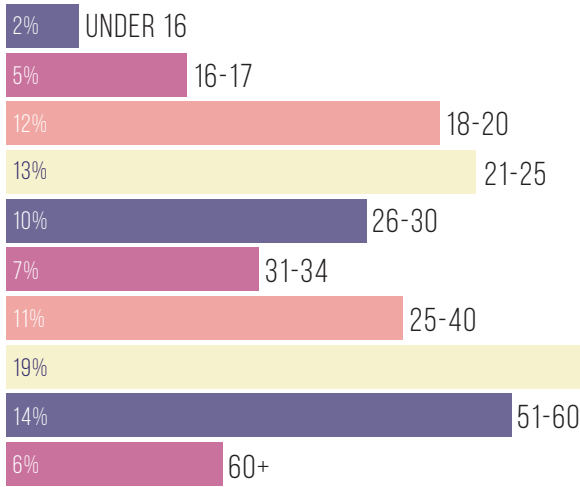




MARKET REPORT 2018

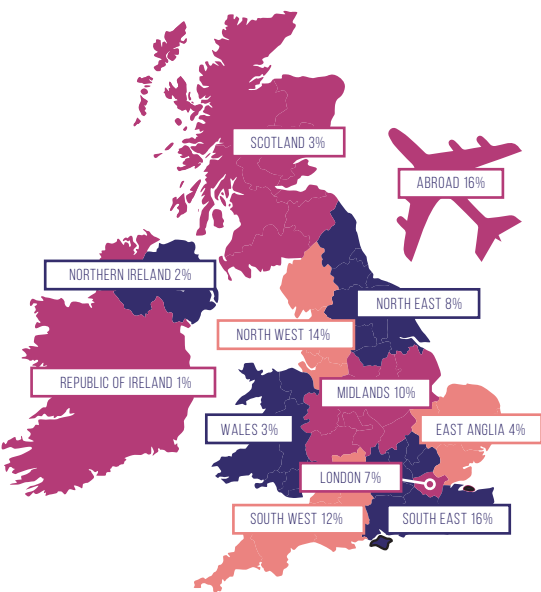
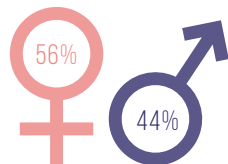
MEET THE FESTIVAL-GOERS...

AGE



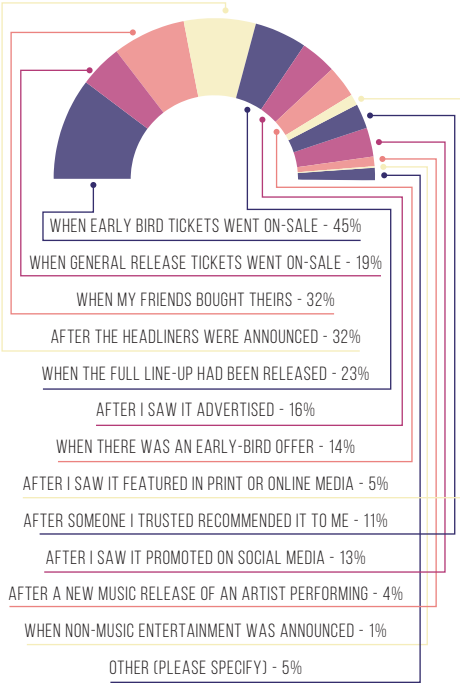
41% OF FESTIVAL GOERS ATTEND 6-20 GIGS PER YEAR

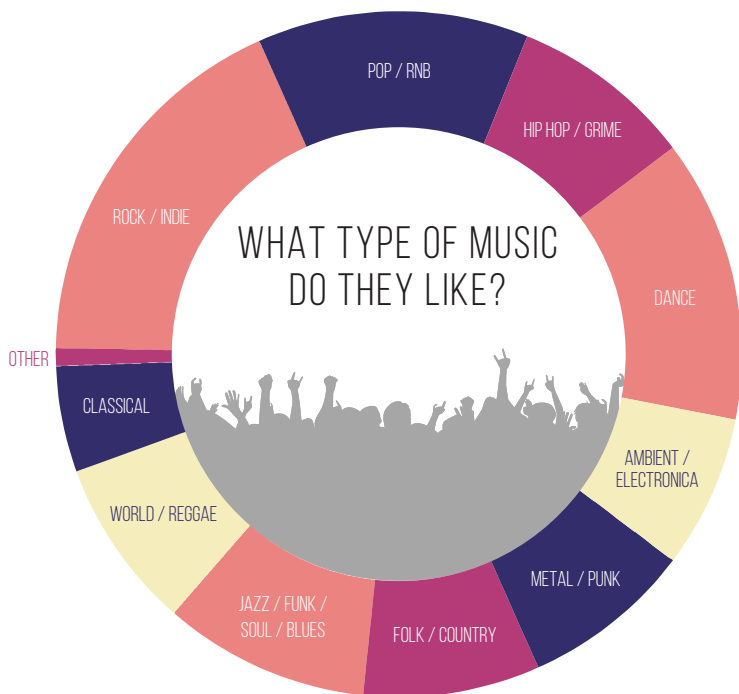
GENDER



WHERE THEY LIVE

WHEN THEY BOUGHT TICKETS





FESTIVAL TICKET PRICES...



