Association of Independent Festivals Six-Year Report 2014

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LIVE MUSIC EXCHANGE

AIF

Association of Independent Festivals Report 2014

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Executive Summary

Over the six years the Association of Independent Festivals (AIF) has been in existence, the UK has suffered the deepest downturn since the Second World War[1] and the wettest summer weather since 1912.[2] Despite all of this, the UK's festival sector has not only survived but for the most part thrived in the face of such adversity, albeit with a few casualties along the way. While the boom of the first decade of the 2000s appears to be over, the UK festival sector as a whole appears to be relatively stable at present.

This report, to celebrate the AIF's sixth birthday, places the festival sector in its historical context and looks ahead to the future to see the issues currently facing festival promoters, with a focus on the AIF's member festivals.[i]

Since 2008, over 19,000 survey respondents have taken part in AIF's annual survey, and this report draws on this data to understand what it is that the UK loves about its festivals, our

[i] The membership between 2008 and 2013 was as follows:-

Year 1: Beautiful Days, Belladrum, Bestival, Big Chill, Bloom Festival, Cornbury, Creamfields, Electric Picnic, Evolution, Field Day, Glade Festival, Larmer Tree, Secret Garden Party, Shambala, Summer Sundae, Underage Festival, Womad.

Year 2: Belladrum, Bestival, Big Chill, Bloom, Cornbury, Creamfields, Evolution, Field Day, Glade, Larmer Tree, Secret Garden Party, Shambala, SW4, Underage Festival, Womad.

Year 3: Allez-oop, Bearded Theory, Belladrum, Bestival, Brownstock, Cornbury, Creamfields, Deer Shed, Eden Sessions, End Of The Road, Endorset, Evolution, Field Day, Glade, Glasgowbury, Green Man, Kendal calling, Larmer Tree, LeeFest, Nozstock, Outside Inside, Secret Garden Party, Shambala, SW4, The Beat Herder, Underage, Womad, Y Not.

Year 4: Allez-Oop (Grassroots), Bearded Theory, Belladrum Tartan Heart, Bestival, Brownstock, Summer Sundae, Cornbury, Creamfields, Deer Shed Festival, End Of The Road, Endorset, Evolution, Field Day, Glade, Glasgowbury, Glastonbudget, Greenman, In The Woods Festival, Kendal Calling, Larmer Tree, Leefest, London Green Fair, Nozstock, Outside Inside, Secret Garden Party, Shambala, Swn Festival, The Beat Herder, The Eden Sessions, The Magic Loungeabout, Tramlines, Underage, Womad, Y Not Festival.

Year 5: Bearded Theory, Belladrum Tartan Heart, Bestival, Bingley Music Live, Brecon Jazz, Brownstock, Camp Bestival, Cornbury Music Deer Shed Festival, End Of The Road, Evolution, Festibelly, Field Day, Folk On The Water, Glasgowbury, Glastonbudget, Greenbelt Festival, Greenman, In The Woods Festival, Shambala, Kendal Calling, Larmer Tree, Leefest, London Green Fair, Meltdown, No Direction Home, Nozstock, Outside Inside, Secret Garden Party, Stockton Weekender, Summer Sundae, Swn Festival, The Beat Herder, The Eden Sessions, The Magic Loungeabout, Tramlines, Truck Festival, Underage, Womad, Y Not Festival.

Year 6: 2000 Trees, Arctangent, Belladrum Tartan Heart, Bestival, Blissfields, Bournemouth 7s, Brecon Jazz, Brownstock, Cornbury Music, Deer Shed Festival, End Of The Road, Evolution, Festibelly, Folk On The Water, Glastonbudget, Greenbelt Festival, Heb Celt Fest, In The Woods Festival, Kendal Calling, Larmer Tree, Leefest, London Remixed, Nozstock, Open House Festival, Outside Inside, Rhythm & Vines, Secret Garden Party, Shambala, Stockton Weekender, Swn Festival, The Beat Herder, The Eden Sessions, Tramlines, Village Green, Wakestock, We Are Fstvl, Y Not Festival spending habits, how we travel to festivals, how we find out about festivals, our sleeping habits, and how we feel about technology, on-site police, and ticket reselling.

Headline findings include:-

- Since the AIF started, there have been **sixty-six member festivals in total**, including Bestival, Womad, Shambala, and Kendal Calling. Not all the member festivals still exist – the Big Chill and Glade, for instance, are sadly no longer with us. However, the Association of Independent Festivals continues to grow in strength, from the initial seventeen member festivals in 2008 to **forty-four members today** from the UK and beyond.

- The survey showed that, between 2008 and 2013, **the average festival-goer spent £395** per festival.

- **Spending on festivals appears to be steady**, based on finding the average of the year-on-year percentage change over the six years of the AIF survey. Spending has risen **by 3% per year on average** which is in line with inflation – adjusted for inflation, the average rise in spending per year has been 0.1%.

- Multiplying the total ticket sales per year from AIF's capacity data for its members (assuming all festivals sold out), and the average spend each year from the AIF survey, it is estimated that the **total spend by AIF member festival attendees between 2010 and 2013 was around £795,300,000**.[ii]

- Taking an estimated average spend between 2010 and 2014 of £409 and multiplying this figure by the total potential ticket sales of AIF member festivals in 2014 (assuming all festivals sold out), added to the estimated total for 2010-2013 above, **the spend by AIF member festival-goers for the past five years (2010 to 2014) is estimated to be approximately £1.01 billion.**

- Examining ticket prices for a number of UK festivals, including some AIF members, shows that, on average, **ticket prices have risen on average by 6.3% per year since 2008**.[iii] It should also be pointed out that artist fees have also increased during this period, however; Festival Republic's Melvin Benn, for example, estimated that the rise in headliner fee between 2004 and 2014 is 400%.[3]

- Based on six years' worth of data, the average amount of money spent in the local area per person was £30.77. Multiplying the total ticket sales per year from AIF's capacity data for its members (assuming all festivals sold out), and the average local spend each year from the AIF survey, **the total spend in the local area between 2010 and 2013 is estimated at around £60,300,000**. Including the estimated average spend for 2014 gives an estimated total figure

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[ii] Total spend figures are based on 11,350 AIF survey responses to the question about audience spend, which forms 0.5% of the total potential population of the potential AIF festival-going audience between 2010 and 2013, i.e. nearly 2.5 million potential festival-goers. This compares to 2693 respondents to the Festival Awards 2010 survey carried out by Virtual Festivals from 155,000+ opt-in email subscribers, representing approximately 1.7% of their subscriber base, therefore the AIF survey return rate is in line with the Festival Awards survey.

[iii] The Consumer Price Index (CPI) rose by 19% between 2008 and 2014 and rail fares have increased on average by over 40% in the same period, while actual earnings rose by 9% (Davis, Abigail, Donald Hirsch and Matt Padley (2014) A Minimum Income Standard for the UK in 2014. *Joseph Rowntree Foundation* website. Available from: <http://www.jrf.org.uk/sites/files/jrf/Minimum-income-standards-2014-FULL.pdf> Accessed 6 October 2014, p. 43; TUC (2013) Rail fare rise projector. *TUC* website. Available from: <http://www.tuc.org.uk/industrial-issues/transport-policy/rail-fares-set-rise-40-cent-2008-%E2%80%93-nearly-three-times-faster> Accessed 6 October 2014).

of £77,100,000 spent in the local area by AIF member festival-goers over the past five years (2010-2014).

- Even after car sharing and other transport initiatives, there has been a **significant increase in the average number of people travelling by car with two people or fewer**, with a 13.1% rise on average over the six years of the AIF survey.

- Since 2008, **the average number of survey respondents opting to travel by public transport appears to have decreased.**[iv]

- In 2013, **45.8% of respondents chose to attend a UK festival over a summer holiday abroad** with 35.7% willing and able to do both.

- The good news is that 85% of the festival-goers surveyed in 2013 said that they took their tent home. However, the bad news is that out of those who camp, nearly **7% of survey respondents admitted to leaving their tent behind in 2013**, either because it was broken (the most popular excuse), because they couldn't bear to carry it, because it was cheap and they could get another one, or because they lost it. Multiply this by the total number of AIF festival-goers in 2013 and that leaves an **estimated 18,000 tents left behind by AIF member festival-goers**,[v] or nearly 54 metric tonnes of tent-related rubbish potentially sent to landfill in 2013.[vi] **These statistics, coupled with the increase in private transport and decrease in public transport, perhaps suggests that the environmental impact of festivals appears to be increasing.**

- There appear to have been **significant reductions in crime in 2014**, including at AIF member festivals Kendal Calling[4] and Bestival.[5] The AIF survey results also appear to show that there was a small overall decrease in crime between 2012 and 2013.[vii]

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[iv] This is in line with a report by the Joseph Rowntree Foundation on the UK minimum standard of living which showed that transport costs have increased in general, largely because reductions in public transport mean that people increasingly need to supplement bus travel with other means of transport (Davis, Abigail, Donald Hirsch and Matt Padley (2014) A Minimum Income Standard for the UK in 2014. *Joseph Rowntree Foundation* website. Available from: <http://www.jrf.org.uk/sites/files/jrf/Minimum-income-standards-2014-FULL.pdf> Accessed 6 October 2014, p. 19.

[v] This is based on an estimate of an average of two people per tent.

[vi] Based on 3kg per tent.

[vii] It should be pointed out that the phrasing of the question about crime changed slightly in the survey, meaning that data prior to 2012 cannot be compared to more recent responses. The question in years 2008-2011 was phrased 'Have you ever been a victim of crime at a festival?' whereas from 2012 onwards, the question has been phrased as 'Were you a victim of crime at a Festival in 20XX'? The latter question gives a more accurate understanding of the change in crime over time and will be a useful addition to the AIF survey data in the future.

Introduction

Over the six years the Association of Independent Festivals (AIF) has been in existence, the UK has suffered the deepest downturn since the Second World War and the wettest summer weather since 1912. Despite all of this, the UK's festival sector has not only survived but for the most part thrived in the face of such adversity, albeit with a few casualties along the way. While the boom of the first decade of the 2000s appears to be over, the UK festival sector as a whole appears to be relatively stable at present. This report, produced to celebrate the AIF's sixth birthday, places the festival sector in its historical context and looks ahead to the future to see the issues currently facing festival promoters, with a focus on the AIF's member festivals.

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Independent: Not depending upon the authority of another, not in a position of subordination or subjection; not subject to external control or rule; self-governing, autonomous, free (*Oxford English Dictionary*).

Independence as an attitude, an aesthetic, a way of life. Independent as the binary opposite to the 'mainstream'. Independence as freedom: freedom from and freedom to.

In reality, independence in the festival sector is difficult to define[viii] – does it mean not being owned by a larger company, or rejecting commercial sponsors, or does it come down to a festival promoter's size in the global festival marketplace? The AIF's own definition of independence is that the maximum turnover an AIF festival company can have is not more than 5% of the global market share of a total of £15.1bn of the global live music industry, i.e. £0.755billion or £755million.[ix]

Festival expert Chris Anderton defines two broad trajectories within the outdoor rock and pop music festival sector since the free festival movement of the 1960s and 1970s. The first is the more overtly commercial festival, in which organisers seek multiple sponsorships and brand partners, and where there is no pretence at being 'independent'; examples include Reading/Leeds, the V Festivals and T in the Park.[6] The second trajectory – which is perhaps more in line with many of the Association of Independent Festival's (AIF) member festivals – is rooted in a post-hippie countercultural heritage and is demonstrated in the contemporary presence of a 'non-corporate, ethically minded, environmentally friendly sustainability agenda

[viii] Defining independence in other spheres of the music industries is often just as tricky – is independent music the same as 'indie' music, for example? Is independence a style, a sound, an ideology, a marketing ploy, even?

[ix] The figure for the global turnover of the live music industry is estimated by Dave Laing in his report, 'What's it worth? Calculating the economic value of live music', available on the Live Music Exchange website: http://livemusicexchange.org/blog/whats-it-worth-calculating-the-economic-value-of-live-music-dave-laing/

on the part of organisers who are reluctant to engage in corporate sponsorships; and in festival-goers who are attracted to these kinds of event'.[7] Anderton suggests that Glastonbury Festival perhaps typifies this latter type of festival – in its marketing, if not always its actuality – but that it is more often to be found at smaller or boutique events; in Shambala's fancy dress and permaculture workshops, for example, or the Secret Garden Party's focus on participatory arts.

The definition of festival itself is also problematic – should urban festivals be considered alongside outdoor camping festivals, for example? How about one-day festivals? What about festivals which focus on something other than music (food, beer, etc.) but which feature live music? Examining the current membership list of the AIF reveals a wide range of festivals and festival types, from Sheffield's urban Tramlines festival and the children-focused Camp Bestival, to the Eden Sessions' series of concerts in glass biodomes and the New Zealand vineyards of the Rhythm & Vines festival, again reflecting the diverse nature of the independent festival sector which the AIF represents. In an attempt to categorise festivals, academic Chris Stone offers the following list: the regional festival, the religious music festival, the urban festival, the holiday destination festival, the premium festival product, the secret festival, the teenagers' festival, the deliberately constrained festival, the boutique festival, the womens' festival, the green festival, the family festival, the dual-location festival, the economy festival, the political festival, the no-camping festival, and the virtual festival.[8] I'm sure you can think of festivals which fit more than one or more of these descriptions, again highlighting the difficulties in categorising what is a dynamic and ever-changing market. There now even appears to be a move away from using the word 'festival' among some promoters, preferring instead 'party' or 'fair' (or 'fayre'), which makes generalisations even more difficult. What all of this highlights, however, is the diversity of the festival sector in the UK in terms of geography, genre, demography, and ethos.

