

State of Play: Festivals UK

Diving into what makes
festival-goers tick

ticketmaster

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Foreword

Every year we dive into a segment of the live industry to find out what fans love, what they don't like and ultimately...why they buy that ticket.

With festivals a staple in the summer calendar for most Brits, we ventured back into green fields, mosh pits and seas of tents to find out what makes festival-goers tick.

Surveying nearly 4,000 festival punters across the UK and drawing on ten years of ticketing data, we've created this report so you can dig deep into the mind of your festival fan.

Here you'll find out why fans go to festivals, who they go with and how they get there. How much they spend on food and drink, what they really think of sponsors and how much they want to spend on a festival

ticket. We also take a look at the growing importance of sustainability and line-up diversity to fans, and the importance of festivals in the discovery of new music and artists.

We are constantly told that the festival market is over saturated, but is that really true? With our transactional data we can see the ever-growing popularity of the festivals we ticket for. Since working at Ticketmaster I have not only seen the number of tickets we sell for certain festivals increase year-on-year, but also the number of festivals we sell for and the extraordinary diversity of line-ups and experiences they offer.

I know that some of the facts you will read in this report may be of no surprise, especially if you are a Ticketmaster client with access

to our customer data insight tools, however I'm sure it will throw up some surprises and food for thought. Particularly around the importance fans place on those trendy food trucks to curb their festival appetites - gone are the days where a burger and fries or some falafel sufficed...

As always, myself and the team here at Ticketmaster would love to hear from you if you have any thoughts or questions. We can be reached at hello@ticketmaster.co.uk

Sarah Slater,
*VP of Music and Festivals
at Ticketmaster UK*



Audience



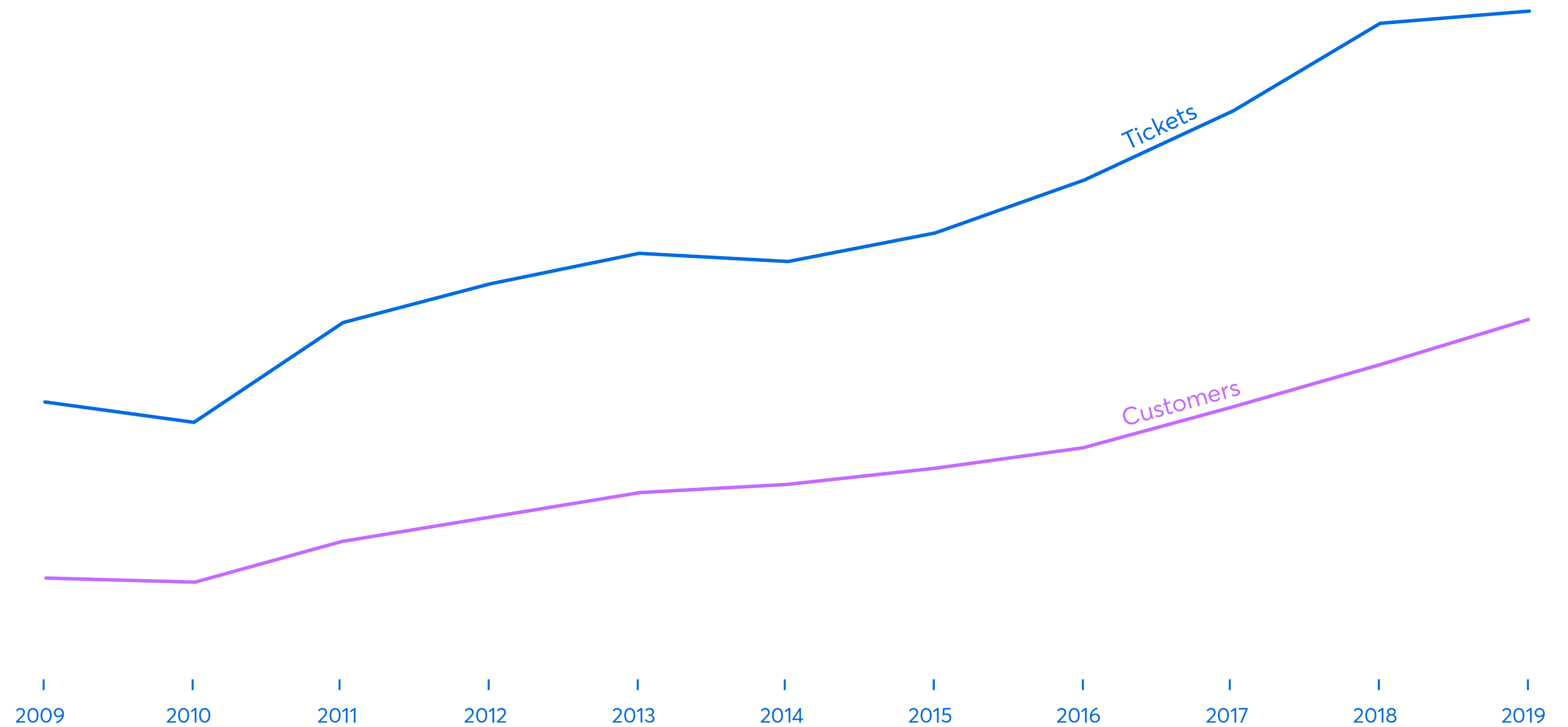
Audience

Festival-goers make festivals what they are – the sparkling line-ups, new experiences and great food and drink on offer would be nothing without a dedicated and diverse audience ready to jump in and have some fun.

In the UK we have more choice than ever with the huge range of festivals catering to every taste - from buzzing inner city events to some of the most iconic festivals nestled amid the British countryside. Our 2019 State of Play report shows that the appetite to attend festivals is only increasing: since 2009 sales of festival tickets continue to rise year on year.

With almost half of people saying they have been to a festival in their lifetime, it's clear that the UK festival scene is truly thriving.

Festival tickets sold by Ticketmaster and number of customers since 2009
Base: Festival customers since 2009

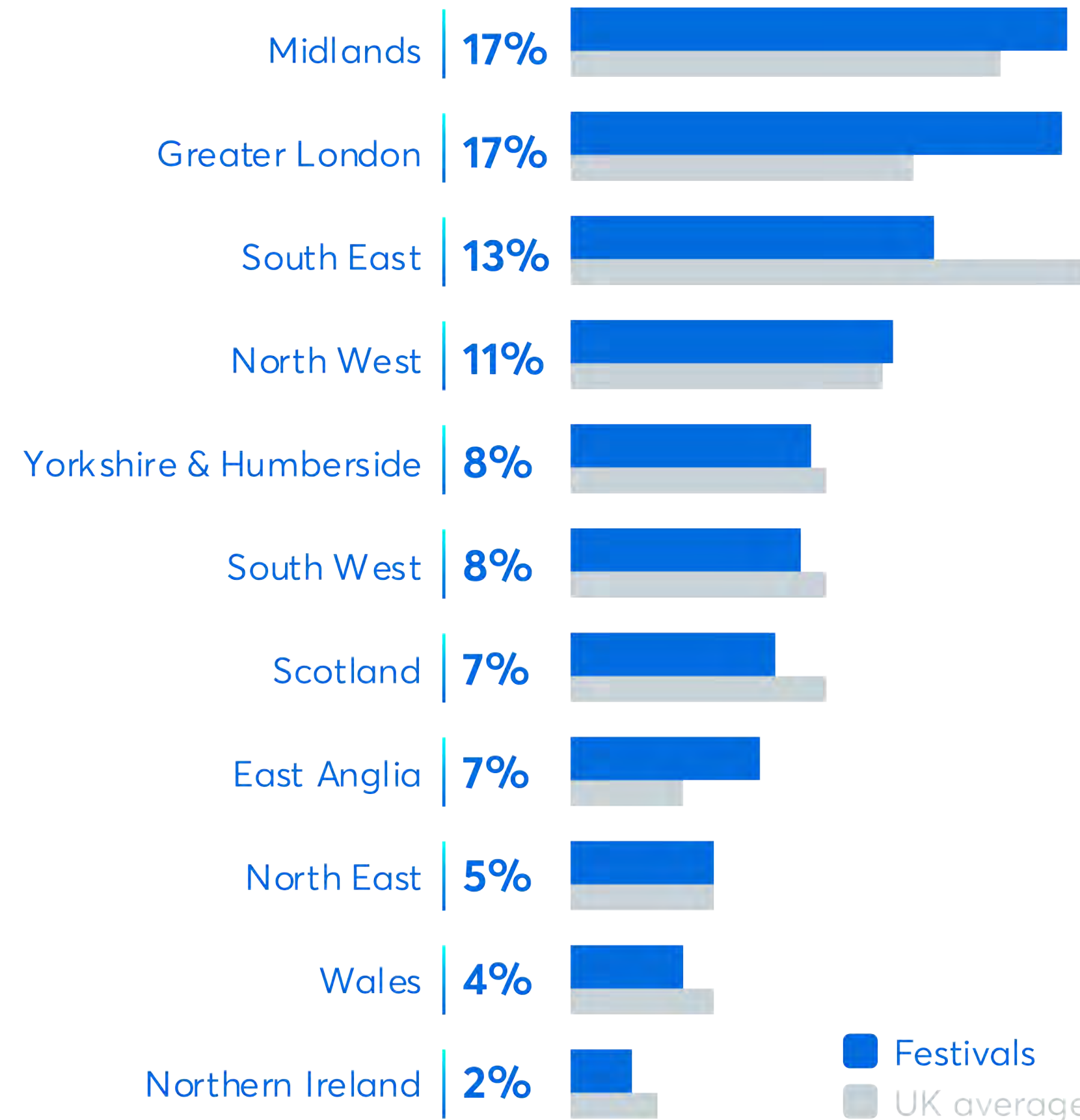


Who are today's festival-goers?

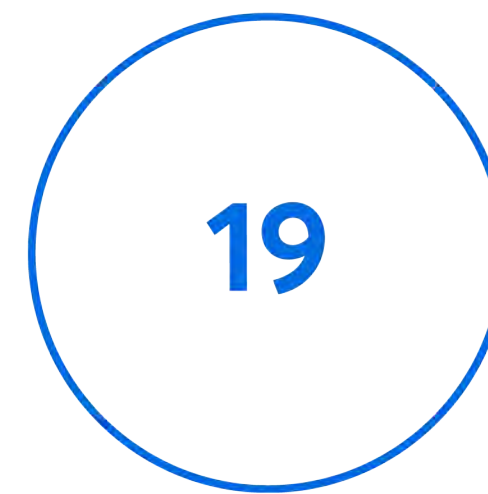
Festival-goers span all age groups, including the over 65s, showing festivals are not just for the young. They come from all corners of the UK, with those from the Midlands, Greater London and the South East being the most likely to head to a festival.

From transactional data, we discovered that festival-goers are most likely to be between the ages of 25 and 34, with most having their first festival experience at the age of 22.

