



MEMORANDUM

To: Cara Rousseau, Discover Durham
Génesis Defilippi, Discover Durham

From: Eric Oberstein, Eric Oberstein Productions
Priya Sircar, Road Openers, LLC
Jon Stover, Jon Stover & Associates

Date: October 27, 2025

RE: **Executive Summary: Durham Festival Study — Phase 1 Findings & Recommendations**

This memorandum summarizes the final presentation of Phase 1 of the Durham Festival Study, presented to Discover Durham and the Festival Study Committee on October 17, 2025.

Purpose & Process

Phase 1 of the Durham Festival Study assessed Durham's current festival ecosystem and outlined a roadmap toward a comprehensive Festival Plan (Phase 2). Led by Eric Oberstein Productions and Road Openers, LLC, with Jon Stover & Associates, the study (July-October 2025) engaged Durham stakeholders, complemented by research on nine competitive and inspirational U.S. markets (Austin, Charleston, Fort Worth/Arlington, Providence, Raleigh, Richmond, Savannah, Seattle, and Washington, D.C., with deeper dives into Austin, Charleston, Providence, and Richmond) and a gap analysis comparing Durham's infrastructure and funding to peer communities. In total, the research team conducted 13 interviews, three workshops, and a festivalgoer survey in collaboration with Discover Durham.

Key Findings

- **Strengths of Durham's Festival Landscape:** Entrepreneurial spirit, diversity of types of festivals, and a cohort of capable and committed producers; Durham's existing festivals are assets; strong alignment between festivals and Durham's creative identity.
- **Vibrant but Under-Resourced Ecosystem:** Durham hosts many homegrown, grassroots festivals with strong community pride and participation but limited funding, infrastructure, and coordination across the festival community.



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- **Demand for Funding Far Exceeds Support:** City festival funding doubled last year to \$400K, yet requests surpass available funds by 4x; reimbursement-based grants strain small producers.
- **Systemic Challenges Hamper Flourishing:** Fragmented processes, inequitable funding distribution, over-utilized venues/public spaces, and limited corporate sponsorship infrastructure.
- **Yet, Opportunities Abound:** Coordinated municipal leadership, clearer permitting (“one-stop shop”), diversified funding sources (public, private, hotel occupancy tax (HOT) revenues) and distribution mechanisms (tailored for different objectives/purposes), mentorship/incubation to professionalize producers, and consideration of strategy toward increased economic impact and community participation.

Competitive Insights

Peer cities demonstrate best practices relevant to Durham:

- Centralized coordination through a cultural office or Destination Marketing Organization (e.g., Providence’s Dept. of Art, Culture + Tourism; Richmond’s Venture Richmond), in collaboration with other offices and organizations.
- Sustained municipal funding for festivals, ranging from \$800K-\$4.5M annually via hotel tax allocations and/or arts grant funds.
- Robust public-private partnerships, corporate sponsorships, and city-nonprofit co-productions.
- Strategic placemaking activating downtown and neighborhood venues to drive visitation and civic pride.
- Streamlined permitting processes improving producer experience.

Gap & Opportunity Summary

Durham contains several ingredients needed for a flourishing festival ecosystem that contributes to social, cultural, and economic impact (see Strengths above). It also lacks key ingredients which can be addressed (see below).

Missing Ingredients:

- Unified vision + strategy for festivals
- Effective coordination + advocacy structure
- Appropriate, tiered funding mechanisms
- Private sponsorship ecosystem



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– Infrastructure/venue upgrades for growth

Opportunities:

- Amplify existing Durham festivals and develop marquee festivals for Durham.
- Create flexible funding tools and incubation programs.
- Leverage public-private partnerships and HOT revenues.
- Reimagine underused spaces for activation.
- Strengthen communication and data-driven planning across agencies.
- Grow economic impact and community participation.

Recommendations for Phase 2: Festival Plan Development

1. Share and discuss findings with Durham Next board and other stakeholders.
2. Design and implement a coordinating structure.
3. Develop/refine funding programs, including public, tourism, philanthropic, and sponsorship resources.
4. Plan infrastructure investments in venues and public spaces.
5. Define action plan — timeline, cost estimates, metrics, and responsibilities.

Phase 2 will align closely with the Durham Destination Master Plan — enhancing tourism infrastructure, developing attractions and experiences, and fostering community alignment.

Conclusion

Durham’s festival ecosystem is at an inflection point: rich in creative assets and civic enthusiasm but currently lacking the structure, coordination, and funding mechanisms found in peer cities. With strategic investment and collaboration, Durham can evolve from a collection of successful independent festivals into a mature, nationally recognized “festival city” that drives both cultural vitality and economic growth.