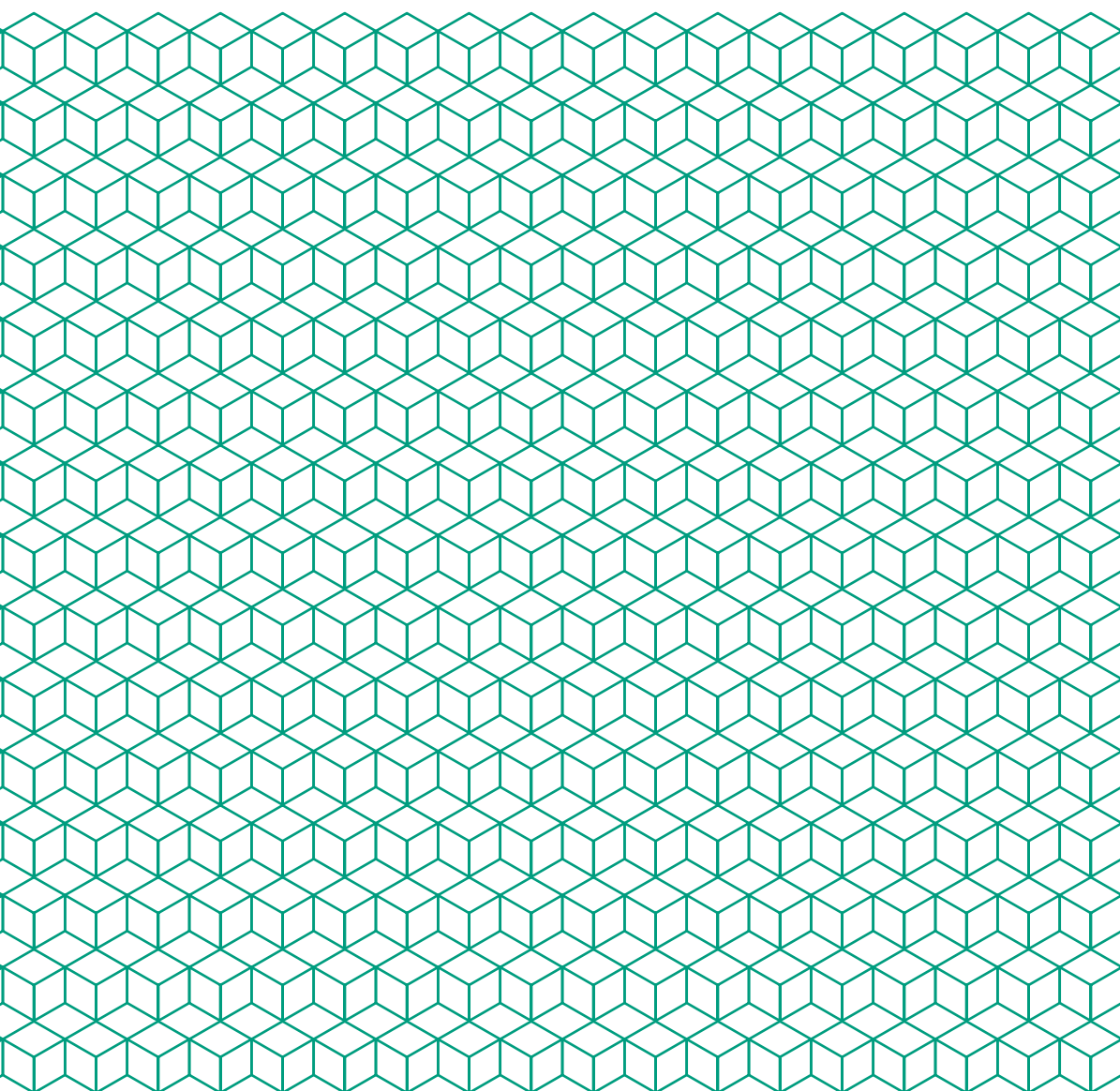




ASSOCIATION OF INDEPENDENT FESTIVALS

TEN YEAR REPORT

2008 - 2018





Photograph: The Beat Herder



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Uniting and Empowering Independent Festivals

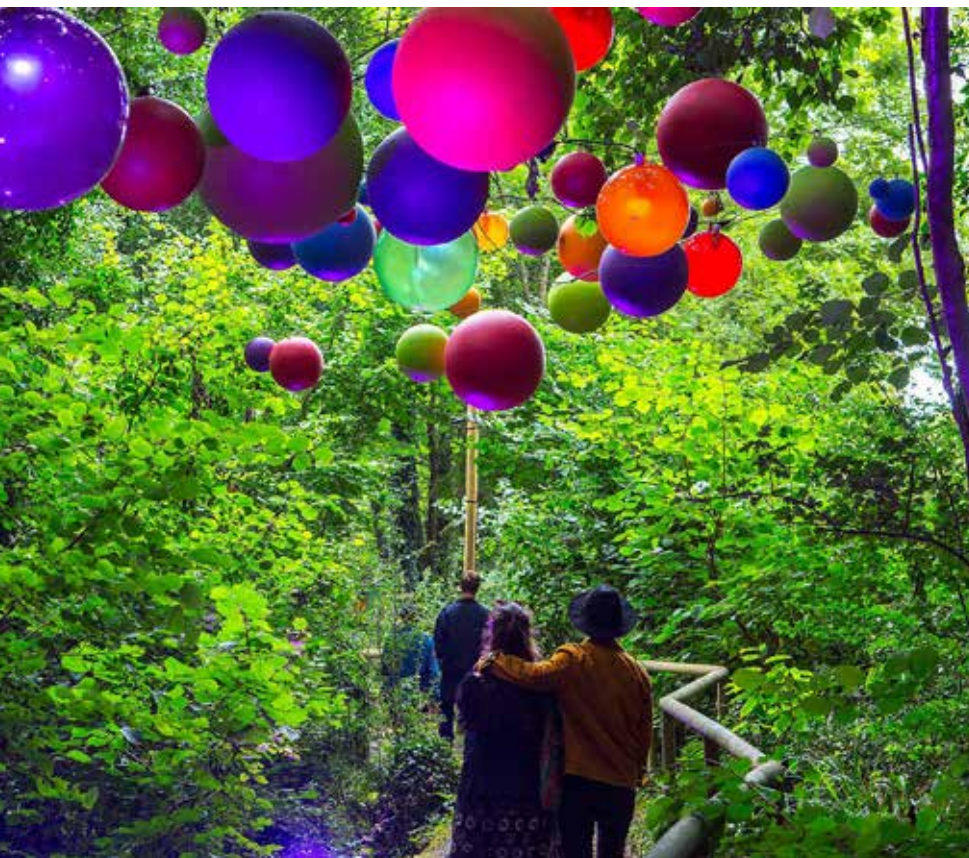
This report is a summary of ten years of work undertaken by the Association of Independent Festivals. We hope that this gives a broad view of the work we are doing, and a look towards where the organisation is going.

Our core mission is to provide a vital support network for our members - and to act as a collective voice on issues affecting their

businesses and the overall sector. Whether that's a separate PRS tariff for festivals, lobbying against business rates, or producing hugely impactful public campaigns on issues ranging from the dangers of using legal highs, the economic impact of independent festivals, and more recently, sexual violence and harassment at festivals, and single use plastics. Independent festivals are at the forefront of the industry, leading on these important audience facing issues.

In recent years AIF has become more authoritative, and a little more combative - with sharper teeth where needed. Our reputation is strong through the festival and events industry, not only as an invaluable forum for promoters, but as an effective and pro-active national trade association. We've also changed our image significantly, and our flagship Festival Congress and Independent Festival Awards have become an annual fixture and true celebration that reflects the creativity and innovative approaches of our membership.

Ten years is a long time in any industry, and more than ever independent festivals need to stay on top of changing market forces, legislation, and innovations that impact the industry. We see AIF as a key way for our members to do this, and look forward to working for the next ten years, and beyond.



Bestival - Photographer: Victor Frankowski



Paul Reed, CEO of
Association of Independent
Festivals at Festival
Congress 2017

Photographer: Gareth Bull

Ten Years of AIF: CEO's Introduction

This report marks the tenth year of the Association of Independent Festivals. Formed in 2008, AIF exists to provide a collective voice and vital support network for our members, and to represent the voice of the independent festival community on collective issues. We now have 65 festival members and as many affiliate members on our Friends scheme - companies who understand and support the value of the independent festival community. When AIF was brought into existence by a handful of festival promoters, the organisation was as much a talking shop as anything else, to discuss shared approaches and exchange anecdotal and useful information.

It still serves this fundamental purpose but as we move into our second decade as an organisation, many of those founders have moved on and much has changed, both in the festival market, and in wider society. Over the last ten years we have seen increased market consolidation and increased competition in the festival business, alongside rising infrastructure costs and higher fees for artists.

We've also seen the decline of some major traditional "headliner driven" festivals, reflecting a change in consumer expectations of what people understand festivals to be. Our members have driven this sea change, delivering exciting and innovative new formats each year.

As consumer expectations have shifted, the capacity for customers to document issues immediately on social media has also grown. It might seem astonishing that in 2008 Facebook was in its infancy, Twitter was just two years old, and the iPhone had only been around for a year. Wider access to technology - and in particular mobile technology and social media - has changed the way festival goers interact with festivals. Consumers now have the capacity to document issues immediately on social media, and for many, social media is the primary driver of awareness for festivals.

