the territory, but they consisted mostly of pre-existing structures that had already received public financing.

• The recourse to a call for projects to define part of the programme had a number of negative consequences, paralysing the association for a number of months and provoking the frustration of a number of actors in the cultural community.

• But in the end, the necessity to provide more space for projects that were presented during the call for projects resulted in a much larger programme involving many smaller structures than initially planned for. Still, this method wasn't adapted for smaller cultural organisations and generally they didn't respond to the call for projects.

• The financed projects were located throughout the department, notably thanks to the existence of territory-wide projects and the desire of each local government to "get a return on their money". The projects generally took place in urban centres because this is where the cultural operators who received financing were located.

• The final programme touched upon a large number of cultural and artistic disciplines, corresponding to criteria that were chosen by the association. Certain disciplines with local connections, such as rap, were nonetheless absent or poorly represented. Yet at the same time, as a result of a lack of sufficient proposals, the association still had to take specific measures to ensure that neglected areas of the territory were accounted for and that, notably, the visual arts were properly represented.

• The Off and the independent projects didn't really expand the programme in terms of artistic disciplines, but they did provide more cutting edge events that nicely complimented the ECC.

DID LOCAL CULTURAL ORGANISATIONS IMPROVE THEIR PROFESSIONAL PRACTICES AS A RESULT OF THE ECC MP2013?

What happened

In this section, we will first present the financed projects in terms of the ECC's goals, and then go on to discuss how and in what cases the cultural actors that led these projects improved their practices or strengthened their partnerships.

The character of the projects

The following ECC objectives directly affected the financed projects:

1. Support the creation and distribution of ambitious work by collaborating with artists from countries in Europe and the Mediterranean.

2. Valorise the artistic and cultural potential of the MP2013 territory and contribute to the long-term enhancement of its international reputation.

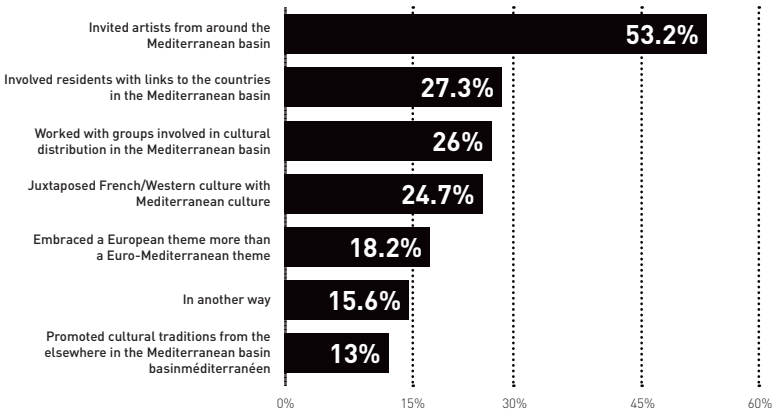
3. Innovate when it comes to the relationship between culture and society and how culture is integrated into public spaces.

4. Involve the residents of the Marseille-Provence 2013 territory by using a participative approach and by privileging their access to events.

For this section, the report relies on, unless otherwise noted, the survey conducted among those who managed projects[39].

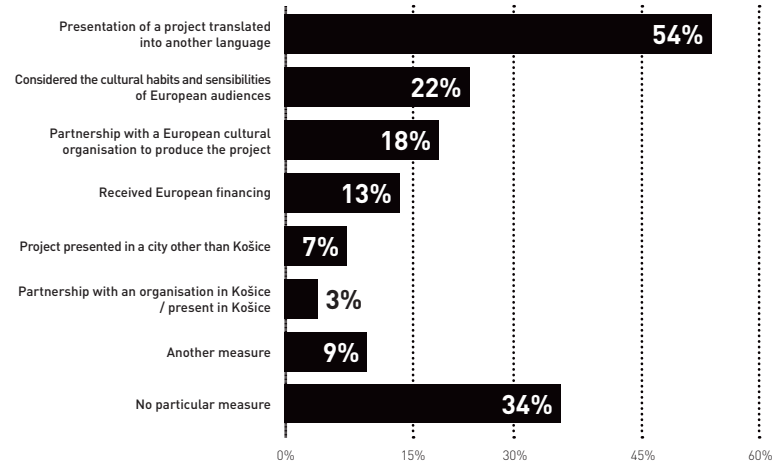
The Euro-Mediterranean theme — According to project managers, more than 80% of projects were connected to the Euro-Mediterranean theme. The basis for this connection varied, but the principal method (53%) was to invite artists from the Mediterranean basin. Prior to the ECC, this Euro-Mediterranean theme had been rarely addressed by 36% of cultural actors, occasionally addressed by 42%, and regularly addressed by 22%.

Figure 4: In what ways does your project embrace the Euro-Mediterranean theme of Marseille-Provence 2013? (n=77)



[39] The methodology used for this survey is explained more precisely in the survey report. It is nonetheless important to indicate that the concerned structures were generally well-established (10 years or more), professional, with 70% having between 0 and 10 full-time employees and 90% of them already receiving public subsidies. This is probably representative of all the co-financed projects, but not the overall cultural community in the territory.

Figure 5: What measures did you take to add a European dimension to your project? (n=76)



European dimension — Those structures and organisations questioned generally took measures to give a European dimension to their project (see Figure 5); only 34% indicated that they didn't take "any particular measure". For more than half of the projects, the event was also supported in at least one language other than French, and 18% indicated they had worked in partnership with another European structure.

Open to all audiences — According to the survey, the great majority of concerned projects attempted to attract audiences who didn't traditionally frequent cultural events as well as audiences from culturally neglected neighbourhoods and audiences from financially disadvantaged backgrounds. They also targeted visitors: either from elsewhere in the region, France, or foreign countries.

Figure 6: With your project, did you attempt to reach the following audiences? (n=73[40])

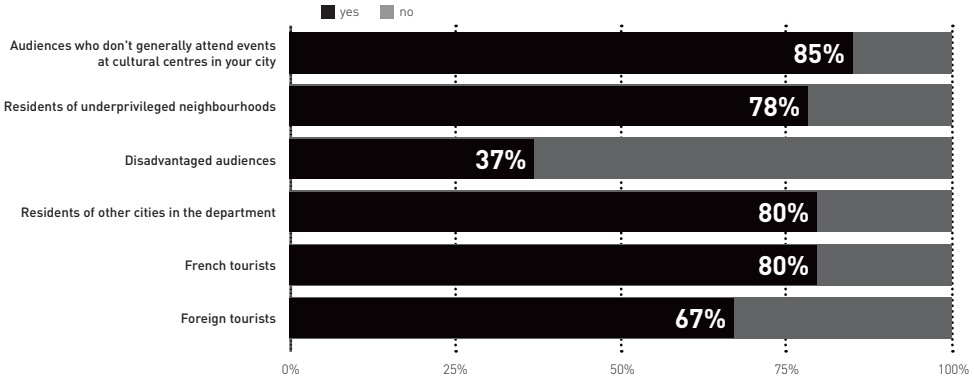
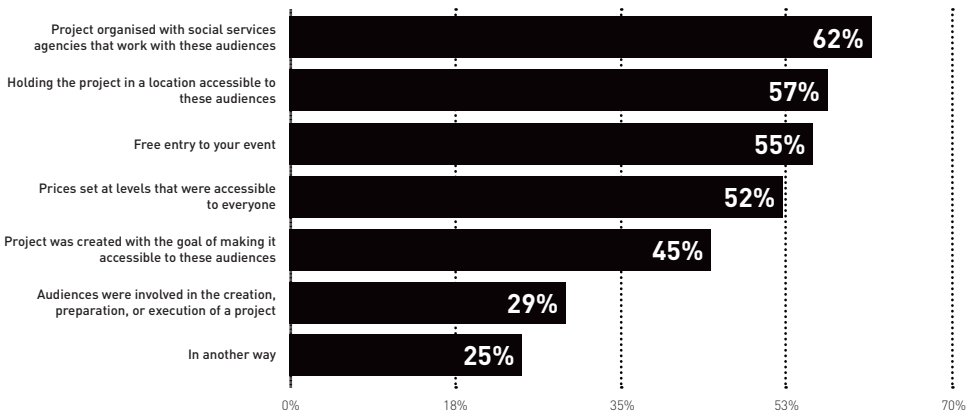


Figure 7: What measures did you take to attract these audiences? (n=73)



[40] The numbers are similar for branded projects. See the survey report.

Close to 90% of projects attempted to attract audiences who never or rarely attended cultural events or invested in culturally neglected neighbourhoods. They did this using various methods (see Figure 7), either by working with local social service organisations or making events accessible – physically, financially, symbolically – to all audiences or, to a lesser extent, involving those audiences in the conception, preparation, or execution of the project (29%).

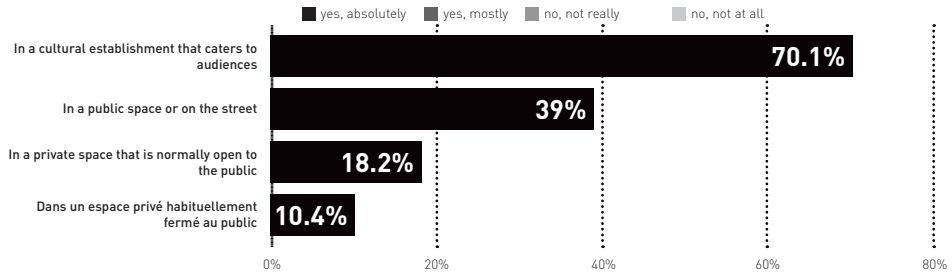
The participative approach was only new in about a quarter of the cases. Nonetheless, the ECC did allow this approach to be enhanced for certain organisations. For example, this was the case with the Théâtre d'Arles and "la brigade de magiciens" (the magicians' brigade) or "The Rite of Spring", or with the mobilisation of more than 100 volunteers for three projects by Karwan.

The results of these approaches will be discussed in the next section.

Presence in public space — 70% of the projects took place within cultural structures compared to 40% in either public spaces or on public streets[41] (representing about 30% of organisations).

[41] A project could have taken place in more than one location, hence some projects counted twice.

Figure 8: Where did your project take place? (n=77)



Certain operators proposed projects that would take place in unusual locations, either by their proper initiative or at the request of MP2013. For example, this was the case of the Théâtre d'Arles, which held events in a church and under a tent.

In the end, the largest events took place in public spaces: the opening ceremony, *Revelations*, *Entre Flammes et flots*, *TransHumance*, *Métamorphoses*, for example.

Providing organisations with new skills

There are essentially three ways an organisation can gain new skills: recruitment, training, or experience.

Acquisition of skills — The interviews with the cultural actors showed that they didn't spontaneously agree to the notion that they had acquired new skills as a result of the ECC. Only a few organisations mentioned that their staff had received training: for example, Karwan trained an administrator in foreign contracts and provided English training for employees while Voyonsvoir implemented a training program in cultural sponsorship. The City of Vitrolles made cultural production an internal process and thus city staff gained new skills relating to cultural sponsorship.

On the other hand, when presented with a list of skills, 72% of the cultural organisations surveyed indicated that they had acquired at least one new skill. Meanwhile:

→ no single new skill emerged as having been acquired by more than half of the organisations;

→ the development mostly involved the strengthening of existing skills rather than the acquisition of new skills (those who responded 'yes, absolutely' to having acquired a new skill ranged from 4% to 14%).

The particular skills that were strengthened were: managing relations with institutional partners, (50%), project management (49%), and the conception of cultural projects (47%). The use of public space is a particular case as only 30% of cultural actors were concerned. Among this subset, 44% indicated they had acquired new skills or reinforced existing skills.

On the other hand, there were fewer organisations that answered that they had acquired new skills relative to the technical aspects of their projects. Environmental responsibility (which was an objective of the ECC) was the least-cited new skill among those who answered the survey (18% positive responses).

Figure 9: Would you say that within the context of this project you were able to acquire new skills relating to ... (as a percentage, n=74)

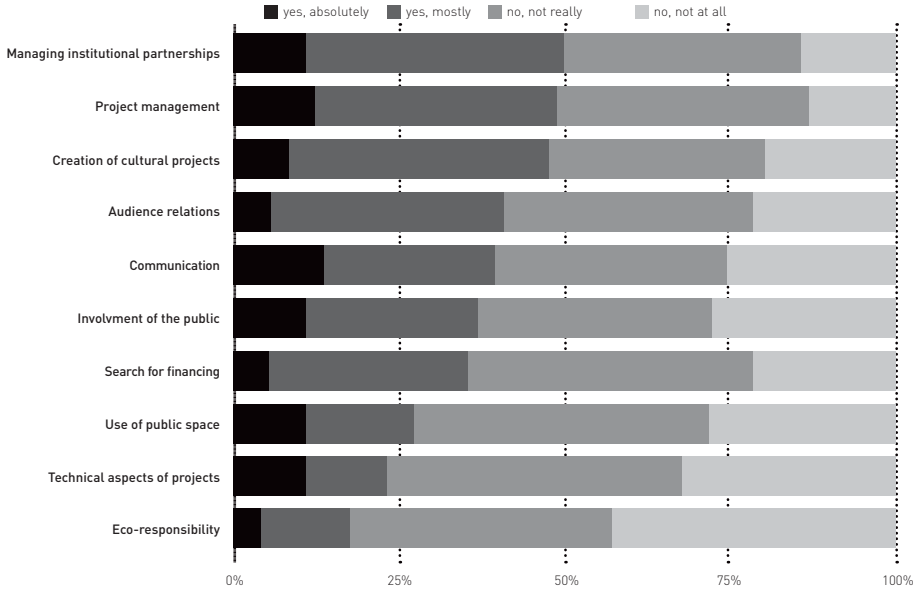
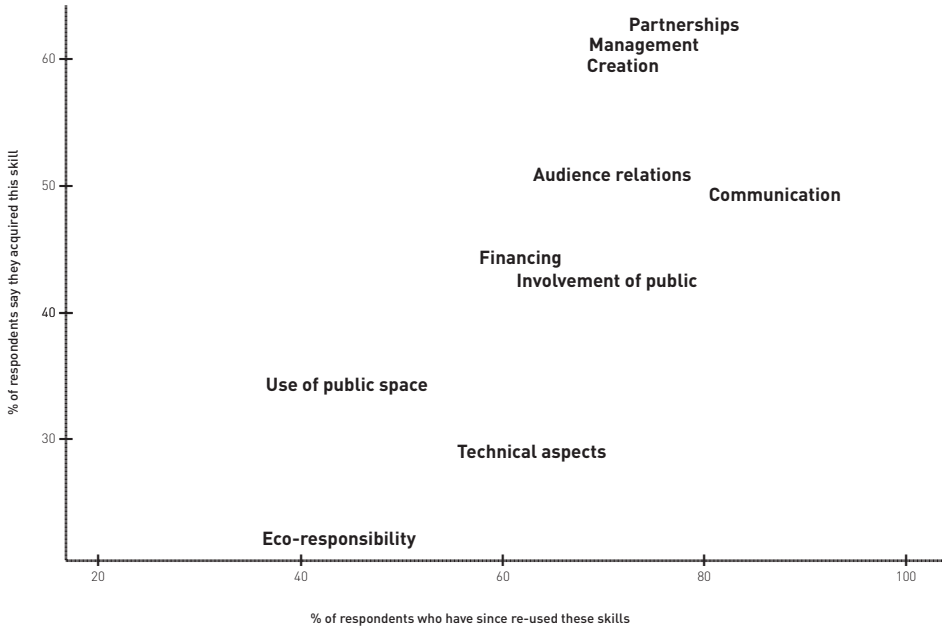


Figure 10: Since the project, have you put newly acquired skills into practice? (as a percentage, n=59)



For the most part, those who answered that they had acquired new skills found they had since reused them, in particular the three principal skills mentioned above, but also communications skills, which were the most frequently reused (see Figure 10).

These figures are comparable, although a little inferior to those collected from Turku[42]:

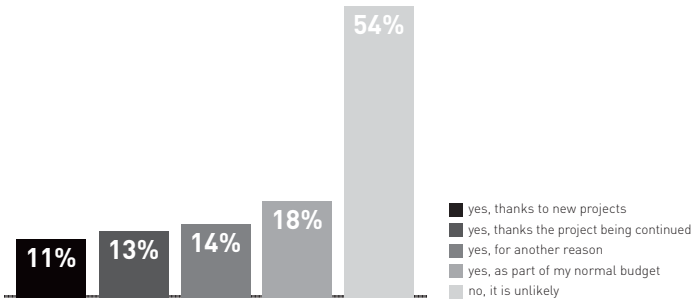
Over three quarters (78%) of organisations involved in the delivery of the Turku 2011 programme felt that their operational capacities had increased as a result of involvement in the ECoC year, with 86% stating that they had learnt new things (Hakala and Lemmetyinen, 2013: 9-10)[43].

Recruitment — In this survey, 42% of cultural actors that managed projects indicated that they specifically recruited for projects that were co-financed by MP 2013.

This recruitment was limited: for two thirds of the organisations, the new recruits represented less than 10 per cent of their employees at the start of 2014. However, it should be noted that the majority of recruitment was done either using temporary work contracts or by using the system known as '*intermittence du spectacle*' in France, a specific employment designation for casual cultural workers.

While the principal reason organisations cited for their recruitment was the need to add staff to cope with the increased workload (34% of respondents[44], 61% for branded projects), the need for new skills was also a real, although minor, motivation for recruitment.

Figure 11: After 2013, do you think you will retain at least some of the employees you hired for the European Capital of Culture? (as a percentage, n=72)



Almost half of all cultural actors surveyed hoped to retain some positions for a variety of reasons (this was also the case with branded projects). The other half considered it unlikely they would retain the new staff.

It should be noted that 70% of organisations also recruited volunteers, in particular to carry out specific events (44%) or for the entire preparatory phase (25%).

Training — Finally, more than half of all respondents answered that they had trained employees during the past two years, but in three quarters of these cases, the training wasn't actually related to the management or production of the project that was co-financed by MP2013.

There are no statistics available for training for organisations with less than 10 employees (organisations with less than 10 employees represented 70% of respondents). However, as a guideline, 35% of organisations of between 10 and 20 had no training in 2010 and the rate of training decreased with the size of the organisation[45]. It is also noteworthy that organisations with little history of engaging in training programmes only engaged in necessary training, such as training somebody for a new job. These numbers generally correspond with national trends in this sector, and in any case do not show a level of training higher than what might have been expected.

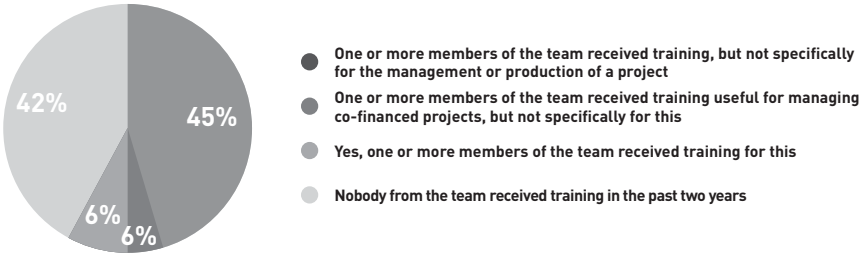
[42] Turku is the only other European Capital of Culture for which we possess a similar measurement. Other ECCs sought to discover if the event bestowed organisations with new skills but they relied solely on interviews for this.

[43] Source: European Capitals of Culture: Success strategies and long-term effects, Directorate-General for Internal Policies, European Parliament, 2013, p. 121.

[44] 50% of respondents answered "another reason", often in conjunction with another answer, which can be explained two ways: either the questionnaire didn't allow them to adequately explain their reasons for recruitment or the number reflects recruitment that wasn't related to MP2013 and thus indicates the question was misunderstood.

[45] Source: CEREQ, 2013, using the French section of the 2010 CVTS (Continuing Vocational Training Survey). It should also be noted that results didn't really vary by domain. http://www.cereq.fr/index.php/articles/Focus/60-des-petites-entreprises-ne-s-engagent-pas-ou-tres-peu-dans-la-formation-continue

Figure 12: Over the past two years, have you or other members of your team followed any specific training programmes destined to help you better manage the project that received co-financing? (as a percentage, n=64)



Strengthening of partnerships

According to those familiar with the region, it is very important for local cultural organisations to build partnerships with institutions, both for financing and for support in creating and producing projects, as this helps create dependable and permanent infrastructure.

New partners — Recall that the organisations chosen to participate in the ECC were often already the recipients of public financing and some had a long history of partnerships (the Friche La Belle de Mai, for example). Nonetheless, organisations were still able to develop new collaborations and reinforced existing collaborations in order to create and produce new joint projects. There were also completely new partnerships, such as between the Festival d'Art Lyrique and the arts space Bois de l'Aune, or between the electronic music festival Marsatac and the classical music community.

According to our survey, close to three quarters of organisations indicated they had formed at least one new partnership in the context of the year, with 39% obtaining financial partners and 51% forming working partnerships to create and produce a project.

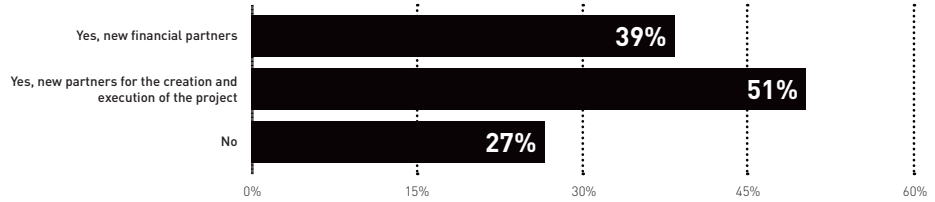
These numbers are in the upper bracket in terms of other Capitals of Culture:

→ in Cork (2005), "28% of organisations that were assessed declared that their engagement with the Capitals of Culture resulted in the formation of new ties with other organisations, most often within the Cork region but also across Ireland and internationally"[46];

→ in Turku, "93% of projects [...] developed new contracts and networks as a result of their experience [with the ECC]"[47].

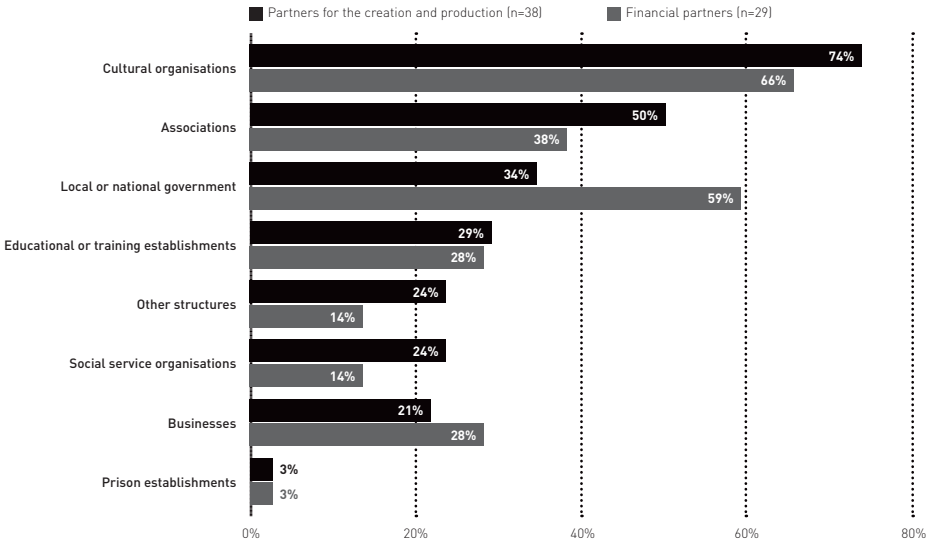
Diversity of partnerships — The results of our research show that there are multiple types of partner: cultural organisations, community associations, and local governments, which represented the majority of partners. The latter group mostly acted as financial partners (59%). On the other hand, community associations were most often cited as partners in the conception and production of projects rather than as a financial partner.

Figure 13: Did you develop this project in partnership with other organisations? (N=73) Among the financial partners, were there ... ? (n=29, 38)



[46] Source: The study 'Capitales européennes de la culture', Labforculture.org, pg.7. http://live.labforculture.org/2009/01/culturalcapitals/Cultural%20Capitals_FR.pdf

[47] Source: European Capitals of Culture, previously cited, p. 30.



Partnerships with the private sector were also developed. The cultural actors concerned expressed the desire to make these relationships permanent and to enhance them. Yet, according to these same cultural actors, at the same time a new form of competition also appeared as multiple groups vied for private financing.

MP2013's contribution and other factors

The ECC's criteria — Among cultural actors, the criteria for the events generally imposed very few constraints. Many organisations adapted their project to the context of the ECC, for example by scheduling events to coincide with broader themes created by MP2013.

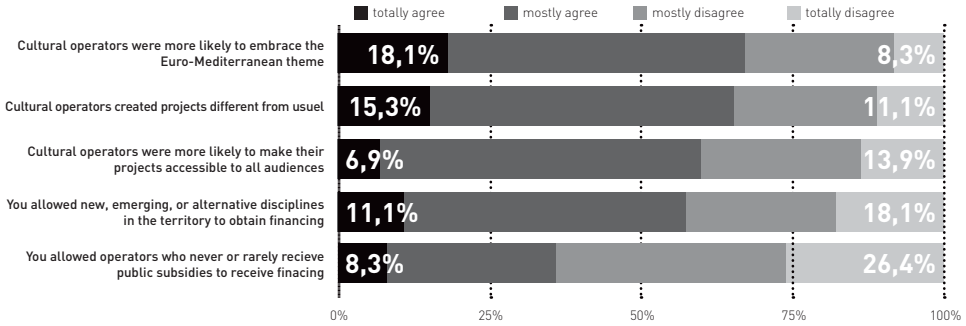
Nonetheless, according to our inquiries, more than six out of ten project managers believed that the MP2013 financing encouraged:

→ the embrace of the Euro-Mediterranean theme: for example, many cultural actors indicated they had smoothly adapted their approach or their project in progress to harmonize it with the year's Euro-Mediterranean theme;

→ the creation of different projects, notably to distinguish an organisation from other projects, but also because the ECC represented the opportunity to be more ambitious and to think bigger (see below);

→ the accessibility of projects for all audiences, in two main areas: using public space[48] and using specific measures to attract audiences who normally don't frequent cultural events[49].

Figure 14: In the end, for each of these statements regarding the financing of projects by Marseille-Provence 2013, would you say that ... ? (N=72)



[48] Among the organisations that were co-financed and had a project that took place at least partly in public space. This was normal practice for 36%, occasional for 40% and unusual for 23%.

[49] This willingness to get involved in this way was only new for 5% of organisations, according to our survey. However, the specific measures taken to form partnerships with social service providers might have been new.

The organisation of partnerships — Marseille-Provence 2013 had a direct influence on partnerships when it played a role in establishing them, either for their own productions (Ateliers de l'Euroméditerranée, Quartiers créatifs), or in their co-productions where they helped connect cultural organisations and artists.

The role played by MP2013 in these partnerships provoked diverse reactions among those involved in the projects, including financers and, in hindsight, member of the MP2013 association itself. If the association allowed a certain number of major projects to be carried out effectively, it also pushed cultural organisations to strengthen their financial, technical, and creative partnerships with an ephemeral organisation – the MP2013 association - instead of more permanent structures (see the section consecrated to long-term changes in cultural practices).

The procedure for the call for projects that was put in place didn't have a direct impact on the partnerships between cultural actors. These actors weren't able to meet with members of the MP2013 association to declare themselves open to partnerships or to request help in forming partnerships. Still, the association did use its resources to organise certain partnerships when they considered it relevant.

It is also possible that the ECC actually extinguished certain partnerships, in particular with private sponsors. In total, the MP2013 association was able to solicit more than 14 M€ in sponsorship (see below). Among others, Marsatac, Les Suds d'Arles, the Friche La Belle de Mai, all reported that they found themselves competing with the association in 2012 and 2013 when they contacted their usual financial partners for support.

Project operation — The other observed changes, notably in terms of acquisition of skills or the forming of partnerships, seem to have been the result of the project's standard manner of operation.

The ECC's contribution came from two mechanisms:

→ On one hand, the desire of cultural actors to use the ECC as a means to grow their organisations and to gain greater visibility for their projects, which was probably a major factor in the strengthening of their organisations.

→ On the other hand, it was the actual financing, which in a certain number of cases made projects possible or reinforced them. The cultural actors involved in the year spontaneously agreed that the ECC had helped with the growth and the visibility of their projects more than actually changing the nature of the organisation.

The minor differences in responses from cultural actors that were co-financed and those that were simply branded also seems to argue that the impacts seem to have come from the creation of the projects and the dynamic of the year rather than the specific financing from MP2013.

Nonetheless, the financing could have contributed to specific impacts, such as the recruitment of new employees for the projects.

PRINCIPAL OBSERVATIONS ON THE IMPROVEMENT OF PROFESSIONAL PRACTICES

• The cultural actors that were co-financed or branded generally made positive contributions to the main goals of the year: their projects embraced the Euro-Mediterranean theme, two thirds integrated a European dimension to their projects, and 9 out of 10 made efforts to attract audiences that traditionally didn't attend cultural events (partnerships with community associations, events held in public spaces).

• The cultural actors that were co-financed or branded acquired or strengthened their skills as a result of their projects: notably their ability to manage relationships with partner institutions and their ability to create and manage cultural projects. Most importantly, numerous organisations employed these new skills after the ECC was finished. The recruitment and training of employees was above all a result of the heavier workload rather than any attempt to bring new skills into organisations.

• Within the context of the year, the vast majority of cultural actors also developed new relationships with new types of organisations and strengthened existing relationships. This new cooperation involved the conception and production of events as well as financing.

• These changes in the way the cultural actors operated almost all took place "on the fly", during the creation and production of the projects themselves. The ECC's project criteria weren't very constraining, but they did push the organisations to go further, in particular to attract new audiences. The ECC also encouraged organisations to present more ambitious projects and to plan for the future while also facilitating certain partnerships.

• As a result of the closing of the MP2013 association after the ECC, all of the partnerships they engaged in were destined to be temporary.

WERE CULTURAL ORGANISATIONS SUCCESSFUL IN ATTRACTING LARGER AND MORE DIVERSE AUDIENCES AS A RESULT OF MP2013?

What happened

By the end of 2013, the attendance figures for the ECC were quite high. Certain events, notably those that took place in public spaces, greatly exceeded expectations while attendance at other events can be considered a disappointment. That the nature of people's participation also greatly varied.

The attendance

However the figure is calculated, the total attendance for events held within the context of the ECC MP2013 is a significant number.

Methods of calculation — It is difficult to provide a precise estimate of attendance for an event such as Marseille-Provence 2013, which took place across a vast territory over the course of a full year. Nonetheless, several indicators are helpful in defining this figure:

→ First, the MP2013 association estimated a total number of visits by adding up the attendance at events that were part of the official ECC programme. In this case, the same person can make multiple visits to events. Also, a person could be present while an event is underway yet not actually visit the specific project. **In total, the association counted 11.015 million visits**[50]. The success of the Musée National des Civilisations de l'Europe et de la Méditerranée (MuCEM) played an important role in this figure with 1.8 million visits for the period.

→ Next, it is possible to determine to number of individual visitors: **1.9 million additional visitors** were welcomed to the territory[51].

Finally, two studies (BDR Tourisme, Occurrence for Euréval) were conducted on the attendance of local residents at ECC events. The first, conducted in fourth quarter, concluded that two thirds of residents attended at least one event and among the final third roughly 40% expressed a desire to attend an event before the end of the year. The second study, conducted early in 2014, concluded that 74% of residents had attended at least one event (67% of this figure) or a large public gathering (52%)[52]. By comparison, 66% of Liverpudlians attended at least one event during the ECC held in Liverpool in 2008. In both studies, the MuCEM emerged as an engine for attendance: half of residents visited the museum (in 9 cases out of 10 to visit the site without seeing the exhibitions) and among the other half of residents 90% said they intended to visit the museum.

In terms of the population of the Bouches-du-Rhône, 1.45 million people from the department participated in at least one event during the year[53].

[50] Source: MP2013 assocation report presented to the General Assembly on 17 March 2014.

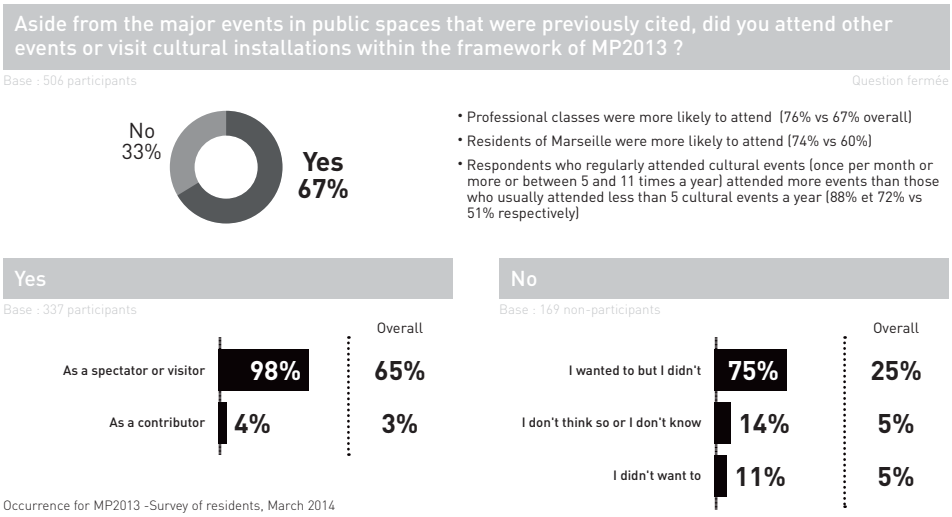
[51] Source: BDR Tourisme. These numbers in response to question 2 are presented in more detail later in the report.

[52] The study by BDR Tourisme revealed there were about 20% "unswayables who wouldn't participate in any event".

[53] Or 54% of the department's population (1.96 million residents).

Figure 15: Participation in Marseille-Provence 2013 events

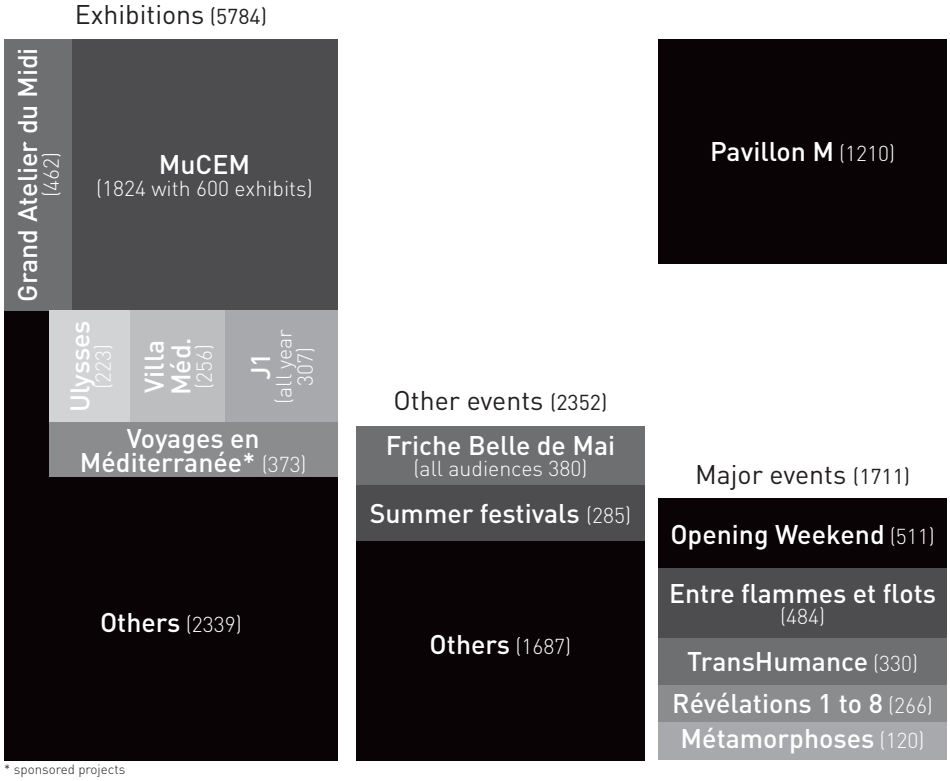
2 in 3 residents were involved in at least one EEC event as spectators



Occurrence for MP2013 -Survey of residents, March 2014

Attendance of specific events — The ECC was anchored by several marquee attractions: 12 events or sites accounted for more than 50% of all visits (excluding Pavillon M). The MuCEM alone represented close to 20% of visits and the opening weekend 6% (Figure 16).

Figure 16: Event attendance for the ECC (Source MP2013, in thousands of visits. Only events that attracted more than 200 000 visits are mentioned.)



* sponsored projects

The 98% of projects not mentioned welcomed the other half of visits for the ECC. The organisers of these projects were, for the large majority, satisfied with their attendance figures (80% according to our research), and this includes events held outside of Aix and Marseille, as noted by groups in Istres, Martigues, Aubagne and Châteaurenard. For these events, the increase in attendance was actually greater than in Marseille because these regions started with a lower level of cultural involvement.

According to the MP2013 association, the attendance figures reflect an appetite among the public for out-of-the-ordinary events. The numbers reveal pleasant surprises for the *GR®2013* (120 000 visits), *Yes We Camp* (49 000 visits including 15 000 overnight stays) and the *Champ Harmonique* (40 000 visits). The *Nuit industrielle* (Industrial Nights) in Martigues and Port-de-Bouc, with 14 000 spectators, was also a remarkable success, especially considering the theme of the night and the fact that the sites were difficult to get to. The new history museum in Marseille (Musée d'histoire de la Ville de Marseille) and the Musée des arts décoratifs (Château Borely), also registered a highly satisfactory number of visits for their re-openings[54]. There were other notable successes, but their attendance figures were expected, such as with the *Folle histoire des arts de la rue* and *Cirques en Capitales*.

Among the successes, there were many sites with limited access: for example, both the Friche La Belle de Mai and Château Borely are difficult to reach from the tourist centre of Marseille, while the Champ Harmonique in the remote Marseille community of Goudes is a daunting trek from downtown.

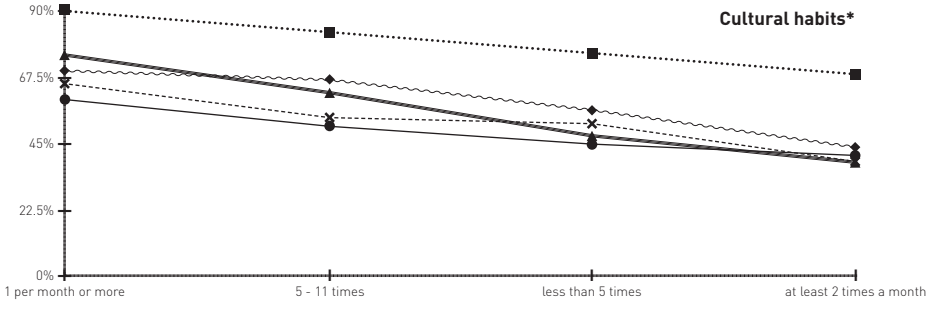
Among the disappointments in terms of attendance: *TransHumance*, which was an enormous success in the cities but not quite as popular in the countryside, and whose logistics ended up being much more complicated than anticipated. As for the twin art exhibitions *Grand Atelier du Midi*, these did attract 462 000 visitors but 600 000 were expected.

