Festivals Forward: Festivals Mean Business 4

British Arts Festivals Association

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BOP Consulting

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Contents

Foreword

Photo credit: Charlotte Graham

Val McDermid

When my first novel was published almost 40 years ago, there were almost no book festivals. Readers seldom had an opportunity to hear their favourite authors or to discover exciting unfamiliar voices. And new writers had no shop window to showcase their work. That I managed to establish a career at all was entirely as a result of supportive booksellers and librarians. The readers they recruited pressed my early works into the hands of receptive friends, and so the word slowly spread.

In recent years, the cultural landscape has been transformed by the growth of festivals. Not just book festivals, but events celebrating music, art, dance, theatre, crafts and comedy. Some are international in their ambition and scale, striving to bring the richness of other cultures to our doorsteps.

Others are much smaller in scale, sometimes deliberately niche in their appeal, providing an opportunity for makers to mix with others, to learn and be inspired, as well as allowing their work to be seen and heard, sometimes for the first time outside their living room.

From Glastonbury to the Pittenweem Art Festival, thousands of hours of programming have brought pleasures to millions of us. Festivals have enriched our lives and along the way, earned substantial economic benefits both locally and nationally.

Many festivals have important outreach programmes, working with schools, prisons and areas of towns and cities where deprivation is a very real part of everyday life. They offer a hope of different possibilities and the chance to make the connections that make those possibilities a reality.

When we launched the Theakstons Old Peculier Crime Writing Festival more than 20 years ago, there was nothing comparable in the UK. We had the backroom support of the already-established Harrogate International Festival which gave us a boost that most start-ups lack. We started quite modestly but we believed the most loved genre of fiction in the UK would find an audience.

Our first programme leaned heavily on the ability of our committee members to persuade their friends to take part. Publishers were initially less keen. (‘Harrogate?

Isn’t that in the North?’) But we found our audience and now the festival is the biggest of its kind in Europe, with attendees pitching up from five continents. It fills hotel rooms and restaurants as well as festival venues, and it’s beloved by its performers as well as its audiences.

The important point I’m making is that it this story is far from unique. The festivals that give us pleasure, food for thought, and the opportunity to meet people who share our passions are often a beacon of light in an otherwise mundane existence. They’re often run by volunteers who devote untold hours to make sure things run smoothly for artists and audiences. Sponsorship is a huge help of course, particularly in times of austerity, but it's hard to find and hard to hold on to.

Preserving our festival heritage and building on it is no frivolous matter. We need the light that celebration gives us. To quote James Oppenheim, ‘Hearts starve as well as bodies: Give us bread, but give us roses too.’

Introduction

Fiona Goh, BAFA Director

We're passionate about the power and potential of arts festivals at BAFA. We believe the work of our members and arts festivals across the UK is extraordinary, often generated by small teams of similarly driven individuals with a passion to create unique experiences, to champion new work, and to enrich their local communities. In commissioning BOP Consulting to tell the story of the UK's arts festivals through its detailed research, BAFA is standing on the shoulders of three previous national research studies in its Festivals Mean Business series of reports.

The last commissioned study was undertaken in 2008 and much has changed for our sector in the last 16 years. BOP's study talks about a sector that is 'surviving rather than thriving' and the festivals that featured in previous Festivals Mean Business studies but are no longer present – including City of London Festival, Swansea International Festival and Dartington International Summer School, amongst others – are reminders of the precarity and complexity inherent in the festivals landscape. The sector has much to celebrate, though, including the inception and growth of many new events of all sizes and artforms, and this study includes data from a number of festivals who have been launched since the last report.

Much else has changed since Festivals Mean Business 3, notably the potentially devastating impact of the COVID-19 pandemic on our sector, and the ongoing cost of living crisis that continues to threaten the financial viability of festivals, both in battling rising costs and retaining much-needed audience support. This report also reflects the sector's capacity and resourcing in meeting the challenges of the climate crisis and the need to be more equitable, diverse and inclusive. Some things haven't changed since the last report; a simply staggering volume and diversity of work continues to be produced by the very lean organisations that deliver festivals. The figures in this report are impressive but relate only to the 101 survey respondents, so the full impact of the estimated 1,000 arts festivals across the UK would be very significant indeed. The sector's role in providing rich opportunities for personal development, both to its enormous volunteer workforce and for the paid creatives – often freelance - who staff festivals, is a continuing theme, and what the figures in the report can't show is the free work beyond paid hours that reflect the very personal commitment that festival teams have to their events.

Festivals are hyperlocal powerhouses of creativity and experimentation that are the nurseries for both artist and audience development. By encouraging risk-taking and innovation, they allow artists to push boundaries, test new ideas and engage audiences in unexpected ways, fostering innovation within the community. They showcase important social, cultural and environmental issues, providing spaces for dialogue and debate, as well as acting as a loudspeaker for voices that otherwise may be unheard. Despite this crucial role, festivals are often an almost invisible fabric in the UK's cultural ecology and are typically subject to the uncertainty of yearly project funding, which limits their sustainability, impact and ambition.

Thriving festivals are a gift to their communities, providing year-round creative opportunities as well as acting as catalysts for imagining different futures into being. BOP's report underlines the symbiotic relationship between festivals and place, and has painted a picture of a resilient sector often working under the radar in towns and cities across the length and breadth of the UK. Festivals deliver a huge amount for their communities, for artists and for the wider cultural sector in return for a relatively small investment. We believe that the time is right for a new vision for arts festivals, reflected in a festivals funding policy across the national arts councils, that addresses the inherent challenges in the annual funding model and gives the sector the confidence and ambition to plan. The sector is now at a crossroads; in supporting arts festivals, we will unleash significant untapped potential for artistic, community and financial impact and re-ignite the imagination of the next generation of festival audiences, artists and producers, to the benefit of us all.

Festivals Mean Business survey respondents in numbers

BAFA

BOP Consulting

1,111 days of activity programmed

11,500 events

500 year-round employees

500

1,000 employees added to the workforce during festivals

500 500

5,560,185 attendances for ticketed and unticketed in-person events[2]

6,350 volunteers support festival activity

500 500 500 500 500
500 500 500 500 500
500 500 350

£225k average income

£245k average expenditure

34,000 artists and ensembles[1]

2,700 new commissions

86% of festival organisations run education and outreach activities, and nearly all of these (83%) offer year-round programming

86% run education and outreach activities

83% offer year-round programming

40% of festival audiences travel less than five miles

£4.5m spent on UK based performers, artists, and speakers

108,287 attendances for free and ticketed online events[3]

Footnotes

These figures are based on the responses of up to 101 festival respondents. Numbers of respondents varied for each question and in some cases these figures have been rounded.

1. For the purposes of the survey "artist" was specifically defined as the number of performing acts, not the individual performers making up those acts. E.g. an orchestra would count as one artist, whilst a collaboration between an orchestra and a band would counts as two artists and two soloists with an orchestra would count as three artists.
2. Across 78 responding festivals
3. Across 28 responding festivals

Executive Summary

Arts festivals are a key component of the UK cultural sector, with over 1,000 festivals taking place in villages, towns, and cities across the full breadth of the country[1]. By their nature they are multifaceted and provide audiences with opportunities to engage with new and established artistic offerings across a broad range of different art forms. They encompass some of the UK's biggest cultural exports and, simultaneously, some of the UK's most hyperlocal offerings; 40% of festival audiences travelled less than five miles to attend a festival in 2023, whilst 85% of festivals that offer education and outreach programmes specifically target these to their local communities.

There were in total 5,560,185 attendances registered for ticketed and unticketed in-person events across 78 responding festivals in 2023[2]. This is equivalent to the population of Scotland. Interestingly, the very largest festival registered more attendances than the other 77 festivals combined, demonstrating the breadth of scale of the arts festivals sector in the UK. Additionally there were 108,287 attendances for free and ticketed online events across the 28 responding festivals that provided this programming information and a four-fold increase in the proportion of festivals offering online events between 2019 and 2023.

Our research has confirmed that this is a vibrant sector that should be seen as integral to the wider cultural sector of the UK. But it has also found that this is a sector that is surviving, not thriving. Having made it through the Covid-19 pandemic and the uncertainty created in that period, arts festivals now face a longer-term threat to their stability.

Permanent festival staffing is generally small; on average, responding organisations had three full time equivalent (FTE) employees year-round and four organisations had none at all. Yet with these small teams, festivals achieve a great deal, anecdotally often relying on goodwill and unquantified additional support. Across 99 responding festivals, in 2023 there was a total of 1,111 days of activity programmed, equivalent to over three years' worth of activity. Within this, respondent festivals programmed over 11,500 events – the equivalent of more than 30 events a day throughout the year – and engaged nearly 34,000 artists/ensembles[3]. Festivals also play a key role in investing in new works, commissions, and premieres; nearly two thirds of responding festivals (62%) included these in their 2023 programme, amounting to 2,700 new works presented during the year.