Independence, then, is perhaps best summed up in the following comments left by AIF survey respondents in 2013 reflecting on why they love festivals in general, and independent festivals in particular:-

> I am turned off by the thought of large commercial festivals where punters are seen as being a commodity in exchange for a headline act.
>
> I love the freedom and the live acts. Alternative stages also fun. Numbers need to be kept low. Spacious camping. No current mainstream acts as gets the wrong sort of people. No in your face advertising and commercial nonsense.
>
> Please don't forget people have a right to party. Government has steered us into festivals being one of a very few ways to celebrate and commerce is strangling the life out of the spirit. Government now has us corralled to legitimate festivals and petty civil servants are making the smaller less commercial festivals even harder to put on, helping the soul-less big mainstream festival factory kill and police the scene! The best festivals are the ones that their community enjoy adding to, the worst just suck money out of kids that don't know better.

The festival 'ecology'

The Live Music Exchange[9] team takes an 'ecological' approach in studying live music, in which the smallest venues and promoters are examined alongside the biggest, and in which a range of internal and external factors which impinge on the festival sector are taken into account in its analysis. In the UK (and beyond), different types of festivals and festival promoters rub along together in a symbiotic 'ecology', in which the social interactions between artists, promoters, agents and suppliers interact with external factors such as regulatory and physical frameworks (licensing, health and safety, noise regulations, cultural policies, planning regulations and transport) and socio-economic structures and conditions (who owns what, for example).


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Mapping the connections within the festival sector via the artists, the audiences, and the people behind the scenes would reveal a complex web of intersecting connections with the festivals as the nodes. Truck Festival headliners The Cribs, for example, also played at AIF member Tramlines in 2014, but played at the more overtly commercial Leeds and Reading in 2012. Also playing at Leeds in 2014 was drum&bass DJ/producer Andy C, who headlined Shambala in the same year. Examining some of the networks backstage, Serious Stages supply both Glastonbury and WOMAD[10]; Peppermint Bars manage bars for Bestival and Rockness[11]; and Showsec look after Lovebox and Festibelly.[12] In this way, the festival sector is linked both front- and backstage via the relationships between all those who come together to put on the show.

Mapping the connections between festivals and festival-goers would create an even more complex web. 59.3% of 2013's survey respondents attend more than one festival each summer, for instance, which means that there are plenty of festival-goers who criss-cross the festival map. In this way, festivals of all shapes and sizes rub along together, those for profit and those not-for-profit, sometimes in competition, sometimes in close collaboration. What matters is that they are all part of a larger festival 'ecology'. As a result, the stronger the festival sector as a whole, the better for everyone: promoters, artists, and festival-goers alike.

The Association of Independent Festivals

The Association of Independent Festivals began in 2008 with the aim of empowering and representing the independent sector, to help the businesses of its individual members and the overall needs of the independent festival sector by providing a forum and a collective voice for its members and for the sector as a whole.

MEMBERS OF AIF...

- 1. **2000Trees** – UPCOTE FARM, CHELTENHAM
- 2. **ArcTanGent** – FERNHILL FARM, SOMERSET
- 3. **Beat-Herder Festival** – RIBBLE VALLEY, LANCASHIRE
- 4. **Barn On The Farm** – GLOUCESTERSHIRE
- 5. **Belladrum Tartan Heart Festival** – BEAULY, INVERNESS-SHIRE
- 6. **Bestival** – ISLE OF WIGHT
- 7. **Blissfields** – VICARAGE FARM, WINCHESTER
- 8. **Bournemouth 7s** – CHRISTCHURCH, DORSET
- 9. **Brecon Jazz** – BRECON, WALES
- 10. **Brownstock Festival** – MORRIS FARM, ESSEX
- 11. **Camp Bestival** – EAST LULWORTH, DORSET
- 12. **Cornbury** – OXFORDSHIRE
- 13. **Deer-Shed Festival** – BALDERSBURY PARK, N YORKSHIRE
- 14. **Eden Sessions** – NR ST AUSTELL,CORNWALL
- 15. **End Of The Road Festival** – LARMER TREE GARDENS, N DORSET
- 16. **Evolution Festival** – GATESHEAD, NEWCASTLE
- 17. **Festibelly** – LYMINGTON, THE NEW FOREST
- 18. **The Fling Festival** – HYLANDS PARK, CHELMSFORD
- 19. **Glastonbudget** – TURNPOST FARM, LEICESTERSHIRE
- 20. **Greenbelt Festival** – CHELTENHAM RACECOURSE
- 21. **Hebridean Celtic Festival** – ISLE OF LEWIS, SCOTLAND
- 22. **In The Woods Festival** – ENCHANTED SECRET WOODLAND
- 23. **Kendal Calling** – LOWTHER DEER PARK, LAKE DISTRICT
- 24. **Larmer Tree Festival** – LARMER TREE GARDENS, SALISBURY
- 25. **LeeFest** – BROMLEY, SE LONDON
- 26. **London Remixed** – BETHNAL GREEN ROAD, LONDON
- 27. **AIF Festival Congress** – CARDIFF, WALES
- 28. **Meltdown** – SOUTH BANK CENTRE, LONDON
- 29. **No Tomorrow** – WOLLATON PARK, NOTTINGHAM
- 30. **Nozstock** – ROWDEN PADDOCKS, BROMYARD
- 31. **Pangaea** – OXFORD ROAD, MANCHESTER
- 32. **Rhythm & Vines** – HEXTON, NEW ZEALAND
- 33. **The Secret Garden Party** – MILL HILL FIELD, HUNTINGDON
- 34. **Shambala Festival** – NORTHAMPTONSHIRE
- 35. **Sonisphere** – KNEBWORTH HOUSE, HERTFORDSHIRE
- 36. **Starry Skies** – BARTON HILL FARM, WALES
- 37. **Stockton Weekender** – STOCKTON-ON-TEES
- 38. **SWN Festival** – CARDIFF, WALES
- 39. **Tramlines** – SHEFFIELD
- 40. **Truck** – STEVENTON, OXON
- 41. **Village Green Festival** – SOUTHEND ON SEA
- 42. **Wakestock** – ABERSOCH, NORTH WALES
- 43. **We Are FSTVL** – UPMINSTER, ESSEX
- 44. **Y-Not Festival** – PIKEHALL, DERBYSHIRE

Since the AIF started there have been sixty-six member festivals, including Bestival, Womad, Shambala, and Kendal Calling. Not all the member festivals still exist – the Big Chill and Glade, for instance, are sadly no longer with us. However, the Association of Independent Festivals continues to grow in strength, from the initial seventeen member festivals in 2008 to forty-four members today from the UK and beyond.

The overall state of the independent festival sector in 2014 appears to be in fairly robust health, and the better weather, the lack of Olympics, and the 'Glastonbury effect' (see later) appear to have enabled festival promoters, including AIF members, to have a fairly good summer.[x] There have been some casualties, however. Indeed, in a somewhat alarmist article entitled 'Festivals in crisis', discussed later in the report, the *NME* described 2014 as a 'summer of cancellations' and listed the following festivals as having cancelled or otherwise in 2014: The Hub, Third Rail, Essexfest, I Am Music, Boardmasters, Another World, ATP's Jabberwocky, Alt-Fest, Surround, Mas Mas, Homegrown; the following were listed as 'never got started': Oxegen and Rockness; and Camden Crawl was listed as 'liquidated'.[13] While such a list may at first seem cause for concern, it is perhaps inevitable that the festival sector should experience some casualties in such a competitive and saturated market.

To understand the current state of the UK's music festivals market, it is worth outlining a brief history of festivals from the 1950s to the present day.

A brief history of festivals

1950s

- A 'decade of festivals', the 1950s was book-ended by the Festival of Britain in 1951 and the first 'Caribbean Carnival' in Notting Hill in 1959[14]
- The birth of open-air jazz festivals such as the Beaulieu Jazz Festival (1956-1961), forerunner of a host of jazz and blues festivals that sprung up in the early 1960s
- The 1950s also saw the birth of significant folk festivals in the UK and the US, including the Sidmouth Folk Festival (1955) and the Newport Folk Festival (1959, USA)

1960s

- National Jazz Federation festival (1961) >> National Jazz & Blues event (1963 – feat. The Rolling Stones) >> National Jazz, Blues & Rock Festival (1972)[15] >> descendent of Reading Festival
- Cambridge Folk Festival (1965)
- Monterey International Pop Music Festival (USA, 1967)
- Isle of Wight Festival (1968)
- Woodstock (USA, 1969)
- Altamont (USA, 1969)

1970s

- Beginning of the free, anti-commercial festival movement that ran through the 1970s and 1980s: while commercial events were in the ascendance in the late 1960s and early 1970s, they were soon overtaken in number by free festivals (Anderton 2011, p. 149)

[x] Sold out festivals include The Beat-Herder, Belladrum Tartan Heart, In The Woods, Kendal Calling, Secret Garde Party, Shambala, and Y-Not. Source: *eFestivals*.

- Glastonbury Festival Of Contemporary Performing Arts (1970)
- Greenbelt Festival (1974)
- Fairport's Cropredy Convention (1976)
- Reading Rock Festival (1977, developed from the National Jazz, Blues & Rock Festival that began in the 1960s)

1980s
- Brecon Jazz Festival (1983)
- Public Order Act 1986, which effectively crushed the free festival movement, allowing more commercial events to flourish

1990s
- Festival attendance in the UK before the 1990s was very much a niche activity for a number of years; festivals were perceived as external to the 'mainstream' until the late 1990s.[xi]
- Womad (1990)
- Larmer Tree Festival (1990)
- Fleadh Festival (established 1990 in Finsbury Park by Mean Fiddler, ended in 2004)[xii]
- Castlemorton Common rave (1992, a free party which attracted thousands of revellers and contributed to the anti-free festival provisions in the Criminal Justice and Public Order Act 1994, which made it very difficult to stage unlicensed festivals)
- Phoenix Festival (1993, established by Mean Fiddler's Vince Power)
- Meltdown (1993)
- T in the Park (1994)
- Glastonbury first screened on Channel 4 (1994 – the BBC took over in 1997)
- The Big Chill (1995, effectively ended in 2011)
- Hebridean Celtic Festival (1996)
- V Festival (1996)
- Truck Festival (1998)
- Creamfields (1998)
- Leeds Festival (1999, sister festival to Reading)

2000s
The festival sector experienced a tremendous growth period between 2000 and 2011. As a result, festivals are now popularly regarded almost as a 'rite of passage' for young people in the twenty-first century.[16] Growth has only just started to tail off (see Figure 1) but it is probably safe to say that the boom of the early twenty-first century appears to be over for the festival sector.

[xi] This author first attended Glastonbury in 1995 and the repeated question from her peers was, 'Why would you want to go *there*?!'
[xii] Note that a one off event called the London Feis was organised by Vince Power in 2011.

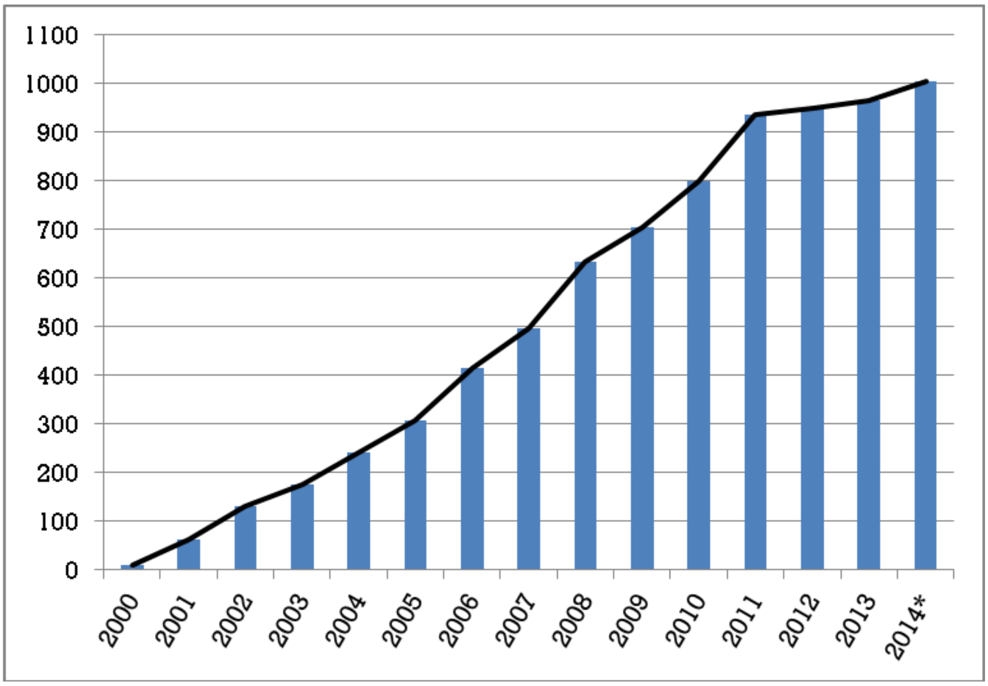

Figure 1: No. of UK festivals listed on eFestivals (not incl. N Ireland). Source: eFestivals. *Data for 2014 collected on 7 October 2014.

A similar slow-down can be seen in the independent sector by examining the inception of AIF and ex-AIF member festivals, the majority of which were established in the 'boom period' of the first decade of the twenty-first century, as can be seen in Figure 2 below.