Audience satisfaction — The visitors to the ECC were for the most part satisfied with their participation, as multiple sources show.

Among the residents, according to our research, 88% gave events ratings that ranged from excellent to average and 70% gave events marks of more than 7 out of 10. What is clear is that the level of satisfaction increased with the participation: those who attended at least one event gave a much higher rating than those who didn't attend anything (7 vs. 5.4). The most satisfied members of the public were those aged 60 and older, Marseille residents, long-term residents, and audiences who regularly frequented cultural events[55].

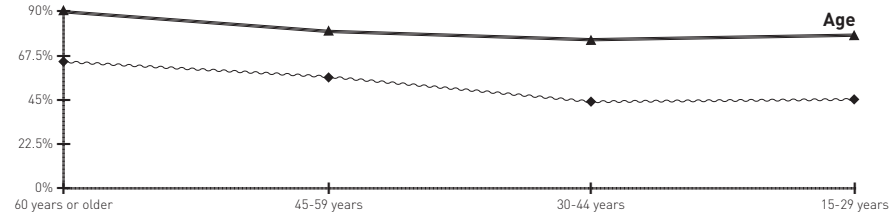
When looking at the details, there isn't any specific cause of dissatisfaction: the quality of the programme was the primary cause of satisfaction (80% of all respondents, 90% among those respondents who attended ECC events). Here too, respondents who were older and had already attended cultural events were the most satisfied (Figure 17).

Figure : Satisfaction levels correlated with cultural habits and age.



The cultural programme was of high quality / The price of events was affordable
It was easy to get to the events or the temporary installations
You feel you were well-informed about Marseille-Provence 2013
There were enough events helds in proximity to your home

* In response to the question: In 2012, what frequency did you attend at least one of the following cultural events: go the movies, attend a concert, play, or dance performance, visit an exhibition in a museum or elsewhere?



[54] Source: "Marseille: clap de fin", French article from the Le Journal des Arts, January 2014.

[55] This was also confirmed by the study conducted by BDR Tourisme, see below.

It is interesting to notice that the study carried out among residents by BDR Tourisme during the final quarter showed less positive results with a satisfaction level varying between 39% for the pricing policies and 66% for the number of free events. Several elements tend to show that the satisfaction levels climbed after the year ended and the consensus among the population was that the ECC was a success.

The events or the installations that particularly satisfied residents were the exhibition *Raoul Dufy, de Martigues à l'Estaque* (93% satisfaction rate, 20 000 visits), the MuCEM (93%), *Cirque en capitale* (92%) and *Le grand atelier du midi* (91%)[56]. The event on the list with the lowest level of satisfaction was *Mon île de Montmajour* (71%, 65 000 visits). These general sentiments were confirmed by the studies conducted by AGAM:

The perception of events held by the people of Marseille was very positive. The organisation, the content of the events, and the ambiance were all highly appreciated. On this last point, it was often noted that the general atmosphere at events was convivial, family oriented, and good-natured. The fact that there weren't any major incidents during performances corroborates the sentiment expressed by the participants. There was also a tangible appropriation (or re-appropriation) of public spaces such as the Vieux-Port (in its new configuration) and the J4 esplanade by city residents who had lost the habit of using these places[57].

Who were the audiences?

There is no global quantitative study that would permit the exact nature of ECC audiences to be defined, but certain elements provide an idea.

Types of audiences — Sylvia Girel, a researcher associated with the sociological institute the Laboratoire méditerranéen de Sociologie (LAMES), coordinated on-site studies of audiences at events:

If we take the collection of sites and events from the year 2013, we find all categories of audiences analysed by sociologists: dedicated audiences who regularly frequent arts and cultural events and who, thanks to the year, found their options had multiplied; audiences that are qualified as 'univores'. We also find specific audiences such as school groups, tourists, company outings, etc. who each come with their own motives and expectations; unexpected audiences who discovered and became fans of certain forms of creativity, and we can also cite the volunteers from MP2013 for street art or contemporary arts, and families who were introduced to the diverse forms of the modern circus. There was also resistant or reluctant audiences; those who were indifferent, etc.[58].

Social-professional category and cultural practices — The inquiry among residents shows that the management class and the intellectual professions were more frequent visitors to events or the sites that were emblematic of the year (76% compared to 67%). Even more so, people who were already deeply involved in culture were also more likely to attend ECC events (people attending one culture event or more a month: 88%; people attending 5 to 11 a year: 72%; this compares to 51% for other people). These same trends can be found with the MuCEM, with 77% of respondents who attended cultural events once a month or more visiting the museum compared to the overall rate of 52%.

As there was no specific inquiry made, we lack data on the social or professional category of the visitors to Marseille-Provence 2013. Still, a study of tourists visiting the territory conducted by the CCIMP, the region's chamber of commerce and industry, showed that 62% of visitors were management workers or executives or worked in professional positions, while 28% were employees or exercised middle class professions (or 'CSP+', the designation used by the French statistics agency for upper class professions)[59].

Similar observations were made for other cities in Europe that hosted the ECC. Even if the tools to measure the statistics were different, they tend to show that the number of executives, white-collar workers, and people in intellectual fields made up a large part of visitors, the number being either lower or higher than that observed in Marseille depending on the case:

→ In Porto (2001), a study conducted of 5 000 visitors showed 47% were professional class;

→ In Bruges (2002), 87% of tourists visiting the city were from "upper social classes"[60];

→ In Luxembourg (2007), the professional class was also the most represented[61].

[56] Source: José-Pierre Cholvy Consultant/BVA/Bouches-du-Rhône Tourisme - 2013.

[57] Source: AGAM, the MAGE 2013 study, a report on major events.

[58] Source: Sylvia Girel in the French article "Une forme d'appropriation de MP2013 a eu lieu, même à travers la contestation", by Elodie Crézé, Marsactu, 30 December 2013.

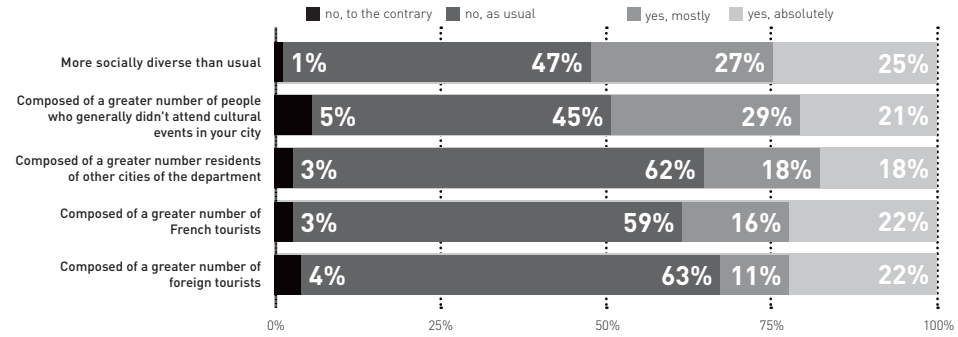
[59] Source: 2013 survey of tourists by CCIMP. These numbers include retired people. If you exclude retired people, the 'CSP+' category represented 45% of tourists in 2013. These tourists didn't neccesarily come for the ECC, but more than 80% of them were aware it was taking place.

[60] Source: European Cities and Capitals of Culture, Part I, Palmer-Rae Associates for the European Commission, 2004, p. 120-121.

[61] Source: Luxembourg and Greater Region, European Capital of Culture 2007, Final Report, p. 40.

At the same time, among those who organised projects, 50% stated that they considered their audiences to be more diverse than normal and largely composed of people who didn't normally attend cultural events in the city, while the other half considered there was no difference from their regular audiences.

Figure 18: In terms of your attendance, would you say visitors to your project were... ? (n=73)



Residents of disadvantaged neighbourhoods — We don't have specific data regarding these communities, who generally don't have much mobility. As noted earlier, the year's events, even if they were spread throughout the city, were mostly concentrated in the city centres or in cultural structures, but a certain number of specific events nonetheless were able to reach these audiences (see below).

It is also worthwhile to distinguish between Marseille and mid-sized cities (Martigues, Istres, Aubagne, etc.) where the neighbourhoods considered disadvantaged are often close to downtown. In the latter instance, it seems that events held in public spaces attracted residents of disadvantaged neighbourhoods. But in Marseille, studies conducted by AGAM[62] show that residents of disadvantaged neighbourhoods in the north of the city were in comparison less likely to participate in the major events held in public spaces downtown, while residents of the residential neighbourhoods in the south of the city and east of the city[63], where there is sparse cultural infrastructure, seem to have participated in much larger numbers and to have visited the renovated areas of the city (notably the J4). The same can be said for the rural areas, especially those in the eastern part of the department where there were few official events but residents nonetheless were highly involved in the ECC.

Youth, students — Certain observers considered that youth, and notably students, were less invested in the year than they could have been. The survey of residents shows that age was a factor when it came to satisfaction (young people were less satisfied than older people) but that participation wasn't correlated with age. Because of the same lack of data, it is impossible to clarify this issue.

Even so, school groups were mobilised in a massive fashion and at the mid-point of the year 236 000 students had already been mobilised[64]:

→ 86 000 secondary school students were involved in a specific project initiated by MP2013;

→ 60 000 primary school students in the Bouches-du-Rhône participated in an outing or a project associated with MP2013;

→ 20 000 post-secondary school students in the Bouches-du-Rhône were involved in an outing or project associated with MP2013[65].

The students mostly visited exhibitions (notably the *Ulysses* project, the series of exhibitions linked to the themes of science and culture) and sites like museums, or participated in the major events of the year (*TransHumance*), but there were also specific events: for example, the *Archimed* project invited 60 classes from both general and technical schools outside of Marseille to come to the city and discover its cultural riches; the *nouveaux collectionneurs* (new collectors) offered younger students the opportunity to practice their artistic eye and build an art collection for their school; there was also *Zine 2013*, an online journal created by secondary school students from across the department.

[62] AGAM, MAGE study of major events in public spaces.

[63] According to Flux Vision, but not according to AGAM.

[64] There are roughly 540 000 students in the Marseille school system (both primary and secondary). Final figures weren't available to confirm the total level of involvement.

[65] Source: Marseille Provence 2013, French report 'Relations avec le milieu scolaire', Report in progress.

The volunteers — Finally, the 3 000 volunteers in Marseille formed their own specific audience. Without any study concerning them, it is difficult to know to what measure the volunteers appreciated the performances and events they attended. Whatever the case, observations by researchers at Aix-Marseille Université provide evidence that a certain number of volunteers were indeed appreciative of the events they attended.

Modes of participation

Many cultural actors insisted on distancing themselves from the attendance numbers for the ECC in order to emphasize the deepening of their relationship with their audience, the impact of their projects on their audience, or the degree of audience participation:

It is important that there are audiences, that the cultural world isn't just for a cosseted few. But a sort of "number-mania" is being put in place. If you have less than 400,000 spectators, you don't exist. The questions of quality, meaning, have been overshadowed by a war of images that favours passive crowds on the Vieux-Port, but for the opening ceremony, if I was overjoyed by the social aspect, I wasn't very enthusiastic about what I saw. It isn't easy to involve audiences in something that truly moves them, something that doesn't just leave them merely spectators. And for the moment, it is rare[66].

These sorts of criticisms can be generally divided into two types:

→ Events held in public attracted a large audience but didn't provide enough meaningful content:

[...] Once the surprise of discovery was over, night fell and the crowd became thicker, the mad creativity of the Carabosse company was pleasantly extinguished, drowned by both the vast space it was supposed to fill and by the continuous flood of visitors ... In these conditions – unless you had the privilege of being invited to the event for VIPs/partners/corporations that had a view overlooking the event – it was difficult to appreciate the poetry of the walk, which, in certain sections, became nothing more than a trampled slog or a crossing of a desert[67].

→ Certain events involved few people but created a deeper level of audience investment and had a more profound impact on participants. Notably, this observation was made by social services organisations, in particular those linked to the regional government which prioritized projects in the disadvantaged neighbourhoods:

What took place with a few of the Quartiers créatifs, or with the Merlan, etc. with local projects, projects that created links between residents and artists, the world of daily life and the world of art, but whose effects can not be measured in a quantitative fashion[68].

It is also interesting to note that 4% of residents who participated in at least one ECC event said they did so "in the role of contributor" (3% of all residents). By applying this proportion to the population of the department aged 15 and older, roughly 50 000 people were involved as contributors to some degree.

[66] Source: Pierre Sauvageot, in the French article "L'espace public se doit d'être critique", Olivier Bertrand, Libération, 19 September 2013.

[67] Source: the French article "Marseille-Provence 2013: Marseille attend toujours d'être bluffée par sa capital", Télérama, 13 May 2013.

[68] Source: Sylvia Girel in the French article "Une forme d'appropriation de MP2013 a eu lieu, même à travers la contestation", by Elodie Crézé, Marsactu, 30 December 2013.

The contribution of MP2013 and other factors

The contribution of MP2013

The dynamic of the ECC — Half of the attendance, calculated by the number of visits, was the result of a dozen events and sites linked with the ECC. The events held in public spaces represented 18% of visits, the MuCEM 18%, the Friche La Belle de Mai and certain major exhibitions each accounted for 3% or 4%.

This attendance owed a lot to the general dynamic of the year, both the phenomenon of the massive public interest that the ECC generated but also for having accelerated or facilitated the completion of many long-standing cultural projects such as the MuCEM.

This dynamic also provided a boost for local cultural actors, some of which were well established, by providing them with the benefit of publicity (via MP2013, but also as a result of increased media coverage) that exceeded the standard amount of attention these groups received. Certain members of the cultural community spoke of an "acknowledgement of the local scene" and the sense that it had been legitimized by the ECC. Many local cultural actors also emphasized the role of the Pavillon M, the unique building built in downtown Marseille that served as the portal onto the ECC and both provided general programme information and promoted specific projects.

The Off, which was a direct result of the ECC dynamic, also contributed to this increased awareness by showing that the territory could host both the official programme as well as an alternative programme. Recall that this was the first time an ECC featured an Off, which was seen as an "unexpected positive event" for the year.

At the same time, it is likely that increases in national and international visitors observed by the cultural organisations can also be credited to the ECC dynamic as it stimulated tourism as a whole (see Q2).

Programming — The programming for the ECC elicited very different opinions from those involved in the year, which doubtlessly reflects both intrinsic questions of culture and those parties' own perspectives on questions of culture (and what they consider to be culture or not). The programme was criticized for being both too elitist and too mainstream, which tends to show just how diverse the offerings were.

Several elements might have contributed to the successful attendance figures for this programme:

→ First, the emphasis on events in public spaces with a small number of public events with extremely high visibility, which led to the massive participation of audiences, even if at times this was criticised as superficial. The MuCEM, the new 'monument' of Marseille, played a similar role as it could be visited without entering the actual exhibition spaces;

→ Next, the focus on events such as circus and street arts also facilitated the participation of the general public, certainly in much smaller numbers in comparison to the previously citied events but with a greater individual involvement. More broadly, the diversity of the programme allowed a greater number of expectations to be met;

→ Finally, the duration of the ECC and the ensuing publicity linked to this, had a double impact: first, it allowed people, and tourists in particular, to plan their visits and include ECC events in their itinerary; and second, it led to a growing popularity as the more the ECC appeared to be a success, the more people, residents in particular, wanted to participate in at least one event.

Two hypotheses reflect the opposite scenario:

→ The limited rap programming contributed to marginalising the youth participation. This is possible, but as mentioned above, we don't have the quantitative elements to show a low participation rate among youth, in particular among young residents of the territory, so as a consequence it is difficult to establish the role of the programme in this question;

→ The promotion by MP2013 might have failed properly to communicate the programme, as many cultural actors implied. These criticisms are mainly directed to the public relations efforts directed toward residents of the region and toward those who are regular attendees of cultural events. In truth, our poll of residents showed that two thirds of people felt they were sufficiently informed of events, a number that is actually quite high[69]. On this point, the extensive media coverage of ECC, in particular by the local press, seems to have largely addressed the issue of awareness. However, people who were less likely to participate in cultural events prior to the ECC were also the people who felt the least informed of events, which leads to the conclusion that the communication strategy was mostly oriented towards people who were already interested in the arts.

Public access — As indicated earlier, the question of public participation in the events, in particular that of people from disadvantaged areas or who don't normally attend cultural events, was one of the objectives set forth by MP2013. According to our surveys, more than 50% of cultural actors considered that Marseille-Provence 2013 pushed the cultural community to address the issue of accessibility for all people, even if this was already normal practice for a significant number of organisations that ran projects.

The willingness to accommodate all members of the public wasn't enough to ensure the desired levels of participation, in particular in cases where prospective organisations or audiences weren't normally given such attention. This was true for the MP2013 projects, but also with structures that had been in place longer such as Friche La Belle de Mai or the Merlan, both of which ran into dialogue problems despite their history.

Another difficult factor when trying to create deeper involvement was the time required to make contacts with neglected audiences, then build a relationship, then produce a joint project. Even though the project was launched in 2011, *Quartiers créatifs*[70] encountered this problem:

We weren't given enough time to run our project. The discussion with residents was done in two days, in a really quick manner. It was a little bit of a failure on that level, but we didn't have a choice. We put in place an exhibition, ways to refer to these sorts of things, and then we opened conversations on the subject in the following months. A few things changed and the city planners can't ignore that. (Les Aygalades).

The project started with an "immersion, an empathy with the residents". Here, there was a fierce territorial dispute. The announced "residentialization" of the neighbourhood, in reality, changed the way the public space was used. (Plan d'Aou) [71]

Finally, locating projects in disadvantaged neighbourhoods seemed to be an obvious step, but this alone wasn't enough to reach the actual residents. The GR@2013 and the art picnics were cited as prime examples of projects that suffered this problem:

The picnics were intended to let us rediscover the landscapes near where we lived. Yet there were very few residents from the neighbouring housing projects. It cost 15 euros to attend a picnic and the participants were mostly tourists or people from downtown[72].

Volunteers — According to Sylvia Girel, who studied this sector, the participation of volunteers in events had an interesting impact in terms of opening them to new perspectives on culture.

[69] It should be noted that the criticisms regarding the communication strategy overwhelmingly involved the early part of the programme, known as Episode 1, even though the surveys were conducted at the end of 2013 and in 2014.

[70] The Quartiers créatifs programme implanted artists and cultural groups in areas that were considered culturally neglected, including in neighbourhoods of Marseille, Martigues, Istres, Salon-de-Provence, La Ciotat, Arles, Aix-en-Provence, Vitrolles, and Aubagne.

[71] Source: The French article 'Le sens des quartiers créatifs ', in the journal 'Le mouvement', pgs. 9 and 13. http://www.mp2013.fr/wp-content/uploads/2011/10/001-004-TAP-QC-final.pdf

[72] Source: French article, 'Un déjeuner sur l'herbe à Marseille', Libération, 4 October 2013.

It is helpful to remember that only a few thousand volunteers were recruited by the city of Marseille to help with the ECC Marseille-Provence 2013, which provides context for their role in the total attendance figures for they year[73].

The mobilisation of partners

Mobilisation of local governments — As a result of their involvement in ECC, local governments made a major contribution to ensuring all residents had equal access to the year's events.

In particular, the massive mobilisation to get **students** involved in the ECC was a result of efforts by the regional council, the general council, the city governments, and the school boards. In Marseille, 72,000 kindergarten and primary school students were involved in a visual arts project where schoolchildren were asked to draw their neighbourhood (*Les écoliers dessinent leur quartier*). At the same time, the city provided additional financial support for projects with educational purposes that were proposed in schools within the ECC framework[74].

Certain jurisdictions also made diverse efforts to ensure events were more accessible:

→ by making the events free: this was the case with the jurisdiction of Communauté du Pays d'Aubagne et de l'Étoile that made entrance to certain exhibitions free for all residents (for example *Picasso, Ceramist, and the Mediterranean* (*Picasso Céramiste et la Méditerranée*);

→ by providing transportation, notably in disadvantaged neighbourhoods, so residents could attend events: in Aubagne, a special bus service was put in place for Bizet's *L'Arlésienne*[75]; the regional council also used an amplified version of this service for cultural events (8 000 people used the transportation service *Treize en Partage* in 2013); the city of Marseille also launched a similar transportation service in 2013, *Escapades culturelles*, which had 5 000 users;

→ more generally, in numerous cities and towns (Martigues, Istres, Aubagne, Aix, etc.) social services groups and community organisations worked together to bring residents from all neighbourhoods to the emblematic events of the year.

The volume of these initiatives remained limited compared to the overall attendance figures for the year, but in terms of social mediation it was still an important effort and it also was a concrete contribution to providing more diverse audiences.

Mobilisation of major businesses — The major businesses that were mobilised for the ECC (see Q2) used the events as a way to build team spirit and invest in their employees. Among the initiatives:

→ free tickets were distributed for performances and exhibitions;

→ employees were encouraged to pursue artistic activities and in certain cases this resulted in performances;

→ the Ateliers de l'EuroMéditerranée played an important role in bringing together companies, employees, and artists.

Overall, business partners ensured their employees were highly involved in the ECC as a result of these sorts of programmes.

Other factors

Expectations of the local population — Although the project was poorly perceived before it opened, the expectations of the local population when it came to both cultural and community activities were actually quite high. The large number of people attending the opening ceremony bears witness to this.

[73] It should be noted that Marseille-Provence 2013's 3 000 volunteers were actively involved in the ECC so it is difficult to compare this with the 18 000 ambassadors recruited for Lille 2004, who supported the project but did not play as active a role. According to information from Lille 2004, "several hundred people served as a volunteer on at least one occasion during Lille 2004 events.' (p. 4).

[74] Source: The French report 'Rentrée scolaire 2012-2013', press package, pg.4: http://www.marseille.fr/epresse/documents/thesaurus/documents/28976/0409rentreesco.pdf

[75] Public transportation is free in Aubagne.

Even if this factor is one of the last to be discussed, it likely played a major role in the successful attendance figures.

Reluctant portions of the population — Certain sectors of the population were not interested in the ECC or, in certain cases, were outright hostile to cultural events or the institutionalism of culture. Contemporary art, in particular, elicited negative reactions in certain cases, such as, for example, when the *Ulysses* contemporary art project made a stop in Aubagne.

Transportation difficulties — The difficulty in moving around the territory, in particular the lack of transportation options in disadvantaged neighbourhoods, made it hard for some people to attend cultural events. This was particularly evident with the major events held in public spaces in Marseille: people from the Quartiers Nord, the northern neighbourhoods poorly served by public transportation, were underrepresented in the audiences. Overall, despite the expanded hours for the metro, the investments in transportation essentially covered the downtown area, which was already well served, and not the neighbourhoods with greater transportation needs (see below).

Media coverage — There was a large amount of media coverage of the ECC, in particular at the start of 2013. The emphasis on the major events doubtlessly contributed to their high attendance levels.

PRINCIPAL OBSERVATIONS REGARDING PUBLIC ACCESS TO THE ECC

• With 11 million visits, there was a high level of participation in the year and it exceeded expectations. Three quarters of the department's residents participated in at least one event. Overall, people were satisfied with the year, particularly older people and people who regularly attended cultural events prior to the ECC.

• Half of all attendance was concentrated on a dozen major events; but the remaining 98% of projects still counted more than 5 million visits. Overall, the cultural organisations were satisfied with attendance at their events. The dynamic of the year, along with the publicity efforts, benefited the majority of organisations.

• Without a global study before and after the year, it is difficult to create a true portrait of the audiences for the ECC. People already interested in culture made up a significant percentage and the professional classes were also overrepresented.

• All the same, half of all cultural organisations considered that their audiences for ECC events were more diverse than usual. This could be a result of new measures taken by the organisations, which were encouraged by MP2013. Events in public spaces also played a major role, except in areas where there were fewer public transportation options.

• The investment by local governments in terms of social mediation and the massive involvement of schools were also important factors.

WERE THE PRACTICES OF LOCAL CULTURAL ORGANISATIONS CHANGED FOR THE LONG TERM?

In this part, we analyse the long-term changes in the practices of cultural actors who were involved in the ECC in the context of their projects, skills, and strategic positions.

What happened

In principal, there is a level of uncertainty surrounding any possible long-term changes in the functioning of an organisation and in this section we look essentially at the accumulation of skills acquired during the year. The uncertainty regarding these changes, and the current opportunities for these organisations, are discussed in the following section.

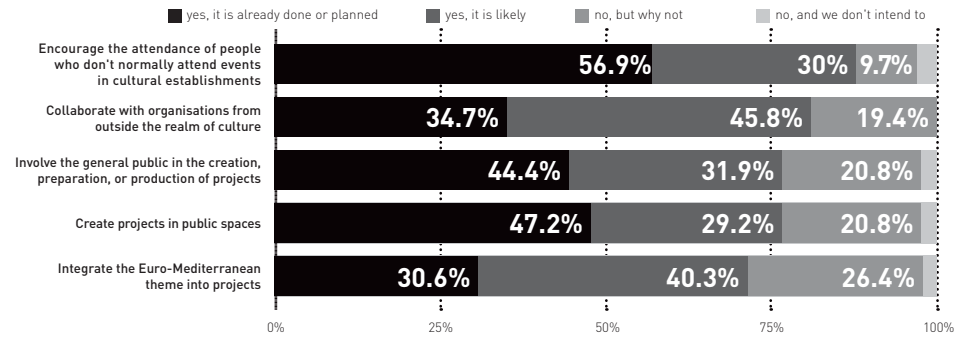
Changes within projects

One vector for change is the financing of projects within the framework of the ECC because six out of ten projects were conceived to be permanent or repeated in the future according to the organisations surveyed (this rises to 3 out of 4 for branded projects). Currently, 35% of these projects already have the means to continue while 60% are still searching for financing that would keep their project going and only 5% have been abandoned. Several of these projects have already gone on tour in Europe or through the Mediterranean basin. This indicates that the evolution of the project seen during the lead-up to the ECC was maintained in some way.

It is also worth nothing that cultural actors also wished to integrate the goals of MP2013 into their future projects[76]. This is particularly true in terms of accessibility for all audiences and partnerships with structures outside the realm of culture, goals that organisations have continued to pursue in, respectively, 57% and 35% of cases.

The theme of the Euro-Mediterranean inspired less interest: those who were already involved in this area continued to be so while those with other perspectives were less interested in this theme.

Figure 19: In the future, do you think you will ... (n=72)



Changes in attitudes and practices

The strategic capacity of the cultural actors — As indicated earlier, the skills acquired by organisations during the course of the year were for the most part used again. Beyond this, observers and members of the cultural community emphasized that they had acquired the capacity to create medium- and long-term strategies, as well as the ability to tailor their projects to benefit from the ECC by growing and gaining greater visibility. Cultural actors also indicated they hoped to maintain these advantages after 2013.

This investment doesn't seem to have been risk-free, in particular when organisations concentrated their efforts on 2013 without taking into account what would come next:

The end of the (art centres) Bureau des Compétences et des Désirs (BCD) and the Atelier de Visu are oddly similar: the first, part of the cultural community in Marseille for 20 years, the

[76] As previously indicated, these practices could be a result of the ECC or merely standard practices for the cultural actors.

second for more than 15 years, closed as a result of insufficient resources. All the eggs were put in the same basket in 2013 and the source dried up. According to Yannick Gonzalez, the BCD was incapable of continuing its projects, notably with Fondation de France for whom he had been an authorized mediator since 1997: "The Nouveaux commanditaires programme put us in a unique situation because it wound down over the course of two or three years. Added to this was the major activity of 2013 that mobilised the entire structure and required us to increase the size of our team. It was like a speculative bubble: we had to concentrate the entire efforts of 8 people without having a moment to think about 2014. Now, the expenses are greater in 2014 but the governments only give us the same subsidy as in 2012."

The same observation was made by Soraya Amrane, the director of the Atelier de Visu: "With the region announcing a 20% decrease in subsidies, the situation wasn't going to get better. I didn't have any increased budget for 2013 except for two projects (the Wortex workshops and Mathieu Pernot exhibition at HLM). Nothing for operating costs. So I had to tell my patrons that despite their moral support and their recognition, I couldn't go on."[77]

Nevertheless, for the MP2013 association it is difficult to attribute these closures to the ECC or the fact that they had to co-exist with the ECC.

Continued collaborations — For many, the ECC was proof that it was possible to unite a diverse collection of interests across an extended territory in a functional manner[78]. The year also allowed certain tools to be put in place that facilitated compromise between organisations: multilateral or bilateral exchanges and arbitration processes through the Prefecture or the MP2013 association. These sorts of processes should be embraced by the different participants for the long term.

If the means to maintain this type of governance have not yet been found, a certain number of collaborations and partnerships seem to be enduring.

There were four types of collaborations:

→ Between governments:
• There were several instances of cooperation, at times informal, that occurred, such as with the G6[79] or the workgroups initiated by the city of Marseille regarding museum plans and contemporary music or the public reading programme with the national, departmental, and regional governments[80] or the Joliette J4 club. In these groups, there was a willingness to share information about programming and cooperate on transportation issues.
• Within the Communauté du Pays d'Aubagne et de l'Étoile, the preparation and management of the year reinforced the working relationship between the various municipalites within in the agglomeration;
• The departmental government also greatly reinforced its collaborative process with local governments as a result of the programme. The *Treize en partage* programme aims to maintain these new relationships.

→ Between local governments and cultural actors:
• Certain projects that were created in partnership between local governments and cultural actors (the *Grand Atelier du Midi* and *Ulysses* were often cited as examples) set a precedent in collaboration and could lead to similar initiatives in the future. More broadly, local governments expressed the desire to invite artists and companies who took part in the ECC back to their jurisdictions (for example, the companies from the *Cirques en capitals* project).
• The box office receipts agency, created to manage event ticketing for most of the participating governments, seems like it will be maintained.

→ Between cultural actors: members of the contemporary art community, who initially had difficulties when coordinating efforts, continue to meet collaborate.

→ With members of the business community:
• The major companies who entered into partnerships with the cultural world had positive results and hope to continue collaborating. Many of the companies involved in the *Ateliers de l'Euroméditerranée* project hope to continue this experiment.
• Finally, the territory's major economic organisations, which were an engine of collaboration (see Q2) hope to continue with programmes to exchange ideas and perhaps discuss new projects for the territory.

[77] Source: "Bérézina annoncée", French article in Zibeline, 17 September 2013.

[78] Source: Presentation by the Pilot Committee, 22 January 2014, 'Mission d'analyse des coopérations mises en œuvre lors de la CEC MP2013', CNFPT, p.5.

[79] The term 'G6' designates the informal collaboration on issues between the following cities: Arles, Istres, Martigues, Salon, Gardanne, and Aubagne. Initially launched to deal with water issues, the cooperation was continued within the framework of MP2013 with Festins de la Méditerranée, a project that has since been maintained.

[80] Source: Presentation by the Pilot Committee, 22 January 2014, ' Mission d'analyse des coopérations mises en œuvre lors de la CEC MP2013, CNFPT', p.9.

Analysis of implemented policies — As part of the ECC or as a result of the ECC, many local governments examined their policies regarding culture in their jurisdictions, notably the regional government, the departmental government, and the cities of Marseille, Arles, and Aubagne.

It is also true that all the governments aren't at the same stage in terms of their cultural strategies. Marseille in particular seems to have been forced to play a game of catch up compared to other cities that have strong cultural traditions such as Arles or Aix. As one of the major cultural organisations in the territory noted:

The infrastructure is the first step, after which we will implement a strategy.

Yet, the post-2013 strategy remains limited, notably having been delayed as a result of the municipal elections.

According to those involved in the process, three important elements should be implemented, though they also believe this is to be highly unlikely:

→ The creation of a territory-wide cultural strategy that would provide common goals and support a complementary approach between governments as opposed to a competitive one. As the university researcher Boris Grésillon indicated:

There is an exceptional range of cultural offerings in the greater Marseille region. The problem is that they are spread over a broad geography, they are dispersed; there is also a sense of competition that sometimes sets one organisation against another [...] Another problem today is that each city or town wants to have its own museum or performance hall [...] For its part, Aix envisions adding a new facility for contemporary music without any concern for organisations in Marseille that possess a true savoir-faire in this domain[81].

→ The creation of a system of cultural governance that would have a role for all parties, including
the cultural actors themselves, and which would facilitate cooperation and compromise.

→ The creation of the post of cultural coordinator, which would be a fluid position (either a central operator or individuals in each local government), who could harmonize strategy for major events or more specific performances.

Until such developments occur, the six governments of the G6 (Istres, Martigues, Salon, Arles, Gardanne, and Aubagne) still hope to continue their work and extend their collaborations.

The cultural organisations have also clearly expressed their desire to be part of the process if a territory-wide cultural governance is put in place.

It should be noted that when considering what happened in other capitals, such as the case of Vilnius 2009, one should be cautious when it comes to any long-term changes. The continuation of the project isn't assured and efforts must be made to maintain the cultural gains:

We can see examples of new and long-term cooperation between different cultural organisations, but they are limited in number and culture doesn't hold a greater place than before in terms of the political agenda[82].

The contribution of MP2013 and other factors

When assessing their prospects for after 2013, there are many causes for uncertainty for the cultural actors that, in their eyes, limit their abilities to take advantage of their new or strengthened capacities.

The question of ambition — For certain of the cultural actors involved in the ECC, and for the management of the association itself, the legacy of the year will be to have heightened ambitions for the territory's cultural landscape, whether it be the themes addressed, the capacity for new cooperation, or the setting of new goals. The ECC demonstrated that it was possible to push cultural actors and local governments to broaden the horizons of what is possible; meanwhile the experience these parties acquired during the production phase strengthened their capacity to achieve these new ambitions.

Good will — Numerous parties, among them the technical teams from the local governments, appreciated the collaborative aspect of the ECC and wished to maintain these working partnerships, both inter-governmental and between governments and cultural actors. Important figures from the territory, in particular the chamber of commerce and representatives from the national government, are also pushing for this dynamic of cooperation to be maintained.

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[81] Source: the French report 'Marseille-Provence 2013, analyse multiscalaire d'une Capitale européenne de la culture', already cited.

[82] Source: The report 'Évaluation ex-post des Capitales européennes de la culture 2009' by ECOTEC, p. 11.

[83] According to the national government, culture, tourism, and sports programmes remain essential and shouldn't be affected by new policies.

[84] This is the current case for the MuCEM.

[85] Source : Budget primitif 2014, p. 48-49.

Territorial reform — The current political reforms regarding the role and financing of both local governments and national institutions across the territory have introduced a level of unease. This is mostly connected to the reduced funds that will be available to local governments in the future and the budget decisions they will have to make in order to ensure essential services. Many organisations fear that these decisions will be unfavourable for culture in general[83] and the financing of local semi-professional structures in particular.

Municipal elections — The municipal elections of May 2014 created uncertainty on two levels:

First, the decision-making process for local governments was frozen during the elections, meaning they were hampered in their preparation of a cultural strategy for after 2013. Certain initiatives that were well underway at the end of 2013 were actually blocked.

Second, numerous members of local governments who had worked with the ECC and formed relationships with cultural actors were replaced during those elections. Aubagne, the fifth-largest city in the department and one that was heavily invested in the year changed its majority. This was also the case for Salon-de-Provence, Châteauneuf-les-Martigues, Lambesc, Cabriès, and Port-Saint-Louis-du-Rhône. The presidency of agglomeration Marseille-Provence Métropole and the Communauté du Pays d'Aubagne et de l'Étoile also changed.

At the heart of these governments, the public servants who developed these collaborations need now to convince the newly elected politicians that these programmes are important, a process that could take months and doesn't have any guaranteed outcomes.

Cultural financing — As previously indicated, the financing for the EEC MP2013 was actually quite limited compared to the overall budget committed to culture across the territory.

Yet today it is no longer certain that this non-MP2013 financing will be maintained by local governments. Certain governments have indicated that even if the budget will be the same, it will have to be spread thinner to support new structures such as the MuCEM. These new structures develop their own programmes, which may or may not involve cultural organisations from the territory[84]. What local cultural actors fear, especially the smallest among them, is losing the financing for their operating budgets that allow them to develop their own projects. And, of course, these very operating budgets are essential to the preservation of the professionalism observed in 2013.

In Marseille, the budget dedicated to culture remained stable in 2014 (it accounted for a little less than 10% of the overall budget) but here too there are now additional expenditures required as a result of the new organisations that opened in 2013. According to the mayor's office, a process of evaluating and adapting the existing methods of cultural intervention is already underway, which will determine how cultural funding will evolve:

The methods of supporting the fabric of cultural associations will evolve progressively to take into account both the change in the cultural landscape in Marseille as a result of Marseille-Provence 2013 and recommendations from the external Office of Evaluation of Public Policy that was commissioned by the City to consider public support for cultural activities.

Cultural organisations are encouraged to restructure their year around seasons, a process led by institutions (the Criée, the Théâtre du Gymnase, the Toursky, the Théâtre de la Joliette, the Friche La Belle de Mai…) and the emblematic festivals[85].

In a general manner, the budgets dedicated to investment in culture, which greatly increased between 2008 and 2012, are slowing coming back down to normal, even though the work on the cultural infrastructure is scheduled to last until 2020 (see annex).

The closing of the association — The MP2013 association played a pivotal role in the production or co-production of events, and also in creating a network between cultural organisations (see above). The general dynamic of the year also pushed these organisations to consider their long-term future:

For once, we were obligated to work together to plan several years in advance, whereas people in the cultural milieu often work in isolation and from day-to-day.

However, in 2014 the association was legally closed. The partnerships and bilateral collaborations it initiated are thus lost (to the contrary, the multilateral collaborations may well survive without the association).

PRINCIPAL OBSERVATIONS REGARDING LONG-TERM MODIFICATION OF PRACTICES

• MP2013's imprint on cultural projects might be maintained in the future: in fact, the involved cultural actors indicated they are continuing or hoping to continue making their work more accessible to all audiences and collaborating with their new institutional or community partners.

• For many, the ECC also was proof that it is possible to bring together a great number of diverse organisations and individuals from across a broad territory to collaborate in a successful manner. If specific methods of any future global cultural governance for the territory are not yet in place, there are numerous examples of more limited collaborations between governments or between governments and cultural organisations that should continue.

• The ECC also pushed certain local governments to engage in a process of reflection regarding their cultural policies that could have consequences in the years to come. The role of MP2013 most notably was to show that it was possible to be ambitious.

• On the other hand, there remain numerous uncertainties, in particular in terms of the financing of cultural events and the political landscape of the territory in a period of reform. Finally, the closing of the association, which allowed for communication and collaboration between members of the cultural community, will complicate the pursuit of the year's stated goals.

CONCLUSION: WHAT WAS THE IMPACT ON THE PRACTICES OF CULTURAL ACTORS?

CONCLUSIONS (Q1)

1. Despite the numerous problems that arose, the call for projects contributed to a broadening of participation in the ECC to include smaller structures and more jurisdictions.