This is all happening within the context of expenditure outstripping income, challenging cash flows and festival finances that show a picture of organisations that are 'hanging on'. Income and expenditure patterns across festivals show that,

[1] Based on extrapolations from a combination of survey data and data provided by arms-length bodies
[2] In total the survey received responses from 92 festival organisations representing 101 individual festivals, however not all respondents provided answers for every question.
[3] For the purposes of the survey 'artists' were defined as performing acts, not individual performers e.g. an orchestra counted as one artist, whilst a collaboration between an orchestra and a band counts as two artists and two soloists with an orchestra would count as three artists.

generally, in 2023 festivals spent more than they made, with the average income sitting at around £225k whilst average expenditure was around £245k. Compared with 2019, festivals were most likely to say that their 2023 income had stayed the same or reduced (68%) whilst their 2023 expenditure had grown or plateaued (64%). Worryingly, for 28% of festivals, expenditure had grown by more than 20% whilst nearly a quarter of festivals (24%) had seen income reduce by more than 20%.

Reserves can help to plug some of these gaps, but they are not a long term sustainable solution. In 2023, 30% of responding festivals saw their reserves decrease by more than 10%, with more than half of these reporting a decrease of more than 20%. Likewise, public investment can and does help festivals to deliver their activity, and where this is provided it accounts for on average 27% of a festival's income. However not all festivals are in receipt of public investment for a wide range of reasons. Recognising the strategic role that festivals play in the UK arts ecology and in building stronger communities year-round will be the first step in creating a festivals policy that enables festivals to thrive.

More broadly, festivals also need support to address wider challenges, including environmental responsibility and equality, diversity, and inclusion (EDI), as whilst many festivals have gone some way towards integrating measures into their organisation, there are also challenges for further implementation. Financial support is only one pillar in this area, with responding festivals also keen to receive training as well as exploring opportunities for mentoring and peer development and support to establish best practice.

Now is a crucial time for action for the sector, and without additional support and investment – both fiscally and developmentally – the sector is at risk of both the reduction and loss of many iconic festivals, similar to the significant volume of green field festivals that have been lost during the last year[4].

The benefits of investment are multi-faceted. As well as helping to better position individual festivals to respond to current and future challenges, a properly supported festivals sector would create a wider ripple effect both into the places and the local communities that festivals serve and the artistic infrastructure that festivals underpin through commissions, artist development, touring and creative collaborations. Rather than simply surviving, as they are currently, a thriving festivals sector will be better able to attract more visitors to their places, helping to strengthen local economies and increase the resilience of the places where they are situated. Thriving festivals are furnaces of creativity that can help to support and develop the next generation of performers, both through their localised education and outreach programmes and their continued championing of and commissioning of new work. Additionally, thriving festivals can act as advocates for their sector, supporting other festivals through best practice

[4] Association of Independent Festivals

learning and increased visibility for the continued importance of the sector in the wider UK cultural sector and beyond.

In commissioning this research, the British Arts Festivals Association wanted to understand the state of the arts festivals sector today and how the sector can be best supported to thrive into the future. It is clear from the findings that the sector is at a tipping point and there is a need to act now. It is also clear that there is huge potential benefit from a thriving festivals sector and that tailored, stable support would unlock this potential, to the benefit of local communities and the UK's cultural economy.

Introduction

Background

The British Arts Festivals Association (BAFA), founded in 1969, is the leading network and development agency for UK arts festivals and its membership includes a broad variety of organisations across the UK of all types and sizes.

At key points over the last 20 years, BAFA has run a recurring research programme called Festivals Mean Business, a UK-wide research programme into the size, scale and impact of the arts festivals sector.

The last few years have been a tempestuous time for the cultural sector, with Brexit and challenging immigration policies causing uncertainty around the extent to which collaboration with European and International artists will remain possible, the Covid-19 pandemic causing the entire sector to shut down overnight, and a combination of rising supply chain costs and the ramifications of the ongoing cost of living crisis creating real-time staging implications for festivals. Within the wider festivals sector, work by the Association of Independent Festivals has highlighted the issues specifically facing outdoor music festivals, with 60 UK festivals cancelled in 2024 and 192 UK festivals permanently lost since 2019[5].

This wider context makes now the right time to carry out *Festivals Forward*, the fourth iteration of Festivals Mean Business, and this report presents the findings of a sector survey carried out under the Festivals Mean Business banner in the spring of 2024. It seeks to understand the contribution that arts festivals make to the wider cultural sector – and beyond – by answering three fundamental questions:

1) What is the scale of the arts festivals sector in the UK today?
2) How has the sector changed and evolved in recent years, especially in response to the challenge of Covid-19?
3) What is the capacity and potential of the sector, and how is it responding to wider contextual challenges?

Methodology

Using the previous Festivals Mean Business's methodology as a basis, a new survey was developed in consultation with BAFA and key partner organisations, including Julie's Bicycle, Tonic, Association of Festival Organisers, Association of Independent Festivals, and Outdoor Arts.

The survey was live for responses between March and June 2024, with potential respondents contacted through the BAFA newsletter, an open call on social

[5] Association of Independent Festivals

media, circulation through partner organisations' own media platforms and targeted requests for engagement.

Once received, responses were cleaned to ensure the dataset had relevance and robustness. Responses from non-arts festival organisations (e.g. trade bodies) were removed, whilst duplicate responses were consolidated, with any conflicting information confirmed with the responding organisation.

In total, after cleaning, responses were received from 92 festival organisations, representing a total of 101 arts festivals across the UK, although not all festivals responded to all questions, so, where appropriate, individual responding festival numbers are given across this report. A full list of participating festivals is included at Appendix 1 whilst the full set of survey questions is included at Appendix 2. Full data tables of responses can be found at Appendix 3.

Throughout the report, we have predominantly used the median calculation of average when exploring the results from respondents. In comparison to the mean average – which creates an average by adding together all responses and dividing by the number of responses – the median average looks at the answer given in the middle of a range. In this way it aims to be more representative of the total and account for extreme outliers. For example, if on a scale of 1 – 10, five responses were given as 2, 3, 3, 4 and 9, the median would be 3 compared with a mean of 4.2. Where averages are presented that are not median averages, we explicitly state this.

In addition to the survey, requests were made to Arts Council England, the Arts Council of Wales / Cyngor Celfyddydau Cymru, and Creative Scotland for details of arts festivals receiving both regular funding and grant funding. This, in combination with the data provided by survey respondents, was used as a proxy measure for estimating the overall size of the sector in Great Britain today[6], and is explored in more detail below.

Limitations

The key limitations to the approach that has been taken with this survey are as follows:

1. Although every effort was made to reach the broadest breadth of the sector, the survey has been completed by a sample rather than the full population of arts festivals in the UK today, and so cannot speak to the experience of every festival operating.
2. The survey allowed for self-definition as an arts festival. Whilst cleaning has been done to ensure relevance to the survey, using the guidelines for

[6] Insufficient responses were received from organisations in Northern Ireland to allow for comparison scaling at a UK level. Instead, comparison scaling throughout the report only looks at the three nations of Great Britain i.e. England, Scotland, and Wales.

qualifying for BAFA membership as a basis[7], this process of self-definition may have meant some arts festivals self-selected not to participate.

3. In some cases the raw data suggests that festivals have provided rounded rather than actual figures in response to request for data, particularly in relation to audience figures.

4. Not all questions were answered by all respondents, leading to varying sample sizes for different questions.

[7] For BAFA membership, an arts festival is defined as 'short-term scheduled events where the programme includes performances and/or exhibitions featuring single or multiple art forms'.

The scale of the arts festivals sector

Key findings

There are over 1,000 arts festivals operating in the UK today, based on both survey data and data from public funders.

Festivals are most likely to take place in urban areas (61%) and operate across multiple locations (75%). The majority operate annually (86%) and most frequently run for between 1 and 5 days (36%).

Three quarters of respondents identified that their organisation operates as a charity.

Nearly 34,000 artists/ensembles were engaged across responding festivals in 2023, performing across 11,500 events. Classical music was the most commonly programmed artform across responding festivals (54%), whilst poetry (including spoken word) and folk music were also frequently programmed (48% and 45% respectively).

Across responding festivals almost two thirds (62%) presented new works, with 2,700 new works, commissions, or premieres programmed in 2023.

Where, when, and what?

By their nature, arts festivals are hard to define. They usually – but not always – encompass multiple artforms, they usually – but not always – operate across a range of different spaces in their localities, and they usually – but not always – run for less than a fortnight. This breadth of delivery mechanisms created a challenge for this research, namely how best can we define the sector when a "one size fits all" approach could fail to capture the heterogeneity of arts festivals. To that end, we take an overarching view through this research, looking at both the most common results –as evidenced by the definition of the "average festival" in Appendix 1 – and the breadth of results.