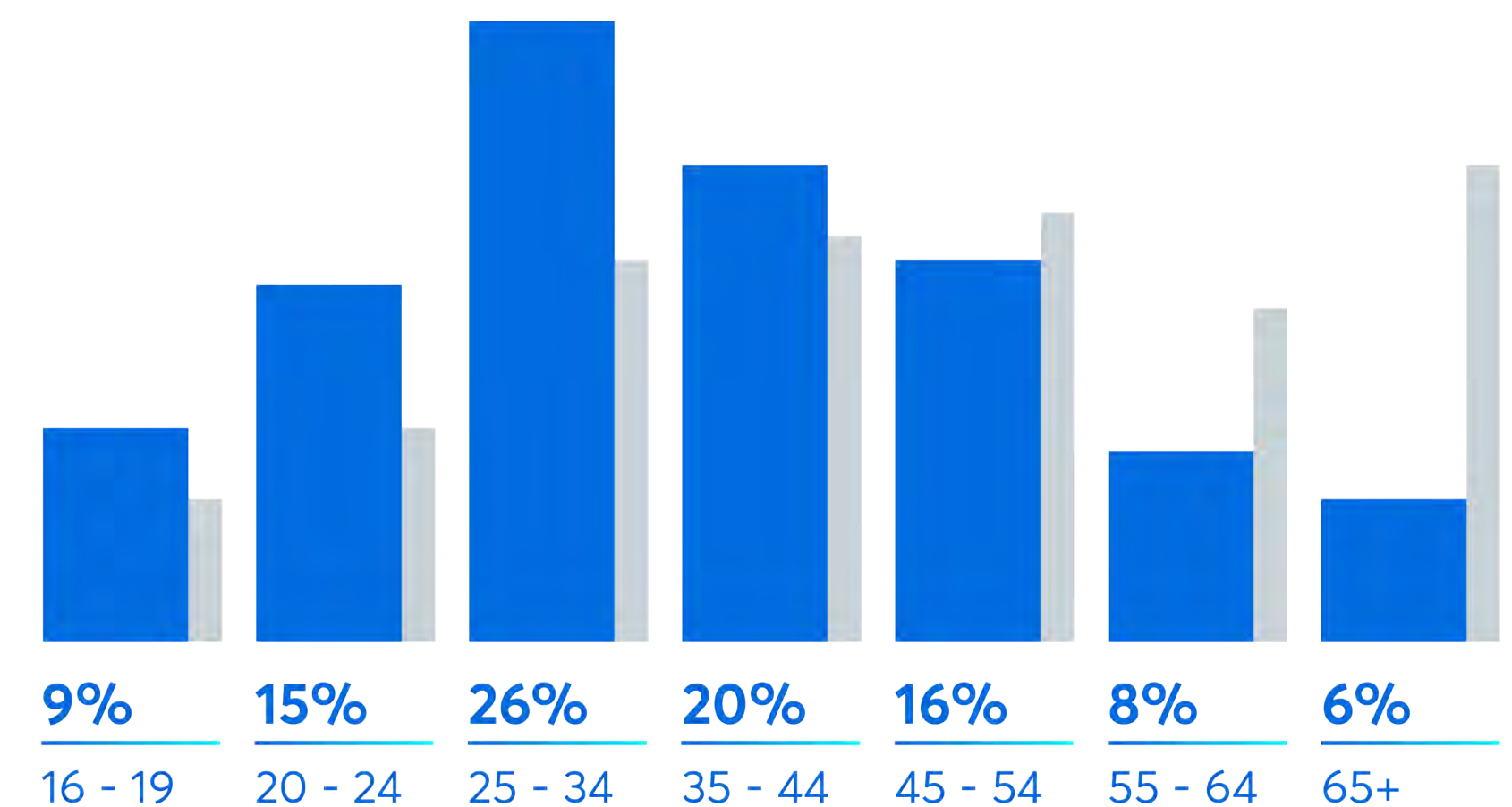
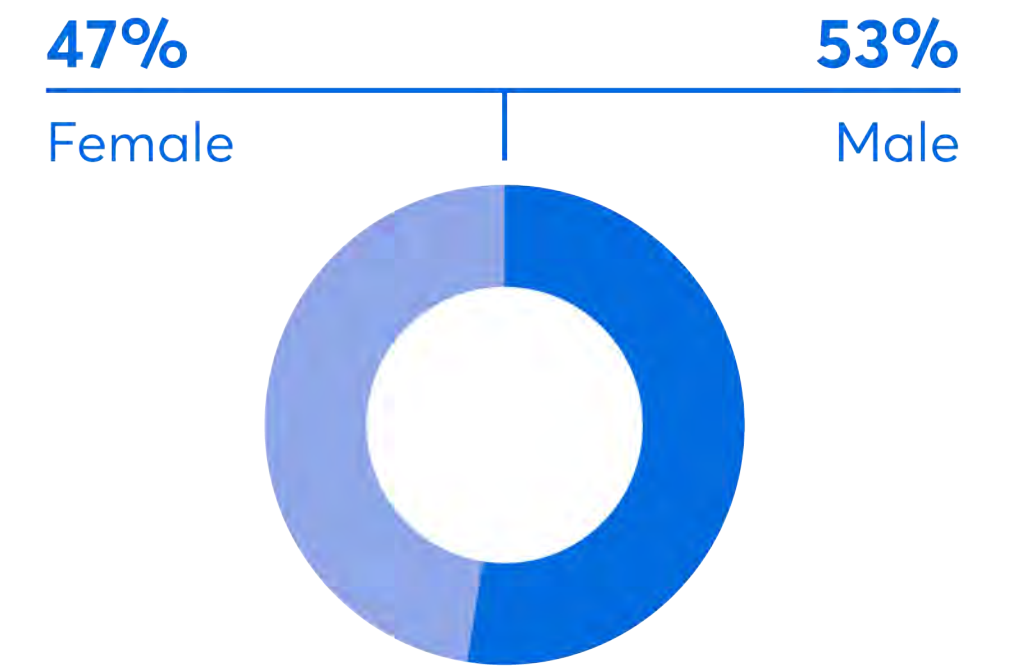
Whilst most people opt for one festival a year, a dedicated few (3%) say they have attended more than ten since 2016.



Age most attend their 1st festival



Profile of the UK festival fan
Base: Festival fans = 3,987



The festival personas

Analysis of our data found that there are five key personas of festival-goers, each looking for something different from their festival experience:



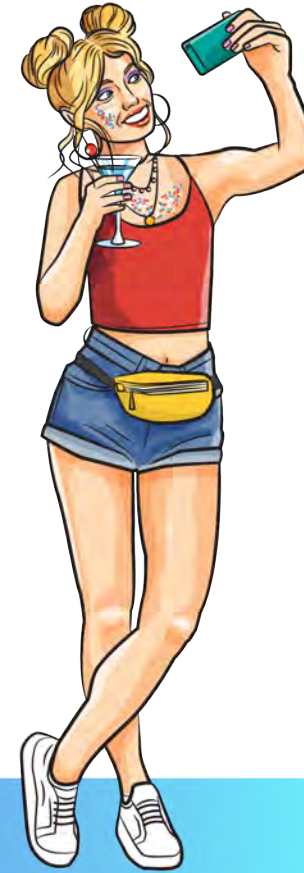
Lost in the Sound

- Typically aged between 25-35
- Music is their main motivator but they also care about the sense of community, attending the same festival each year with big groups of friends
- Beer or cider is their drink of choice and reasonably priced food is important to them



Festival Vet

- Typically aged between 30-40
- Goes to one festival each year, usually the same.
- There for the music but also to switch off
- Searches for playlists to listen to artists on the line-up before they hit the festival



Here for the Party

- The youngest festival fan
- Most likely to go to larger festivals and attend a different festival every year
- While music is important to them, they are also motivated by going to have a good time with friends
- Opt for cocktails and cheap food



Boujee Boutique

- Prefers a small community vibe, boutique and urban festivals
- Attends different festivals, often one-day festivals and usually it's a VIP ticket
- Main motivation to attend is to lose their inhibitions
- Big on all alcoholic drinks, particularly prosecco



Toe Dipper

- Aged 25-45 – the biggest age range of all personas
- Prefer small and family friendly festivals, they are motivated to buy tickets to spend time with friends and family
- Drink beer, soft drink, or water
- Most likely to start listening to new artists they discover at a festival

Festival loyalty

Festival-goers are like boomerangs: when they find a festival they like, they are likely to go back again and again. 44% said they go to the same one compared to 29% who find different festivals each year.

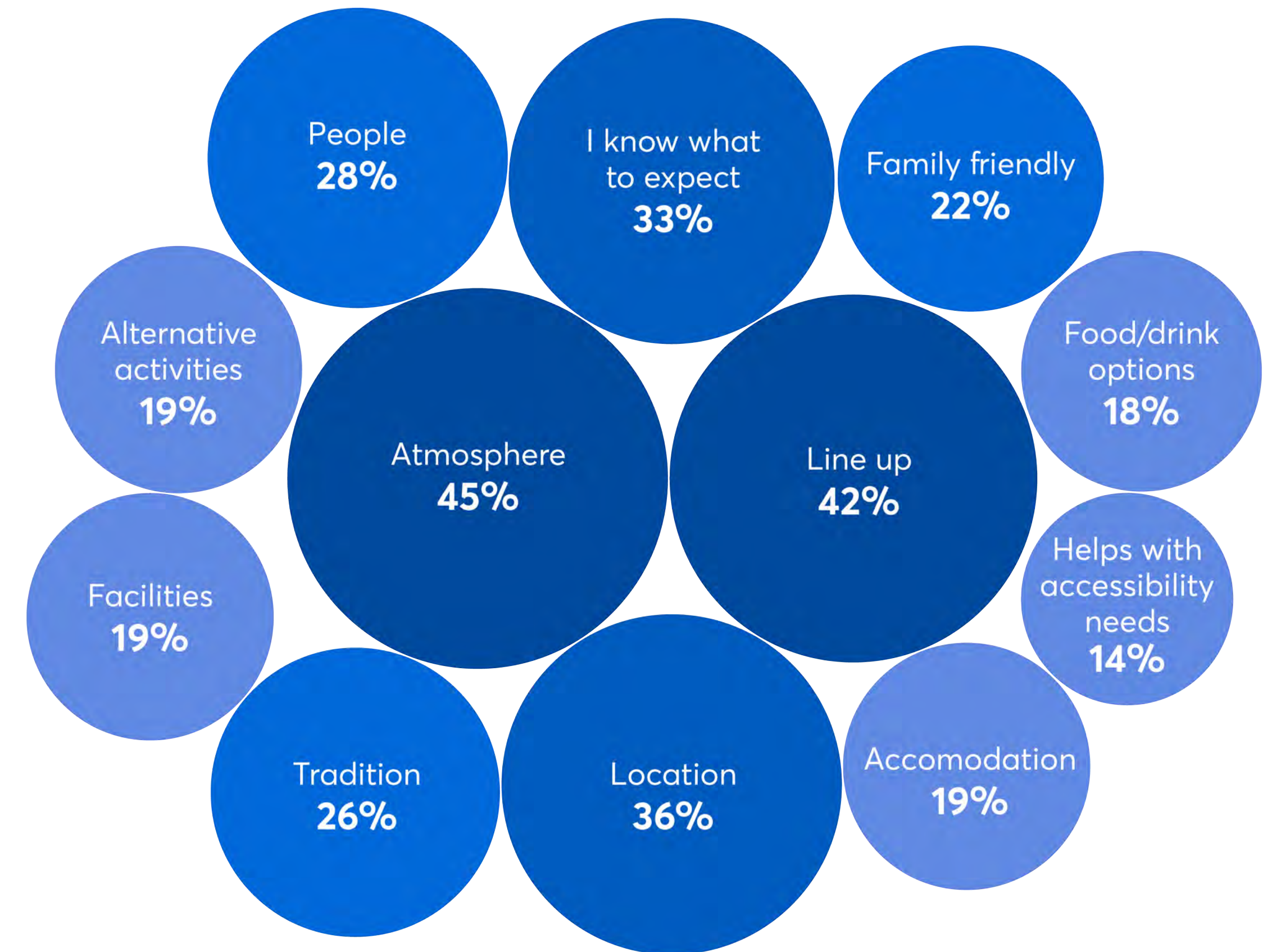
Fans of metal, punk, rock and indie are the most likely to choose the same festival, echoed by the finding that Download fans appear to be the most loyal.

The atmosphere, the line-up and the location are the three most common

reasons people have for attending the same festival. With familiarity and a sense of tradition also ranking high, it's clear that the tried and tested festivals become a yearly fixture on people's calendars.