There is also heightened awareness around welfare issues, such as drug use and sexual safety, and increasing interest in issues around sustainability, such as single-use plastics. Independent festivals are leading the way on many of these important audience-facing issues, and our continual dialogue with members enables us to take the temperature of the industry. The support of members adds great weight and scope to our campaigns, giving us huge direct reach to audiences and the ability to be a collective voice for the sector.

As CEO of AIF, and General Manager since 2013, I'm proud of changes that we have helped achieve. We have lobbied for and achieved a reduction in the PRS tariff for festivals, a three-year process that was worth the time, cost and energy that went into it.

We were instrumental in an industry-wide effort to stop a Home Office consultation on Special Police Services. We lobbied government on maintaining an agricultural exemption for business rates on festival and events sites, triggering multiple Parliamentary debates. In addition, we worked closely with experts on individual cases, dramatically reducing costs for many affected members. We were also one of the first out of the gates to tackle the problem of secondary ticketing, setting up the Fair Ticketing Charter and Ticket Trust, giving evidence directly to parliament on ticketing abuse and actively supporting the creation of the FanFair Alliance campaign. This activity has tangible impact on member's businesses.

As we look ahead to 2019's festival season and beyond, there is a real opportunity for independent festivals to emphasise the value and meaning of independence and educate the customer

as to where their money is ending up. Is buying a ticket to a festival enabling a small local team to continue promoting a "labour of love" festival, or is it going into the pockets of a transnational corporation? It is important for us to consider the meaning of 'independence' in a rapidly changing festival market and how this is reflected in AIF's core values. This is part of an ongoing dialogue with members.

This year, we published a festival ownership map, and launched our stamp of independence for truly independent festivals. This is important because we the independent festivals community are facing an existential threat, as the power of huge multinational vertically-integrated music conglomerates grows, making it increasingly difficult to book and promote independent festivals.

This is happening on a global scale, affecting promoters and artists, and ultimately impacting on the customer experience. AIF has called for a competition investigation to examine these issues, and we will continue to loudly sound the alarm.

It is easy to forget that the festival industry is still relatively young, and there are many stones left unturned. Provided promoters have strong ideas, unique concepts and sites and the ability and expertise to deliver those ideas effectively, we will continue to see growth in the independent sector.

I feel that the continuing emphasis on experience is a significant positive trend and huge opportunity for AIF members. Our research shows that across ten years of surveys, an average of 53% of people who buy a ticket for an independent festival do so for the overall atmosphere, experience and quality of the event, with only 8% buying for headliners. Independent festivals place the audience at the heart of the experience.

The unique vision driving many independent festival promoters means that our members are better placed than ever to deliver extraordinary experiences in extraordinary settings, allowing people to take a magical step out of time. However, the purpose of festivals goes far beyond escapism and entertainment- they are a platform for influencing audience behaviour, provoking thought and debate and effecting positive change in wider society. Our campaigns and work demonstrate the power of communities and collective action.

As AIF we will continue to support, champion and fight for change to support that vision, as we look to 2019 and beyond. Welcome to the AIF Ten Year Report.

Our Current Campaigns

1

Drastic On Plastic

Reducing our reliance on plastic is one of the big challenges of our age. AIF member festivals are leading the charge by agreeing to stamp out single-use plastics by 2021.

2

Safer Spaces

Sexual violence and harassment should never be tolerated. Our Safer Spaces campaign aims to help festivals communicate zero-tolerance for sexual violence and harassment at their events.

3

Support for Multi-Agency Safety Testing

Drug use is an ongoing issue at festivals of all sizes. Ensuring safety and reducing harm from drugs is key, and MAST drug testing is helping achieve this.



Boomtown - Photographer: Charlie Raven

// AIF ACHIEVEMENTS //

Special Police Service (SPS) Costs

All festivals require security and policing - and these costs can make up a substantial part of a festival's budget. AIF research shows that a majority of festival goers welcome police presence on festival sites - in 2017 63.8% of respondents said that they thought police should be present, and a significant proportion - 40% - of those who said yes said that they considered policing at festivals to be part of the police force's duty to the community.

In 2014 we were successful in influencing the Home Office's decision not to proceed with an all out review of the system of charging events organisers for Special Police Services.

Special Police Services are any police services above and beyond "core" police duties, and are part of a competitive market for security services. One of the key differentiators here is that "core" policing takes place on public land - so includes police duties related to safety of people travelling to festivals, while SPS are those duties specifically requested by an event organiser.

Event organisers that request SPS are required to pay for those police service that relate to their event - but, critically, do not pay for core policing duties.

At the heart of the proposed change was the idea that the police might be empowered to impose and charge for whatever level of SPS that they saw fit - with those charges potentially being applied to core policing

duties on public land, as well as service requested for policing on private land.

AIF coordinated a cross-industry coalition of more than 689 festival organisers, venue owners and event promoters, to write directly to then Minister of State for Policing Damian Green MP.

We argued that giving the police free reign to impose charges on events would have damaged the competitiveness of our members' events, and would inhibit new festivals and events from entering the market, as well as potentially forcing existing festivals and events to cease operations, due to prohibitive costs.

As a direct result of our intervention, the Home Office scrapped the proposed review and the present system was maintained.

This was a significant victory not only for AIF members, but the events industry at large, safe-guarding jobs and helping remove uncertainty around policing costs.





// AIF ACHIEVEMENTS //

PRS Tariff Reduction For Festivals

When PRS for Music launched a review of its Popular Music Concerts Tariff (also known as Tariff LP) in April 2015, AIF made the argument at an early stage for festivals to be treated differently to concerts, and made it clear that any price hike from the existing rate of 3% would have a catastrophic effect on the independent and grassroots festivals community.

We provided a detailed response to the PRS consultation, and made key contributions to numerous meetings with the other live industry parties involved, and the PRS.

Using annual audience research data we were able to successfully argue that the nature of festivals has shifted - music is no longer the sole driver for audiences attending festivals,

with most consumers attending for the overall experience.

We argued that festivals have unique infrastructure costs and that there is a complexity to delivering multi-arts content that differs to regular concerts.

By actively engaging in the consultation and campaigning publicly around the issue we were able to make an effective case for a separate tariff for festivals. PRS acknowledged this in a new tariff announced this year with a reduced rate for qualifying festivals of 2.5% while the royalty rate for concerts rose from 3% to 4%. For many of our members this saving unlocks money to allow continued investment in delivering exceptional independent events.

// HIGHLIGHT //

AIF CHAIR: Jim Mawdsley

My history with the AIF goes back a long time - aside from my four years as chair, I've been involved pretty much from the start. I went along to one of the very first meetings. There were ten or twelve of us back then, I was running a festival up in Newcastle and had come very much from a live music promoting background - gigs, club nights. I would speak to other promoters, and there

was a commonality, you'd share information on things, even share DJs, so when AIF came about I really understood what Robby (Rob da Bank) was trying to achieve. If you're the founder of a business, or leading a business, especially one that's growing, it can be a lonely place. It's sometimes difficult to find like minded people you can share things with, people to have a peer-to-peer chat, to ask questions and say "How would you deal with this?"

When you're running a festival you're essentially setting up anything from a small village to a very large town for a weekend. You've got to build everything from scratch. Everything, from how many toilets you need, to the actual licence itself, how much space you need, understanding what security you need, what welfare services. If you're trying to do that on the basis of just growing with your own experience, that can be challenging. So from the beginning the AIF was something that I saw as a really good place for people to share their experiences and talk to each other. But I also thought early on that it was a great opportunity that if there were central issues that members needed campaigning on, there was a central body there, an organisation. I'd seen how effective AIM, the BPI and the MMF were being, so I understood that if we got it right the effectiveness of something like AIF wouldn't be insignificant.



*Jim Mawdsley, AIF Chair at Festival Congress
2017. Photos by Gareth Bull*

Without a shadow of a doubt customer experience at festivals is paramount. People want to be immersed when they go to festivals - be immersed and be entertained. There are festivals where you can turn up and buy a beer and watch a few bands and that's great if that's what you want to do. But I think the festivals that have done really well and been significant in the last few years are the ones that have truly immersive experiences. You want a festival to be an area of discovery, to be a multiple cultural offering. You want to be able to go there and experience new things, almost to step out of reality - to go with your family, or your friends, and get something so culturally different that you're not going to get it anywhere else.

Despite that, music is still an important part of this mix, and there are still a lot of independent festivals that still rely on making sure they've got a high level of ticket buyers, new and existing. There is a threat - it would seem that the bigger players are deliberately targeting smaller festivals as competitors. They want to make sure that they've got exclusivity on talent. Those bigger players can say "play our festivals and we'll promote you the rest of the year" or "if you're going to play our festivals we want your touring business as well". That seems to be a very recent tactic. But out of any threat there comes an opportunity and I think the opportunity is for independent festivals to be more creative about what they do, and to make sure the creative process is further up the bill. There are always going to be audiences who want to see big names on a festival bill, and if that's what they want there's plenty for them, but the opportunity is that we have to be more and more creative about what a festival offers, and how it's presented in terms of what's there on site. Jointly we need to keep pushing and

keep demonstrating the message of how creative our but the opportunity is that we have to be more and more creative about what a festival offers, and how it's presented in terms of what's there on site. Jointly we need to keep pushing and keep demonstrating the message of how creative our events are and how they are offering a better thought out alternative, that in terms of apart from the music you get more for your money.

