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LIVEANALYTICS

State of play: festivals UK

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PUBLISHED BY:

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Foreword:
demystifying festival trends

The escapist nature of festivals combined with the pull of the music is still a very attractive proposition for festival-goers.

The festival landscape is becoming more crowded, competitive and nuanced, but it is not yet saturated. This is no bad thing for consumers as they too become more selective and eclectic about how they spend their discretionary income – the more choice available, the more competitive the prices and the higher the caliber of line-ups, with more opportunities to see favourite artists and spend a fun weekend with friends.

Festivals provide good value for money (some are just “a quid a band” per person) and the variety of music acts and genres is something that festival-goers welcome (albeit with some cohesion).

The attraction and motivation of attendance varies according to festival, but it’s the love for live entertainment that gets people hooked. Tradition is also a great driver for attending the larger festivals that have built a loyal following and have become an institution in themselves. Conversely, some of the more urban festivals attract more casual attendees, where the music and the social element both play an integral part, though it doesn’t always translate to repeat year-on-year attendance.

As the industry is becoming more commercialised (or more professional), some people are starting to let go of some of the more romanticised perceptions of what festivals should stand for, as they understand the massive operational logistics around setting-up a festival and the difficulties that exist alongside these. Most are therefore happy to accept that sponsors are a necessity and can contribute towards the overall experience. However, festival-goers do not exist in an advertising vacuum and they too have developed sophisticated mechanisms for filtering out irrelevant or out-of-place sponsors, positioning brand fit and added value as a priority.

In a crowded yet fragmented sector, the opportunity to differentiate festivals’ identities lies in targeting different audiences with varying expectations of what a festival should be and who should be performing. A high standard of festival services and facilities is still paramount, despite the overwhelming tolerance of bad weather and uncomfortable camping conditions.

And though the atmosphere and the social aspect of festivals draws people to them, the music itself remains the backbone. With 64% of festival-goers purchasing or downloading music as a result of attending festivals, they also continue to stimulate a cyclical relationship with the recording industry.

The exact science behind the supply and demand equation around festivals is hard to quantify, particularly as external factors are both uncontrollable and unpredictable, but our research shows that the demand is definitely still there.

Executive summary

With the summer festival season fast approaching, we take a look at the nature of music festivals and the profile of festival attendees – the data is based on more than 1000 festival-goers

- Festival attendees are more likely to go to cinema and music gigs than any other form of entertainment
- The key barrier to entry is price (24%) followed by weather risks (14%)
- Average spend on a single festival is £432, from start to finish
    - Most of this budget (24%) goes towards tickets
- More than half (57%) of festival-goers buy or download music after they've been to a festival
- Glastonbury tops the lists of favourite, most known and most attended festival
- Most festival-goers describe the experience as very positive and the majority (40%) attend because they like live entertainment
    - The overall experience is more of a pull than the music in isolation, though people prefer famous line-ups rather than an intimate atmosphere
- Three in five meet new people at festivals
    - Half of festival-goers keep in touch with some of the people they meet at festivals
- Close to half (47%) appreciate sponsoring brands, though most (63%) expect them to add value to the experience
- Only one in three have had sex at a festival, the majority with their partner
    - 81% don't take drugs at festivals
    - 47% consume more than 6 units of alcohol per festival day
- People expect more from hygiene facilities, though they enjoy part of the 'roughing it' aspect of camping

The context

This report sets out to build a 360 degree picture of the festival experience, including the pros and cons, attendance motivations, barriers to entry and the madness.

This study is based on over 1,000 UK festival-goers and includes both a quantitative and qualitative approach (see Methodology for more details).

Barriers to entry

Most ridiculous outfit worn:

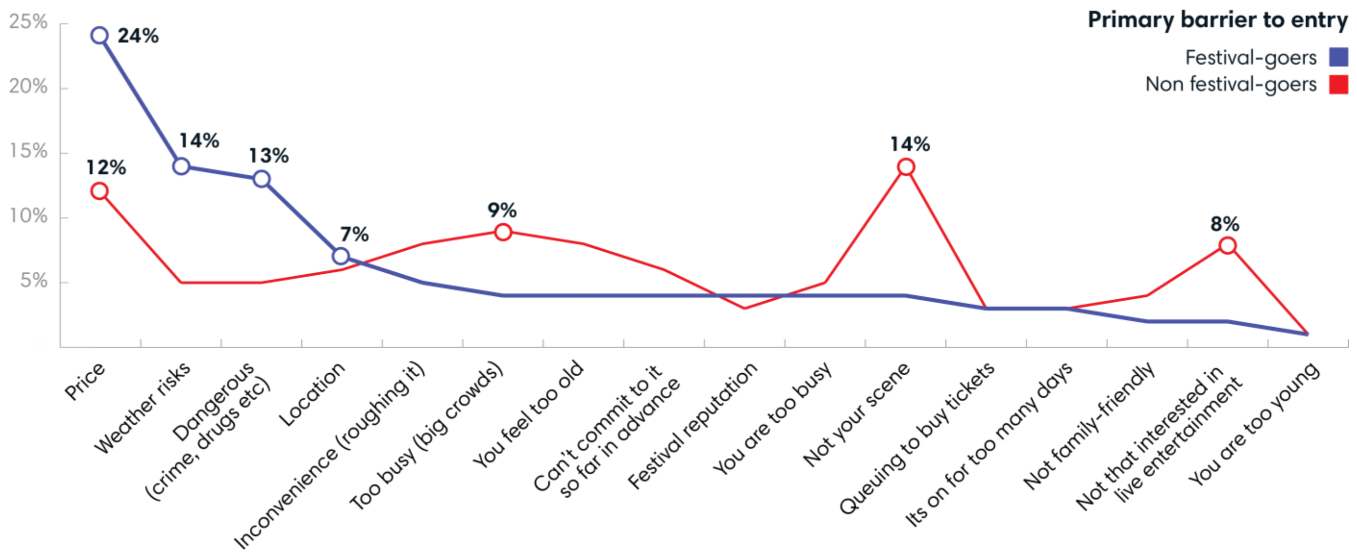
"Flip flops in the rain! Note: Fairy Wings are not ridiculous!"