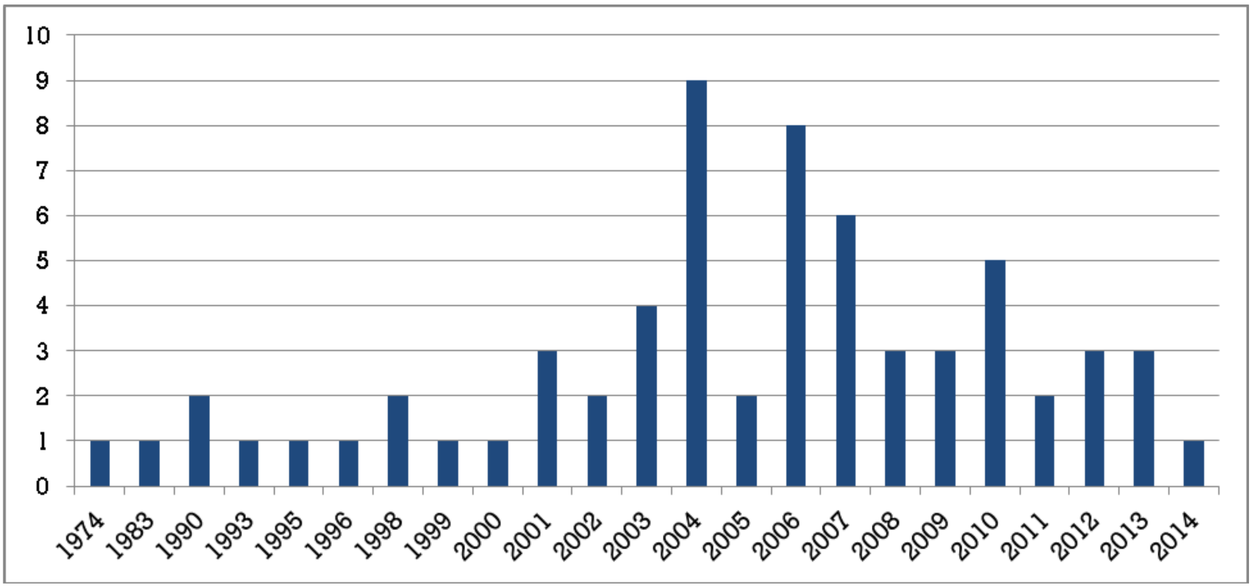

Figure 2: Number of AIF and ex-AIF member festivals founded by year

Nevertheless, the popularity of festivals appears to be relatively stable at present, and it is worth highlighting that the UK festival market, via Live Nation and AEG Live, is now integrated into an international corporate live music industry which has become more and more professionalised over the past thirty or so years. In addition, the 'festival season' is also now a fixture in the UK's media landscape, with the BBC providing coverage of major events, most notably Glastonbury and T in the Park.[xiii] There are signs, however, that the growth of the festival market has slowed down and it appears that the festival sector as a whole is currently on a relatively even keel, albeit with a few high profile casualties in 2012 and 2014, the causes of which are examined below.

Risk factors for the festival sector and examples of cancelled festivals

Taking the ecological approach outlined above, the festival market is affected by both internal factors and external factors which can impact on festivals' success or failure.

Internal factors can be:-

- human (e.g. the artist pulls out of the gig, or audience behaviour is problematic);
- physical (e.g. problems with the venue/site, for instance, or failure of technology);
- economic – internal (e.g. the festival promoter does not sell enough tickets or funding is withdrawn); and/or
- organisational (e.g. the event has been poorly managed).

External factors can be:-

- environmental (e.g. poor weather);
- economic – external (e.g. unexpected increases in costs such as policing, etc., recession or even global economic crisis);
- related to market forces (e.g. market saturation/intense competition – at home and/or abroad – leading to low ticket sales or artist unavailability);
- political (e.g. government policy directly impacts on festival promoters, for instance, or political unrest can lead directly to cancellations); and/or
- related to 'taste' (e.g. the artists booked or even festivals themselves lose public appeal).

The following section will focus briefly on a few festivals which were forced to cancel to see how these factors can work in practice. It should be pointed out that this list does not contain an exhaustive list of festivals which have been cancelled; it is indicative rather than definitive:-

- Glade Festival was a victim of external economic factors, in that the festival, which began in 2004, was forced to cancel in 2010 before tickets went on sale. According to the promoter, this was because of 'greatly increased' costs and restrictions imposed upon the organisers for policing, security and stewarding.[17]
- In what proved to be a very difficult year overall for the festival sector in 2012, The Big Chill (est. 2002) was forced to cancel before tickets went on sale, as a result of external market forces. Promoters cited a lack of artist availability and scheduling problems with London 2012 Olympics. The Big Chill has not since returned despite the purchase of the brand in 2009 by Festival Republic when original owners ChillFest Ltd went into voluntary liquidation following poor ticket sales.[18]
- Touring festival Sonisphere, which started in 2009, also cancelled in 2012, citing the current economic climate, touring problems, and 'a bit of bad luck': 'Unfortunately circumstances

[xiii] Glastonbury forms a significant part of the BBC's Music Strategy, launched in June 2014 – Glastonbury is now listed alongside the BBC Proms as an integral part of the BBC's music output. For more information, see http://www.bbc.co.uk/mediacentre/mediapacks/bbcmusic

have dictated that we would be unable to run the festival to a standard that both the artists and that Sonisphere's audience would rightly expect'.[19] Sonisphere returned to the UK in 2014.

- Underage Festival was also cancelled in 2012; the London Olympics forced the festival to move venues and meant a lack of availability of appropriate production crew and equipment.[20] It has not returned.
- Creamfields was forced to cancel during the event itself in 2012: the two-day event took place on Saturday but was cancelled on Sunday due to heavy rain which caused flooding in parts of the arena and campsite.[21]
- Guilfest suffered a 'perfect storm' of contributory factors in 2012 which caused its cancellation in 2013. Competition from major events (including the London 2012 Olympics, and Paul Simon and Bruce Springsteen concerts taking place in Hyde Park over the same weekend), combined with heavy rain, affected the sale of day tickets, and meant that the festival was left with debts of £300,000 and subsequently went into administration. Guilfest returned in 2014 but has since been declared insolvent, leaving some artists unpaid at the time of writing.[22]
- In 2014, Alt-Fest cancelled two weeks before the event; organisers blamed low ticket sales, the last minute departure of an investor, a "costing error" and high costs of putting on the event.[23]
- Also in 2014, the I Am Music Festival, which was expected to attract up to 8,500 people, was cancelled two days before the event because the local council withdrew permission, citing concerns over safety and security.[24]
- Beleaguered festival promoter ATP was forced to cancel the Jabberwocky event three days before it was due to take place, stating that 'If we had gone ahead; it would have 100% been the end of [us]'.[25] Commentators point the finger at the venue change and to the promoter's unfortunate recent business history as a result of poor ticket sales at other events; the promoter's woes have been exacerbated by problems with ticket refunds.[26]
- Finally, Boardmasters' final day had to be cancelled in August 2014 due to extreme weather conditions caused by Hurricane Bertha.[27]

As can be seen, the success or failure of a festival may be as a result of the occurrence of one or more of the risk factors above, highlighting the relative vulnerability of an industry which is space- and time-dependent, which operates within a crowded leisure market, and which is often at the mercy of the weather. The festival sector has generally proven resilient, however, and the British public's interest in festivals still appears to be strong. The following section will examine the festival market in context and highlight any threats and opportunities for the festival sector, with a focus on AIF member festivals.

The festival market in context

Festivals and the state – austerity and secondary ticketing

What is obvious from studying the history of festivals in the UK is the extent to which the state – in the form of legislation and local authority services – impacts on festival culture. As Green Man's 'professor in residence', George McKay, wrote in 2000, 'The state has veered wildly in its attitudes towards festival culture, from support and donation of land for a national free festival [the Windsor Free] in 1975... to periodic clampdowns on festivals with new legislation over the decades'.[28] The free festival movement of the 1970s and 1980s was pretty much kyboshed following the Public Order Act of 1986, and dealt the final blow by the Criminal Justice and Public Order Act 1994, which made it very difficult – if not impossible – to stage unlicensed festivals. At the other end of the scale, however – and showing how far festival culture has now spread into the mainstream – Conservative Prime Minister David Cameron can regularly be found at AIF member Cornbury Festival, while Prince Harry has been to Glastonbury at least once.[29]

Even so, in 2014's political climate, the Coalition government's austerity measures have impacted on every corner of society, and the festival sector has also been affected. Policing costs have increased, for example, as police forces across the UK have suffered swingeing cuts.[30] Festivals require robust communications and co-operation between local authorities and event promoters with regard to matters such as policing, sanitation, parking and clean-up operations, and the loss of jobs across a wide range of sectors will no doubt impact on previously solid relationships.[31]


© Tracy Morter

One topic which causes blood pressure to rise on both sides of the debate is that of secondary ticketing, particularly as to whether the government should regulate the secondary market. At the time of writing, the All-Party Parliamentary Group on Music has made recommendations to the Government to amend the Consumer Rights Bill, including enforcing transparency in the market and ensuring fair compensation for victims of crime.[32] Whether the recommendations will see a change in legislation remains to be seen, however. It is interesting to note that in 2013 only 0.2% of AIF survey respondents admitted to buying a ticket with the purpose of reselling it (down from 0.8% in 2012) although 19.2% admitted to having had to legitimately re-sell a festival ticket (i.e. purchased a ticket and then found they could not attend - only 0.9% made a profit; the rest sold for face value or less). The demand for secondary ticketing is certainly there, but the live music industries must work as hard as possible to ensure that they don't kill the goose that laid the golden egg by avoiding inflated ticket prices and opaque booking fees.

Consumer confidence

Following the economic crisis which began in 2008, the economic situation in the UK continues to be delicate and changeable. This could affect spend on non-essential items like festival tickets and also affect spend at festivals as a whole. One issue which may impact negatively on the festival sector with regards to consumer confidence is the fall-out from festival cancellations, particularly with regard to ticket refunds. The most high-profile case in 2014 was

ATP's Jabberwocky. As reported by the *NME* in the previously mentioned article entitled 'Festivals in crisis', problems occur when festival promoters and ticket sellers cannot agree on the responsibility for ticket refunds, or if one company goes into liquidation. In the case of Jabberwocky, 'ATP told customers who'd bought tickets with [ticket seller] Dash to contact them for a refund, only to find out that Dash claimed they'd "given ATP all funds that Dash received for ticket sales to Jabberwocky"'.[33] The *NME* suggests that consumers should only buy tickets from a dependable agency and to check that a festival has cancellation and abandonment insurance, placing some of the onus on the festival-goer to protect themselves. The article then goes on to ask whether more regulation is needed to protect the consumer. As Stephen Endersby of WeGotTickets states in the same piece: 'There's a risk of loss of faith in the live music industry, especially regarding festivals, and if we keep seeing things like Jabberwocky happen, are people going to risk buying tickets in the future?'[34]

Is PRS for Music getting tough on festival promoters?

PRS for Music was unsuccessful in its attempt to increase the tariff for festival promoters in 2010-2011.[35] In a high-profile case in 2014, veteran promoter of the Hop Farm festival, Vince Power, has been banned by the High Court from staging any live events in the UK until a legal dispute with PRS for Music is settled, following reports that editions of the Hop Farm music event from 2009-2012 seemingly went ahead without a licence from PRS.[36] This perhaps acts as a timely reminder for festival promoters to ensure that their PRS receipts are in order.

Festivals and the broader music industries

As was much reported at the end of the first decade of the 2000s, revenue from live music overtook that of recorded music for the first time in 2008.[37] In September 2014, UK Music's 'Measuring Music' report estimated that live music's economic contribution to the UK economy in 2013 was £789million out of a total of £3.8billion across the wider music industries, which experienced 9% growth from 2012 to 2013.[38] The 'Wish You Were Here' report in October 2013, also by UK Music, claimed that 6.5million 'music tourists' generated £2.2billion for the UK economy while attending UK festivals and concerts in 2012.[39] Festivals, therefore, continue to play a vital role in artists' incomes, and therefore also the incomes of artists' agents, promoters, managers, etc. across the music industries. Indeed, the independent festival sector is an important place for artists at the start of their career – taking the ecological approach, the unsigned stage at Truck may be just as important to the festival ecology as the main stage at Glastonbury in the long run.

Indeed, as discussed earlier, festivals ranging from the smallest to the largest are inextricably linked – Leefest and In The Woods, for example, to Glastonbury and Reading - and the fate of the UK's biggest festivals does have an impact on the smaller festivals. As shown on page 6, while those in the independent sector may not work directly with these major festival promoters, secondary and tertiary industries including security and staging work across the spectrum. US-owned Live Nation is now heavily entwined within the UK's festival sector – the company is involved with V Festivals, Reading, Leeds, T in the Park, Latitude, and ex-AIF member Creamfields among others (and Big Chill before its demise) - and Live Nation is currently increasingly involved with emerging markets such as, generically, Electronic Dance Music (EDM), and, geographically, South America, Asia and Australasia. Live Nation's global manoeuvres are therefore worth keeping an eye on, as indeed are those of the other major UK festival promoters: SJM, Metropolis, DF Concerts, and AEG Live.

Exacerbated by the loss of income within the recording sector and a lack of tour support and artist development, the conglomoration of the large-scale festival sector could, however, lead to standardisation and stagnation within the sector as whole. Indeed, there have already been some accusations of 'monotony' within the popular press, with one journalist complaining about the homogenisation of global festival line-ups[40] and another about why the 'classic' album set is ruining festivals'.[41] A YouGov report published in May 2014 suggested that 28% of surveyed festival-goers believe that festivals have become too corporate, 14% say that there are now too many festivals with the same acts doing the rounds, and 11% say they are becoming bored with festivals.[42] James McCoy, Research Director at YouGov, commented on the research: 'The report shows that while demand for music festivals has remained high, it will be interesting to see which events survive pressure on disposable income as the market becomes increasingly saturated. The challenge for festival organisers is to act upon the grievances of festival goers, in order to provide an experience that is value for money, enjoyable and likely to result in return visits'.

