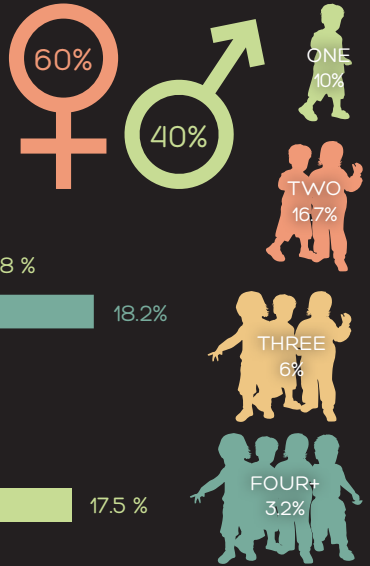
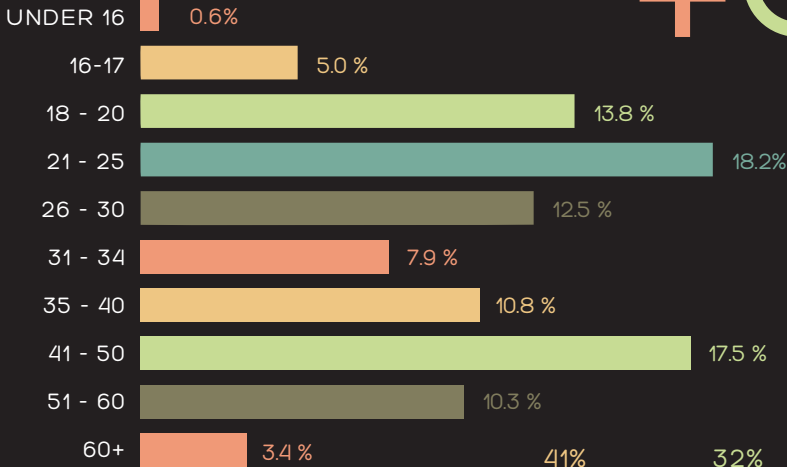


MARKET REPORT 2017



MEET THE FESTIVAL-GOERS...

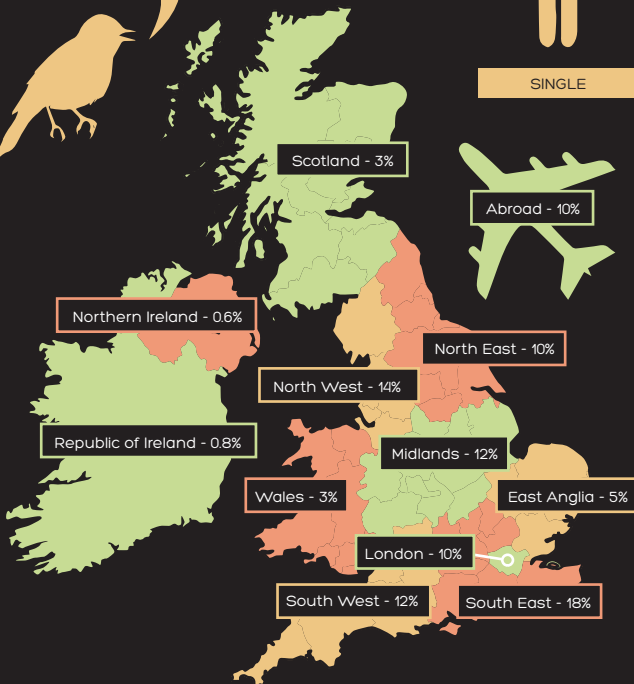
AGE



FESTIVAL-GOERS WITH CHILDREN

50%

Took advantage of an early bird ticket offer



SINGLE



IN A RELATIONSHIP



MARRIED

41%

32%

27%

THEY BOUGHT THEIR FESTIVAL TICKETS...