Craziest behaviour ever seen:

"Mud sliding en mass"

The primary reason why people don't go to festivals (according to those who haven't been to any festival since 2009) is simply lack of interest, with 14% of non-festival-goers citing that it's not their scene – they would be hard to convert into festival-goers. However, another 12% of non-festival-goers suggest that price is their primary barrier to entry, which in turn suggests that the interest is there but the ability to follow through is lacking due to budget restrictions. This is a recurring theme amongst festival-goers too, who also cite price (24%) as the key limitation for attendance.

Weather risks are also detractors, though 'roughing it' doesn't seem to be an issue for most festival-goers. And though just over one in ten perceive festivals as being dangerous, the majority of attendees have never been a victim of crime (see The darker side).



Festival-goers

What is the profile of the average festival-goer and what other events are they interested in?

The majority (a quarter) of festival attendees are 25-34 years old, though they are followed closely by the 35-44 year olds (21%).

Festivals on the whole seem to be slightly more female-oriented (edging with a 5% difference over males), though that varies depending on the festival.

Attendees are mainly from London and the South East, have a Bachelor Degree or equivalent (32%) and are employed full-time (67%) with an annual income of between £20k and £40k.

A large majority have a laptop (85%), a digital camera (70%) and a social media account (53%). More than two in three (68%) have a smartphone (higher than the average population, 42%).[1]

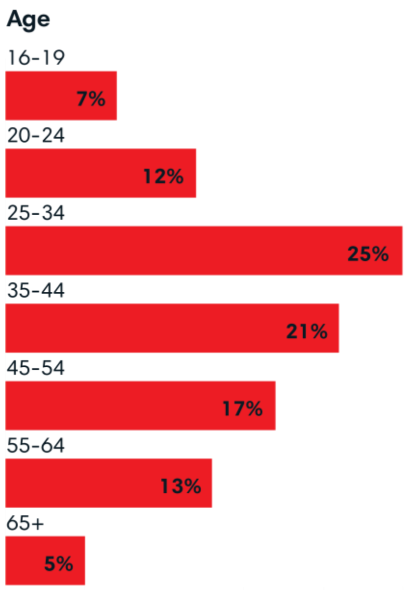
Festival goers are more likely to go to music gigs and least likely to go to comedy and sports events (though our qualitative research suggests that additional non-music related performances in festivals were well received and considered part of the attraction).

Most ridiculous outfit worn:

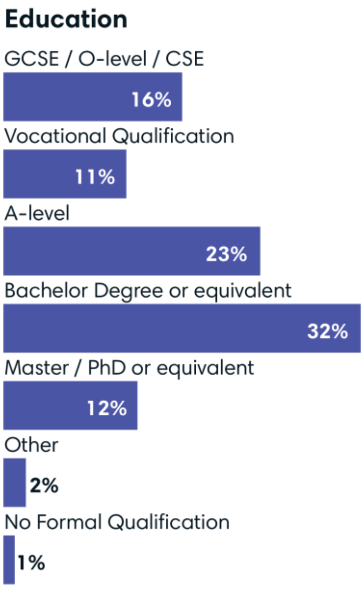
"Lots of fancy dress from a Mrs Incredible costume to an inflatable horse costume"

Craziest behaviour ever seen:

"Getting a tattoo then going straight into the pit...ouch!"



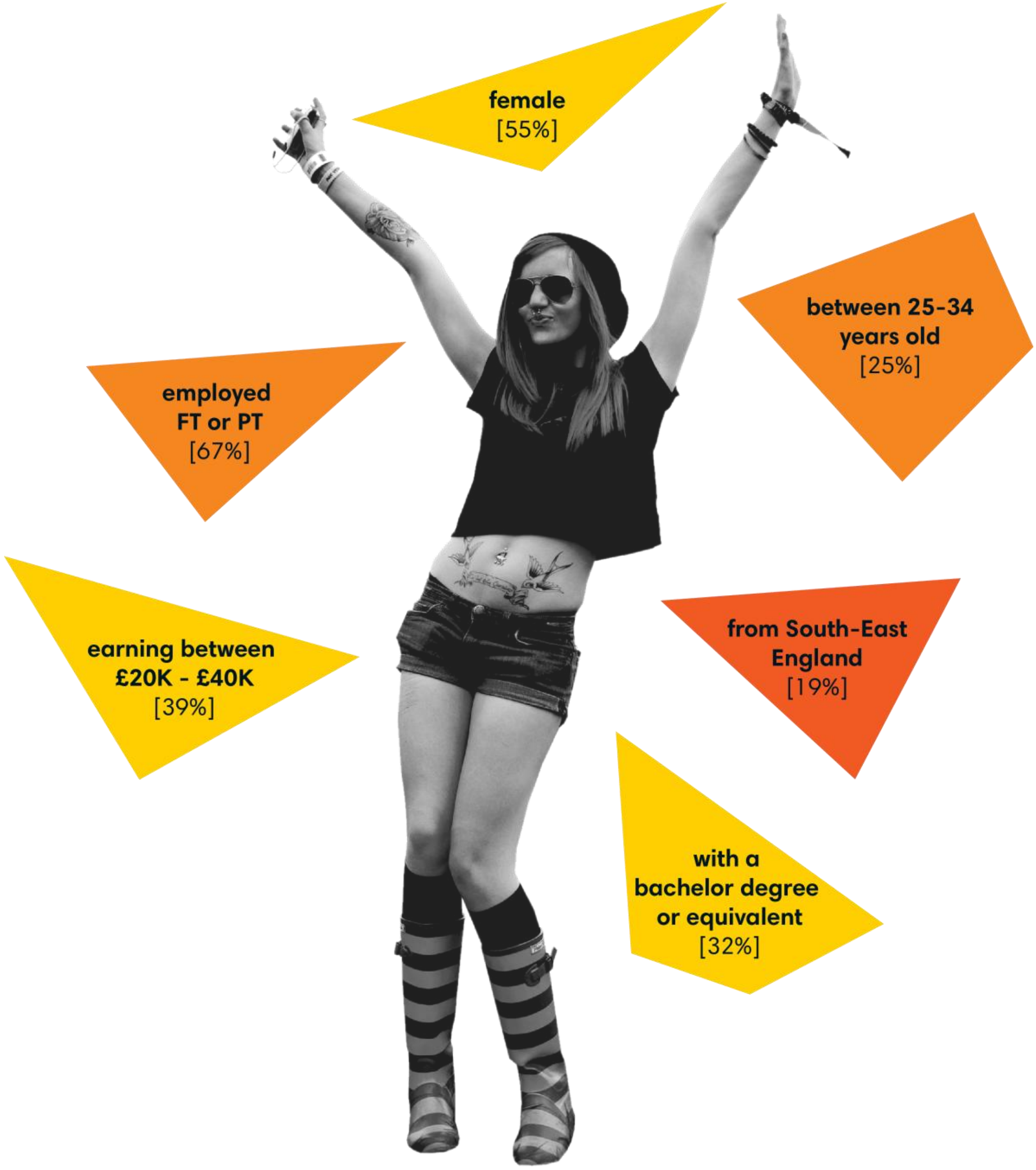
3% of festival bookers[2] were from outside the UK in 2012. Conversely, more than half (55%) of UK festival-goers would consider going abroad to attend a festival in the future and 17% have already done so.



