The downpours of 2012 seemed to encapsulate the mood among many in the festival business. Austerity measures and the cumulative effect of years of recession were hitting festival-goers, leading to two-thirds of the event organisers surveyed by Festival Awards UK believing that the year was more challenging than the previous one.

As glib as it may appear to be, comparing the sunnier conditions experienced in the fields in 2013 with the mood in the industry, is not inappropriate. Surveying 123 festival promoters this year, just under half felt that 2013 was more challenging than last year. 25% said they felt it was easier and about a quarter felt it was no different.

Media reports this year were much more upbeat compared with the almost gleeful tales of ‘the death of festivals’ in 2012.

Clearly, confidence is up. And why shouldn’t it be? Live music events generate £2.2bn for the UK economy, according to an Oxford Economics study for Visit Britain. These events attract 6.5million people, boost local economies and support 24,000 jobs a year.

The report says £1.3bn was spent on tickets, transport and accommodation, with another £914m going on food, drink and other purchases.

Visit Britain Chief Executive Sandie Dawe says the research shows the pulling power of UK music and its potential to boost tourism. She is now calling for a strategy to pull in more overseas music fans and for towns and cities to copy Liverpool’s efforts to capitalise on the Beatles.

Dawe said: “This will act as a catalyst for us all to ramp up our activity and forge better relationships with festival organisers, promoters, venues and producers.”

It’s about time officials recognised the great benefits festivals bring to local economies and the country as a whole, not just through financial gain, but also through cultural influence and the impact this has on foreigners’ perceptions of the UK.

Festivals still face too much NIMBY-ism from licensing authorities, as a vocal minority can stifle opportunity for tourism and economic growth presented by festivals. While there’s no excuse for poor event planning – which should be resisted at every step – simply objecting to a festival taking place because of a negative perception is an attitude which must be countered by championing the positive effects.

2013 was an incredible year for festivals. From the triumphant return of Glastonbury – hailed by many as one of the best – to the success of new major events such as Barclaycard Presents British SummerTime Hyde Park (featuring some spectacular Rolling Stones shows), and with events such as Creamfields and the Isle of Wight festival pulling out all the stops to get back on track after terrible weather problems the previous year, there is much to celebrate.

What did the ticket-buyers make of this season’s events? The annual UK Festival Census has concluded another survey of 3,380 British festival-goers – a sample of geographically and demographically representative respondents who answered questions on attendance, preferences, and expectations.

Over the next few pages we reveal the results.
WHO ARE FESTIVAL-GOERS?

Of the 3,380 people that responded to the UK Festival Census 2013, 42% were male and 58% were female. Two-thirds (60%) are under 30, with 17% aged 31-40 and 20% aged 45-65. The remaining 3% were 16 and under, or over 65. 49% are “single and unattached”, 30% are in a long-term relationship and 18% are married/in a civil partnership. 27% have children.

In terms of income, 26% said their annual income is less than £10,000, while 27% said it was between £15,000-£30,000. 8% earn over £40,000.

Where do all these festival-goers come from? 35% are from London and the South East, 14% from the South West. 17% are from the North of England.

Generally they drink beer, cider, wine and spirits when at home, and these trends tended to be borne out at festivals – with people mainly drinking the same at a festival as when they’re not. However, the proportion of people who chose to drink beer at a festival fell slightly, while cider preference is up – supporting the cliché that people drink cider at festivals.

The largest amount of people (36%) don’t have any particular preference about the size of a festival, while 15% prefer a festival of 5,000-10,000 people, 22% prefer a festival of 10,000-30,000-capacity and 12% love the big festivals of over 30,000 people.

What did you love most about the festivals you attended this summer?

Why do people go to festivals? Mostly it’s the music – 53% of people said it was the thing they love above all else. A further 22% go because they can “escape from normal life” and 11% love hanging out with their friends the most. Festivals are indeed a unique experience, which combine people’s passion for music with a sense of community – something which is borne out away from the festival itself via social media. Many festivals have fully engaged fans all year round, people they have conversations with and communicate with at all times of the year.

It’s this opportunity to escape from normal life that is so wonderfully compelling. The escapism offered by festivals can be seen in a beguiling array of expressionism on-site. From fancy dress to silly hats, exploring new music to just sleeping in a tent, British people love throwing off their day-to-day routine and having new experiences.
Generally people are all very positive about their festival experiences. When asked what is the biggest downer for them at a festival, the largest proportion say nothing was bad. Following that, 16% feel the biggest frustration for them is when their favourite bands clash on the bill. Otherwise, there’s a fairly even spread (at about 6% for each factor) mixed between having to rough it without clean showers or toilets, the price of tickets, the cost of food and drink on-site, muddy conditions, overcrowding, and restrictions on what you can bring in.