Festival facilities have less of an influence with only 19% saying the facilities or accommodation options affect their decision to go to the same festival.

Reasons fans attend the same festival
Base: Those that attended the same festival = 1,754



What other events do they attend?

Festivals have diversified in the entertainment they offer with many now providing comedy, literary and family activities on-site. So it's perhaps no surprise that festival-goers show an active interest in other areas of culture and entertainment too.

Compared to the UK average, festival-goers are more likely to buy tickets to Art & Theatre, Comedy and Sport events through Ticketmaster.



The run-up



Why go to a festival?

The build-up to a festival is an exciting time for fans – waiting for the line-up to be announced and the anticipation of securing tickets have all become synonymous with the festival experience. While social media and digital advertising are an ever-growing influence in our modern world, it's nice to know we still rely on our friends. Personal recommendations come out on top as the best way to find out about festivals, and our research shows that spending time with friends is one of the main drivers to go.

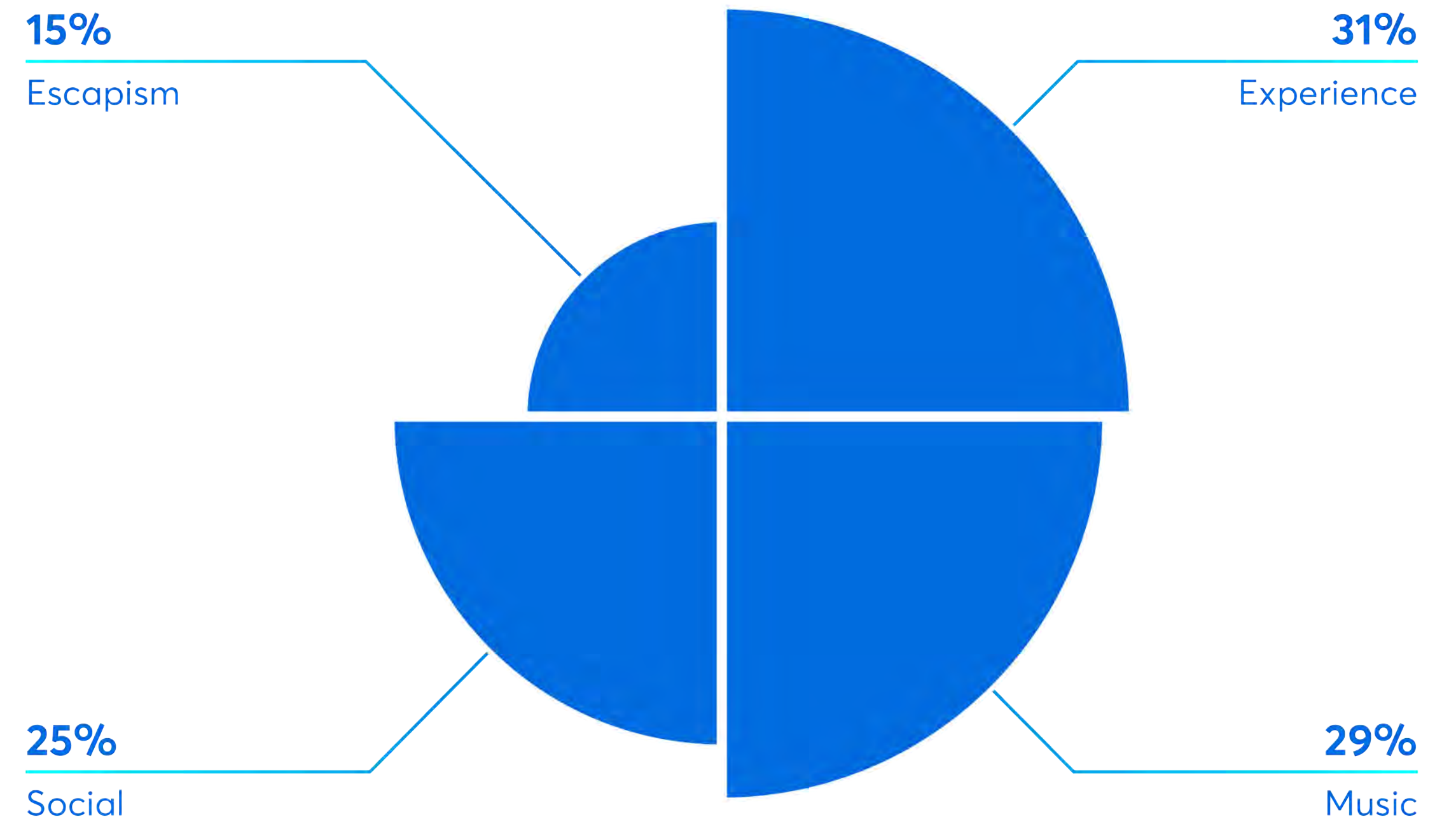
For three in ten fans, festivals are all about the music with 29% saying it's their main reason for attending.

Indeed, our app data analysis shows that 75% of people's time at a festival (excluding time at the campsite) is spent by the stages – showing that the thrill of live music is still top of the agenda. On average, fans visit three stages during a festival, 20% will visit more than five.

Our study shows a few other great reasons for heading to a festival – with 31% going for the experience, 25% for the social aspect and 15% for a sense of escapism.

As fans get older their reasons for attending evolve. Younger fans are more likely to want the experience and feeling of escapism, while older fans are there for the music and to socialise.

Main reasons people attend festivals
Base: Festival fans = 3,987



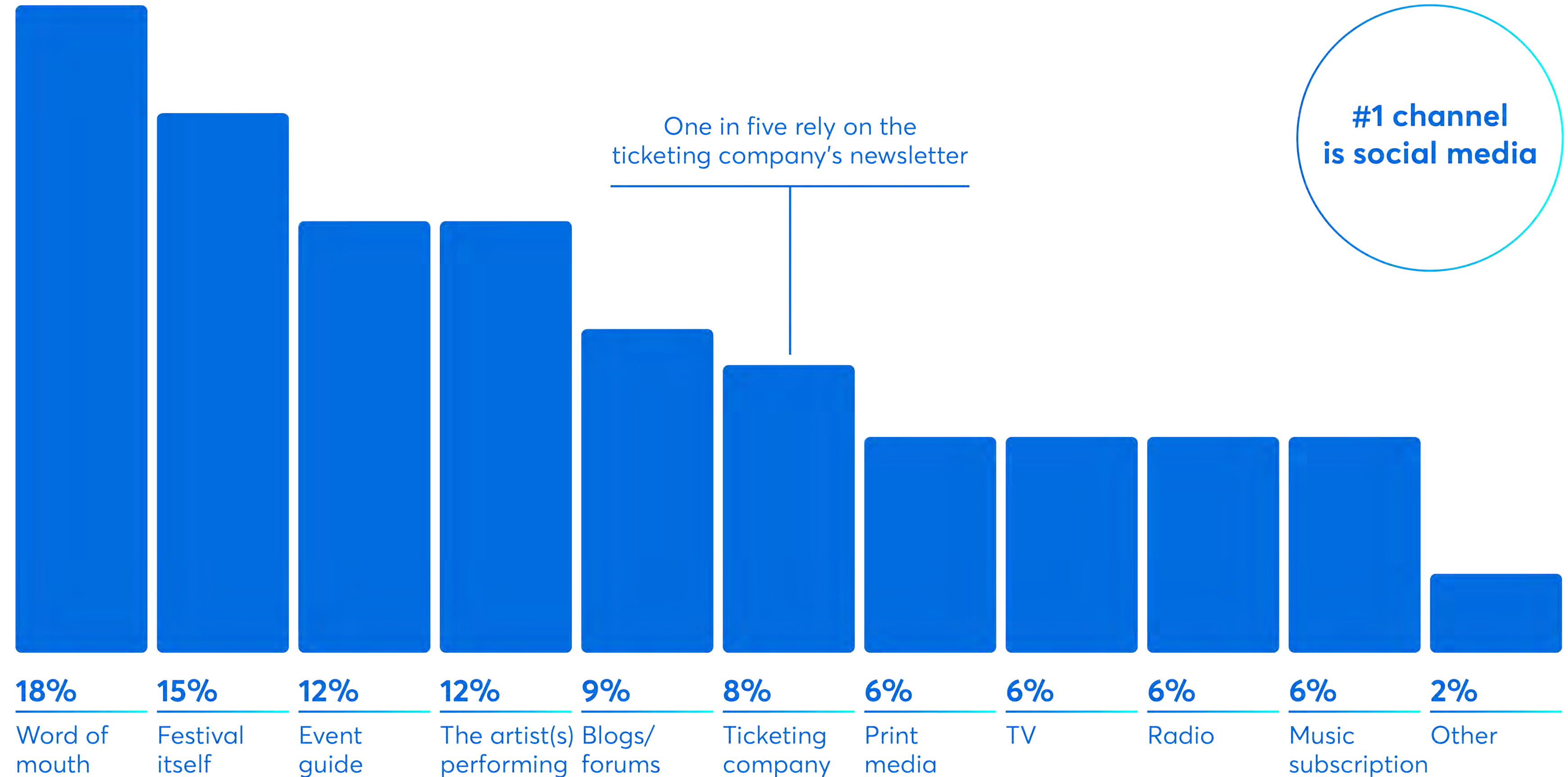
Information source

Word of mouth is the most likely source for fans to find out about a festival. This is followed by the festival's marketing, event guides and information from the artists themselves.

Social media is the number one source of information with three fifths of fans relying on social for updates, and Facebook accounts for most of it.

The younger festival fans rely on the artists performing and music subscription services, with older festival fans looking more to traditional sources like word of mouth, event guides, and print press.