1. Ipsos MORI Technology Tracker, Q1 2012, Ipsos MediaCT.

2. Live Analytics, Aggregated Ticketing Data, Jan 2009 – May 2012 (retrieved June 2012), Ticketmaster UK: Based on 16 major UK festivals for which Ticketmaster/ Live Analytics have ticketing allocations/ data

"I would love to be able to take my own alcohol into the arena. Over 18 bands to actually work and not have to use ID. Firewood would be free because everyone needs a fire. I think more lighting around camp would be good. More toilets. More organised when you come out of headline acts as you can queue for up to 1.5 hours to get out of a headline act"



Future attendance

Most ridiculous outfit worn:

"Psychedelic dungarees I made out of curtains"

Craziest behaviour ever seen:

"Guy dressed as Scooby Doo, rugby tackling a random guy dressed as a giant hot dog"

Research participants were almost unanimous that festivals haven't lost their appeal – they are still very attractive destinations, providing a multi-dimensional and memorable experience (the music, the friends, the freedom). They also seem to provide good value for money, considering how many artists are performing and other events on offer (particularly compared to arena gigs).

The majority of festival-goers have had a positive experience and would like to go again, ***"my sons were talking about last year's festival all year and all they do is ask if we are going again – they would rather go there than have a two week holiday and I would have to say that having a memorable family time is more important to me."***

Despite generally being considered value for money, the cost implications around festivals can be a prohibiting factor. With price the key concern for close to a quarter of festival-goers, they now have to prioritise their spending from a decreasing pool of disposable income, ***"I'm less likely to go to more than one [festival], or I'd spend the money on a hot holiday somewhere instead."***

The run-up

Close to two in five (38%) usually find out about festivals through word of mouth, followed by 17% who get their information through festival websites (the primary source of information for the majority of heavy goers). Traditional media, including TV, radio, newspapers and posters, account for only 12% of knowledge dispersal, though a few participants from our focus group mentioned seeing a live recording of the festival on TV that made them want to be a part of it. Facebook was the primary source information for 7% of festival-goers.

The planning

Most ridiculous outfit worn:

"Union Jack trousers --- I was much younger then…"

Craziest behaviour ever seen:

"Diving into a septic tank [by mistake]"

Most people (more than two in three) plan their festival activities at least two months before the event itself, with 15% deciding they will attend 10-12 months in advance of the festival itself.

However, one in ten leaves the booking till last minute, purchasing tickets up to a week before the event itself. Most attendees (44%) book tickets for themselves and two other people.

More than half (58%) purchase their tickets from a primary ticketing company, though 29% purchase directly through the event promoter. Less than one in ten (8%) buy their tickets from friends, 4% from a secondary (user-to-user) ticketing company and 1% from ticket touts.

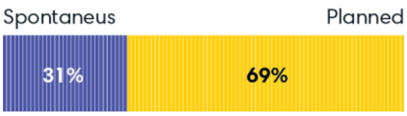
Gauging the reaction towards some measures that could be introduced to make the experience better/ easier, advance booking and loyalty or membership discounts were popular suggestions (65% and 49% respectively). Tickets and virtual wallets on wristbands were favoured over having these available on their smartphones (46% vs. 29%).

On average, people spend around £432 on a single festival experience in its entirety. More than half of this 'budget' goes towards the preparation – this includes the tickets (approximately a quarter of overall spend with an average of £103), camping gear, travel to the destination and drinks/ food purchased in advance.