2. By allowing cultural actors across the territory to engage in unaccustomed projects, the ECC helped increase their skill sets and developed new and potentially fruitful working relationships.

3. The ECC encouraged a selection of the territory's cultural actors to embrace new policies that favoured the diversification of their audiences, notably by pushing them to try different methods (partnerships with community or social service organisations, holding events in public spaces, public participation in the conception or implementation of a project).

4. The ECC is one of the factors that facilitated an amplified relationship between cultural actors and their audiences, partly due to the general dynamic of the year but also as a result of supplementary publicity campaigns for local organisations.

5. The events held in public spaces were probably the principal means of increasing the participation of residents, except for neighbourhoods far from downtown with limited options for public transportation (notably the northern districts of Marseille).

6. For disadvantaged neighbourhoods, the fact that local governments engaged in social mediation helped partially offset the symbolic and physical barriers to culture in those areas.

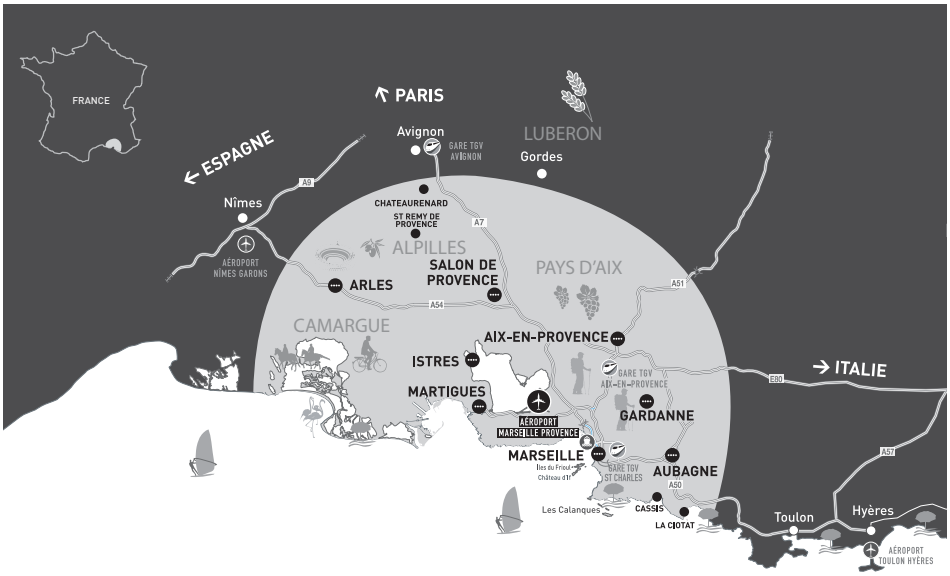
7. Changes in the practices of organisations that were observed (accessibility for diverse audiences, partnerships, collaborations) should be maintained, at least to the degree that financing remains available for future projects.

8. The ECC was proof that it was possible to create a collective project of great ambition. Although there is a push for the advances in cooperation to be maintained, the current collaborations remain sporadic and are limited by the institutional and financial uncertainty that weighs on the territory.

Q2: In what ways did the ECC MP2013 influence the image and appeal of the territory?

The previous chapter of this report discussed the various elements required to answer the question of how Marseille-Provence 2013 influenced the evolution of the practices used by the cultural actors in its territory. The current chapter is interested in the contribution of the European Capital of Culture (ECC) to improving the image and increasing the appeal of the region. Here, the impact might be less direct and not as immediate as in the previous section, but it should nonetheless contribute to making the changes sustainable in the long term.

Figure 20: Marseille-Provence territory (Source: MP2013, 2011)



It is helpful to first address the concept of appeal used for this report. It can be defined in the following manner: the appeal of a territory (a city, a jurisdiction, etc.) is its ability at any given moment to attract economic interests (investment, employees, etc.), residents, or tourists.

Next it is important to determine how the European Capital of Culture may have affected the appeal of the territory where it was held. By relying on the five impact measures presented in the introduction (see Inset , p.14), the following answers can be offered:

→ First, by **the general dynamic inspired by the candidacy and the selection of Marseille as the European Capital of Culture**. Beginning in 2008, this dynamic may have created long-term relationships between members of the cultural community, the economic community, and public institutions, as well as an awareness of the project's themes and a common discourse on the utility of the ECC as a vector for economic development.

→ Next by the **operation of the actual ECC itself**, in particular the support offered by the economic community, that may have translated into participation from business partners, extra financing, communications and public relations operations, and the involvement of businesses means of organizing events.

→ Also by **the impact of the investments** made in parallel with the ECC, in particular when it involved the construction of new cultural infrastructure. This may have contributed to the improvement of the territory and thus may have also added to its appeal.

→ Then, an operation like Marseille-Provence 2013 may have allowed **the city and the wider territory to gain international renown**. For example, according to Lille Mayor Martine Aubry, when her city was ECC in 2004 it led to 10 years of increased awareness of her region. An ECC may result in more active promotion of the region, more media coverage, and a more positive reputation among professionals in the fields of culture, tourism, and business.

→ Finally, the various effects of the ECC, whether they were long-term or not, may have left a legacy of cultural activity and wealth after 2013.

The evaluation phase revealed that the stated goals of MP2013 were insufficiently explicit to demonstrate the manner in which the ECC may have had an effect in terms of the territory's appeal. In order to be able properly to answer this question, it is necessary to examine a chain of cause-and-effect that might illuminate the contribution of the MP2013 to an improved appeal for the territory.

The flow chart presented on the following page is based on discussions with the ECC's partners and the evaluation team's own expertise (both organizational resources and those of its subcontractors) to offer a visual schema of the mechanisms by which the ECC might have had an effect on the appeal of the territory.

Based on this examination of the possible causes, it is possible to evaluate the contribution of the ECC to the improvement of the appeal and the image of the territory in regard to seven criteria of success that are causal chains (or links in causal chains) in the following diagram:

1. Were the organisations in the territory sufficiently involved in the preparation and management of MP2013?

2. Were there more tourists in the territory during the period of the ECC MP2013?

3. Were there lasting improvements in the quality of life for residents and businesses in the territory as a result of the ECC MP2013?

4. Did organisations in the territory enjoy economic benefits as a result of contracts arising from the year or increased visitors resulting from the year?

5. Were creative and artistic talents drawn to the territory for the long term?

6. Did residents and visitors to the region come away with a better image of the territory thanks to the ECC?

7. Was the appeal of the territory strengthened for the long term?

As with the previous section, for each question we will first study the observed changes, that is what effectively happened, and then how the ECC might have contributed to these evolutions.

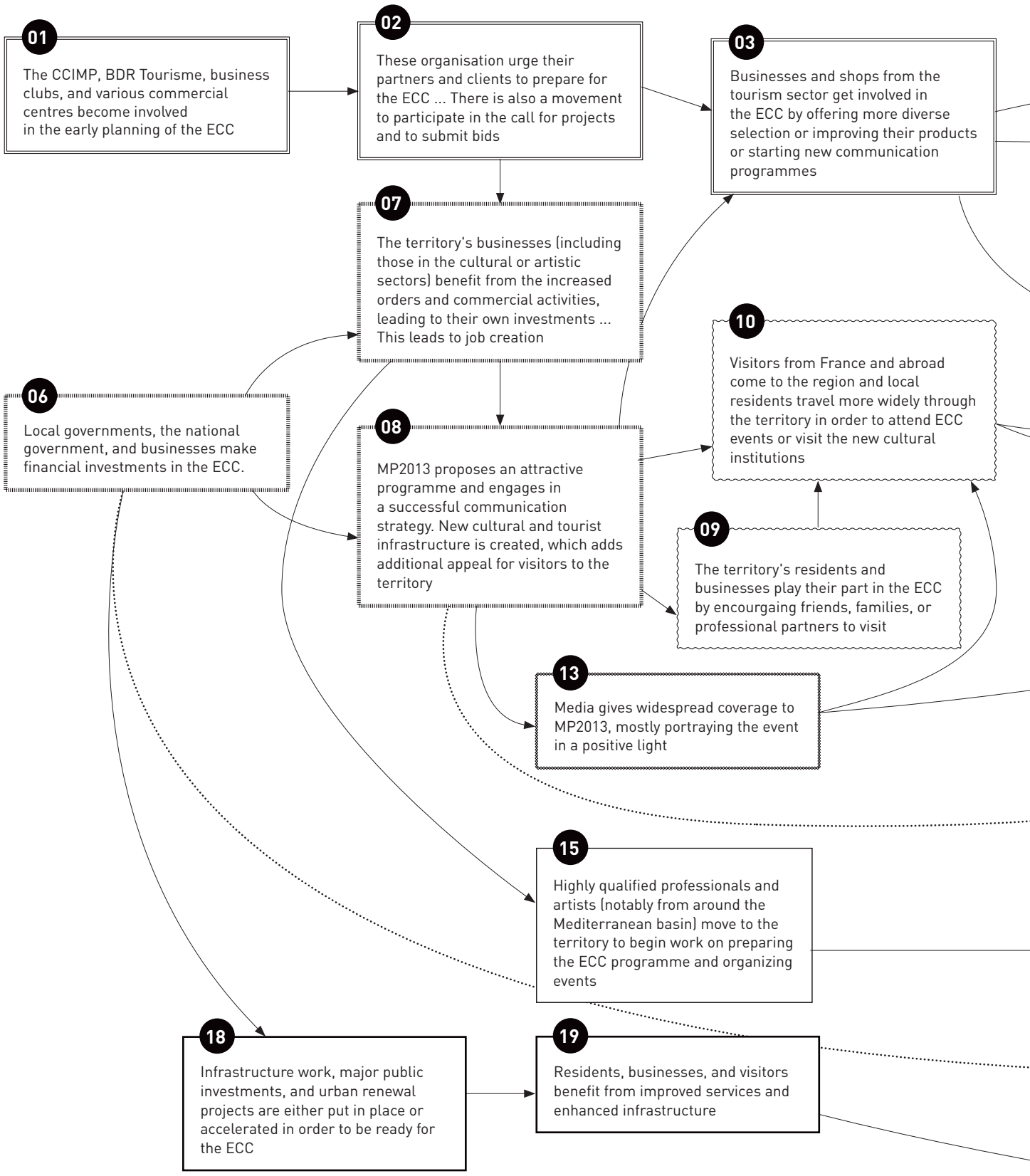
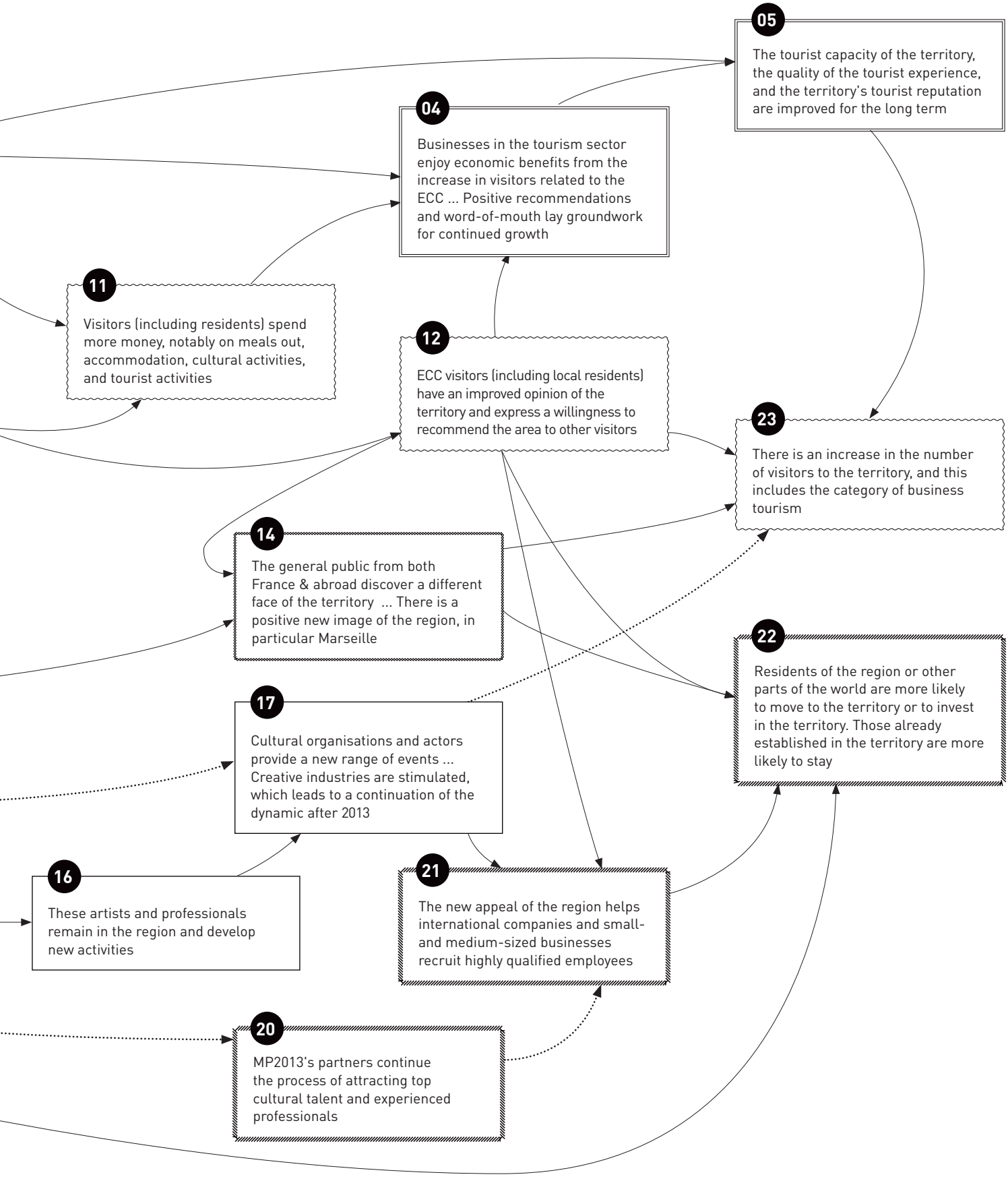


Figure 21: Flow chart presenting the possible impacts of the ECC in terms of appeal / © Eurêval-2013


05
The tourist capacity of the territory, the quality of the tourist experience, and the territory's tourist reputation are improved for the long term
04
Businesses in the tourism sector enjoy economic benefits from the increase in visitors related to the ECC ... Positive recommendations and word-of-mouth lay groundwork for continued growth
11
Visitors (including residents) spend more money, notably on meals out, accommodation, cultural activities, and tourist activities
12
ECC visitors (including local residents) have an improved opinion of the territory and express a willingness to recommend the area to other visitors
23
There is an increase in the number of visitors to the territory, and this includes the category of business tourism
14
The general public from both France & abroad discover a different face of the territory ... There is a positive new image of the region, in particular Marseille
22
Residents of the region or other parts of the world are more likely to move to the territory or to invest in the territory. Those already established in the territory are more likely to stay
17
Cultural organisations and actors provide a new range of events ... Creative industries are stimulated, which leads to a continuation of the dynamic after 2013
16
These artists and professionals remain in the region and develop new activities
21
The new appeal of the region helps international companies and small- and medium-sized businesses recruit highly qualified employees
20
MP2013's partners continue the process of attracting top cultural talent and experienced professionals

WERE ORGANISATIONS IN THE TERRITORY SUFFICIENTLY INVESTED IN THE ECC MP2013?

What happened

In this section, the methods by which the local economic community, public institutions, and residents themselves became involved in the ECC will be reviewed. Recall that the methods used to mobilize cultural organisations was presented in the first section, notably starting on page 18.

Involvement of the business community

A major financial investment — From the very beginning, the European Capital of Culture project encountered a fertile terrain in terms of the territory's business community. As early as 2003, the local association for business leaders, the Mécènes du Sud, started to focus on culture as a means of economic development. Aware of the links between the cultural environment and economic growth, these businesses leaders supported contemporary artistic creation throughout the Marseille-Provence territory.

For its part, the Chamber of Commerce and Industry for Marseille and Provence, the CCIMP, was carrying out strategic studies on the appeal and the promotion of the territory. They identified culture as one of the agents that could be strengthened in order to better attract tourists and investors.

The city of Marseille had also been engaged in a similar process. The prospect of a European Capital of Culture to be held in France in 2013 thus appeared to be an opportunity that met the shared interests of both economic and institutional actors.

In 2005, the CCIMP financed a study on the theme of "What can the business community do in regards to a European Capital of Culture?", which led to the proposition of the "1000 businesses, 1000 talents" programme, which later became the *Ateliers de l'Euroméditerranée*.

By confiding the leadership of the ECC project to Jacques Pfister, president of the CCIMP, the city of Marseille opted for a territory-wide project – that is to say Marseille and Provence and not just Marseille alone — a decision that was greeted with support from politicians across the territory as well as with the major mobilisation of the business community.

Members of the business community became even more deeply involved in the candidacy during the conception phase. They accompanied elected officials on visits to Lille, Liverpool, and Genoa to investigate previous experiences with the ECC and also went to Brussels to meet representatives of the European Commission.

When it was announced that Marseille-Provence had been designated as the European Capital of Culture, the business community once again strengthened its involvement, most notably in financial terms. At the end of more than three years of recruitment, MP2013 could count on the **direct participation of 207 businesses** that were involved at every level of partnership that had been put in place. Together, these businesses provided a contribution of **more than 16.5 M€** (compared to **the target of 14.7 M€**), or **16% of the budget of the ECC**. This sum included both direct financial contributions and the provision of goods and services. A non-negligible part of the goods and services offered— **roughly 2 M€** — didn't correspond to the initial budget lines of the association, but was nonetheless helpful in the execution or promotion of the ECC[86].

The major businesses in the department, especially those with historical ties to the territory, were especially active (8 of the 12 largest businesses in terms of total revenue were partners of MP2013). Overall, 14 businesses were responsible for 76% of all financial support in terms of sponsorships.

[86] Source: Sponsorship report from Marseille Provence 2013, pg. 4

The system put in place by MP2013, with sponsorship categories starting as low as 1 000 €, was considered highly accessible and ultimately led to a broad mobilisation of businesses including a **far greater number of small- and medium-sized businesses** than any previous ECC. Certain businesses progressively increased the level of their partnership, entering at the Club level, then becoming a Supporter, and finally rising to the level of 'Partner Project' (contribution of between 40 000 € and 100 000 €, see Figure 23).

Figure 22: The five official partners

Figure 23: Different levels of contribution[87]

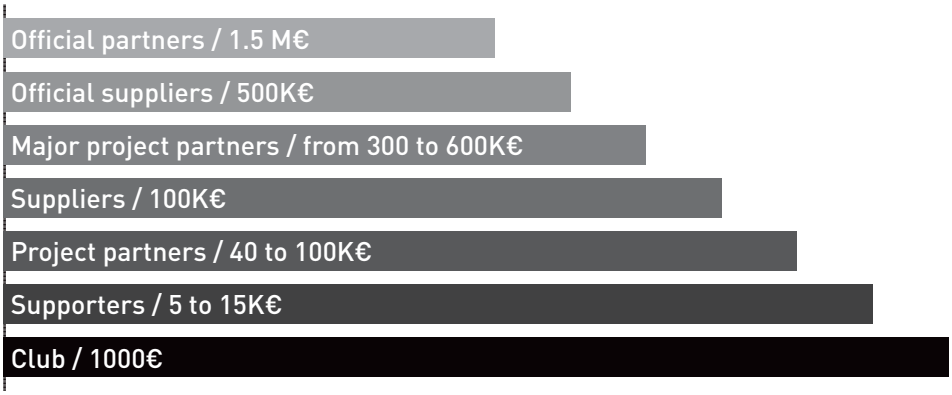
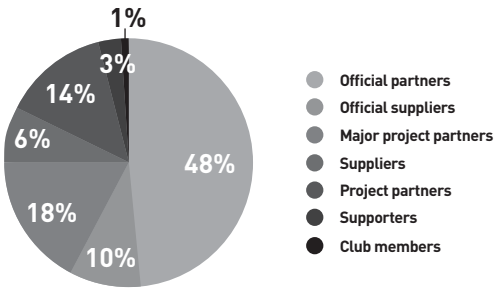


Figure 24: Distribution of sponsorship receipts by level of partnership (source: MP2013 Sponsorship report)



The size of the budget for the MP2013 association shows the financial efforts made by these different partners.

By comparison, the financial contributions and contributions of goods and services from the private sector represented on average 13% of previous ECC budgets[89]. Lille 2004 was supported by 82 business partners[90], which provided 13 million euros in support, or 17,6% of their total budget. In the case of Liverpool 2008, they generated 22.3 million pounds in sponsorships, which was the highest level of corporate support ever obtained by a European Capital of Culture[91].

Collaboration with cultural partners — The investment made by the business community wasn't limited to their financial support of the ECC. Many of them also entered into dialogue with cultural organisations, engaging in discussions and helping promote events through their suppliers and clients and through their own business initiatives.

Logically enough, businesses in the tourism, hotel, and restaurant sectors, and to a lesser level, local artisans, located in the 'touristic centres' [92] of the region were particularly apt to invest in the ECC.

THE BUDGET FOR MARSEILLE-PROVENCE 2013 COMPARED TO OTHER ECCS

The real budget for the period 2009-2013 ended up being 102.1 millions euros, making Marseille-Provence 2013 one of the largest EEC budgets, greater than Genoa 2004 and Lille 2004, which respectively had budgets of 33 and 73.7 million euros, but clearly inferior to the budget of 155 million euros for Liverpool 2008. To this sum, one must also add the 4.75 million euros for the candidacy phase, that brings the total budget figure to 106.9 million euros (52% of which was used during the capital year, 76% when you consider both 2012 and 2013)[88].

[87] In terms of the second line, (Official Suppliers), the contributions, essentially in goods and services, could be valued anywhere between 100K€ and 500K€.

[88] Source: INET report, previously cited, p.11.

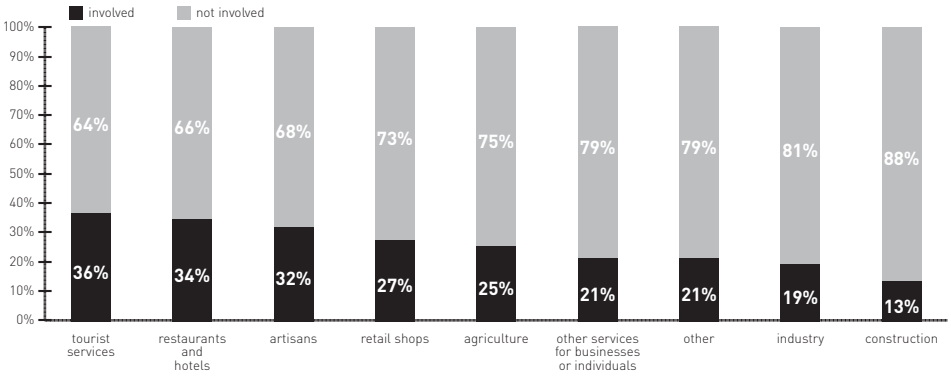
[89] Source: Palmer report, previously cited, p.11.

[90] Source: French report 'Le bilan de Lille 2004, Technique et enjeux d'une évaluation de politique publique culture', Florent Michelot.

[91] Source: Creating an Impact, previously cited, pg.XX.

[92] This involves a specific denomination attributed by the French government for tourist centres, which gives them certain rights and advantages.

Figure 25: The investment of small- and medium-sized businesses in the ECC, by sector of activity (Euréval poll of small/medium businesses, 2nd wave, March 2014, n=25[93])



The involvement of small- and medium-sized businesses in the preparation of the European Capital of Culture took several forms. There were three principal types of involvement cited by the businesses that took part in the survey:

→ Collaboration on a joint project with cultural or tourist organisations (close to one respondent out of two).

→ Acting as a partner or supporter of a project (30% of respondents).

→ Meetings with members of the cultural community (mentioned by 16% of respondents).

The adaptation of certain businesses — The territory's businesses, particularly those linked to the tourism sector, also showed a great ability to adapt to the project during this period. As an example, the hotel industry was able to rise to the occasion, providing 345 additional rooms in 2013 (bringing the total to 5 650 available rooms), and this included a number of high-end rooms in Marseille (1 929 rooms in hotels classified as either 4 or 5 stars)[94]. New businesses, including café/restaurants, emerged, transportation services introduced the *Pass Transports* system and a single ticket for the entire Bouches du Rhône department, airlines offered more choices including direct flights from Toronto, Heraklion, and Seoul, while cruise lines began to offer more stops in Marseille.

It should be noted that the survey of small- and medium-sized businesses confirmed that:

→ More than 25% recently developed new products or services (67 out of 254 respondents);

→ 25% either modernised or renovated their facilities recently (63 out 254).

A minority of small businesses and businesses in sectors such as the hotel-restaurant industry or the tourism industry:

→ More than 20% developed an Internet site or a Facebook page;

→ 10% of businesses developed their presence on crowd-sourced tourism websites;

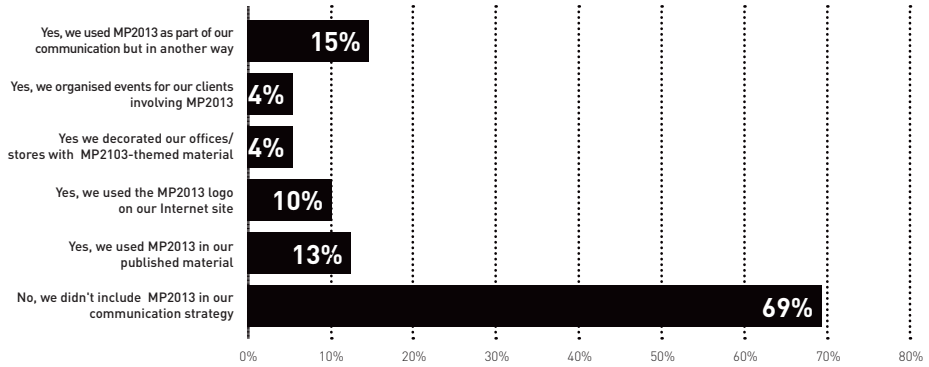
→ More than 5% tried to attract different clientele.

At the same time, almost one third of companies engaged in some promotional campaign regarding the ECC whether or not they were actually involved in the preparation or the implementation of the ECC.

[93] Recall that 'n' represents the number of respondents to the question.

[94] Source: Report from the Marseille tourism authority, 'Observatoire du Tourisme, Chiffres clés 2013', p. 15

Figure 26: Did you evoke Marseille-Provence 2013 in your communication campaigns with either your clients or your partners? (Euréval survey, March 2014, n=253)



Smaller businesses also mobilised for the event, but a little later in the process. In fact, 94% of them had nothing specific in place by the time the opening ceremony was held[95], which wasn't overlooked by the media in the following days. A lack of specific information for the target audiences throughout the territory might be one explanation for this phenomenon, as well as an initial underestimation of how many visitors would be drawn by the ECC. In comparison, Lille 2004 was able to mobilise these same small businesses with 350 of them joining the association, which provided an impressive network as these businesses acted as permanent information offices, they promoted major events in their storefronts, they created branded products in connection with events, and they often extended their business hours.

A participation in cultural projects — Finally, as could be seen in the focus groups that were organised for this report, the companies that invested in the ECC, both large and small, participated in a way that strengthened cultural activity across the territory, either by working directly with cultural actors (as with the Ateliers de l'Euroméditerranée project: 60 artist residencies were created in commercial spaces) or by helping to promote the event (publicly showing their support for MP2013 by emblazoning their fleet of cars or their buildings with messages of support, creating special websites dedicated to Marseille-Provence 2013 or even the creation of a special stamp commemorating the event) or by offering their employees and clients the chance to engage in the event (distribution of tickets, organisation of professional meetings in cultural sites).

Financial involvement of public institutions

Public institutions invested in both the MP2013 association that organised the ECC and numerous other projects that helped contribute to the year's success.

Co-financing of the association and the projects it managed — As noted by the business administration students from the French school INET:

"The size of the budget for the MP2013 association clearly shows the financial efforts made by different groups. [...] This sum represents an even more important effort for institutions that, according to their founding charters, were only able to finance new measures, without reducing existing structural budgets and while accounting for the associated costs of the different institutional services associated with the cultural endeavour (communication, police, cleaning services, technical services ...). These last expenses, essential to running the events held within the framework of the ECC MP2013, represented important sums for the different local governments as well as for the national government, even if they are difficult to evaluate precisely."[96]

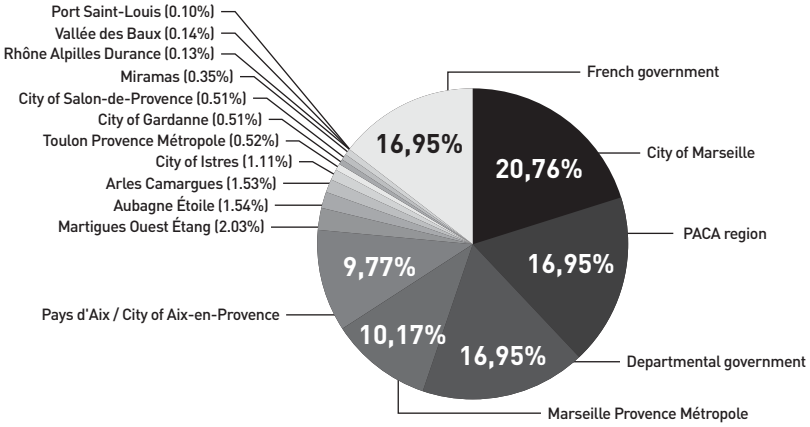
According to this same source, the financial support from the city was relatively limited compared to similar cases in the past:

The repartition of the financing provides another way to grasp the financial involvement of each of the different members. In effect, the role of central city in the budget is relatively limited compared to the budgets of other European Capitals of Culture where it generally represents a third or even half of all subsidies, as was the respective case in Lille and

[95] Source: French report by CCI 'Soldes d'hiver 2013'.
[96] Rapport INET, already quoted, p.11.

Liverpool. The contribution of 15 million euros in subsidies by the city of Marseille represented only 20.6% of total public subsidies, not including European subsidies. This limited proportion is explained by both the territory's place on the economic fragmentation index as seen in reports from the Organisation for Economic Co-operation and Development (OECD), which is two times higher in the other metropolitan areas studied by the OECD, as well as the large number of institutional partners who provide subsidies.

Figure 27: Public subsidies for Marseille-Provence 2013 (total amount not including Europe: 74.89 M€ 2009-2013, source: MP2013[97])



When comparing the amount of subsidies provided by each local government and the value of the projects organized in their jurisdiction (based on the budget used by MP2013), and without accounting for costs associated with MP2013 employees and without apportioning funds from territory-wide projects, we can see that each area received almost exactly as much as they invested[98].

The mobilisation of public institutions in the financing of investment projects and publicity campaigns connected to the ECC — Beyond their financing of the MP2013 association and their support of projects held within the framework of the European Capital of Culture, both the national and local governments chose to make important investments in related projects, notably infrastructure projects such as Pavillon M, MuCEM, the new building for the arts archive 'Fonds régional d'art contemporain' (FRAC), the redesign of the Vieux-Port, or the renovation of Fort Saint-Jean (see the table of emblematic construction projects in the annex).

Other public institutions, such as the local port authority (the *Grand Port maritime de Marseille*) also became heavily involved in the project at an early stage, mobilising funds (several million euros in work), space, material, and services in support of the ECC. Notably, it renovated the second floor of the J1 hanger in the heart of the new Joliette business sector and provided it to the association as an exhibition space. It also welcomed an artist-in-residence and artistic works within the port complex.

It should also be noted that public organisations such as Bouches-du-Rhône Tourisme and the network of local tourism offices worked with the MP2013 association in order to come up with strategies to better welcome and inform the influx of visitors.

Finally, local governments in places like Arles, Istres, Gardanne, and Aubagne chose to begin promoting MP2013 very early in the process. However, the publicity campaigns by public institutions regarding the ECC often weren't well coordinated. In effect, each local government used MP2013 material and graphics in their campaigns, but there were no joint communication tools.

Involvement of residents

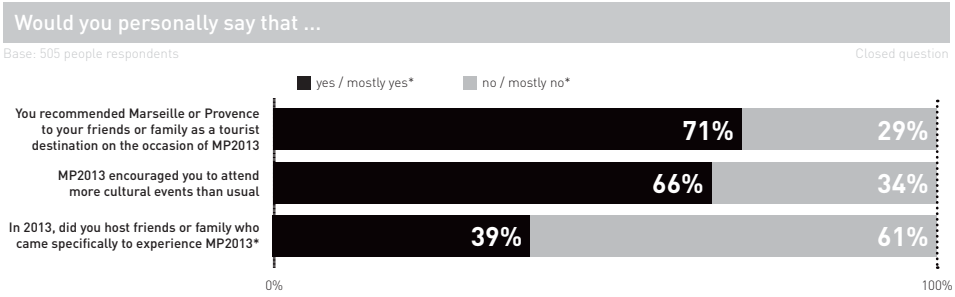
Residents also took part in the ECC, not just by attending the various events or exhibitions but also by promoting the year among their circle of friends and family who lived outside the MP2013 territory and inviting them to visit for this occasion.

According to our survey, more than 70% of residents recommended that their friends or family visit Marseille and Provence during the ECC.

[97] The European subsidies for the period from 2009 to 2013 were 2.8M€, of which 1.5 M€ came for directly with the ECC designation (the Melina Mercouri prize), and the rest from ERDF (European Regional Development Fund) for the Quartiers créatifs programme.

[98] A median return rate of 96% for the eight largest financial investors among local governments and an average return rate of 101%. To learn more, see the INET report, p. 27-28.

Figure 28: The residents, good ambassadors for MP2013, European Capital of Culture (source: Occurrence survey for Euréval and MP2013, March 2014)



As a comparison, this is a higher score than seen for Luxembourg 2007, for which 60% of residents recommended a visit to the ECC[99].

[99] Source: Luxembourg and Greater Region, already cited, pg. ??.

The contribution of MP2013 and other factors

The deep involvement of different parts of the community – businesses, institutions, cultural actors, residents - was evident during both the preparation and execution of the European Capital of Culture. But how do we explain this level of involvement?

The contribution of involved parties

Shared goals and ambitions — The economic, cultural, and institutional communities were primarily involved because they shared the same desire to change the status quo: the territory was suffering from a poor image, particularly in the media, and it was important to make it more attractive.

Leaders to unite the movement — As is often the case, the human factor must also be considered. Such a project is carried out by men and women who succeed in creating a new dynamic and encouraging the participation of others. The team that conceived and constructed the ECC project played this role. It was directed by Bernard Latarjet, former cultural advisor to François Mitterrand and former president of the La Villette cultural and economic development programme, and Jacques Pfister, president of the Chamber of Commerce and eventual president of the MP2013 association. This team, propelled by the success of Lille 2004, was able to convince the major figures of the territory that such a project was possible. The mayor of Marseille, Jean-Claude Gaudin, also contributed by choosing to enlarge the territory beyond his city and confiding the presidency of the association to Jacques Pfister, which ensured there would be functioning cultural governance.

The role of the Chamber of Commerce and the local governments — The widespread mobilisation of economic actors owes much to the CCIMP, which both motivated and united the business community. Among the organisations that the CCIMP helped recruit to the ECC were such elite business organisations as the *Union patronale*, the *Club Top 20*, and *Euromed*. One of the main tools it used to motivate businesses was the prospect of the economic benefits that would come to the territory and it cited Lille 2004 as an example. Notably, Mr Pfister relied heavily on the results of the 'Cézanne in Provence' tourism project (6€ of economic returns for every 1€ invested) to show the economic potential in hosting the ECC.

For their part, local governments, such as the department or the city of Vitrolles, were also successful in recruiting businesses based in their jurisdictions.

The contribution of Marseille-Provence 2013

The dynamic of MP2013 and public investments — The ECC clearly played the role of **catalyst and accelerator for culture in the territory**, both in terms of public and private investments. This is particularly true when it came to the construction of new cultural infrastructure or the renovation of existing infrastructure. Some projects were already underway, such as the new performance hall at the Silo or the renovation of the Château de la Buzine, but the ECC sparked an incredible dynamic to create or improve cultural infrastructure, especially in Marseille. Without the ECC, the national government's

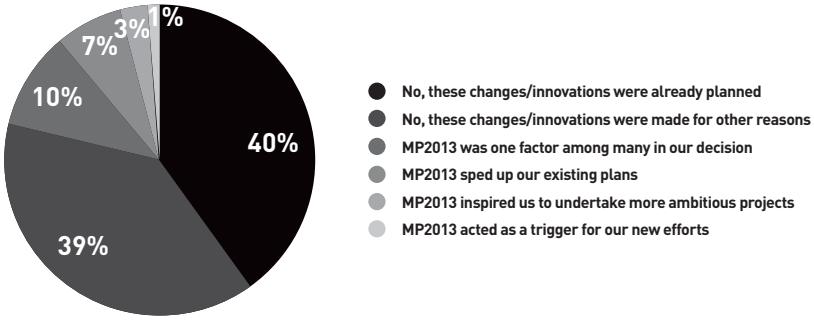
proposal for the MuCEM surely wouldn't have come to fruition. Instead, the museum was built and the national government also decided to finance the renovation of Fort Saint-Jean and to participate in the financing of numerous other cultural sites. In the same vein, perhaps the region wouldn't have agreed to projects such as the Villa Méditerranée or the new headquarters for the FRAC if there wasn't the context of a high profile event like the ECC.

It should also be noted that the city of Marseille decided to restructure its entire museum system. It committed to the renovation of three important museums: the Musée d'Histoire, Château Borély (Musée des Arts décoratifs de la Faïence et de la Mode), and the Musée des Beaux-Arts at Palais Longchamp. Alongside MP2013, the city also launched two endowment funds, one dedicated to patrimony and the other to contemporary art, which featured local businesses as well as major companies such as Suez Environnement, the Fondation Total, and EDF. This fund aims to implement permanent projects for post-2013. In total, almost 600 million euros in investment in culture were put in place in preparation for the year 2013.

This role of catalyst could also be easily observed in the realm of urban renovation, particularly with the redesigned Vieux Port or the improvement of certain municipal services (public transportation, accessibility for disabled people, event management, digitalization of services, cleanliness, and safety).

The dynamic of MP2013 for businesses — The contribution of the ECC to improving the territory's economic landscape is smaller and less direct, but one in four respondents to the small- and medium-sized business survey still confirmed that Marseille Provence-2013 played a role in their efforts to innovate or modernise. (Figure 29). Without being the main trigger, the ECC was nonetheless one factor among others that pushed these businesses to try and improve.

Figure 29: In what ways did Marseille-Provence 2013 influence modernisation or innovation efforts? (small- and medium-sized business survey, March 2014, n=130)?



Those businesses that stated that Marseille Provence-2013 played a role in their decision to innovate cited four principal categories of investment:

→ The development of new services or products (e.g.: 'development of specific products for the event', 'introduction of season-specific sites', 'development of bar or restaurant').