GOOD VALUE FOR MONEY
20%



THEY'RE ABOUT RIGHT
55%



OVERPRICED FOR WHAT THEY DELIVER
25%

THEY BOUGHT THEIR FESTIVAL TICKETS...



45%
WHEN EARLY BIRD TICKETS WENT ON-SALE



32%
WHEN FRIENDS BOUGHT THEIRS



32%
AFTER THE HEADLINERS HAD BEEN ANNOUNCED



23%
WHEN THE FULL LINE-UP HAD BEEN RELEASED

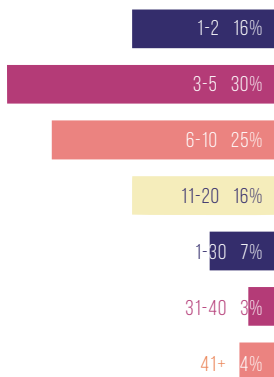


19%
WHEN GENERAL RELEASE TICKETS WENT ON-SALE

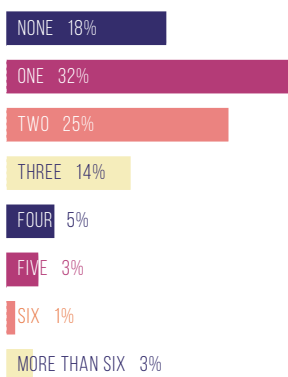


16%
AFTER THEY SAW IT ADVERTISED

HOW MANY GIGS DO THEY ATTEND PER YEAR?

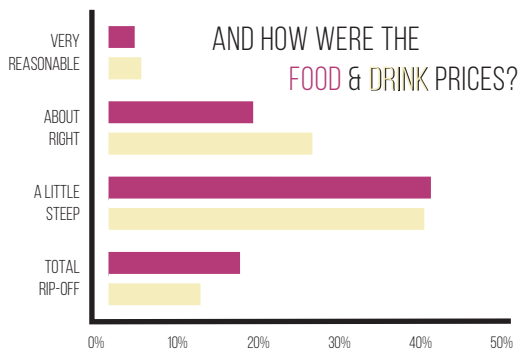
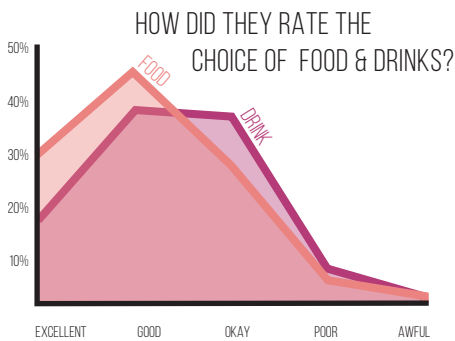


HOW MANY FESTIVALS DID THEY ATTEND THIS YEAR?

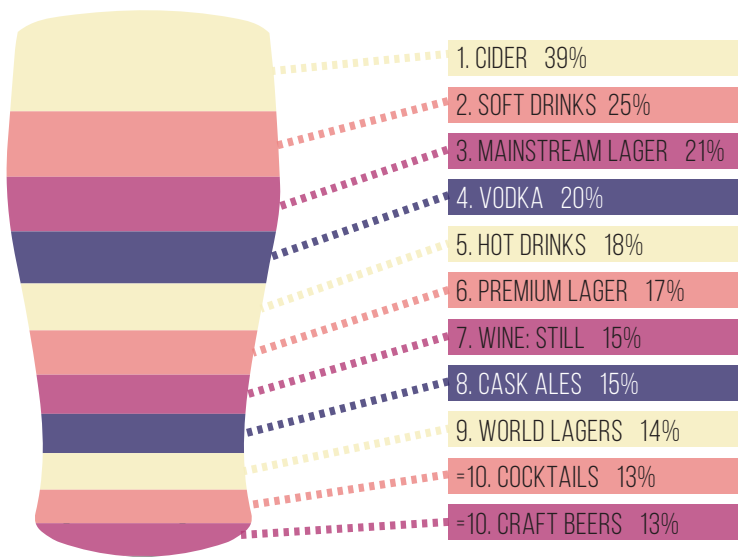


HOW FAR IN ADVANCE DID THEY BUY TICKETS?