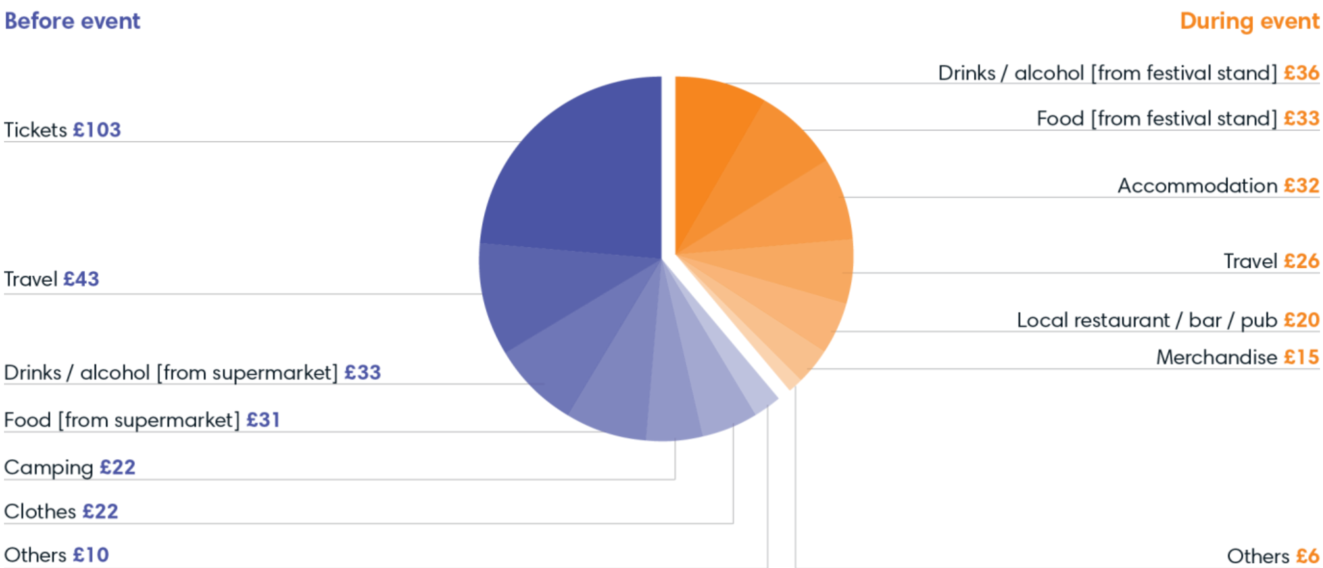
Of the overall budget, 39% is spent during the festival itself, the majority of which goes towards food and beverage from festival stands. But this also includes the costs of food and drinks within local restaurants or pubs and accommodation for those not camping, hence also contributing an average of £52 per person to the local economy – a festival that attracts 50,000 people could therefore bring around £2.6m worth of direct income to the local area.

Just over half (51%) get to the festival through car pool, though 15% drive there alone – a further 12% go by train. Most stay over two nights (38%) and camp at the festival site (50%), though just over one in five don't stay the night and just under one in five stay at a hotel or hostel.

Festival planning



Breakdown of average festival spend



Social media

As with other major social events, people are keen to broadcast their plans and share their thoughts and feelings on various platforms, building up buzz and spreading the word in anticipation of the events themselves. Close to one in three (31%) used Facebook to comment about the festival in advance of the event itself, though fewer people did so on twitter or through a blog (14% and 4% respectively). During the event itself, Facebook again is the most popular platform to publically share parts of the experience, with close to one in four doing so. Broadcasting activity increases twofold after the event itself, with half of festival-goers writing something about the event on Facebook. Similarly, sharing photos and posting videos online is particularly popular after the event (70% and 67% respectively).

Festival attendees clearly want to engage on multiple touch-points and during different stages of the experience – this therefore no longer ends as one leaves the festival site, but instead continues through the various social media platforms which enable people to revisit and relive elements of the experience digitally.

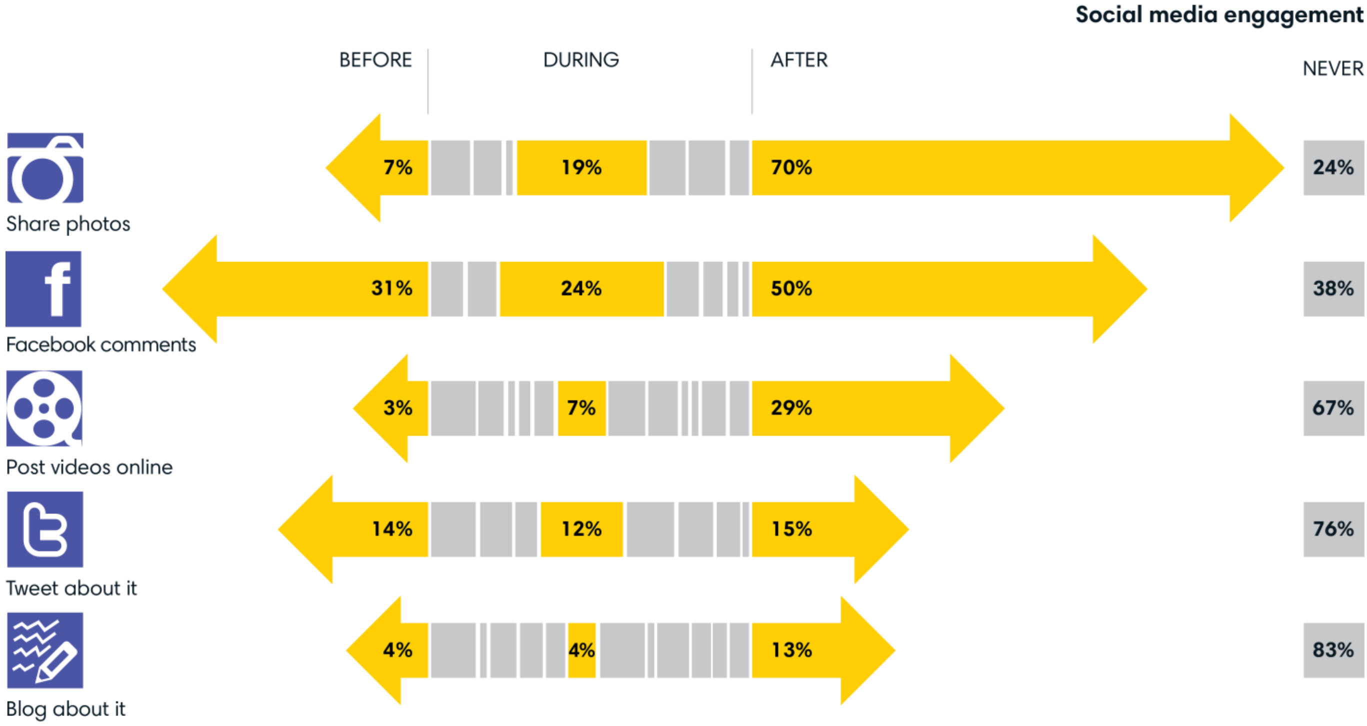
In terms of the music itself, festivals further contribute to the music economy through the cyclical relationship which exists between recorded and live music. Over one in ten start gearing themselves up for the festival by buying or downloading music in advance of the event. And in trying to prolong the experience, 57% of festival-goers buy or download music after the event itself.