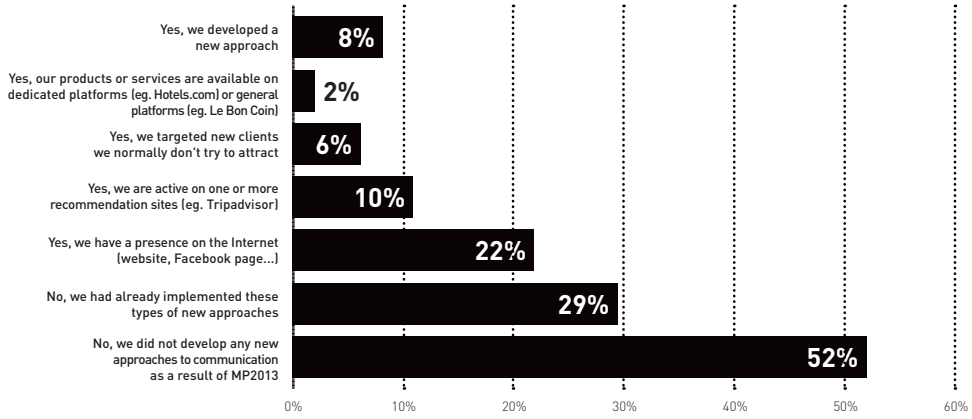
→ The expansion or renovation of their locale (e.g.: 'creating extra space', 'expansion of patio', 'renovation of façade').

→ The development of new communication tools.

→ Diverse expenditures (e.g.: 'decoration, patio, special menus', 'new set or furniture design').

For a certain number of businesses in the tourism sector (hotels, restaurants, services, boutiques) the ECC was also an opportunity to improve their communication, notably via social networks.

Figure 30: Did you develop new communication strategies in connection with Marseille Provence-2013? (small- and medium-sized business survey, March 2014, n=124)



Other factors

The media played an essential part in the mobilisation of groups across the territory, in particular those sectors (businesses, residents, local governments, associations) that hadn't been involved in conceiving the project. The MP2013 association, which invested deeply in media relations, played a vital role in the heavy media coverage that was given to the year, particularly in the local press. The first wave of media coverage just after the candidacy was extremely important and contributed to maintaining the dynamic of the project (see below for the role of the media in changing the image of the territory).

PRINCIPAL OBSERVATIONS ON THE INVOLVEMENT OF DIFFERENT GROUPS

• As with the cultural community (see chapter 1), the economic community was heavily invested in the European Capital of Culture and began their involvement very early in the project. They were crucial to its success, contributing 16% (16.5 million euros) of its budget from 2009-2013, participating in cultural events, and, in some cases (mostly those businesses connected to the tourism economy) adapting their products as a result of the ECC.

• For their part, the local, regional, national, and European institutions invested heavily in not just the operational budget for MP2013 (close to 78 million euros from 2009 to 2013), but also in various other parallel projects that were essential to the ECC's success.

• Residents also embraced the ECC, both by attending various events or exhibitions but also by recommending to their friends and family who lived outside the territory that they come visit during MP2013.

• Finally, the ECC played the true role of catalyst and accelerator for many projects, both in terms of public and private investment. In total, more than 600 million euros in investments were directed toward the cultural and tourism sectors in preparation for MP2013.

DID MORE TOURISTS VISIT THE TERRITORY DURING MP2013?

What happened

The tourist activity in the territory

The ECC territory was already home to a vibrant tourism economy prior to 2013[100] – contrary to Lille 2004 or Liverpool 2008 – and had long-standing infrastructure that encouraged growth (hotel capacity, diverse attractions, etc.). The potential for an increase in tourists was thus more limited than in areas were the tourism sector was less established. Yet there was still a strong increase and numerous tourists came to the territory in 2013, especially starting in the month of May. Proportionally, it was Marseille that saw the greatest growth, partially because the city initially lagged behind the rest of the territory in terms of tourism infrastructure such as hotel capacity. Cities like Aix-en-Provence and Arles also benefited greatly in terms of the increased tourism generated by MP2013, while other areas such as the Camargue, the Côte Bleue or the Alpilles also observed positive increases, albeit to a lesser extent.

According to data from Bouches-du-Rhône Tourisme and the CCIMP, roughly **1.9 million additional visitors** were welcomed to the territory, with 912 000 tourists for MP 2013, 38 000 so-called 'conserved' tourists, and 950 000 excursionists[101].

According to a survey among tourists, there were a huge number of **first-time visitors** in 2013. In fact, the rate of first-time visitors doubled from the previous survey conducted in 2011. The rate of first-time tourists from foreign countries was also very high (70%)[102]. It is very likely that a large proportion of these new visitors took "city trips", that is to say short vacations to an urban centre that generally have a focus on patrimony, cultural, gastronomy, and night life, which is different from the longer summer vacations that people traditionally take in this territory.

This profusion of tourists is confirmed by the statistics from hotels and cruise lines, from the various transportation hubs that serve the territory, and from the data recorded at tourism offices.

Hotel sector

According to information provided by Bouches-du-Rhône Tourisme, which is based on data from INSEE and DGCIS, the hotel and accommodation sector had the following results for 2013:

→ **5.7 million hotel nights**, or an increase of **9%** over 2012 (this should be considered in the context of the rest of PACA which saw a decrease of 3% and a national trend of decreased tourism).

→ **3.2 million arrivals**, or an increase of **11%** over 2012.

→ **3.6 million rooms occupied**, or an increase **5%** over 2012.

Globally, the occupancy rate increased significantly between March and October 2013 compared to the previous year, especially in the upper category representing 3-, 4-, or 5-star accommodations.

[100] The Bouches-du-Rhône welcomes roughly 8 million tourists a year. Source: Bouches-du-Rhône Tourisme.

[101] Conserved tourists are tourists who would have been lost if the region followed national tourism trends. Excursionists are residents of neighbouring regions who don't spend the night in the territory.

[102] But lower than Liverpool (97%), a destination that welcomed few tourists prior to the ECC.

Figure 31: Change in monthly occupancy rate from 2012 to 2013 for chain hotels in Marseille (as a percentage)[103]

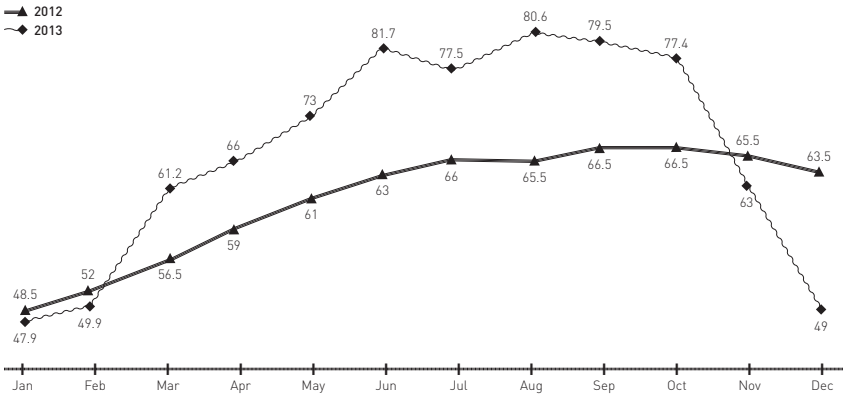
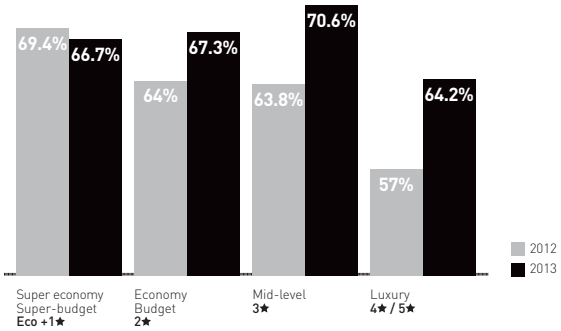


Figure 32: Change in occupancy rate from 2012 and 2013 by category of hotel chain



In terms of the increase in foreign tourists, it is notable that the number of these tourists from outside Europe also rose, although they still represent a tiny proportion of overall tourism figures.

Figure 33: Distribution of tourists by origin (Source: BDR Tourisme, INSEE data)

Geographic origin of overnight stays	In 2013	Change 2013/2012
France	70%	+ 4%
Foreign - Total	30%	+ 23%
Foreign - Europe	22%	+ 18%
Foreign - America	4%	+ 35%
Foreign - Asia	3%	+ 64%

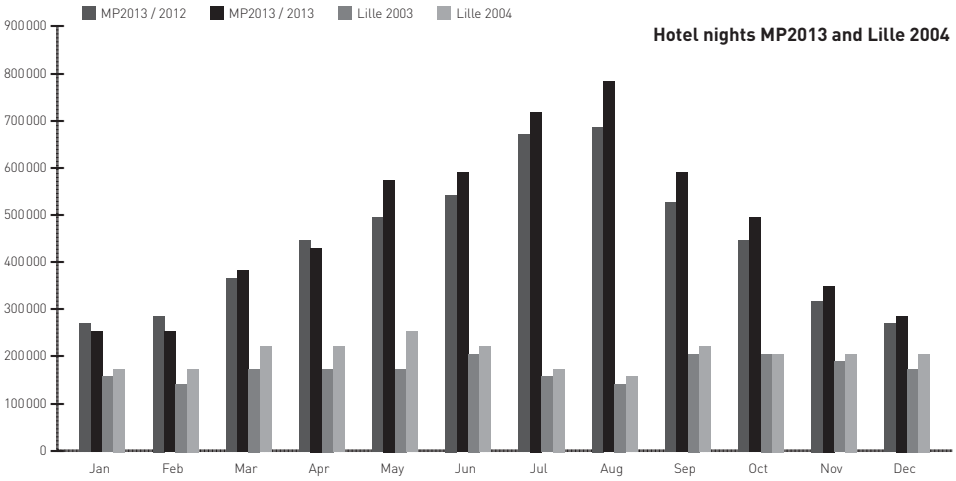
An analysis of the increase in hotel nights in both Marseille 2013 and Lille 2004 allows us to better grasp the phenomenon. Notably, we can see that for Lille 2004 there was an increase in hotel nights every month of the year, while in Marseille-Provence the increase began later and only became truly visible starting the month of May. The numbers are as follows:

→ Marseille Provence: 5.7 million nights, +9%

→ Lille 2004: 2.4 million nights, +13,6%

[103] Source: The French tourism report 'Marseille Observatoire local du tourisme, Chiffres 2013 –Étude In Extenso', Deloitte.

Figure 34: Comparative analysis of the increase in hotel nights for MP2013 and Lille 2004 (Source: INSEE/DIRECCTE/ Bouches-du-Rhône Tourisme)



Of course, this data should be considered in context as the Marseille-Provence territory has twice the population and the reality is that it had a much greater existing tourism sector in 2013 than Lille in 2004 (Figure 35).

Figure 35: Comparison of the territories of Marseille-Provence 2013 and Lille 2004 (source: BDR Tourisme)

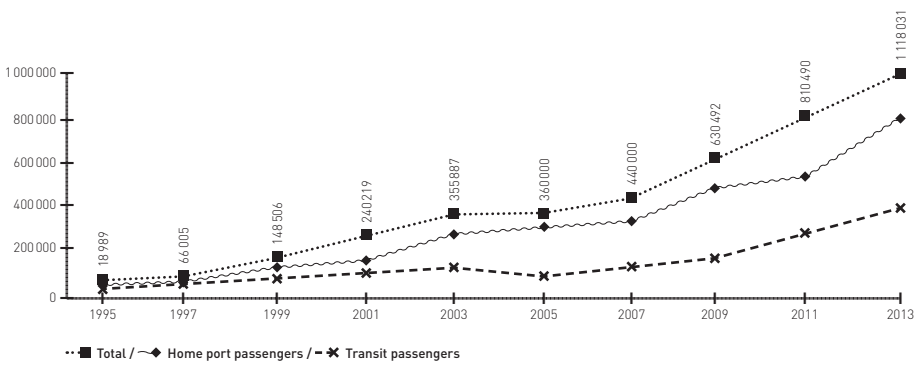
Elements of comparison	MP2013	Lille 2004
Number of residents in the ECC territory	1.9 million	1.1 million
Number of partner communities	119	193
Number of hotels	510	119
Number of beds	37 400	13 400
Number of hotel nights in 2012	5.2 million	2.2 million

Cruise ship tourism

The cruise ship sector also increased in volume. **Cruises that used Marseille as their home port increased by 21.7%** while cruises that **transited in Marseille**, which represent close to 67.9% of passenger volume, increased by **39.8%** over 2012[104]. As a result, Marseille had the best performance of all cruise ports on the Mediterranean and confirmed its spot as the top French cruise port on the Mediterranean. The cruise port benefited from an increase in lines with roughly 311 departures from Marseille, 17 of them newly inaugurated, which shows there is a renewed interest in Marseille as a destination among cruise lines. One reason for this increase in cruise traffic is the reopening of the J4 quay near the heart of downtown, which can welcome boats as long as 200 metres.

[104] Source: French tourism report, 'Marseille Observatoire local du tourisme, Chiffres 2013'.

Figure 36: Increase in the number of cruise ship passengers from 1995 to 2013 (Source: Club de la Croisière Marseille – Provence)



Other indicators of increased tourism in the territory

Guests — Along with tourists who stay in commercial accommodation and those connected with the cruise industry, there are also visitors who are outside of this official network.

According to the survey of tourists carried out in the summer of 2013 by BDR Tourisme and the CCIMP, almost one third were staying in non-commercial accommodation, that is to say the principal residence of their parents or friends, a secondary residence (their own or that of friends or parents), or in some kind of home exchange.

This is confirmed by the survey of 500 residents of the region carried out by Occurrence for Euréval for this report. Among these residents, 40% stated that they had welcomed friends or family into their homes who had come from elsewhere to specifically visit the European Capital of Culture.

Transportation figures — The increase in the number of passengers arriving at the bus and train station, the airport, and seaport are also an indication of the increase in the number of visitors[105]:

→ The Gare Saint-Charles in Marseille, which serves both buses and trains, welcomed 11 518 840 voyagers in 2013 compared to 11 425 015 in 2012, an increase of 0.82%. Since 2008, there is a connection between the train and the airport as a result of the stop 'Vitrolles-Aéroport Marseille Provence'; this accounted for 601 840 voyagers in 2013, or an increase 13.6% over 2012;

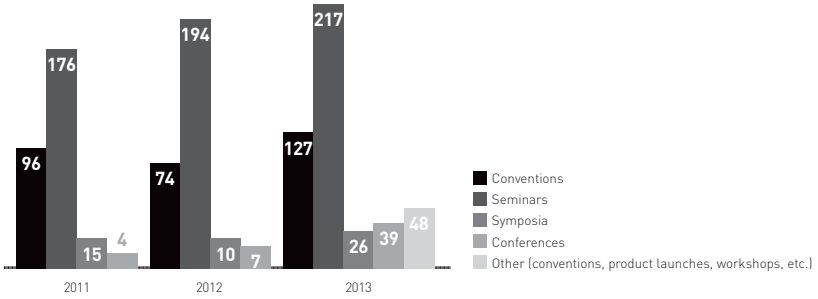
→ After having attracted 1 million new passengers in 2012 (4th highest increase in Europe, according to the rankings of ACI Europe, the trade association for airports), the Marseille Provence airport stabilised its activity in 2013 (–0,4%) with close to 8.3 million passengers. The traffic is distinguished by an increase in international flights, which now represent 56% of total traffic.

→ The port of Marseille welcomed 2.62 million passengers in 2013 compared to 2.44 million in 2012, an increase of 7.4%. It should be noted that the ferry services for Corsica and the category 'Other lines' decreased by 5.2% and 5.9% respectively, while cruise ship traffic increased by 31%.

→ Finally, the use of the public bicycle program 'Le vélo' in Marseille, saw a 30% increase in 2013.

The increase in business travel and convention business — Among the visitors, a certain number came for professional reasons[106]. In fact, the convention business also saw increased activity during the ECC.

Figure 37: Increase in professional meetings by type of activity from 2011 to 2013 (Source: Tourism and Convention — City of Marseille)



As several of the businesses interviewed for this report noted, many companies chose to organize their annual meeting or special events in Marseille or its environs in order to take advantage of the ECC. For certain among them, who have offices throughout France or the world, this represents a new occurrence (previously, companies chose more central locations such as Paris). Feedback from these events was very positive and it is likely that many companies will repeat these experiences.

As a result, in 2013 Marseille was the second leading destination[107] for conventions in France, behind Paris and ahead of Lyon. It also made an enormous leap in the worldwide rankings of the ICCA (International Congress and Convention Association), jumping 68

[105] Source: French tourism report 'Marseille Observatoire local du tourisme'.

[106] In the territory, one tourist in ten is a business traveller.

[107] The new ranking of Marseille is discussed in detail on the city's website (in French)

spots from 142nd place in 2012 to 74th place in 2013. This surge in business is also linked to the number of new facilities to welcome conventions.

This increase in business travel could also be seen other places such as in Arles and Martigues.

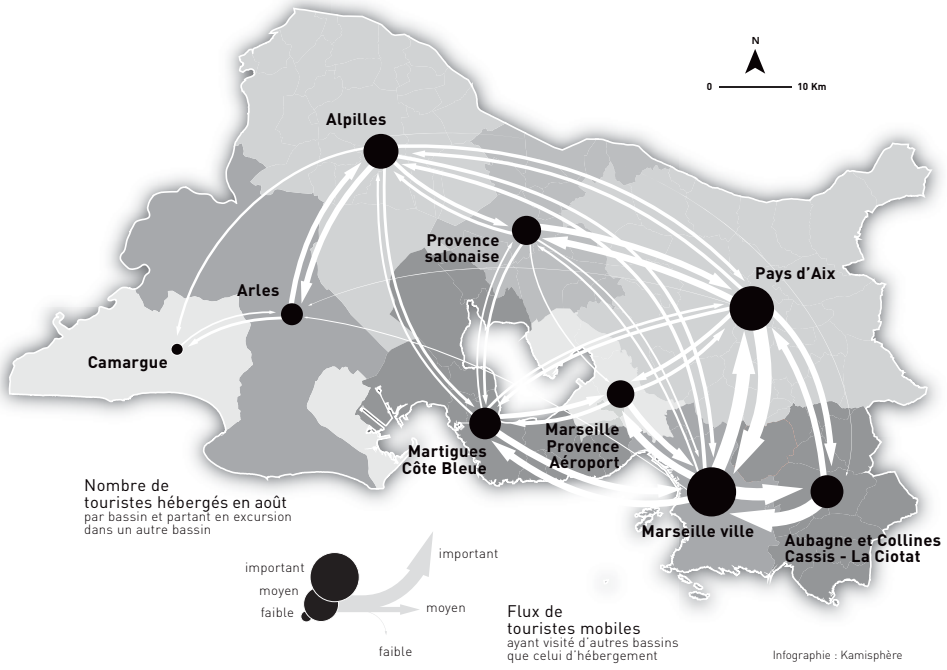
Increased visits to tourism offices — As one example, with 457 645 people served at the counter in 2013, compared to 361 091 in 2012, the *Office de Tourisme et des Congrès* in Marseille recorded a 26.7% increase in clients. For the second straight year, the portion of foreign clients, 54.2% for 2013, was higher than the portion of French clients (45.8%). Foreigners were more numerous than French visitors starting in the month of March and peaking in the month of September. Thus, it seems that Marseille became an increasingly attractive international destination throughout the year.

Greater movement of tourists and residents throughout the territory

Not only did more tourists visit Marseille and Provence, they also travelled more widely throughout the territory. To measure these tourist trips, Bouches-du-Rhône Tourisme used an innovative process called Flux Vision that allowed these movements to be mapped out (Figure 38). Beyond the tourism sector, the survey of residents also showed that locals travelled through the territory more than usual because of the ECC.

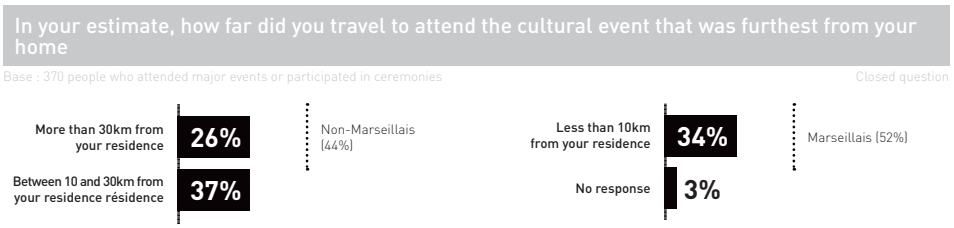
This circulation is an important aspect of the ECC: traditionally, many visitors come to the Bouches-du-Rhône for summer vacations (beaches, countryside) during which time they would nonetheless visit the cities or towns surrounding their vacation residence[108]. Thus, it would be interesting to know if the ECC was able to push this category of tourists to visit places they otherwise wouldn't have. It seems that this was the case, although because this was the first time a Flux Vision study was conducted, more studies in the coming years are necessary to verify this conclusion.
Figure: Tourist movements 2013 (Source: Flux Vision Tourisme — Bouches-du-Rhône Tourisme/Orange)

Figure 38: The movements of residents throughout the territory (Source: Survey of residents, Occurrence for Euréval)



[108] For a description of the make-up of tourists (in French), see the BDR Tourisme, http://www.visitprovence.org/agence_chiffres_cles.asp

Figure 39: The movements of residents throughout the territory (Source: Survey of residents, Occurrence for Euréval)



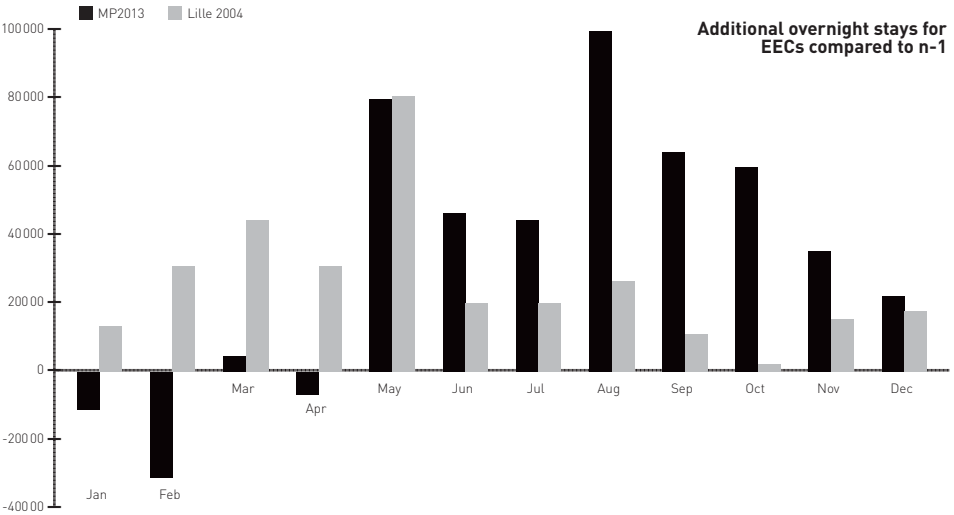
MP2013's contribution and other factors

A large contribution by MP2013 — With a little less than 2 million additional visitors for the year, there was a significant progression in tourism from 2012 to 2013. The contribution of the ECC to this increase was important and involved both the attraction of the general dynamic of the year and the events on the programme. Many visitors came to the territory for a specific cultural event, others came to experience the ECC in general, while others were interested in seeing how Marseille had changed as a result of the ECC.

The tourism study by Agam clearly showed that tourists who came to the territory were aware that it was the European Capital of Culture: between 2009 and 2012, 60% of French tourists considering a visit to the region knew that Marseille was to host the European Capital of Culture and this figure rose to 95% in 2013 itself. As for tourists from abroad, from 2009 to 2012, 40% who were considering a visit to Marseille knew that it was to host the ECC while in 2013 this figure rose to 80%.

At the same time, in Marseille, as was the case for Lille, studies show that the increase in hotel nights (overnight stays) followed the general trend of ECCs, which further clarifies the role that MP2013 played in the increase in tourism (Figure 40).

Figure 40: Increase in hotel nights (Source: INSEE/DIRECCTE /Bouches-du-Rhône Tourisme)



The impact of the MuCEM – It is impossible to separate the effect of the ECC from the effect of the opening of the MuCEM, which received a large amount of media coverage and played a very important role in generating visits from both tourists and residents of the territory (remember that in early 2014, one resident in two had already visited the museum and half of those who hadn't yet visited the museum intended to.)

The role of the media — The media gave broad coverage to the ECC, in particular when the year was launched. This was seen in the foreign media as well (see, for example the article from *The New York Times* that cited Marseille as number two on the places to visit in 2013[109]). It is highly likely that a number of visitors to the region were inspired to come by the media coverage.

[109] The 46 places to go in 2013, New York Times, 11 January 2013.

The media relations efforts made by MP2013 were probably one of the main causes of this wave of positive coverage, as was the new cultural infrastructure in Marseille that led to international recognition (Marseille was named 'European City of the Year 2014' by The Urbanism Academy in London[110], or, in a more anecdotal fashion, the *Wallpaper Design Award for Best City* in 2014), which in turn led to more media interest. The presence of high-profile cultural events (the *Grand Atelier du Midi*, for example) was also interesting for the media and resulted in continued coverage of the ECC throughout the year.

By providing such positive coverage of the ECC from so early on, the local and international media helped generate interest in the region and its cultural offerings among residents and people living abroad. However, this wasn't the case for the national media. The national media organisations, often based in Paris, remained highly critical of Marseille and didn't change their tone until the month of May which saw the event *'Entre flammes et Flots'* and then the opening of the MuCEM, which partly explains the delay in increased tourism (there were also seasonal considerations of course, as the region is less welcoming in winter). It should be noted that this difference in tone between the international press and the national press is a common phenomenon with the EEC: Liverpool in particular went through the same experience.

Direct communication by the ECC about its programme — If the media relations put in place by the association were highly effective and contributed greatly to the coverage, the direct communication regarding the year's programme was much less successful (notably with the Internet site), especially in the first trimester.

Certainly, it wasn't easy to come up with a clear communication strategy for a programme with more than 2 000 events held over 12 months in locations across a broad territory. It is also important to note than in the face of criticism from numerous parties, the association reacted and changed its approach.

This was another difficulty that could be doubtlessly traced back to the very conception of the ECC and the lack of a clear communication strategy or division of responsibilities. Each local government or cultural organisation had their own communication strategy and only shared a common logo. And, everybody expected the association to publicise their events (among businesses, foreign tourists, etc.) but the association didn't have the budget for extensive promotional campaigns for everything.

Ultimately, direct communication only partially contributed to the visibility of the ECC and the attraction of tourists, but as noted earlier, these difficulties were largely offset by the success of the Pavillon M and involvement of the local media (see material starting on pg. 420 and later sections).

Coordination of tourism campaigns — The increase in tourism didn't really begin until May, which can be explained by several factors, in particular the season (the start of the year is traditionally very calm for tourism as the territory is a summer destination).

Nonetheless, there was also a lack of conviction among tourism professionals early in the year, illustrated by the slow mobilisation of related business (see above), which played a role in the late start to the increased tourism. There was also an early problem with both a lack of general information and specific ticketing services for people who may have wanted to travel to the territory. The tourism industry had done some work to prepare for the ECC, but there was likely a lack of collective planning toward the end of 2012. According to those involved in the project, if the "tourism packs" for visitors had been put in place earlier, there likely would have been an increase in tourism from the very start of the year.

Information, orientation — The opening of the Pavillon M, the involvement of the tourism offices, and the creation of the transport pass did help make life easier for tourists. The Pavillon M, a temporary structure constructed by the city of Marseille at the start of the ECC, was one of the main gateways (if not the only one) to the European Capital of Culture. The Pavillon M introduced visitors to the year and the 2 000 possible events they could attend. The City Pass card (which combined access to access to public transportation, a tourist train, and various museums together) sold 16 438 copies in 2013 compared to 6 908 in 2012, or an increase of 138%.

Finally, it should also be noted that the residents of the territory also played their part (see the preceding section) by acting as ambassadors for the year and welcoming their friends and family to the territory to discover the ECC.

PRINCIPAL OBSERVATIONS REGARDING TOURISM TO THE TERRITORY

• The ECC territory, which already had a very strong tourism industry, welcomed 1.9 million additional visitors (50% tourists and 50% excursionists) in 2013, and registered an increase in foreign visitors and first-time visitors.

• This increase is confirmed by statistics from both the hotel sector (a 9% increase in hotel nights in 2013) and the cruise ship sector (a 31% increase in passenger volume) as well as by indicators relating to business travel and conferences (in 2013, Marseille climbed to 2nd place among French cities in terms of hosting conferences and it also made a leap in international conference rankings).

• The cultural programme and the overall dynamic generated by the ECC, the opening of the MuCEM, and the coverage from local, national, and international media clearly contributed to the rise in tourism. This success was achieved despite obvious difficulties with coordination and direct communication encountered at the beginning of the year.

• The programme also resulted in more travel within the territory by both visitors and residents of the territory.

[110] This association of 500 urban design professional in Britain rewards the most impressive urban renewal of the year.

DID LOCAL RESIDENTS AND BUSINESSES BENEFIT FROM A BETTER LIVING AND WORKING ENVIRONMENT THANKS TO MP2013?

What happened

In recent years, and in particular in 2013, Marseille and several other cities in the MP2013 territory saw their public spaces undergo a transformation. New cultural structures emerged and new urban landscapes were created. Contemporary architects, both regional and international, built new creative spaces in Marseille, Arles, Aix-en-Provence, and Aubagne. In Marseille, residents were suddenly able to access a broad new swathe of waterfront.

This sort of urban transformation is relatively common in cities that host the European Capital of Culture. In effect, according to the Palmer Report (2004), almost half of the cities that were given this label chose to renovate parts of their urban core for the occasion. This was the case in Genoa, Brussels, and Porto, which all refurbished their historic neighbourhoods and cultural centres, in Salamanca and Graz which attempted to create new cultural installations, in Copenhagen which renovated its arsenals in such a way that they could later become schools, and, most recently, in Liverpool which succeeded in overhauling a part of its waterfront.

Urban renewal

New or renovated cultural infrastructure — The principal cities of the territory improved their museums, or in the case of Marseille, entirely re-organised their museum system. Along with the new and re-opened structures introduced for the year (see pg. 22), there were also cultural organisations that changed locales and the renovation or extension of existing structures, including:

→ The extension of the *Musée départemental Arles Antique* (Arles Museum of Antiquity). The construction permit for the planned *Parc des ateliers* by Fondation Luma was also signed in 2013.

→ The extension of the *Conservatoire de Musique et de Danse Darius Milhaud* (Darius Milhaud Conservatory) at the Musée Granet[111] in Aix-en-Provence. Also near Aix, the Camp des Milles, the only World War II internment and deportation centre still intact, was opened to the public at the end of 2012 and is today home to an important history museum specialised in historical education and culture.

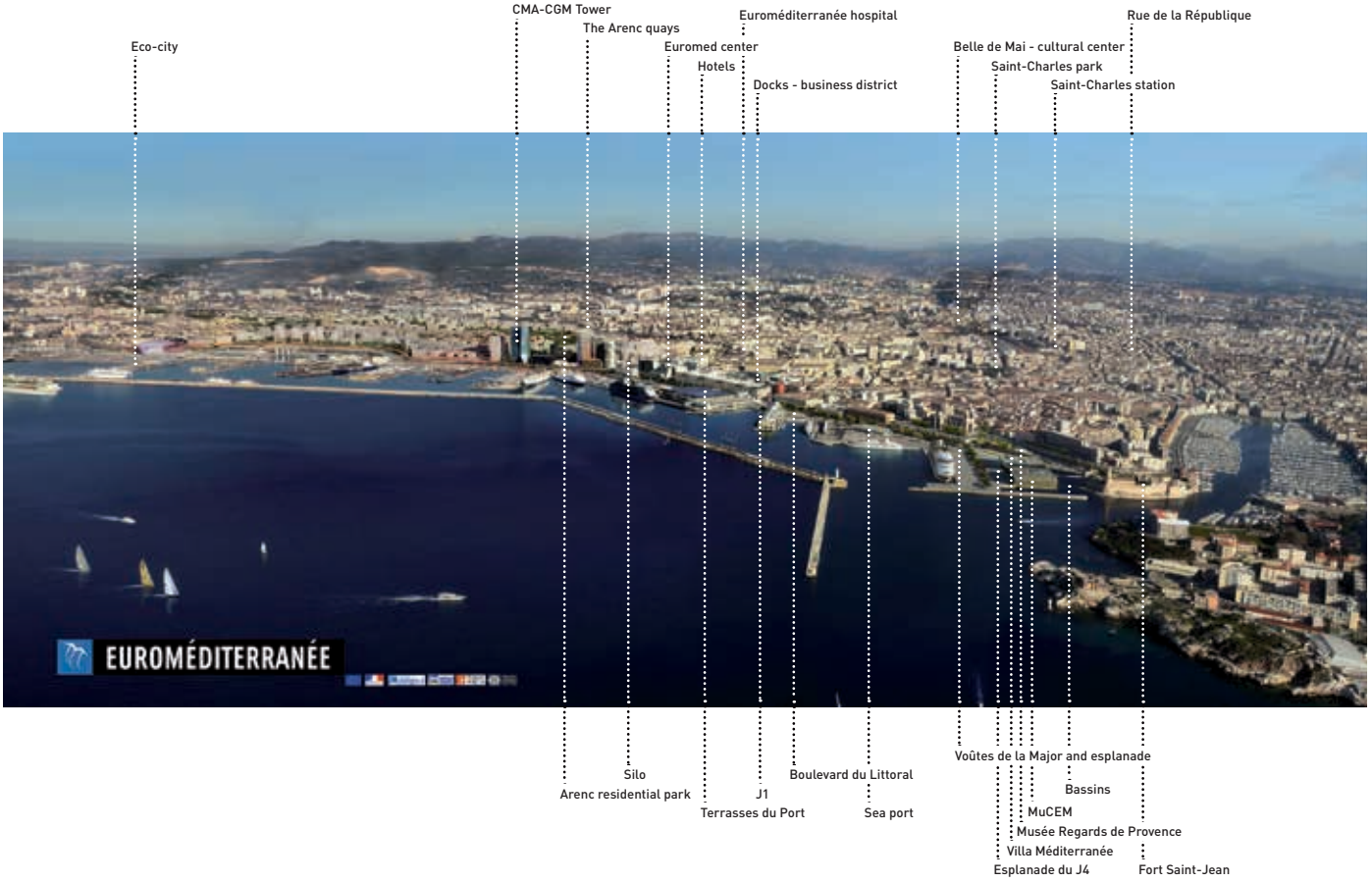
→ The *Théâtre Joliette-Minoterie*, the *musée d'Histoire*, the *musée des Beaux-Arts au Palais Longchamp*, the *Cité des arts de la Rue* (in the Aygalades) in Marseille. The *Friche La Belle de Mai* also continued its gradual opening of new exhibition spaces: the *Tour-Panorama* with five floors of exhibition space and a roof top terrace, the games area and community vegetable garden open to residents of the neighbourhood, and the *Plateaux*, two new spaces for performance arts.

Major urban renewal — The urban renewal didn't just concern cultural structures, it also affected the very urban fabric of the cities. Every community followed their own plan for the renovation of their urban areas. The changes were most obvious in Marseille. The city, the agglomeration, and the national government continued with their existing development plans, notably with the extension of the *Euroméditerranée* project, with the construction of the accompanying housing and office spaces and a new tram line (T3) that is planned to open in 2014 and will complete the link between the downtown core and *Euroméditerrannée*.

These projects all concerned the historic and tourist centre of the city, although urban renewal projects continue in other urban spaces as a function of city policies.

[111] The Chapelle des Pénitents Blancs also offered more than 700 m² of supplemental exhibition space to the museum.

Figure 41: Marseille waterfront (Source: Euroméditerranée work groups, preliminary study, 2003 / Photo : Nicolas Salmeron – Golem) Images



The period from 2012 to 2013 also featured the **profound restructuring of the waterfront in Marseille**:

→ The Vieux Port was entirely transformed to become one of the largest public spaces in Europe with a complete reorganisation of the automobile traffic along its perimeter and the removal of barriers that impeded direct access to the sea. Public transportation now has dedicated lanes and pedestrian space was widened. The new quays can now host events and performances. The easing of the traffic and the resulting tranquillity benefit local bars, restaurants, patios, and other businesses near the port.

→ The restoration and improvement of the Fort St Jean, now linked to the new J4 and the forecourt of the Saint Laurent church in the Panier neighbourhood with overhead walkways, ensures that the entire downtown is walkable and connects the oldest neighbourhood in the city with the new cultural structures along the waterfront.

→ The neighbourhood around the J4, which is already home to the MuCEM, was profoundly transformed with the renewal of the boulevard du Littoral, the construction of Musée Regards de Provence, the construction of the Villa Méditerranée, and the creation of a new forecourt around La Major cathedral. A little farther along this new boulevard, the J1 hangar was renovated by the *Grand Port maritime* for the 2013 and was exceptionally made open to the public for a year as an exhibition space and centre for participative cultural activities. Just beside the port, in front of Place de la Joliette, the immense shopping 'Terrasses du Port' is scheduled to open in 2014, as is the 'Voûtes de la Major' commercial space.[112]

It was this level of turban renewal that permitted the city to received the previously cited prize for the European City of the Year 2014.

As for the city of Aix, it had already introduced several projects such as the Pavillon Noir (designed by Rudy Ricciotti, just like the MuCEM) and the Grand Théâtre de Provence, and for the third new piece in its cultural oeuvre it added the Darius Milhaud Conservatory (designed by the Japanese architect Kengo Kuma who also designed the new Frac headquarters in Marseille). Finally, the city of Arles invested in its historical legacy and continued its commitment to the art of photography.

An improved range of accommodation — As previously mentioned, the range of accommodation evolved during this period, with several hundred new rooms being put on the market and a specific concentration on high-end or luxury rooms (with key projects such as the Intercontinental Hôtel-Dieu, a new 5-star hotel with 194 rooms and suites a stone's throw from city hall). These new options for accommodation don't really affect the residents of the region, but this is an important development for the business community, especially those with activities in the urban centre of Marseille.

The improvement in transportation options

In the realm of transportation, things also changed in terms of the range of options:

→ In Marseille, the opening hours of the metro were extended until one o'clock in the morning, seven days a week, starting in April 2013, and night bus services were expanded, an effort that included both a new line and adaptations to existing lines.

→ Three new traditional bus lines were created: an electric shuttle that serviced the Vieux Port (this shuttle stopped operating 31 December 2013) and the lines 82/82S that serviced the waterfront. Service was also expanded on certain pre-existing lines[113].

→ Roughly forty public transportation stops were renovated by MPM or Euroméditerranée in order to make them accessible to people of reduced mobility[114].

→ The city's water shuttle service was improved. In March 2013, a water shuttle between the Vieux Port and Pointe Rouge began running at 07h00. In April, a new water shuttle between the Vieux-Port and L'Estaque began daily operation starting at 07h30. It appears their future is uncertain.