In fact, when asked what home comforts they miss most at festivals, 34% say they don’t miss anything. Unsurprisingly 26% miss clean flushable toilets, while 15% say they miss their bed and 15% miss their home shower the most.

Most people like music in the dance, indie and rock genres, and only a few (16%) appreciate classical music.
What impact has the state of the national economy had on UK festival-goers’ attendance at festivals?

There were a number of high profile festival cancellations in 2013, such as Leicester’s Summer Sundae and Vince Power’s The Hop Farm Festival (although it looks set to run again in 2014 according to media reports). There’s no doubt that financial pressure on young people who attend festivals, and continued negative media reports about the health of the economy presents a challenge.

Of the promoters surveyed by Festival Awards UK, 21% believe that the reason for festivals finding it harder this year compared to last year is the current economic conditions, but how do festival-goers feel about the situation?

The 2013 UK Festival Census results show that 27% of people said they attended fewer festivals as a result of the state of the economy. This is up from the 20% who said that they attended fewer festivals as a result of the economic conditions in 2012’s Census. Looking back further in time, in 2010, 19% of respondents felt that they attended fewer festivals. However, 40% of 2013’s respondents said it didn’t impact their festival plans. This is a slight decrease compared with the 46% in 2012 who said it didn’t affect their festival plans, while in 2010, 43% said it hadn’t affected their plans. What this indicates is that there’s still strong support for festivals and that people feel attending a festival is still a key part of their spending habits.

As the festival market matures, people are becoming much more picky about what they go to. This is great news for those festivals that have got their formula right, as they will emerge from this period stronger, leaner and with a more dedicated fan base. For those that are finding it harder, this is an opportunity to examine what they need to improve to get back on track. With such creativity in the industry there’s bound to be an exciting response to the challenge.

When asked “what is your opinion of festival ticket prices?”, 55% said they felt they were about right, with 16% believing they offer good value for money. However, 29% felt they were over-priced. This figure is unchanged compared with the results of the 2012 Census. The fact that over 70% of people believe that festival ticket prices are either about right or good value for money is good news, especially with rising prices and the uncertainty of the economy impacting people’s considerations.
The amount of money that people spend outside of their ticket is also a key factor to examine when assessing the effects of the economy on festivals. When asked how much they spend before a festival (excluding ticket), 23% said £10-£50 (31% in 2012), 33% spent £50-£100 (29% in 2012), 17% spent £100-£150 (15% in 2012) and 11% spent £150-£200 (9% in 2012).

By comparison, asked how much they spend while at a festival, 18% said £10-£50 (18% in 2012), 30% spent £50-£100 (28% in 2012), 19% said they spent £100-£150 (22% in 2012) and 19% spent £150-£200 (19% in 2012). Although marginal differences from year to year, the increasing amounts being spent before a festival indicate that people are certainly prepared to spend – and although it may be too early to say – it hints at returning confidence. The Festival Awards UK survey of 123 festival organisers asked why they thought festivals had found it more challenging. The majority believe it is due to “market saturation”, followed by the economic downturn. In fact, it’s probably both. Ticket-buyers are spending money and they do feel that festivals are priced right. But they are being more choosy about which ones they attend. They are becoming much more discerning in a mature market which has an abundance of supply.

Results from the 2013 UK Festival Census show that 34% of respondents purchased festival-branded merchandise at a festival, down from 42% in 2012. However, the reasons for buying the merchandise are pleasing to see. A large proportion of people said they bought merch “Because I want to support the festival” and “because it reminds me of the great times".

The amount spent at a festival appears to remain fairly constant compared with last year, which is probably unsurprising. In fact, it has changed little in the last six years. The UK Festival Census 2007 showed that 19% of people spent £10-£50 at a festival, 35% spent £50-£100, 32% spent £100-£200 (2013 total: 39%). This increase in expenditure at the higher end of the scale indicates there may be other ways of growing their income without increasing ticket prices across the board. 10% of respondents said they bought VIP/premium camping facilities at a festival this year, and 90% of those who did, said they would consider doing it again. While some may be feeling the pinch, there are clearly others who aren’t – and their needs can be catered for without alienating the existing customer base.

Food and drink is a key income stream for most festivals. It’s also one of the most talked-about elements from a consumer point of view. No longer restricted to a few burger vans dotted around the site, the options for eating and drinking are an important element of creating a good festival – and something many festival-goers comment on. However, the costs are very unpopular with Census respondents. In 2013, 75% said they felt drinks were over-priced, with only 19% feeling they’re about right. When it comes to food, 65% felt it was over-priced, although 29% felt the food is priced about right. That said, only 13% felt that the price of food and drink on site was “the biggest downer” for them.