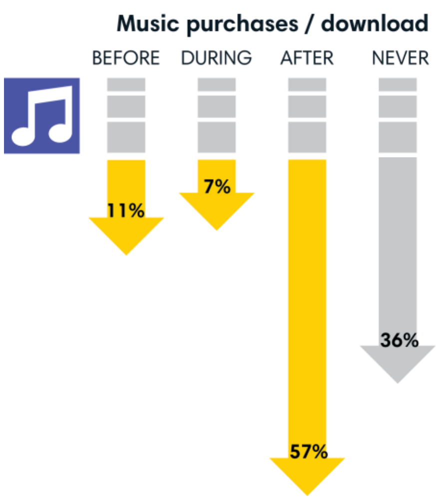
Most ridiculous outfit worn:

"Full pirate's costume"

Craziest behaviour ever seen:

"Shopping trolley races over very dangerous ground"





The music

Festival-goers consider music an integral part of their lives, and many have been exposed to and passionate about it from a young age. Most festival-goers also enjoy going to other kinds of live music events, ranging from intimate and relatively cheap pub gigs to the more elaborate and expensive arena tours.

With such strong connection to music, 81% would pay more than once to see their favourite artist or band perform, though 43% have not yet seen them live.

The very nature of festivals (multi-stage/ multi-act) makes them perfectly placed to accommodate different music tastes and provide variety, something that festival-goers appreciate, ***"it encourages diversity, and exposes you to music you might not otherwise encounter."*** At the same time trying to keep a balance is important, particularly if the genres are too disparate. Though they like some form of cohesion bringing the more generic festivals together, festival-goers also see the value in niche-genre festivals such as Download. But despite the multitude of festivals on offer, there doesn't seem to be a perception that the market is saturated, ***"I like the variety of festivals on offer… the broader the range of festivals the better – more choice, more competition, better for us."***

Festivals

Most ridiculous outfit worn:

"My destroyed tent as a cape and beer boxes for shoes"

Craziest behaviour ever seen:

"Someone dressed up as a cow pretending to eat the grass"

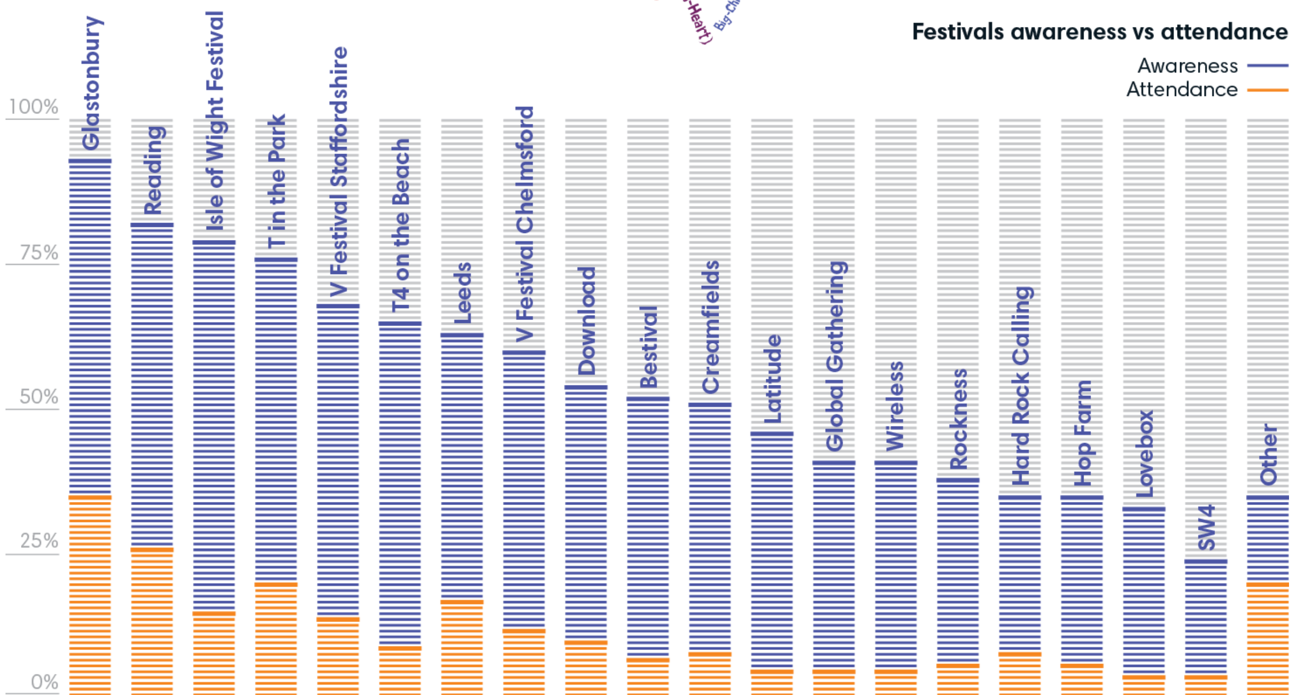
Open-ended responses placed Glastonbury as the preferred festival destination, singled out as the benchmark for all festivals and embodying the ideal festival experience. Reading and V Festival were the second and third most popular festivals, though that doesn't reflect overall awareness and attendance (see below).

Glastonbury (93%), Reading (82%) and Isle of Wight (79%) are the three most well-known festivals. Glastonbury and Reading also boasted the largest conversion rates between awareness and attendance, though more went to T in the Park than Isle of Wight (20% vs. 15%) even though awareness was slightly lower for the former.