It should be noted that, with the exception of the Vieux-Port – L'Estaque water shuttle, this new range of public transportation almost exclusively services the tourist centres in the downtown core. Even such emblematic sites such as the Friche La Belle de Mai, which is extremely difficult to access using public transportation, didn't benefit from any improvement in service.

The public transportation ticketing services also evolved during this time:

→ The Pass Transport MP2013 was specifically created by the urban agglomeration MPM and the AOT (authorities organising transportation in the Bouches-du-Rhône) as part of MP2013. This Pass Transport allowed travellers unlimited access to city and inter-city transport for three different time periods (24 hours, 48 hours and 72 hours) and for different profiles of users (general public, youth, families). Another version of the program provided access to local trains.

→ A City Pass was offered for 22€ (24 h) or 29€ (48 h) that allowed free access to all museums, access to the Château d'If by boat (transportation + entrance), a guided visit of Marseille by tourist train, unlimited use of public transportation, and discounts at more than 20 participating stores.

It should be noted that the first offer, the Pass Transport MP2013, which would have been extremely useful for residents of the territory, wasn't continued in 2014. However, the City Pass for tourists was continued.

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[112] In the near future, the space at the base of the cathedral will be home to more than 5 000 m² of boutiques and restaurants.

[113] "Eugène Caselli announces an innovative new transportation plan for Marseille Provence Métropole for MP2013", seen on the MPM site: http://www.marseille-provence.com/actualites/transports/plan-transport-mp-2013.html

[114] This is part of an accessibility programme that was made obligatory by the 2005 law, the 'loi Handicap', and it must be completed in 2015.

Emphasis on the region's natural attractions

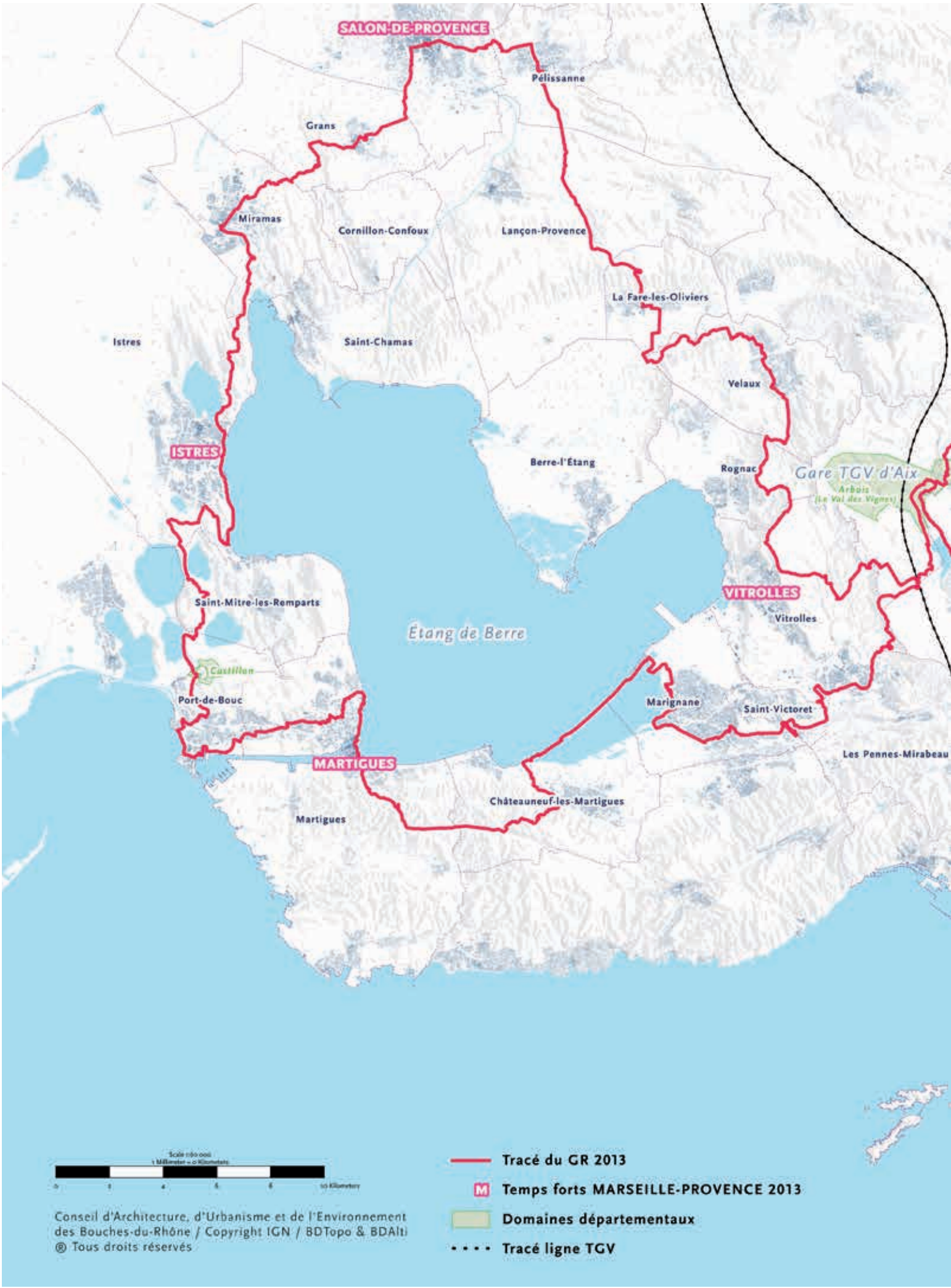
The national park **Parc national des Calanques** was created in April 2012 and it is unique in the sense it embraces both the land and the sea in a semi-urban setting. It welcomes more than 2 million visitors per year from both sea and land, with access from neighbouring Marseille, Cassis, La Ciotat, or the Penne-sur-Huveaune. During the summer of 2013, programmes put in place by the national park service allowed more than 80 000 people to learn about the marine and terrestrial environment.

There was also a new hiking trail that was opened in 2013: the **GR® 2013**[115]. This is a 365 km trail along the edges of the metropolis that provides a new perspective on Marseille and Provence. This cultural, artistic, and touristic project was the result of the collaboration between the 38 jurisdictions that the GR passes through, the departmental government, the French national hiking association *Fédération française de Randonnée pédestre*, the regional hiking associations, and Bouches-du-Rhône Tourisme. Located in the outskirts of the urban areas, it allows hikers to discover this unique territory that unites countryside and cities, natural green spaces and industrial sites, a metropolis and the seaside cliffs.

These are both long-term developments and are likely to benefit both visitors and residents of the territory.

[115] The first national hiking path that cuts through a city, the GR®2013 is an artistic project conceived by Baptiste Lanaspeze with a collective of artist-hikers.

Figure 42: The GR® 2013



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Cadolive
Peypin
La Destrousse
Septèmes-les-Vallons
Pichauris
Auriol
Plan-de-Cuques
Allauch
Roquevaire
Plan-d'Aups-Sainte-Baume
Aubagne
Gémenos
Saint-Pons
Marseille
AUBAGNE
MARSEILLE
La Penne-sur-Huveaune
La Barasse

Involvement of the public

The people of Marseille seem to have appreciated this transformation and frequented the new structures downtown (Vieux-Port, the renewed waterfront) in large numbers during the major outdoor events such as the opening ceremony. According to organisers of these events, there was an overall appreciation of being able to gather in these spaces for festivities without any civil unrest. Indeed, this was surely one of the major developments of 2013: residents were able to celebrate the major events together in public spaces without any tensions or troubles, a new experience of living together.

The residents, just like the tourists, also made use of the temporary structures such as Pavillon M. The museums which reopened after renovation also saw an increase in the number of visitors compared to before their closing.

In a more general manner, during the year residents also visited neighbourhoods or areas in the territory that they normally didn't frequent.

These transformations also generated a certain amount of criticism. Detractors worried that they would lead to the gentrification of Marseille[116] or create a new urban core that would overshadow the historic centre. Although this isn't the forum to address such a complex phenomenon, it is interesting to note that even though the downtown core of Marseille is becoming more 'bourgeois' as a result of the urban renewal policies put in place since the year 2000, this process didn't appear to accelerate in 2013. For example, there was no increase in rents that year in Marseille, unlike the rest of the country.

For this question, as with the issue of the commercial development of the waterfront, it is likely the result of a combination of urban renewal policies. MP2013 played a role in this, but no true conclusions will be able to be reached in the short term.

[116] This criticism has been repeatedly directed at the Euroméditerranée project over the last several years.

The contribution of MP2013 and other factors

The contribution of MP2013

Improvement of the urban space — The MP2013 association neither financed nor managed the investments discussed above. The principal financial operators were the French state, Euroméditerranée, and local governments (see below).

Nonetheless, the European Capital of Culture clearly contributed to the evolution in urban infrastructure in two manners:

→ As a **catalyst** for investment.

→ By setting a **common target date**.

By giving a diverse group of organisations and institutions a common goal and a clear deadline of January 1, 2013, MP2013 acted as a **powerful accelerator** for a series of projects, some of which were in the process of being abandoned for either a lack of means or a lack of political will. It isn't certain that without the European Capital of Culture there would be a MuCEM in Marseille, that the Villa Méditerranée would exist, that the Longchamp and Borély museums would have been renovated for 2013, or that the Hôtel-Dieu would be a leading luxury hotel, to cite but a few examples.

The designation as ECC acted as powerful leverage that allowed a great deal of financing to be released for numerous work sites that were on standby and it also provided the city with motivation to try and improve its out-dated cultural and touristic infrastructure.

The ECC allowed energies to be channelled, investments to be justified, and collaborations to be strengthened, to the point where 650 million euros were directed toward diverse infrastructure projects.

MP2013 also provided a real deadline for all the investors: everything had to be ready for 2013. To facilitate this deadline, the MP2013 association provided several key systems of support: the Administrative Council met regularly with major financers, while the coordination committee and a work site coordinator worked with the prefecture of the Bouches-du-Rhône in order to make sure **the process was streamlined**.

On the other hand, these new structures almost exclusively were in the tourism realm, which affected residents in the sense that they could visit the tourist centres of the city but didn't have a true impact on their daily lives. In this sense, improvements such as the extended metro hours, which are now on par with other European cities, may have had the most impact on residents.

The use of public space — In terms of encouraging more civil public gatherings, Marseille-Provence 2013 clearly played a role with the major events it produced or co-produced in public space, such as the opening ceremony (12 January), *'Le Vieux-Port, entre Flammes et Flots'* (3 and 4 May), the *Fête de la Musique* (21 June), *TransHumance* (7 – 9 June in Marseille), *Révélations 8* (31 December), which allowed visitors and residents to share festive, communal moments. This was true in Marseille and in other cities across the territory where events were also the occasion for public gatherings.

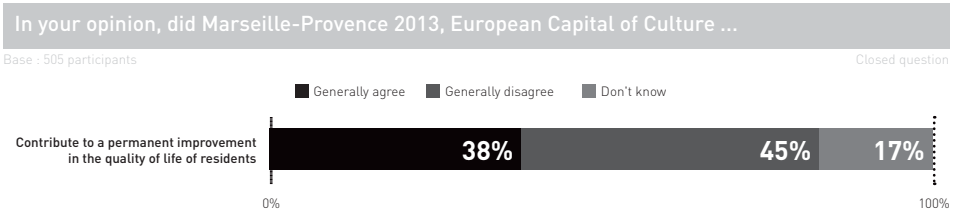
The second contribution was the organisation of projects throughout the territory, which inspired residents to travel beyond their habitual areas. Among the notable projects in this domain were the *Champs Harmoniques* near the village of Goudes, *Nuits industrielles* in Martigues or Port-de-Bouc, and the Hôtel du Nord projects in the northern neighbourhoods of Marseille.

Finally, the contribution of projects with a community dimension, while quantitatively smaller, was also profound because it was always accompanied by a series of consultations and collaborations with residents. This aspect was discussed in more detail in Question 1 (pg. 37).

Perception of the benefits of the ECC — It is interesting to look at the perceptions of different parts of the community concerning the contributions of the ECC to improving the quality of life for residents.

This question was asked during three surveys conducted for this report: the survey of residents, the survey of small- and medium-sized businesses, and the survey of cultural actors. In the end, 38% of residents, 42% of businesses, and 55% of cultural actors that received financing considered that European Capital of Culture improved the quality of life for local residents. It is likely that perspectives vary depending on a person's location in the territory, but the percentage still remains relatively high.

Figure 43: The impact of the ECC on quality of life according to residents (source: Occurrence survey for Euréval)



Other factors

The major changes that might have affected the living and working environment for residents and businesses in the territory were principally connected to policies put in place by the local governments or the French national government. Beyond Marseille and, to a lesser extent, Aix-en-Provence, the ECC didn't have any noticeable effect on the quality of life beyond the new cultural infrastructure that was aimed at tourists just as much as local residents.

In Marseille, it was clearly *Euroméditerranée* and its associated projects that changed the face of the city, regardless of whether these changes were seen in a positive or negative light. It is also what explains the concentration of investment in such a small section of the city: it was *Euroméditerranée* that made them possible, either in terms of existing urban renewal projects, available property space, engineering, or management.

According to certain parties, Marseille-Provence 2013 helped propel the long-term project that had been discreetly underway for the last 20 years and perhaps pushed the renewal ushered in by Euroméditerranée a few years ahead of schedule.

PRINCIPAL OBSERVATIONS REGARDING CHANGES TO QUALITY OF LIFE

• In recent years, and in particular in 2013, Marseille and a certain number of other cities in the territory saw their public spaces transformed.

• The principal cities improved or, in the case of Marseille, entirely restructured their museum systems. New cultural infrastructure appeared and many existing sites were renovated. The territory's natural resources were also put in the spotlight thanks to projects such as the creation of the Parc national des Calanques and the GR® 2013 hiking trail.

• The improvements went beyond cultural spaces and had an impact on the entire urban fabric. Every community invested in urban renewal but it was in Marseille that this could be most clearly observed, with changes to the waterfront especially visible.

• There was an increased level of transportation options: extended metro hours, new bus lines, extra water shuttles. Special transport passes were also created to make it easier to travel throughout the area (city and inter-city).

• Residents were also part of this change by participating in vibrant public events without any unrest or conflicts, marking a new era of civil public festivities.

• MP2013 neither financed nor managed the investments presented in this section. But the European Capital of Culture clearly contributed to the transformation of the urban landscape by playing the role of catalyst for certain investments and accelerator for others by imposing the 2013 deadline. The association also helped streamline the process by coordinating the efforts of different parties.

• On the other hand, the urban renewal almost exclusively concerned infrastructure aimed at tourists, which affected residents in terms of new cultural options but didn't really impact their quality of life.

DID THE TERRITORY ENJOY ECONOMIC BENEFITS AS A RESULT OF INCREASED TOURISM AND BUSINESS ACTIVITY?

What happened?

The European Capital of Culture had several goals: improve the international reputation of the territory, attract new tourism, and enable cultural development (this involved a subset of goals such as the creation and diffusion of ambitious new work, the promotion of the territory's creative potential, the integration of culture into public space in innovative ways, and the involvement of residents through a participatory approach). Yet many of those involved in the project also expected the ECC to result in economic benefits for the territory.

There could be several sorts of economic benefits:

→ The benefits could be *directly linked to ECC projects* (the financing of cultural events and the accompanying economic activity) or *indirectly linked to the ECC projects* (the infrastructure and urban renewal that were accelerated for the year, see previous chapter).

→ The benefits could be *linked to the results and impacts of the ECC* (economic benefits from increased tourism and the spending by new visitors to the territory).

This section relies heavily on the economic assessment study "*Impact économique Marseille-Provence 2013 Capitale Européennes de la Culture*" conducted by the CCIMP in partnership with BDR Tourisme and the MP 2013 association. It notably makes use of a vast survey of tourists that was carried out in 2013. This survey added to the regular assessments of tourists carried out by BDR Tourisme and studies of investments in tourism by CCIMP.

This study determined that the **total economic impact of Marseille-Provence 2013, European Capital of Culture was close to 500 M€**. This considers all economic benefits that the region would not have enjoyed if the ECC had not taken place in 2013. The same study estimated **that close to 2 800 jobs were created or conserved** in 2013.

The investments themselves do not constitute a direct economic impact of the ECC, but they nonetheless can be considered part of the '2013 effect', especially in the long term. Among these investments, **665 M€ was invested in more than 60 construction projects that were emblematic of MP2013**, to which can be added the **130 M€ invested in improvement projects with a significant tourism factor and the 270 M€ invested by the hotel industry**.

It is very difficult to know exactly what part of these expenditures directly profited businesses in the region. This was never part of the accounting when estimating the economic benefits presented here. Nonetheless, it seems that a a significant part of this sum did go to local businesses. In just one example, even if the construction sites were generally managed by major European groups such as Vinci or Eiffage, these companies did employ numerous local sub-contractors.

Direct impact of events

The 'direct impact' figure is the result of first analysing the expenditures of the MP2013 association and its principal co-producers for cultural events (salaries, purchases, etc.) and then determining what percentage was spent within the geographic limits of the territory of Marseille-Provence 2013.

This calculation was made by the CCIMP and MP2013 using an analysis of the expenditures by the association and the location of suppliers, and by identifying the major co-producers whose expenditures were then audited. These results were put together in the first semester of 2014 after all the accounts for 2013 had been closed.

This analysis concluded that **62 M€ was spent in the territory[117] for the production of events branded MP2013**, which represents 68% of the expenditures by the MP2013 association:

→ Excluding salaries, 45 M€ was spent by the MP2013 association.

→ 7.5 M€ in exceptional expenditures by MP2013's co-producers for the principal branded events. To widen the net and capture the fuller impact of MP2013, exceptional expenditures by cultural organisations and private establishments were taken into account. The analysis looks at the 25 largest organisations (in terms of MP2013-related expenditures). This group of 25 generated more than 11 M€ in expenditures that didn't appear in the association's budget. The previous rate of 68% local expenditures was then applied to the exceptional expenditures of co-producers.

→ 9.3 M€ in net salaries across the MP2013 territory.

[117] This calculation was made using the location of the businesses headquarters. Thus, the economic benefits may have been under-estimated if there were cases of orders going to a company with international headquarters but local offices.

Figure 44: Analysis of the association's expenditures (source: MP2013)

	Departement	Total	Part
Total 2010 / 2014	**44 721 122 €**	**66 004 645 €**	**68%**
2010	33 733 €	58 748 €	57%
2011	3 431 405 €	4 880 301 €	70%
2012	13 223 980 €	19 384 631 €	68%
2013	26 943 084 €	40 095 744 €	67%
2014	1 085 320€	1 585 221 €	68%

Indirect impact of increased tourism revenues

A tourist is defined as any person who spent at least one night in the defined territory and whose main residence is outside this defined territory.

It is first necessary to determine the number of tourists in 2013 and calculate the number of additional visitors compared to a 'normal' year.

The increase in receipts from the hotel tax is one indicator of the increase in tourism: 2 612 501€ were collected in 2013, a 25.2% increase over 2012.

Beyond this, there are several ways to quantify the increase in tourism:

→ **The increase in number of overnight stays and thus visits in 2013 compared to 2012**
The number of tourists is calculated in terms of overnight stays and average length of stay. The initial observation: the number of overnight stays increased by 3.4% between 2012 and 2013.

Figure 45: Increase in number of commercial and non-commercial overnight stays (source: B.E.T François Marchand for CRT PACA 2010-2011, Bouches-du-Rhône Tourisme, CCIMP)

Year	Overnight Stays
2012	41 344 344
2013	42 757 146
Increase	**1 412 802**

→ **The decrease in the average stay for tourists in 2013 as opposed to 2012**
The average stay is estimated using information from the regional tourism organisation, the *Comité régional du Tourisme PACA*. A similar study was made by CCIMP in 2013. This shows us that there was drop in the average stay of .6 days from May to October and a drop of .3 days for the rest of the year.

Figure 46: Decrease in length of average stay (Source: B.E.T François Marchand for CRT PACA 2010-2011, BDR Tourisme, CCIMP)

Periods	Overnight stays	Average length of stay	Difference in stay
May to October 2012	30 657 355	6.2	-0.6
May to October 2013	32 383 934	5.6	
Rest of 2012	**10 686 988**	**4.9**	**-0.3**
Rest of 2013	**10 373 212**	**4.6**	

This decrease in the length of stay (likely due in part to the rise in 'city trip' tourism) shows that there were actually more new tourists than a simple tally of the increased hotel nights suggests. At the same time, this shows that even if there was a decrease in the number of overnight stays during the off-season, there was actually a slight increase in the number of tourists.

Figure 47: Estimate of additional tourists in 2013 (source: BDR Tourisme, CCIMP)

Periods	Overnight stays	Average length of stay	Number of tourists
Change: May-October	1 726 579.65	-0.60	838 111
Change: Rest of year	-313 776.23	-0.30	74 028
Change: 2012/2013	1 412 803.41		912 139

By this measure, the region attracted more than 910 000 additional tourists in 2013.

→ **A stable level of tourism in the department**. Baseline tourism levels remained stable in the territory while the economic crisis led to a decrease in tourism in the rest of the PACA region and across France. Normally, tourism in the Bouches-du-Rhône would have followed the national trend in 2013 if it hadn't been for the impact of MP2013.

Figure 48: Estimate of conserved tourists during a general tourism crisis (source: B.E.T François Marchand for CRT PACA 2010-2011, Bouches-du-Rhône Tourisme, CCIMP)

	BdR, Var, Vaucluse, Alpes-Maritimes	Var, Vaucluse, Alpes-Maritimes	BdR actual	BdR if followed department trend
Year	Overnight stays	Overnight stays	Overnight stays	Overnight stays
2012	183 291 947	141 947 604	41 344 343	
2013	184 002 000	141 245 000	42 757 000	41 139 699
Change 2012/2013	710 053	-702 604	1 412 657	-204 644
%Change 2012/2013	0.39%	-0.49%	3.42%	-0.49%

If the Bouches-du-Rhône had followed the same trend observed in the neighbouring tourist regions of PACA between 2012 and 2013 (Var, Vaucluse, Alpes-Maritimes), the department would have lost more than 210 000 overnight stays (-0.5%). This is the equivalent to the loss of 38 000 tourists.
Thus, the territory conserved 38 000 tourists.

→ **The accounting of excursionists along with tourists**. Thanks to the innovative new measurement "Flux Vision pour le Tourisme" (Bouches-du-Rhône Tourisme and Orange TM), people taking day-trips to the territory could also be measured.
For the first time, Flux Vision allowed the touristic activity of all people to be measured, whether they be residents, tourists, excursionists, or merely in transit. According to Flux Vision, there was a ratio of 1.5 excursionists for every 1 tourist. Yet excursionists are permanent residents of a neighbouring territories who may be counted when they travel for leisure, to do shopping, or on their daily work commute, events that clearly shouldn't be used in the calculation of tourism statistics. Thus, the ration of 1 tourist for every 1 excursionist was used. According to this estimate, the territory also welcomed 950 000 excursionists in 2013 (Source: OrangeTM — Flux Vision for Tourisme/BDR Tourisme).
Thus, the Bouches-du-Rhône department welcomed close to 2 million additional tourists and excursionists as a result of MP2013.

Once the number of additional tourists and excursionists is known, it is then necessary to estimate their average spending in the territory during their stay. To do this, a study of 2 393 tourists to the Bouches-du-Rhône department was conducted between 25 July and 8 November 2013[118].

For comparison, the estimate of the indirect economic impact relies on the data harvested from another study of tourists conducted by CRT PACA/Bouches-du-Rhône Tourisme in 2011. Notably, this tells us the average length of stay and the average amount spent by tourists between May and October of 2011: 6.2 days and 58€. In 2013, **the average amount spent was 65.40€** (or between 7€ and 8€ more per day) and **the average length of stay was 5.6 days** (or 0.6 days less). Thus, the total amount spent per stay (65.40€*5.6=366€) is roughly 7€ higher per tourist according this calculation (366€ compared to 359€).

The average amount spent per day by tourists is 66€ while the average amount spent per day by excursionists is 26€.

The estimate of economic benefits linked to the additional tourists and excursionists is thus **roughly 428 million euros**.

Figure 49: Calculation of extra spending per tourist (note: 100% of additional tourists are counted as part of the indirect impact, Source: Bouches-du-Rhône Tourisme; CCIMP)

Type of tourist	Additional spending
Regular tourists	**7€ more per day**
Extra tourists: May to October	66€ x 5.6 jours = 397€
Extra tourists: rest of year	66€ x 5.3 jours = 350€
Additional tourists	
Conserved tourists	66€ x 5.6 jours = 397€
Excursionists	26€ x 1 jour = 26€

Figure 50: Calculation of indirect economic impact (Source: Bouches-du-Rhône Tourisme; CCIMP)

Type of tourist	Number	Additional spending in €	Indirect economic impact in €
Regular tourists	**7 800 820**	**7**	**54 605 737**
Additional tourists	**912 139**	**367**	**334 462 890**
from May to October	838 111	368	308 660 280
rest of the year	74 028	349	25 802 610
Conserved tourists	**38 612**	**368**	**14 220 171**
Excursionists	**950 751**	**26**	**25 076 813**
Total	**1 901 502**		**428 365 611**

The ECC also led to certain public costs that must be considered when discussing the economic benefits:

→ Displacement costs, that is to say the possible loss of certain non-local visitors or the substitution of non-local visitors with local visitors. Visitors may have decided against coming to the territory because of the crowds or the difficulties in finding accommodation.

→ Increased cost of public transportation (running the tourist shuttle around the Vieux Port for example).

→ Increased cost for public security.

As a result of the overall additional spending, it can be said that **2 800 possible full-time jobs** were either maintained or created. The additional economic activity can also be seen in a rise in the number of hours worked by existing employees (the tourism sector is notable for the high number of part-time jobs where additional hours can be worked). In order to determine the volume of employment activity arising from the increased number of tourists, a technical ratio (economic input per job, taxes included) was calculated using data from the business statistics study ESANE 2011.

[118] 1 394 questionnaires were administered in face-to-face settings and another 999 were filled out by the respondents with no supervision. This sample of respondents was taken to represent the ECC territory and the representative tourists to the Bouches-du-Rhône as determined by a 2011 study. The sample was then modified to take into account the profiles of the people who took part in the questionnaires. For example, one respondent might provide information on the spending of a large group of people (family, friends, etc.). From a technical point of view, this was accomplished by adding lines to account for the spending of people other than the respondent. Thus, the analysis includes 5 229 individuals. The group spending figures are divided by the number of people in the group.

Figure 51: Estimated number of jobs linked to the indirect economic impact (note: 100% of additional tourists are counted as part of the indirect impact, source: ESANE, CCIMP)

In €	Revenue per employee	Number of employees
Accommodation	170 209	980
Food services (restaurants, providers)	121 060	1 075
Leisure / culture	207 294	212
Retail (clothes, souvenirs...)	287 191	132
Regional transportation	126 712	389
Total	**153 577**	**2 789**

The estimates presented above can be confirmed by the accounts of local businesses. According to a study of small- and medium-sized businesses, businesses in the tourist centres of the territory, especially those in hotel and restaurant sectors, showed an increase in income and profit margins. It must be emphasized that these positive results were not spread evenly throughout the territory and that traditional tourist centres enjoyed larger economic benefits.

Finally, as a comparison, and to put the results in perspective, the ECC Ruhr 2010 estimated the economic benefits to include a 13.4% increase in the number of tourists, with a record 6.5 million overnight stays, which meant gross additional revenue of 90 million euros for the region[119]. As another example, Liverpool 2008 estimated there were 753.8 million pounds additional spending as a result of extra visitors[120].

The contribution of MP2013 and other factors

It appears that the ECC's contribution to the developments discussed above was sizeable. In effect, the **budget of the association itself counts as a direct economic impact**. It was also the MP2013 programme and the major MP2013 events that drew so many tourists to the territory.

The ECC succeeded in drawing visitors to the region at a time when **tourism at the national level was in decline** (other regions of the country reported stagnant or decreased levels of tourism).

The media also played a role in establishing Marseille and Provence as a global tourist destination and more specifically as a destination for a weekend visit or so-called 'city trip' (see tourism section). The media also played a notable role in letting foreign visitors know about the ECC, who tend to spend more time and money once in the territory than French tourists.

Finally, **businesses** played their part too by improving their services for the occasion and helping to promote the ECC, while the **residents** played the role of ambassadors for the year by inviting friends and family to events and hosting them in their homes, which resulted in numerous visitors and the associated economic benefits.

PRINCIPAL OBSERVATIONS REGARDING ECONOMIC BENEFITS

- 62 M€ (which represents 68% of the MP2013 association's budget) was spent locally for the production of cultural events with the MP2013 label.
- The estimated economic benefits derived from additional tourists and excursionists is roughly 428 M€.
- In total, the territory received close to 500 M€ in economic benefits that wouldn't have been generated without the ECC MP2013.
- It is estimated that close to 2 800 full-time jobs were created or conserved in 2013 as a result of these economic benefits.

[119] Source: Impact report 'Evaluation ex-post des capitales européennes de la culture 2010', Ecorys, August 2011.
[120] Source: 2008 impact report.

WERE ARTISTIC AND CREATIVE TALENTS DRAWN TO THE TERRITORY FOR THE LONG TERM?

What happened

Numerous projects recruited artists and technicians from around France, the Mediterranean basin, and farther afield (according to the association, a little less than 300 people in all). According to the survey of cultural actors, more than half of all co-financed projects (and one third of the branded projects) invited artists from the Mediterranean region. They moved to the region and contributed to the preparation and implementation of the ECC. Yet it is nonetheless difficult to determine a precise number of creative and artistic talents who arrived for the European Capital of Culture.

There are also very few indications that these people remained in the territory in 2014, or more particularly, that any of these artistic or creative recruits actually started their own activities in the territory after having participated in the ECC via the MP2013 association or one of the association's partner projects. However, we do know that cultural organisations recruited new personnel for the ECC and some of these recruits became permanent employees, so it is likely that a subsection of this group is people from outside the region (see Q1).

It should also be noted that the wealth of the new cultural infrastructure will permit new musical and artistic talent to be invited to the territory in the future. And certain organisations, such as the Friche La Belle de Mai, run numerous artist residency programmes that will continue to draw creative types, although these predated the ECC.

Finally, from a general point of view, there were very few elements available regarding the evolution of the creative industries in the territory on the occasion of the ECC or in connection with it. If there were changes in these industries, they will only be seen over a longer period of time.

The contribution of MP2013 and other factors

The ECC was charged with bringing artists to the territory and involving them in the cultural projects, and these goals were successfully met. However, it wasn't among the ECC's objectives to help implant these artists in the region after 2013. "As a general rule, the artists weren't supposed to stay," explained one of the association's leaders. What's more, there weren't even any specific measures put in place to retain the employees of the association, who, for the most part, left for other horizons.

Nonetheless, the ECC facilitated **the development of the tools and the systems to attract these artists** at a time when the territory was lacking in such initiatives. One need only look at the residences, the creative ateliers in Vitrolles, the exemplary infrastructure in Arles or the network of artist residences in Aix for proof of the new and improved environment. The Ateliers de l'EuroMéditerranée, the innovative programme of artistic residences put in place by Marseille-Provence 2013 under the impetus of the CCIMP and the Mécènes du Sud, allowed artists to be invited into non-traditional spaces such as private companies, public institutions, or social service agencies, while introducing new audiences to artist creation by involving employees and the general public in the process. By welcoming artistic creation from the Mediterranean basin, it also reinforced the bonds between Europe and the Mediterranean. Discussions are in place to make the Ateliers de l'EuroMéditerranée a permanent programme.

Thus, thanks to the ECC — via these ateliers or more generally the sponsorship of the project – **businesses and organisations began to work with artists**. This opened the door to new ways of thinking and these sorts of initiatives might well be continued depending on the interests and results enjoyed by all the concerned parties. A certain number of statements from local business indicate that they are leaning towards continuing these artistic relationships.

It is illuminating to consider the point of view of the artists and the businesses when considering the question of the ECC in terms of attracting more creative talent to the

territory. The study conducted among cultural actors that were supported or branded by MP2013 showed that nearly two thirds of them considered that the territory had **become more attractive for artists and creative talents**. This point of view is shared in exactly the same proportion by the businesses surveyed.

There remains a certain level of uncertainty in terms of the political climate, notably following the municipal elections, as to whether this policy of pursuing a cultural dynamic will continue and there will be further resources to host artists (specifically ateliers and incubators). There is also a great amount of uncertainty on the level of financing, particularly as a result of budgetary restrictions but also because of the demands of the new cultural infrastructure that need to be subsidized in the coming years (for more, see section starting on p. 46).

Figure 52: The perspective of cultural actors (those who organised projects) on the impact of the ECC (Answer to the question "From your point of view, what is most likely to happen after 2013?", Source: Euréval survey of cultural actors)

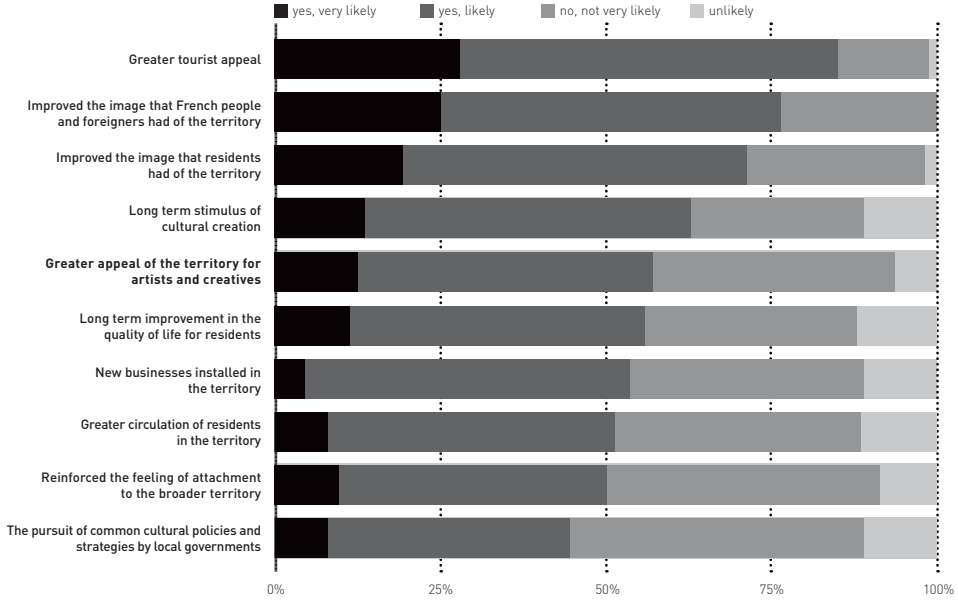
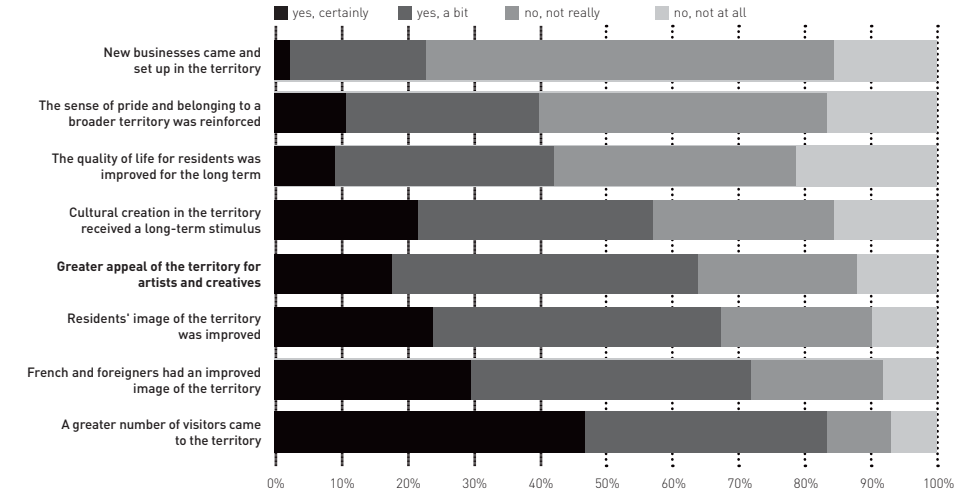


Figure 53: The perspective of businesses on the impact of the ECC (Answer to the question, 'More generally, would you say that Marseille-Provence 2013, European Capital of Culture, had the following effects on the Bouches-du-Rhône territory?', Source: business survey 2014)



It is thus probable that an array of factors — the flowering artistic scene that predated the ECC, the attractive cultural infrastructure, the enhanced facilities to welcome artists, the improved image for the territory, but also economic questions such as cheaper rents and more available spaces – will make it easier to attract new creative and artistic talent to the territory and this will be especially true if future policies embrace the cultural dynamic unleashed by the ECC.

PRINCIPAL OBSERVATIONS ON THE ATTRACTION OF CREATIVE TALENT

- More than half of the projects that were co-financed (and one third of the branded projects) invited artists from the Mediterranean basin who moved to the region and helped prepare and implement the ECC.
- It is difficult to estimate the exact number of creative and artistic talents who came to the region for the ECC, and it is even more complicated to determine how many stayed after 2013.
- For the moment, there is no way of determining if the ECC had any impact on the creative industries based in the territory.
- It is nonetheless likely that the legacy of the ECC (a better range of cultural infrastructure, more ways to host artists, a better image of the territory) will make it easier to attract creative talent to the territory.

DID RESIDENTS AND VISITORS END UP WITH A BETTER IMAGE OF THE TERRITORY?

One of the main objectives of Marseille-Provence 2013, European Capital of Culture was to "give the territory an image of being international, creative, and welcoming." This question of the territory's image, in particular that of Marseille, was a major consideration. In reality, while Provence has long benefited from a positive image, especially in regards to tourism, this has not been the case for Marseille.

What happened

The image a person has of a territory is either the result of first-hand experience, because they live or work or have visited the area, or because of what they have learned, notably, and perhaps overwhelming, in the media.
The original perspectives of the different parties must first be determined in order to see how the image of the territory evolved. Groups that will be considered are:

→ Residents of the ECC territory.

→ Businesses installed in the ECC territory.

→ Tourists and visitors who came to the territory.

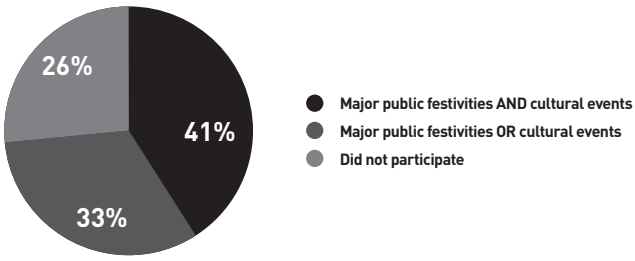
→ People, both French and foreign, who weren't able to visit the territory.

A positive change in the image of the territory for its residents

First of all, by early 2014, 97% of residents had heard about Marseille-Provence 2013, European Capital of Culture, and two thirds of residents had attended at least one event or visited a cultural site in connection with an MP2013 event. (Figure 54).