There's a lot to be said for the fact that there are a lot of people out there producing creative and art related work that's done on a commercial basis. These are the things that make cities tick. Cities love to boast about their local festivals - it's part of their cultural offering, but often very commercial. It's not subsidised, it's done by promoters as a business. Festivals fit very firmly into this bracket.

I honestly believe that if people are coming forward with great creative ideas and a great drive to do it and they build festivals slowly and carefully there's still a market for new festivals. I don't think it's impossible to start a new festival - you've got to have your ideas right, you've got to have your marketing right, you've got to have your content right. It's that great thing - it's how you sell it to the public which will make them come, but it's what you give them while they are there that will make them come back. And yes, inevitably some festivals will fall by the wayside, but that's the economic inevitability of any business in any sector - new businesses starting and other businesses folding because they haven't had the traction, because they can't find the customers, or because the product isn't right.

Going forward I think that the more independent festival there are out there, the more important it is that those festivals become members of the AIF so that they can take part in the discussions and debates and decisions, and understand what is championed by the AIF on behalf of its members. The key achievement of the AIF is having the independent festival sector recognised as a sector that needs to be listened to and understood, and which has meaningful impact on the cultural aspect of the UK. We are a sector that is significant enough that our voice needs to be heard, and the AIF as a body representing that sector is one that needs to be spoken to. That's really important.



1

People Focused Festivals

More people than ever say "camping with friends" and "people attending" are among the things that they enjoy most at festivals, showing the importance festivals play in bringing people together.

2

Tickets Sell on Experience

When asked the single most important factor influencing ticket purchases a majority of people say "atmosphere, vibe, character and quality of event" is key. We explore this in detail on page 34.

3

Transport Trends

Unfortunately our reliance on cars just keeps on growing - more than 66% of people travel to their festival of choice by car, with more people than ever travelling in a car of two or fewer people.



Shambala - Photographer: Louise Roberts

RESEARCH OVERVIEW

Every year since the AIF was founded, we've coordinated audience surveys with the attendees of our member festivals. Over the course of a decade, we've tracked festival goers' attitudes to a range of things - and over time introduced new topics that we can track over coming years.

This is important work - it gives us significant primary data to use as evidence when we lobby on issues affecting the industry, and more broadly helps us - and our members - understand what makes independent festival audiences tick.

Since 2008 when the survey was first run (polling the opinions of audiences from the 2007 festival season) we've had responses from nearly 30,000 individuals, with peaks in some years of more than 4000 responses. Demographically speaking, responses tend to be weighted about 60/40 female to male, and relatively evenly split across age groups.

4

Social Media's Dominance

Social media has come to dominate audience communication over the past ten years - awareness via print publications and billboards has tumbled from 52% in 2010 to just 25% today

5

Campervan Renaissance

For those of us who enjoying home comforts more than roughing it in a field, campervans are a happy medium. Many festival goers agree, and campervans have doubled in popularity since 2010.

6

Crime & Police Presence

Police make people feel safer and most people welcome police on festival sites. Crime has dropped sharply over the last ten years, from 1 in 8 people experiencing crime in 2008 to just 1 in 50 today.

7

Tent Abandonment

Camping is an essential part of the festival experience for many people - but abandoned tents are a big problem. Thousands of kilos of waste are generated each year by festival goers leaving tents behind.



9.7%
of
TENTS
DITCHED EACH YEAR

// RESEARCH HEADLINES //

Tents & Waste

Discarded tents are a big problem at festivals - in fact, nearly 10% of people who responded to our survey have abandoned a tent at a festival. This can be for many reasons - the often mistaken belief that abandoned tents will be recycled for homeless people or refugees, but more often simply because "festival tents" sold by supermarkets and online retailers are so cheap that they are priced as disposable items.



TONNES
of wasted plastic
OVER A DECADE
which equals



875 Tonnes of Waste From Tents

From our data we know that roughly 78% of people attending our member festivals choose to camp. With roughly 600,000 people attending member festivals each year over the decade, and assuming that two people share a tent, this could represent as many as 22,700 abandoned tents each year.

By analysing best selling and most-wishlisted tents on Amazon.co.uk we can assume that the average tent weighs around 3.5kg - almost all of which is composed of plastics, including the flexible poles favoured by most tent manufacturers. Over the decade we have been asking this question, as many as 250,000 tents representing a staggering 875,000 kilograms of plastics may have been abandoned by festival goers - which is equivalent in weight to 8 blue whales or 70 Routemaster buses.



6

6

%

travel to festivals
by car

but
only

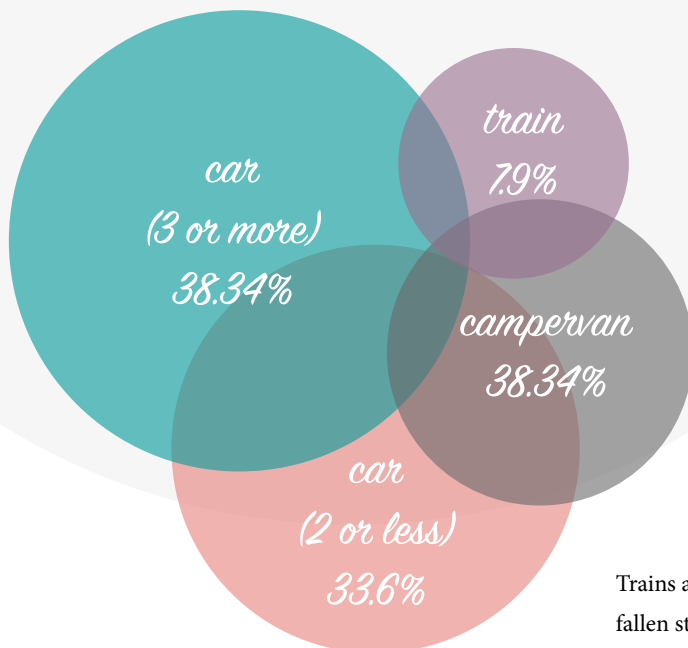
8

%

travel
by train



Travel in 2017



Travel & Transport

Despite many festivals trying to encourage more sustainable modes of transport, nearly two thirds of people make their way to festivals by car - 66.7% averaged over ten years. Over the decade festivalgoers reliance on cars has increased: in 2008 only 61.2% travelled by car, while 2017 saw 71.2% make their journey in a car. More worryingly, the number of people travelling in a car with 2 or fewer people has almost doubled over the decade. Where just 17% of people travelled in a car with 2 or fewer people, by 2017 this was 33.4%

Incentivising Public Transport

Trains are just not cutting it. The number of people using trains has fallen steeply over the years. In 2007 18.3% of respondents said they travelled to the festival they attended by train.

By 2017 this had fallen to just 7.9% meaning that for every person travelling by train another nine made their festival journey by car.

While the number of people using private transport to get to festivals remains high various incentives may help change behaviour. 30% of people said that they would use public transport to travel to festivals if it guaranteed fast-track entry, and 42.7% discounted public transport tickets would be an incentive.

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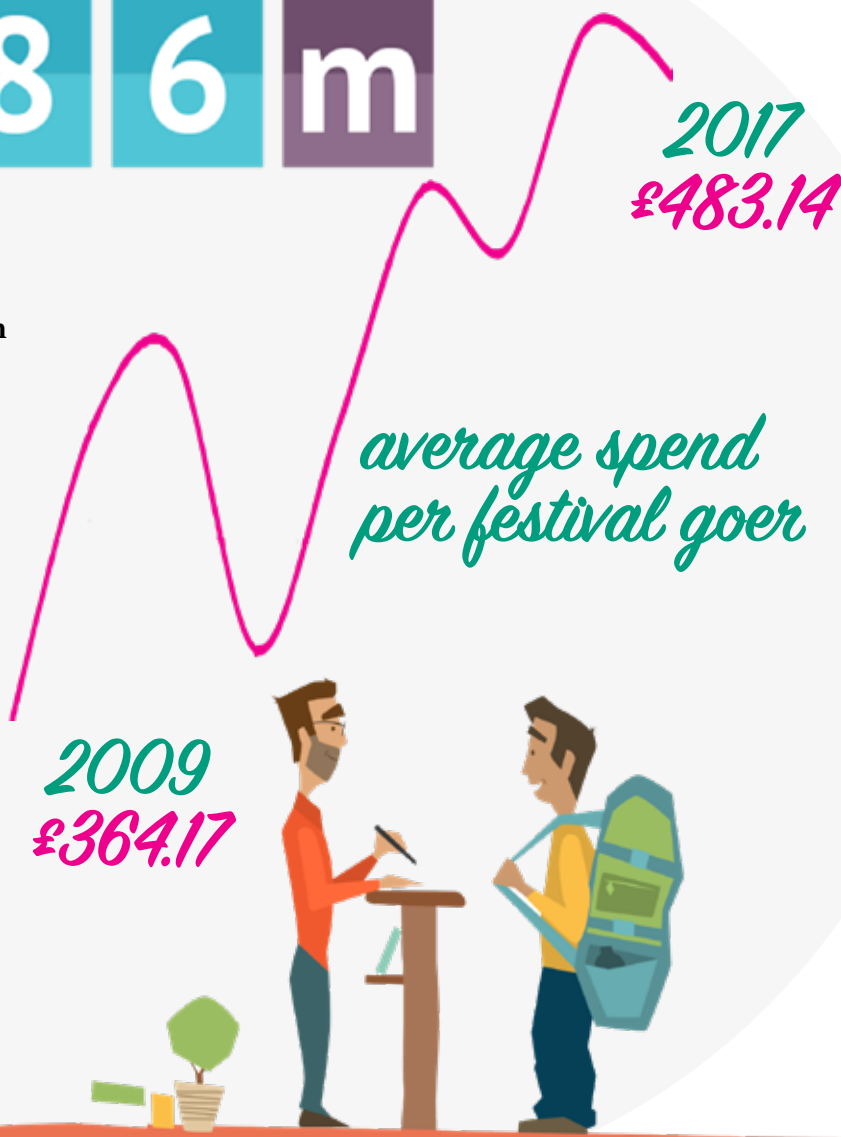
//FESTIVAL SPENDING //