Festival promoters are having to work harder to provide unique experiences within the saturated British market. 'Boutique' festivals such as Secret Garden Party and Boomtown, for instance, are taking on the ideas (and ideals) of participatory festivals such as Nevada's Burning Man to introduce new and quirky experiences to their events, including encouraging fancy dress and participatory art and experiences.[43] Other festival promoters are diversifying their offer. In 2014, Festival No. 6 provided a three-course banquet cooked by top chefs for an extra cost,[44] while Blissfields continued to branch into cinema via its independent film festival.[45]

The 'Glastonbury effect'

It is undeniable that Glastonbury Festival impacts significantly on other festivals and on the sector as a whole; what is known as 'the Glastonbury effect' in some quarters. The BBC's extensive coverage of Glastonbury pushes the festival concept into the national consciousness and Glastonbury's fallow years can adversely affect the whole UK festival sector. This is summed up by Serious Stages' Steven Corfield:-

> Not only did we miss [Glastonbury Festival], but I heard a fascinating thing from other promoters, who told me they missed it too … They say their festivals don't do as well when there is no Glastonbury. When Glastonbury is on, it's on the news the whole time, the BBC is pumping it out, and everyone thinks … festivals.[46]

However, another effect of Glastonbury's fallow years is to make available the part of its audience which still wants to attend a large-scale event when Glastonbury is not on. As *The Independent* put it, 'Missing Glastonbury this year? Not to worry: the Scottish festival [T in the Park] that usually welcomes an exodus of Glasto survivors takes up the slack as its bill ranges from big tunes to big beats via all points in between'.[47] In this way, the interconnectedness of festivals across the sector can again be seen.

The future of Glastonbury for the foreseeable future seems stable; Michael Eavis is now 78 but his daughter, Emily, appears to be (literally) taking over the family farm and it is likely that Glastonbury can and will continue without her father; festivals are much more than the work of one person after all. Indeed, in 2014, Michael Eavis announced that his last Glastonbury will be 2020, when he is 85. Whether the festival continues to command the column inches and airtime it enjoys in 2014 in the future remains to be seen, however, but in the meantime, the entire festival sector generally benefits from Glastonbury's success. It should also be pointed out that Glastonbury 2015 sold out in record time – it took just 25 minutes to sell 120,000 tickets (on top of 15,000 already sold).[48]

Competition in and outside of the UK

As 2012 showed, external events – particularly free, publicly subsidised events – can impact negatively on festivals; audiences are limited by time and money, after all. One festival promoter postponed his 2014 festival until 2015, for example, partly blaming the World Cup and partly blaming so-called 'barbeque culture'.[49] Another Olympics in the UK is not on the cards any time soon and neither is the World Cup but, as far as possible, festival promoters should work in consultation with a number of stakeholders in order to avoid clashes, including the local authority, long before their event is due to take place.[50] Arts Council and local authority cuts may leave a hole in the publicly-funded festival calendar which could well be an opportunity for festival promoters.

© Sam Neill

The festival industry across the world is now big business. The United States, in particular, appears to have caught the festival bug and festivals like Coachella and Bonnaroo are now major players in the global festival market.[51] There was some fear that European festivals would impact negatively on the British market,[xiv] but this does not appear to have been the case to any great extent.[xv] The AIF survey showed that in 2013, 45.8% of respondents chose to attend a UK festival over a summer holiday abroad with 35.7% willing and able to do both. Interestingly, AIF member Bestival has announced its plans to expand globally: in August 2014, festival director Rob da Bank announced a distribution deal which will see the introduction of a US counterpart for the festival, and into other countries across Europe as well.[52] Reflecting the general shift from 'glorious amateurism'[53] to a more business-minded practicality across the live music sector, da Bank stated that 'The deal has been a long time coming. I've never been in this industry for the money but now I'm 40 with three small kids, it's time to get business minded. We've made a real impression on the festival market and pioneered a lot of ideas. People think Bestival pours multi-millions into my bank account every year and it doesn't… that's not a sob story but now it's time to knuckle down a bit. My twenties and thirties were a total laugh but now I have to be responsible'.

[xiv] See Brennan and Webster's UK Festival Market Report 2010

[xv] It is also interesting to note perceptions of festivals' impacts across borders on the continent, and the impact of public subsidy: in October 2014, Festival Republic announced that the 2015 edition of its Hove Festival in Norway will not take place: 'It is with a great deal of regret that Festival Republic have announced that Hove Festival will not happen in 2015. The Scandinavian market has always been busy and the recent addition of Tinderbox Festival with a significant public subsidiary will make what was a tough event economically into an almost impossible one without similar level of support from the public institutions'. See Malt, Andy (2014) Festival Republic cancels Norwegian festival, partly blames new Danish rival. Complete Music Daily website, 3 October. Available from: <http://www.completemusicupdate.com/article/festival-republic-cancels-norwegian-festival-partly-blames-new-danish-rival/> Accessed 6 October 2014.

Technology – social media, RFID and wi-fi

Festival promoters and festival-goers alike have made much use of 'free' social media sites such as Facebook. However, as reported by *Time* magazine in March 2014,[54] Facebook has been 'dialling down' the organic reach of its pages, possibly by as much as 50%. What this means in practice is that each Facebook post reaches half the number of people 'liking' a page than it used to. This is probably a deliberate move by Facebook (although the company has declined to comment), possibly to increase revenue from sponsored ads, i.e. if you want your fanbase to see your post, you're going to have to pay for it,. Perhaps social media is not the panacea festival promoters may hope it is, but for the meantime, some festival promoters certainly appear to be investing large amounts of time and money in increasing their social media profiles.

The other major technology story for the festival sector is RFID (Radio Frequency Identification) wristband technology, used for access control, cashless payments, and social media integration.[55] RFID technology is already is use by large festivals such as V, Isle of Wight and Reading, and also by AIF members Bestival and Rhythm & Vines. AIF survey respondents were mostly in favour of using 'cashless' technology for tickets/entry (an average of 55% said 'yes' to being interested, 2011-2013), with fewer interested in using the technology for bars (42%), catering (38%) and markets/merchandise (30%).[56] 84.1% of survey respondents had had experience of cashless technology for payments at a festival in the 2013 survey.

Whether festivals should provide wi-fi for festival-goers onsite is another issue for festival promoters, particularly for those who promote festivals in rural areas with limited mobile coverage. In 2014, Glastonbury, for example, provided attendees with 4G wi-fi hotspots via its 'Highspeed Herd', fibre-glass cows which were, in fact, wi-fi transmitters.[57] When deciding whether to utilise any such technology, it may be worth bearing in mind the following quotation from Channel 4 senior producer, Janine Smith, which sums up how technology has changed the festival experience in the twenty-first century:-

> Mobile phones have made a big difference, I've really noticed that. Now you actually find people. Society has brought about this change. The vibe isn't to lose yourself any more – it's to party with the friends you know ... Once you went to lose yourself, now it's a found weekend. Because it's easier to stick with what you know and people aren't so open. The bulk of people have credit cards, phones and their mates.[58]

Accessibility

January 2014 saw the publication of Attitude is Everything's State of Access report.[59] The charity, which improves Deaf and disabled people's access to live music in the UK, has run a number of high-profile campaigns over the past couple of years. Its State of Access Report 2014 highlights the importance of improving access for the live music industry and also the positive results that come from making events more accessible. Headline figures include: 95% of respondents had experienced disability-related issues when booking tickets and 83% had been put off buying tickets after finding it inaccessible. However, Attitude is Everything claims that it makes financial sense to invest in making festivals more accessible. The charity's report found that improvements to Reading Festival's accessibility over the past five years have resulted in a 286% increase in ticket sales to Deaf and disabled people and their family and friends, and estimated that the economic impact of disabled people attending Reading Festival in 2013 was £187,000.

The weather and climate change

2012 was a record year for rainfall across the UK: Met Office figures for the summer show that it was the second wettest across the UK in the national record that goes back to 1910 and the wettest since 1912.[60] Unfortunately, according to the Met Office, wet and unpredictable weather could be here to stay, although 2014 was generally better weather-wise and there appears to be evidence that global warming may have paused temporarily.[61] In terms of temperature, the UK is projected to experience temperature increases of up to 3°C in the south and 2.5°C further north.[62] As for rainfall, 'Europe shows a strong contrast in projected precipitation changes, with large decreases in the south and large increases in the north. The UK falls towards the northern region with generally increasing precipitation, with projected increases of up to 10%, though some southern parts of the UK may experience decreases of up to 5% … Rainfall extremes are generally projected to increase, particularly during winter, but changes during summer are more uncertain'.[63]

The effects of this on the festival market are more likely to be gradual than sudden, giving festival promoters, particularly the larger ones, time to operate strategically and make adjustments according to the prevailing and likely conditions. According to the AIF survey, the impact on festival-goers amounts to the following:-

- Respondents may be more likely to go to a festival abroad and/or go on summer holiday abroad because of bad weather;
- Some respondents have left tents behind due to wet weather.

Whilst it is possible that increasingly poor weather may encourage more festival-goers to forego British festivals for sunnier climes, this does not appear to be a major problem as yet and competition from European festivals does not appear to have made a significant impact on British festivals. Indeed, the British public (and visitors) appear to be a very hardy bunch – even though Glastonbury and other festivals regularly suffer from poor weather, festival-goers appear to accept this as part of the experience as the appetite for festivals such as Glastonbury does not appear to have abated.

Now that the context for the UK's festival sector has been established, the report will now examine in depth the six years' worth of data from the AIF survey, to identify the main trends over time.

Motivations for attending

Over the six years of the survey, 'The general atmosphere and overall vibe, character and quality of the event' has been by far the most important motivation for attending a festival (53.2% average).

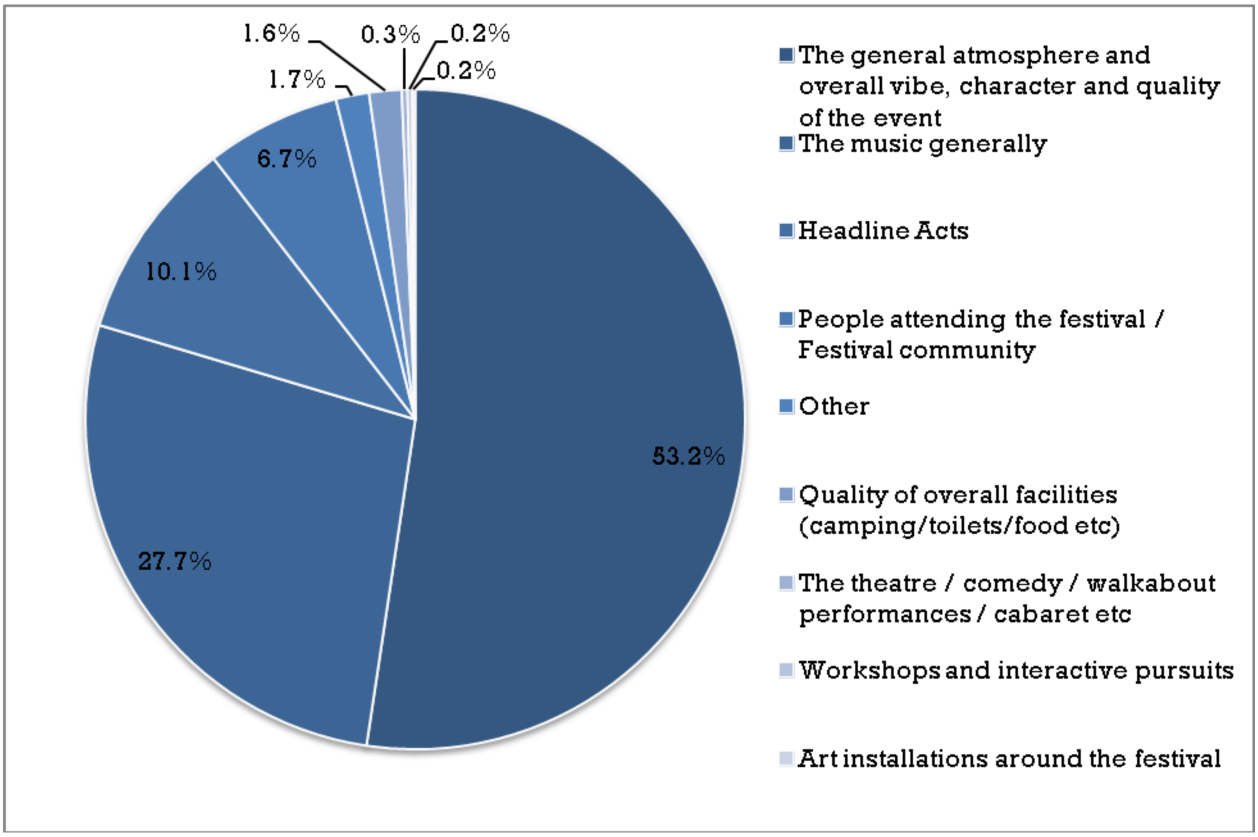

Figure 3: Motivations for attending 2008-2013 average

Of those who rated 'The general atmosphere' as the most important factor, here are some comments about why they love festivals (from 2012 survey):-

> Just the carefree attitude even if it is for only a few days. It feels good and re-charges the batteries ready for the next round.
>
> I have always attended festivals, for the past 25+yrs and love the time meeting up with friends. They keep me young!
>
> The atmosphere is amazing, I like meeting new people in the day and going out to the arena with my friends at night.

Over the six years of the survey, the next highest motivating factor for attending festivals in general is 'The music generally' (27.7% average) and 'People attending the festival / Festival community' (10.1%). Again, some comments from the survey (2012):-

> Love being surrounded by music constantly, and the amazing atmosphere. Also love the ability to stumble across a wonderful new band at any point.
>
> A reasonably priced way to see loads of music, particularly for stumbling upon bands previously unknown to me. Love the atmosphere, going to sleep in a tent with festival people sounds all around, bumping into friends, meeting new people and eating a great variety of mostly delicious food!
>
> What motivates me to go to festivals is of course an awesome line up and deadly set up with crazy stage tents, but what I find equally important is what kind of vibe and atmosphere is at the festival; it's nice to go to a festival knowing everyone's going to have a good time and not go to just ruin it for others.