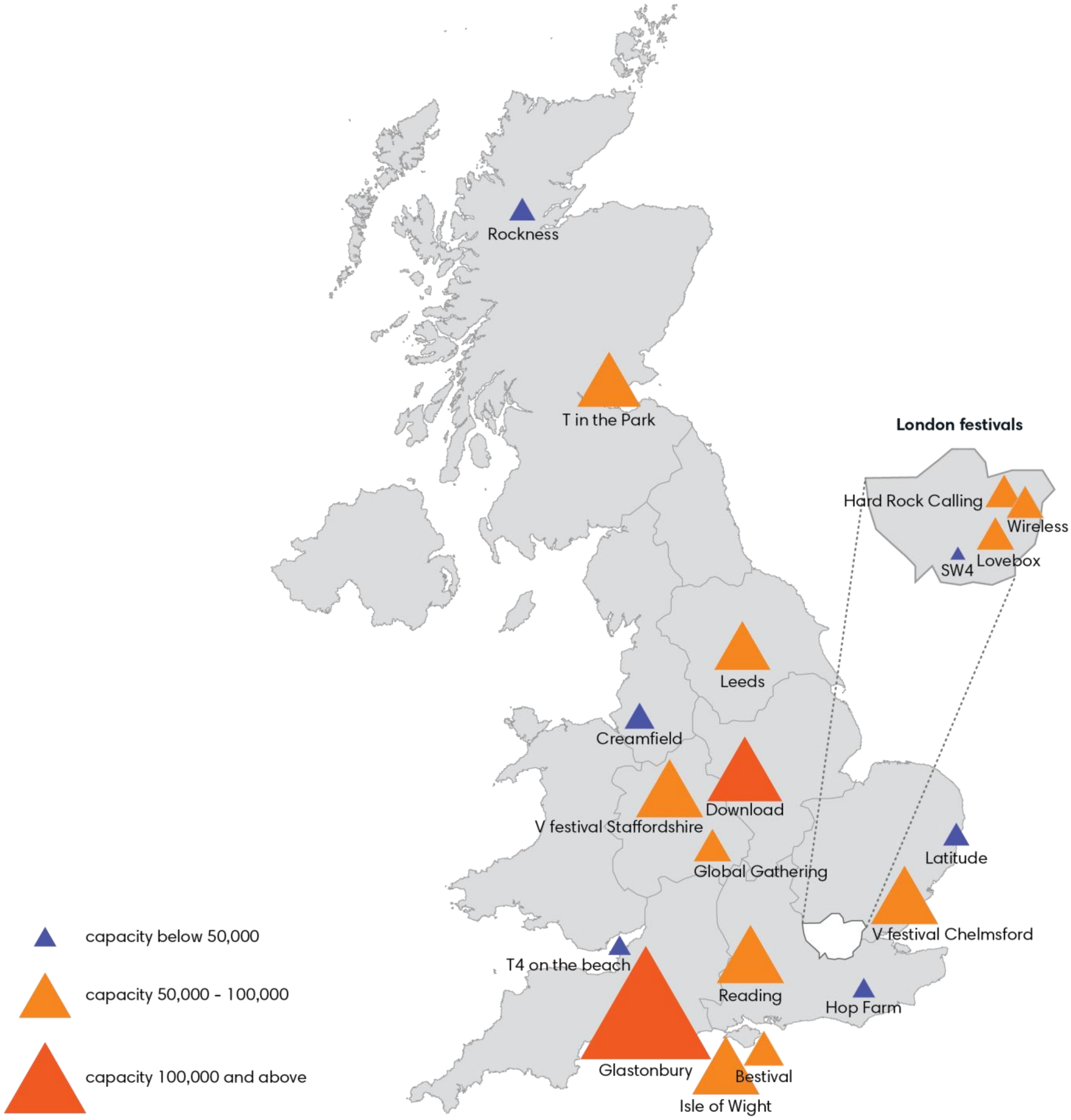
Interestingly, some festivals like Glastonbury are seen as the attraction themselves – regardless of who is headlining and what the rest of the line-up is, the experience is the destination rather than the music. People are therefore prepared to book their tickets without knowing who will be performing and trust that the organisers will continue to deliver and meet expectations. Reputation is therefore very important, with ***"the atmosphere… the genre of music, the organisers, the people who go there… and the sponsors"*** all contributing towards defining how festivals differ from each other.

Favourite festivals

Festivals awareness vs attendance



Top UK Festivals



Source: Individual festival websites:

http://www.glastonburyfestivals.co.uk/
http://www.readingfestival.co.uk/
http://www.isleofwightfestival.com/
http://www.tinthepark.com
http://www.vfestival.com/
http://www.channel4.com/t4/
http://www.leedsfestival.co.uk/

http://www.vfestival.com/
http://www.downloadfestival.co.uk/
http://www.bestival.net/
http://www.creamfields.com/
http://www.latitudefestival.co.uk/
http://www.globalgathering.com/
http://www.wirelessfestival.co.uk/

http://www.rockness.co.uk/
http://www.hardrockcalling.co.uk/
http://hopfarmfestival.com/
http://www.lovebox.net/
http://www.southwestfour.com/

The experience

Despite the differences between festivals and their individual identities, ‘the festival experience’ is the common denominator that makes the industry so popular overall and enables its sustained growth.

With the exception of a few people who used adjectives like “muddy”, “messy” and “disappointing”, the vast majority were incredibly positive about the festival experience, describing it as an oasis of pleasure and a haven for fun. For some it is almost sacrosanct and spiritual with escapist and rejuvenating qualities.

Most ridiculous outfit worn:

"A butterfly mask with a skirt tied to my arms to make wings"

Craziest behaviour ever seen:

"A massive midnight pillow fight in the campsite at Reading. At least 100 people involved"

The drivers

The key motivations for attendance revolve around people's love of live entertainment, the atmosphere and the chance to see their favourite artists.

Content and experience are intricately connected, feeding into and from each other. But looking at these thematically, it seems that the experience overall is a greater pull for attendees (64%) and that the content itself is the glue that brings it all together (36%).