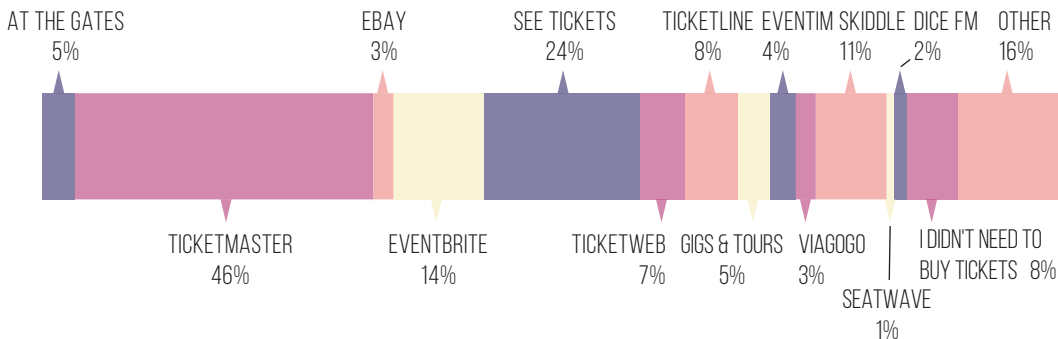




TOP 10 DRINK TYPES PURCHASED AT FESTIVALS

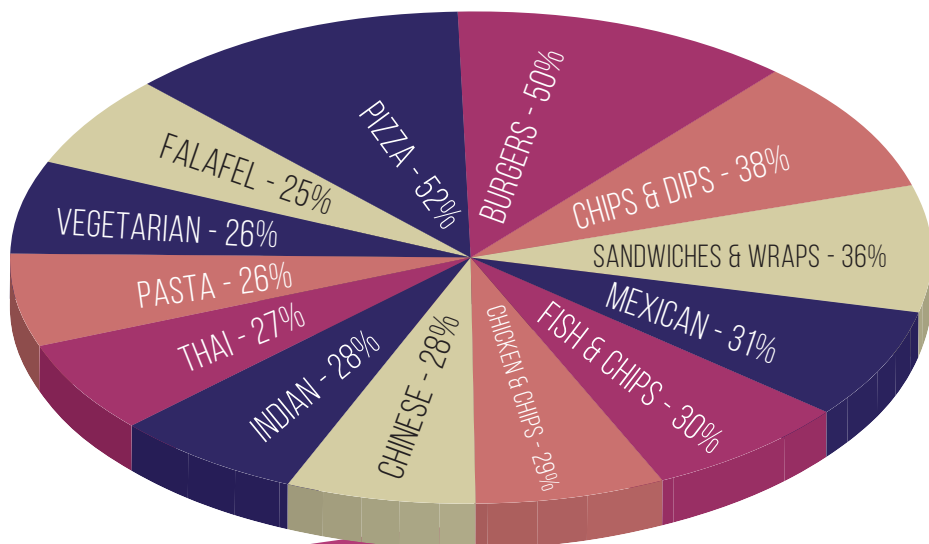


WHERE DID THEY BUY YOUR FESTIVAL TICKETS?



TOP 12 FOOD TYPES PURCHASED AT FESTIVALS

WITH PIZZAS AND BURGERS BEING THE MAIN CONTENDERS



THE OVERALL LINE-UP

was
most
WHEN
festivals

CONSIDERED
IMPORTANT
Choosing
TO

THE
element
WHICH
ATTEND



PREVIOUS EXPERIENCE
AT THE SAME EVENT

HEADLINERS

THE PRICE OF
TICKETS

43%

OF FESTIVAL GOERS THOUGHT THE OVERALL LINE-UP WAS A MAJOR FACTOR TO CONSIDER WHEN CHOOSING WHICH FESTIVAL TO ATTEND, COMPARED TO 32% WHO THOUGHT THE HEADLINERS WAS A MAJOR FACTOR.

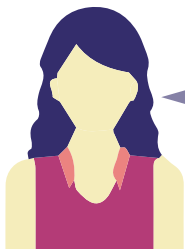


CAR SHARING WAS THE MOST POPULAR MODE OF TRANSPORT TO FESTIVALS, WITH 63% TRAVELING THIS WAY.

THE MAIN METHODS OF PAYMENT USED AT FESTIVALS THIS YEAR

- 01 CASH - USING MONEY I BROUGHT WITH ME
- 02 CASH - WITHDRAWN FROM A FESTIVAL ATM
- 03 CREDIT OR DEBIT CARD
- 04 MOBILE PHONE PAYMENT
- 05 CASHLESS WRISTBAND / PRE-LOADED CARD
- 06 TOKENS PURCHASED WITH CASH OR CARD

57% OF FESTIVAL GOERS PREFERRED TO USE CASH THEY'D BROUGHT WITH THEM

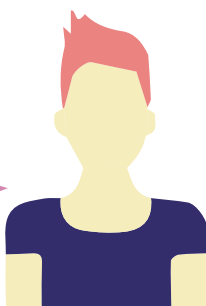


"AT A FAMILY FESTIVAL IT WOULD BE GREAT TO HAVE FAMILY FRIENDLY MEAL DEALS. IT WOULDN'T HAVE BEEN ABNORMAL FOR OUR FAMILY MEAL WITH DRINKS TO TOP THE £40 MARK AT THE FESTIVAL WE WENT TO, AND FOR A 2 DAY FESTIVAL IT BECOMES EXTORTIONATE ON TOP OF THE HOT CHOCOLATES, COFFEES, PANCAKES, ICE-CREAM, SLUSHIES"

WHAT WOULD MOST IMPROVE A FESTIVAL?