One resident in two attended at least one major event held in public space, which wasn't a certainty for a city like Marseille that wasn't accustomed to organise such complex cultural events. According to the MAGE study conducted by AGAM in April 2014, throughout the entire year and across the entire ECC territory, these major events gathered 1.8 million people and among them 75 to 80% were from Marseille (for more, see pg. 33).

Figure: 54 Participation of residents[121] (Source: Occurrence study for Euréval)

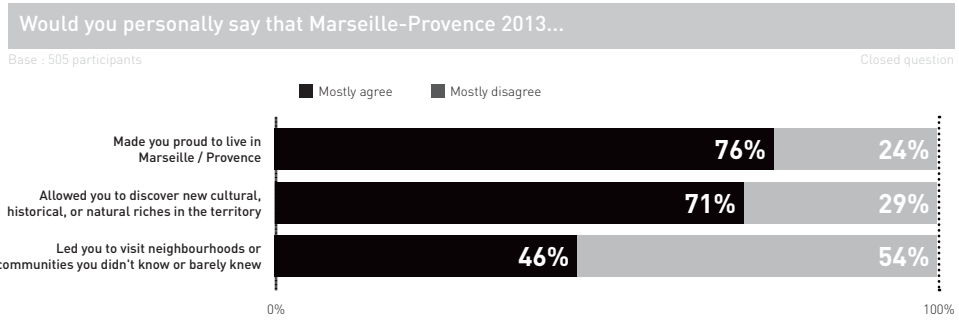


There was an appropriation (or the re-appropriation) of public spaces such as the Vieux Port (in its new configuration) and the J4 esplanade by people who had lost the habit of visiting the old centre of the city. A vast majority of residents of Marseille expressed a deep pride that the downtown core of their city was now more attractive. This sentiment was shared by residents of the broader agglomeration who attended events and rebuilt their bonds – which to that point had been weak – with the city of Marseille. Finallly, in terms of the ECC, it became clear after the final event of the year (*Révélations 8*) that the general public hoped these types of events would be repeated.

At the same time, the general mobilisation around the ECC inspired residents to travel more within the territory and to discover (or rediscover) these areas. There was a deeper sense of pride at being part of this territory.

[121] Combination of the questions "Did you participate in the major events organised by Marseille-Provence 2013 in public spaces?" and "Aside from the major events in public spaces cited previously, did you attend any other events or exhibitions within the framework of MP2013?"

Figure 55: The benefits of the ECC for residents (Source: Occurrence survey for Euréval)



According to another poll conducted in the autumn by BVA for Bouches-du-Rhône Tourisme[122], close to 60% of the department's residents indicated that their image of the city had changed for the better and 82% believed that Marseille had joined a new class of cities.

An improved image in the eyes of the region's businesses

Executives from all sizes of businesses in the region stated that they had witnessed an improvement in the image of the territory and that they had also heard similar observations among their professional networks. This sentiment was even more noticeable during the group interviews conducted with major companies from the territory, where many people stated they were proud of the territory for what it had accomplished ("*a beautiful success for a territory that sometimes lacks confidence in itself*"), what had happened in the public spaces ("*events gathering hundreds of thousands of people in public spaces without a single negative incident, it can be done!*"), and the urban renewal and evolution of the cultural infrastructure (seen as positive for both their current and future employees).

This was also the case for small- and medium-sized businesses. In a survey conducted in April 2014, spokespeople for this tier of businesses revealed that their sense of belonging to the territory and their pride for the territory both increased during the ECC. Of note, 65% of these same businesses felt that residents also improved their impression of the image. It is also interesting to observe that these results regarding improved image/ increased pride surpassed the stated expectations of these same businesses during a preliminary survey conducted one year earlier in April 2013.

The image of the territory for visitors

Marseille earned an image as a city of culture and historical heritage — Both tourists and business travellers changed the way they saw the city. A study conducted by BVA in September 2013 for the MP2013 association[123] showed that 33% of French people wanted to come to Marseille and Provence.

Above all, it was the image of Marseille that changed. For five years, Marseille's tourism and convention department posted a questionnaire for potential tourists on the tourist office's website. The principal goal of this questionnaire was to understand what type of tourists were considering a visit to Marseille and what type of vacation they wanted to take. Examining the 2 600 questionnaires filled out in 2013 showed the motivations for visiting Marseille had changed and this change was directly related to the ECC. Starting in 2013, it was the cultural attractions (museums, monuments, historical sites, etc.) that were the most cited motivations for visiting (81%, a 12% increase over the period running from 2009-2012), surpassing the regional's natural attractions (79%, a decrease of 2% over the period running from 2009-2012)39.

Tourists enjoyed their stay — According to the BVA study conducted for BDR Tourisme and the CCIMP in September 2013, **9 tourists in 10 wanted to return** to the department and **more than 9 in 10 would recommend the Bouches-du-Rhône** as a destination to their friends and family. Among the specific sites that were popular were the MuCEM, Notre Dame de la Garde and the Vieux-Port in Marseille and Cours Mirabeau in Aix-en-Provence.

By comparison, 84% of tourists questioned by the Chamber of Commerce and Industry in Lille in 2004 said they intended to return to the region and 96% would recommend a visit to the Lille area to friends or family.

[122] Source: José-Pierre Cholvy Consultant / BVA / Bouches-du-Rhône Tourisme - 2013.

[123] Survey carried out with a panel representative of the national population, cited in the MAGE study by AGAM.

[124] It is difficult to determine whether this difference was the result of changing tastes among those who could normally come to Marseille or whether a new market was created for people who enjoy culture, although other indicators suggest the latter scenario.

Other cities in the territory had their images bolstered — Marseille had the most work to do on its image, but it wasn't the only city that saw its reputation improved. Certain touristic centres like Aix or Arles saw their good reputations reaffirmed. Other cities showed an impressive new face during the ECC, notably industrial cities such as Gardanne or Martigues, but also other communities such as Istres, Salon, Marignane, Aubagne, or Vitrolles.

The contribution of MP2013 and other factors

The factors that played a role here are similar to those discussed in the tourism section (p. 67), with credit going to the general dynamic of the year, the clear role of the MuCEM, and the coverage of events by the media.

Contribution of MP2013

The ECC, an event with widespread recognition — The study conducted in September 2013 by BVA for Bouches du Rhône Tourisme[125] showed that MP2013 enjoyed widespread recognition:

→ Almost two thirds of French people (63%) heard about MP2013 (the majority through the programme 'Des Racines et des Ailes' broadcast on the France 3 television channel).

→ Among the people questioned, 33% stated they wanted to visit Marseille and Provence and 70% believed that the ECC allowed the destination to develop culturally.

The unfolding of the year — The fact that the ECC generally unfolded without major problems and from the beginning appeared to be a popular event, despite the notable criticisms toward the end of 2012, also helped change the image, especially considering it replaced a narrative that essentially focussed on criminal and judicial matters in the territory.

The MuCEM effect

Without going back over the role of the ECC in the arrival of the MuCEM, it is clear that this structure immediately became a jewel in the region's cultural crown and a primary reason to visit the territory.

It is interesting to draw a parallel here with Bilbao and the opening of the Guggenheim in 1997, 11 years after the closing of the shipyards, which instigated a radical change in the city's image that was boosted by an international communication strategy based on the theme of 'urban renewal':

Bilbao is the model for how a dialogue between city and port can be created around the pairing of economy and culture (Rodrigues Malta 2004). "In the future, no city will be economically important without also being culturally remarkable," declared Ibon Arezo, the city councillor in Bilbao in charge of infrastructure and urbanism (Masboungi 2001, pg. 104). Faced with the revenues of the Guggenheim museum and the enormous number of visitors, who already spill over into other cultural establishments in the city, coupled with an increase in the length of visits to the city and the development of the cruise lines, the important figures in the city were convinced that there were economic benefits, principally in the tourism sector, in having a major cultural institution with an iconic architecture. The success of museums as the anchors for major renewal projects is proof of a change from museum-curator to museum-entrepreneur, and is evocative of the use of culture for urban economic development policies (Vivant 2008)[126].

Marseille didn't share Bilbao's reputation of being an aesthetically ugly city. And Bilbao undertook a series of renovations over the past 20 years that furthered its policy of using architecture to cement its new image. Nonetheless, it does seem that a dynamic similar to that in Bilbao is in play in Marseille.

The other new structures and improvements also play their role in providing Marseille with this new dynamic and changing the territory's image, but they can't be said to have attained the same status as MuCEM.

[125] Survey carried out with a panel representative of the national population.

[126] Amélie Nicolas, French article 'Le projet urbain nantais: une mise à l'épreuve du modèle Bilbao', Métropolitiques, 23 June 2014. URL: http://www.metropolitiques.eu/Le-projet-urbain-nantais-une-mise.html

The involvement of local governments

Several local governments launched communication or promotional campaigns to correspond with the ECC. This is particularly the case with mid-sized cities such as Aubagne or Gardanne, cities with industrial histories that saw this as an opportunity to change their image.

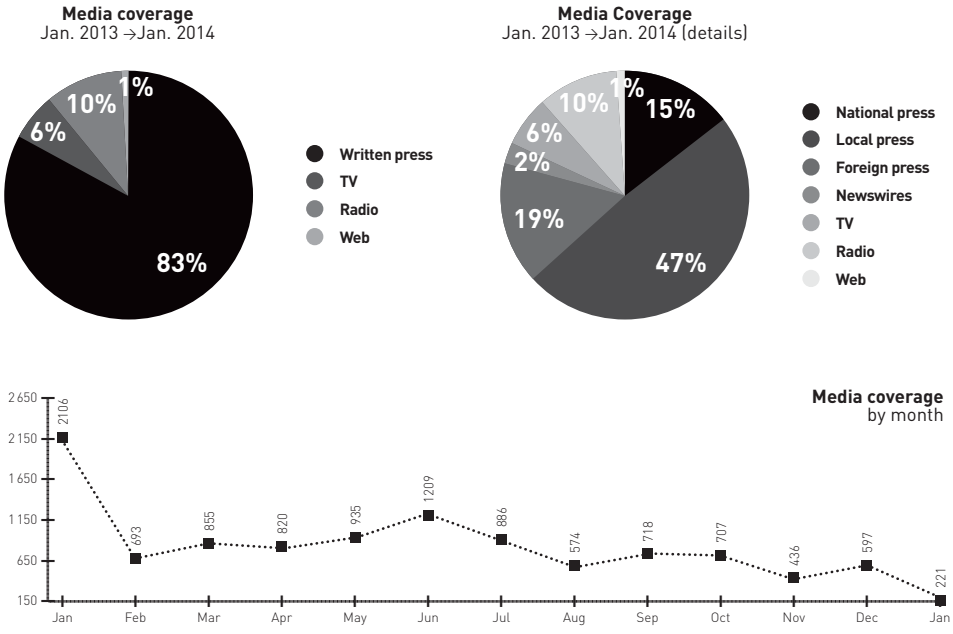
If, as previously indicated, these efforts were often poorly coordinated between cities, it is nonetheless probable that they played a role in the observed change in image of the territory, in particular among residents.

The essential role of the media

Mobilisation of the media — The MP2013 association successfully mobilised the media, notably with repeated calls to journalists. An analysis of coverage gives a good idea of the major place given to MP2013 by the media: from 1 January 2013 to 15 January 2014, there were **10 757 media mentions** (a higher number than for Lille 2004) and 19% of these were found in the international media. Media coverage spiked with the opening ceremony and again with the opening of the MuCEM in June 2013 (Figure 56).

Quantifying the coverage — Much of the media coverage was focussed on Marseille, but not all of it. At the *13 à Propos* forum, BDR Tourisme noted that on average 462 articles a month were written about cities in the territory in 2013 compared to an average of 90 in 2012. For the entire year of 2013, the most cited cities in European and French national newspapers were, in order: Marseille (3 646), Aix-en-Provence (965), Arles (657), Aubagne (369), Martigues (352), Istres (244), La Ciotat (208), Salon-de-Provence (189), Cassis (151), Port-de-Bouc (130), Les Baux de Provence (99), and Vitrolles (98). One way to measure this media coverage is to calculate how much it would have cost to purchase a similar amount of advertising space in these same newspapers; according to BDR Tourisme, it was the equivalent of a 60 M€ advertising purchase.

Figure 56: Media coverage (source: MP2013)



As indicated previously (see pg. 67), it was the local and international media who led the way in terms of providing massive amounts of positive coverage. The quality of the partnership with the local media was also emphasized by numerous participants in the project:
"It was the first time that culture was so often on the front pages of La Provence and La Marseillaise." -- (A cultural organisation)

In Europe, it was the Germans, Italians, Austrians, and Belgians who gave the most coverage to the ECC. The world service of the AFP also played an essential role by distributing coverage to media in countries around the world.

Qualifying the coverage — If the image given to the territory in the press was generally positive, it should be noted that this image had evolved over recent times, especially in the particular case of Marseille.

The qualitative analysis of the media coverage conducted for this report made it clear that 2013 was a **pivotal year for the image of the territory** in the media. The coverage of Marseille radically changed in tone: the constant criticism of the city by the national press – or the 'Marseille-bashing' local figures complain about – was slowly replaced by a more encouraging trend in coverage. By the end of the year, the media presented a city that had found peace with its residents, notably as a result of improvements to its public spaces and municipal infrastructure. At last, Marseille shone in the media:

→ Regionally, it was once again considered a cultural centre along the lines of Aix.

→ Nationally, it confirmed its status as the second city of France, capable of providing a counterbalance to Paris in the cultural domain.

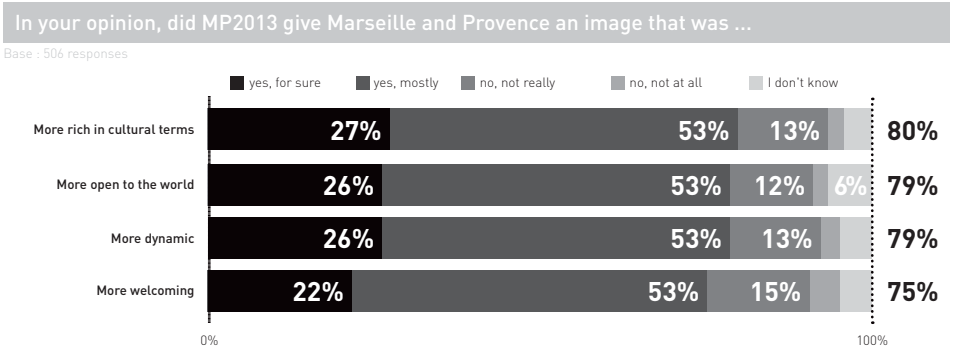
→ Internationally, it became a hot new destination, similar to what happened with Barcelona after the Olympic Games of 1992.

In their narrative, the media spoke of a Marseille of the future, a dynamic that that local politicians hoped to further develop in 2014.

As for the other cities in the territory, the media treatment generally had a very positive tone from the very beginning. And the communities each had specific strategies to participate in events in a way that would extract the greatest publicity benefits.

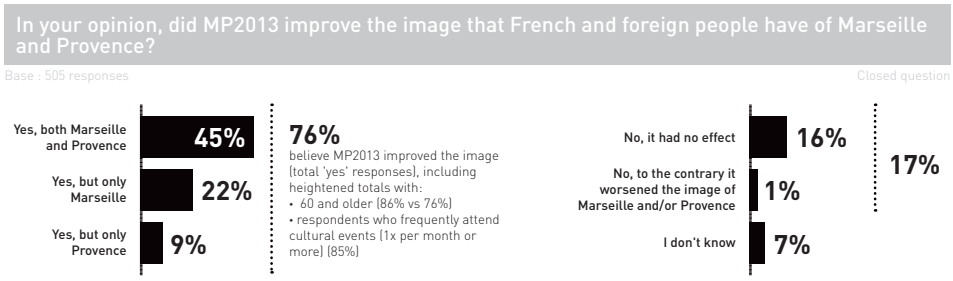
Globally, as the reaction of residents showed in the previous section, the ECC helped enrich the territory's image as a place with a wealth of culture that is more open to the world, more dynamic, and more welcoming. MP2013 also led French people and foreigners to improve their opinion of Marseille and Provence.

Figure 57: Perspective of residents on the contribution to the image of the territory (Source: Occurrence survey for Euréval)



People from Marseille and respondents who frequently attend cultural events (1 a month or more) generally consider that MP2013 gave Marseille and Provence a more welcoming image (79% and 80% respectively vs 75% overall).

Figure 58: Perspective of residents on the improvement of the image in the eyes of French people and foreigners (Source: Occurrence survey for Euréval)



PRINCIPAL OBSERVATIONS REGARDING THE EVOLUTION OF THE TERRITORY'S IMAGE

• The European Capital of Culture directly contributed to improving the image of the territory among residents and, to a lesser extent, among local business leaders. The feelings of pride and belonging were also enhanced by the 2013 experience.

• In the eyes of tourists, Marseille became a city of culture and heritage. For the first time in 2013, prospective visitors to Marseille cited culture more often than natural attractions as the reason they wanted to visit.

• 2013 was a pivotal year for the image of the territory in the media. The media coverage of Marseille in particular changed dramatically, going from systematic criticism of the city in the national press to general good will toward the city.

• With the arrival of MuCEM, Marseille underwent a change in image similar to that experienced by Bilbao with the arrival of the Guggenheim Museum.

• Other cities in the territory — such as Arles and Aix but also Gardanne, Martigues, Istres, Salon, Marignane, Aubagne, and Vitrolles — also saw their reputation enhanced.

CONCLUSION: WAS THE TERRITORY MADE MORE ATTRACTIVE FOR THE LONG TERM?

To conclude, it is helpful to answer the broader question of what impact the ECC made in terms of improving the territory's image and what are the prospects for the future.

What happened

As we have seen in the previous sections, numerous factors were responsible for making the territory more attractive:

For culture aficionados — The cultural options were expanded and more widely known outside the territory. Beyond the cultural organisations that will endure after 2013, the territory developed permanent cultural infrastructure, some of which is already gaining international acclaim (notably the MuCEM). The territory is also progressively structuring itself around specific cultural poles, such as opera in Aix-en-Provence, photography and archaeology in Arles, and a new focus on street arts such as circus in the greater Marseille area. At the same time, the different organisations are continuing to coordinate their efforts (see p. 43). This new system remains limited and irregular, but it is a change for a territory that was previously known for the absence of coordination regarding cultural infrastructure and cultural programmes[127].

For residents and businesses — The new cultural infrastructure and the urban renewal efforts improved the living and working environment, especially in downtown Marseille. The territory is easily accessible by plane (new routes), by high-speed rail, by sea, and by road. The implementation of the Pass Transport for travel throughout the territory was an important step[128]. Sadly, despite this progress, public transportation remains problematic and it is often difficult for residents to commute. Certain neighbourhoods in Marseille remain hard to access and certain areas of the territory are poorly served in terms of regional transportation. However, there is some infrastructure work underway or in the planning stages: notably the modernisation of the rail system and the extension of the metro and tram systems.

Tourists in general — The Marseille-Provence territory found itself in a better position in terms of tourism and consolidated its reputation for culture. It succeeded in attracting new visitors (the so called 'city trip' subset of foreign visitors) during a period when the national tourism industry was suffering. The increased and improved options available in the territory's tourism sector, notably in terms of tourist itineraries and museum passes, are meant to be permanent changes.

International observers — One indicator of the new interest taken in the territory is the large number of foreign delegations that visited the region in 2013. The MP2013 association alone received 180 official or professional delegations (this includes both 2012 and 2013) and then there were additional delegations hosted by local governments, business partners, and the French national government, as well as the presence of foreign officials at the major events[129]. The Marseille city hall, for example, organised the welcome of 186 delegations in 2013 (close to 1 200 people), three times as many as in previous years.

For one and all — The image of the territory improved in the eyes of residents, businesses, and tourists from France and abroad, notably as a result of positive media coverage that presented a new vision of the city and region.

[127] See B. Grésillon, mutl-scale analysis of a European Capital of Culture, previously cited.

[128] This programme was based on an agreement signed between the concerned local goverments, which established reductions of roughly one third on all tarifs with the Pass and sharing receipts from sales of the Pass.

[129] Opening weekend, inauguration of MuCEM, presentation of The Mediterranean, A History to Be Shared project, etc.

The contribution of MP2013 and other factors

The European Capital of Culture acted as a catalyst and an accelerator when it came to the appeal of the territory. It didn't play the only role in this improved image, there was also the ensemble of projects and developments that were already underway. Yet it helped raise the curtain on these changes and allowed the territory to prove, as so many people noted, that 'We can do this and we can do this together'. It also confirmed the fact that culture is an important ingredient in a territory's appeal and it can push a territory to greater heights. It can definitely be said that there was a sense of a 'before 2013' and 'after 2013' within the territory.

The image of the territory was thus improved, but perhaps not in the same way everywhere and not with the same permanent effect:

→ The ECC clearly helped enhance the **appeal for tourists**, putting the territory and particularly Marseille in the spotlight. The range of 'cultural tourism' options was improved for the long-term, but there is still work to be done when it comes to cooperating on projects and communication strategies.

→ The ECC helped improve the **appeal for people and creative talents**. The structures for hosting artists were expanded or improved, the image of the territory was 'normalised', there were improvements to the living and working environments and the range of cultural options available. This should help local businesses attract creative talent and high quality employees, which is important for companies in the region that are competing with other major cities for highly qualified personnel. There is still room for improvement, notably by facilitating the movement of people within the territory.

→ The ECC also helped improve the **appeal of the territory for world travellers**, by putting it on the map in America and Asia and giving the territory a more dynamic, creative image. It gave the city a new face, it capped off 20 years of urban renewal, and it positioned the city as a rising star among international decision makers who might consider the region for new investments or developments because of its place on the Mediterranean, its port, its infrastructure, and its energy. Yet without a solid strategy and active joint marketing policies for territory, this surge in visibility is at the risk of being temporary.

In conclusion, certain aspects of the improvement to the territory's image can be qualified as permanent and will not be lost in the near future. Yet the experience of other cities that benefited from the ECC designation shows that the dynamic must be maintained if the effects are to endure. Thus, the final answer to whether this improved appeal is viable in the long term depends on the joint decisions of the local political and business figures.

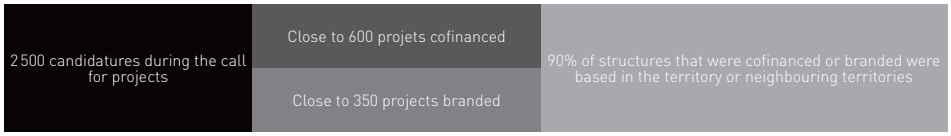
Conclusion – Summary

The European Capital of Culture (ECC) Marseille-Provence 2013 was held from January to December 2013 across a territory that was roughly the same as the Bouches-du-Rhône department. The Marseille-Provence 2013 association (MP2013) and the various partner groups sought to assess the impact of the year in terms of changes in the practices of cultural actors and the appeal of the territory. The assessment process incorporated numerous procedures: an analysis of documents, an analysis of media coverage, individual and group interviews with members of the cultural, institutional, and political communities, first-person observations, and surveys of residents, small- and medium-sized businesses, and the groups that managed co-financed and branded projects.

ANSWERS TO THE EVALUATION QUESTIONS

Q1: In what way did the ECC induce changes in the practices of cultural organisations across the territory?

Q 1-1: Did all (local) cultural organisations have access to the MP2013 project?



What happened — Within the framework of the European Capital of Culture, around 600 projects received financial support (either produced or co-produced) and another 350 projects were branded, which is to say included in the official programme but without receiving financing. In terms of the programme, 80% of the supported projects could be classified as modest (co-financing of less than 150 000 euros) and were essentially managed by local cultural actors. These cultural actors generally were existing structures that already received public subsidies prior to the ECC.

The financed projects were carried out across the territory, in particular in the downtown cores of the major urban centres where the cultural infrastructure is concentrated. Nonetheless, a number of projects were organised in rural zones or disadvantaged urban neighbourhoods, particularly through such initiatives as the *Quartiers créatifs*.

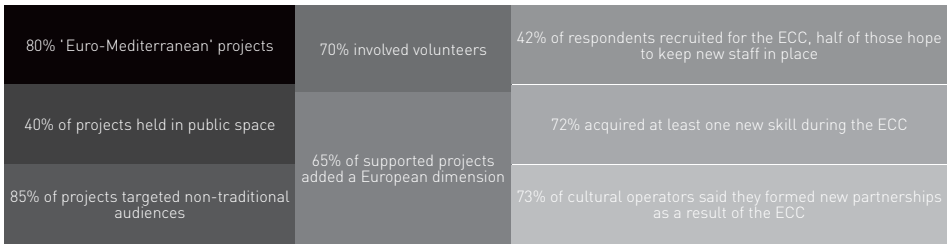
The final programme included projects from a broad range of artistic and cultural domains, although urban culture was under-represented considering the vibrancy of the rap community in the territory. The ECC was also an occasion for other individual and collective artistic projects, notably those organised within the framework of the Off.

The contribution of the ECC — Initially, the ECC programme was intended to be focussed around a few key organisations. But the call for projects and the resulting 2 500 proposals that were submitted resulted in a change of plans. Despite the frustrations and suspicions of certain people involved in the process, the call for projects led the association to significantly enlarge the programme for the year to include more modest projects and it also created the branding system in order to embrace projects it couldn't finance.

ECC had only incorporated a few new or alternative cultural actors, it was partially due to the fact that the association gave preference to existing organisations with a track record of major projects to ensure that the proposed events would be well managed. The location of projects throughout the territory was also a result of each local government wanting a return on the money they invested in the ECC.

For small cultural actors, the call for projects was a barrier to entry as they generally didn't have the experience or know-how to properly submit their proposals. Ultimately, the association was able to integrate a few of these smaller groups through the *Quartiers créatifs* initiative, although this process wasn't without difficulties and in a few cases ended in failure.

Q 1-2: Did local cultural actors improve their practices as a result of the ECC MP2013?



Source: Eureval survey of projects receving support from MP2013.

What happened — The groups that organized projects[130] developed them in response to guidelines from MP2013, which might have led to an improvement in practices. Among the guidelines were initiatives to adopt a Euro-Mediterranean theme and a European dimension, to use public spaces, and to attract audiences who don't usually attend cultural events, such as residents of disadvantaged neighbourhoods or people without resources, by connecting with community organisations and ensuring events are physically and financially accessible for everyone.

Nearly three quarters of organisations that managed cultural projects during the year acquired new skills or improved their existing skillset, notably in such domains as forming institutional partnerships, project management, project creation, and communication strategy. For the most part, these newly acquired skills have been used again since the end of the year. These new skills were essentially learned 'on the job'; recruitment was mostly focussed on dealing with the increased workload as opposed to acquiring new expertise. And if there had been a great deal of professional training within the ranks of the participating cultural organisations in recent years, it appears that this training had little to do with the projects connected to the ECC.

Finally, the cultural actors selected to take part in the ECC were able to develop extensive new partnerships or strengthen existing collaborations with other cultural organisations, local governments (who often acted as financial partners), and social service organisations (who were involved in both the creation and implementation of projects).

The contributions of the ECC — Even though the criteria imposed by the association was not very constraining and numerous cultural organisations ultimately altered projects after they had been accepted as part of the official programme, MP2013 still had a role in shaping them. This was mostly as a result of the financing they provided and the resulting embrace of the Euro-Mediterranean theme, the creation of extraordinary projects, and the emphasis on accessibility for all audiences.

As for the rests, both skills and partnerships were essentially developed within the framework of the project or were already in existence. The contribution of the ECC was to have made these projects possible but also to have influenced these organisations to seize the opportunity to increase their visibility and attempt more audacious projects.

Q 1-3: Did cultural organisations succeed in reaching their audiences thanks to MP2013?

What happened — Whatever way you want to parse the attendance figures for the year, the numbers are high: more than 11 million visits, 1.9 million extra visitors to the territory, and three quarters of residents of the Bouches-du-Rhône attending at least event during the year, which amounts to 1.45 million people.

[130] The statistics concerning the organisations that managed projects are the result of a study of co-financed organisations (75 organisations involving 100 projects) and branded projects (59 organisations for 80 projects).

The visits were concentrated: a dozen major events accounted for 50% of all visits and the MuCEM alone was responsible for 20% of visits. But, the vast majority of cultural actors in Marseille and throughout the territory were satisfied with their attendance (regardless of the size of their event).

The audiences, whether they be tourists or residents of the territory, were equally satisfied with the events that they attended or participated in. The level of satisfaction grew throughout the year and was highest among older audiences and audiences who regularly attended cultural events.

If the middle-class and intellectual community were more likely to attend events, nonetheless half of organisations believe their events attracted a more socially diverse audience than usual. And the events in public spaces were more pronounced in their ability to draw audiences beyond the normal cultural milieu, both from the eastern parts of Marseille and mid-sized cities across the territory. On the other hand, residents from the northern neighbourhoods of Marseille, a notoriously disadvantaged community, were more apt to participate in projects that directly concerned them.

Finally, at least half of all students in the department, and probably considerably more, were able to participate in at least one event within the framework of their studies, a figure that corresponds to roughly 250 000 students.

For all these ECC events, the level of involvement by the public varied largely, from a simple walk outside to take part in a festivity to, in a few cases, an actual physical contribution to the artistic projects. Even if only 3% of residents feel they concretely contributed to projects, this still represents roughly 50 000 people.

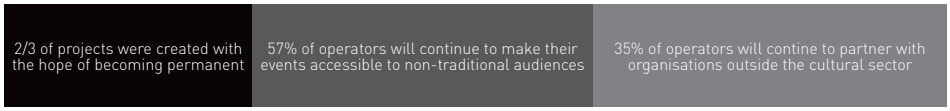
The contributions of the ECC — Multiple factors contributed to the attendance success of the ECC. Notably, the ECC inspired a dynamic that motivated both tourists and residents. The length of the year was also a bonus, as was the wide variety of events on the programme that allowed everybody to find something they wanted to participate in.

The ECC also helped local cultural actors, allowing them to enjoy larger audiences than normal. The struggles with the communication strategy that were notably suffered during the first semester were compensated for by extensive coverage of the ECC in the local press.

In regards to people who didn't normally attend cultural events, the ECC's criteria pushed organisations to better take into account the question of accessibility. The willingness to address these audiences and the implementation of events in areas that were traditionally under-served by culture were essential steps, but not necessarily enough to facilitate their involvement. Longer terms projects, whether or not they fall under the mandate of the ECC, are more likely to obtain the desired results.

On the other hand, the mobilisation of local governments in terms of the involvement of schools and the relationship between culture and social services was a major factor in creating new audiences for culture. The same can be said for the efforts made by major companies to involve their employees.

Q 1-4: Were practices of local cultural organisations modified for the long term?



Source : Survey of cultural operators

What happened — The cultural actors selected for financing or branding often conceived their projects in a way that could lead to them becoming permanent and one third of these organisation have already found the means to do this. What's more, these cultural actors hope to continue to integrate certain values of MP2013 into their future projects, in particular greater access for diverse publics and collaboration with partners beyond other cultural organisations. There are currently numerous collaborations between local governments and between local governments and cultural organisations.

Many organisations tried to implement medium- or long-term cultural development strategies, for which the ECC served as a springboard for greater visibility and resources. This was also the case for local governments: for example Marseille, Arles, or Aubagne. It remains to be seen to what measure these strategies will eventually bear fruit.

It should be noted that the experience of other cities that hosted the ECC shows us that the long-term effects are in no way guaranteed: in certain cases, the situation slowly returned to normal.

The contributions of the ECC — As indicated earlier, the process of planning and implementing the events for ECC played a role in modifying the practices of associated organisations. With the closing of the association, the partnerships it had formed with local cultural actors came to an end and the partnerships it had facilitated were weakened, which combined to undermine the legacy of the ECC. This is why the goodwill of involved parties (in the development of projects and partnerships) is such an important factor in terms of the ultimate changing of practices of local cultural organisations.

The areas of uncertainty are, on the other hand, numerous. The recent municipal elections led to a delay of several months in addressing the questions regarding the strategy for after the ECC and also changed the landscape of local politicians with several who vocally supported the ECC leaving office. For the public servants in the local governments, it will be a long and delicate process to convince the newly elected officials to commit to the measures required to maintain the ECC's legacy.

At the same time, the financing of culture raises other questions. If the budgets remain the same, a large part of them now must finance the new structures in the territory and help these structures develop their own cultural programmes. Local cultural actors fear they will no longer receive operating grants, only subsidies on a project-by-project basis. Yet, it is only adequate financing that can maintain the professional functioning of the organisations that was seen in 2013.

Q2 – In what way did the ECC influence the appeal of the territory?

Q 2-1: Did the major figures across the territory get involved in the preparation and execution of MP2013?

Source: MP2013 and surveys of residents and small- and medium-sized businesses by Eureval and Occurence

What happened — Members of the business community became involved very early in the process and heavily invested in the project, both by collaborating with cultural organisation and by financing projects (207 sponsors, including small- and medium-sized businesses, for a total contribution of 16.5 million euros). Certain businesses also created new services or products, or adapted existing ones, for the ECC.

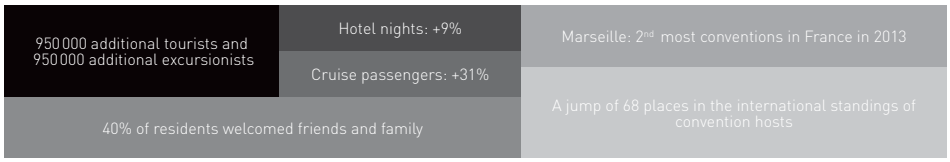
Public institutions also played a major role in the early process, by financing the association and its projects, and also by accelerating their existing programmes of investment in urban and cultural infrastructure. They also aided in the communication efforts for the year, although these efforts could have been better coordinated.

The cultural organisations were also heavily mobilised (see Q1.1) and residents too embraced the project, participating in different events and exhibitions (more than 2/3 of residents attended at least one event) and by recommending that their friends and family from outside the territory visit the ECC (70% recommended a visit to friends or family and 40% welcomed these people into their home).

The contribution of the ECC — Several factors explain the deep involvement by so many different groups. First, there was a shared desire for change and to improve the image and appeal of the territory. Then, there were several key people and organisations – Bernard Latarjet, Jacques Pfister, and Jean-Claude Gaudin, and the chamber of commerce and local governments – who worked to get as many people involved as possible.

The ECC, and its underlying association, played the role of both catalyst and accelerator for projects, triggering an unprecedented dynamic in the territory. It was also successful in reaching out to media, particularly the local press, to interest them in the project.

Q 2-2: Did more tourists come to the territory for MP2013?



Source: BDR Tourisme and CCIMP

What happened — Large numbers of tourists came to the territory in 2013. Despite already being a tourist attraction, the territory nonetheless was able to attract close to 2 million additional visitors compared to the previous year, and this was during a period when the tourism industry was suffering across the rest of France. The hotel sector recorded positive numbers (a 9% increase in total nights, an 11% increase in arrivals, an increase in the overall occupancy rate and in the number of first-time visitors). The cruise ship sector also benefited from an increase in tourism (a 22% increase in the number of cruises using Marseille as home port and a 40% increase in cruises stopping in the city). Business travellers, conventions, home stays, and use of the tourism offices also saw important growth. At the same time, visitors in 2013 travelled more extensively throughout the territory than visitors in previous years.

The contributions of the ECC — The ECC made an important contribution to the surge in tourism. The range of cultural options that resulted from the programme was one of the major results for the increased tourism. The media, especially local and international, also played an important role in the increased numbers. The national media only took a positive approach later in the year but did spur more French tourism starting in the spring of 2013.

Certain initiatives, such as the creation of the Pavillon M and the renewed commitment of the tourism offices, made life easier for tourists.

On the other hand, the communication by the ECC and the marketing aimed at tourists encountered difficulties early in the year. This partly had to do with the teeming programme that was difficult to understand and a lack of coordination among the different jurisdictions and organisations when promoting events.

Q 2-3: Did residents and businesses in the territory see a long-term improvement in their living and working environment as a result of MP2013?

Source: surveys of residents, small- and medium-sized businesses, and project organisers by Eureval and Occurence

What happened — Marseille and a certain number of other cities in the territory saw their public spaces transformed. New structures (MuCEM, Villa Méditerranée, Musée Regards de Provence, etc.) appeared and existing structures were renovated (Château Borély, Palais Longchamp, Musée Granet d'Aix, Eden Théâtre of La Ciotat, Friche la Belle de Mai). These changes didn't only concern the cultural infrastructure as there were also important urban renewal programmes, notably linked to Euroméditerranée. The Marseille waterfront, in particular, was profoundly changed with residents now enjoying

new access to the sea along a broad swathe of the port. The territory's natural heritage was also put in the spotlight (notably with the Parc naturel régional des Calanques and the GR®2013). The hotel options were improved as were the transportation options (Pass Transport MP2013, City Pass, expanded metro hours, new bus lines, water shuttles). Residents, like the tourists, quickly made use of these new spaces.

The contributions of the ECC — Evidently, the ECC didn't help finance this new infrastructure or the urban renewal programmes (this was the role of the French national government, Euroméditerranée, and the local governments). Nonetheless, it did play an indirect role by playing the part of catalyst (encouraging projects, give them a raison d'être, and facilitating the investment of funds in projects that were on standby or considered dead) and a formidable accelerator (by establishing a deadline of 1 January 2013).

More directly, the association helped streamline the process, providing a coordinator for the various construction sites, a coordination committee, and above all an informal meeting place for the different financiers. At the same time, it also directly contributed to the cultural programming, which led to events being held in public spaces and an improved sense of civic harmony.

Finally, more than one third of residents, businesses, and organisations surveyed stated that they considered the ECC to have improved the living and working environment in the territory for the long-term.

Q 2-4: Did local businesses and individuals enjoy economic benefits from the organisation and attendance of the ECC?

Source : CCIMP, BDR tourisme et MP2013

What happened — According to the study '*Impact économique Marseille-Provence 2013 Capitale Européenne de la Culture*' conducted by the CCIMP in partnership with Bouches-du-Rhône Tourisme and the MP2013 association, 665 M€ was invested in more than 60 construction projects that would become emblematic of MP2013, to which must be added 130 M€ in improvement projects that would affect the tourism industry and 270 M€ invested by the hotel industry. These investments were made as part of the overall project to improve the cultural and tourist appeal of the territory. Although the ECC wasn't directly involved in these investments, once again they participated in the '2013 effect' and obviously will have a long-term legacy. In the end, however, it is very difficult to determine how much of the total investment cited above went to local companies, although it seems to be a significant portion. In any case, whatever this portion was, it wasn't used in the calculations of economic benefits presented here.

Studies showed that the total economic benefits for the territory were close to 500 million euros[131]. This accounts for all economic benefits that the territory wouldn't have received if it hadn't been the European Capital of Culture in 2013. Along these same lines, the economic benefits resulted in close to 2 800 full-time jobs created or conserved in 2013[132].

The contribution of the ECC — The ECC's contribution was important on two levels:

→ The economic benefits are either *directly linked to ECC projects* (financing cultural events and the associated economic activity) or indirectly linked (infrastructure work and urban renewal associated with the ECC).