23%

At the first opportunity



16%

When friends bought theirs



19%

After the headliners had been announced



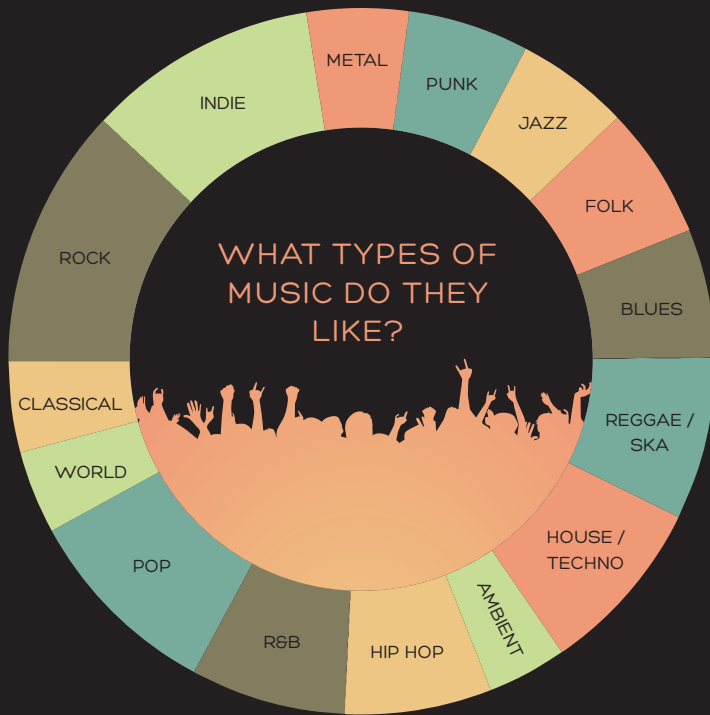
12%

When they saw the event advertised



10%

When there was an early-bird offer



WHERE DO THEY BUY MUSIC?



20% Buy physical formats on the high street



29% Buy physical formats online



44% Use a streaming service

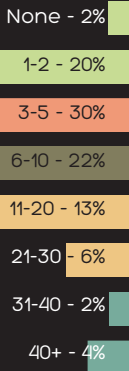


3% Don't own any music

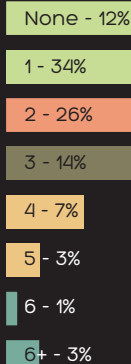


4% Torrent

HOW MANY GIGS DO THEY ATTEND PER YEAR?



HOW MANY FESTIVALS DID THEY ATTEND THIS YEAR?



9.5%

Earn £40,000+

23%

Earn less than £10,000

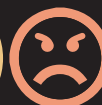
FESTIVAL TICKET PRICES...



Good value for money
19%

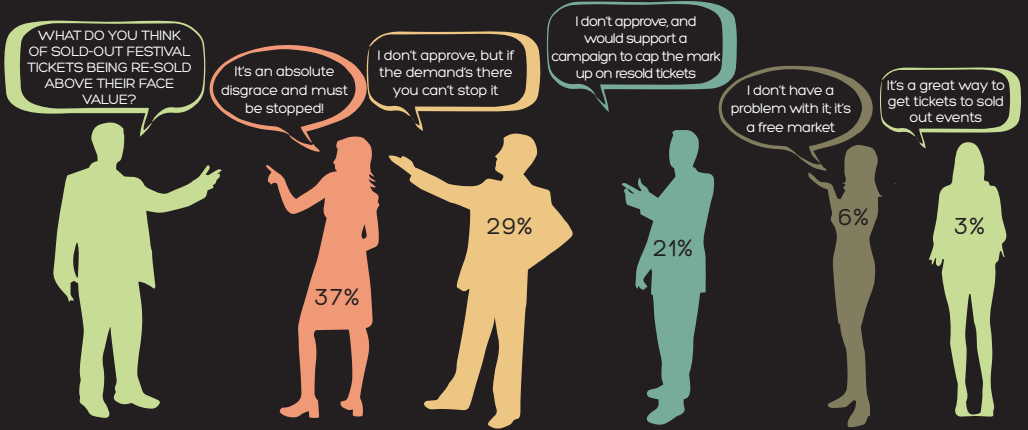
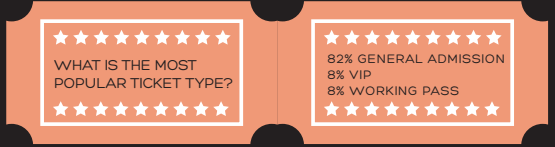
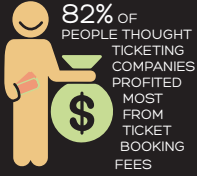
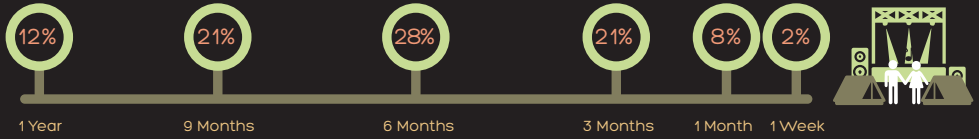