QUEUING TO GET IN FESTIVALS AND QUEUING AT BARS IS LONG, AND FRUSTRATING! EE -EASTERN ELECTRICS WAS AMAZING USING MORE LOADED WRISTBANDS AS THE QUEUES WENT DOWN SO QUICKLY!



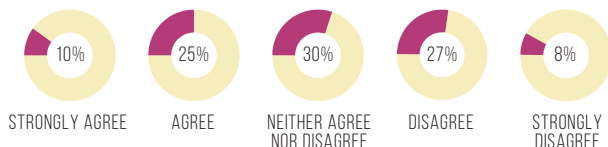
BIGGER
OR SMALLER?

18%

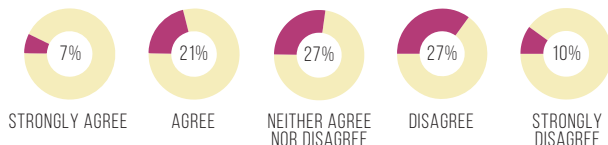
OF PEOPLE PREFERRED A SMALLER FESTIVAL OF 5,000 TO 10,000 PEOPLE. ONLY 2% PREFERRED THE CROWDS OF A BIGGER FESTIVAL (75,000 AND ABOVE). HOWEVER, MOST PEOPLE (28%) DIDN'T MIND HOW BIG OR SMALL THE FESTIVAL WAS.

AGREE? ✓ OR DISAGREE? ✗

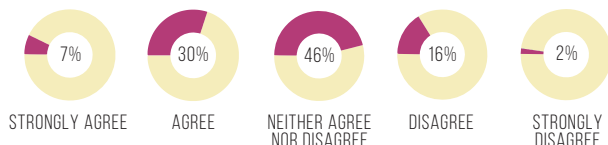
"ONE ACT CAN MAKE OR BREAK A FESTIVAL"



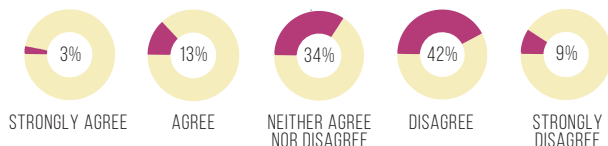
"IF A FESTIVAL DOESN'T HAVE GOOD HEADLINERS IT ISN'T WORTH ATTENDING"



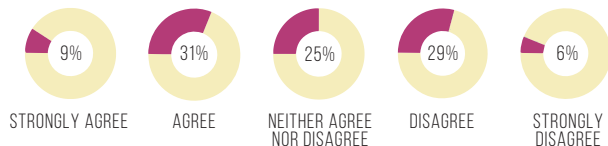
"I PREFER DISCOVERING NEWER ACTS THAN WATCHING ESTABLISHED ACTS AT FESTIVALS"



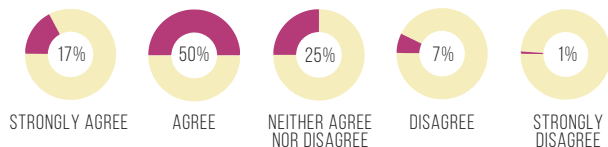
"I WOULD PREFER FESTIVALS TO HAVE FEWER ACTS AND LOWER TICKET PRICES"



"IF THE LINE-UP OF A FESTIVAL DOES NOT INCLUDE FAMILIAR ACTS I WON'T CONSIDER ATTENDING"



"THE PRODUCTION QUALITY (E.G. SOUND, LIGHTING, SPECIAL EFFECTS) IS COMPARABLE TO THE QUALITY OF ACTS IN MY RATING OF A FESTIVAL"



THE THINGS PEOPLE LOVED MOST ABOUT FESTIVALS



1. THE MUSIC (52%)

2. THE SENSE OF ESCAPISM (23%)

3. HANGING OUT WITH MY FRIENDS (17%)

4. MEETING NEW PEOPLE (6%)

5. 'ROUGHING IT' WITHOUT SHOWERS OR CLEAN TOILETS (7%)

4. QUEUES AND OVERCROWDING (10%)

3. BANDS CLASHING ON THE RUNNING ORDER (11%)

2. THE PRICE OF FOOD AND DRINK ONSITE (12%)

1. WET AND MUDDY CONDITIONS (14%)

... AND THEIR BIGGEST DOWNERS





56%

OF PEOPLE THOUGHT THAT THAT FESTIVAL ORGANISERS MADE SUFFICIENT PROVISIONS FOR ALL POTENTIAL WEATHER CONDITIONS...



26%

OF PEOPLE DIDN'T ENOUGH PROVISIONS WERE MADE

"ALL FESTIVALS SHOULD PROVIDE MORE COVERED EATING AREAS, IT IS VERY UNCOMFORTABLE TO TRY AND EAT WHEN IT IS RAINING ON BOTH YOU AND YOUR FOOD."

WHAT WOULD PUT THEM OFF ATTENDING A FESTIVAL NEXT YEAR?