How many festivals?

There are over 1,000 arts festivals that take place in the UK today, based on both the results of the survey and data provided by Arts Council England, the Arts Council of Wales / Cyngor Celfyddydau Cymru, and Creative Scotland. By comparing the number of organisations receiving grants in three of the four UK nations with the proportion of survey respondents receiving grants from these bodies, we have been able to extrapolate up a total figure for arts festivals in Great Britain (Table 1). This shows that in 2023 there were an estimated 1,046 festivals. As this analysis excluded arts festivals in Northern Ireland (due to the comparatively lower levels of survey responses), we can be certain that the figure for the UK as a whole will be higher.

Table 1: Extrapolated number of arts festival organisations in Great Britain

	Number of arts festival organisations in nation receiving funding from arms-length bodies	% of survey respondents in nation receiving funding from arms-length bodies	Extrapolated total number of arts festival organisations
England	356	41%	859
Scotland	108	67%	162
Wales	20	80%	25
Total			1046

Source: BOP Consulting 2024

Note: % presented to nearest whole number. The full number has been used for the extrapolation

Festival location

When looking at the types of location that festivals take place in, there was a higher occurrence of festivals taking place in urban (61%) rather than rural (39%) locations. They were also more likely to take place across multiple venues, such as theatres, community pop-up spaces, pubs and churches[8], with three quarters of respondents using multiple venues. In contrast, only 6% of festivals took place in a single venue and the remaining 21% took place outside (for example in a field or public space). This is perhaps unsurprising when we consider that only a fifth of respondents identified that they have responsibility for a venue.

The low proportion of festivals taking place outside in rural areas (8% of all respondents) links with the low proportion of festivals that provide overnight camping for festival attenders (12%), creating a distinct difference between the arts festival sector represented here and the – predominantly music led, commercially run – camping summer festivals that take place across the UK.

There was a high concentration of responses from South East England (21%) compared with the rest of the UK (Figure 1). To understand whether this is representative of the arts festivals sector more widely, we compared this with both the distribution of public funding across England, Wales, and Scotland in 2023 and the extrapolated distribution of arts festival organisations calculated above. This showed that whilst the number of responses from the South East and North were broadly in line with wider data sets, there was an overrepresentation of Welsh organisations and an underrepresentation of organisations from London and the Midlands (Table 2).

[8] The survey did not ask for respondents to specify the specific types of venues and spaces a festival uses; these venues were provided as examples in the question.

Figure 1: Map showing location of survey respondents by UK geographic area

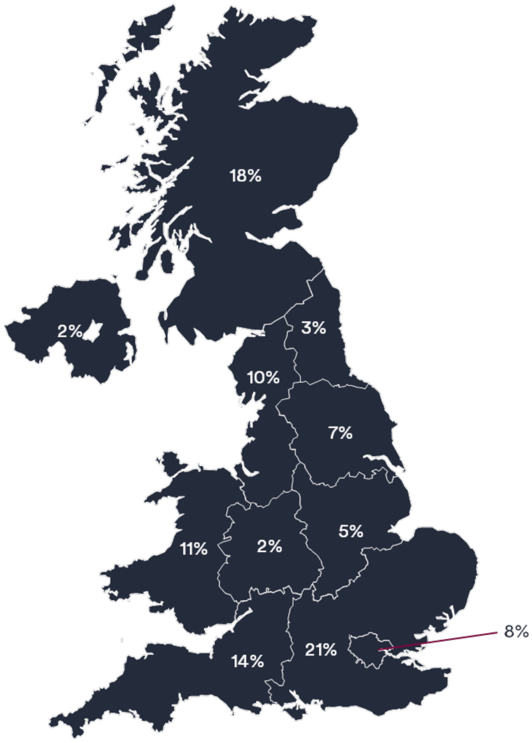


Table 2: Distribution of arms-length bodies public funding across Wales, Scotland, and England regions in comparison to the distribution of survey respondents

	% of arts festival organisations receiving public funding from arms-length bodies in 2023	% of all arts festivals in region when multiplier added	% of survey respondents
Wales	4%	2%	11%
Scotland	22%	15%	18%
London	14%	16%	8%
Midlands	12%	14%	7%
North	20%	22%	20%
South East	17%	19%	21%
South West	10%	12%	14%

Source: BOP Consulting 2024

Note: due to the small number of responses from Northern Ireland, we did not consider it a robust approach to apply a comparison.

Note: multiplier derived from the proportion of survey respondents in each region in receipt of arms-length public funding, and has been applied to the actual proportion of festivals receiving funding to extrapolate overall geographic distribution of arts festivals within England, Scotland and Wales

Length and frequency of festivals

The most common length of festivals was between 1 and 5 days (36%), with a further third of festivals running for between 6 and 10 days (32%). The average across all festivals was 9 days, in part because of the comparative extreme length of some festivals, with three festivals running for more than eight weeks. Whilst the majority of responding festivals programmed events on each day of their festival's total run (80%), there were some festivals who had "off days" where they did not programme any events.

Nearly all of the responding festivals are annual festivals (86%), with 6% taking place biennially. Of the remaining 8%, frequencies ranged from three times a year to festivals with no fixed frequency.

Organisational structure

Three quarters of respondents identified that their organisation is a charity. Of these charities, roughly half were charitable trusts, and a third were charitable incorporated organisations. The most common legal structure for festival organisations is a limited company, either limited by guarantee or limited by shares (55%).

Festival programming

Types of artform

Most festivals (84%) programme multiple different artforms across their events, although 16% programme only one artform; this is unsurprising given the survey was carried out with arts festivals which are generally characterised as being multi-artform festivals. The most common artform types programmed by responding festivals are classical music (54%), poetry, including spoken word (48%) and folk music (45%). The full breakdown of artform types across the festivals is shown at Table 3 below. Other artforms listed by respondents included blues music, choral music, circus, community arts, magic, and puppetry.

Table 3: Results of the question "which artforms were included in your 2023 festival? Please tick all that apply"

Source: BOP Consulting

Artform	% of respondents
Classical music (Western classical music)	54%
Classical music (Music outside the Western canon)	27%
Comedy	27%
Dance	42%
Film	35%
Folk	45%
Jazz	43%
Literature	36%
Opera	16%

Artform	% of respondents
Poetry, including spoken word	48%
Popular / Contemporary Music	34%
Science	12%
Theatre	32%
Traditional music of global majorities	30%
Visual Arts	39%
Other (please specify)	22%

Source: BOP Consulting 2024

Artists engagement

To understand the scale of programming, festivals were asked how many artists they programme, with "artist" specifically defined as the number of performing acts, not the individual performers making up those acts. For example, an orchestra would count as one artist, whilst a collaboration between an orchestra and a band would counts as two artists and two soloists with an orchestra would count as three artists.

In total, responding festivals engaged nearly 34,000 artists in 2023. Most commonly, festivals programmed between 21 and 40 artists (27% of festivals) however a quarter of responding festivals featured over 100 artists, leading to an average of 46 artists performing per festival. For two thirds of festivals, nearly all artists were professional (81-100%).

Number of events

As explored in more detail below, responding festivals offered a range of different ticketing options, making it difficult to have a single common definition of a festival event. Festivals that offered either single-entry tickets, both single-entry tickets and individual event tickets, or required no tickets (free entry) were asked to provide an event number based on the number of acts within their festival across all stages: this produced an average of 75 events. Meanwhile, festivals that only offered individual event tickets were asked to base this on the number of events for which tickets could be booked and had an average of 135 events. When combined, this creates a total of 11,500 programmed events across responding festivals in 2023, or an average of 118 per festival.

New commissions

New work is an important feature of many festivals, with two thirds of festivals hosting at least one new work, commission, or premiere in 2023. Across all festivals that hosted new works, a total of 2,700 new works were presented. Individual festivals generally presented between 1 and 60 new works per festival, with an average of six new works per festival. There were two outliers, one with several hundred new works and one where the number of new works was over a thousand, however this is in part to do with the specific nature of these festivals.

Public engagement with festivals

Key findings

In 2023 there were 5,560,185 attendances registered for ticketed and unticketed in-person events across 78 responding festivals; this is equivalent to the population of Scotland. Meanwhile there were 108,287 attendances at ticketed and unticketed online events and a four-fold increase in the proportion of festivals offering online events between 2019 and 2023.

71% of festivals in 2023 provided accessible or free companion tickets compared with 63% in 2019.

Responding festivals tend to be hyperlocal and cater to mostly local audiences. 40% of festival audiences travelled less than five miles to attend a festival in 2023, whilst 85% of festivals that offer education and outreach programmes specifically target these to their local communities. They are also significantly likely to run their outreach programmes year-round (83% of festivals running activities), strengthening their offer to their local area.