AIF Festival Spending Worth an Estimated £386 Million to UK Economy in 2017

Audiences at AIF Member festivals spent more than £386 million in 2017 - with non-ticketing spend accounting for £238 million of that figure. In 2014 £296 million was generated in total audience spend, meaning an increase of 30% in the last three years, due in part to the growth of AIF's membership.

This total spend is based on audience figures of 800,000 people across AIF Member festivals in 2017, and an average spend of £483.14 reported by survey respondents.

Much of this is spent along the supply chain, making a significant contribution to local economies - in 2017 festival goers spent an estimated £34.7 million in the local area of the festival they attended.



Non-Ticketing Spends Are Booming

Since 2009 when we began tracking audience spends, average spend has increased by around one third - from £364.17 in 2009 to £483.14 in 2017. Over this period, the amount spent on festival tickets has increased only modestly, from £154.09 in 2009 to £185.89 in 2017 (20.6% up) while spending on accommodation has boomed, rising steadily over the period from just £24.23 per head in 2009 to more than double - £54.59 - in 2017. Spending on food & drink has risen 40.5% over the same period with the average festival attendee spending £115.58 in 2017, while travel costs have increased by just 7.3%. Off-site spending - the money that festival goers spend to get ready for their festival experience - has also seen sharp growth. In 2009 this was just £19.93 a head, rising to £32.61 in 2017.

Festivals As Staycations

46.5%

of AIF member festival audiences said that they choose to attend UK Festivals rather than take a summer holiday abroad with 33.8% of people saying attend festivals as well as an overseas holiday.

Spend Per Head (10 year average)

£434.14

Averaged across ten years, festival goers spent £434.14 each including festival tickets, accommodation, food & drink, merch and off-site spending.

"Should Police have a presence on festival sites?"

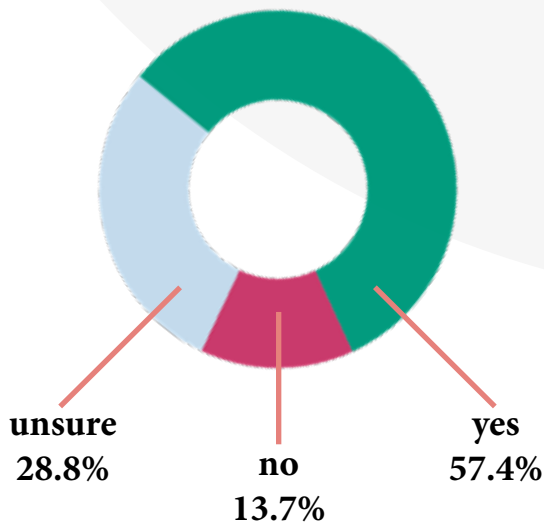


2017 – 98.4% said "no" and 1.6% said "yes"

"Have you ever been a victim of crime at a Festival?"

2007 – 84.3% said "no" and 15.7% said "yes"

Would you welcome Multi Agency Safety Testing (MAST) onsite?



Police at Festivals

65%

of festival goers welcome the presence of police at festivals - with around 18% saying that it makes them feel safer. Just 3% of people think it is a waste of police resources.

Victims of Crime

1.6%

of respondents experienced crime at a festival in 2017, representing a huge drop since 2008 when 15.7% said that they had experienced crime at a festival.

Community Duty

25%

of people surveyed in 2017 said that they thought police presence at festivals was "part of the police's duty for community services".

Festival Security

24.5%

of people surveyed over the past five years say that they think festival security is effective and that additional police on site would not make a significant difference.

MAST Testing

57.4%

of people welcome Multi-Agency Safety Testing of drugs at festivals while only 13.7% - roughly one in eight people - said they would not like to see it. 28.8% remain unsure.

TEN YEARS OF TRENDS

It's probably not a huge surprise that people are a fundamental part of the festival experience; the shared experience of attending a festival with friends and building out-of-time memories with people is one of the things that defines festival life. However, as festivals have evolved, this has become more important than ever.

People are a big part of what makes the festival experience while music is not the most important thing.

There's been a significant rise over the decade in people saying that "camping with friends" and the "people attending the festival" is a key part of their experience - and this vastly outstrips the importance of headliners.

When we asked "What are the top 4 things you enjoy most during your festival experience" "camping with friends" has grown from just 20.7% in 2007 to 29.3% in 2017 - a 50% rise while "people attending" has risen from just 11% in 2008 to 17.5% in 2017, again, a significant rise. Combined, these "people focused" elements of the festival experience account for a bigger share of attention than headliners, which get only 21% of the vote. This number remains fairly static over the years, varying only a percentage point of two from this average.

When asked to identify the single most important factor when buying a ticket "general atmosphere, quality and character of the event" outstrips all other options, averaging 53% over the ten year period. In fact, each year this comes out as one of the four things respondents enjoy most. Starting in 2007 with an incredible 50% of people voting for this, it has fallen slightly over the years but remains steady at around 40%.

This fall is probably not that significant though - it may simply reflect the changing nature of festivals, as over the same period, the significance people place on Theatre/Comedy, Art Installations and Workshops has risen considerably, with each of these aspects seeing a rise from 7-8% in 2007 to 10.5% (for theatre) and 14.4% for art installations and comedy in 2017 - so in some cases nearly doubling in popularity.

"Music generally" though remains a fairly constant reason for people to visit festivals, consistently coming out second highest across the years. Festivals though, are social events, and music



is best enjoyed with friends. People attend festivals to escape from normality, and build lasting memories; the rich mix of activities on offer is clearly becoming more and more important each year, and festival promoters should look at how they can enhance the social elements of the festivals they run.

Social Media dominates people's awareness of festivals - what are the consequences of this for festival marketers?

In terms of marketing and awareness, social media dominates people awareness of festivals - and this has risen meteorically over the decade, from 34% in 2008 to 73.5% in 2017. At the same time, people's reliance on magazines and newspapers has plunged from 37.8% in 2007 to just 13.6% in 2017, while billboards have fallen from 17.4% in 2010 (when we started tracking this number) to just 11.1% in 2017.

This raises interesting questions about how festivals should be engaging with audiences in the run up to events, but also means that festivals are increasingly reliant on communications channels that they don't own or control.

In a period when there's been a lot of negativity surrounding Facebook and Twitter and rules change regularly this is something that festivals need to consider as they look towards the next decade - and the inevitable evolution of communication and technology that this period will bring.

Public transport use is falling - and incentives don't have a huge impact on people's behaviour.

People are resistant to using public transport to get to festivals: fewer people are car sharing, and the number of people using trains has fallen sharply from 18.3% in 2007 to just 7.9% in 2017. In the same time period there's been a sharp rise in the number of people travelling with 2 or fewer people in a car. The biggest driver for more sustainable transport would come in the form of fast track entry - with a relatively steady ~30% of people saying this would get them to use public transport.



Somewhat depressingly though a similar number of people say that nothing would change their behaviour on this - and depending on year these outweigh the people saying fast track would do it.

That said, there are two interesting points here - clear info on public transport is a pretty steady driver with around 12% of people each year saying this would help them choose public transport. Ability to rent camping gear/preferential treatment for campaign sites - when aggregated - are potentially a significant driver of change, and perhaps something festivals should be focusing on.

Campervans are booming.

Both in terms of where people sleep, and how people travel, Campervans have seen significant growth over the past decade, from just 4.5% staying in camper vans in 2007 to 11.8% last year.

For festivals where camping is an integral part of the experience, this emerging trend offers potential to enhance that experience for certain customers, and perhaps reflects a trend toward more luxurious festival experiences, mirroring the popularity of boutique camping areas, glamping and "destination" camping.

At the same time, increased numbers of camper vans may represent logistical and technical challenges for festivals - and, obviously, there is a potentially significant environmental cost in encouraging larger numbers of camper vans at your festival.

Police make people feel safer, and see policing at festivals as part of the police force's duty to the community.