When it comes to the choice of drinks available at festivals, 75% felt it was either “excellent” or “OK".
An Oxford Economics study for Visit Britain, published in October, showed that of the £2.2bn spent on live music events in the UK last year, overseas visitors made up 6% of the fans but accounted for 20% of the money spent attending festivals and gigs. Many countries around the world recognise the value of festivals to attracting international visitors – and help them to do so through funding from the national tourist board. British music festivals see little in the way of this kind of support. Where it is given it is rarely financial, and instead is marketing. Visit Britain Chief Executive Sandie Dawe has called for a strategy to pull in more overseas music fans, saying the research "will act as a catalyst for us all to ramp up our activity and forge better relationships with festival organisers...". It’s time for the government and local authorities to have a similar realisation and to respond as best they can under the restrictions imposed by austerity measures to this clarion call.

The fact is that it’s not just UK festivals that attract international visitors. According to the results of the Census, 14% of festival-goers went abroad for a festival in 2013. Those that did go abroad mostly (46%) said that it was specifically because they could have a holiday as well as attend a festival. 10% answered that they went because “it feels adventurous”, 14% said because “it’s a cool thing to do”. Only 2% said it was because of poor UK weather and only 6% said they chose to go abroad specifically because it’s cheaper than British festivals. However, 20% told us they went abroad for a festival for all the reasons above – a combination of better weather, cheaper cost, adventure and they could have a holiday. Other responses for why people attend festivals abroad, included “to see other bands and meet other people”, and “The line up and the reputation of the festival”.

Of those that went overseas, 39% said it was their first time at a festival outside their own country. While only a small proportion of people are choosing to leave Blighty for festival experiences, it’s clear that UK festival-goers are adventurous – although possibly not as adventurous as our European counterparts: the 2012 European Festival Census showed 35% of respondents had attended a festival outside their own country. Some festival organisers worry that their ticket-buyers are being attracted away to overseas events, and indeed some are. But there’s a great opportunity for partnerships between British events and the tourism authorities to attract more visitors from outside these shores. This would certainly even up any gap and create a more cosmopolitan experience for everyone.
For many festivals, sponsorship of some shape or form is a vital income stream, although some feel it isn’t appropriate for their audience and refuse to approach brands.

In the last five years there has been a marked sophistication of brand activation at events. No longer a straightforward badging exercise, festivals and companies are working together to create added-value elements that improve the overall experience.

**What is your opinion of brand sponsorship at festivals?**

- I accept that festivals need it but it doesn’t improve my enjoyment: 56.9%
- I think it can make the overall experience more enjoyable for fans: 23.1%
- I don’t notice it: 13.7%
- It puts me off: 6.3%

The impact of this increasing refinement is reflected in attendee attitudes towards sponsorship. In 2012, 15% of people believed that sponsorship at festivals made the overall experience more enjoyable. This year, that has leapt to 23%.

The proportion of people who feel it puts them off has fallen from 9% to 6%, while those that say they don’t notice it has also dropped – from 17% to 13%.

The vast majority (57%) say they accept that festivals need it, but say that it doesn’t improve their enjoyment.

Getting the balance right between the overall ethos and vibe of an event and balancing the books is a tricky matter and there is no one-size-fits-all solution because festivals and their audiences are so diverse. However when it’s done right, with sensitivity and passion it can be a powerful tool for combining two aligned brands - that of the company and that of the festival.
Technology has been playing an increasingly large part at festivals in 2012, as more sophisticated software is built, costs come down and events embrace the opportunities presented by developers and tech firms. Social media marketing has been widely embraced across the industry, not only for the potential for communicating with a wide variety of people in a comparatively low-cost manner versus traditional media, but also because of the data which can be captured and analysed. This deeper understanding of fans is being used by the most savvy to ensure their take a lot of the guesswork out of catering to their consumer’s desires.

Cashless payment methods are on the cusp of making a major breakthrough. Technology observers predict that 2014 will be the year these systems break through. This year Standon Calling festival went fully cashless and Barclaycard Presents British SummerTime Hyde Park had facilities to enable all 65,000 visitors to have the ability to pay via Touch to Pay, Payband (a preloaded RFID wristband) and conventional credit and debit cards on every single bar on site, using over 350 machines. Many major and independent festivals including Glastonbury, Isle Of Wight, T In The Park, V Festival, Weyfest, Radio 2 Festival In A Day and Combury took their first steps to becoming cashless by introducing contactless and chip & pin credit and debit card payment facilities at their main bars. According to Intelligent Venue Solutions, who provided this service, simply enabling people to make card payments has increased on-site spend across the board.