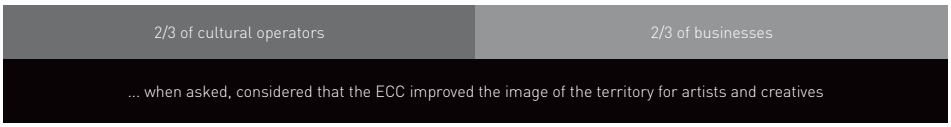
→ Or the economic benefits were linked to the *results and impacts of the ECC* (financial benefits of the increase in tourism and the extra spending by visitors to the department).

At the same time, media, businesses, and residents who helped promote the ECC also contributed to the economic benefits as a result of any visitors they might have helped attract.

[131] This estimate takes into account 62 million euros that were spent locally to produce cultural events for MP2013 and 428 million euros in additional economyic benefits linked to the increase in tourism over 2012. The method of calculation involves adding the number of new tourists (+910 000), the number of tourists retained because the region didn't suffer the nationwide tourism stagnation (+38 000, the increase in the number of excursionist or people from neighbouring departments who took day trips to the territory (+950 000) and then multiplying it by the average daily expenditure by each tourist (66 euros) and excuriosnist (26 euros).

[132] In order to determine the volume of economic activity linked to the increase in tourism spending, technical ratios (turnover including tax per employee) were calculated based on the study ESANE 2011 (Élaboration des Statistiques annuelles d'entreprises).

Q 2-5: Were creative talents and artists drawn to the territory for the long term?



Source: surveys of project organisers and small- and medium-sized businesses by Eureval

What happened — A great number of projects recruited artists and technicians from France, the Mediterranean basin, and the rest of the world. They moved to the territory and contributed to the preparation and the execution of the ECC. It is difficult to estimate the number of these creative and artistic talents who remained after the ECC. But, thanks to the survey of cultural actors, we do know that a certain number of people recruited for the ECC were kept on as permanent staff after the year ended.

What's more, the new cultural infrastructure put in place for the ECC is permanent and will continue to draw creative and artistic talent. Also, whatever relationships were formed during the ECC they might endure. Finally, while many of the bigger structures and local governments have committed to continuing their work with culture in the years to come, there remains some uncertainty regarding financing and political will and this could affect the territory's ability to retain its creative talent or attract new talent.

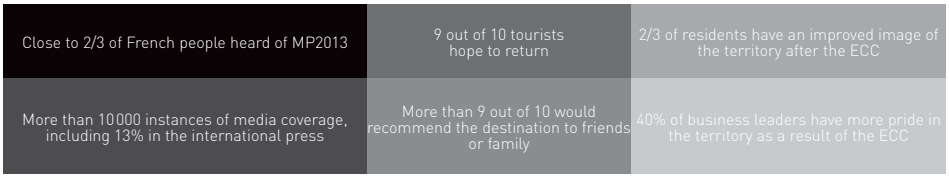
From a more general point of view, very little information was collected on the evolution the creative industries in the territory in connection with the ECC.

The contribution of the ECC — It was the ECC's mission to bring artists to the territory and integrate them into the official MP2013 programme[133] and it fulfilled this goal in an impressive manner, but it was never the role of the association to ensure artists remained in the territory after 2013. Nonetheless, it did help contribute to this possibility by helping to organize facilities (artist residences and ateliers) that could welcome talent in the future and fostering relationships between creative talent and the institutions and businesses that might continue (specifically, the Ateliers de l'EuroMéditerranée).

The surveys of cultural actors that were financed or branded and small- and medium-sized businesses showed that 2/3 of them considered that the territory had become more attractive for artists and creative talents.

[133] According to the survey of cultural organisations that were financed or cofinanced by MP2013, half of them recruited artists from the Mediterranean basin (and 1/3 for branded projects).

Q 2-6: Did visitors and residents develop a better image of their territory as a result of the ECC?



Source: MP2013, BVA for BDR Tourisme and surveys of residents and small- and medium-sized businesses by Euréval and Occurence

What happened — Many different sectors consider that the image of the territory has changed. First of all, residents, who participated in the ECC's major events in massive numbers rediscovered their cities' public spaces and showed renewed pride with 76% of residents surveyed saying they were prouder to live in the territory after the ECC. This was also the case for business leaders, with 40% of them declaring themselves to be more proud of their territory and 65% of them believing that the residents now had a better image of their territory.

For their part, tourists and visitors were left with a good impression of the territory. According to studies, 9 out of 10 tourists would return to the territory and more than 9 out of 10 would recommend the territory as a destination to their friends or family.

At the same time, Marseille earned a reputation as a cultural city that was welcoming and dynamic. At the national level, 2 out of 3 people had heard of the ECC MP2013, 1 in 3 wanted to visit, and 2 out of 3 considered that the ECC had improved the territory's cultural reputation. It is also interesting to note that the motive for visiting Marseille changed; it is not longer the natural attractions that are the prime attraction, but rather the new cultural dynamic.

Other cities saw their reputations enhanced, notably industrial cities such as Gardanne and Martigues and also other places like Istres, Salon, Marignane, Aubagne or Vitrolles.

The contribution of the ECC — It seems clear that the ECC helped improve the image of the territory. The MP2013 association was able to mobilise media, especially local media, and helped engage journalists with the ECC. Overall, 10 757 media stories were identified[134], 19% of which were in the international press.

In terms of positive news coverage, the ECC made a particularly important contribution in Marseille and to a lesser extent in Arles and Aix.

The local, national, and international media presented a positive image of the territory, which helped transmit the same image to residents and visitors. The year 2013 was pivotal for Marseille, which went from suffering negative coverage and 'Marseille bashing' to being the subject of glowing coverage in the regional, national, and international media.

In conclusion: Was the territory's appeal improved for the long term?

What happened — A multitude of factors – the blossoming of the artistic scene that pre-dated the capital, the new cultural infrastructure, the improved programmes to welcome and host artists, an improved image, not to mention an abundance of space and reasonable rents compared to elsewhere – helped create a situation where it was easier to attract creative talent to the area. At the same time, recent years have seen new efforts at cultural collaboration from diverse sectors that often didn't communicate. Across the territory, figures from public institutions, business communities, and cultural organisations joined forces to achieve the common goal of improving the cultural appeal of the territory.

The ECC's contributions — The European Capital of Culture acted both as an instigator and accelerator for the improvement of the appeal of the territory. It wasn't alone in this role, without the development projects that were launched before the ECC this couldn't have been accomplished. Yet it was the ECC that shone the spotlight on the territory to reveal this new face and it also confirmed that the territory could work together and that culture could serve as a way to enhance a territory's image.

The ECC clearly helped strengthen:

→ **The appeal of the territory for tourists**. This was accomplished by putting the territory, and particularly Marseille, under the spotlight. The array of cultural options was improved for the long term but there still needs work to be done when it comes to collaboration and joint communication strategies.

→ **The appeal of the territory for creative talent**. The structures to welcome and host artists were improved, the territory's image became 'normalised', the quality of life and the cultural options were enhanced. This should help the territory's businesses recruit the employees they need. There still remains work to be done in facilitating people's movements throughout the territory.

→ **The international appeal of the territory**. The ECC put Marseille on the map for world travellers, including those from America and Asia, by giving it a more creative and dynamic image. The ECC provided a stage for the territory and highlighted the past 20 years of urban renewal so that international decision makers will decide to invest in the region (for its location on the Mediterranean, its port, its infrastructure, its energy). However, without a specific strategy and a concentrated political effort to market the territory, the gains in visibility could be temporary.

The appeal of the territory was thus improved, but not all parts of the territory reached the same level nor was there the same guarantee for long-term change. Certainly, some structures are firmly in place and there will be no turning back for them. But, the experience of other ECCs shows that the dynamic must be maintained if the effects are to endure. Thus, the question of whether this new appeal of the region will continue long into the future relies on what the local political, institutional, business, and cultural communities decide to do.

[134] From 1 January 2013 to 15 January 2014.

AND TOMORROW?

Today, the metropolitan nature of the MP2013 territory is incontestable. More than the newfound collaborations between various jurisdictions, it is the residents themselves who attest to this synergy in they way they live and embrace the territory. The ECC emphasized this united energy of the territory and its dominant role in shaping its future.

The current impact assessment shows numerous positive changes for the territory:

→ Local cultural actors strengthened their skillsets and raised their ambitions as a result of their participation in the ECC and they gained a new level of visibility. They also proved that it was possible to work together on a major project and that this style of collaboration can bear fruit.

→ Beyond the purely economic benefits of the ECC, the territory has emerged with new and renewed infrastructure that will continue to benefit tourists and residents alike, even if this infrastructure is mainly concentrated in the touristic neighbourhoods of the cities. These infrastructure changes were either instigated for the ECC or accelerated in order to be finished in time for the ECC.

→ Above all else, Marseille and Provence earned a new image as a place with a dynamic cultural scene, an image that could benefit both future tourism efforts and the economic appeal of the territory. Residents felt a renewed pride for their territory during this time and they are hopeful the good image will endure.

Many of these changes are concrete. But the experience of previous European Capitals of Culture shows that the event can serve as a springboard to develop more ambitious development strategies (such as what occurred in Lille and Liverpool). Or, without additional initiatives, the situation could also slowly return to normal.

These strategies could be put in place and further develop the relationships that were built during the preparation and execution of the ECC. In fact, this is what can be seen today. But the strategies could be more ambitious in hopes of allowing the territory to fully capitalise on the current situation. And the ECC did show that an ambitious strategy can be successful. With the closing of the association, what is needed is a new space for discussion and planning that could help coordinate a bright cultural future for the territory.

Analsysis of economic benefits of the EEC

ECONOMIC IMPACT OF MARSEILLE-PROVENCE 2013
EUROPEAN CAPITAL OF CULTURE
CCI MARSEILLE PROVENCE / BOUCHES-DU-RHÔNE TOURISME

CONTEXT

The economic impact assessment for Marseille-Provence 2013, European Capital of Culture was conducted in partnership with the Chamber of Commerce and Industry for Marseille and Provence (CCIMP), the tourism agency Bouches-du-Rhône Tourisme, and the MP2013 association. This study complements the overall impact assessment for Marseille-Provence 2013 that was conducted by the consultancy firm Euréval. The objectives of this economic impact assessment are:

1. To determine what portion of the operational budget for the European Capital of Culture (ECC) was spent within the MP2013 territory.

2. To answer the evaluation questions that are of particular interest to those involved with tourism and the economy in the urban agglomeration of Métropole Marseille Provence:

→ In what ways did the increase in tourism connected to the ECC contribute to the economic development of the territory?

→ What was the amount of money spent by those visitors to the territory connected to the ECC?

In 2013, a vast survey of tourists was conducted in order to:

→ provide insight into tourists' familiarity with the ECC;

→ establish a profile of tourists (ages, cultural habits, professions, accommodation choices, etc.);

→ develop indicators of the satisfaction with the ECC and the overall tourist experience in the Bouches-du-Rhône department.

This survey complements the recurring studies conducted by Bouches-du-Rhône Tourisme on tourist behaviour and by the CCIMP on tourist spending.

SUMMARY

The economic impact of Marseille-Provence 2013, European Capital of Culture was close to 500 million euros. It involves:

→ A direct impact connected to the MP2013 association's cultural spending and the one-time spending by the event's private sector co-producers on EEC projects, which comes to roughly 62 million euros

→ An indirect impact resulting from the extra spending of the eight million traditional visitors along with the two million additional visitors (tourists and excursionists) welcomed to the Bouches-du-Rhône department, which comes to roughly 430 millions euros

These figures reflect the economic benefits that the territory would not have enjoyed if Marseille and Provence hadn't been designated the European Capital of Culture for 2013. In terms of employment, this economic activity resulted in close to 2 800 jobs created or conserved in 2013. The investments that were made in the touristic and cultural infrastructure within the Bouches-du-Rhône, even they are not considered as part of the economic impact of the ECC, still contribute to the '2013 effect', especially in the long term.

Among these investments:

→ 665 M€ for more than 60 construction projects that were emblematic of MP2013. To which must be added the development of the tourist sector in the territory in connection with the event:

→ 130 M€ for renewal or renovation projects with a strong tourist potential,

→ 270 M€ invested by the hotel industry

DIRECT IMPACT

68% of MP2013 spending

62 million € in local spending for the production of cultural events branded MP2013

→ 45 M € in spending by the MP2013 association, not including salaries

→ 7.5 M € in one-time spending by MP2013 co-producers on the principal branded events

→ 68% rate of local spending

→ 9.3 M € in net salaries across the MP2013 territory

TOURISM FIGURES

+ 2 M visitors

1.9 M additional visitors, involving:

→ 912 000 tourist for MP2013

→ 38 000 conserved tourists

→ 950 000 excursionists

The increase in tourism in 2013 involves several factors:

1. An increase in the number of overnight stays in 2013 compared to 2012

2. A decrease in the average length of stay for tourists in 2013 compared to 2012

3. The maintenance of a certain level of tourism in the department in the midst of an economic crisis that saw a decrease in tourism in France and the rest of the PACA region. The Bouches-du-Rhône territory would have suffered this same decline if not for the ECC 2013.

4. The inclusion of so many excursionists as a result of the innovative new Flux Vision programme for tracking tourists (Bouches-du-Rhône Tourisme and Orange TM)

Source: Bouches-du-Rhône Tourisme, CCIMP

IMPACT ON TOURISM

430 Million € in additional revenue

430 M€ / 2800 jobs (FTEs)

The ECC generated 46 M€ in additional spending from the 8 million tourists who would have normally come to the territory.
There was 375 M€ spent by the 2 million additional tourists who came to the territory because of the ECC.
This corresponds to the creation or conservation of 2800 jobs in tourism-related sectors.

Source: Bouches-du-Rhône Tourisme and CCIMP

More than 1 billion euros invested to make region more attractive for tourism

665 M€ / 130 M€ / 228 M€
665 M€ were invested in 40 construction projects that were emblematic of MP2013

There was also a considerable amount of investment in improving the tourist potential of the territory, including:

→ 130 M€ for renewal or renovation projects linked to tourism.

→ 270 M€ invested by the hotel sector.

For 2014 and beyond, 230 M€ have already been committed to cultural infrastructure.
Source : CCIMP

ANALYSIS OF TOURIST PROFILES IN 2013

The follwing results come from a sample selected for two criteria: motive for the visit and geographic origin

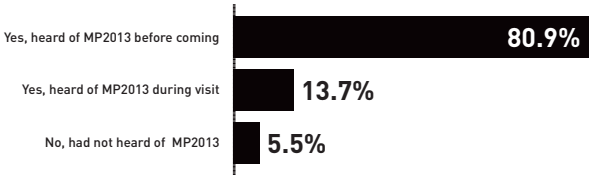
Spontaneous recognition

Before anything else, do you know what is going on this year in the Bouches-du-Rhône territory?

In response to the question of what was going on in the territory, more than 4 tourists in 10, irrespective of their origins (from France or abroad) spontaneously cited Marseille-Provence 2013, European Capital of Culture (with some variants such as, 'A big party like in Lille').

Prompted recognition

Have you heard about Marseille-Provence 2013, European Capital of Culture?



When questioned directly about their knowledge of MP2013:

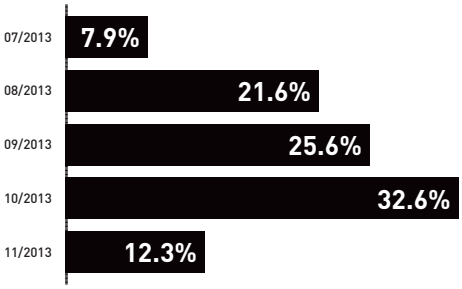
→ More than 80% had heard the event discussed prior to their arrival (88% of French tourists, 55% of foreign tourists).

→ 14% had heard the events discussed during their time in the Bouches-du-Rhône (11% of French and 29% of foreigners).

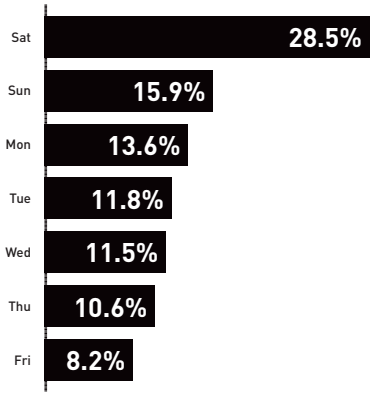
→ In the end, less than 6% had never heard of MP2013 (4% of French and 17% of foreigners).

Survey dates and locations

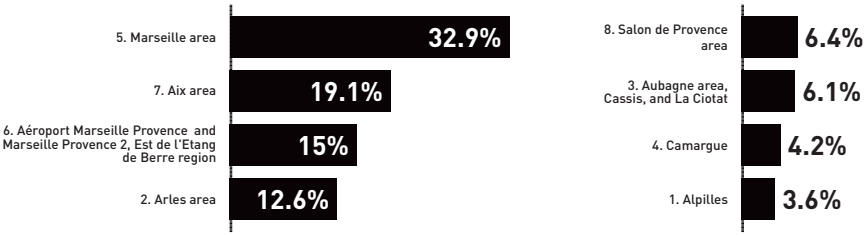
Date of interview (by month)



Date of interview (by day)

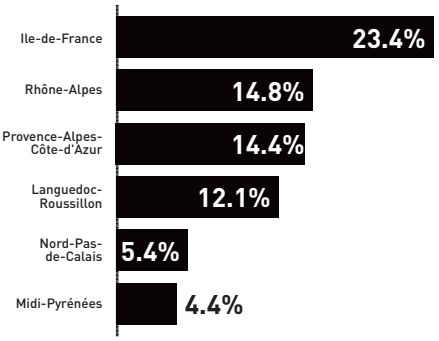


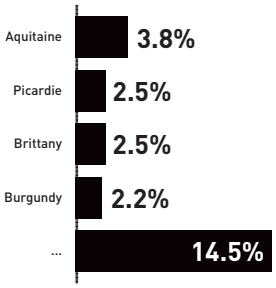
Location of survey



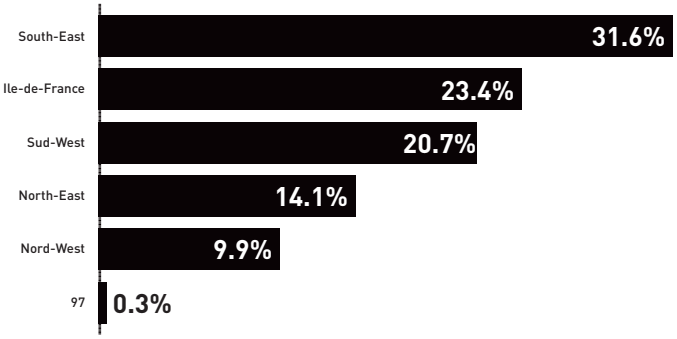
Principle residence of respondents (French)

What is the location of your principle residence? (France)
Response rate : 85.0%



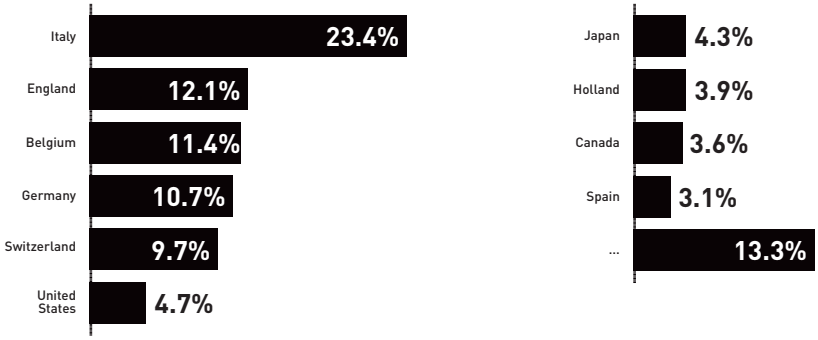


What is the location of your principle residence? (French)

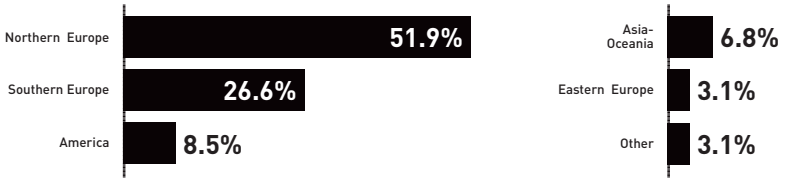


Principle residence of respondent (foreigners)

What is the location of your principle residence? (foreign country)

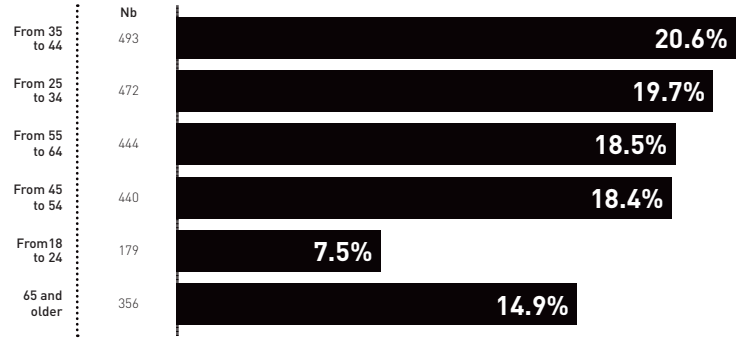


What is the location of your principle residence? (foreign country)

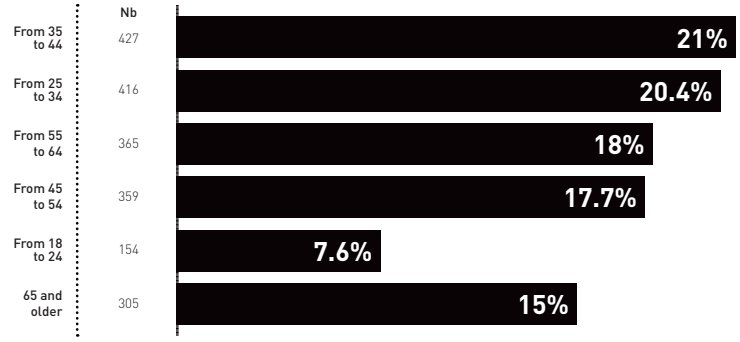


Age of respondents

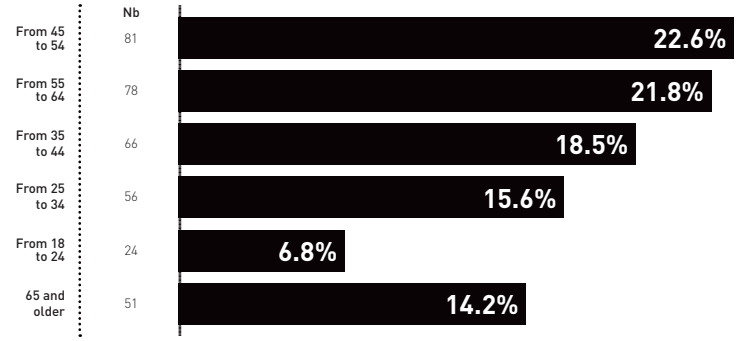
What is your age? (mean = 46.12 / median = 46.00)



What is your age? (French) (mean = 46.12 / median = 45.00)

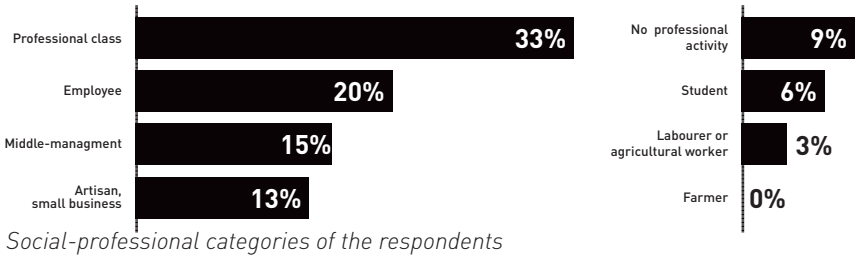


What is your age? (foreigners) (mean = 47.45 / median = 49.00)

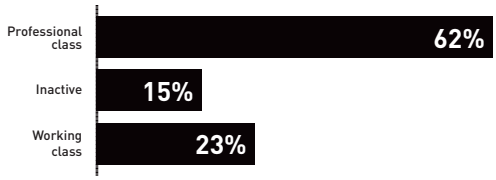


Profession of respondents

Social-professional categories of the respondents



Social-professional categories of the respondents



Length of visit: 5.6 days

In 2013, the length of stay by tourists decreased by 0.6 days.

Length of stay (mean = 5.57)

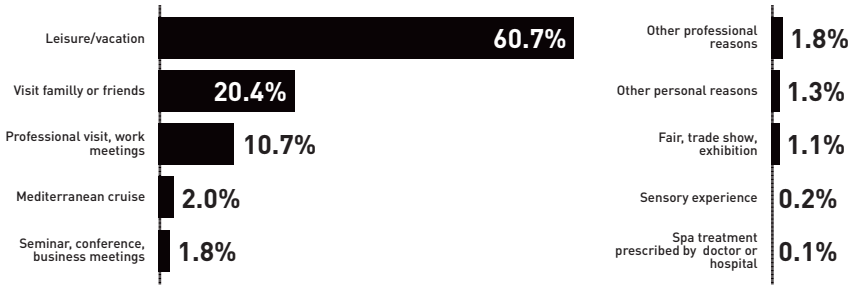
Length of stay [S1 French or foreigner] among "French" (mean = 5.60)

Length of stay [S1 French or foreigner] among "foreigners" (mean = 5.43)

There was no significant difference in response from the various nationalities, which is an important finding. In effect, based on the studies referenced, foreign visitors generally stayed a little longer (6.9 days) than French tourists (6 days).

Motives for visiting

What is the motive of your visit? Source: CCIMP



Most people were visiting for personal reasons for the purpose of:

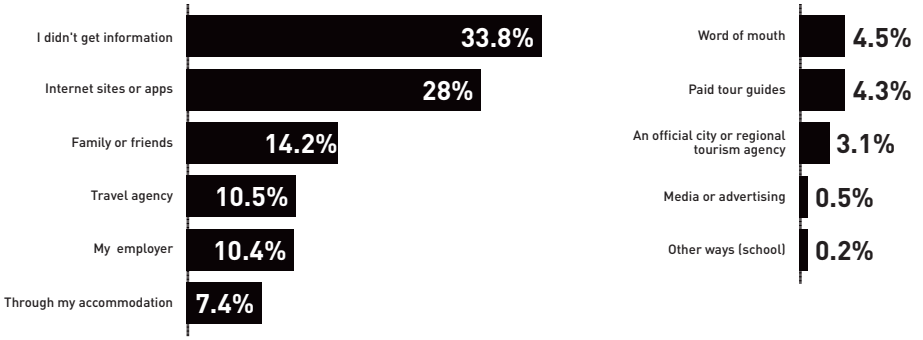
→ "leisure/vacation" for close to 60% of people questioned

→ "followed by "family or friends" for 20% of respondents

→ "professional meetings" were cited as the reason for 10% of visits to the departement.

Pre-visit planning

To prepare for you visit, what materials or sources did you refer to?



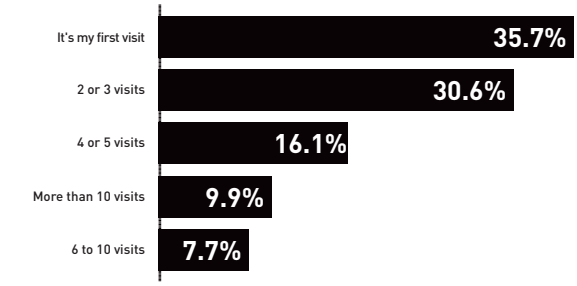
We can see pronounced differences depending on the type of accomodation:

→ In non-commercial accomodation: the absence of prepared information (70%), or information provided by friends or relatives were most frequently cited

→ In commercial accomodation: Internet sites and mobile applications (40%), information provided by the business (15%) or the travel agency (13%) were much more frequently cited.

New visitors

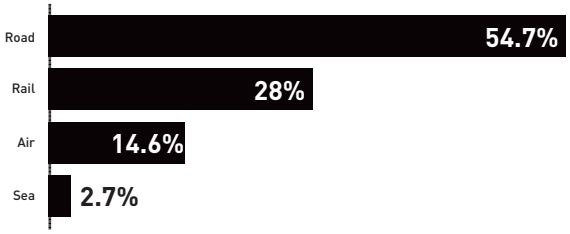
How many times have you visited the Bouches-du-Rhône during the past five years?



According to the study, there was a high number of first-time visitors in 2013. In fact, there was twice the rate of first-time visitors compared to the previous study conducted in 2011. This could be the result of a bias in the survey or part of a trend linked to MP2013, it is impossible to provide a legitimate explanation based solely on the survey data.
However, it can be noted that a high rate of foreign tourists (70%) indicated this was their first visit.
On the contrary, French tourists were most likely to fall into the categories of 4 to 5 visits or 10 and more visits.

Means of transportation

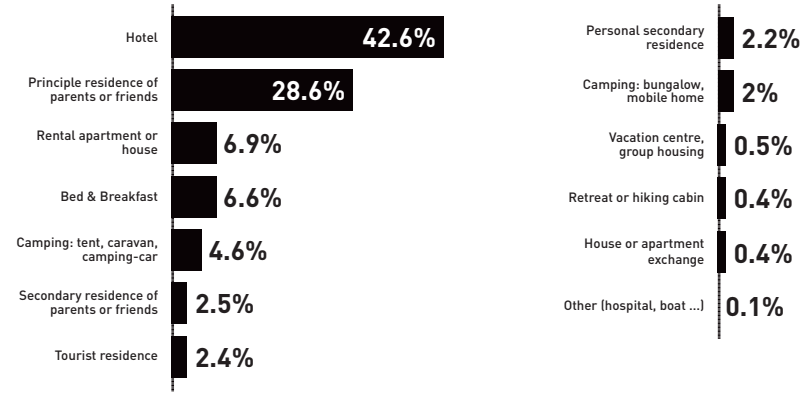
What type of transportation did you use to come to the region?



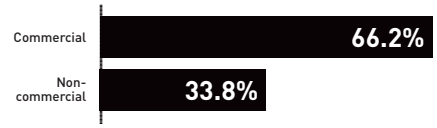
Roadways were by far the main mode of transport used to visit the department, notably for French tourists.
Air travel was the preferred choice for foreign travellers.

Type of accommodation

What type of acccommodation did you use during your stay?

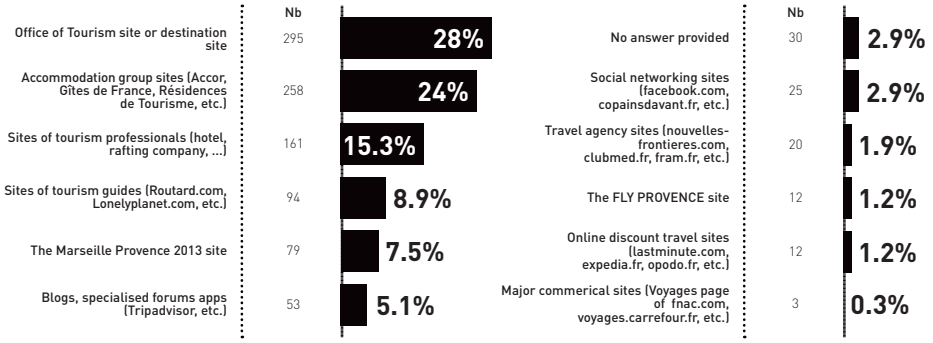


Commercial or non-commercial accommodation



Two thirds of respondents stayed in commercial accommodation, with 42% of tourists staying mostly in hotels. One third of tourists stayed in non-commercial accommodation, which is to say the principal residence of friends or family, a secondary residence (their own or belonging to friends or family), or a residence that was part of a house exchange programme.
Foreign tourists were more likely to stay in commercial accommodation

Q11 - Among the following Internet sites, which did you use to prepare your trip?
Response rate: 24,4%



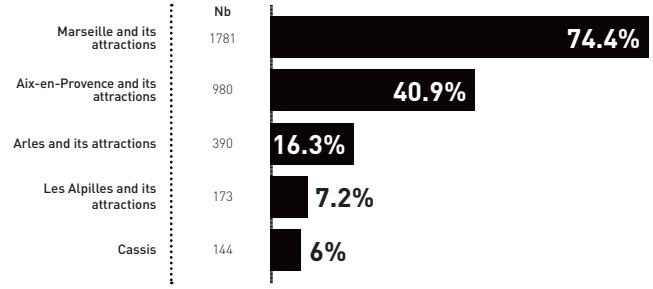
Recommendations

More than 9 out of 10 tourists recommended the Bouches-du-Rhône as a destination to their friends or family. Also, 9 out of 10 hope to return to the area.

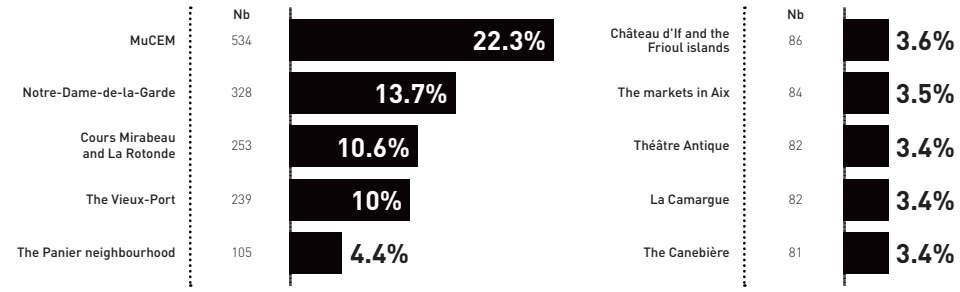
The most visited and recommended attractions

At the top of the list of recommended attractions: the MuCEM.
This was followed by the cities of Aix-en-Provence and Arles, which came in ahead of more specific locations such as the Cours Mirabeau and La Rotonde.
The second most popular site in Marseille, Notre Dame de la Garde, was generally cited before the city itself. In terms of second choices, the list was headed by Notre-Dame-de-la-Garde, followed by MuCEM and the Vieux Port; all of the Marseille locations were cited ahead of La Rotonde and the Cours Mirabeau. In terms of third choice, the list went ND, Cours Mirabeau and La Rotonde, the city of Aix, and the MuCEM.

Q14-1 - What were the 3 main cultural or natural attractions you recommended?



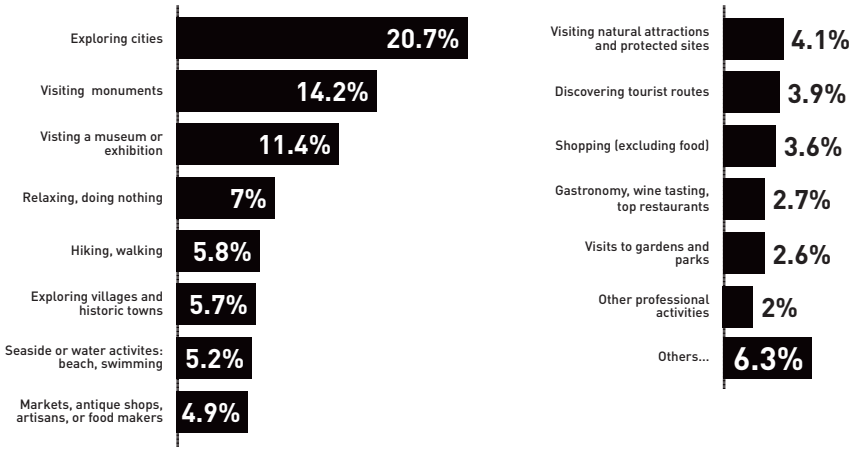
In terms of tourist hubs, tourists preferred the three major cities of the region: Marseille, Aix, and Arles. The small port of Cassis held a distinguished position and was cited as the 5th favorite hub.



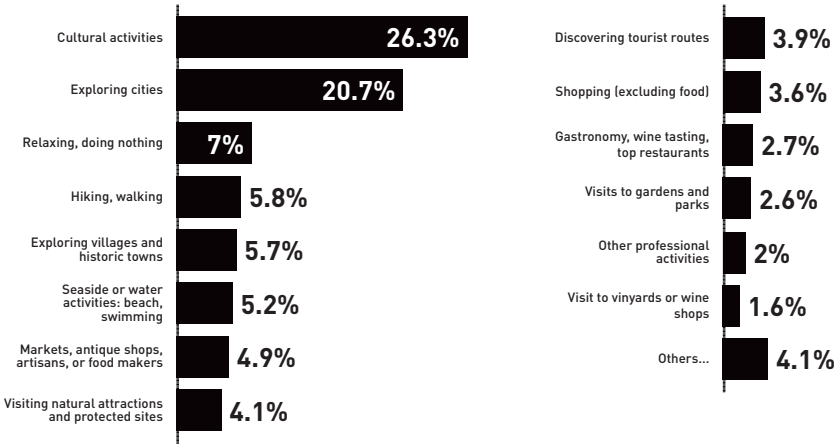
The MuCEM is at the head of the list of attractions visited and recommended.
For the first time, Notre-Dame de la Garde was dislodged from 1st place .
As might be expected, the Top 10 visited attractions included sights in Marseille, Aix, Arles, and the Camargue.

Favourite tourist activities

Q13 - What were the principal activities you participated in? *Reponse rate: 98.0%*

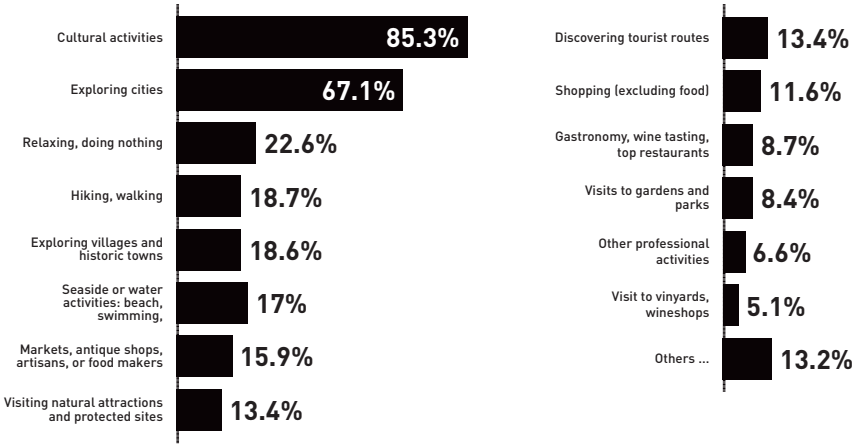


Q13 - What were the principal activities you participated in? *Response rate : 98.0%*



Among the preferred tourist activities, cultural events were cited by more than a quarter of all respondants. City tours were cited by 20% of respondants: this included, as per the criteria of BDR Tourisme for cultural tourists, visiting a monument, visiting a museum, and one cultural event or activity.

Q13 - What were the principal activities you participated in? *Response rate : 98.0%*



In regards to the number of citations, close to 86% of tourists enjoyed a cultural activity and two out of three explored a city.