NONE OF THEM WOULD PUT ME OFF - 20%

WEATHER - 6%

A DIFFERENT LOCATION, SAME DISTANCE FROM YOUR HOME - 3%

LESS HIGH PROFILE HEADLINE ARTISTS THAN I EXPECTED - 20%

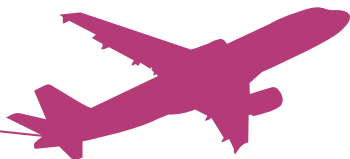
5% INCREASE IN THE TICKET PRICE FROM LAST YEAR - 26%

5% INCREASE IN THE PRICE OF ALCOHOL FROM LAST YEAR - 4%

FEWER ACTS / STAGES THAN I EXPECTED - 23%



12% HAVE GONE TO FESTIVAL ABROAD THIS YEAR



26% ADMITTED TO TAKING ILLICIT DRUGS AT A FESTIVAL

48% OF PEOPLE ACCEPT THAT FESTIVALS NEED BRAND SPONSORSHIP BUT IT DIDN'T IMPROVE THEIR ENJOYMENT

31% OF PEOPLE REMEMBERED SPONSORS FROM THE FESTIVALS THEY ATTENDED

18% THOUGHT A SPONSORED BAR, AREA OR ACTIVATION ADDED TO THEIR FESTIVAL EXPERIENCE

HOW CONCERNED WERE THEY ABOUT SAFETY?



VERY CONCERNED - 7%



SLIGHTLY CONCERNED - 25%



NOT PARTICULARLY CONCERNED - 37%

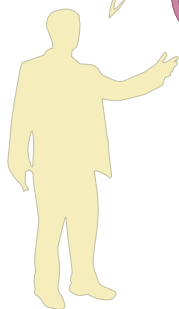


NOT AT ALL CONCERNED - 24%

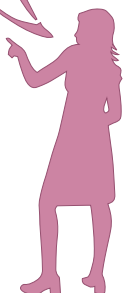


I HAVEN'T EVEN THOUGHT ABOUT IT - 7%

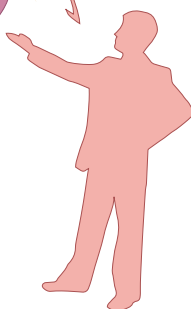
RECENTLY, FESTIVALS HAVE BEGUN TO OFFER FREE DRUG TESTING FACILITIES ON-SITE. WHAT ARE YOUR THOUGHTS ON THIS?



IT'S A GOOD IDEA. PEOPLE WILL DO DRUGS AT FESTIVALS - BETTER TO HAVE THEM DO SO IN A WAY THAT IS AS SAFE AS POSSIBLE. AT LEAST THESE FACILITIES MIGHT PREVENT SOMETHING AWFUL HAPPENING AND FREE UP MEDICAL STAFF ON SITE.



I THINK IT'S A GREAT IDEA. PEOPLE ARE GOING TO TAKE DRUGS ANYWAY. THE ORGANISERS SHOULD PROVIDE FACILITIES SO THAT PEOPLE GOING CAN TEST WHAT THEY'RE TAKING. AND EVIDENCE POINTS THAT IF IT ISN'T WHAT THEY THOUGHT IT WAS THEY GET RID OF IT



I THINK THIS IS AN EXTREMELY GOOD IDEA. FOR A LOT OF PEOPLE, FESTIVALS ARE A WEEKEND TO EXPERIMENT AWAY FROM PARENTS WITH LITTLE REPRODUCTION, AND NO MATTER HOW HARD FESTIVALS TRY THIS ISN'T GOING TO CHANGE. SNIFFER DOGS, HIGH SECURITY AND SEARCHES IS A WASTE OF MONEY AS PEOPLE ARE ALWAYS GOING TO FIND A WAY TO GET DRUGS ON SITE. THEREFORE BECAUSE OF THIS, A BETTER SPEND OF MONEY IS GOING TO BE INTO THESE DRUG TESTING FACILITIES.



ISLE OF WIGHT FESTIVAL PROVED ITSELF AGAIN AS BEING BY FAR THE BEST FOR SAFETY ATMOSPHERE

FESTIVAL ORGANISERS CANNOT GOVERN THE WEATHER BUT SAFER WALKWAYS AND BAD WEATHER COVER AREA FACILITY IN DOWNPOURS WOULD INCREASE SAFETY AND ENJOYMENT

"I ATTENDED A FESTIVAL FOR THE DAY THIS YEAR. I WAS ABSOLUTELY DISGUSTED AT THE LACK OF SECURITY AND OF THE HEALTH AND SAFETY ISSUES I SAW. WHO DEEMS IT SAFE TO HAVE FIRES IN THE CAMP SITES? I WITNESSED MORE THAN ONE TENT IN FLAMES."



HOW DOES THIS CONCERN COMPARE TO PREVIOUS YEARS?