Festival attendance

Different festivals take different approaches to the way that they ticket their festivals, with some issuing one single ticket that covers the whole range of events available (12% of respondents), others providing event-by-event ticketing (69%), some offering entirely unticketed events (12%) and some offering a combination of ticket options (7%). This creates different ways of considering attendances, and so to try and understand the number of attendances at festivals across the UK, respondents were asked to provide a best estimate of the number of tickets they had issued for events and/or the number of people who had attended events as relevant.

In-person events

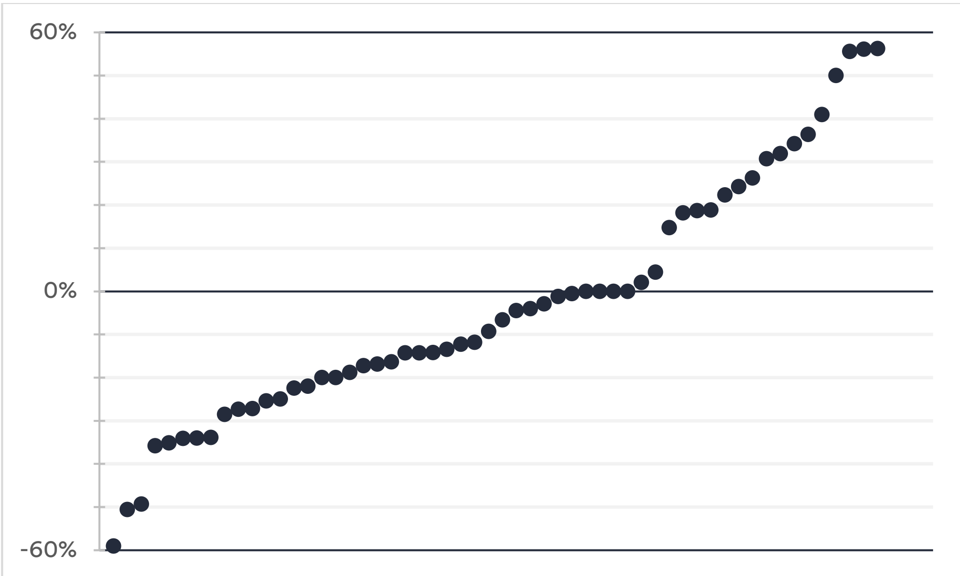
In total, in 2023 across our respondents 5,560,185 attendances were registered for ticketed and unticketed in-person events. This is a decrease in comparison to 2019, when there were 6,160,774 attendances registered for ticketed and unticketed in-person events, equivalent to a 10% decrease in physical attendances (Figure 2). Excluding one outlier in the dataset, there is an overall decrease of 2% between 2019 and 2023.

Figure 2: Number of registered attendances for ticketed and unticketed in-person events

Ticket sales

Among festivals that sold tickets, ticket sales for in-person events remained largely consistent between 2019 and 2023, with average ticket sales hovering at around 3,600 tickets. When looking specifically at those festivals that provided attendance data for both 2019 and 2023, there was a 15% drop in tickets. Excluding one outlier in the data, there was an 8% drop in the number of sold tickets between 2019 and 2023. Given the slim margins for most festival organisations and the relative importance of ticket income (as explored below), this 8% drop can have larger ramifications, particularly for smaller organisations. However, the proportion of festivals providing free tickets for in-person events rose between 2019 and 2023, from 74% to 79%.[9]

Figure 3: Percentage change in number of in-person tickets sold by responding festivals between 2019 and 2023



Note: festivals with a decrease of more than 60% (3 respondents) or an increase greater than 60% (8 respondents) removed from

[9] It is important to note that there were four responding festivals that launched after 2019, whilst other festivals moved from an entirely free model in 2019 to a mixed model in 2023. Both of these factors may have had a bearing on the overall totals recorded for attendances.

the graph for visualisation purposes. Each dot represents the increase or decrease in the number of tickets issued in 2023 as a % of tickets issued in 2019 of an individual respondent. Full data tables provided at Appendix 4.

Online events

Compared to 2019, in 2023 there was an increase in the proportion of festivals offering online-only events. In 2019, only 6% of festivals sold tickets to online-only events and 6% offered tickets to free online-only events. This nearly quadrupled to 24% for paid events and 15% for free events by 2023; in all cases festivals were offering online events in addition to their in-person programme rather than instead of this programme.

Across 27 responding festivals providing online programming, there was a 570% increase in the number of attendances at ticketed and free online events between 2019 and 2023, rising from 11,263 to 75,787, with all responding festivals either having almost the same or higher numbers of online attendances than 2019. This figure excludes the only responding festival that recorded a large decrease between 2019 and 2023, as this was a significant decrease (c.40k attendances) and skewed the overall trend to suggest that there was a decrease in online attendances when looked at collectively. Including this festival, there were a total of 108,287 online attendances in 2023.

This increase in appetite for online events is likely to be a ripple effect following on from the necessity for many festivals to transition to delivering online activities during the Covid-19 pandemic (although the specific number that did this was not captured through the survey) and associated increased availability of free-to-use or cheap-to-use technologies that allow festivals to stage hybrid and/or online events (for example Zoom webinars). Anecdotally many festivals found that online events provided a valuable additional source of revenue during the pandemic and so have continued to offer these alongside the return to live events that has since been possible. Additionally, online events provide an added benefit of enabling festivals to provide greater accessibility to their programming, especially for audiences who may otherwise be unable to travel to specific festivals and to reach international markets.

Accessible or companion tickets

Positively, there was an increased improvement in accessibility at festivals in 2023, as 71% of festivals in 2023 provided accessible or free companion tickets, as opposed to 63% in 2019. This equated to over 73k tickets.

Audience location

Arts festivals in the UK appear to be hyperlocal and cater mostly to local audiences. Almost 40% of festival audiences travelled up to five miles to attend a festival in 2023. International audiences were limited, with only 3% of attendees visiting from overseas, and 30% of festivals stating that they have no overseas visitors at all. Almost every festival attracted audiences from outside of their local areas, with only 6% of festivals reporting no visitors from elsewhere in the UK. On average, nearly 14% of festival attendees arrive from elsewhere in the UK.

Audience age

Respondents were asked to provide a percentage split between adult and child attendees in their audience. 53 festivals were able to provide this information, which showed that a clear majority of festival attendees are adults, averaging 86% of attendees across these festivals. Children are attendees at almost all festivals, with only 8% of responding festivals stating that they have no child attendees. However, given the range of ticketing options in evidence, the fact that not all events offer specific 'child' tickets, and the likelihood that any demographic data that may have been collected at point-of-sale will only relate to the lead booker, some caution should be applied to these results.

Education and outreach

The vast majority of festivals engage in education, community or outreach activities, either during the festivals themselves or throughout the year. Specifically, 86% of festival organisations engage in these initiatives. Among these, 66% offer workshops and masterclasses, while 54% run ongoing educational programmes. Importantly, nearly all of these festivals (83%) run their programme year-round, demonstrating the value that festivals can bring to their local communities even when not directly staging their primary event. When considered alongside the hyperlocality of audiences seen above, there is a strong argument to suggest that the majority of festivals are rooted in place and bring tangible benefits to their local communities not just during their festivals but as part of the wider local cultural infrastructure year-round.

Beneficiaries of education and outreach programmes

Relatedly, local communities (targeted by 85% of festivals) and schools (targeted by 78% of festivals) are often the primary beneficiaries of these education and outreach activities. Education and outreach activities target sector professionals less often, with just over half (56%) of festivals offering these programmes to them. This lower engagement level may be attributed to the diverse locations festivals are set in, and the ability for sector professionals to access them during non-festival periods.

Capacity for education and outreach programmes

Despite the widespread adoption of these programmes, overall, they up make a small proportion of the total activity delivered by responding festivals, accounting on average for less than a fifth of overall activity. Festivals are also slightly more likely than not to have a dedicated member of staff for their education and outreach programmes. 59% of respondents stated that they had this role compared with 41% who did not; this may in part be down to a lack of funding to provide these roles.

The business of running a festival

Key findings

Permanent festival staffing is generally small; on average, across 64 responding organisations there were 3 full time equivalent (FTE) employees year-round with many (46%) having no permanent full time staff. Instead, these organisations rely on permanent part time and/or festival only staff, whilst four respondents had no employees at all, relying solely on volunteers. Freelancers are also a core part of festival employment, with 4 in 5 surveyed festival having some levels of freelance full time equivalent (FTE) staff. As could be expected, for the majority of festivals staffing increases during festival periods, with around 1,000 FTEs added to the workforce of 54 responding festivals during festival time.

Balancing this is a dependency on the volunteer workforce. Across the 67 respondents providing information about volunteering, 6,350 volunteers are engaged both year-round and during festival periods, with festivals engaging on average 10 volunteers year-round and 37 festival only volunteers. However, the balance of volunteers to staff remains broadly the same year-round, at around two volunteers for every staff member across festivals where this could be tracked.