Satisfaction - Facilities - Summary

In general, there was a very high level of satisfaction regarding accessibility, notably:

→ information for tourists
A good level of satisfaction with :

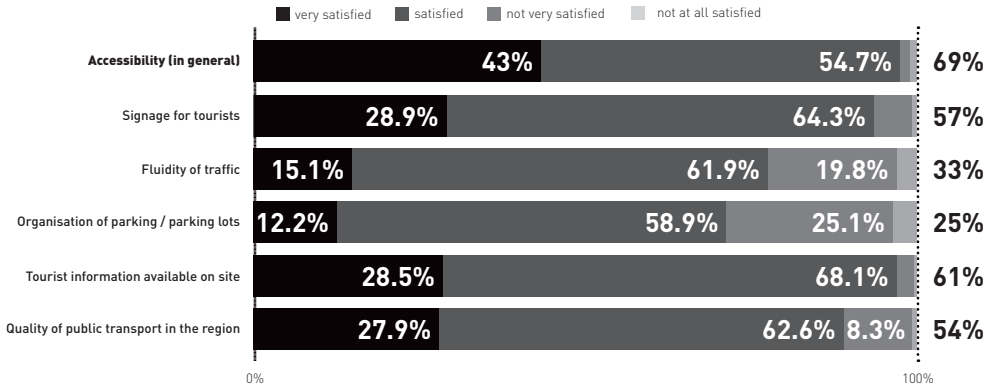
→ signage at tourist sites,

→ the quality of public transportation,

→ the circulation of traffic.
But effort was needed in the following areas:

→ the organisation of parking/general parking received the lowest scores in terms of satisfaction (27% of tourists were not satisfied or had limited satisfaction).

Satisfaction with facilties (on average) *Source: CCIMP*



Calculation of index: (1%: very satisfied, 1/2%: satisfed, 1/2%: not very satisfied, 1%: not at all satisfied).
Interpretation of index : (more than 60 : excellent, between 30 and 60: good, less than 30: poor).

Foreign tourists were more satisfied than French tourists except when it came to the signage (where the average was 54 for foreign visitors).

Satisfaction – Reception - Summary

There was generally an excellent level of satisfaction with the welcome and reception:

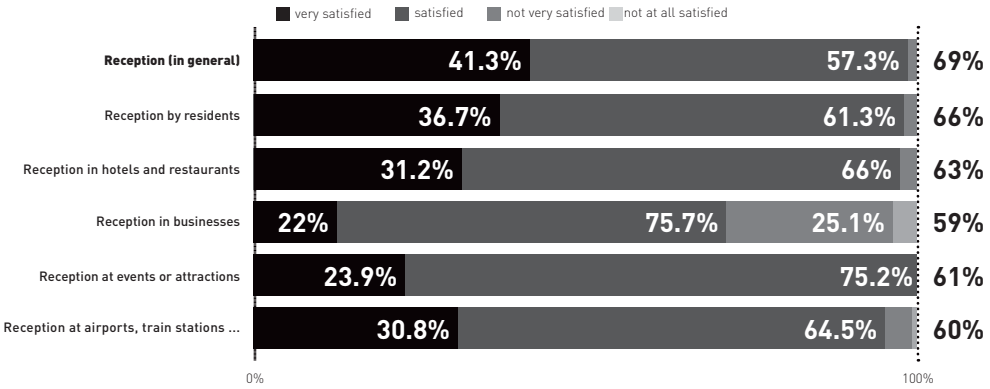
→ from people

→ from restaurants and hotels

→ at sites where events or activities were held

→ where people arrived or departed (train and bus stations, airports...)
However, there tourists were only partially satisfied with their reception in local stores.

Satisfaction with reception (on average) *Source: CCIMP*



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Interpretation of index : (more than 60 : excellent, between 30 and 60: good, less than 30: poor).

Foreign tourists were more satisfied than French tourists.

Satisfaction - Activities - Summary

The activities were generally greeted with a high level of satisfaction. Monuments in particular were met with very high satisfaction. Other sources of high satisfaction:

→ the MP2013 programme

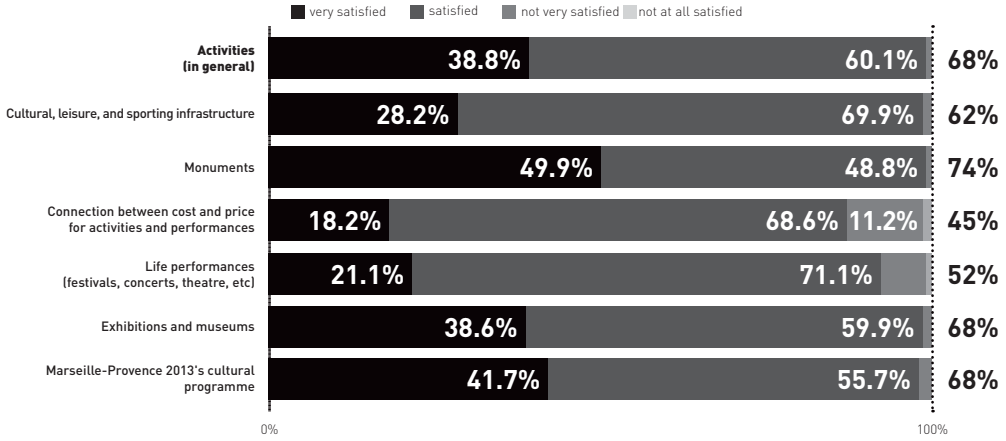
→ the exhibitions and museums

→ the cultural or sporting facilities

Live performances received a medium level of satisfaction, although relatively weak compared to other activities. Efforts need to be made on the following issue:

→ the relationship between the price and the quality (13% of people dissatisfied) was one of the issues that received the lowest satisfaction scores.

Satisfaction with activities (on average) *Source: CCIMP*



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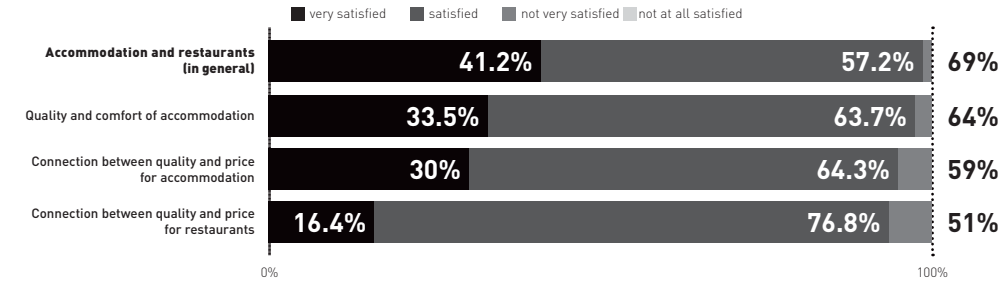
Interpretation of index: (more than 60 : excellent, between 30 and 60: good, less than 30: poor).

Satisfaction-Accomodation and Restaurants-Summary

Accommodations and restaurants received very high satisfaction ratings, both in general and for the quality or comfort of the accommodation. It should be noted that there was slightly less satisfaction with the price/quality relationship in the restaurant sector than in the accommodation sector.

Satisfaction with accommodations and restaurants (on average) *Source: CCIMP*



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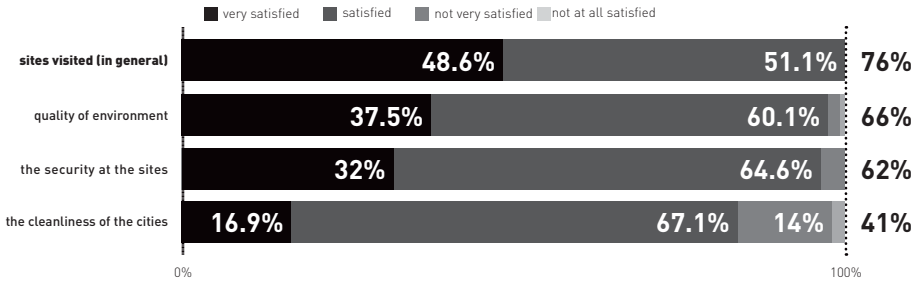
Interpretation of index : (more than 60 : excellent, between 30 and 60: good, less than 30: poor).

Satisfaction - Sites Visited- Summary

There was an excellent level of satisfaction in terms of sites visited. This sector received the highest overall satisfaction scores. Along with the quality, the ambiance and the sense of security were also rated as excellent by respondents.
The only point that needs to be addressed is the cleanliness of sites visited which received the highest rate of dissatisfaction (16%).

Satisfaction with sites visited (on average) *Source: CCIMP*



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Interpretation of index : (more than 60 : excellent, between 30 and 60: good, less than 30: poor).

EEC MP2013 INVESTMENTS

These investments cited in the following section can't be included in the estimate of either the direct or the indirect economic impact of the European Capital of Culture. But they are part of the general "2013 effect" and will have lasting implications, even if these can't be quantified.

The investments made in the years leading up to Marseille Provence 2013 were, for the most part, the result of long-term planning that often was initiated prior to the region receiving the ECC designation. But the ECC did help crystalize these projects and across the region it provided a general goal and a common deadline.

In this way, projects that were originally planned for 2014 or 2015 were rescheduled in order to be ready for 2013 and certain other projects that were on standby were re-launched.

There was also a new level of commitment to investments:

→ Especially in the cultural sector, which was notable in a period when public budgets were under increased scrutiny because of the economy.

→ This was also notable in the private sector where the economic crisis might have led to restrictions on investment in the tourism industry. Three types of investments were identified:

→ Investments in cultural infrastructure that were essential to the event.

→ Investments in the hotel sector.

→ Investments in urban renewal (notably to attract more business tourism).

To go beyond 2013, there are also other investments, in progress or planned, and either linked directly or indirectly to the ECC MP2013.

More than 1 billion euros invested to make region more attractive for tourism

→ 665 M€ were invested in more than 40 construction projects emblematic of MP2013

There was also investment to improve the tourist potential of the territory, including:

→ 130 M€ for renewal or renovation projects linked to tourism.

→ 270 M€ invested by the hotel sector.

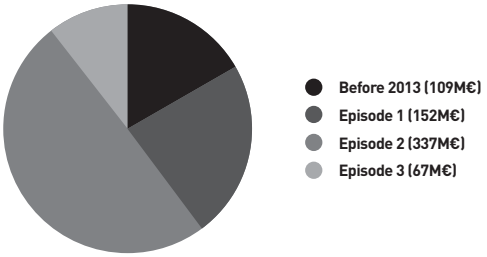
And for after 2014:

→ 288 M€ in investments related to culture or to the 'MP2013' effect

Investments in cultural infrastructures for MP2013

Investments that defined the ECC *Source: CCIMP*

Invested sums categorized by the date of the inauguration



→ 665 million euros invested in more than 40 emblematic sites

→ 50% of the investments were open to the public prior to Episode 2 of MP2013

Details of the major cultural infrastruture of MP2013

Investments

BEFORE 2013

Le Silo / **31.2M€**

Cité des Arts de la rue (excluding renovation of the main hall / **19M€**

Camp des Milles — Memorial site — Aix-en-Provence / **13.8M€**

La Buzine — Maison des Cinématographies de la Méditerranée / **12M€**

Théâtre de l'Odéon — renovation / **5M€**

Mémorial de la Marseillaise / **4.4M€**

Klap — Maison pour la danse — Kéléménis et Cie / **3.8M€**

Théâtre de la Criée (renovation) / **3.6M€**

Opéra de Marseille (façades, external woodwork) / **3.5M€**

Cultural and Leisure Areas of Longchamp (restoration of 9 buildings and the cages) / **2.6M€**

Abbaye Saint-Victor (crypt and façades) / **2.5M€**

Palais Carli (roof, court of honour...) / **2.5M€**

Théâtre Toursky — creation of a musical cafe / **2.4M€**

Le Moulin — New music — renewal / **1.8M€**

Reopening of archaeological garden on rue Barbusse / **0.7M€**

Espace Julien (renewal) / **0.4M€**

Alhambra (renovation of cinema space) / **0.2M€**

Salle Musicatreize (transformation of rehearsal space) / **0.1M€**

sub-total: 109.5M€

EPISODE 1

Villa Méditerranée / **82M€**

Friche Belle de Mai — Panorama — Cabaret Aléatoire and Magasins / **23.2M€**

FRAC — exhibition *La fabrique des possibles* / **22M€**

J1 / **9M€**

Musée Regards de Provence — sanitary facilities / **4.2M€**

Palais du Pharo : façades and exterior lighting / **3.6M€**

Pavillon M / **3.5M€**

Musée Cantini (renovation) — exhibition Mata / **2.7M€**

Hôpital Caroline (renovation of the 'capitainerie' and the 'chevalier Roze') / **1.5M€**

Le Rio — contemporary instrument centre — Télémaque / **0.8M€**

sub-total: 152.5M€

EPISODE 2

MuCEM: Fort Saint Jean / J4 / Centre Conservation et Ressources / Jardins des migrations / **225.1M€**

Musée d'Histoire et du Port Antique de Marseille (collections, multimédia, restoration) / **36.3M€**

Cultural and Leisure Areas of Borély / **29.5M€**

Cultural and Leisure Areas of Longchamp (Musée des Beaux Arts, façades, Verrière...) / **28.8M€**

Fondation Vasarely / **10M€**

Chapelle des Pénitents Blancs (Musée Granet Aix-en-Provence) / **6.2M€**

L'Affranchi (extension, musical café) / **1M€**

sub-total: 336.9M€

EPISODE 3

Conservatoire de Musique – Aix-en-Provence / **22.7M€**

The new théâtre de la Minoterie / **13.9M€**

Musée Départemental Arles Antique (extension et restoration / **10M€**

Transformation of welcome centre at Notre-Dame de la Garde / **5.4M€**

Eden Théâtre — La Ciotat / **5M€**

Friche Belle de Mai: theatres / **4.6M€**

Cité des Arts de la Rue: renewal of main hall / **1.8M€**

Hôpital Caroline — 'Palais de l'intendant '/ **1.5M€**

sub-total: 64.9M€

AFTER

200 million euros in investments underway or planned for between 2014-2020

Fondation Luma — Parc des Ateliers — Arles / **100M€**

Muséon Arlatan — Arles / **30M€**

Site Pablo Picasso – Conservatoire de musique et de danse — Martigues / **10M€**

École supérieure de la Photographie — Arles / **20M€**

Puits Morandat (Art & Science centre) — Gardanne / **10.5M€**

Institut méditerranéen des Métiers du Spectacle / **6.5M€**

Fondation Vincent Van Gogh — Arles / **6M€**

Musée Estrine — transformation and enlargement– Saint-Rémy-de-Provence / **2.2M€**

sub-total: 185.2M€

TOTAL : 849M€

Urban renewal projects with tourism implications

Major investments in urban renewal or infrastructure for business tourism were made in the years leading up to MP2013.

130 M€ for renewal projects with major tourism implications

Principal operations / Investment

Vieux-Port and city boulevards / **45M€**
Euroméditerranée investment / **39M€**
Esplanade of La Major / **11M€**
Palais du Pharo: extension of the conference centre (business tourism) / **12.1M€**
Parc Chanot - Renovation (business tourism / **24M€**
Place de Lenche / **1.5M€**
Square Narvik (phase 1) / **4.3M€**

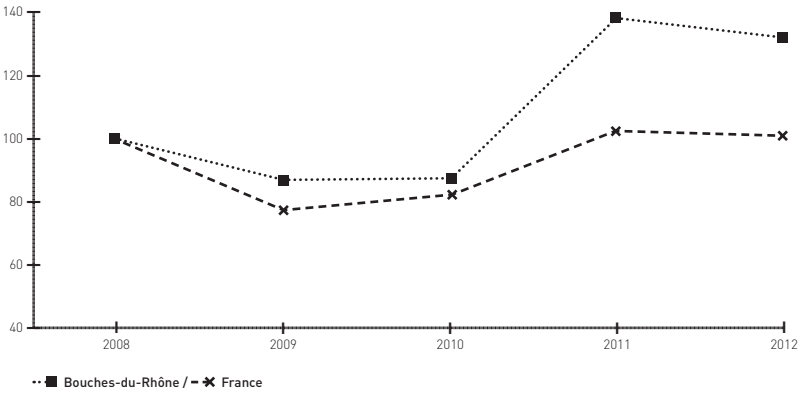
For 2014 / Investment

Operation 'Voute de la Major' (not included in total) / **29M€**

Heavy investments in the hotel sector since 2008

274 million euros invested between 2009 and 2010 for building and renovations.

Growth in hotel sector investments (base of 100 in 2008)
Source: Barometer of tourism investments PACA - CCIMP



Local context: there was much needed investment in new hotel space (a question of bringing facilities up to par).
It is likely that the ECC MP2013 wasn't the direct cause of this investment in the hotel sector (the desire to upgrade the rating of hotels is a more suitable explanation for the investments in renovations). Nonetheless, the investments in cultural infrastructure and urban renewal had an effect on the appeal of the region for tourists which certainly made these hotel investments more viable.

METHODOLOGICAL ANNEXES

Direct impact: 68% of MP2013 expenditures

Analysis of spending by the association

	Departement	Total	Part
Total 2010 / 2014	**44 721 122 €**	**66 004 645 €**	**68%**
2010	33 733 €	58 748 €	57%
2011	3 431 405 €	4 880 301 €	70%
2012	13 223 980 €	19 384 631 €	68%
2013	26 943 084 €	40 095 744 €	67%
2014	1 085 320€	1 585 221 €	68%

45 M€ in spending in the Bouches-du-Rhône department by the MP2013 association, excluding salaries.
Rate of local spending: 68%
+ 9.3 M€ in net salaries in the MP2013 territory
Source: MP2013

Analysis of expenditures by principal co-producers
Source: MP2013
order better to account for cultural spending related to MP2013, the exceptional expenditures by the project's cultural and private partners must also be considered.
The analysis involves the 25 largest operators (in terms of expenditures related to MP2013 events). These operators generated more than 11 M€ in expenditures that are not included in the budget of the MP2013 association. The rate 68% local spending is then applied to these exceptional expenditures on the part of the co-producers. Thus, 7.5M € can be added to the direct spending total in the MP2013 territory.

Tourism figures

Increase in overnight stays

Year	Overnight Stays
2012	41 344 344
2013	42 757 146
Increase	**1 412 802**

Decrease in the average length of stay

Periods	Overnight stays	Average length of stay	Change in length of stay
May to October 2012	30 657 355	6.2	-0.6
May to October 2013	32 383 934	5.6	
Rest of year 2012	**10 686 988**	**4.9**	**-0.3**
Rest of year 2013	**10 373 212**	**4.6**	

Source: B.E.T François Marchand for CRT PACA 2010-2011, Bouches-du-Rhône Tourisme, CCIMP.
The number of tourists is calculated as a function of the number of overnight stays and the average length of stay.
The major finding: the number of overnight stays increased by 3.4% between 2012 and 2013. The average length of stay is based on studies conducted by the Comité Régional du Tourisme PACA. A similar study was conducted by the CCIMP in 2013.
This revealed a decrease of 0.6 days in the average length of stay between May and October and led to the hypothesis that there was a 0.3 decrease the rest of the year.

Tourism figures: 910 000 tourists

Increase in overnight stays + Decrease in the length of stay = Increase in number of tourists

Periods	Overnight stays	Average length of stay	Number of tourists
Change: May-October	1726579.65	-0.60	838111
Change: Rest of year	-313776.23	-0.30	740428
Change: 2012/2013	1412803.41		912139

Source: B.E.T François Marchand for CRT PACA 2010-2011, Bouches-du-Rhône Tourisme, CCIMP.

The decrease in the length of stay implies that there was a proportionally higher increase in actual number of tourists than in the number of overnight stays.
At the same time, even if the number of overnight stays slightly decreased during the off-season, the decrease in length of stay means there was still a slight increase in the number of tourists.
Thus, the territory welcomed more than 910 000 additional tourists in 2013.

Tourism figures: 38 000 conserved tourists

	BdR, Var, Vaucluse, Alpes-Maritimes	Var, Vaucluse, Alpes-Maritimes	BdR observed	BdR if followed trend
Year	Number of overnight stays	Number of overnight stays	Number of overnight stays	Number of overnight stays
2012	183291947	141947604	41344343	
2013	184002000	141245000	42757000	41139699
Change: 2012/2013	710053	-702604	1412657	-204644
Change: 2012/2013 (%)	0.39%	-0,49%	3,42%	-0,49%

Source: B.E.T François Marchand for CRT PACA 2010-2011, Bouches-du-Rhône Tourisme, CCIMP.

If the Bouches-du-Rhône territory had followed the same trends that were seen in other departments of PACA (Var, Vaucluse, Alpes-Maritimes) between 2012 and 2013, the department would have lost more than 210 000 overnight stays (-0.5%). This is the equivalent of a loss of 38 000 tourists.
Thus, the territory conserved 38 000 tourists.

Tourism figures: 950 000 excursionists

Flux Vision for Tourism allowed the movements of people in the territory to be measured for the first time, whether they be residents, tourists, or excursionists.
According to the FVT measure, 1 tourist is the same as 1.5 excursionists.
Of course, excursionists included residents of neighbouring departments who might be counted while commuting for leisure activites, shopping, or work, activities that should not be counted as tourism spending. Thus, the measure of 1 tourist = 1 excursionist is being used.
Thus, the territory welcomed 950 000 excursionists in 2013.
Source: OrangeTM (Flux Vision for Tourism)/Bouches-du-Rhône Tourisme.

Objectives of the survey of tourists

The goal of this survey was to determine the level of tourist spending and the manner in which the money was spent, as well as the length of the average tourist stay.
A tourist is defined as any person with a permanent residence outside the defined territory who spends at least one night in the territory.
The final goal was to determine what impact the ECC MP2013 had on the length of tourist stays, the amount of tourist spending, and also the manner in which tourists spent their money.

These findings were essential to the estimate of the indirect economic impact of MP2013. They also resulted in:

→ an understanding of the general awareness of the event,

→ an understanding of tourist profiles (ages, cultural habits, social and professional status, accommodation types, etc.)

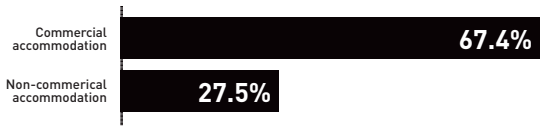
→ an understanding of the levels of satisfaction of tourists with MP2013 and the reception they received in the Bouches-du-Rhône.

Methodology

Survey of 2 393 tourists in the Bouches-du-Rhône department between 25 July and 8 November.
1394 questionnaires were administered face to face.
999 were filled in by respondents independently.
The raw sample, based on the number of respondents, consisted of:

French or foreigner

Commercial or non-commercial accommodation

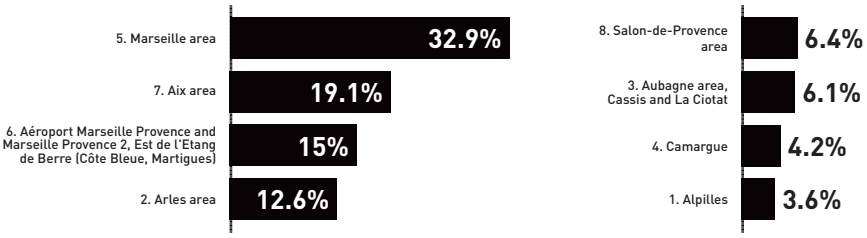


What was the principal reason for your visit to the Bouches-du-Rhône?

Untreated, the sample is not very representative of the overall tourist profile in the Bouches-du-Rhône as it was revealed in the survey of BdR tourists conducted in 2011 which serves as the reference point for this survey.
Notably, the levels of commercial accommodation and professional visitors are both under-represented, and these groups tend to have a higher level of spending than average. On the other hand, foreign tourists are over-represented in the raw sample. This results in an artificially high level of spending.

However, the raw sample is relatively representative in terms of locations visited because the surveyors were given quotas for each area in order to better represent the entire MP2013 territory.

Location of survey



Still, a minor deviation can be observed in two areas: Les Alpilles are under-represented and Arles is over-represent.
Nonetheless, these minor deviations don't have any significant impact on the average tourist spending.

Transformation of the data sample

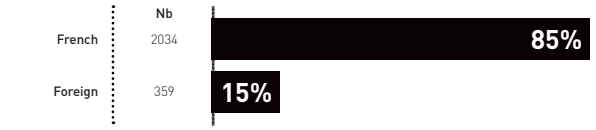
The data was then treated along two criteria so that it conformed to the observations made in 2011, which are important in terms of the tourist expenditures:

→ the reason for visiting the territory (personal or professional)

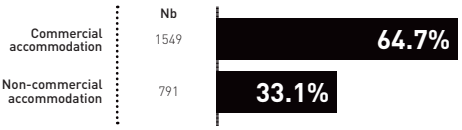
→ geographical origin (French or foreigner)

Q2 - What was the principal reason for your visit to the Bouches-du-Rhône ? *(Response rate: 100.0%)*

S1 - French or foreign *(Response rate: 100.0%)*



Commercial or non-commercial accommodation *(Response rate: 97%)*



All the same, this method has the tendancy to over-estimate the proportion of tourists staying in commercial accommodation: hotels, camp sites, etc. which may be one reason for the elevated levels of tourist expenditures.

The basis for calculations

The estimate of the indirect economic impact is based on calculations derived from the survey of tourists conducted by CRT PACA/Bouches-du-Rhône Tourisme in 2011.

This data reveals:

→ that for tourist visits and expenditures between May and October:
- the average length of stay = 6.2 days
- the average expenditure = 58 €

As the survey was conducted between July and the beginning of November 2013, the data was compared to results from the same period of the BdR survey.

The results were then extrapolated for the entire year of 2013.

→ in terms of the number of tourists:
- in 2012, the Bouches-du-Rhône department welcomed close to 7.8 million tourists.
- these tourists accounted for roughly 41.3 million overnight stays.

Expenditures and average length of stay for tourists in 2013

66 € / 5.6 days

→ the average amount spent per day is 66 € (or an increase of 8 € a day)

→ the average length of stay is 5.6 days (or a decrease of 0.6 days)
Thus, the average expenditure per visit (66*5.6=366) is 7 € higher per tourist (366 €-359 €).
Source: CCIMP survey conducted among 2 393 tourists from the Bouches-du-Rhône department between 25 July and 8 November. 1394 questionnaires were administered face-to-face. 999 were filled out independently by respondents.

Average expenditure: 66 €

The average expenditure is 66 € per day by tourists.
The average expenditure is 26 € per day by excursionists

In €	Tourist expenditures	Rate of excursionist expenditures	Excursionist expenditures
Accommodation	26	0%	-
Food (restaurants, food spending)	20	50%	10
Leisure / culture	7	100%	7
Purchase of goods (clothes, souvenirs...)	6	100%	6
Transport in the region	8	50%	4
Total expenditures	**66**		**26**
Length of stay (May-October)	5.6		1
Length of stay (rest of year)	5.3		1

Source: Bouches-du-Rhône Tourisme; CCIMP survey

The calculation of the indirect economic impact

Type of tourist	Additional spending
Regular tourists	**7€ more per day**
Extra tourists: (May - Oct)	66€ x 5.6 jours = 397€
Extra tourists: (rest of year)	66€ x 5.3 jours = 350€
Additional tourists	
Conserved tourists	66€ x 5.6 jours = 397€
Excursionists	26€ x 1 jour = 26€

Sources: Bouches-du-Rhône Tourisme, CCIMP

Type of tourist	Number	Additional spending in €	Indirect economic impact in €
Regular tourists	**7 800 820**	**7**	**54 605 737**
Additional tourists	**912 139**	**367**	**334 462 890**
of whom came May to October	838 111	368	308 660 280
of whom came the rest of the year	74 028	349	25 802 610
Conserved tourists	**38 612**	**368**	**14 220 171**
Excursionists	**950 751**	**26**	**25 076 813**
Total	**1 901 502**		**428 365 611**

Sources: Bouches-du-Rhône Tourisme, CCIMP.
Note: 100% of additional tourists are included in the calculation of the indirect impact.

Weighing the impact

Marseille-Provence 2013 also resulted in public expenditures or dispersements that could offset the overall indirect economic impact:

→ The cost of displacements, that is to say visitors who chose not to come to the territory because of the preponderance of tourists. This group may have decided not to come due to overcrowding or difficulties in finding accommodation.

→ Expenses for public transportation (the minibus around the Vieux Port, for example).

→ Higher security costs as a result of the major public events.
All of these factors must be considered when weighing the benefits of the overall indirect economic impact.

Estimate of jobs created due to indirect economic impact

In €	Revenue per job	Number of jobs
Acommodation	170 209	980
Food (restaurants, food purchases)	121 060	1 075
Leisure / culture	207 294	212
Purchase of goods (clothes, souvenirs...)	287 191	132
Transport within region	126 712	389
Total	**153 577**	**2 789**

Sources: ESANE,CCIMP.
Based on the expenditures, an estimate was made for the number of jobs that were potentially created. It involves the number of full time equivalencies (FTEs). This increase in economic activity might also have led to more hours being worked by employees already in place (the tourism sector is notable for having a large number of part-time workers). In order to determine the volume of employment created as a result of the increased tourism, a technical ratio (revenue including taxes per employee) was used based on the findings of the study business statistics study ESANE 2011.

Annexes

OVERVIEW OF EVENT ATTENDANCE FOR THE ENTIRE YEAR

(number of visits, free or paid; the same visitor can make several visits)

Major events: 1 711 000

→ Opening weekend / 12 and 13 January: 511 000

→ *Folle Histoire-Entre flammes et flots* / 3 and 4 May: 484 000

→ *TransHumance* / 18 May to 9 June: 330 000

→ *Révélations 1 to 8* (Groupe F): 266 000

→ *Métamorphoses* (including Champ Harmonique): 120 000

Exhibitions: 5 784 000

→ MuCEM / 7 June-31 December: 1 824 000
of which exhibitions: 600 000

→ *Le Grand Atelier du Midi* / 13 June-13 October (Aix and Marseille): 462 000 of which the Palais Longchamp: 220 000 and Musée Granet: 242 000
Picasso céramiste (Aubagne) / 27 April-13 October: 53 000
Dufy, de Martigues à l'Estaque / 13 June-13 October (Martigues): 20 000

→ Musée département de l'Arles antique :
Rodin / 6 April-1 September: 139 000
Chaland antique / 5 October-31 December: 47 000

→ J1 / 12 January-18 May: 217 000
of which the *Méditerranées* exhibition: 115 000

→ J1 /11 October-22 December: 90 000
of which the *Le Corbusier* exhibition: 70 000

→ Villa Méditerranée / 15 March-31 December: 256 000

→ Regards de Provence / 1 March-31 December: 90 000

→ Digue du large – *Les terrasses* - Kader Attia /
25 May-29 September: 40 000

→ FRAC / 23 March-31 December: 40 000

→ *Sur les pas d'Ulysses* FRAC (across the territory): 223 000

→ Friche Belle de Mai (visits to exhibitions) : 120 000

→ Contemporary Art Route (Aix) /
12 January -17 February: 70 000

→ *Les Bouches du Rhône d'Agnès Varda* (Aix) /
12 January-17 March: 31 000

→ *Cadavre Exquis* - Musée Granet (Aix) /
13 January-13 April: 42 000

→ Musée Cantini (Marseille) *Matta - César à Marseille - Chefs d'œuvre d'art moderne*: 100 000

→ *Vestiges* by Joseph Koudelka -Vieille Charité /
13 January-13 April: 43 000

→ *Le Trésor des Marseillais* - Vieille Charité /
13 January-13 April: 43 000

→ Château Borély (Musée des arts décoratifs, faïence et mode) / 15 June-31 December: 50 000

→ *Le Pont* - Musée d'Art contemporain (Marseille) /
25 May-20 October: 22 000 (not including city exhibit)

→ Centre Pompidou mobile (Aubagne) /
29 June-29 September: 40 000

→ Felice Varini (Salon) / 24 May-31 December: 66 000

→ Rencontres de la photographie d'Arles / 1 July-22 September: 72 000 visits for the 2 co-produced exhibitions co-produites (Sergio Larrain, Alfredo Jaar)

→ *Mon île de Montmajour* - Christian Lacroix /
5 May-3 November: 65 000

→ *Nuage* - Musée Reattu (Arles) / 15 May-31 October: 42 000

→ Guiseppe Penone - Chapelle du Méjan (Arles) /
1 July-22 September: 20 000

→ Lee Ufan - Chapelle Saint Laurent (Arles) /
1 July-22 September: 12 000

→ Musée d'histoire de Marseille /
13 September-31 December: 80 000

→ *Lumières* - Muséum d'histoire naturelle /
29 June-31 December: 40 000

→ *Secrets et Parcours* - Palais de la Bourse : 80 000
of which the *Grande Parade*: 20 000

→ Argilla (Aubagne) / 17 and 18 August: 100 000

→ *Désordre* by Bernar Venet – Palais du Pharo: 50 000

→ Camp des Milles: 70 000
of which the ***Créer pour résister*** exhibitions: 7 000

→ Rencontre du 9e art (Aix) / March to May: 60 000

→ *Paper Art Project* - Cité du Livre (Aix) /
19 January-17 December: 65 000

→ Léo Marchutz - Atelier Cézanne (Aix) /
1 July -15 September: 21 000

→ *Monet, Renoir…Voyages en Méditerranée* (Les Baux) /
8 March-5 January: 373 000

Other events: 2 352 000

→ *Cirque en capitales* (two seasons): 104 000

→ *Août en Danse* / 24-31 August: 17 000

→ *La Folle Histoire des arts de la rue* (not including *Flammes et Flots*) / 3-20 May: 64 000

→ *La Nuit Industrielle* (Martigues) / 31 August: 14 000

→ *Yes We Camp* / May to September: 49 000 including 15 000 overnight stays

→ *Festins de Méditerranée* (Aubagne, Arles, Istres, Salon, Gardanne, Saint-Rémy): 20 000

→ *Grande Parade Maritime* - Septembre en mer: 32 000

→ Friche Belle de Mai (*Cuisine en Friche* / *This is not music*, etc): 250 000

→ Friche Belle de Mai (other visitors): 130 000

→ *Métamorphoses* / 20 September-6 October: 80 000

→ *Écrans voyageurs* (15 stops): 7 000

→ Summer festivals (commerical or co-produced performances): 285 000

→ *Babel Med* / 21-23 March: 16 000

→ *Les Suds à Arles* / 8-14 July: 64 000

→ *Festival de Marseille* / 19 June-12 July: 25 000

→ *Jazz des cinq continents* / 17-27 July: 34 000

→ *Marsatac* / 19-29 September: 30 000

→ *Actoral* / 24 September-12 October: 12 000

→ *Fiesta des Suds* (Marseille) / 18-26 October: 50 000

→ *E-Topie* - Chroniques des mondes possibles - Seconde Nature (Aix): 37 000

→ Other festivals: 174 000

→ Other performances, literary events, movies, equestrian shows…: 738 000

→ GR®2013: 120 000

→ Pavillon M: 1 210 000

Total estimate: 11 057 000

EMBLEMATIC CULTURAL CONSTRUCTION

(investment)

Prior to 2013

→ Le Silo: 31.2M€
→ Cité des Arts de la rue (not including renovation of grand hall): 19M€
→ Camp des Milles — Site mémorial (Aix-en-Provence): 13.8M€
→ La Buzine - Maison des Cinématographies de la Méditerranée: 12M€
→ Théâtre de l'Odéon (renovation): 5M€
→ Mémorial de la Marseillaise: 4.4M€
→ Klap - Maison pour la danse - Kéléménis et Cie: 3.8M€
→ Théâtre de la Criée (rénovation): 3.6M€
→ Opéra de Marseille (façades, external improvenments): 3.5M€
→ Pôle Culture et Loisir de Longchamp (restoration of 9 outbuilding and the cages): 2.6M€
→ Abbaye Saint-Victor (crypt and façade): 2.5M€
→ Palais Carli (roof, interior courtyard ...): 2.5M€
→ Théâtre Toursky (creation of a performance café): 2.4M€
→ Le Moulin - Musiques actuelles (general improvements): 1.8M€
→ Reopening of the archaeological gardens on rue Barbusse: 0.7M€
→ Espace Julien (general improvements): 0.4M€
→ Alhambra (renovation of the cinema space): 0.2M€
→ Salle Musicatreize (reorganisation of the practice hall and concert hall): 0.1M€

sub-total: 109.5M€

Episode 1

→ Villa Méditerranée: 82M€
→ Friche Belle de Mai - Panorama - Cabaret Aléatoire and stores: 23.2M€
→ FRAC - Exhibition *La fabrique des possibles*: 22M€
→ J1: 9M€
→ Musée Regards de Provence - washroom facilities: 4.2M€
→ Palais du Pharo (Façades and lighting): 3.6M€
→ Pavillon M: 3.5M€
→ Musée Cantini (renovations) - exposition *Mata*: 2.7M€
→ Hôpital Caroline (renovations "capitainerie" and "chevalier Roze"): 1.5M€
→ Le Rio - contemporary music centre - Télémaque: 0.8M€

sub-total: 152.5M€

Episode 2

→ MuCEM: Fort Saint Jean - J4 - Centre Conservation et Ressources - Jardins des migrations: 225.1M€
→ Musée d'Histoire et du Port Antique de Marseille (collections, multimedia, renovation): 36.3M€
→ Pôle Culture et Loisirs de Borély: 29.5M€
→ Pôle Culture et Loisirs de Longchamp (Musée des Beaux-Arts, façades, Verrière...): 28.8M€
→ Fondation Vasarely: 10M€
→ Chapelle des Pénitents Blancs (Musée Granet, Aix-en-Provence): 6.2M€
→ L'Affranchi (extension): 1M€

sub-total: 336.9M€

Episode 3

→ Music conservatory (Aix-en-Provence): 22,7M€
→ The new théâtre de la Minoterie: 13.9M€
→ Musée Départemental Arles Antique (extension and restoration of barge): 10M€
→ Reorganisation of welcome facilities at Notre-Dame de la Garde: 5.4M€
→ Eden Théâtre (La Ciotat): 5M€
→ Friche Belle de Mai - Pôle Théâtre: 4.6M€
→ Cité des Arts de la Rue (organisation of grand hall): 1.8M€
→ Hôpital Caroline - Palais de l'intendant: 1.5M€

sous-total: 64.9M€

After

200 million euros in investments in progress or planned for the period 2014-2020

→ Fondation Luma - Parc des Ateliers (Arles): 100M€
→ Muséon Arlatan (Arles): 30M€
→ Site Pablo Picasso – Conservatoire de musique et de danse (conservatory for music and dance): 10M€
→ École supérieure de la Photographie (Arles): 20M€
→ Puits Morandat - Centre culturel Art & Science (Gardanne): 10.5M€
→ Institut méditerranéen des Métiers du Spectacle: 6.5M€
→ Fondation Vincent Van Gogh (Arles): 6M€
→ Musée Estrine - transformation and expansion (Saint-Rémy-de-Provence): 2.2M€

sub-total: 185.2M€

Total: 849M€

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Marseille-Provence 2013 also thanks the Club Entreprises 2013.