They're about right
60%



Overpriced for what they deliver
21%

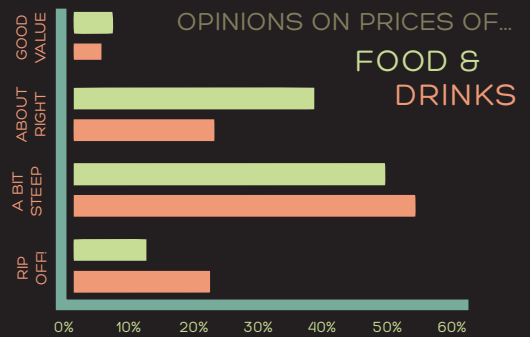
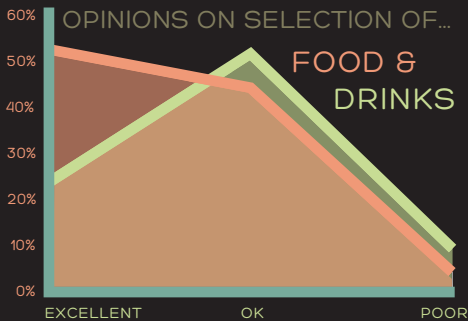
HOW FAR IN ADVANCE DID THEY BUY TICKETS?



WHAT'S THEIR FAVOURITE TIPPLE?



WHAT'S THEIR FAVOURITE FOOD?



BAR OPERATORS TAKE NOTE!



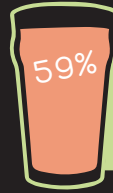
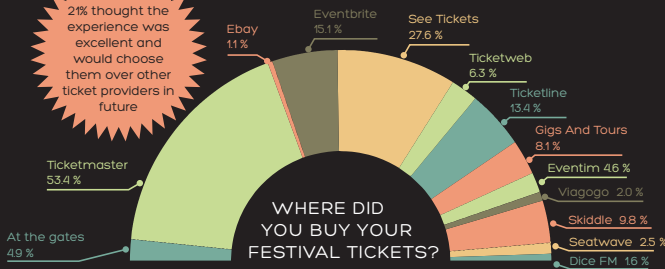
THE TOP 8 IMPROVEMENTS ATTENDEES WOULD LIKE TO SEE ON OFFER:

1. FREE PUBLIC WI-FI IN THE VICINITY OF THE BAR
2. DISCOUNTS ON GROUP ORDERS (SIX OR MORE DRINKS)
3. THE ABILITY TO PAY WITH YOUR DEBIT / CREDIT CARD
4. PHONE CHARGING FACILITIES
5. THE ABILITY TO PAY WITH FUNDS LOADED ONTO A WRISTBAND
6. A WIDER SELECTION OF BEERS
7. A WIDER SELECTION OF COCKTAILS
8. A WIDER SELECTION OF WINES

FAVOURITE WAYS TO PAY FOR A DRINK AT A FESTIVAL, BY THOSE WHO USED THEM:

- | | |
|----|--|
| 01 | CASH |
| 02 | CASHLESS PAYMENT SYSTEM |
| 03 | DEBIT OR CREDIT CARD |
| 04 | TOKEN SYSTEM (BOUGHT WITH CASH / CARD) |

2% thought the experience was excellent and would choose them over other ticket providers in future



59%

Of festival-goers thought £4 was a fair price for a pint

THE OVERALL LINE-UP

was most when festival

CONSIDERED IMPORTANT Choosing



THE element WHICH ATTEND

PREVIOUS EXPERIENCE AT THE SAME EVENT

FRIENDS AND LIKE-MINDED PEOPLE ARE GOING



QUALITY OF PRODUCTION AND ORGANISATION

THEIR IDEAL SIZE OF FESTIVAL

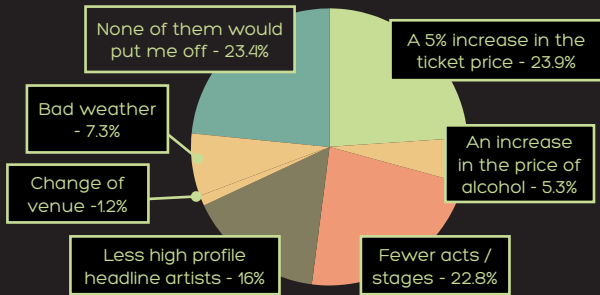


67% TRAVELLED BY CAR



20% TRAVELLED BY TRAIN OR COACH

WHAT WOULD STOP THEM COMING BACK NEXT YEAR?



THIS IS WHAT FESTIVAL-GOERS ENJOY THE MOST WHEN ATTENDING FESTIVALS:



The music 64.2%

Hanging out with friends 19.4%

Getting back to basics 7.3%

Meeting new people 6.8%

Getting smashed 2.4%

Limited choice of food or drink 1.9%

Unfriendly security 1.8%

Inability to pay by card / lack of cashpoints 2.1%

Bad organisation 2.4%

Poor sound 2.7%

Restrictions on what you could bring 5.4%

The price of tickets 5.4%

Having to walk long distances 5.8%

No showers / clean toilets 7.3%

The price of food & drink onsite 8.5%

Queues and overcrowding 8.8%

Wet and muddy conditions 12.4%

Favourite bands clashing on the running order 43%

THE HOME COMFORTS THEY MISS THE MOST



CLEAN, FLUSHABLE TOILET 22.3%



BED 18.2%



SHOWER 8.9%



PHONE CHARGER 4.3%



DECENT MOBILE RECEPTION 5.3%



INTERNET 3.2%



KITCHEN 1.3%



TV 0.2%



36.2% DID NOT MISS ANYTHING!

HOW MANY OTHER PEOPLE WENT WITH THEM IN THEIR GROUP?