When respondents had answered 'other', significant responses included 'everything' and because the festival was family friendly.

Other studies in festival motivation

There have been a number of academic studies from around the world into why people are motivated to attend festivals, which further illustrate the multitude of motivational factors as to why people attend music festivals. Heather Bowen and Margaret Daniels,[64] for example, offer the following overview of motivating factors as discussed by a number of scholars:-

Why festival-goers attend festivals	**Formica & Uysal (1996)**	**Crompton & McKay (1997)**	**Faulkner *et al* (1999)**	**Tomljenovic *et al* (2001)**	**Nicholson & Pearce (2001)**	**Thrane (2002)**
General socialisation	✔	✔	✔	✔	✔	
Socialisation with family or friends	✔	✔	✔	✔	✔	
Novelty/excitement/thrill	✔	✔	✔	✔	✔	
Music/musical artists/programme			✔	✔		
Entertainment	✔					✔
Party			✔	✔		
Cultural exploration/local culture		✔	✔			
Escape/recover equilibrium		✔			✔	
Ancillary activities			✔			
Local attractions			✔			
Gregariousness		✔				
Variety					✔	

Table 1: Overview of motivating factors

Based on their examination of festival-goers' motivations, Gemma Gelder and Peter Robinson undertook comparative research into Glastonbury and V Festival and offered the following two recommendations for festival promoters:-

Music alone is not enough; multiple motivations must be considered: 'Although the main motives for attending the V Festival was for the music/artists playing, it is equally important to create a fun and festival atmosphere that offers ample opportunity to socialise and have non-musical experiences ... [Festival promoters should consider] realigning their strategies in service delivery to first creating an atmosphere and ensuring an ambient environment focusing on social/leisure, family togetherness, and excitement'.[65]

Socialising is a key motive: The most consistent and recurring motive for attendance across previous research and this study was socialisation – meeting for social purposes - hence festival promoters 'need to offer a wider range of ancillary activities for those to whom the music is less important'.[66]

The above shows that people attend festivals for a variety of reasons but also that a major reason for attending is for the variety on offer.

It is worth noting academic Simon Frith's observation that T in the Park in 2006 sold out before any acts had been announced because it suggested that 'what is valuable for the festival audience is not the live performance of a particular group for its particular fans, but 'live performance' as a kind of abstract ideal'.[67] In this way, the festival 'whole' is greater than the sum of its parts – festivals are sold on something more than simply the music or individual artists. Kendal Calling, for example, has adopted the slogan, 'see you in the fields', while Boomtown Fair invites attendees to 'explore our world'. The festival concept is thus less 'all about the music' than one in which music forms a part of the overall experience.

Most enjoyable aspects of festivals

Survey respondents were asked to select the top four things they enjoy most from their festival experience; Figure 4 shows the average results between 2008-2013 below.

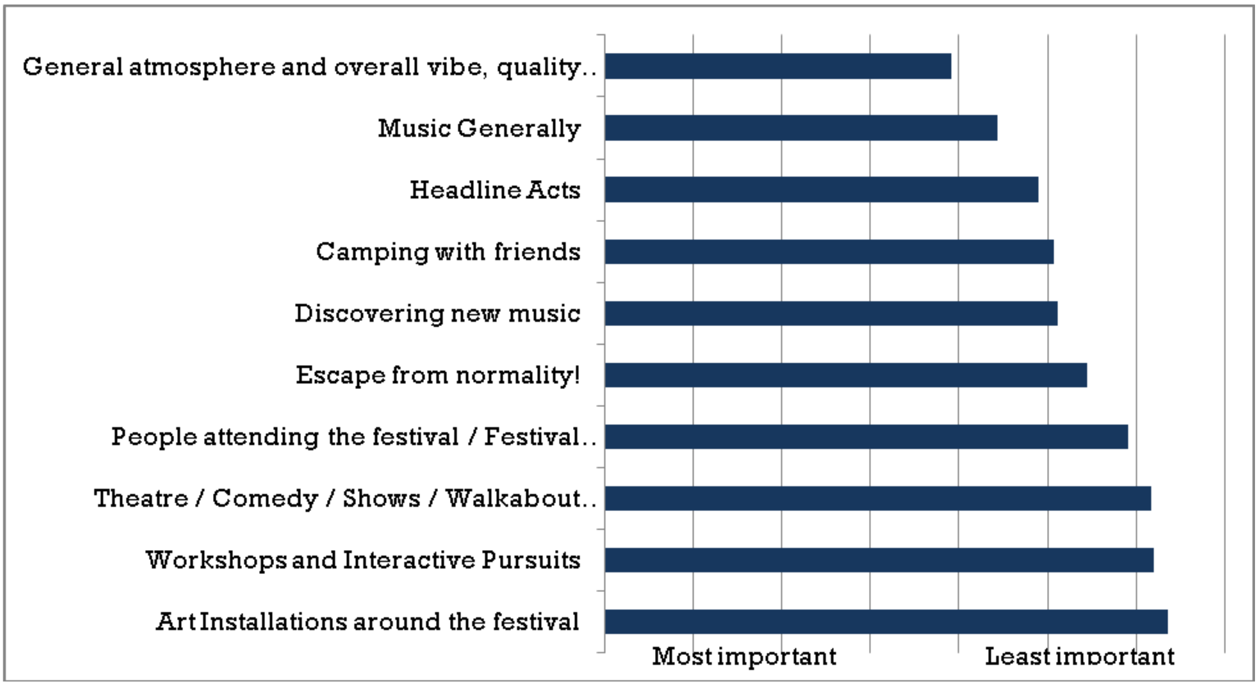

Figure 4: Most enjoyable aspects of festival attendance 2008-2013 average

When asked what the most enjoyable aspects are from their festival experience, the highest rated response was 'General atmosphere and overall vibe, quality and character of event' (average rating of 1.95 where 1 is most important). Illustrating the importance of music at festivals, the next highest rated reason enjoying a festival is 'Music generally' (2.22) followed by

‘Headline acts’ (2.45). Of those who rated ‘General atmosphere’ as the most enjoyable thing about festivals in the 2012 survey, here are some comments about why they love festivals:-

> Atmosphere is key! Festival identity, its style and type of music creates this atmosphere. It attracts certain 'types' of people and I choose my festivals based on this. Freedom to roam around a look after yourself without imposing strict security is essential. I don't want to feel like a criminal on entering but I also want to be kept safe. Sniffer dogs? Xray machines...? Far too much!! Being able to bring your own food and drink... No big sponsors!! Keep things unique... Support the little guys, the up and coming and the old skool favourites :-))
>
> Festivals are as good as holidays to me because they offer you even more escape (though perhaps not as much relaxation). I much prefer smaller festivals than large ones as I don't like having to trek for ages across the site between stages and it's easier not to lose your friends. Thanks!
>
> I enjoy independent festivals. Especially the smaller ones where I can stay up all night, the food is good quality, inexpensive and not mainly bits of dead animals. I like to see genuinely new music and to meet new and unusual people. My own age group are generally dull and I have decided to not go into old age in a dignified manner. ‘You're a long time dead’

For those who rated ‘Headline acts’ and ‘Music generally’ as the top rated enjoyable factor at a festival, here are some comments about their choices:-

> Having early promotional information about the artists with hyperlinks to their music is helpful. It is nice to be able to spend some time getting to know new musicians in advance of the show. Also play lists like Spotify of all the artists in the show are great.
>
> I really enjoy smaller festivals, where the emphasis is on the music and art/film/performances and you don't feel like a cash-cow for some large corporate sponsor.
>
> Music is my life and festivals help spice it up!

At the opposite end of the scale, ‘Workshops and Interactive Pursuits’ and ‘Art Installations around the festival’ are rated as the least important enjoyable things about a festival on average. Before you cancel them all, however, these most likely could fall within the ‘General atmosphere’ category, and this also correlates with the 53.2% who list ‘The general atmosphere and overall vibe, character and quality of the event’ as the motivating factor for attending a festival in the first place.

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In essence, it is difficult - if not impossible – to separate a festival into its constituent parts and to pinpoint one festival factor over another. As mentioned above, the survey shows that the majority of people like festivals for the variety on offer rather than for one particular aspect, although music still plays a key role in both why people go and what they enjoy when they get there.

Examining trends over the six years of the festival survey, there has been a small increase in the importance of discovering new music and workshops/interactive pursuits, and a small decrease in the importance of theatre/comedy/shows/walkabout performances/etc. and of the general atmosphere and overall vibe, quality and character of event.

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Spending habits

The survey showed that, between 2008 and 2013, festival-goers spent between an average of £365 (2009) and £435 (2011) per festival, with the **average total spend over six years being £395 per person.**

Spending on festivals appears to be steady, based on finding the average of the year-on-year percentage change over the six years of the AIF survey. **Spending has risen by 3% per year on average which is in line with inflation** – adjusted for inflation, the average rise in spending per year has been 0.1%.

Multiplying the total ticket sales per year from AIF's capacity data for its members (assuming all festivals sold out), and the average spend each year from the AIF survey, **it is estimated that the total spend by AIF member festival attendees between 2010 and 2013 was around £795,300,000.**[xvi]

Taking an estimated average spend between 2010 and 2014 of £409 and multiplying this figure by the total potential ticket sales of AIF member festivals in 2014 (assuming all festivals sold out), added to the estimated total for 2010-2013 above, **the spend by AIF member festival-goers for the past five years (2010 to 2014) is estimated to be approximately £1.01 billion.**

As can be seen in Figure 5 below, the highest average spend over six years has been on entertainment (including tickets) at an average of £149 per festival. The next highest average spend is on food & drink on site (including alcohol) at £88, with the third highest spend on travel at £52.

[xvi] It should be pointed out that total spend figures are based on 11,350 AIF survey responses to the question about audience spend, which forms 0.5% of the total potential population of the potential AIF festival-going audience between 2010 and 2013, i.e. nearly 2.5 million potential festival-goers. This compares to 2693 respondents to the Festival Awards 2010 survey carried out by Virtual Festivals from 155,000+ opt-in email subscribers, representing approximately 1.7% of their subscriber base, therefore the AIF survey return rate is in line with the Festival Awards survey.

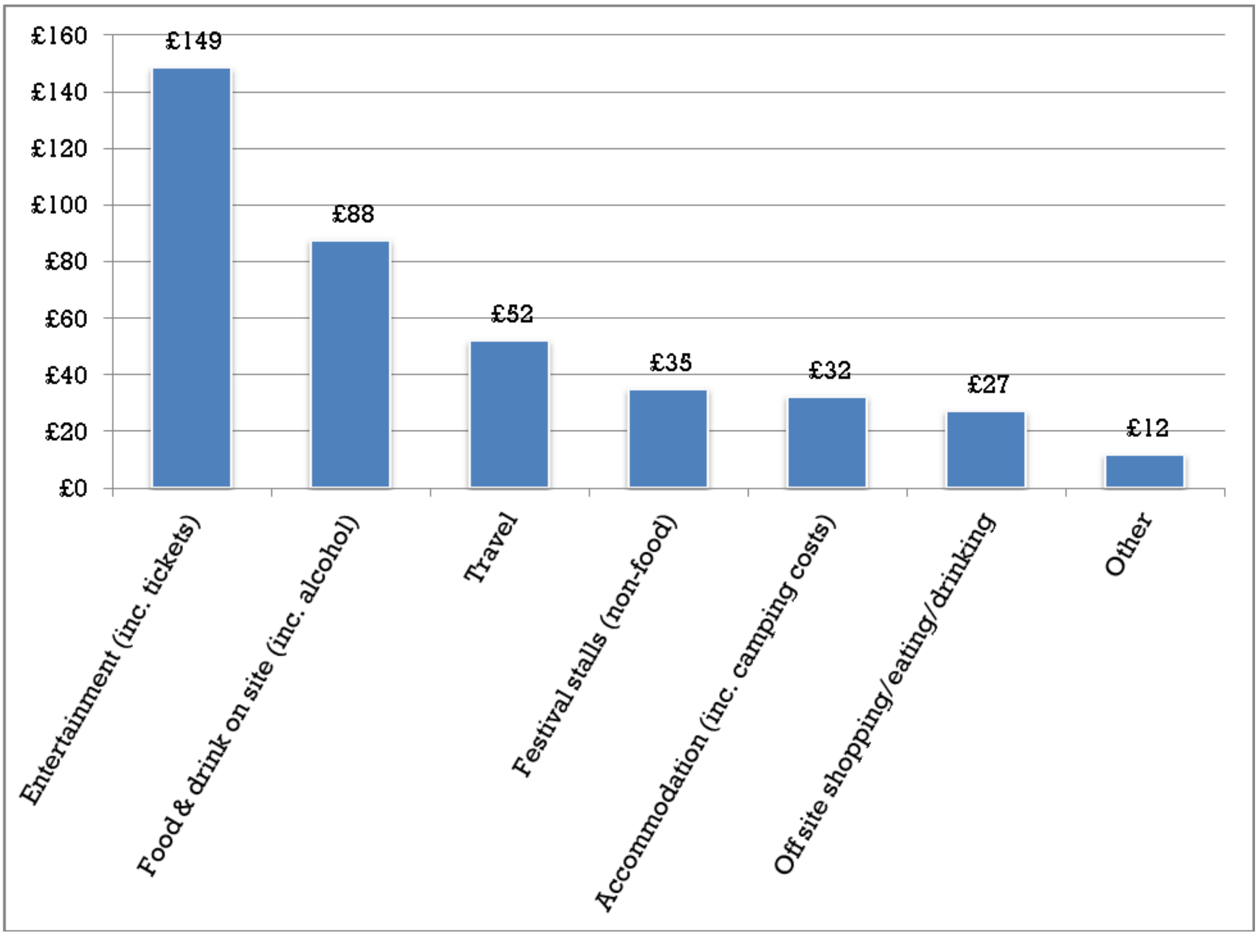

Figure 5: Average spend 2008-2013

Effects of the recession

2009 saw the lowest average spend since the AIF survey began, directly after the financial crisis which began in 2008, showing just how vulnerable festivals are to the vagaries of the global economy. Indeed, since 2008, 47% festival-goers on average claimed to have been affected by the recession in some way, although the number of respondents claiming that the recession has affected their spending habits at the festival has decreased steadily since 2011.