Interrogating festival finances shows a picture of organisations that are 'hanging on'. In 2023 festivals spent slightly more than they made, with the average income sitting at around £225k whilst average expenditure was around £245k. Meanwhile 30% of responding festivals saw their reserves decrease in 2023 and, in comparison with 2019, saw income fall (48% responding festivals) as expenditure rose (60% responding festivals).

Income categories fall into three overarching areas, with ticket sales and earned income making up half of all income. Public funding accounts for a fifth of income whilst the final third comes from a range of other fundraising sources, including direct fundraising and commercial sponsorship.

When exploring expenditure in more detail, on average festivals were most likely to spend the biggest proportion of their stated expenditure on performers, artists, and/or speakers from the UK (an average of 28%) and in total £4.5m was spent on UK based performers in 2023. This is reflective of the typically lean nature of festival organisations as a result of both their lower levels of staffing and their general lack of significant overheads (such as the costs associated with running a venue).

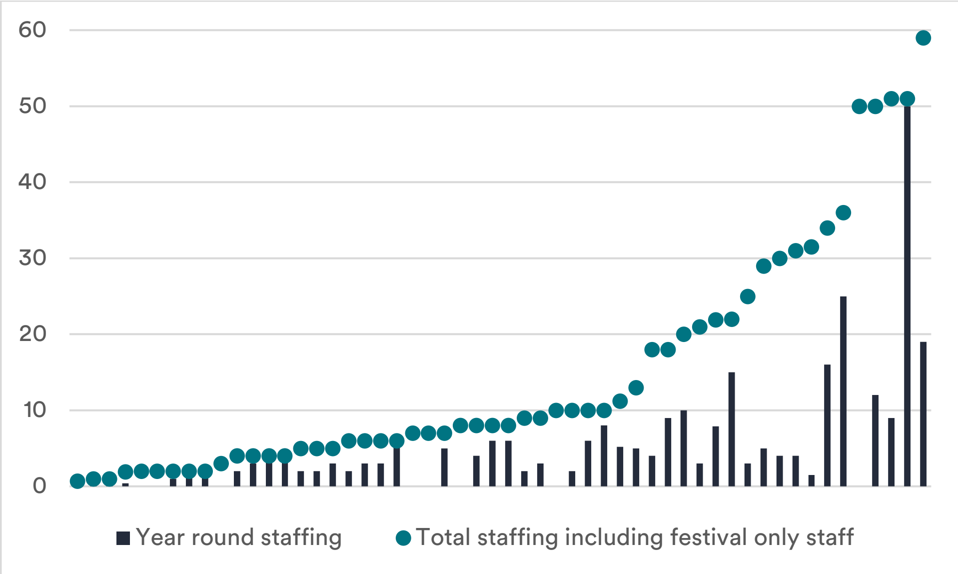
Festival employment

Paid staff

Festivals achieve a lot with not a lot of paid capacity; many of the festivals we surveyed have no permanent full time staff (46%) and two thirds have five or fewer permanent part-time staff members.

Across festivals with year-round employment, the average number of FTE employees was 3 year round, with on average an additional 7 FTE employees added during festivals. As seen in Figure 4, this sits within the context of some festivals having no year-round permanent employees and some having substantially higher numbers of employees both year-round and during festival periods. In total, there were around 500 FTE employees year-round (excluding one festival that recorded over 200 FTE year-round employees) and around 1,000 FTE employees added to the workforce during festivals.

Figure 4: Permanent and festival-only staff distribution



Note: Graphic excludes outliers where the total staffing number exceeded 60 (8 respondents) for visibility.

Freelancers are a core part of festival employment, with 4 in 5 surveyed festival having some levels of freelance full time equivalent (FTE) staff. This ranged from 1 FTE up to 100 FTE freelancers, with an average of 3 freelance FTE staff.

Volunteers

Volunteering is also a key component of festival employment, with festivals working with volunteers both year-round and specifically during the festival. In total 6,350 volunteers were engaged either year-round or for festivals only by responding festivals. The average number of volunteers for festivals year-round was 10, increasing to an average of 37 during the festivals themselves. When considered alongside the reported staffing levels, this demonstrates the dependency that festivals have on volunteering. This was particularly the case for the four responding festivals who were wholly dependent on volunteers to operate.

There are however significant differences in the scale of festival volunteers engaged by surveyed festivals. Excluding the top and bottom 25% (i.e. the very biggest and very smallest festivals), the number of volunteers year-round ranged from 7 to 15 volunteers compared with between 20 and 70 volunteers during festivals. This is not necessarily unsurprising, given the increased volume of activity that organisations are delivering during their festival period and is matched by the increases in FTE staff seen above.

It is important to note that through the survey we purposefully did not specifically define what was meant by volunteers, beyond specifying that this included a festival's board where applicable. This was done to allow respondents to populate this question based on their own organisational approach to and consideration of volunteering roles. As a result, for different festivals this figure could include board members and "back office" volunteers who support with things such as marketing as well as more traditional volunteering roles such as stewarding and more manual set-up and de-rig tasks. Given how many respondents were charitable organisations, and that charity trustees cannot be remunerated, this is likely to account for a significant number of year-round volunteers.

However, it is interesting to note that the balance between paid staff and volunteers remains largely the same both inside and outside of the festival period. Whilst there is an average workforce of 36% staff and 64% volunteers year-round (i.e. two volunteers to every paid member of staff, based on those festivals that have any form of year-round employment), this becomes an average workforce of 32% staff and 68% volunteers during the festival. This demonstrates that, where festivals are concerned, it is scale that is important, and that during festival periods there is a need for a much higher number of volunteers to support delivery. For example, whilst year-round it is only the top 5% of festivals that have volunteering numbers running into the hundreds, during festivals the top 25% all reported working with more than 100 volunteers.

It is clear that festivals are reliant on a dynamic workforce which shapes and builds knowledge within the sector across freelance creatives, permanent staff and volunteers, and that festivals' small core teams often centre around key individuals.[10]

Festival finances

Recognising that festivals will run their financial year from different starting points, surveyed festivals were asked to provide financial information based on the year that included their 2023 festival (or most recent festival for biennial festivals). To that end, two thirds of respondents were able to provide figures

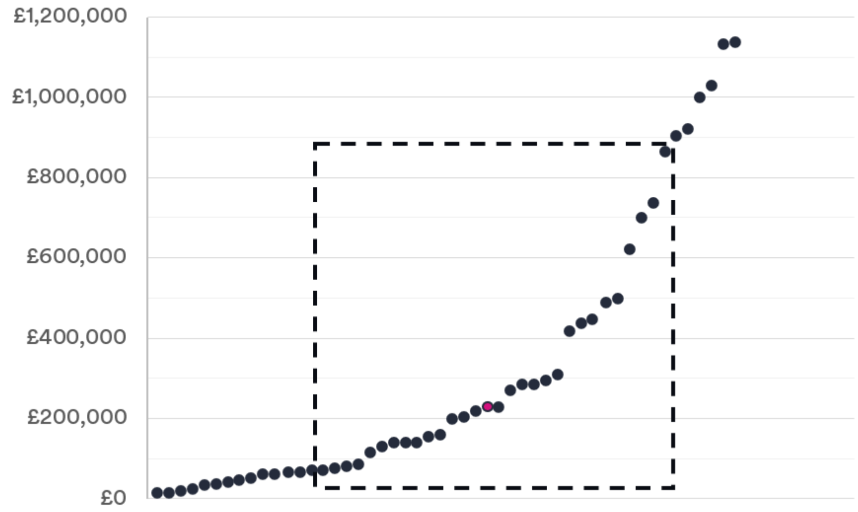
[10] BAFA is separately exploring the impacts of the last few turbulent years on the team dynamics, leadership and future development of festivals in a collaborative doctoral award in partnership with Birmingham City University, with support from Midlands4Cities. The outputs from PhD candidate Naomi Taylor's work will complement this report.

based on confirmed accounts, whilst the remaining third are based on best estimate accounts.