People's trust in policing wavers year on year, but most people are in favour of police being present on festival sites, with the most significant driver being that police presence helps people feel safer. In 2017 22% of people said that they welcome the presence of police on festival sites "because it makes me feel safer". A significant number of people see this as part of the police force's duty to the community - 25.3% in 2017 - while they do not see police presence having a significant effect in reducing crime, with only 12.7% of people picking this option.

On the flip side, of those people who said that police do not need to have a presence at festivals the primary reason for this answer - 24.5% of people - was that festival security was doing a good job already - an encouraging endorsement of AIF member festivals' commitment to onsite safety.

Crime at festivals has fallen considerably over the decade - in 2007 15.7% of people experienced crime at the festival they attended, with robbery, tent theft and assault making up the bulk of crime. By 2017 this had dropped to just 1.6% of people.

// HIGHLIGHT //

FESTIVAL CONGRESS

Festival Congress is the AIF's annual flagship event, and largest gathering of independent festivals in the UK.

Following four consecutive sold-out events since the first event in 2014, the Congress has rapidly evolved to become a fixture and must-attend event in the festival industry calendar, with over 400 industry delegates attending each year.

This year the Congress is taking place in our

new home in Sheffield, following four years in Cardiff.

The conference has a progressive and innovative format, including high profile keynotes, engaging panel sessions, TED x style quick fire talks, breakout workshops and fireside chats with experts and inspiring personalities from across the festival and events world. Speakers at the event have included Jude Kelly OBE (Former Artistic Director, Southbank Centre), Huw Stephens (Radio One/Sŵn Festival), Zac Fox (Kilimanjaro Live), Robert Richards (Commercial Director, Glastonbury), Simon Parkes (Founder, Brixton Academy), Professor Tim O'Brien (Jodrell Bank), John McGrath (Artistic Director, Manchester International Festival), Fabien Riggall (Founder, Secret Cinema) and Kaye Dunnings (Creative Director, Shangri la).

In addition, the festival-style street food catering and now legendary evening party and independent festival awards are an ideal way for the industry to celebrate at the end of the season alongside plotting future collaborations.

The Independent Festival Awards are an increasingly prestigious fixture in the industry calendar, with previous winners including End of the Road, Bluedot, Secret Garden Party Founder Freddie Fellowes, Boomtown Fair, Slaves, Arcadia and Shambala.



Festival Congress - Photographer: Gareth Bull

Festival Congress Objectives

To create groundbreaking content and be a genuine forum for debate

To balance covering the "nuts and bolts" of organising festivals and events with reflecting the incredible creativity of the industry

To contribute to the evolution of the industry and challenge established notions of what an industry conference and awards can be

To celebrate the work of our members and the wider festival industry, creating a unique connection point for promoters and their teams, suppliers and those interested in the industry

Stats from 2017

Sold out events from 2014-2017 with 449 overall attendees in 2017

In 2017, 83% of 64 AIF members engaged with Festival Congress

Attendees were 39% male, 61% female attendees

Majority of attendees aged between 25 and 44

From 2014-2017, 89% of attendees were from outside Wales - this is an event the industry attends from across the UK

90% said the quality of the panels was "excellent" or "good"

93% said they would attend again

86% said the cost of attending was good value



Drastic on Plastic

Since plastic was invented a mind boggling 8.3 billion metric tonnes of plastic has been produced - with 6.3 billion metric tonnes of that ending up as plastic waste, and only 9% of that waste being recycled. However you look at it, plastic waste is a huge problem; this was brought to public attention recently, through the BBC's "Blue Planet II", but for many festivals plastic waste is something that has been an issue for a number of years.

Drastic On Plastic was launched by the AIF in April this year asking member festivals to pledge to eliminate all single use plastics from their festivals by 2021



38.5 million plastic bottles are used in the UK every day and 91% of that plastic is not recyclable. According to the Ellen MacArthur Foundation, by 2050, it is estimated that there will be more plastic than fish in the ocean.

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In a festival specific context, 23,500 tonnes of waste are generated at camping festivals each year, with audiences consuming an estimated 10 million plastic bottles annually at events. So we obviously have a huge collective responsibility when building these temporary towns and cities in fields. For the Drastic on Plastic campaign, AIF partnered with Raw Foundation, a charity that operates on a global level to educate, engage and empower people to move towards sustainable consumption and production.

Participating festival websites were digitally 'wrapped in plastic' for 24 hours of Earth Day on 22nd April 2018, with a core message of 'Reuse not single-use' and visitors pointed towards various info and resources, such as the Raw foundation festival goers guide to plastics.

Visitors could also buy limited edition branded steel bottle in advance of season, encouraging them to actually take some action. Various member festivals also participated in buying bulk bottles from Raw foundation with an AIF discount.



All participating festivals made a commitment to the Bestival led 'Final Straw' initiative, banning the use of plastic straws on their sites in 2018 as a minimum step, if they hadn't already done so.

Participating AIF members signed a three-year pledge to eliminate single use plastics from their events by 2021.

As an AIF member participating in this campaign, we the undersigned recognise the devastating impacts that the prolific use of single-use plastics is causing in the environment on a global scale.

We also recognise the leadership role that festivals and events/the festival community can play in inspiring and driving forward positive, solutions-focused change towards a sustainable future.

We pledge to eliminate single-use plastics (e.g bottles and straws) at our event(s) within 3 years by 2021, and to promote reuse solutions wherever practically possible

The campaign had incredible and global media impact, with pick-up across major outlets including BBC Newsbeat, the Press Association, BBC 5 live, Sky News and many more, also achieving over 15 million impressions on twitter alone.

More importantly, the campaign has been influential to the operational practice of many member festivals and pushed plastics further up their agendas. It's a long-term commitment to the issue and we are now monitoring member progress through surveys, initiative trackers and individual conversations to ensure we stay on track with the three-year pledge.

Drastic on Plastic is a strong example of how festivals can take collective action to capture a moment, acting as a platform for influencing audience behaviour, effecting positive change.

// PROCESS //

ELIMINATING PLASTICS ACTION PLAN

There are a number of key things festivals can do to make a significant difference in the amount of plastic that is used at their events. Incremental change is the best way to start, but there are a number of "low hanging fruit" where it is easy to make quick changes that have big impact.



Ban Water Bottles

Ban sales onsite across all concessions and instead of offering water in single-use plastic bottles promote and sell reusable water bottles instead - with an increased number of drinking water points for people to refill.



Eliminate Straws

Follow Bestival's lead and ban straws. It's a great first step, and signals commitment to change. Almost no-one needs a straw in their drink, and for drinks where it is essential use cardboard straws.



Proper Eating Utensils

Cutlery and serving ware that is reusable, compostable or made from metal, glass, paper, card or wood is a much better alternative to plastic - and is often much nicer for festival goers to use.



Reusable Signs & Badges

For accreditation items such as lanyard and security badges consider reusable rather than event-specific items. Simply removing the year or date can make a big difference to being able to reuse these items.

// Plastics to Eliminate //

- Water bottles
- Straws
- Cutlery
- Stirrers

- Cups
- Plates
- Food Containers
- Glitter

- Tents
- Cable ties
- PVC Banners
- Refuse Bags

- Laminated Badges
- Security Passes
- Lanyards
- Disposable wipes



IN CONVERSATION: Chris Johnson of Shambala on Collective Action and Sustainability

The first Shambala was literally 150 of us in a field with the farmer's trailer, a PA and a couple of portaloos. Towards the end of being at University, we were the kind of folk who have big house parties, and we thought 'let's do something outside'. We had a lot of fun, but I don't think any of us really thought about whether we would be running a festival. We just had a party in a field. And it was fun, so we did it again - and again, and again. I think that's a familiar story for AIF. That's how a lot of the festivals began.

We didn't set the festival up to change the world or to be pioneeringly environmental, but as happens in life we

grew up we had children, our focus changed; now, for the last ten years our focus is very purposefully an offering to the world, and as festival organisers we have a shared purpose.

We're deeply committed to what Shambala is in terms of leading the sector in terms of sustainability and sending people back from the festival with as much as we can possibly offer them in terms of inspiration about how we can work together for a better future.

As festival organisers we believe you have a great deal of influence on the culture of your festival. We are painstaking in listening to what improvements we can make. Our audience appreciate an honest dialogue rather than being marketed to. We're all in this world where we are constantly being marketed to, so we see what we do at Shambala as this brief moment where we can go somewhere without any commercial agendas and be free from that and just be human and celebrate.

We like to talk about difficult stuff. We took meat and fish completely off the menu to deliberately provoke some discussion about how our diet is shaping the world around us. People said "It's easy for you to do that" but it's not really - 70 percent or more of our audience are

meat eaters, and a percentage of them were furious that we dared to challenge their right to choose. But actually, that has continued in 2017 and 2018 - we gave the audience the choice, and the audience has chosen to remain meat and fish free. We actually held a mock trial, but then also in the audience survey we put it to the vote, and the audience voted to remain meat and fish free. We've also had an insect bar - obviously, that was a bit of fun, but also makes a serious point. Each of these provocations is to open up a discussion around something.

Our focus on sustainability is about having the least negative impact on the environment that is possible; but I think it's also important to recognise that almost all of the sustainability initiatives that we have successfully delivered have been cost positive.