How fans find out about festivals
Base: Festival fans = 3,987



When fans book

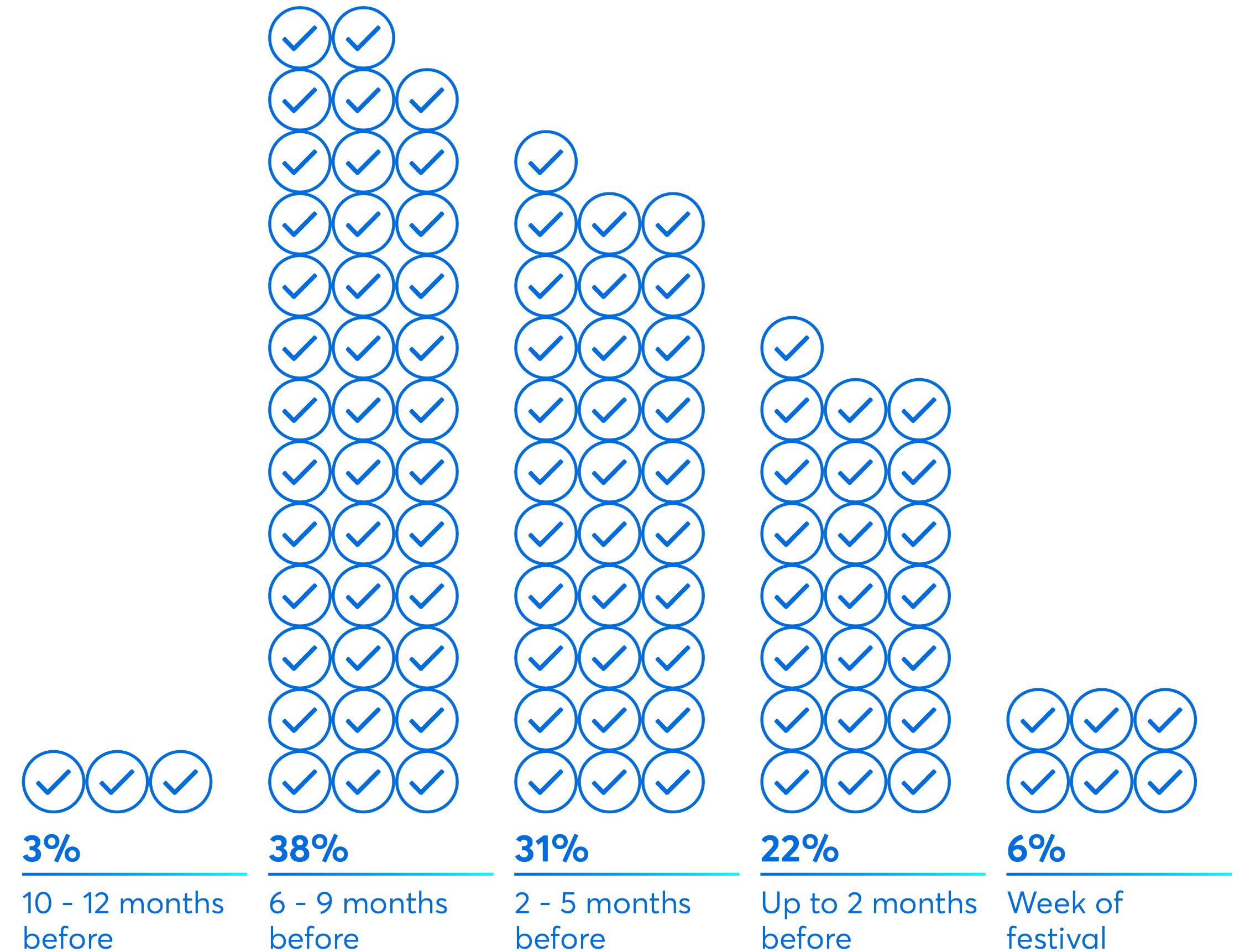
Our insights show that two in five purchase their tickets at least six months before the festival, but over half purchase closer to the event. In fact, the proportion of customers purchasing when tickets first go on sale has been decreasing since 2010, from 40% to 25%.

Unsurprisingly, fans who attend the same festival every year are more likely to purchase during the presale, and less likely to buy at the last minute.

As age increases, so does the likelihood that fans will book early. Those aged 16-19 are the most likely to be spontaneous late bookers.

Regionally, Londoners are the latest bookers, whereas the Welsh are the most likely to buy early bird tickets.

How far in advance customers book tickets
Base: 2018 festival customers



Line-ups

The line-up announcement can be an influential factor in determining when fans choose to buy a ticket. Two-fifths will buy with three-quarters of the line-up revealed, but 14% need to know all artists performing before they buy their tickets.

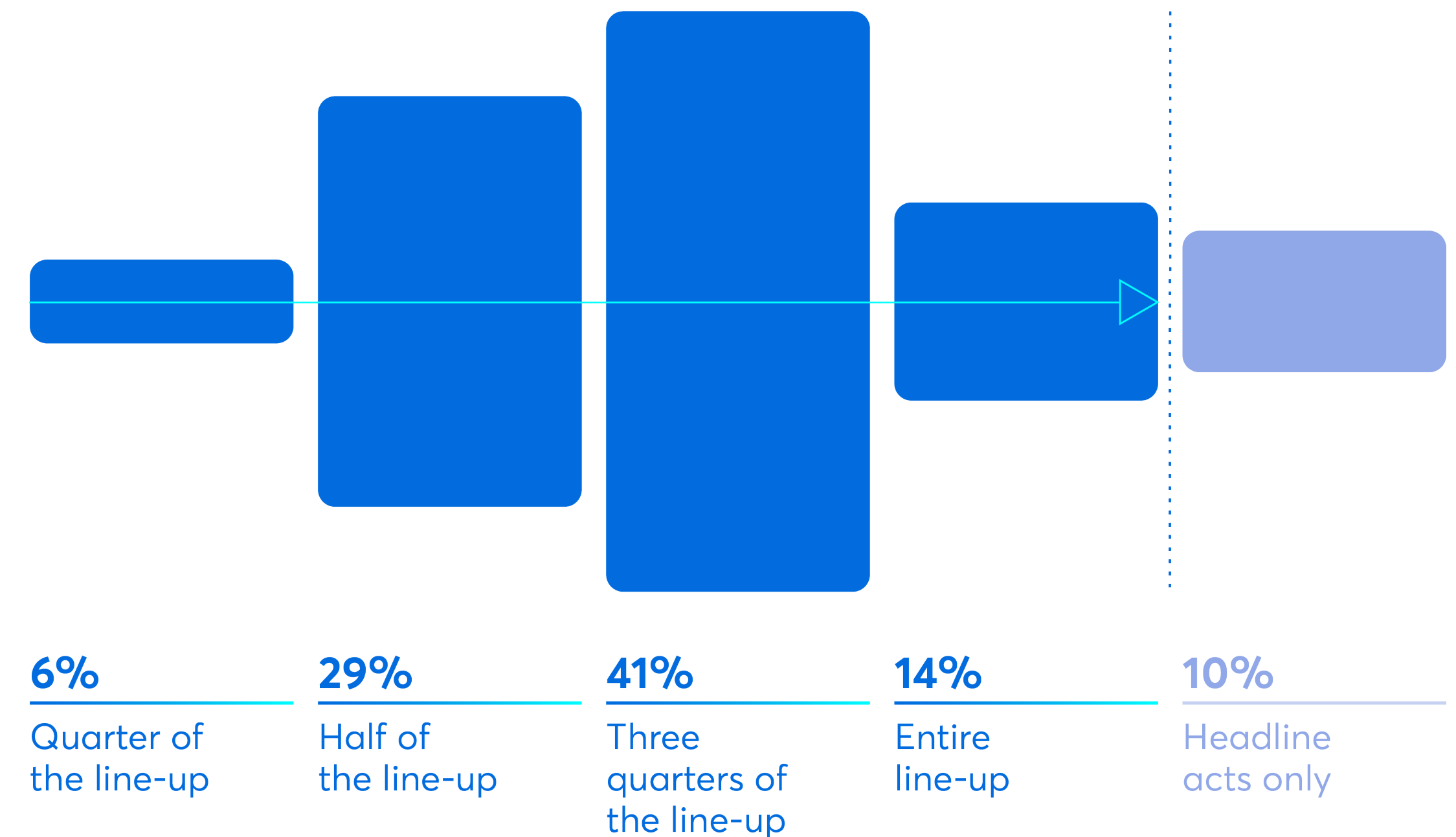
A mere 6% will book when less than a quarter of the line-up is announced. For one in ten fans though, headliners are all they are interested in.

The type of ticket also plays a part in determining whether a fan is

concerned with knowing who the headliners are. Those who purchase single-day tickets are more likely to be concerned with the headline acts, whereas three-day ticket buyers mostly buy only after the majority of the line-up is announced.

Interestingly, VIP ticket buyers are the least concerned with knowing the full line-up before booking, suggesting it's the full festival experience that drives them, rather than the music.

How far into the line-up announcement fans buy tickets
Base: Festival fans = 3,987



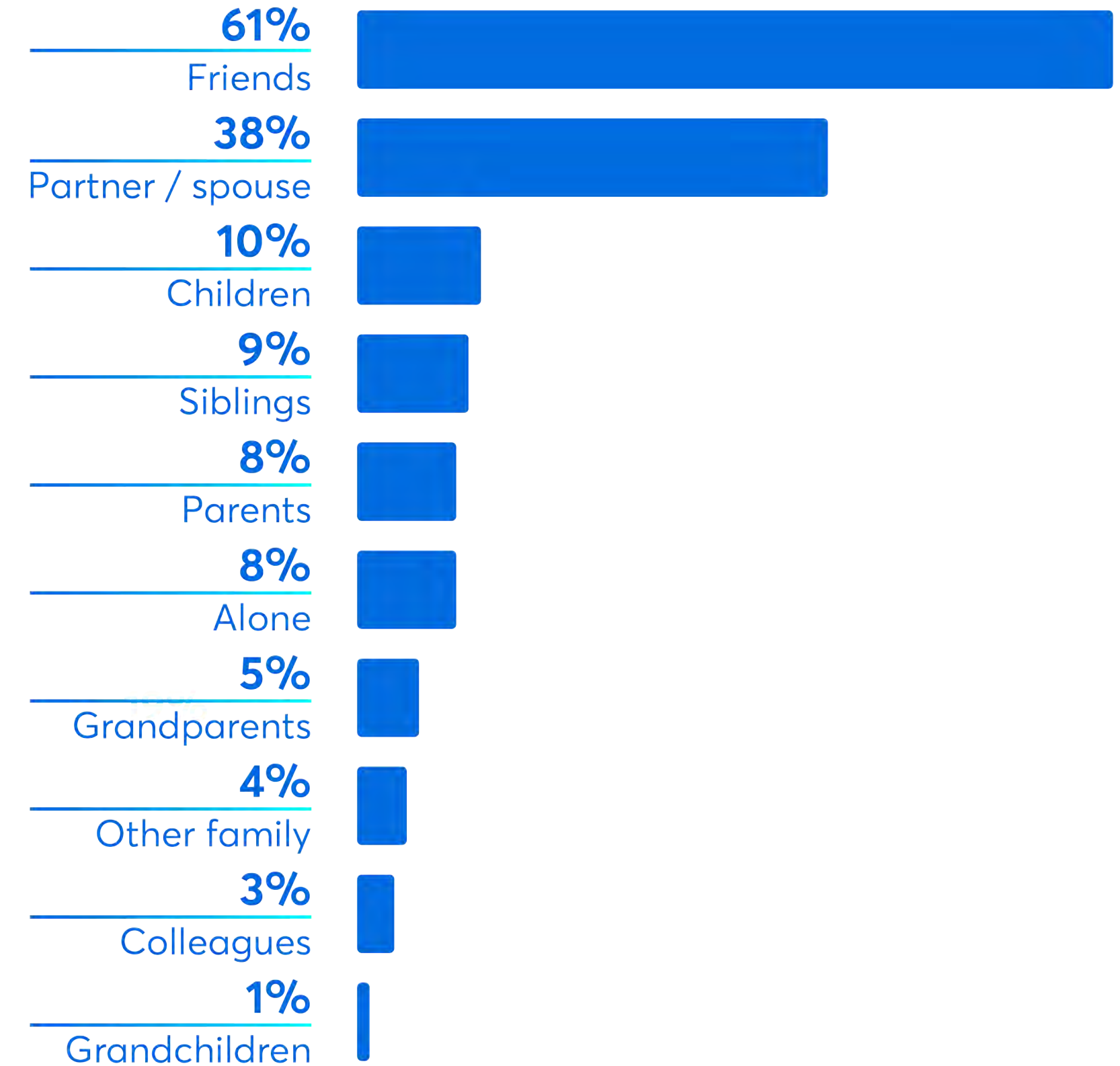
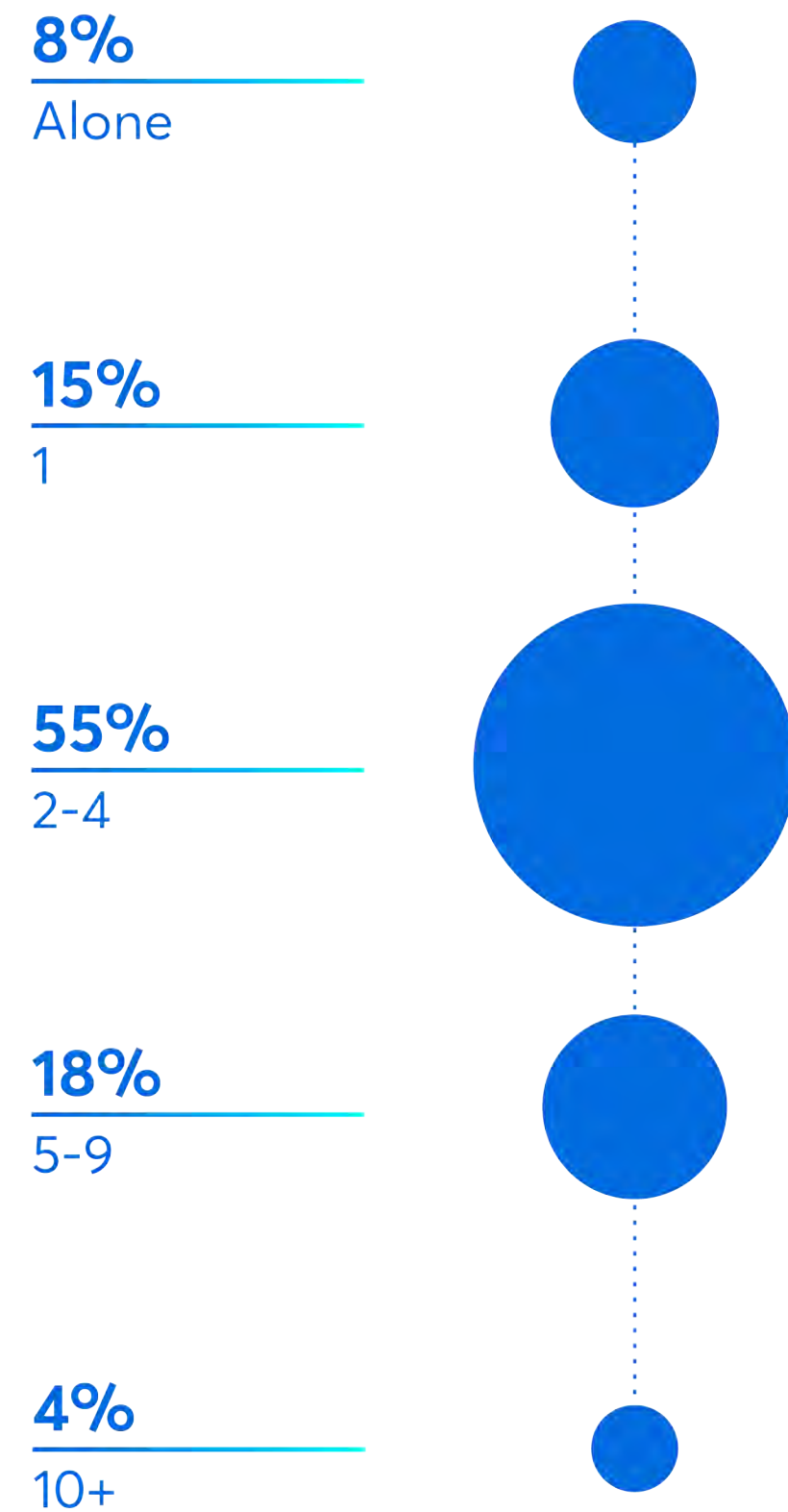
Who fans go to festivals with