Total income and expenditure

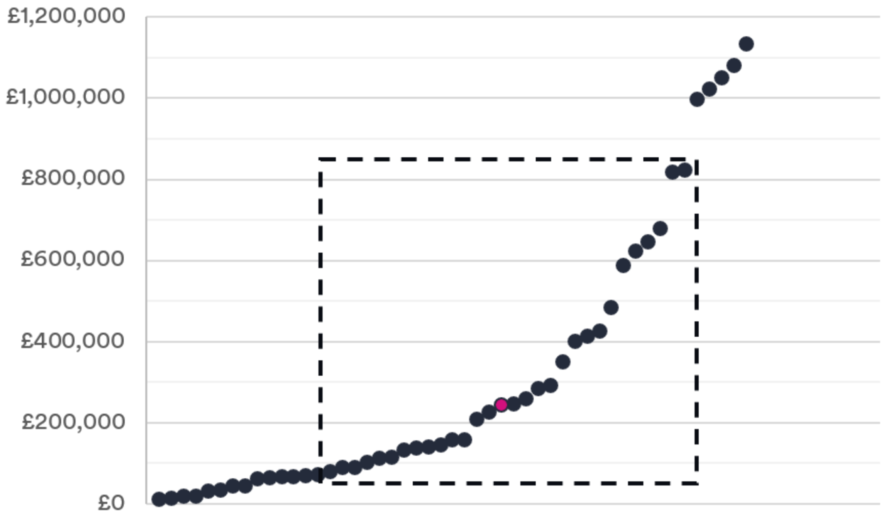
The majority of festivals (69%) reported incomes of less than £500,000 with a median income of £227k. In contrast, 66% of respondents reported expenditure of less than £500,000 and the median expenditure was higher than income at £245k (Figures 5 and 6). However, whilst these averages were relatively low, the overall span of respondent festivals' income and expenditure is much greater, with an income range of £11k to £29.4m and an expenditure range of £12k to £28.5m.

Figure 5: Income distribution in 2023



Note: Income figure excludes eight outliers between £1.5m and £29.4m. The pink dot represents the median income whilst the box delineates the interquartile range.

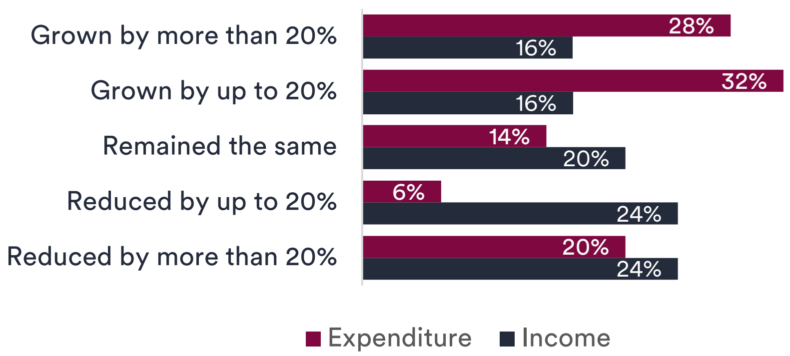
Figure 6: Expenditure distribution in 2023



Note: Expenditure figure excludes nine outliers between £1.3m and £28.5m. The pink dot represents the median income whilst the box delineates the interquartile range.

Expenditure has increased for festivals compared with 2019, with 60% reporting an increase in their expenditure, and 28% reporting an increase of more than 20% (Figure 7). Meanwhile, income has reduced for half of festivals, with 48% reporting an overall reduction and 24% reporting a reduction in income by more than 20% between 2019 and 2023. Given the Charity Commission sets a 'sudden loss' of 20% or more of a charity's income as an example of a significant financial loss which needs to be reported as a serious incident (although this is within a given year, rather than over a period of time as explored here), and 74% of the festivals that we surveyed identified themselves as charities, this suggests a sector at risk of collapse, particularly when read alongside the significant reduction in reserves experienced by some festivals (see below).

Figure 7: Change in income and expenditure between 2019 to 2023

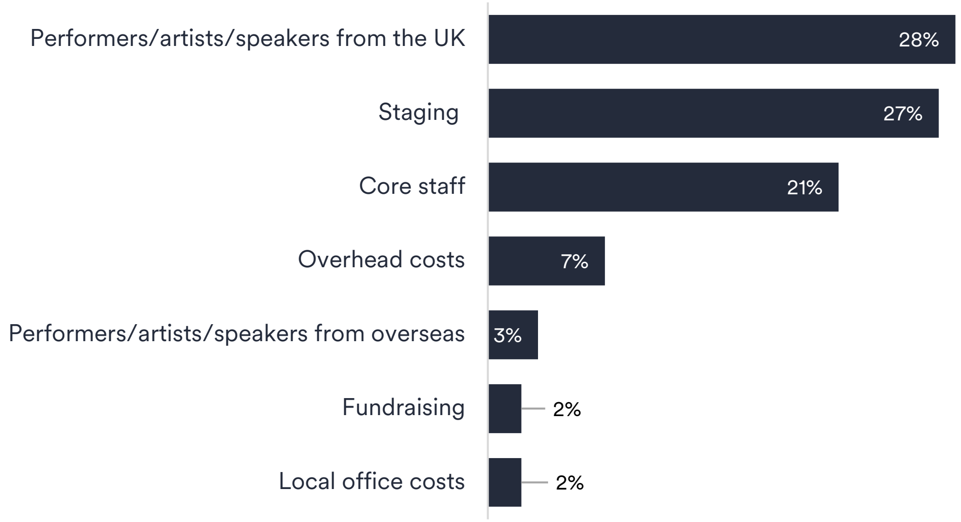


Categories of spend

As well as running their financial years from different points, each festival organises its finances differently, not least due to the breadth of organisational types seen across responding arts festivals. To try and mitigate this we asked respondents to tell us their expenditure across a range of categories including artistic expenditure (fees for performers, artists and speakers from the UK and abroad), staging costs (event production, stewarding, toilets, catering, event marketing and promotion, insurance / licensing / compliance), core staff, overheads, and fundraising.

When we break expenditure down into these categories of spend (Figure 8), we see that festivals allocate the largest portion of their financial spend on the content that makes up the festival, with an average of 31% of expenditure allocated to performers, artists, and speakers from the UK and overseas. The direct running of the festival follows closely behind, with staging making up 27% of spend. While the median cost of core staff appears to be significant, only a fifth of overall expenditure is allocated to core staffing costs, including both year-round and festival specific employment. This finding suggests that while core staffing is essential, unsurprisingly festival content is the main focus of festival spend. Festivals are typically lean organisations without significant overheads (e.g. the costs of running a venue) and this is reflected in these findings, which show a high proportion of investment going directly into artistic expenditure.

Figure 8: Total expenditure in 2023 broken down by category of spend



Notes:
(1) responses in this figure do not total 100% as the averages have been calculated as a proportion of the total expenditure stated by festivals. However in some cases the combination of individual totals across categories of spend did not match the stated total expenditure. This is likely to be due to festivals having other categories of spend beyond those included in the survey and/or not being able to align their own accounts with the categories of spend provided. For example, they may have not included venue hire as part of staging costs or have excluded some year-round event costs.
(2) 'Staging your festival' includes event production, stewarding, toilets, catering, event marketing and promotion, insurance / licensing / compliance

Income sources

Traditionally, there has been an assumption within the arts that income largely follows a "third-third-third" model, whereby income is fairly evenly split between box office income (where relevant), public funding, and fundraising and philanthropy. Amongst responding festivals, this is only borne out to some extent, in that these three categories are the largest categories of income (Figure 9 and Table 4). Festivals heavily rely on ticket sales as a primary source of income, with an average of a third of their income coming from box office sales. A further fifth of total income is raised through fundraising. In contrast, only 2% of festivals expenditure is specifically allocated to fundraising efforts[11]. This demonstrates festivals' cost-effective methods relating to fundraising.

Whilst on average festivals only receive 20% of their income from public funding (both local authority funding and public funding from arms-length bodies), this figure does not tell the full story as it looks at the results across all festivals, i.e. including those that do not receive public funding. When looking at the figures just for those festivals that do receive public funding (around four-fifths of all festivals), the actual average is 25% of a festival's income.

[11] This excludes any staffing costs related to fundraising, which would be allocated to "core staff salaries"

We investigated whether the size of organisation makes an impact on the balance between different funding sources, categorising organisations as having either small (less than £250k), medium (£250k-£750k) or large (more than £750k) incomes. No noticeable difference appeared when the analysis was run through these filters, however full data tables showing the breakdown are provided in the appendix.