None

One

Two

Three



Four

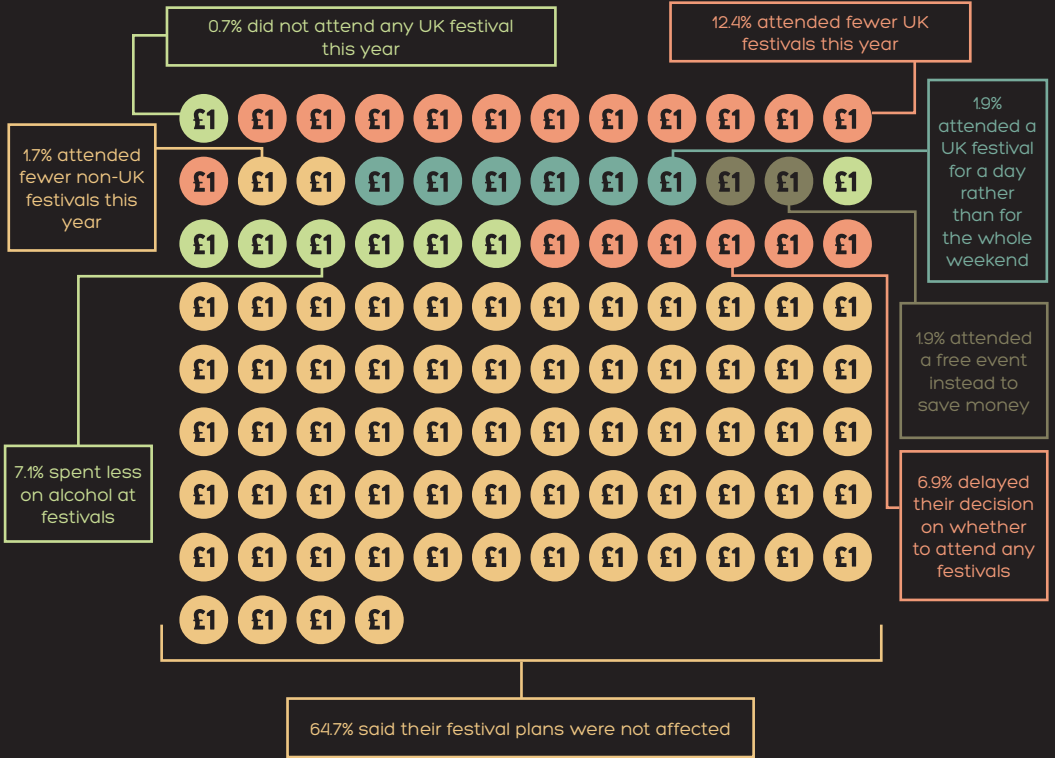
Five

Six or more

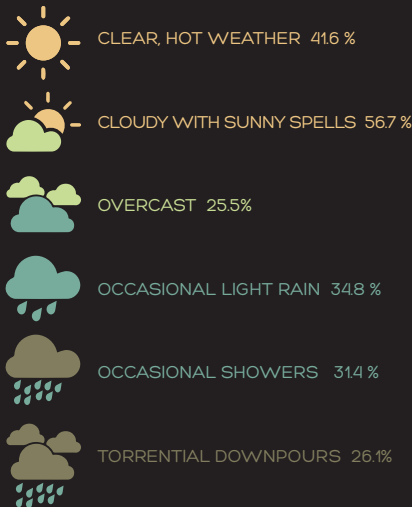
AND THEIR BIGGEST UK FESTIVAL GRIPES:



HOW DID THE ECONOMIC CLIMATE IMPACT THEIR FESTIVAL PLANS?



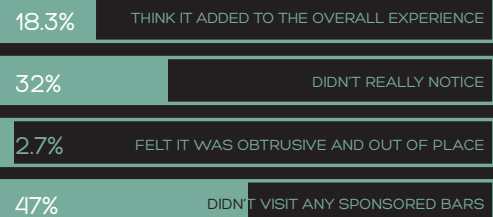
HOW WAS THE WEATHER?



85.7% TOOK THEIR TENTS HOME FROM THE FESTIVAL



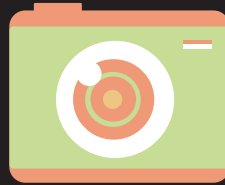
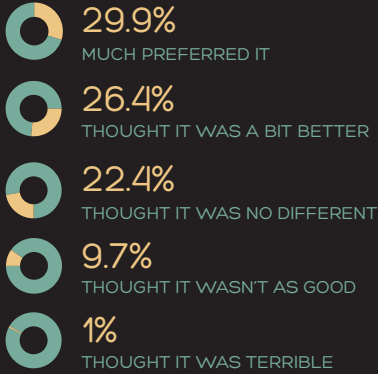
IMPRESSION OF THE SPONSORED BAR AREAS...



12.8% HAVE GONE TO FESTIVALS OUTSIDE OF THE UK THIS YEAR



OF THOSE WHO WENT TO A FESTIVAL ABROAD...