Some fans are happy to fly solo at a festival, while 16% said that having no one to go with is a main barrier to attending. Nearly one in ten (8%) typically go to festivals alone, with 43% of buyers purchasing a single ticket.

That said, festivals are unsurprisingly a huge social occasion. The social aspect is particularly important for a quarter of festival fans - 22% attend festivals with five or more people. Most attend with their friends, but one in ten fans go with their kids and 5% even attend with their grandparents.

Our findings show that festivals bring out a lighter side to attendees too as over a quarter of festival-goers (28%) admit that they are more likely to socialise with their tent neighbours than the neighbours where they live.

Left: How many people fans usually attend with
 Right: Who fans usually attend with
 Base: Festival fans = 3,987



Travel and accommodation

The car is the number one mode of transport to a festival, though fans under the age of 35 are more likely to travel by train.

Modes of travel differ by region which is no surprise given the varied mix of inner-city and rural festivals available. The Welsh are the most likely to travel by car, whereas Londoners are most likely to travel by public transport.

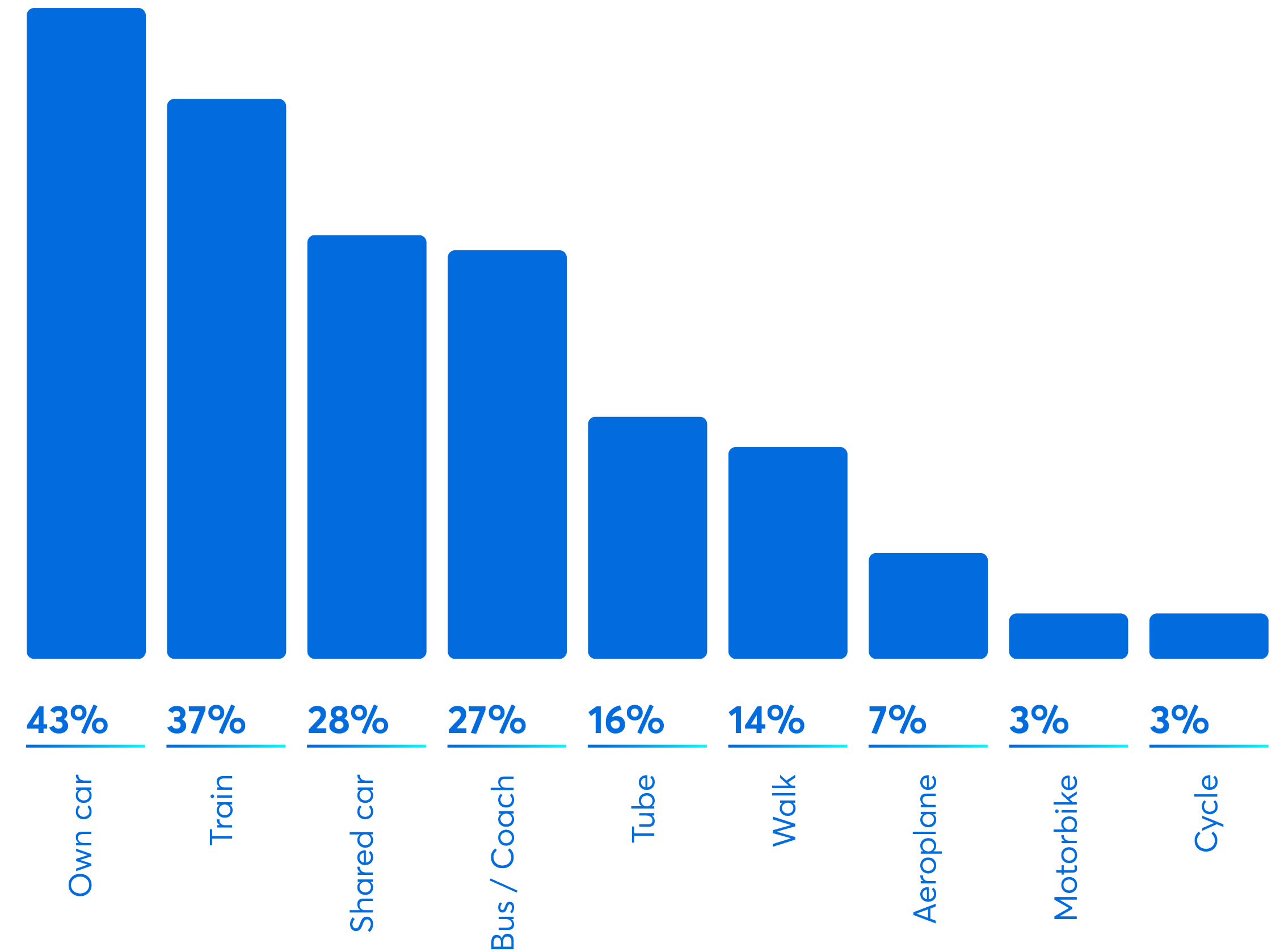
Showing that the festival campsite is the place to be, camping remains the top accommodation choice for fans (44%). However, those who aren't as

enthusiastic about camping are not deterred entirely with a third choosing to stay at a hotel, hostel or rental house, and 14% staying in their own home.

Even the most hardcore campers have to stop one day and as age increases, festival-goers shun the tents and are more likely to stay in either a hotel or rented house.

A third of people travel between 25-100 miles for a festival and only 4% travel over 200 miles.

How fans travel to a festival
Base: Festival fans = 3,987





Tickets

Pricing

Buying that ticket is when the festival experience truly begins. Our research shows that festival-goers are spending more money overall to make their summer festival experience one to remember.

But with so much choice, from one-day festivals to five-day bonanzas and more VIP options than ever to consider, what exactly are festival-goers choosing to spend their money on?

When we compared how much fans actually spend on tickets compared to what they would be willing to spend, we found a difference.

Festival-goers are willing to pay more for five-day, three-day and day festival tickets than what they are currently paying.

When it comes to VIP tickets though, our study shows that fans believe they are priced slightly higher than what they'd willingly spend.

Alongside tickets, fans are reportedly spending more on their overall festival experience than they were in 2012. Total spend has increased by £127.22 in that time, with most of this extra spend going on drinks (both on-site and off-site) and clothes. However, fans are spending less on travel and food than in previous years.

How much fans spend and are willing to spend on tickets
Base: Festival fans = 3987; 2018 festival customers



The VIP Experience

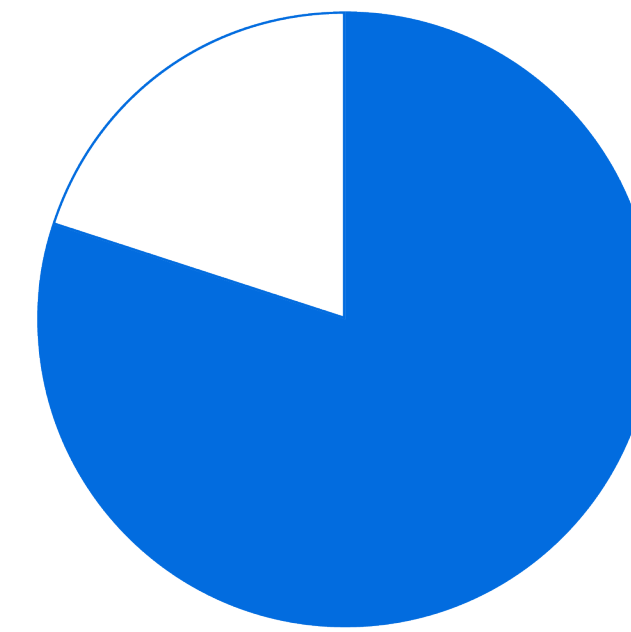
For those looking for a more exclusive experience, VIP tickets are now commonplace at the majority of UK festivals. Almost one in five (18%) are likely to purchase a VIP ticket. From luxury accommodation to premium access to facilities, VIP comes with a whole host of perks and is growing in popularity with fans.

The dreaded festival loo is something fans are keen to avoid – luxury toilets and access to a viewing area close to the stage come out as fans' favourite perks, with 80% saying they would spend more money for these.