Figure 9: Total income in 2023 broken down by simplified categories of income

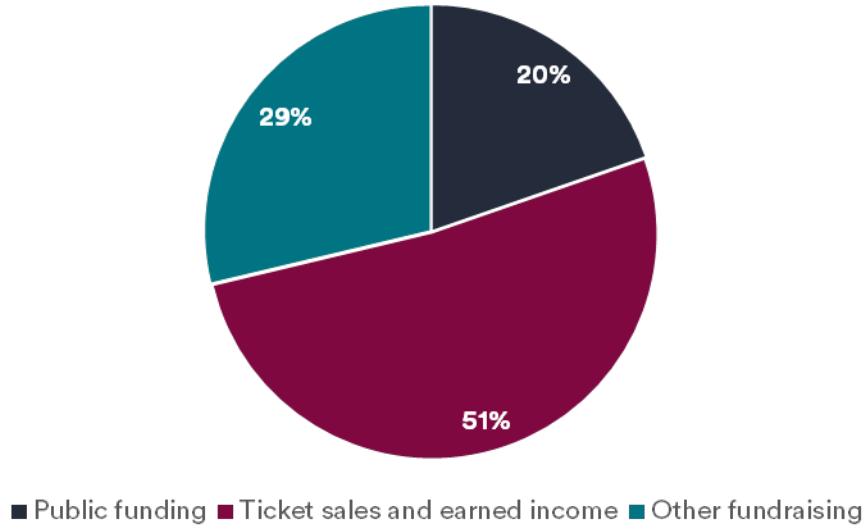


Table 4: Total income in 2023 broken down by detailed categories of income

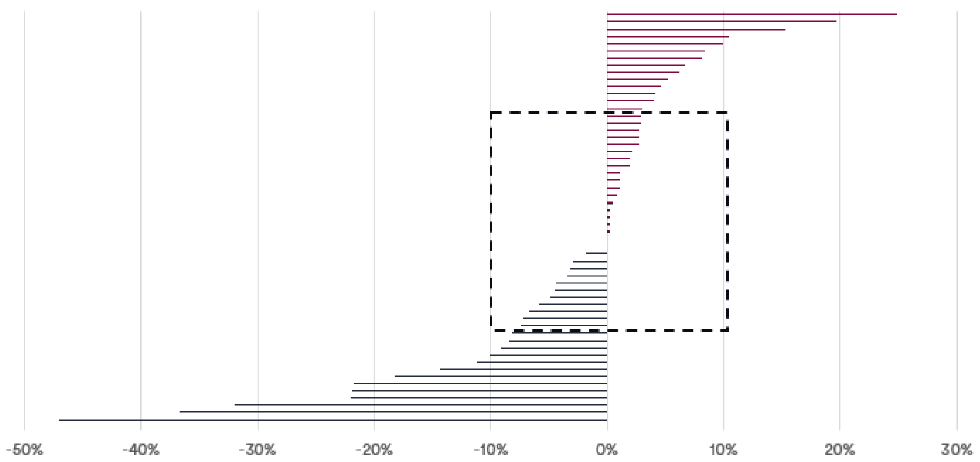
Simplified category	Detailed category	% of income
Public funding	Arms-length bodies	14%
	Local authority/ies	6%
Ticket sales and earned income	Box office / ticket sales	34%
	Other earned income	12%
	Food and beverage sales	3%
	Merchandising, retail, and services	2%
Other fundraising	Fundraising	19%
	Commercial sponsorship	7%
	Membership scheme	3%

We did not ask about the specific breakdown of income and expenditure in 2019, so it is not possible to compare how these individual categories of income and expenditure have changed in the last four years, nor is it possible to see if there is any one specific category that has contributed to the significant changes that festivals are reporting.

Revenues

Looking at the balance of income compared to expenditure, 55% of festivals had a net gain and 41% had a net loss; the final two festivals broke even (Figure 10). The mean net balance in 2023 was £11,140, whereas the median net balance was £345, signalling that whilst slightly more festivals made a profit than a loss (55%), the average is heavily weighed down by festivals with heavy losses, some of which ran into multiple hundreds of thousands[12]. For the middle 50% of festivals, the net balance ranged from -£18,980 to £6,031, representing a net profit percentage of -7% to 3% of overall revenue.

Figure 10: Net balance as a portion of overall revenue distribution in 2023



Note: Net balance figure excludes one outlier greater than 100%. The box delineates the interquartile range.

Reserve levels

Currently, festivals are surviving but not thriving, with a picture of rising costs and reduced income. Whilst festivals most commonly reported that in 2023 their reserves generally stayed the same (46% of respondents), which is likely to be helping bridge the income expenditure gap, there are trends towards decreases in reserves which, if borne out longer term alongside continued disparity between income and expenditure, could lead to increased financial difficulties for festivals, threatening their longer-term viability and ultimately leading to festival closures on the scale being seen in the outdoor music festival sector.

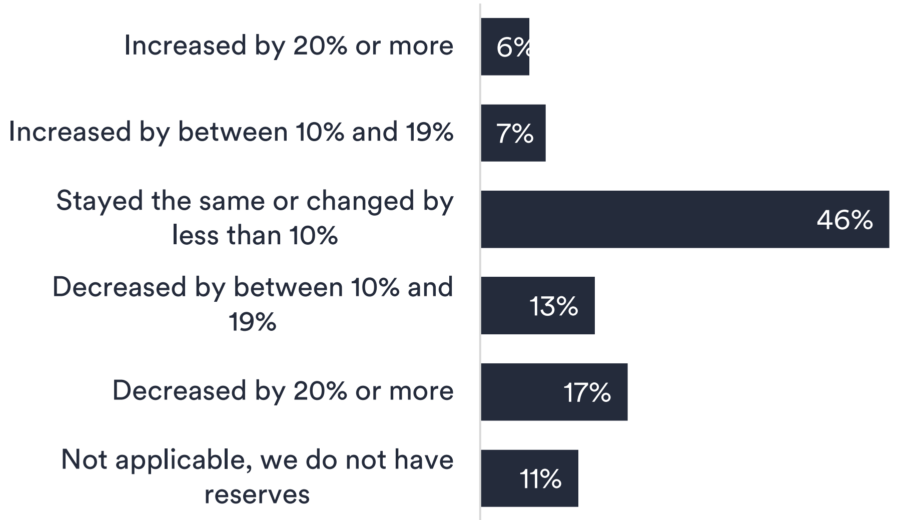
Although we did not specifically ask for a comparison between reserves in 2019 and 2023, anecdotally we are aware that the Covid-19 pandemic had a significant impact on reserves for many festivals, especially where there were still overheads that required paying whilst festivals were not active and/or irrecoverable payments made towards staging cancelled festivals in 2020 and/or 2021. As a result, it is possible that for some festivals 2023 was a year for building these

[12] As discussed in the introduction, the mean average creates an average by adding together all responses and dividing by the number of responses whilst the median average looks at the answer given in the middle of a range

reserves back up, and to that end it is noticeable that 13% of those surveyed saw their reserves increase by more than 10% in 2023 (Figure 11).

However, for 30% of festivals there has been a decrease to their reserves of more than 10%, and more than half of these respondents have seen their reserves decrease by 20% or more in 2023. There are a number of potential factors that could be contributing to this. For example, the continued rising cost of materials and services that has been seen since in the last few years may have meant that for some organisations, predicted costs were lower than actual costs, necessitating a draw on reserves to fill the gap. In other cases, festivals may not have realised as much box office revenue as initially anticipated or faced reduced access to funding, either from public or private grants, again requiring the use of reserves to "plug the gap".

Figure 11: Change in the value of reserves (including restricted, unrestricted, designated, and endowment funds) during the year including responding festivals' 2023 edition



Public funding of festivals

Alongside the survey, we have analysed data from three of the four national cultural funders in the UK to understand more about the interplay between regular funding of arts festivals (i.e. multi-year settlements usually granted for around three years) and project funding of arts festivals (one-off grants usually covering a short period of time).

The balance of regular funding to project funding that was made in 2023, both in terms of number of festival organisations receiving funding and the total value of funding at each of the funders is shown in Table 5 below. This shows that where arts festivals do receive funding it is much more likely to be from project funding than regular funding, meaning that they have a less stable form of public funding income and relatedly will be less able to plan across multiple years. Whilst this is not entirely borne out by survey respondents (of 19 respondents indicating that they had received funding from Arts Council England half were NPOs (9), whilst four of the nine organisations receiving funding from Creative Scotland were in receipt of regular funding) this is likely to be in part due to the specific targeting of larger festivals as part of the research programme.

Additionally, because they are more likely to receive project funding, they are also more likely to be receiving smaller amounts of funding. When looking at the data from each of the funders in more detail, that whilst the median value for regular funding at Arts Council England and Creative Scotland was £197,950 and £183,333 in 2023, the median value for project funding was £29,636 and £49,990 respectively, and the median for the Arts Council of Wales / Cyngor Celfyddydau Cymru was £41,000[13].

Table 5: Number of festival organisations in receipt of regular and project funding in 2023 and the value of that funding

	Regular funding		Project funding	
	Number of organisations	Value of funding (£)	Number of organisations	Value of funding (£)
Arts Council England	50	10,355,465	306	12,691,626
Arts Council of Wales / Cyngor Celfyddydau Cymru	1	97,500	19	8,795,036
Creative Scotland	8	3,838,166	102	1,039,767
Total	59	14,291,131	427	22,526,429

[13] It should be noted that for Arts Council England there are different levels of application requirement for grants above and below £30,000 which may have influenced the volume of awards made under this threshold (229 of 306 project grants)

Responding to wider challenges

Key findings

Nearly all respondents (80%) implement some form of measures to improve their festival's environmental sustainability, however a third of these find it challenging to do so, most frequently due to the financial implications of implementing such measures.