86.2%

HAVE NEVER REGRETTED A FESTIVAL PICTURE THEY POSTED ON SOCIAL MEDIA



20.9% ADMITTED TO TAKING ILLICIT DRUGS AT A FESTIVAL



13% TOOK LEGAL HIGHS

37.2% OF FESTIVAL-GOERS SMOKE



WHAT THEY LIKED ABOUT FESTIVALS ABROAD...



Better atmosphere



Better organisation



Cheaper food & drink



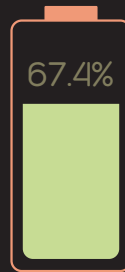
Better line-up



Cheaper tickets



Better weather

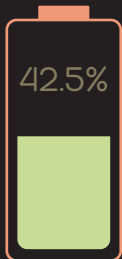


RECHARGED THEIR PHONE AT A FESTIVAL

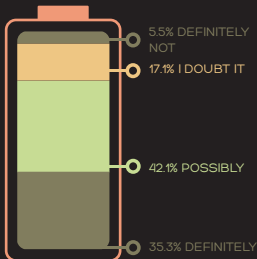


HOW THEY CHARGED THEIR PHONES

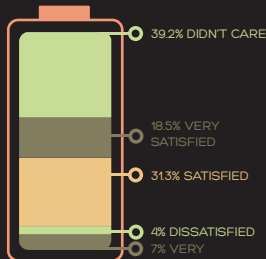
- 12.7% OTHER
- 47% PAID TO RENT A PORTABLE BATTERY
- 57.4% USED THEIR OWN PORTABLE CHARGER
- 6.9% PAID TO LEAVE THEIR PHONE AT A FIXED CHARGING STALL
- 12.7% BROUGHT THEIR OWN SPARE BATTERY



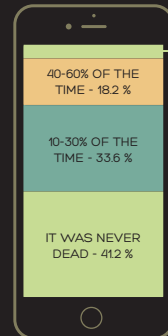
THOUGHT MORE FESTIVALS SHOULD MAKE A CHARGING SERVICE AVAILABLE



WOULD RECOMMEND THE CHARGING SERVICE TO A FRIEND

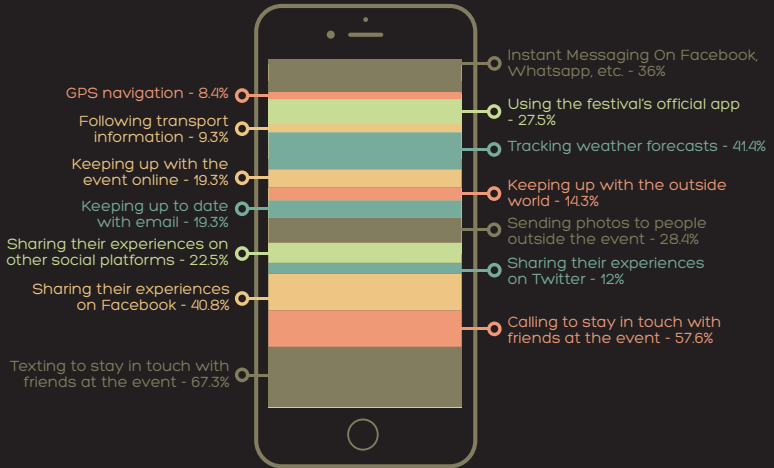
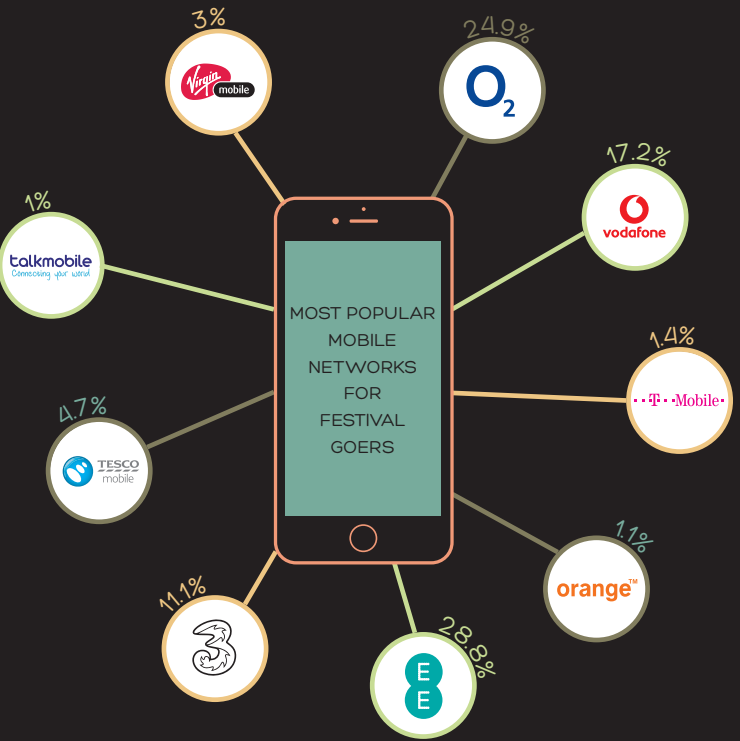
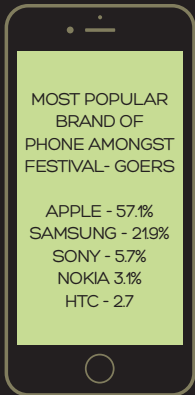
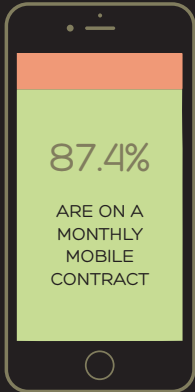