There’s also increasingly sophisticated planning software, high speed wireless internet at greenfield sites, the use of livestreaming as a powerful marketing tool, and increasingly sophisticated apps. Creativity from technology companies is improving promoters’ lives in many ways, helping them understand more, communicate more, plan better, be more efficient and do the thing they do best – produce excellent events.

One message which comes through loud and clear from the 2013 Census is that consumers are becoming more discerning. What can festivals do to in the future to ensure they remain competitive and continue to attract these passionate music-lovers?

The green shoots of economic recovery are a positive sign for festivals, but it is clear that festival-goers have high standards and it is down to promoters to accommodate these expectations in a cost-effective manner if they are to survive. Asked what would be most likely to put them off attending the same festival(s) next year, 25% said a 5% increase in ticket prices would put them off – this is up from 19% in 2012. 28% said fewer acts/stages would put them off (30% in 2012), 22% said fewer high-profile acts would make them...
think twice about booking again (25% in 2012), 2% said a different location, 5% said a 5% increase in alcohol prices would put them off (3% in 2012), and 18% said none would put them off (21% in 2012).

How can festival-organisers make their events more attractive to attendees or potential attendees? A couple of points emerged from the census that may be worth deeper investigation.

86% of people who responded to the Census own a smartphone. Of these people 71% took it to a festival. The rate at which these phones use battery is infamous, so how were people coping?

17% said they took an alternative phone with a longer lasting battery in it, 8% brought both their smartphone and one with a longer-lasting battery, while only 3% said they didn’t take a phone to a festival.

There was much media attention this summer on the budget mobile phones that are on the market which boast battery life of weeks rather than hours. Almost a fifth of people plumped for this option, the survey shows.

Census results show that 46% of people recharged their phone at a festival. They did so either by using a charging station (40%), buying a fully charged phone battery on site (3%), or bringing a pre-charged battery with them (24%). The remaining 32% charged it in their car/campervan or were staying in a hotel. A handful found friendly people at catering concessions who agreed to let them charge their phone from their power supply.

Clearly there’s great demand for charging phones at festivals, but there’s also a significant proportion of people who are finding alternatives to using on-site facilities. This could be down to cost, or the waiting times in queues at charging stations. Is there an opportunity here for festival supplies shops to sell pre-charged batteries – as this is something not widely available currently – or just more charging points on-site?

Another strong view that came through was around toilets. 71% of festival-goers felt that there should be more ‘luxury toilet’ facilities available. However, only 9% of people went to one this summer. The reasons given for not using the facilities were mainly because they couldn’t afford it – which, as these facilities cost only a small proportion of overall festival spend, is a strong indicator that they really meant that they chose to spend their money on other things.

There is clearly an opportunity for factoring in either less expensive such services, or focussing on the standards of the general toilets. When thousands are using the facilities, it can be almost impossible to keep every loo as clean as people experience at home, but there is clearly an expectation that standards could be higher.

Written by James Drury. The UK Festival Census was carried out by CGA Strategy (www.cgastrategy.co.uk)
Social media is a powerful marketing tool, as many festivals know. Facebook can help events stay in touch with their audiences all year round, and have conversations with them about what they liked and didn’t like, what they find funny and generally get a better understanding of their fans. The Facebook Insights tool provides some interesting top-level demographics, but despite its name, it isn’t very insightful.

This year, Festival Awards teamed up with bespoke digital marketing and planning software Festival HQ to show how interesting the insights can be from Facebook, using the right tools.

Using the social login gave us the chance to get a greater understanding of the Festival Awards voters. All the information was anonymous, but gives some examples of statistics which festivals could use themselves to have a greater understanding of their audience. This could be used to help build a better experience for people, help inform line-up decisions, understand the best commercial partners to work with (or not!), and more.

Using a sample of 1,027 from the UK voters who registered using social login, we were able to uncover statistics such as:

- **340 Average number of likes per profile**
  - Of which an average of **23%** are music likes
- **Average age of voter was 26**
- **280 Average number of friends per user**
23%  NUMBER OF USERS WHO LIKED A FESTIVAL WITHIN 50 MILES OF THEIR POST CODE

88%  NUMBER OF USERS WHO LIKED MORE THAN 1 FESTIVAL

65  AVERAGE NUMBER OF FRIENDS WHO LIKED A FESTIVAL

8%  NUMBER OF USERS WHO SHARED LIKES FOR A FESTIVAL, MOBILE BRAND AND ALCOHOL BRAND