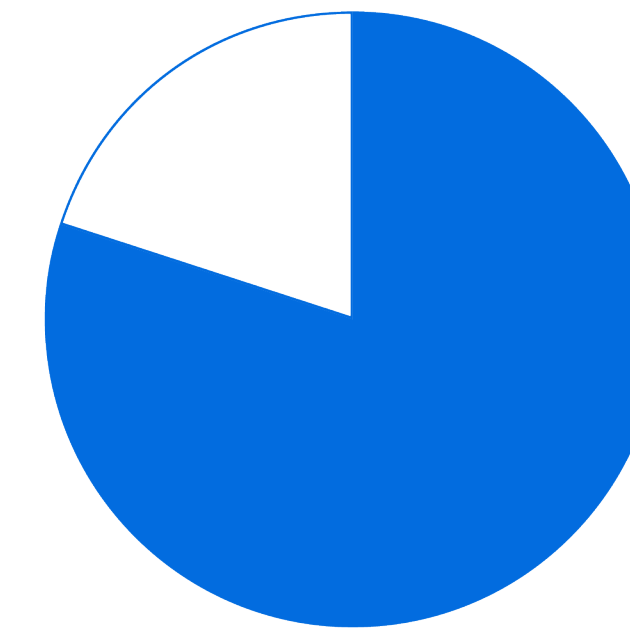
Those aged 20-44 years old are most likely to go VIP, with men rating themselves more likely to do so than women.

While VIP accommodation and access to a private lounge are two of the lowest rated options, those who wanted these perks are willing to spend the most to get them.

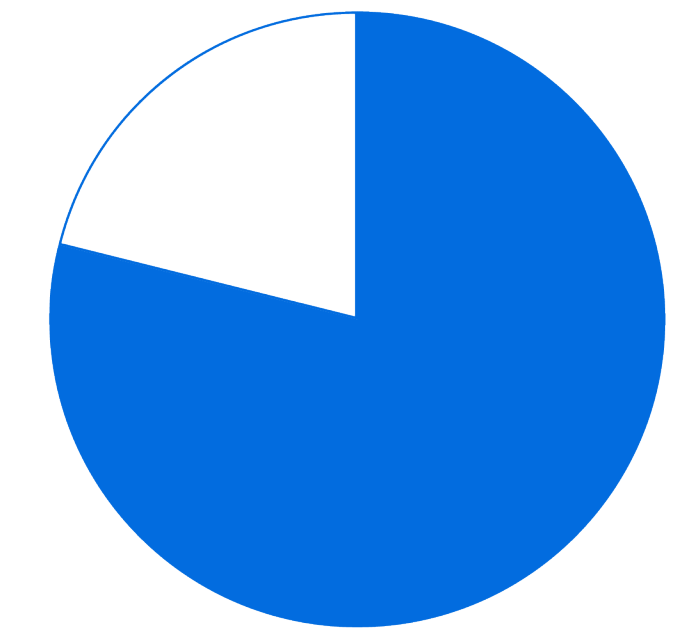
Percentage of fans who would pay extra for VIP luxuries
Base: Festival fans = 3,987



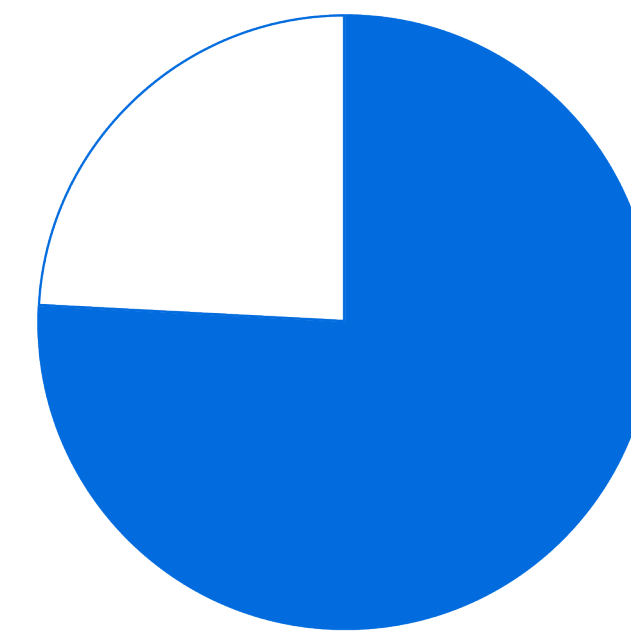
80%
Luxury toilets



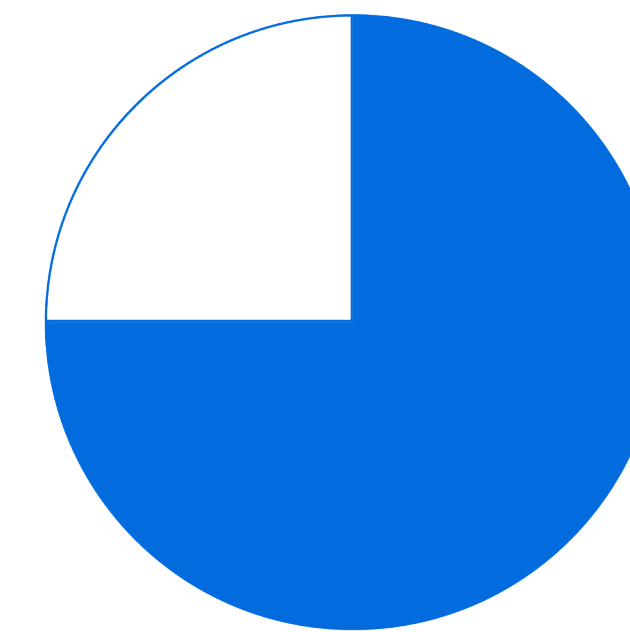
80%
Viewing area close to the stage



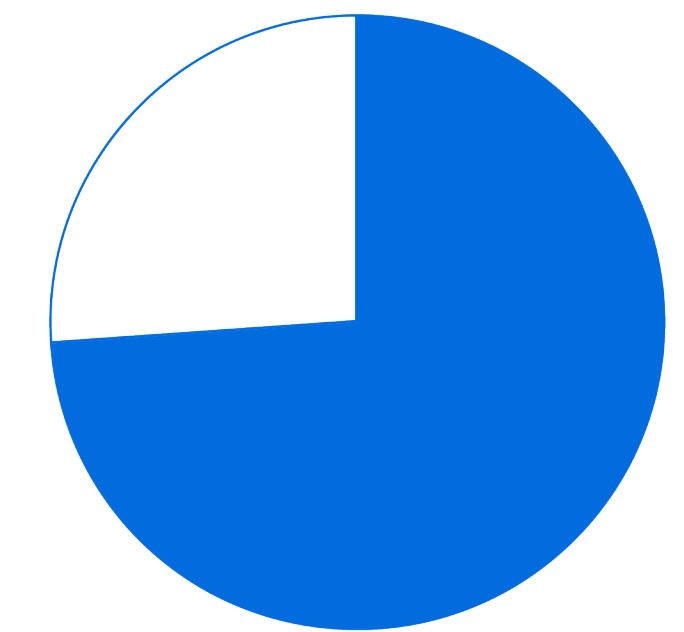
79%
Access to shower facilities



76%
VIP accommodation



75%
Private/fast track entry



74%
VIP lounge

Going digital

Digital tickets are becoming the norm in our everyday lives. From plane tickets to train tickets, consumers are familiar with purchasing and using tickets digitally.

So it's perhaps unsurprising that many festival-goers feel digital festival tickets come with a host of benefits, agreeing that they are eco-friendly (86%), convenient (86%), secure (85%) and reliable (83%.)

Interestingly, those under the age of 34 and those who book their tickets early are more likely to prefer digital tickets.



Attending



Sustainability

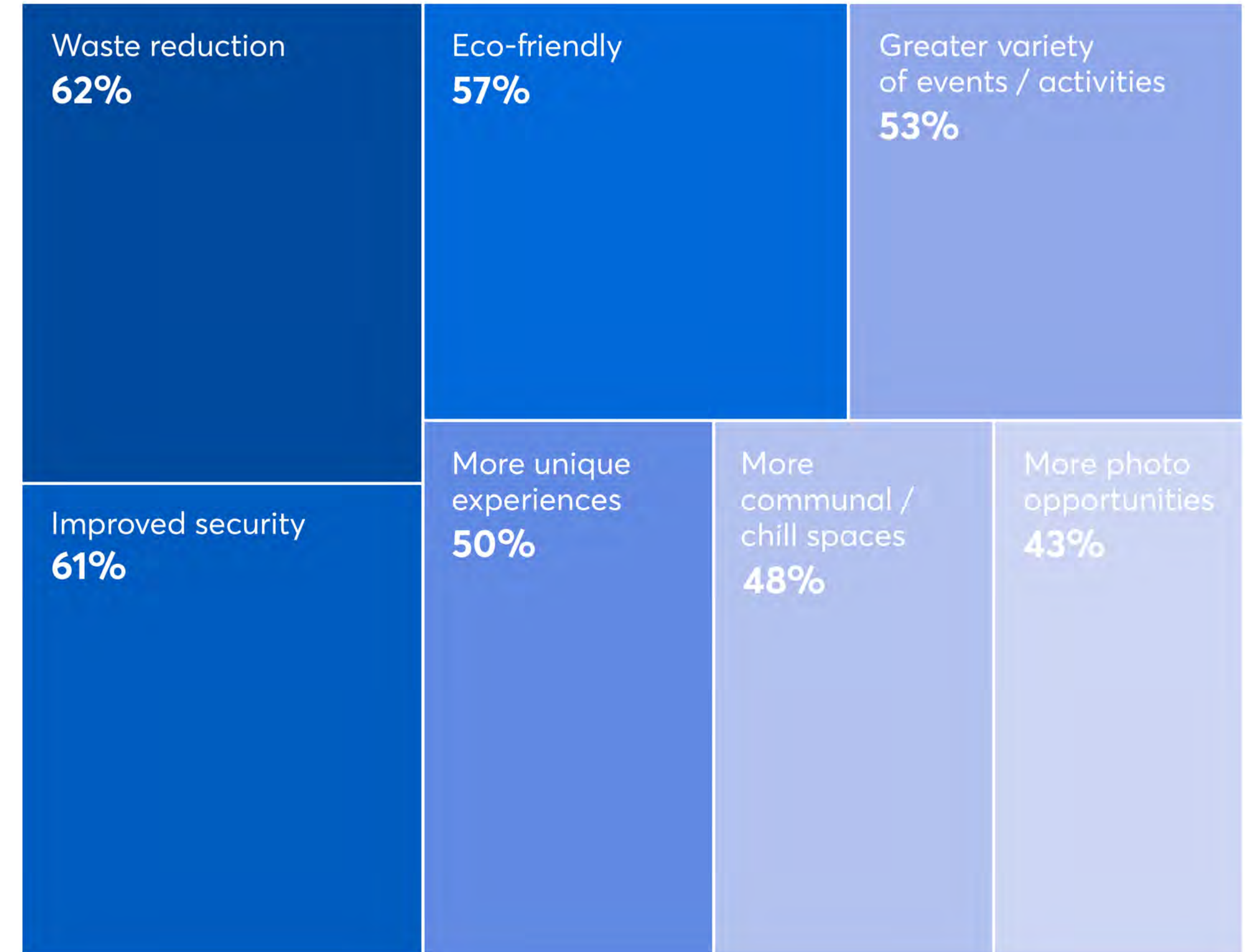
After months of anticipation, thousands of fans descend upon sites across the country as festival season rolls around.

The unique festival vibe, a chance for escapism and sensational line-up are all important reasons why fans turn up in their numbers each year, not to mention the ever-increasing food options.

But festival-goers are also more socially and environmentally conscious than ever, and our study shows that fans are asking more of festival organisers to reflect this.

From more eco-friendly initiatives to better representation in line-ups and improved accessibility, festival-goers are increasingly conscious of their wider societal responsibilities and are beginning to actively seek out events that align with their values. Nearly two in three would like to see reduced waste at a festival, and a similar amount would like to see more eco-friendly initiatives.

Initiatives fans want from festivals
Base: Festival fans = 3,987



Recycling

While fans are placing greater importance on environmental initiatives – scoring it their top priority in terms of sustainability initiatives – our study conversely shows that over a third have left behind a tent at a festival before, with 36% saying they believe tents will be recycled. In fact, fans who think tents are recycled are four times more likely to leave their tents behind.