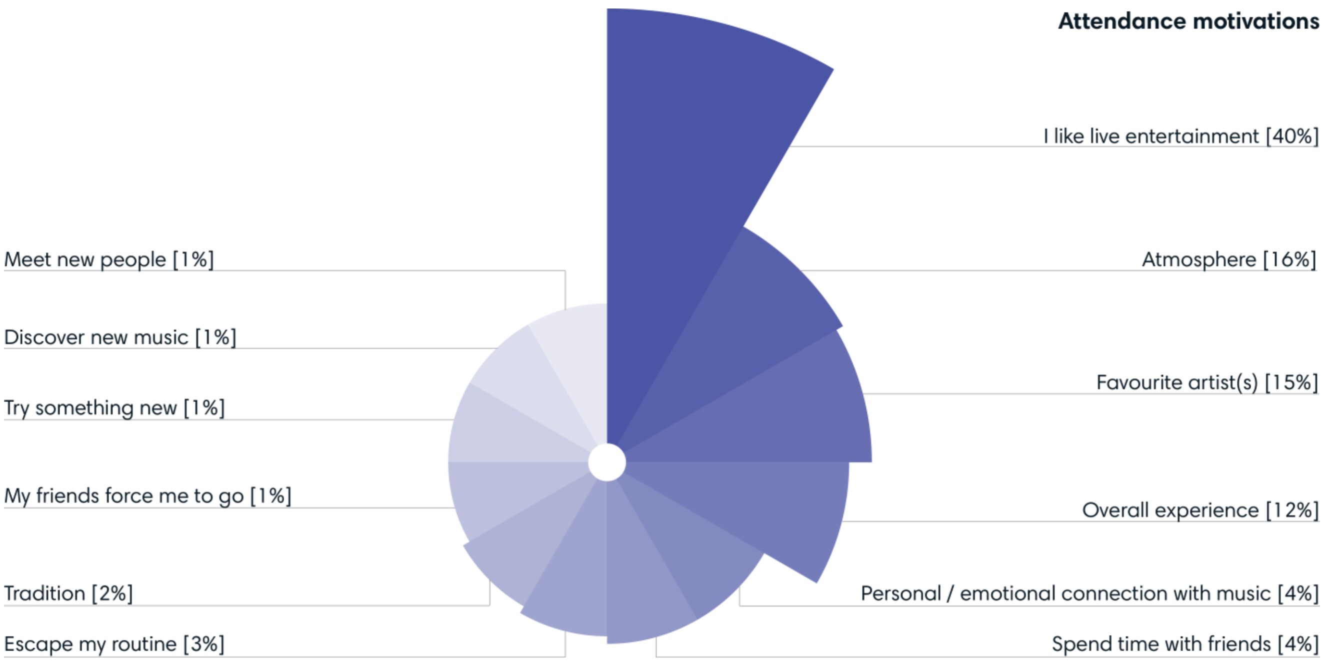
However, when posed with the dilemma of having to choose between either famous artists or an intimate atmosphere, respondents chose the former (71% vs. 29%).

While it is hard to isolate elements of the overall festival experience to understand what makes it so attractive, 60% said they enjoy 'the music' more than 'the madness' (12%) or 'experiencing a different lifestyle' (11%).

Digging deeper into the drivers, we find that festivals also provide the perfect backdrop for spending time with friends (and sometimes family) and cementing relationships, ***"festivals aren't so much about the bands you see but the moments you share with your friends and the times that you will never forget."*** One in three (34%) go to festivals in groups of between three and five, and close to two in five stick to their group of friends throughout the festival. But festivals are also a good place to meet people with common interests (61%) and make new friendships (with 50% keeping in touch with some of the people they meet after the festival).

However, personal motivations around escaping one's routine and connecting with the music are slightly stronger than the social drivers of meeting people and spending time with friends (55% vs. 45%)

Similarly more people go to festivals recurrently and as part of a tradition (55%) than to experience something new (45%).



Authenticity

Escapism is a recurring theme and has an underlining significance which contributes towards the perceived purpose of festivals, ***"having a good time with your mates, great music, letting your hair down for the weekend and forgetting the real world… a weekend where nothing much matters."***

In addition to taking people 'back to basics' and to a more romantic time away from the tensions of reality, festivals have associated values of freedom, authenticity, openness, transparency and community. And festival-goers are protective of this festival 'ethos' and bottom-up identity, which is sometimes seen to be slightly at odds with the commercialisation and commoditisation that some people believe is taking place within the industry, ***"it cheapens the experience."***

The limited availability of beverages within some festivals due to the presence of specific sponsors trying to promote and sell their own products highlights why some attendees (particularly the more engaged) feel that sponsors are diluting or corrupting festivals. Others (18%) just learn to ignore it altogether, although most (63%) agree that if a sponsor is going to be present they should add to the experience, ***"if they were to provide an extra facility that was free to use and the ticket price did not go up then that would make me feel really good about that sponsor!"***

Close to half (47%) say they actually appreciate sponsoring brands, despite the disdain of a minority, which feel that festival sponsorship is tasteless (31%) and intrusive. The issues of authenticity and exploitation came up within the focus groups (***"[they are] money-making machines***") and were addressed by suggesting that brand fit takes priority or that sponsors partner with charities and share their profits, to make their presence more justified and less profit-oriented.

Most ridiculous outfit worn:

"Nothing (literally)"

Craziest behaviour ever seen:

"Dragging a whole tree trunk to a tent and burning it over the next 3 days

The darker side

Beyond commercialisation and profit-making, festivals often have a reputation of being slightly rough or edgy, particularly due to the way people sometimes (mis)behave at them.

Sex, drugs & rock ‘n’ roll

Most ridiculous outfit worn:

“Mankini”

Craziest behaviour ever seen:

“Sex in the crowd”

Within a flat environment of few hierarchies and even fewer inhibitions, the notion of a ‘shared experience’ is sometimes taken too far. Asking about the craziest behaviour ever seen at a festival, the majority of responses included mud, nudity, sex (often with multiple participants) and urine. However, our data reveals a less promiscuous approach, with only one in three having had sex at a festival, and the majority with their partner – only 10% had sex with someone they had just met.