Putting in place an initiative about sustainability, some things might cost a little bit more, but others might cost a little bit less - you take it all together. My board take finances very seriously - we're not a charity, we're a business. So everything has to stack up. There's this misconception in the festival world that sustainability costs money. Yes, you do have to invest, we have to invest in anything, but in the way that people normally approach business in every way that you would invest in something to see a return, that basic tenet seems to be absent from people's approach to sustainability, which I find mind boggling.

The Drastic On Plastics initiative in which almost every AIF festival has pledged to be single use plastic free by 2021 is significant. If we can have a positive experience of making these changes then it will act as a gateway into the partnership broadening its approach to sustainability, and I think there is a real opportunity for that.

If I'm honest, phasing out plastics is not rocket science. There are some tough decisions around revenue - bottled water, it's hugely profitable, so some people are holding on to that for as long as they possibly can, in the face of its increasing unacceptability, even by audiences. There are some difficult cost decisions, but it's a question of working with your different stakeholders, your supply chain, your concessions on site and your own team.

At Shambala this year we only bought and supplied reusable cable ties for the build. Like for like, those reusable ties are just as robust - but it takes more time. At the end of a festival, people can't just take a knife with them and rip them off - with reusable ties you're talking about someone not just ripping it off, but taking it off. So there is a time implication.

Some of these changes can happen overnight, some of them are going to take time. But what's great is the pledge and the aim of Drastic on Plastics is a very clear aim and a very realistic time scale. If we all move together, the supply chain has to move with us. And this is where the AIF as an organisation can have a bold vision. There's a choice for us to be the membership association that has a vision and is one step ahead, and inspires change across the sector.

At times the festival sector at large has been behind the curve with sustainability compared with a lot of other sectors. I think we've got an opportunity with drastic on plastic to set us on a better course. Festival owners can do simple things to begin to make changes. Look at energy - most people can save money by making a few straightforward changes. Adopt reusable cups - there are now companies that reliably provide that service. And get a sustainable travel plan in place.

As first step, people should measure their baseline - there's a fantastic tool called the creative industry green tool. It asks you a bunch of questions; for the sake of a couple of hours you can get your baseline and get an idea of what your environmental impacts are in terms of emissions, and get your carbon footprint, and then you can begin to implement change, and measure those changes.

I think for change to happen in the industry people need resources and guidance. A part of that is learning from each other's experiences. Case studies are important, networking opportunities are important, keeping a conversation alive in the industry is important, featuring it in events like the Congress; all of these things are needed so that change can happen.

I think sustainability is so important and so separate from commercial interests that we need to get together as a wider industry and drive that agenda. We can be hugely more successful on things like this if we pool our resources and look at an industry wide strategy to look at what resources people need so that all of our members, and events of different types have the confidence and knowledge to make the changes needed.



Shamabala - Photographer: George Harrison

"Being a member of AIF invaluable to Sound City, as an independent festival it's great to be part of a membership organisation that has our ideals and values at heart. Paul and his team have been so supportive and have campaigned tirelessly for a lower festival tariff with PRS which is in itself worth the membership alone, as well as bringing other key issues into the spotlight like safer spaces at festivals and reducing the use of plastic across festival sites. We're proud to be members."

Becky Ayes, MD, Sound City.

"As founder and director of ArcTanGent festival, the AIF membership has given me plenty of knowledge and insight into the festival industry which has facilitated better planning for the festival. Despite the fact the other festivals are technically 'competition', the AIF members provide a support network amongst the organisers and an open platform in which to talk to each regarding festival related issues, success and planning. As an organisation the AIF collectively and successfully fights bigger campaigns that individually, small independent festival would not be able to achieve alone. The independent festival industry is very much dependent on the support of the AIF, the campaigns it fights and the members it has, so strategically planning the future of the AIF in my role as Vice Chair is integral to seeing the UK independent festival industry continue to thrive."

Goc O'Callaghan, ArcTanGent.

"Fairport's Cropredy Convention joined the AIF in 2014 and the benefits were evident immediately. The sense of purpose and unity was obvious at the first AIF Congress I attended. In those few short years, the AIF has assisted its members in reaching satisfactory conclusions with, among many other issues, GDPR, HMRC (Business Rates and VAT on Concessions) and the new PRS tariffs. AIF initiatives such as Safer Spaces, Drastic on Plastic and Fair Play For Festivals which benefit both the festivals and our customers plus the advisory seminars at Lewis Silkin and the regular industry bulletins have proved invaluable. We seriously don't know what is waiting for us next year - but I feel a lot more confident for the future of our industry with the AIF fighting our corner."

Gareth Williams, Fairport's Cropredy Convention

"Becoming an AIF member was invaluable for our business, especially as we expanded to multiple festivals. The AIF team work tirelessly to offer a support network to events organisers, facilitating the crucial share of information and allowing the independent festival sector to have a stronger voice in the industry."

Andy Smith, Director, From the Fields (Kendal Calling, Bluedot, Off the Record)

"This is a club formed by people who don't want to be in a club. It allows events to be Independent in thought in thought and practice with a support system that actually gives them a chance."

Freddie Fellowes, Founder, Secret Garden Party.

// AIF CAMPAIGNS //

SAFER SPACES OVERVIEW

Our Safer Spaces campaign aims to raise greater awareness about sexual violence, from audiences to artists to staff and volunteers - and to spread some key messages around consent, not being a bystander and for festival to reiterate a “zero tolerance” approach to all forms of sexual assault. We define sexual assault as “any unwanted sexual act or activity”.



2000trees - Photographer: Dom Measons

There are many different kinds of sexual violence including but not restricted to rape, sexual assault and sexual harassment.

Sexual assault can happen to anyone, anywhere and at any time. According to Rape Crisis England & Wales more than half a million adults are sexually assaulted each year but only 15% of these victims choose to report it to the police. Due to this underreporting, there's no evidence to suggest that this happens more or less at festivals compared to anywhere else. However, there have been some highly publicised incidents over the past few years so festival organisers felt it was time to address what they are doing in a meaningful and impactful way.

For this campaign, we took invaluable guidance and advice around messaging and information from key campaign partners including Rape Crisis England & Wales, The White Ribbon Campaign, Girls Against, Safe Gigs for Women, Kelly Bennaton (DHP Family) and festival welfare & safety expert Penny Mellor.

Over 30 festivals participated in a 24 hour 'blackout' of their websites, displaying a GIF with the core messages of the campaign. In addition, participating festivals signed have signed a Charter of Best Practice committing to uphold best practice through a series of measures including provision of welfare services, staff training and taking a victim-led approach to sexual assault incidents.

The estimated reach of the campaign on twitter was over 18 million, over 9 million on Facebook and over 35,000 on Instagram. It attracted global media attention, with almost 50 media outlets and external organisations posting about or sharing the campaign on social media including Rolling Stone, Pitchfork, BBC, The Guardian and Broadly.

National research from YouGov this year revealed that one in five festivalgoers – and more than two in five of those who are female and under 40 – say they have been sexually assaulted or harassed at a UK festival, according to a survey. AIF's audience research for 2017 showed that 4.4% of respondents had experienced an incident of sexual

assault or harassment at a festival - with only 15.3% (in line with the national average) of those people reporting the incident - often because they felt nothing would be done. We're now focussing on the next steps, which means holding signatories to minimum requirements around the Charter of Best Practice, monitoring activity, providing assets so that the campaign can hopefully have an onsite presence and providing further training opportunities for members.

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At last year's Festival Congress AIF convened a panel to reflect on the safer spaces campaign and explore impact and next steps.

"Sexual violence happens anywhere and everywhere" says Rebecca Hitchen, Operations Coordinator for Rape Crisis in England and Wales. "It also carries a really huge stigma so any campaigns that are working to improve the experiences of woman and girls by breaking down that stigma are campaigns we are really interested to be involved in."

More than half a million adults are assaulted in the UK every year, but only 15% of those people choose to report it to the police. "There are so many barriers to speaking out about sexual violence most of which tie into the fact that women and girls generally aren't believed" says Rebecca. "We live in a society which is victim shaming and victim blaming. So if you are going to speak out you know that you might not be met with support. We also know that there is a huge rate of attrition; of those 15% of people that do speak out, only 7% of those results in guilty convictions in court. When you also consider the other potential ramifications in your personal life and social environment then it becomes a very difficult decision to make."

"In terms of prevention we would like to see that festivals are using things like social media, every tool at their disposal to start having a conversation before their event even starts," says Tracey Wise, of Safe Gigs For Women.

"Festivals need to say we will not tolerate sexual assault or sexual harassment at our event and if you are found to be a perpetrator of this kind of behaviour we will throw you out, just as we would if you were found committing violence, if you were caught thieving, or any other sort of disturbance."

It's not always cut and dried though. "One interesting thing is the case of upskirting" says Kate Lloyd of TimeOut. "There was a man in the crowd at a London festival. He was trying to approach a woman and she dismissed him and then he started taking photos up her skirt. Her reaction was that she wanted to press charges, but then realised that upskirting is not actually illegal. I think one of the great things about the Safer Spaces campaign is that it's being really proactive and doing more than the law asks. I think that specific example proves that the law doesn't support women enough at all. I think this is an area where we can be super forward-thinking".