Changes to spending habits over time

There are some interesting changes to note to festival-goers' spending habits over time between 2008 and 2013:-

- They are **more likely to spend time in the local area** before, during, and after the festival;
- They are **more likely to spend more on food and drink** and on other stalls;
- They are now **less likely to share tents** with friends;
- There has been an average **increase of 10% year-on-year** in the amount of money spent on **accommodation** costs (including camping);
- Spending on **food and drink** on site (including alcohol) has **increased on average by 8%** since the survey was first undertaken;
- Spend on **entertainment** (including tickets) has **increased on average by 13%;**

- Spending on **festival stalls** (non-food) has **fallen on average by 12%;**
- Spending on travel has **fallen on average by 3%.**

Changes in ticket price over time

Examining ticket prices for a number of UK festivals, including some AIF members, shows that, on average, **ticket prices have risen on average by 6.3% per year since 2008.**[xvii] The chart in Figure 6 below shows the average ticket increase compared to the Consumer Price Index since 2002, showing how festival ticket prices have risen well above inflation. It should also be pointed out that artist fees have also increased during this period, however; Festival Republic's Melvin Benn, for example, estimated that the rise in headliner fee between 2004 and 2014 is 400%.[68]

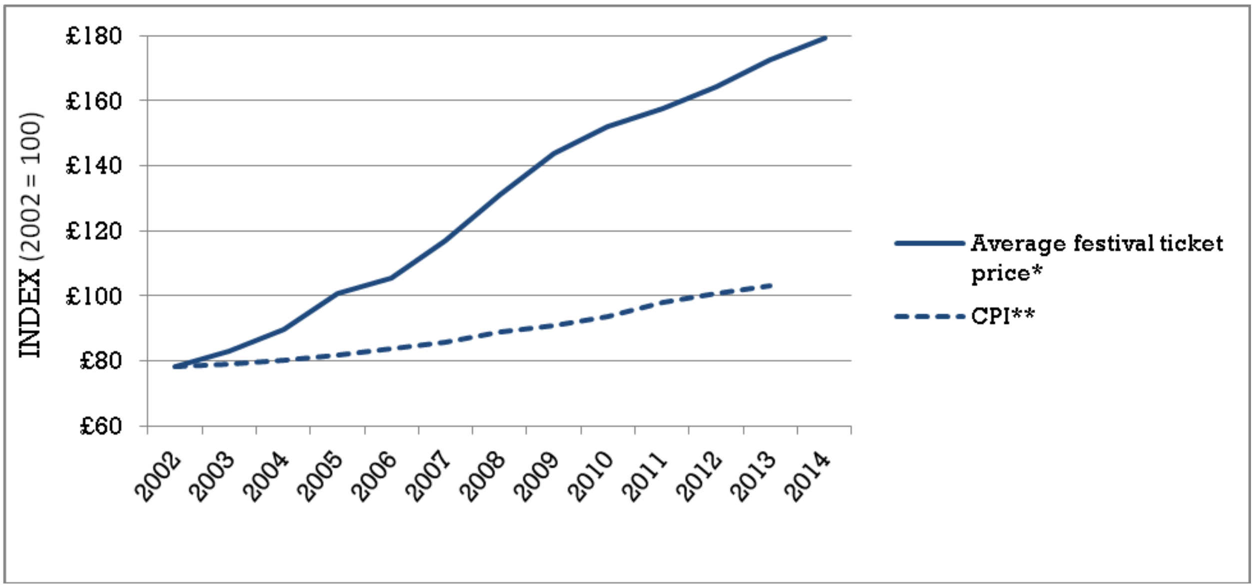

Figure 6: Average ticket price of major UK festivals 2002-2014 compared to CPI. * Adult ticket prices include standard camping but excl. booking fee. ** CPI data only available until 2013.

Local spend

Based on six years' worth of data, the **average amount of money spent in the local area per person was £30.77**. Multiplying the total ticket sales per year from AIF's capacity data for its members (assuming all festivals sold out), and the average local spend each year from the AIF survey, the **total spend in the local area between 2010 and 2013 was c. £60,300,000.** Including the estimated average spend for 2014 gives an estimated total figure of **£77,100,000 spent in the local area by AIF member festival-goers over the past five years (2010-2014).**

The vast majority of survey respondents stay in the local area for three to four days (72.6% in 2013) with 18.1% staying for five or more days.

A 2007 report by Mendip District Council revealed that Glastonbury Festival impacts on the worldwide economy to the tune of more than £73 million per year.[69] The Mendip Council granted

[xvii] Data from the following festivals: Glastonbury, Download, V Festival Hylands Park, Isle of Wight Festival, Reading Festival, Leeds Festival, Bestival, Creamfields, T in the Park, Sonisphere, V Festival Weston Park, Global Gathering, Hard Rock, Rock Ness, Lovebox, Big Chill, Womad, Latitude

Glastonbury Festival a ten year licence in 2014 following a tumultuous number of years,[70] therefore it could be that the economic case for the festival sector is now winning.

Cultural and social value

It should not all be about the numbers, however – as can clearly be seen from the comments from survey respondents within this report, festivals are much more than simply about economic value.[71] The cultural and social value of festivals is much more difficult to measure but includes:-

- Catharsis
- An escape from reality
- A release from the everyday
- The chance to meet new friends and cement existing friendships
- Getting back to nature
- Participation and being part of the spectacle
- A chance to experiment with utopia, albeit only fleetingly

As festival expert George McKay puts it, ‘Festival or carnival traditionally inverts social hierarchy, turns the world upside down. In that special fluid state, social experimentation can occur’.[72]

Transport and Travelling

The most popular way to travel to festivals on average (for the longest part of the journey) is with three or more people in a car (42.7%). The overall average percentage of people travelling by car is 65.2% over the six years of the AIF survey. Even after car sharing initiatives run by goCarShare and by festivals such as Glastonbury[73] and Bestival,[74] however, there has been a significant increase in the average **number of people travelling by car with two people or fewer experiencing a 13.1% rise**, based on finding the average of the year-on-year percentage change over the six years of the AIF survey. Vans and campervans have also become more popular, with an average increase of 11.2% choosing this option since 2008.

High car use in 2012 was also affected by the poor weather: the following chart shows that there is some correlation between heavy rainfall and higher car use, but also that car usage appear to be on the increase in general, even with lower rainfall. Higher car use is most likely as a result of a generally more positive economic situation and a levelling of fuel prices.

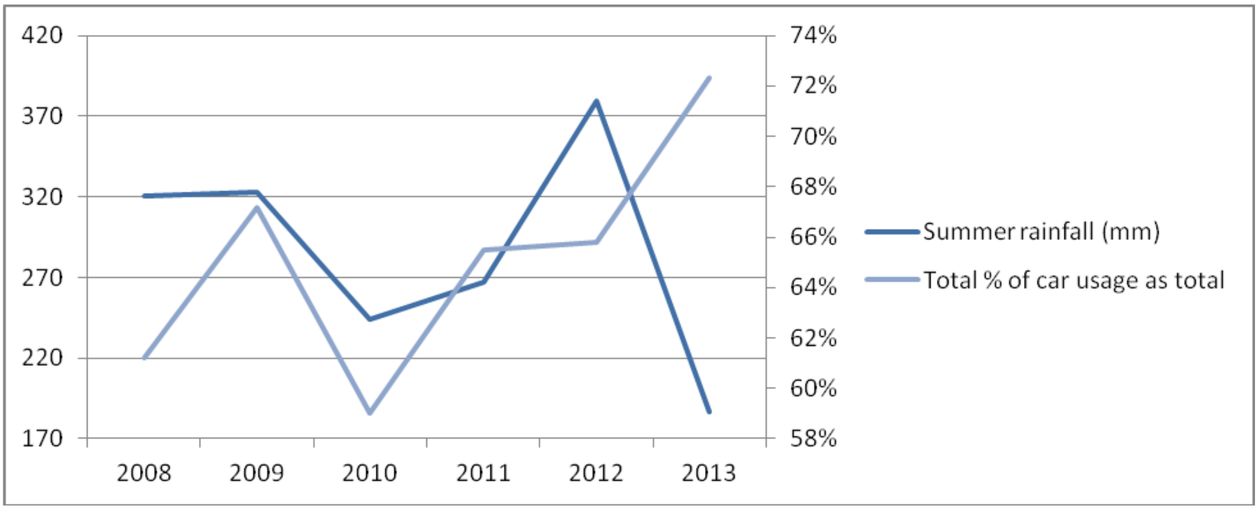

Figure 7: Chart showing annual summer rainfall against total % of car usage as total. Source of rainfall data: Met Office.[75]

Between 2009 and 2011, the **average spent on fuel by survey respondents was £40.58**. The amount spent on fuel has risen (unsurprisingly) and will no doubt continue to rise in the future. Fuel prices appear to stop rising between 2012 and 2014, however, as can be seen in Figure 8, which could explain the increased use of private cars and the decreased use of public transport.

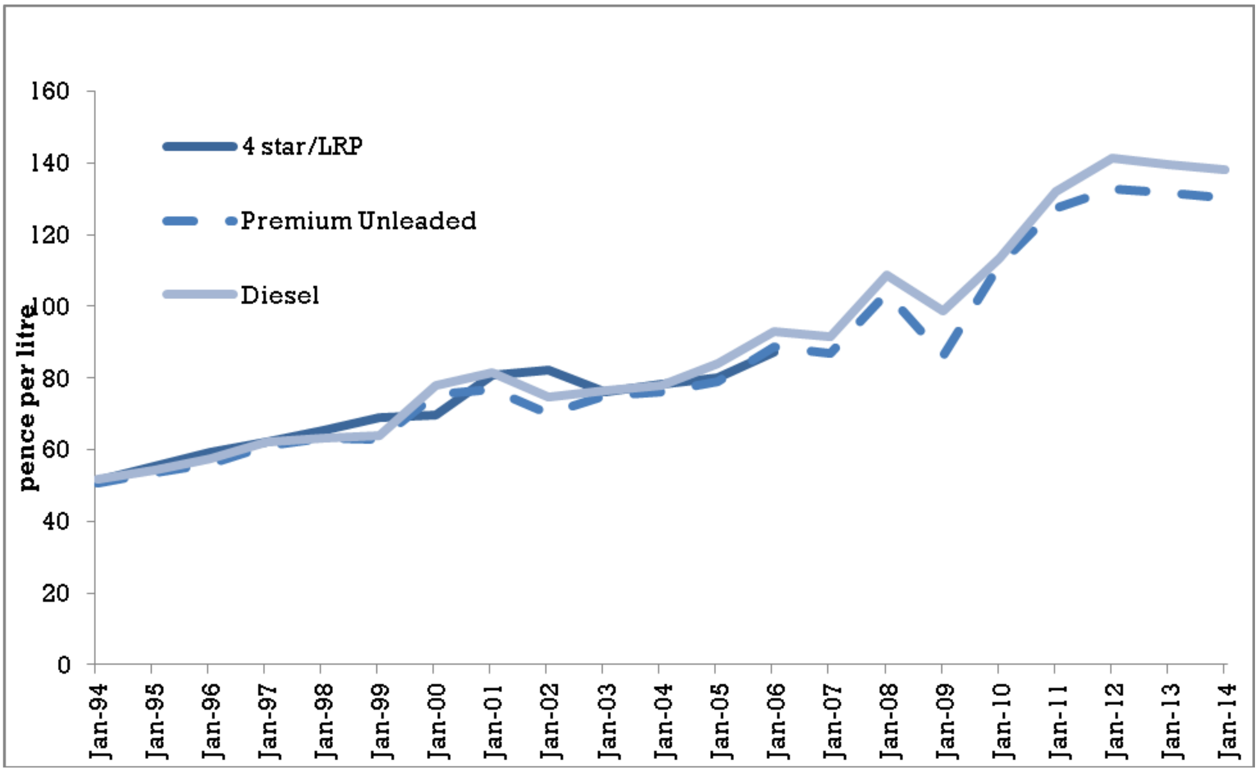

Figure 8: Chart of Motor Spirit Prices in January from 1994 to 2014[76]

Public transport

Since 2008, the average number of survey respondents opting to travel by public transport appears to have decreased, as shown below in Figure 9.