And though some of the crazy things people do at festivals can be off-putting, most are seen to be relatively good-natured and well-intended and are sometimes seen as part of the festival ‘charm’, ***“most people are really happy so craziness doesn't really stand out.”*** A number of respondents also referred to the influence of drugs and alcohol, which is often a contributing factor to both the madness and the escapist nature of festivals.

According to our survey, festival-goers spend an average of £69 on alcohol and 47% consume more than six units on an average festival day. Just under one in five take drugs at festivals, but 28% of them feel that they are an integral part of their festival experience, ***“it's part of that getting away from everyday life and it can enhance your enjoyment of the whole thing, but it does depend on what you're taking.”***

However most of those who take drugs at festivals also do so in their out-of-festival life, suggesting that there’s nothing particularly drug-inducing about festivals or that they make people who wouldn’t usually take drugs do so at the festival. If anything it suggests that festivals provide an open and non-threatening environment, substantiated by the fact that that more than half (52%) of those who don’t take drugs don’t consider them to be an issue at festivals.

Therefore the expectation that festivals are drug-fuelled destinations seem to be slightly overstated, as seems to also be suggested by reports of drugs seizures decreasing at festivals[3].

People also feel quite safe overall, with only 16% having been a victim of crime, the majority of which (81%) was considered petty crime. Consequently security can feel overbearing and unnecessary at times.

3. Burn-Murdoch, J. Quinn, B. (2012, May 21) Revealed: types and quantities of drugs seized by police at UK music festivals. The Guardian http://www.guardian.co.uk/uk/2012/may/21/music-festivals-drugs

Roughing it

Even some of the other supposed detractors, such as ‘roughing it’ with the camping, are seen as ‘endearing’ for some, ***“it makes it all the more satisfying to wash all the dirt off at the end of the weekend.”*** Even so, access to a hot shower and clean towels everyday (64%) overpowered the need for a mobile phone with an endless battery (36%).

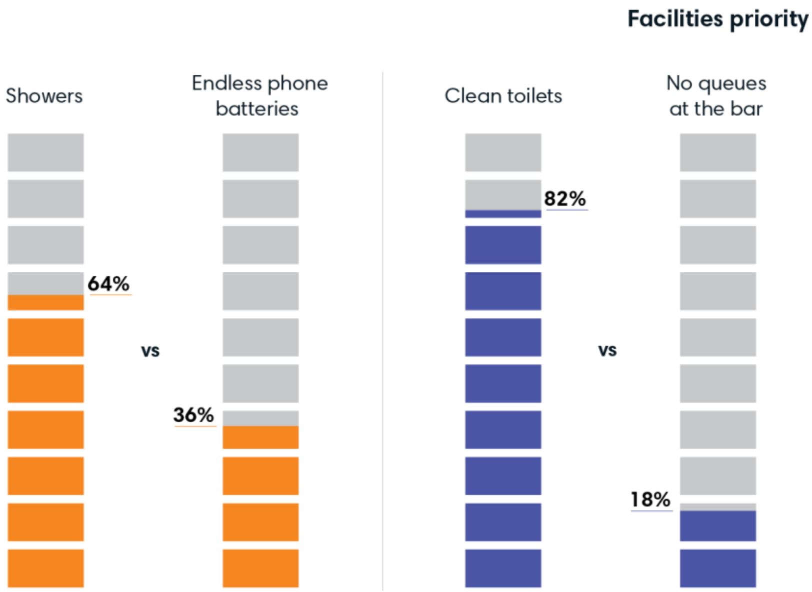
More importantly however, two out of three (66%) would want to see the toilet facilities improved (by a lot for some), followed by 15% who would want to focus on the general cleanliness of festival sites, ***“more toilets and toilet attendants 24/7 is essential … a lot more people would be willing to go to festivals.”*** This was reiterated when prioritising a well-lit, clean flushing toilet with soft loo roll (82%) over no queues at the bar all weekend (18%).

Most ridiculous outfit worn:

“Chicken outfit”

Craziest behaviour ever seen:

“Passed out drunk in middle of the day”



Conclusion

Our research shows that festivals hold a special place in people's hearts, providing an immersive and memorable experience. They have a wide appeal across a range of demographics, driven by a multitude of motivations and addressing a variety of entertainment 'needs'.

These range from the purely social (having a good time with friends), to the transporting (getting away from the 'real' world), converging against the backdrop of music, which in itself is one of the key (but not the sole) drivers for attendance. Festivals also have positive spill-over effects on the music industry and the local economy, encouraging people to buy more music and spend more money in the area.

People have neither lost interest in, nor become disillusioned by festivals and for many, festivals are still a permanent fixture in their social calendar and will continue to be so for years to come.

Appendix

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Methodology

We took a dual quantitative and qualitative approach, using online surveys to provide us with rigorous and robust data and an online focus group to complement our findings and gain some more in-depth understanding of the overall festival experience.

- Online survey with 606 respondents representative of the UK online population and weighted accordingly, to get a sense of how many attend festivals and what are the reasons for non-attendance (fielding between 17 – 20 April 2012)
- Online survey with 1010 festival-goers (who have attended at least one festival in the last three years) to help profile this segment and understand how they feel about and interact with festivals (fielding between 17 April 2012 – 8 May 2012)
- Updated online survey with 330 respondents who have been to at least one festival in 2012 (fielding between 16-24 November 2012)
- 90-minute online focus group with eight participants (mix of male and female), with and without children and all who had been to at least one music festival in the last three years (this took place on 10 May 2012)

Please note that as the research was conducted online, some of the comparisons between online and offline behaviour may have a skew toward online.

For the online surveys we partnered with sampling agency GMI Interactive, to ensure that recruitment of respondents was representative. Response numbers above exclude flatliners and respondents that did not complete the survey correctly. The focus group was facilitated by Clickback.

Where relevant and referenced within the analysis itself we have complemented and contextualised our research with proprietary Live Analytics ticketing data and external sources.

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