I FELT SAFER THIS YEAR THAN IN THE PAST - 17%



I FELT LESS SAFE THIS YEAR THAN IN THE PAST - 12%



IT HASN'T REALLY CHANGED - 65%



I HAVEN'T BEEN TO FESTIVALS IN THE PAST - 6%



43%

THOUGHT FESTIVALS SHOULD MAKE THESE SORTS OF PREMIUM FACILITIES MORE READILY AVAILABLE

PEOPLE STAYED IN...



A TENT - 56%



A CAMPER VAN - 10%



AN OFFSITE HOTEL - 18%



PREMIUM ACCOMMODATION/ VIP CAMPSITE - 6%

TOP FIVE MOST IMPORTANT ASPECTS OF STAGE PRESENTATION



1. SOUND



2. STAGE
LAYOUT



3. LIGHTING
QUALITY

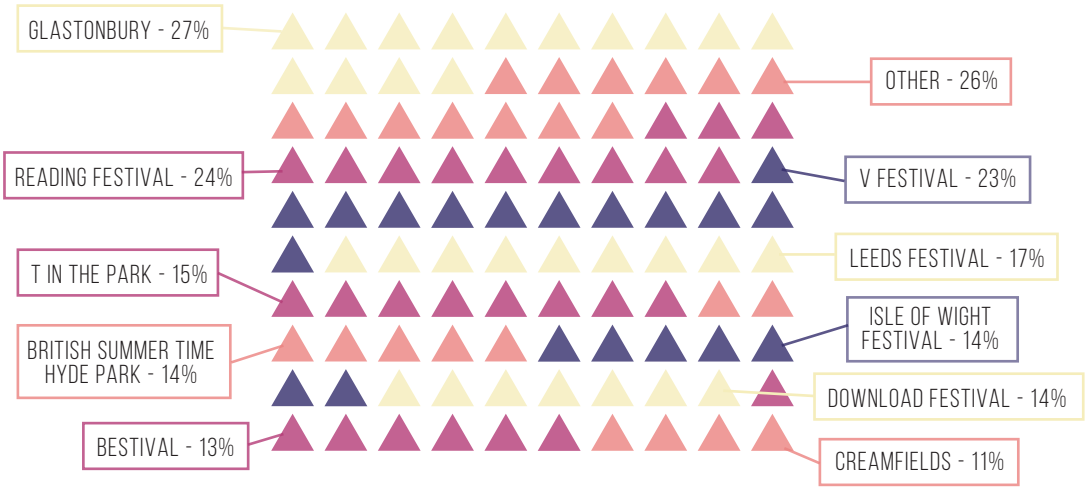


4. HIGH QUALITY,
VISIBLE SCREENS

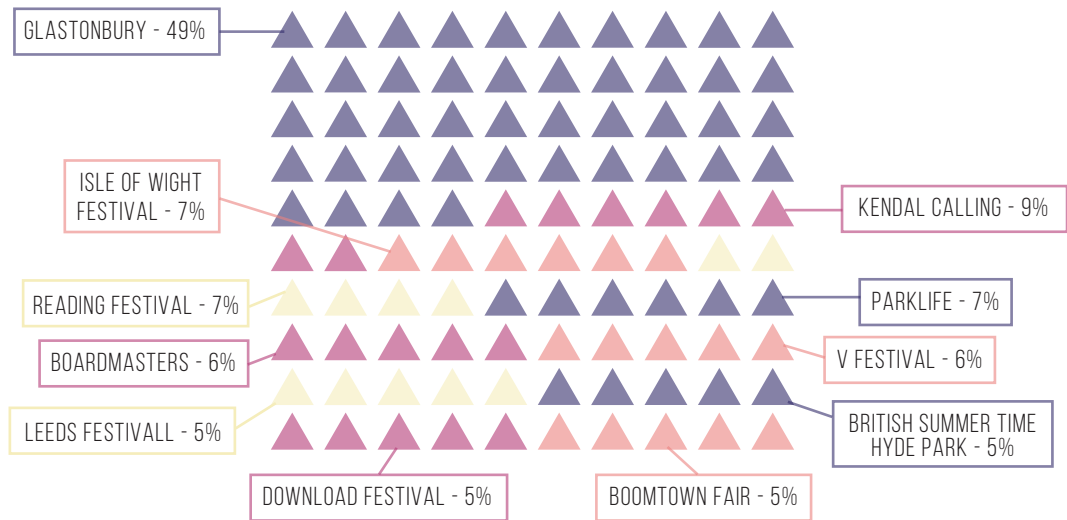


5. ONSTAGE
SPECIAL EFFECTS

WHICH FESTIVALS HAVE THEY VISITED **BEFORE**?



... AND WHICH FESTIVALS HAVE THEY VISITED **THIS YEAR**?