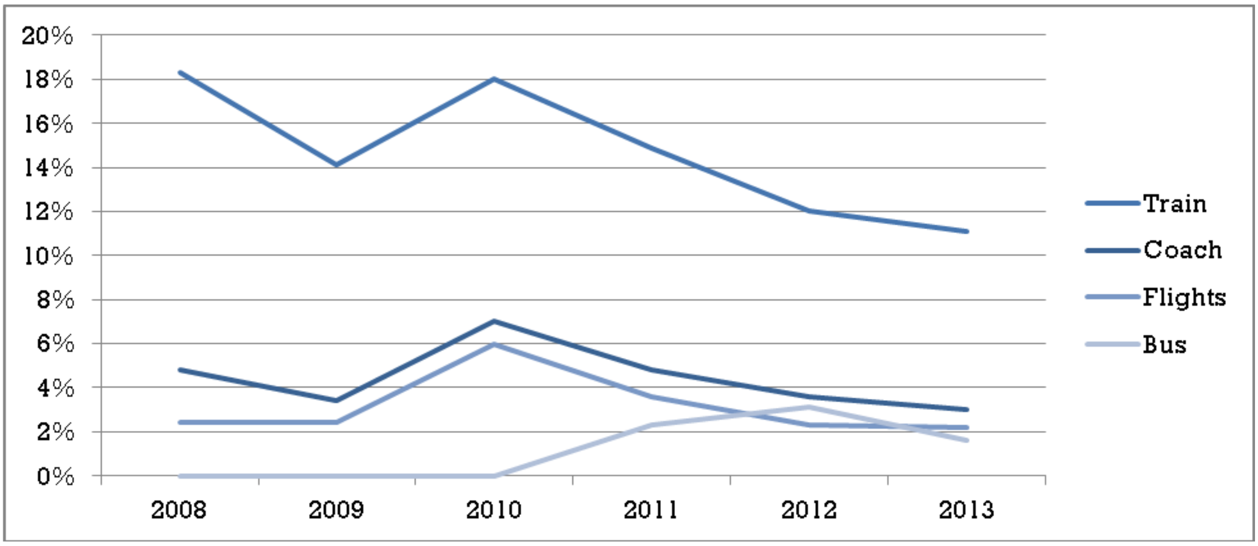

Figure 9: Percentage of survey respondents travelling by public transport

An overall average of **7.9% fewer festival-goers travelled by train** and an average 2.7% fewer travelled by bus over the six years of the survey. It has been claimed by the TUC that average train fares have risen nearly three times faster than average incomes since 2008,[77] which could be one factor in this disappointing decrease. It should also be pointed out that many of the AIF member festivals are in rural locations and therefore difficult to access via public transport.[78]

There has been an **average 13.9% increase in the number of people flying to festivals** although it is unclear from the survey data as to whether this is to festivals within the UK or whether it is to festivals abroad.

These statistics, coupled with the increase in private transport and decrease in public transport, perhaps suggests that the environmental impact of festivals appears to be increasing.

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Incentives to use public transport

As can be seen below in Figure 10, when asked which two incentives would encourage survey respondents to travel by public transport instead of car, the most popular choice on average is a **discount on a public transport ticket** (48.4%). The second most popular incentive on average is **fast track entry / queuing** (30.7%), and the third most popular incentive was **preferential treatment for camping sites** (23.3%). A stubborn 19.8% of festival-goers cannot be persuaded to part from their cars, however (or didn't like any of the above options).

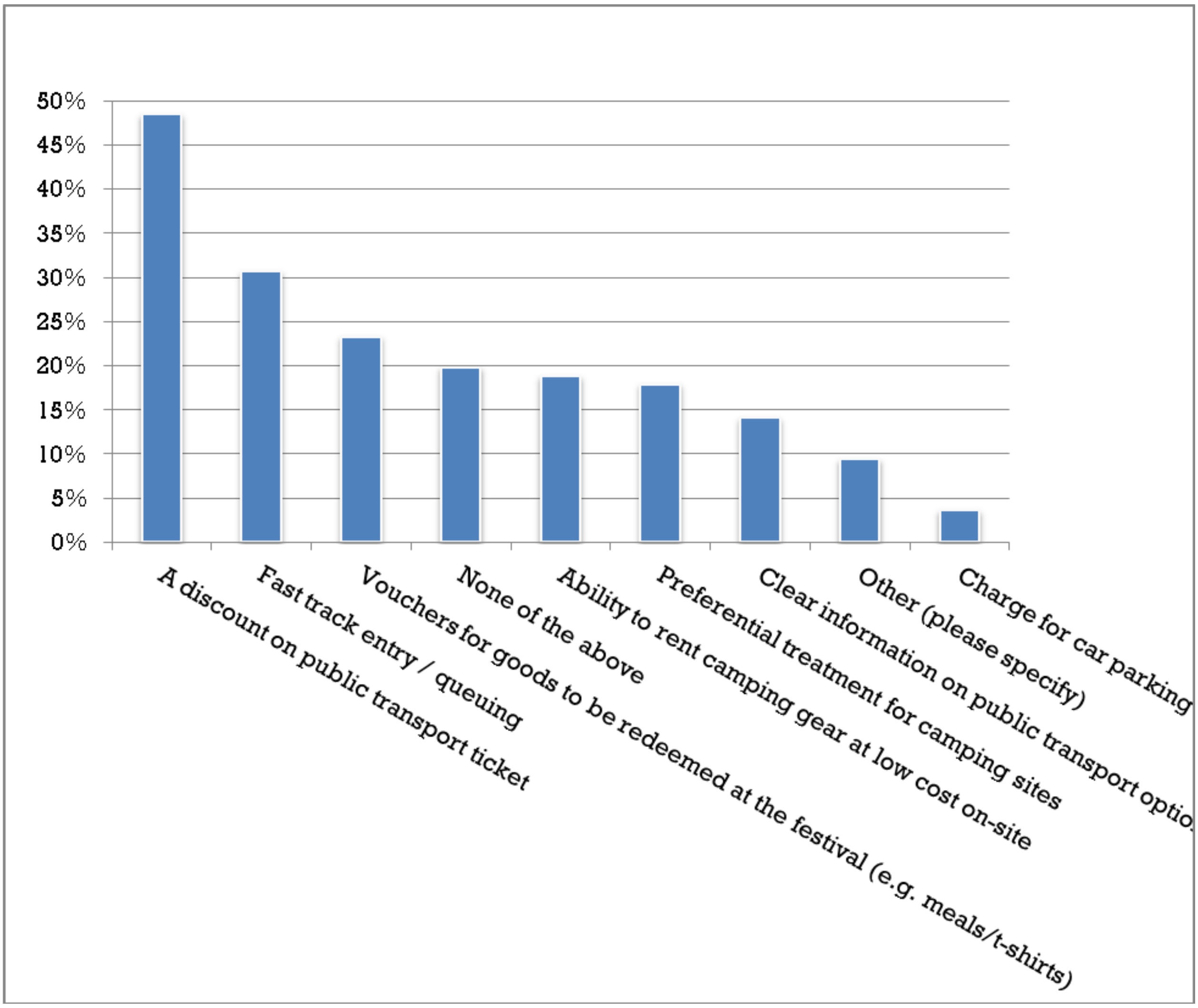

Figure 10: Average of which two incentives would encourage respondents to travel by public transport instead of by car, 2008-2013

The importance of cost on transport choice

An average of 69% of survey respondents answered 'somewhat highly', 'highly', or 'very highly' when asked how importantly cost factors in their choice of transport to the festival. Until fuel costs rise again, it is perhaps likely that public transport usage will not be as popular as car travel.

Sleeping

As can be seen in Figure 11, over the six years of the survey, camping in a tent on-site is very much the most popular form of accommodation, with an average of 80.3% of festival-goers sleeping in a tent. The next most popular option is to sleep at home (average 8.1%). The third most popular is to sleep in a campervan (5.9%), a figure that has increased by 14% over the past six years, in line with the findings above about how people travel to festivals.

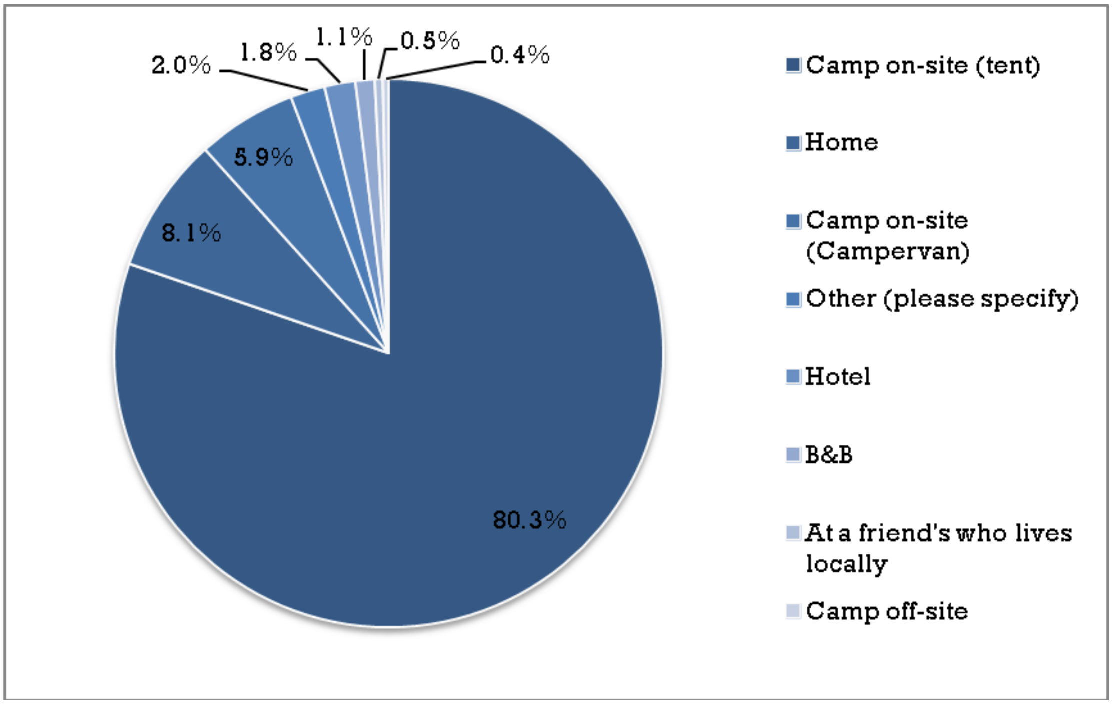

Figure 11: Average of where survey respondents sleep whilst visiting the festival 2008-2013

The number of respondents camping in a tent on-site has varied between 67% and 88% over the past six years. **The average percentage of respondents staying on-site between 2008 and 2013 is 86%.**

Sleeping and weather

As to be expected, the weather makes an impact on people's choice of where to sleep whilst visiting the festival: perhaps unsurprisingly, there is a direct correlation between heavy summer rainfall and fewer people choosing to camp, as can be seen in Figure 12 below (the lower the rainfall, the more people camp on-site):-

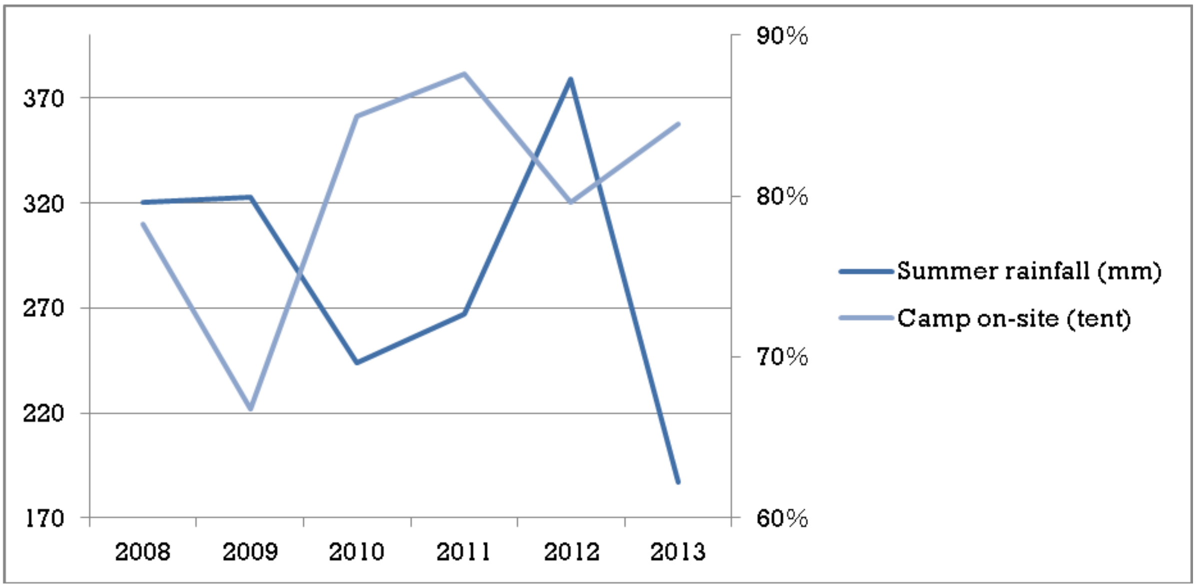

Figure 12: Correlation between summer rainfall and people choosing to camp on-site (tent)

Changes in sleeping choices

Over the six years of the AIF survey, there appears to have a significant increase in people sleeping in campervans (14.1%), a small increase in people staying at home (9.3%) and a smaller increase in those sleeping in a tent (2.5%), perhaps offset by a decrease of 11% in the average number of people staying in a hotel.

As shown in Figure 13, there appears to be an equal and opposite correlation between those choosing to stay at home rather than at a tent, i.e. the decision appears to be between a tent and staying at home.