Encouraging victims to feel safe so that they report things straight away - rather than waiting until they get home is important. "I think it's really difficult for festivals to encourage people to speak out," says Ami Lord from Standon Calling. "When most of what a festival is communicating is to try and sell tickets, it's a negative thing for a festival to speak about. It's a difficult thing to broach - particularly in advance of the festival - there's a perception that people might sit up and say 'why are you talking about this, is this something that happens a lot at your festival'. That's why we have found the campaign so appealing because it is a way that explains very clearly, with a positive and proactive message that if you see or experience sexual assault at our festival you need to speak to a member of security or somebody else from the festival and we will take it seriously."

"I think it would be good to have a way to report stuff like groping really quickly, and log it" says Kate. "I think part of the issue with the lack of data around sexual violence and harassment at events is that stuff like groping, someone putting their hand up your skirt, someone shouting something sexually aggressive at you, those things often don't get reported because reporting them is often more hassle for the victim, and you're just going to want to get on and have a good time."

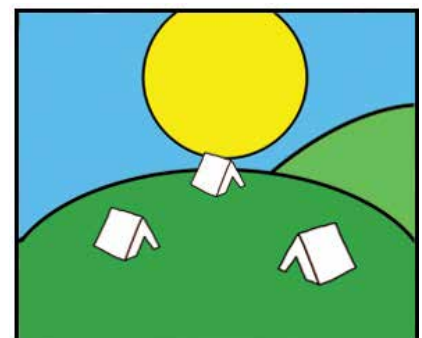
Sexual assault is not just about audiences. “Festivals are complex things” says Tracey. “There are so many outside agencies coming in and that’s why this has got to be an all year round campaign. You’ve got to talk to the bodies that you bring in to help with your festival as well.”

“We talk to our security company - they work on a lot of festivals. Our head of security will tell staff to take sexual assault seriously. It is definitely good for festivals to work more closely with their security teams and for them to be educated - but it’s difficult to know where to get that resource as well.”

Rebecca agrees. “To effect change and implement a strategy of zero tolerance and bystander interventions needs resources, like anything would. Signing up to a campaign and being a signatory to a charter is fantastic and it’s such a massive step, but I think there is then the need to go a step further and be reviewing policies and thinking about things from the survivors experience.”

“I think talking to women who come to festivals and asking them what would make them feel safer and make it easier for them to report, and thinking practically - if your festival is really big, is it going to take someone walking the whole length of the festival to report something?” says Kate. “Is it going to be that it’s 4am in the morning and they are a bit mashed and are scared to report something in case they get in trouble for taking drugs. Thinking about all those little practical things that might be making people afraid to report things.”

“I think part of why this campaign is so valuable is because festivals are saying they are going to be proactive,” says Rebecca. “And are saying even though there may have been no reports at a particular festival we’re going to do what we can to try and prevent it happening and try and let survivors know that if there is an incident we know how to respond appropriately.”





AIF asked member festivals to sign up to a charter of best practice regarding sexual assault at festivals.

The charter states that all festival and event organisers should strive to create a safe and enjoyable environment for audiences and take active measures regarding incidents of sexual assault onsite.

Festivals are asked to commit to uphold best practice through the following steps:

Zero tolerance to sexual assault

To make it clear to all attendees, staff & artists that the festival has a zero tolerance policy towards sexual assault – this is defined for the purposes of this charter as “Any unwanted sexual act or activity”. According to Rape Crisis England & Wales, there are many different kinds of sexual violence, including but not limited to: rape, sexual assault, child sexual abuse, sexual harassment, rape within marriage/relationships, forced marriage, so-called honour-based violence, female genital mutilation, trafficking, sexual exploitation, and ritual abuse. Suspects of such offences will be pursued and may be ejected from the festival - Organisers will work with the police to support an investigation and charging decision.

Consent

To promote at all times the principle of consent with regard to sexual activity onsite.

A victim led approach

To always respond to reports of harassment and sexual violence from a place of belief and to take a victim led approach, with support services available onsite.

Training

To train all staff and volunteers in issues concerning sexual violence and have the following elements in place, with training delivered or overseen by specialist providers:

- A) Prevention – raising awareness and training including awareness of relevant facilities available on site.
- B) Reporting procedure and actions – To produce clear guidelines for scenarios, built into Safety Advisory Groups (SAGs) and event safety management plans, table top exercises, welfare policies and staff training.
- C) Support – To work with the wider agencies such as Police, ambulance, welfare and security contractors and other relevant agencies to support victims and staff.

Awareness

To encourage attendees, staff, performers and volunteers to be aware and to not be a bystander to sexual violence or intimidation. To promote this through onsite messaging and pre- event information.

Festivals & Customer Experience

Something Extraordinary -
Delivering Outstanding Customer Experience

“When we started Boomtown, Chris (Rutherford) and I were basically a couple of ravers, with a load of Bristol raver friends,” says Lak Mitchell, co-director of Boomtown Festival. “We didn’t have a single penny, so it had to work financially. We saw a gap, we

had a pretty ambitious vision, and a heap of creative friends.” Ten years on that ambitious vision is driving 60,000 ticket sales a year and has helped redefine what the festival experience means. For any event, delivering a high quality experience is key, but for festivals - which hope to build loyal audiences who return year on year, customer experience is paramount.

“Marketing is what sells tickets for festivals, but what you do on site is what keeps those ticket buyers coming back” says Jim Mawdsley, AIF Chair.

“You can definitely market to get people there, but if they don’t feel it when they’re there then it’s very hard to get them back,” agrees Becky Ayres, MD of Sound City in Liverpool. “Customers are so discerning now, there’s so much choice available - not only from festivals, but from so many different forms of entertainment.”

“Marketing is what sells tickets for festivals but what you do on site is what keeps them coming back...”



Kendal Calling - Photographer: Scott Salt

“For any successful festival there are a hundred little things at play that contribute towards building loyalty,” says Alex Thomson of Green House Group, a marketing agency that works with a number of festivals including End Of The Road, 2000trees and Rockaway Beach. “A lot of festivals rely on repeat attendees, and if somebody has a bad experience, for whatever reason, they might decide it’s their final visit.”

AIF research shows that for most festival goers the general atmosphere and overall vibe, character and quality of a festival is more important than music. In fact, over the ten years we have been tracking these numbers, an average of 53% of people say this is the single most important factor they consider when buying a ticket, while only 27% say music is the biggest part of their experience.

“When we do audience surveys it’s the ethos and sense of

"A lot of festivals rely on repeat attendees and if somebody has a bad experience, for whatever reason they might decide it's their final visit..."

community as well as the bewilderingly diverse entertainment and workshops that people strongly identify with,” says Shambala Co-Founder Chris Johnson. “Music is way down the list. But that’s not to say that we’re not proud of the musical offering. We don’t go for the biggest acts, because it’s not where we’re positioned, we try and find interesting music.”

“Yes there are festivals where you can turn up, buy a beer and watch a few bands,” says Jim, “and that’s great if that’s what you want to do. But I think the festivals that have done really well and been really significant in the last few years are the ones that have those immersive experiences.”

“What audiences are looking for has changed,” continues Alex Trenchard, Founder of Standon Calling. “I think people are much more increasingly look for experiences rather than necessarily going to see the next massive act. They are about time away from having to be in a certain place at a certain time.”

“There’s an escapism to going to a festival - you let go in a way

Standon Calling - Photographer: Giles Smith



that you maybe wouldn’t in normal life,” says Becky. “I think lots of people don’t necessarily just go for the music.”

Getting the balance between enough music, the right kind of music and overall experience can be tough, and festivals need to be innovative in their approach to get it right.

Alex Thomson says “The festivals I work with have really honed in on the listening habits of their audience. Being smaller, they have to be more careful, creative and considered with who they book. By contrast I’ve worked with some festivals who have tried to cater for too many styles and ultimately lost their audience.”

It’s a fine balancing act, but that does not mean that there is a not a space for a diverse musical programme. In fact, says Lak, that can be a benefit.

“When we do surveys, we ask people who they want to see. They say things like ‘I want to see this psychedelic trance artist but I also want to see this heavy metal artist, that punk band and this folk musician. It always surprises me how eclectic the audience are now. When we started out you would have a techno festival, or a house festival, a drum’n’bass festival, band festivals, heavy metal festivals. We kind of screwed that whole rule book up and basically just chucked the lot in together and now to get to the psychedelic trance stage you have to walk past the heavy metal stage.”

Having a clear understanding of what your audience wants is very important, and embracing feedback to enhance the event



Boomtown - Photographer: Mike Massaro

for that core of ticket buyers who represent your year-on-year return audience is key.

"Each year we'll do an audience survey, and we are quite painstaking in listening to what improvements we can make," says Chris. "We know from feedback that our audience appreciate that as an honest dialogue. Rather than marketing to them, we are in honest conversation and that's fundamentally different in terms of the relationship."

"For a few years we did go after bigger headliners," says Becky "but we found it increasingly hard to compete against the larger festival companies like Live Nation, Global and Broadwick - we didn't have the buying power with artists and agents as those bigger festivals. We found after surveying our audiences when we were ten years in that what they really loved was the discovery aspect of seeing people like Ed Sheeran and Stormzy when they were in really small venues and relatively unknown, so we decided that we'd return to that model."