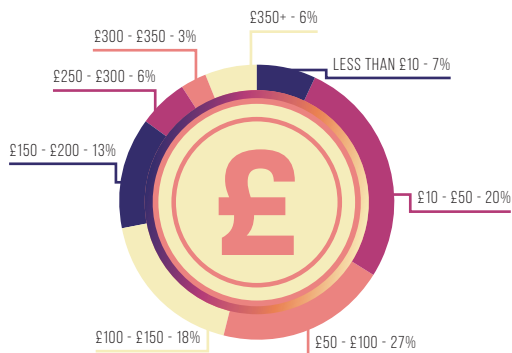


ROCKETING FOOD AND DRINK PRICES HAVE BEEN A TURN-OFF

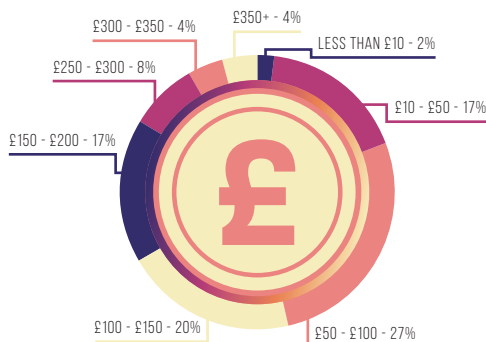
"WE WENT TO A FESTIVAL WHICH WAS GOOD BUT THE FOOD AND DRINK WAS EXTORTIONATE REALLY PUT A DAMPENER ON THINGS"

"TICKET PRICES ALONG WITH FOOD & DRINK PRICES ARE BECOMING RIDICULOUS. IT IS BECOMING A CHOICE BETWEEN A HOLIDAY OR A FESTIVAL."

HOW MUCH DID YOU SPEND **BEFORE** THE FESTIVAL, EXCLUDING TICKET?

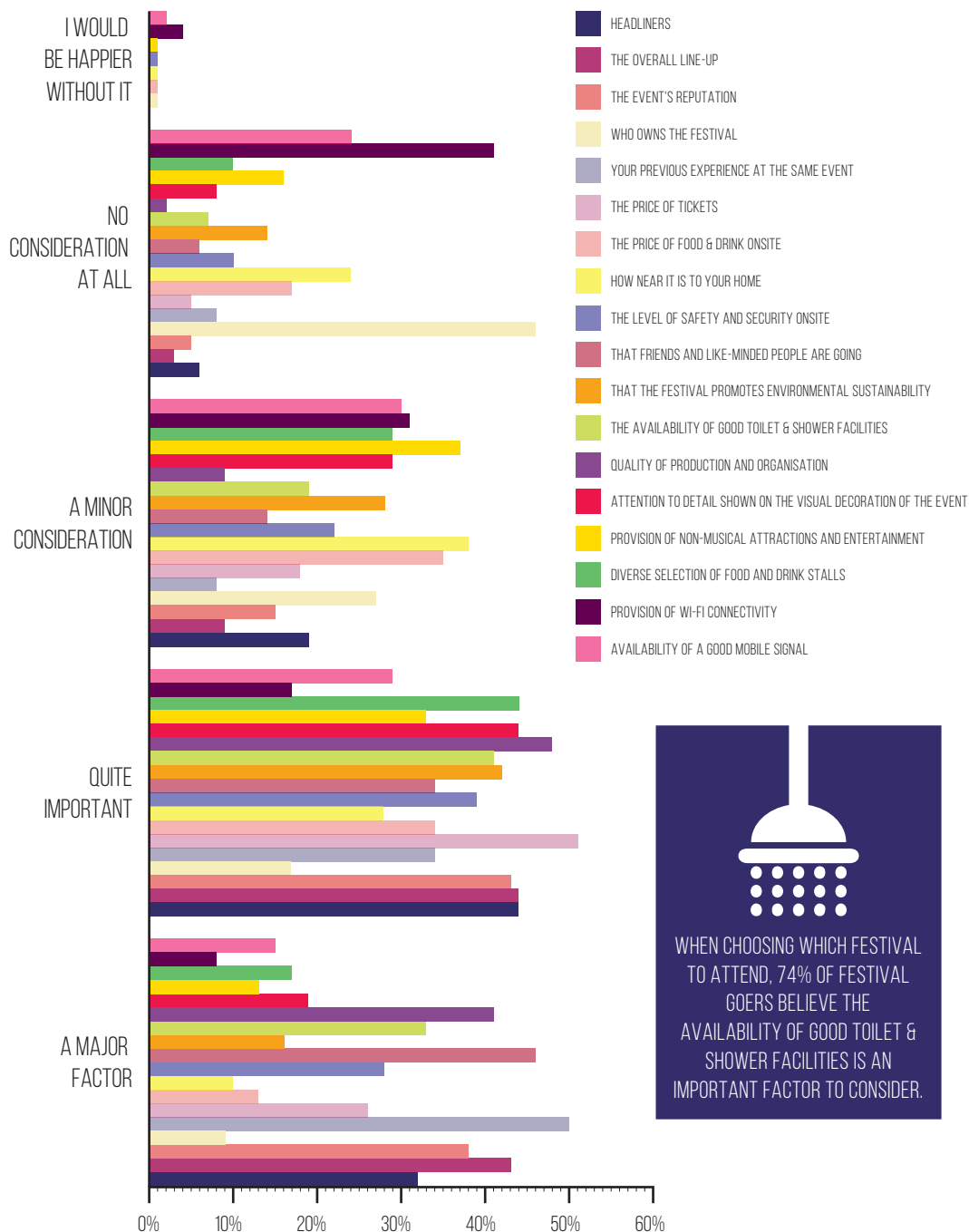


HOW MUCH DID YOU SPEND **AT** THE FESTIVAL, EXCLUDING TICKET?