SATISFACTION WITH CHARGING SERVICE



PERCENTAGE OF TIME THEIR MOBILE PHONE BATTERY WAS DEAD AT THE FESTIVAL

70-100% OF THE TIME - 5.3%



WHAT THEY USED THEIR MOBILES FOR AT FESTIVALS



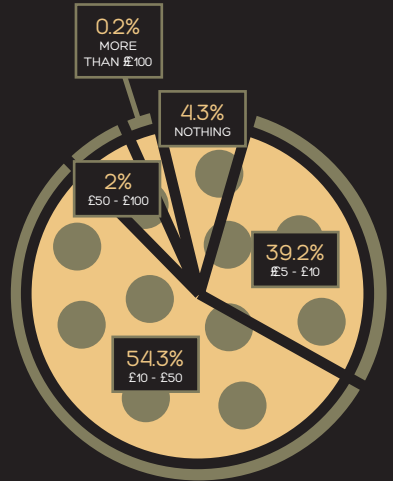
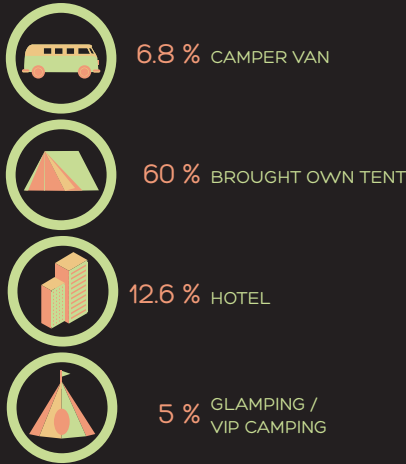
AMOUNT SPENT ON ALCOHOL DAILY



BUDGETING APPROACH TO FESTIVALS

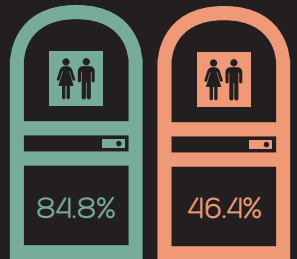
16% Someone else was responsible
 23.8% Set budget and withdrew money when needed
 36.2% Set budget and stuck to it
 39.2% Didn't set an initial budget