Line-up diversity

29% feel there is not enough diversity in festival line-ups, with 47% wanting better gender representation among artists appearing. Three in ten (29%) also say that the gender balance of line-ups is something they actively consider when choosing a festival to attend.

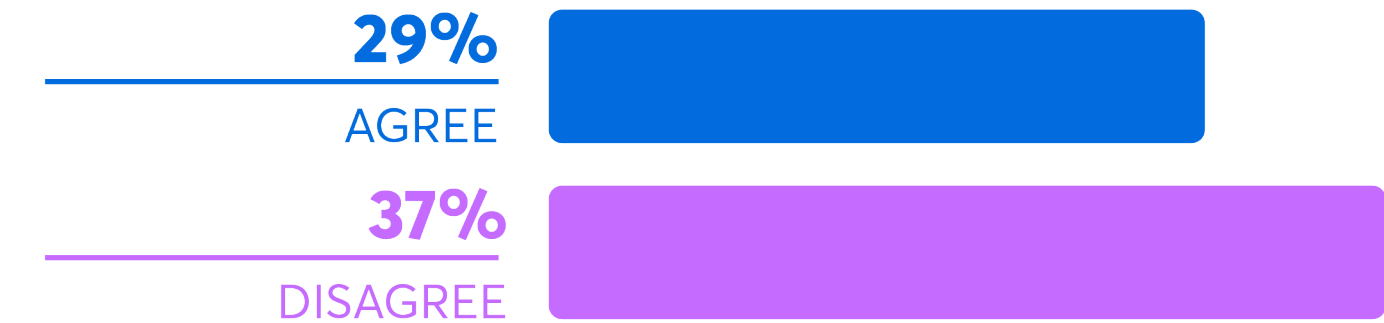
It's the younger fans who are more likely to demand greater diversity of talent, with 46% of those aged under 34 wanting more.

Gender diversity at festivals
Base: Festival fans = 3,987

Diversity in line-ups has improved over the years



There is not enough diversity on festival line-ups



Festival organisers have the responsibility to ensure their festival line-ups are as diverse as possible



A gender balanced line-up is something I consider when choosing which festival to attend



Accessibility

One in ten have attended a festival as someone with a disability, and a further 18% have attended with someone who has a disability.

Fans with accessibility needs are most satisfied with the ease of purchasing a ticket (66%) and the overall experience (66%) at festivals. The lowest satisfaction score goes to toilets (55%) and availability of information on the day (57%).

Of everyone surveyed, one in ten people said they do not attend festivals because of accessibility issues. This statistic was highest for those under 34, with 16% saying it is their main barrier to attending festivals.



Food and drink

Food and drink are essential parts of the festival experience, with many hosting a vast range of food trucks, stalls and bar options. Indeed, over a third of people say that food is a consideration for them when choosing a festival in the first place.

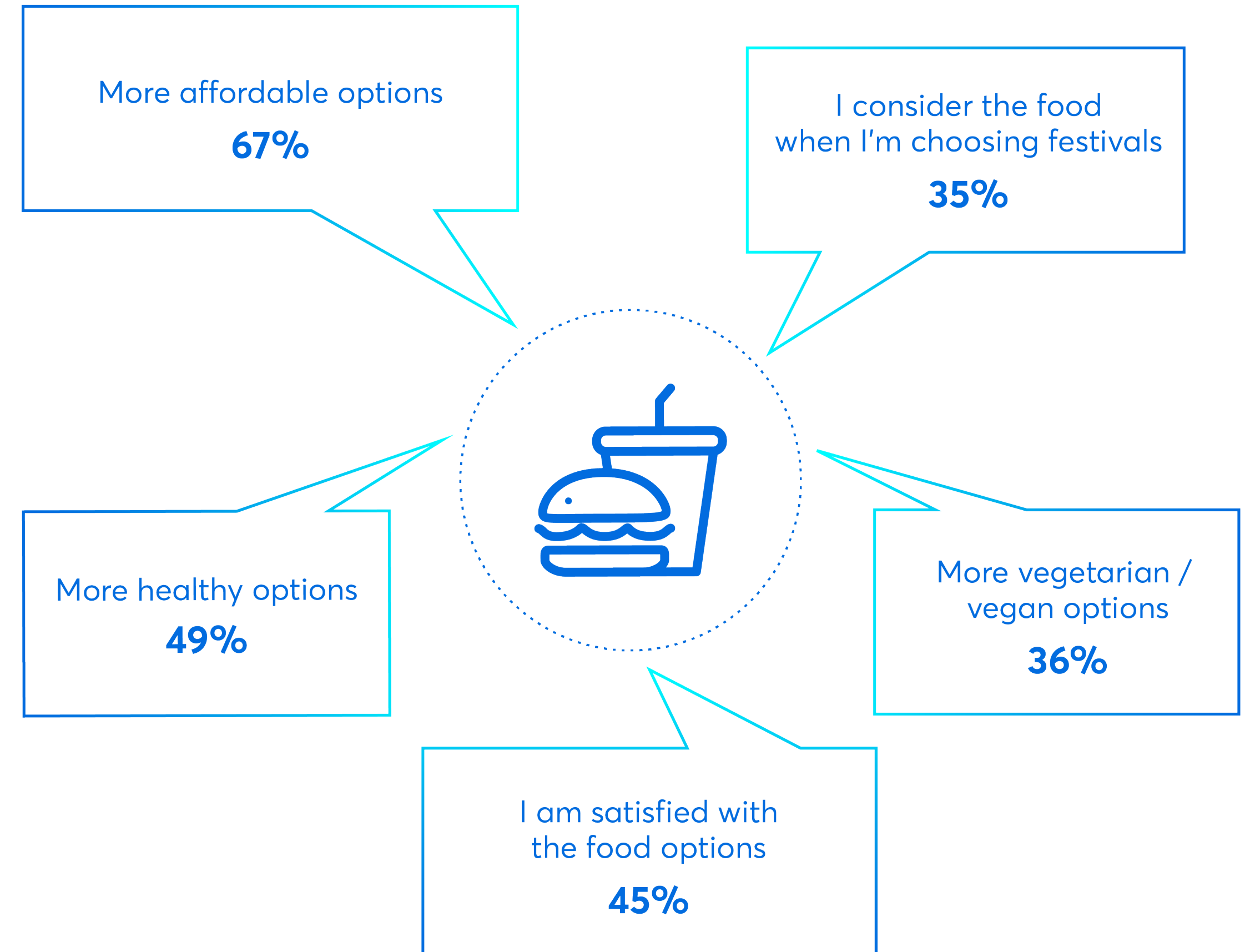
Two thirds want to see more affordable food options at festivals, with half after more healthy options. One in three are looking for more vegetarian and vegan vendors.

While festivals have traditionally been seen as places where fans go to let loose, the findings show that festival-goers are drinking less. Teetotal Brits

now account for a substantial amount of festival-goers, with three in ten preferring non-alcoholic drinks. 25% said they drink more than ten units in a festival day (that's five pints), compared to 30% in 2012.

On average, fans spend around £80 on drinks at a festival, with VIP ticket holders spending the most of anyone. Beer remains the tipple of choice for 25% of fans, followed by cider (12%) and water (11%).

Preferences for food at festivals
Base: Festival fans = 3,987



Opportunities

VILLAGE

SOUTHWOLD 3.5 MILES

Solas

KIDS & INBETWEEN
TEEN AREA

THE SPEAKEAS

Pandora's Playgr

Cabaret

LAKE WIMMI

ATURE

Music discovery

One thing is clear – festivals are as popular as ever and have a huge influence on the UK music scene, attracting hundreds of thousands of revellers each year.

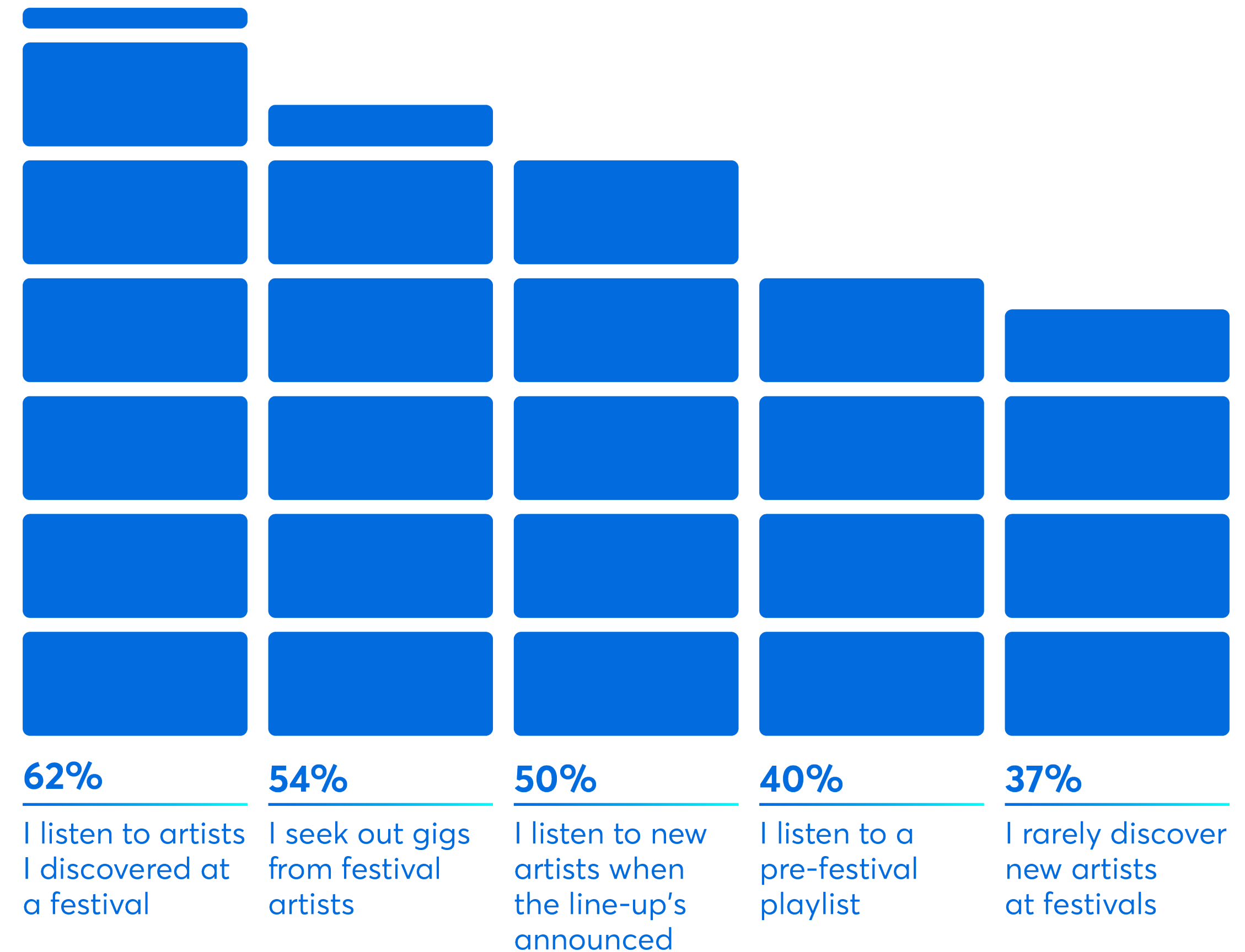
But what stops everyone from enjoying a good festival? This chapter also examines the barriers that keep music fans from buying a ticket, whether it's because they feel too old or simply because they have no one to go with.