WHAT MAKES OR BREAKS A FESTIVAL?

WHAT WAS REALLY IMPORTANT TO THE FESTIVAL-GOERS?

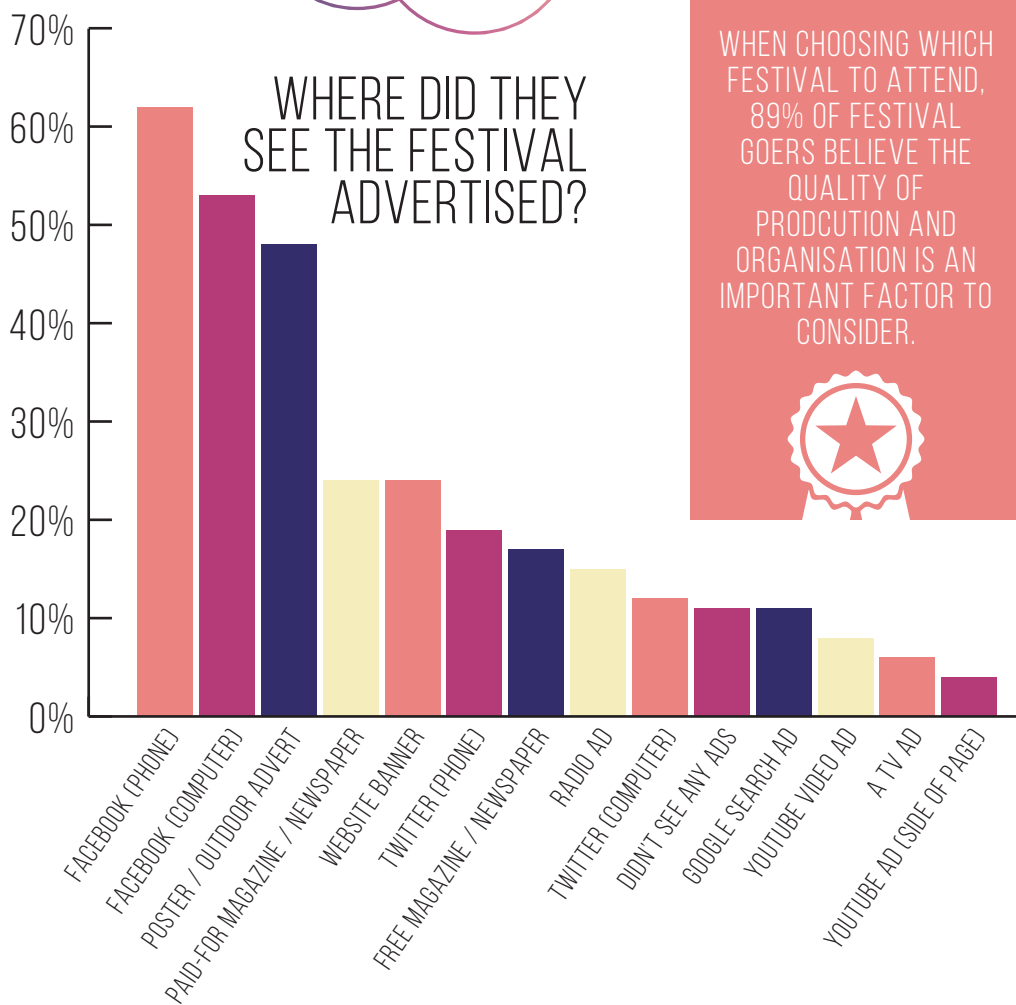


WHEN CHOOSING WHICH FESTIVAL TO ATTEND, 74% OF FESTIVAL GOERS BELIEVE THE AVAILABILITY OF GOOD TOILET & SHOWER FACILITIES IS AN IMPORTANT FACTOR TO CONSIDER.

FESTIVALS SHOULD BE MUCH MORE OPEN TO SUSTAINABILITY SUCH AS USING DIFFERENT TYPES OF RENEWABLE ENERGY TO POWER THEIR INFRASTRUCTURE.

FESTIVALS SHOULD DO MORE TO DISCOURAGE THE NEGATIVE IMPACT ON THEIR ENVIRONMENT, WITH MORE SUSTAINABLE FOOD / DRINK OPTIONS AND BETTER EDUCATION ABOUT THE IMPACT OF RUBBISH LEFT BEHIND.

58% OF FESTIVAL GOERS BELIEVED SUSTAINABILITY AN IMPORTANT FACTOR WHEN CHOOSING WHICH FESTIVAL TO ATTEND,



WHEN CHOOSING WHICH FESTIVAL TO ATTEND, 89% OF FESTIVAL GOERS BELIEVE THE QUALITY OF PRODCUTION AND ORGANISATION IS AN IMPORTANT FACTOR TO CONSIDER.



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