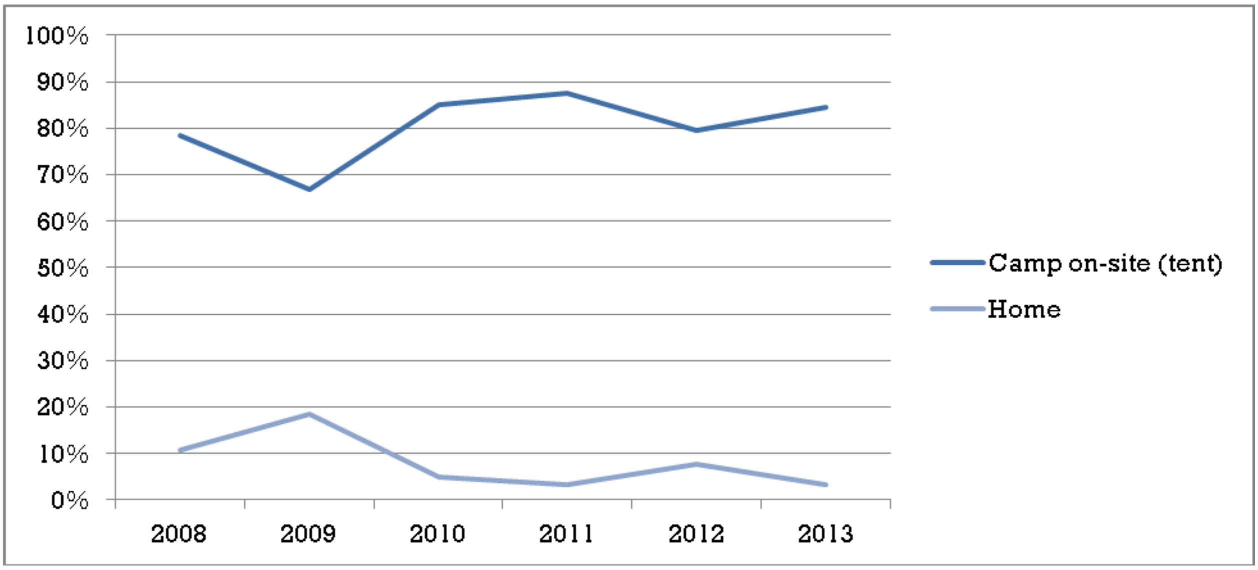

Figure 13: Comparison of tent vs home

Leaving tents at festivals

Leaving tents and other camping equipment at festivals is a problem which appears to be getting worse and the problem is exacerbated by cheap deals on camping gear being offered by a number of supermarkets and other retailers. There were many column inches dedicated to the mess left by the 175,000 festival-goers at 2014's Glastonbury,[79] but while it is interesting to learn about the army of volunteers who get Worthy Farm back to its original state – and good to know that the promoters take recycling seriously – multiple stories about Glastonbury's rubbish mountain could backfire, in the sense that it could lead people to think that leaving rubbish behind is acceptable behaviour as someone will clear up after them.[xviii] In the author's experience, festivals like Shambala and Truck have usually been relatively litter-free, and it is an interesting question as to whether the smaller the festival and the more closely connected the festival-goers to the location and to the crew and the stewards, the less likely they will be to drop litter and leave tents. Perhaps the people attracted to Anderton's 'non-corporate, ethically minded, environmentally friendly' festivals are less inclined to drop litter in the first place.

[xviii] It is interesting to note that Michael Eavis was reported In 2008 as saying that, "Last year I thought I genuinely can't do this anymore. All the tents were left behind and the site was a mess," after the cost of clearing up 30,000 tents and 180,000 tent pegs was £800k. BBC (2008) Eavis 'nearly quit' Glastonbury. *BBC* website, 25 June. Available from: <http://news.bbc.co.uk/1/hi/england/somerset/7473344.stm> Accessed 27 August 2014.

The good news is that 85% of the festival-goers surveyed in 2013 said that they took their tent home. However, the bad news is that out of those who camp, nearly 7% of survey respondents admitted to leaving their tent behind in 2013, either because it was broken (the most popular excuse), because they couldn't bear to carry it, because it was cheap and they could get another one, or because they lost it. Multiply this by the total number of AIF festival-goers in 2013 and that leaves an estimated **18,000 tents left behind by AIF member festival-goers**,[80] or nearly **54 metric tonnes of tent-related rubbish** potentially sent to landfill in 2013.[81]

To counter the increase in tent litter, the Love Your Tent initiative began in 2011 at the Isle of Wight festival and has since spread to other festivals, including AIF members Nozstock, Kendal Calling, Shambala, Brownstock and Truck.[82] As campaigners say:-

> If it doesn't make financial sense to the organisers having to pay contractors to collect it, and then pay landfill charges on top of that, then it can't make much sense to the punters either, buying a new tent and all the associated equipment every time they go to another festival. And it makes no sense to the environment.[83]

Love Your Tent aims to educate festival-goers and festival promoters by showing them how much waste there is and how much it costs them each year. The message is simple: Love Your Tent and take it home.

Information gathering

Official festival website

According to survey data between 2008 and 2013, the **official festival website** is consistently the most popular source of information for festival-goers, with an average of two thirds of survey respondents citing this as the means by which they inform themselves about forthcoming events (66.2%). The second most popular is 'word of mouth' at 51.3% followed by 'social networking sites' (50.1%). Interestingly, 48% of survey respondents admitted that they had not seen any adverts, flyers or posters for their chosen festival.

It should be borne in mind that it is notoriously difficult to pinpoint exactly which part of the 'marketing mix' is the trigger which leads to ticket purchase. Many promoters quite rightly therefore rely on a number of different means of promotion in order to attempt to reach their target audience.

Social networking

The use of **social networking** sites as a means of finding information has, perhaps unsurprisingly, increased since the start of the AIF annual survey, from 34% of festival-goers using social networking sites to inform themselves about forthcoming events in 2008 compared to 62% in 2013, an increase of 81% over six years. It is worth noting that in the period 2008 to 2012, Facebook has increased its users from 58 million global users in December 2007 to 1.28 billion monthly active users in March 2014.[84] Similarly, Twitter, which was established in 2006, claimed to have 200,000 active users per week in March 2008,[85] and by 2014, claims 255 million monthly active users.[86] It is worth mentioning that social media is not necessarily the panacea it first appeared to be; as mentioned earlier in this report, Facebook's 'dial down' means that each Facebook post reaches half the number of people 'liking' a page than it used to.

Festival community websites

Festival community websites such as Virtual Festivals and eFestivals are also popular, with an average of 42% of respondents citing them as one means by which they inform themselves about forthcoming events. Continued investment in festivals' own websites appears to be a sensible option, however, as it allows promoters to retain control over their message rather than being dependent on a third party.

Word of mouth

Returning to the somewhat elusive **'word of mouth'** category briefly, the following quotation by Sonisphere's Stuart Galbraith also highlights the potential for technology to change the means by which festival promoters are able to communicate with their audiences:-

> There's already technologies now – softwares – coming in that we're running beta trials with, where as soon as I get you to engage with me on Facebook – and you opt in – I can then data mine your network ... We've promoted shows for thirty years and we do market research when we launch a show and 'this TV show produced this' and 'this newspaper ad ...' And at the top of that list, *every* single time, is 'heard it from a friend'. So for the first time in *thirty* years we're actually going to know who those friends are ... It's scary on the one hand, *but* it's also equally enormously exciting because it means that I don't *have* to do the broadcast market, I don't have to take a radio advertising campaign, don't have to do a *broad*cast; I can *narrow*cast and I can actually send it to people that I *know* are already going to be interested in it.[87]

While large-scale festival promoters such as Festival Republic and AEG Live are almost certainly investing in such technologies, it was apparent from the Festival Awards 2012 conference that smaller festivals such as 2000Trees rely more on the **personal touch** to stay in contact with their audiences, albeit still using third-party software such as Facebook.

Print media

The newspaper and magazine sector continues to suffer, with NME's print sales falling more than a quarter to fewer than 15,000 in the first half of 2014.[88] Nevertheless, the number of festival-goers using **print media** to find out about forthcoming events is still relatively high, with an average of 31.6% using magazines and newspapers to inform themselves about forthcoming events, although falling from 37.8% in 2008 to 26.9% in 2013.

Another significant decrease between 2008 and 2013 has been survey respondents' subscription to individual festival eflyers as a means of finding out about forthcoming events, a finding that correlates to the increase in the use of social networking sites. In 2008, 30.9% of respondents stated that eflyers were how they informed themselves about festivals, whereas by 2013, this figure decreased to 17.4%.

In terms of finding information about transport, between 2009 and 2013, an average of **59.8% of festival-goers used the official festival website to find out about travel options.**

Crime

2014 saw the 6th annual national 'Crime at Major UK Music Festivals' conference, an initiative which brings together UK large-scale festival promoters to tackle crime. Part of the reason behind the formation of the Association of Independent Festivals was in order for festival promoters to be able to share information about crime among the Association's members and beyond. Perhaps as result of such initiatives, there are encouraging signs that crime appears to have decreased at a number of UK festivals in 2014, including T in the Park,[89] Download,[90] V Festivals,[91] and Glastonbury,[92] and at AIF member festivals Kendal Calling[93] and Bestival.[94]

It is also gratifying to note that the AIF survey also appears to show an overall decrease in crime between 2012 and 2013, as shown in Figure 14.[xix] Tent theft has decreased from 2.6% to 1.6%, robbery is down from 1.9% to 1.1%, while ticket fraud has decreased from 0.4% to 0.1%. The overall number of respondents experiencing no crime at their festival of choice has increased by nearly 1%.

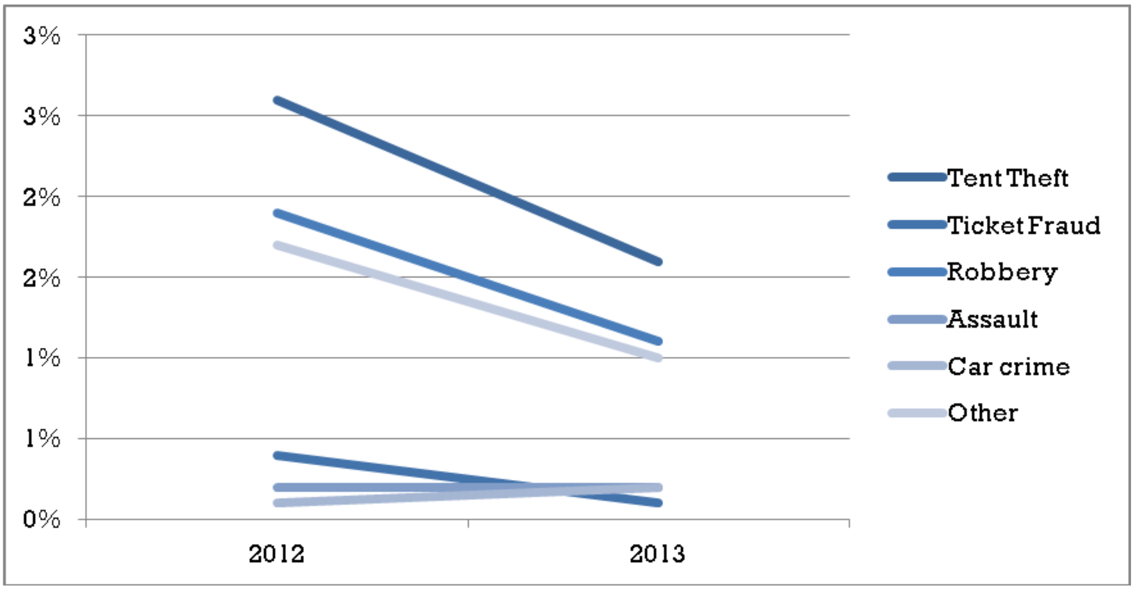

Figure 14: Survey respondents reporting being victims of crime at festivals 2012-2013

Attitudes towards police at festivals

Interestingly, a small majority of survey respondents in 2013 did not think that there should be a police presence on site (54.3%), with the majority claiming that either festival's security was enough on its own (29%) or that they already feel safe at festivals (20%). Comments range from 'I think they should be available but not stop people from having a good time and letting go' to 'Was at Glastonbury in 80s when no police present, and it was pretty lawless. Not in a good way either'. It is a fine balancing act, therefore, to keep festival-goers and their property safe, and for the festival to maintain a relaxed atmosphere with unobtrusive security and police presence.

[xix] It should be pointed out that the phrasing of the question about crime changed slightly in the survey, meaning that data prior to 2012 cannot be compared to more recent responses. The question in years 2008-2011 was phrased 'Have you ever been a victim of crime at a festival?' whereas from 2012 onwards, the question has been phrased as 'Were you a victim of crime at a Festival in 20XX'? The latter question gives a more accurate understanding of the change in crime over time and will be a useful addition to the AIF survey data.

About the survey respondents

Gender

Generally, the gender balance of respondents has been roughly equal between male and female over six years, although with more females than males taking the survey on average: Male 45.5% / Female 54.5%.

Age

The highest proportion of the AIF survey respondents is between the 25-34 age range (32.8%). The next highest group is 17-24 (26.5%), followed by 35-44 (22.7%). **The average age of a survey respondent is 33.**[xx] This is in line with research carried out by MSN (via Gigwise) in 2013 which found that the average age of a festival-goer is 36.[95]

Location of survey respondents

From a total of 19,429 responses, the highest proportion of festival-goers travel from the South East of England (excluding London), at 25.5%. The second highest group of festival-goers travel from the South West of England (14.2%), followed by London (9.2%). Survey respondents were overwhelmingly from the UK and Ireland, with only 3% from Europe and beyond.

Respondents by festival

Since 2008, well over 19,000 survey respondents have taken part in AIF's annual survey. The top three festivals for responses over this period have been as follows: Bestival (18% of total), End of the Road Festival (14%) and Cornbury (8%).

Notes on methodology

The AIF survey started in 2008 and has run every year since then; this report thus draws on data spanning six years of the festival. Survey data for 2014 will not be available until after the report has gone to press therefore survey data is drawn from 2008 to 2013. It should be noted that the AIF relies on its member festivals to disseminate the survey to their own attendees and that some member festivals may be more proactive than others in terms of recruiting survey respondents. Added to this, the membership of the AIF has changed each year and so data comparison between each year's survey is necessarily indicative rather than definitive. It should also be pointed out that accurate data for the music industries in general in the UK (and beyond) is notoriously difficult to obtain. Capacity data has been obtained in the first instance from the Association of Independent Festivals but it should be noted that there are discrepancies in the AIF's own data which means that any figures in this report must be treated as being indicative only. Another related point of interest is that it is often unclear as to whether capacity data refers to the total licensed capacity or merely to public capacity, as a percentage of the total capacity is necessarily given over to cast and crew rather than as saleable tickets.

[xx] It should be pointed out that it is unclear as to whether this is reflective of the average demographic of AIF member festival-goers or simply a measure of the age of festival-goers more likely to take part in the survey.

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