Nearly two in three fans discover new artists at a festival, and go on to listen to them long after. Even line-up announcements impact music trends, with half of festival-goers starting to listen to music from these artists before the festival begins.

Beyond streaming, festivals can help to attract new audiences to gigs. Over half (54%) of festival-goers seek out gigs for an artist they discovered at a festival.

As streaming becomes ever more popular, pre-festival playlists are becoming a festival staple and a significant source for discovering new music. Two-fifths of fans (40%) say they listen to curated playlists before attending a festival with research from Spotify¹ showing that streams for artists notably increase before and after festival appearances.

Streaming habits before and after a festival
Base: Festival fans = 3,987



Sponsors

The opportunities for brands to connect with consumers at festivals are vast.

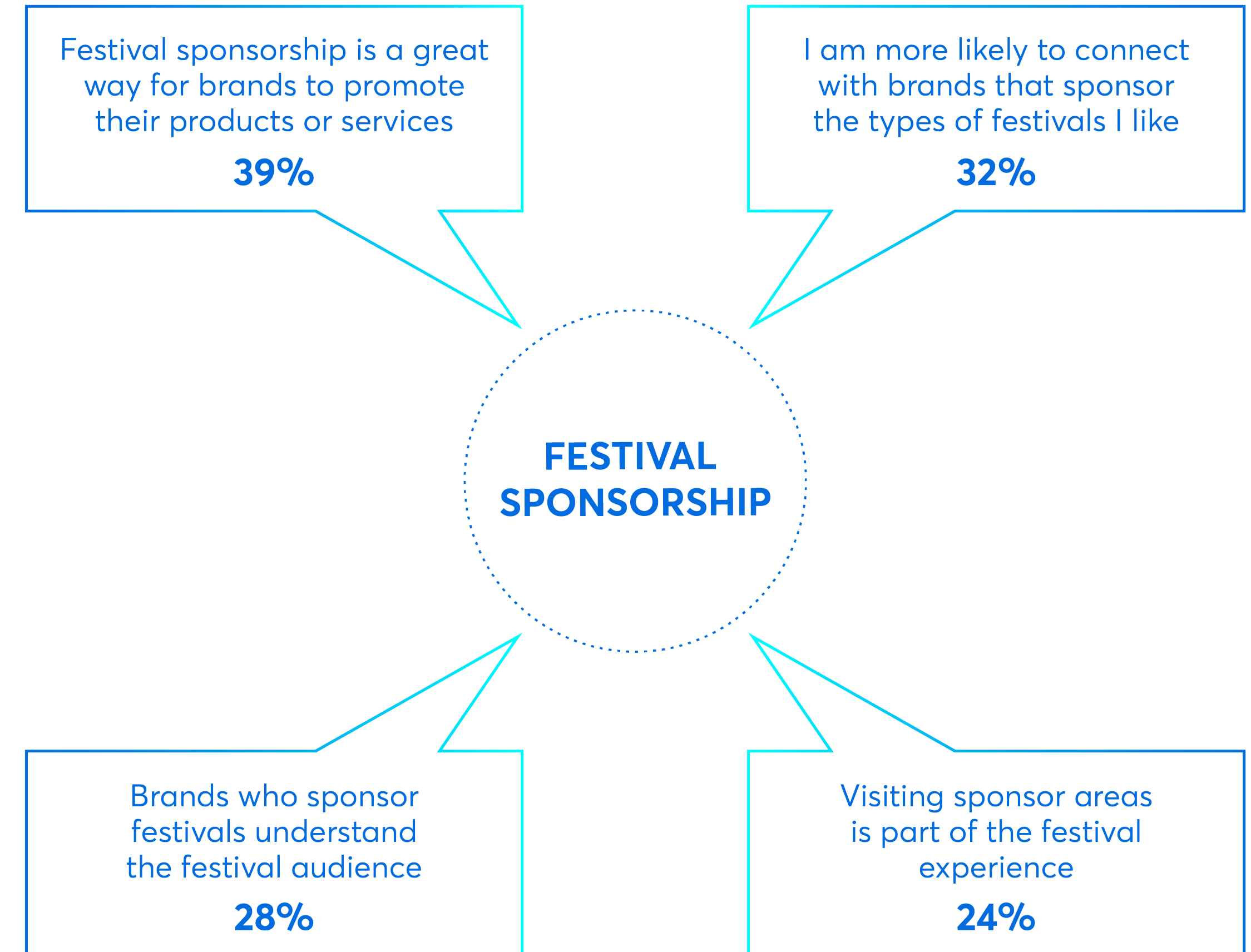
It's encouraging to see that there is openness amongst festival-goers to engage with sponsors. Despite the majority being neutral towards sponsors, two in five believe that sponsorship is a great way for brands to promote their products and services, with 24% going as far as to say that visiting sponsor areas are an important part of the experience.

When comparing city and rural festivals, those attending a city

festival are more likely to engage with sponsors. Fans of large urban music festivals also appear to be more positive towards sponsors, compared to those who attend indie, pop, or rock festivals.

Brands can reach a wide cross section of fans, with two in three people visiting at least one sponsor activation during a festival. Our data highlights that age does not impact on those most likely to engage with sponsors.

Fans' attitudes towards festival sponsorship
Base: Festival fans = 3,987



What fans want from a sponsor

Perhaps unsurprisingly, free giveaways come out on top as the best way for sponsors to engage fans, with over half of festival-goers (51%) keen on a freebie. This is followed by information that makes the experience smoother (44%) and providing information prior to the festival to help them plan their day (41%).

More socially-conscious fans, however, are demanding more from sponsors, asking them to prove their worth as a force for good. Under 24s are the most likely to find creating charitable aspects the most appealing.

Fast-food (55%) and personal care brands (51%) are the most suitable sponsor brands for festivals, while automotive (36%) and finance (32%) companies the least.

Fashion is the second most suitable sponsor type for the under 24 year olds (overall 5th for other age groups). This age group also spend the most on average on clothes for a festival.



What stops people from going?

Festivals are not for everyone, but our findings show there is an untapped audience who are willing to attend but are put off from doing so by certain barriers.

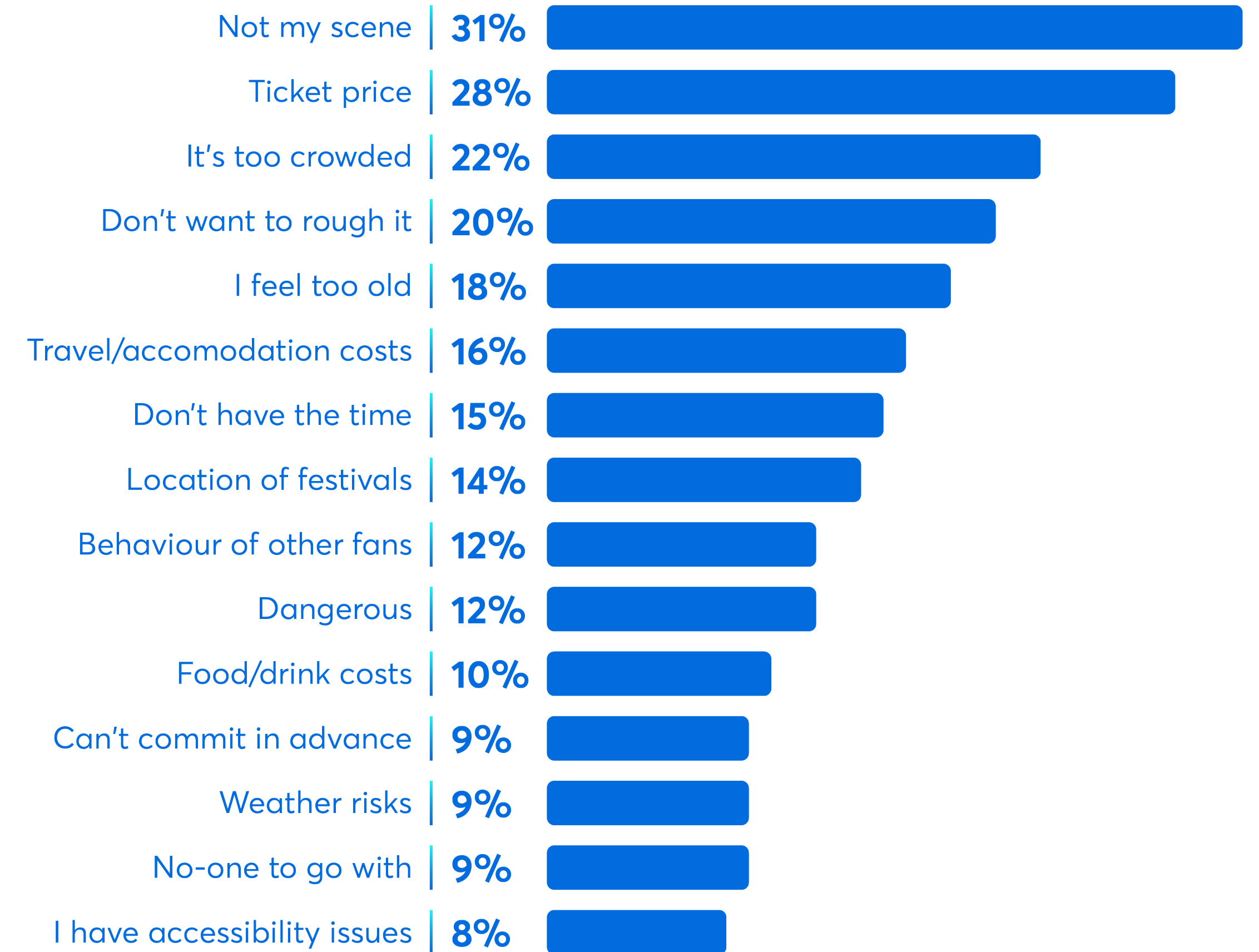
With three in ten (31%) saying they don't attend a festival as it is simply not their scene, it is unlikely to see them attending any time soon. Over a quarter (28%) say the ticket price deters them, and over a fifth (22%) feel that festivals are too crowded.

Festivals that are too far away geographically proved to be the biggest barrier for younger festival-goers (16-19 year olds), while older

age groups are more likely to find fan behaviour, the idea of roughing it and feeling too old as the most off-putting factors.

Cost is the biggest barrier to attending multiple festivals, particularly for younger audiences. There is a clear appetite amongst 16-19 year olds to attend more festivals, but not having someone to attend with is a huge barrier for this age group.

Barriers for people who don't attend festivals (top 15)
Base: Non-festival attendees = 6,930



APPENDIX



Methodology

Ticketmaster partnered with Kantar to get a representative sample of the UK population, through an online survey that was fielded in April 2019. Following a thorough cleansing and weighting process, a total of 10,901 responses qualified as complete and representative responses. 3987 of them passed our screener (having attended at least one music festival since 2016) and were defined as festival fans therefore informing the majority of our report.

Included are some trends from Ticketmaster's database customers who purchased at least one festival ticket from 2009 to 2018/19. In addition, data was analysed from 12 Live Nation festival apps from 2018, which included over 8 million data points.

Please note that mentions of "festival customers" refer to Ticketmaster customers who have purchased at least one ticket to a festival. Mentions of "festival fans" are referring to respondents to the survey that was answered by a sample of the UK population and who self-identified as festival attendees within the past 3 years.

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Aranxa Esteve (p10)	Yvette de Wit (p34)





Research

Analysis | Sophia Rawcliffe
Additional analysis | Tom Rea
Additional analysis | Zoltan Fodroczi

Design

Infographics & Layout | Grazia Trisciuoglio

Author

Ticketmaster

With thanks to

Sarah Slater
Rebecca Lotts
Katie Roberts
Mel Perrétt
Mollie Nock
Tina Mermiri
Louise Baillie

ticketmaster