"You want a festival to be an area of discovery," Jim concludes. "You want it to be a multiple cultural offering, you want to be able to go there and experience new things, As festivals become more and more a part of mainstream cultural experience attended by a broader demographic, getting an offering that caters to that broader audience is a strong measure of success."

"I remember when I first started going to festivals when I was 16 - a long time ago - festivals were just something that were for alternative indie kids," says Becky. "Now there are so many people of all ages that go to festivals, so many families, there are festivals with huge demographics represented in them."

"Our demographic is very broad," says Chris. "People do sometimes say 'Oh, you know, you've just got a bunch of greenies over there' but actually that's not the case, it's quite a cross section of society. There's people with young babies, through to sixty year olds, and everyone in between."

"Standon Calling is a kind of twisted garden fête which during the day is a very family friendly event and then flips at night into a more hedonistic late night affair when people with kids get their kids to bed and join those without kids to party through to the early hours," says Alex Trenchard.

"We get a lot of people from London, from the local area, and from abroad," he continues. "That mix of people creates an atmosphere with a sense of openness and inclusivity."

One thing that seems to unite demographically broad and diverse audiences is immersive experience. "You want to go and be somewhere with your friends or family that offers something so culturally different that you're not going to get it anywhere else," says Jim.

"What we created was a step beyond what we felt the average festival was and that got the audience excited and brought them back each year. There was always a vision to go above and beyond," says Lak. "It's very much an immersive experience and the idea is that as soon as the audience come into the city they are part of the show and part of the experience."

"We create an experience for our audience primarily through what we call our story," says Alex Trenchard. "The story is an annual theme - we dress the whole site to that theme, and the audience will create their own costumes, and that also helps bring everyone together."

Immersive experience needn't be the all-out theatrical experience of festivals like Boomtown, Standon Calling or Shambala though. "We're fortunate to be based in the Baltic Triangle in Liverpool," says Becky. "It's a great area - people can go from one venue to another within a very short space of time and that does create quite an immersive experience."

"At Kendal Calling a few years ago I did an area that you went to at night time that was full of immersive art," says Jim. "You've watched a band in the day, then at night you can go and have a look around and have a few drinks, with little tents here and there, a little stage."

"The things that you take back every year are the things that you see at two in the morning in a little tent" says Alex Trenchard. "People coming together and having a great time, those late night experiences that you can only get at a festival. For me, that's the highlight of a festival."

"You want a festival to be an area of discovery," Jim concludes. "You want it to be a multiple cultural offering, you want to be able to go there and experience new things, almost in a bohemian way, to step out of reality. Those festivals that are built on that and really consider that, and keep investing in that are the ones that have the edge."



// AIF INITIATIVES //

MAST: What is it?

The Loop, founded by Professor Fiona Measham and Wilf Gregory introduced 'Multi Agency Safety Testing' (MAST) to the UK in the summer of 2016. Prior to this, from 2010 onwards, Professor Measham had shadowed academic, police and Home Office scientists who tested drugs on site at festivals primarily for evidential and intelligence purposes. Fiona saw the utility of extending this forensic testing to help reduce drug-related harm on site through the provision of 'front of house testing' or 'drug checking', as has happened for decades in some European countries.

1**On-site Drug Safety Testing**

Festival goers can submit samples of drugs for on site testing by a team of experienced volunteer chemists, helping identify substances of concern that may put users at a greater level of risk.

2**Information**

Welfare staff at festivals have more and better information about drugs that may be circulating on site, helping them provide informed and targeted treatment and to minimise the risk of public safety incidents.

3**Harm Reduction**

MAST links harm reduction advice directly with forensic testing of individual samples of drugs provided by festival goers, offering an opportunity to intervene where drugs have been mis-sold or are high strength.

// FEATURE //

THE LOOP: MULTI AGENCY SAFETY TESTING

The Loop started in 2013 as an initiative between Fiona Measham, Professor of Criminology at Durham University and Wilf Gregory a DJ and Promoter. “I was coming at this from an academic perspective,” says Professor Measham. “I’ve been doing research for 25 years on changing trends in drug use - and particularly recreational drug use. Often I feel frustrated at the lack of harm reduction

services for people.” Currently, most drug services in the UK are focused on recovery, and helping people who are dependent on drugs in their daily lives - and over the past decade there’s been declining of funding for harm reduction services at a central level. “It seems to me really important to catch people early in their ‘drug taking careers’ - 95% of drug users are not daily dependent users, and for them the help and support they might get at an early stage might help divert away from more serious problems later on.”

From the start, The Loop was very much about linking academic research with service delivery, and doing everything from a strongly evidence based position. Starting from doing research at festivals in 2010, Professor Measham started a harm reduction service in night clubs and festivals, offering drug users advice and support - and as part of this felt that substance testing offered a way to give much better advice, directly grounded in what drug someone has taken, rather than what they think they have bought. She says “Having gone to conferences around Europe I’ve been seeing for 25 years there’s been testing in the Netherlands, and for around 20 years in Vienna and some other cities as well. So there are probably five countries now in Europe that have long-standing drug safety testing services, and my thought was ‘why don’t we do this here in the UK?’”



“The festivals we work with are super supportive,” says Professor Measham. “We’ve got a big team that goes on site - often as many as 20 chemists and 20 healthcare professionals. Once festivals see us in operation with queues of people wanting to use the service, they see the value of the work we do.”

With over £100,000 of equipment in a mobile lab, The Loop is well equipped to analyse and work out most substances. While most substances are fairly easy to identify quickly, there are others that are not straight forward. “You have these chemistry conundrums, as we call them, where there is something that we’ve not been able to identify immediately”. This is where having post-doctoral chemists on site helps, who between them can be working out what a particular substance is - or isn’t. “We’re also in partnership with the chemistry department at Durham University, so we can take samples and compare with the lab analysis back there. We are increasingly improving our capabilities in the field, and we’re now working with a manufacturer to develop even better bespoke equipment for use in the field.

About one in five samples brought to the Loop has been mislabeled - it’s not what people expected. About two thirds of people will then hand over that drug for disposal. The other third might take it, but might take a smaller amount. “Often people come to use because they’ve already had a bad time,” says Professor Measham. “About a third of the people we see have had a bad time and want to find out why. If you’re having a bad time at a festival on drugs it’s probably the worst place to be. I think that’s why a not insignificant minority of people will just come and hand those drugs over to us.”

There can be macro economic benefit to the work The Loop does - hopefully drug testing can reduce hospital admissions. If people know what they are taking, and what drugs are in circulation and know the purity of a substance, they can dose more appropriately or avoid substances they don’t want to take at all. This can reduce medical incidents and drug related hospital admissions.

“These are the sorts of things I’m looking at,” says Professor Measham “we’ve got a health economist that we are working with, to understand the macro-analysis, rather than the micro-analysis of different festivals. How much does it cost to set up a testing service, what the benefits might be, and how long does it have to operate for to be able to offset the cost.”

“We’ve had five years of phenomenal growth and success,” continues Professor Measham. “But that’s brought its own challenges which is about what is next: stage two. We have to be whiter than white. What we are doing is very cutting edge, and still very controversial. We need all the stakeholders to believe that we can be trusted handling controlled drugs. Yes we’re testing drugs for people and yes they are illegal, but we’re not saying that they are safe. The safest way to take drugs is not to take them at all. This is about addressing relative risk, about identifying contaminants and adulterants, and the even more tricky message of identifying high strength drugs and trying to address the added risks of high purity.”

For many people, an experience with a drugs harm reduction service like The Loop is the first time that they will have spoken to a medical professional about drug use. “We need to be - and will be - in partnership with health and drug services. When they speak to us, this is normally their first with a healthcare professional about drugs, and once they realize it genuinely confidential, and genuinely non judgmental, they then have 20 more questions that they want to ask about drugs.”

“Most festivals now put a lot of money into having an on site paramedical service; they also now need to think about having a pop-up lab on site. But festivals need to be paying properly if they want a good service, and a proper ethical and responsible testing service. You could do it on the cheap - people will pop out of the woodwork and try to offer a cheap service, we’ve already seen that happening. I think it’s really important that that that the appropriate professionals are conducting delivering the service. You only need to have one inadequate lab or one inadequate chemist or operator and it could be an absolute public health disaster. I think in the future we need to establish a code of practice for good practice and good quality testing. My biggest fear is that there is a race to the bottom on this, because if that happens it will pull the rug out from under everybody.”





AIF are:

Paul Reed — *CEO*

Phoebe Rodwell — *Membership and Projects Coordinator*

Jim Mawsley — *Chair*

Goc O'Callaghan — *Vice Chair*

First and foremost, thank you to all of our AIF member festivals and the Friends of AIF for supporting the work of AIF over the last ten years. It would not be possible without you.

Thanks to AIF staff members during this period including but not limited to: Claire O'Neill, Emmy Buckingham, Katie Malcolmson and Renae Brown.

Thanks to all serving and previous members of the AIF board, all founding members and to Rob da Bank and Ben Turner.

Thanks Alison Wenham, Charlie Phillips and the team at AIM and WIN.

Thanks to Sam Taylor, Jason Wolfe and the team at CMU for compiling and writing this report.

Thanks to all of our supporters and partners on the Festival Congress and other projects over the last five years and to everyone who has attended our events.