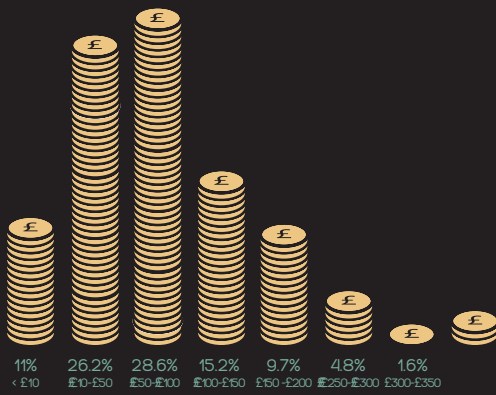
FESTIVAL ACCOMMODATION CHOICES



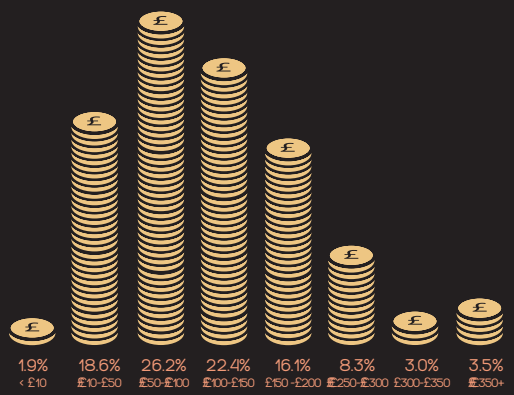
AMOUNT EACH FESTIVAL-GOER SPENT ON FOOD DAILY

HOW LIKELY THEY WOULD BE TO NOTICE AN ADVERT FOR A FESTIVAL ON THE FOLLOWING PLATFORMS...

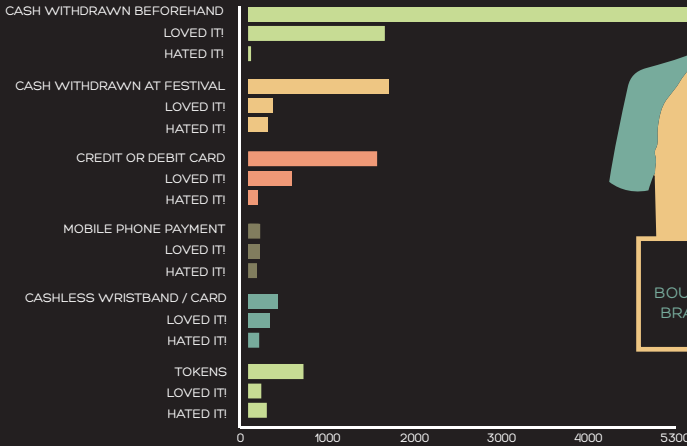




AMOUNT SPENT BEFORE EACH FESTIVAL (EXCLUDING TICKET)



AMOUNT SPENT DURING EACH FESTIVAL



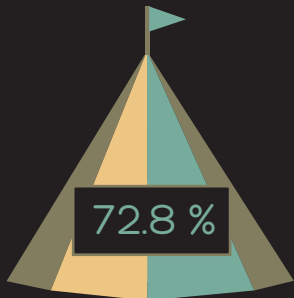
METHODS OF PAYMENT USED Vs THE USER EXPERIENCE



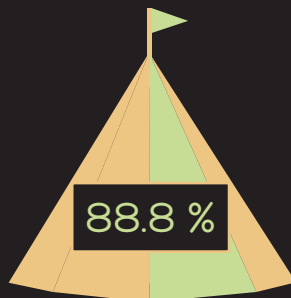
22.7%
BOUGHT AN ARTIST
BRANDED T-SHIRT
THIS YEAR



34%
BOUGHT A FESTIVAL
BRANDED T-SHIRT
THIS YEAR



FELT THAT PREMIUM ACCOMMODATION WAS GOOD VALUE FOR MONEY



WOULD CONSIDER PAYING FOR VIP ACCOMMODATION AGAIN IN THE FUTURE

47.7%
accept that festivals need brand sponsorship, but doesn't improve their enjoyment

44.2%
remember sponsors from the festivals they attended



/ CONTACT

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