Whilst generally lacking formalised mechanisms for doing so, nearly all responding festivals (74%) strive for inclusion and accessibility across their activities, and actively collect data about staff and/or audiences in order to better understand how they can further embed this.

Environmental responsibility

Improving the environmental sustainability of festivals is seen as a crucial aspect of managing a festival. 80% of responding festivals report implementing sustainability measures to improve the festivals' environmental responsibility, and 70% utilise an environmental sustainability tracking tool.

Whilst festivals do show a strong interest in addressing their environmental responsibilities, only half (53%) have an official environmental policy. Among those that did attempt to improve their festival's sustainability, more respondents found it challenging (33%) than those who found it easy (16%).

Financial stability is the most frequently cited factor by respondents when exploring why they found improving environmental sustainability a challenge. With rising costs, festivals are struggling to balance improving sustainability with affordability, as more impactful measures such as eliminating the use of diesel fuelled generators can be more expensive for festivals to implement than common "easy wins" such as reducing printouts or single-use plastics. Festivals also quote their limited ability to affect more impactful measures such as attendee transport modes, citing issues such as limited affordable public transportation, international visitors with high carbon footprint, or limited renewable energy generator options in rural areas.

By far the most popular measure implemented to improve environmental sustainability was sourcing local produce and services (85%), followed by reducing production impacts (69%), access to drinking water and water efficiency measures (63%), and banning single-use plastics (60%).

While vegan/vegetarian catering was highlighted by festivals as a major method of reducing environmental impacts, less than half (46%) of festivals reporting adopting this measure. Additionally, 31% of festivals also reported eliminating the use of diesel-fuelled generators, though more rural festivals noted that this measure is more difficult to adopt. The full list of measures implemented by responding festivals is included in Appendix 4.

Festivals outlined avenues for support that could help improve environmental sustainability within festivals. These include:

- sharing knowledge between festivals and artforms;
- receiving training and guidelines; and
- assistance from local authorities, particularly in relation to improving transportation options.

Equality, diversity, and inclusion

While festivals have adopted some EDI-related measures, more advanced actions and procedures appear to be limited within the festival sector. Most festivals strive to maintain inclusive spaces and provide training for volunteers and temporary staff on accessibility and inclusivity measures (74%). However, only 24% of festivals have an active EDI team on staff and even fewer (15%) have an EDI Lead. The full list of EDI measures implemented by festivals can be found in Appendix 4.

Even though there is a lack of an official EDI team lead on responding festival's staff, many festivals (43%) report carrying out an EDI strategy and action plan.

Most responding festivals have a robust system for collecting and reporting on demographic data, with the extent of data collection varying by group. Specifically, 78% collect data on staff and board members, whilst 63% collect data on audiences and performers.

Recommendations for the future

As explored elsewhere, the arts festivals sector is at a tipping point, and there is a need to act now to prevent longer-term losses.

From a practical perspective, there are a range of potential opportunities and mechanisms that can help support the sector, largely broken into financial support and development support.

Financial support enables arts festivals to provide opportunities for new commissions and creative experimentation. As a sector that is often dependent on a lean and/or volunteer workforce, festivals are able to do more for their local communities, the creative workforce, and festival audiences when they have the stability of financial support to mitigate upfront risks.

Recognition of the specific qualities, opportunities and challenges inherent in the festivals sector, as outlined in this report, and their alignment to an appropriate festivals policy in each of the national arts funding bodies is a key first step in investing in the sector. Any reviews of festival funding should recognise the inherent challenges and drawbacks of yearly events being locked into short term funding cycles, and the resultant impact on ambition, sustainability and viability that result from this. Conversely, a festivals funding policy that enabled festivals to plan with confidence and imagination would reap rewards not only for the UK arts infrastructure but also its creative workforces, and the many communities that are enriched by their festivals.

Should there be capacity for increased public funding for festivals, channelling this into tailored festivals support could help the resilience of the sector. Based on the research, the most beneficial areas for this support are in relation to: mitigating the rising costs of staging festivals; the costs associated with adopting environmental responsibility measures, and engaging artists and performers who are creating new works and commissions.

Developmental support for festivals seems to be largely related to increasing education and training opportunities in key areas. Based on the responses to the survey, education and training seems to be most necessary in relation to fiscal management (including diversifying income sources) and implementing environmental responsibility measures. This could be done either through bespoke training programmes targeted at the festivals sector or through signposting festivals towards existing cultural sector specific training and resources.

Additionally, increasing and facilitating opportunities for peer learning and exchange, for example through peer networks and membership bodies like BAFA can also allow festivals to learn from the experiences of others, helping to further strengthen the resilience of the sector.

More broadly, although the research has helped to understand the state of the sector today, there are also opportunities for further research into the sector through a series of possible “deep dives”. These could include:

- Economic activity assessments to understand the detailed working of a suite of case study festivals that operate at a range of different scales
- Longitudinal tracking of attendances over a longer period of time to understand changes in audience behaviour
- Greater interrogation of the cause behind the rising costs felt in the sector, for example by looking at the change in specific cost lines over time.

Appendix 1: The average festival

Through the research, we have been able to identify the shape of an "average festival", that is the arts festival that would exist if it was the absolute average of all characteristics. This is not to say that all festivals will conform to all or even some of these characteristics, rather that, if we were to try and paint a picture of what a festival might look like if it were to encompass the average response it would take the following (and, at times, potentially contradictory) form. The average festival…

- takes place across multiple venues in an urban setting over the course of a week.
- programmes a range of different artforms, with classical music as the lynch pin of its programming. This is supplemented by a programme of poetry and folk music.
- programmes around 30 artists and these are nearly all professional artists.
- will feature new works and commissions as part of its programme, and there will be six of these throughout the course of the festival.
- sells tickets for events and issues around 3,500 tickets for its in-person events each year. It also offers a programme of free events and in recent years has introduced both free and paid-for online events which have grown in popularity since the Covid-19 pandemic.
- sees the largest proportion of its audience come from within a five-mile radius of the festival, although it attracts visitors from a range of different distances, including those from significantly further away.
- has a mainly adult audience, although it will have some child attendees, either as part of its main programme or through specific "family friendly" activities.
- runs workshops and masterclasses throughout the year as part of its community and outreach activities, and also has an ongoing educational programme.
- is dependent on volunteering, with around 35 volunteers during its festival and 10 year-round compared to only four employees year-round and eight during the festival.
- is a charitable organisation, and operates as a company limited by guarantee alongside its charitable status.
- spends slightly more than it makes, with an income of around £220k and an expenditure of £245k. However, it has only reported a change of 10% or less in its reserves, suggesting that it has enough to keep its head above water in the short term.
- spends around 60% of its expenditure on running the actual festival, through performer costs and staging costs.

- gets around a third of its income from box office sales and is also in receipt of public funding, which accounts for just under a third of its income. It also gets a fifth of its income from fundraising efforts.

Appendix 2: List of participating festivals

The following festivals participated in the survey, and those with more than one submission are highlighted in bold.

- Aberjazz Festival - Fishguard Jazz and Blues Festival 2023
- Aldeburgh Festival
- Arvo Pärt...and a Littlemore
- BBC Proms
- Big Burns Supper
- Borders Book Festival
- Brecon Baroque Festival
- Brecon Choir Festival
- Brecon Jazz
- Brighton Early Music Festival
- Brighton Festival
- Broadstairs Folk Week
- Budleigh Music Festival
- Buxton Festival Fringe
- Cambridge Literary Festival
- Carmarthen Bay Film Festival
- Cheltenham Festivals (4)
- Chiltern Arts
- Corbridge Chamber Music Festival
- Devizes Arts Festival
- DF Concerts (2)
- East Neuk Festival
- Edinburgh Festival Fringe
- Edinburgh International Book Festival
- Edinburgh International Children's Festival
- Edinburgh International Festival
- EFG London Jazz Festival
- Festival of Crafts
- Fishguard Festival of Music
- Fringe by the sea
- Fuse Festival
- Glasgow International Piping Festival - Piping Live!
- Góbéfest
- Harrogate International Festivals (5)
- Hay Festival - Hay on Wye
- Herne Bay Jazz Festival
- Hertfordshire Festival of Music 2023
- Hijinx Unity Festival
- IF Oxford
- Iur Cinn Fleadh
- Kendal Mountain Festival
- Kings lynn Festival
- Leeds Opera Festival
- Lichfield Festival
- LIFT 2022
- Lightpool Festival
- Lightwaves Salford
- Liverpool Biennial 2023, uMoya: The Sacred Return of Lost Things
- Machynlleth Festival
- Manchester International Festival
- Manchester Jazz Festival
- MELA
- Music@Malling
- New Forest Folk Festival
- Newark Book Festival
- Newbury Spring Festival
- Open House Festival
- Open Space 70
- Out of the Ordinary Festival
- Petworth Festivals (2)
- Ports Fest
- Prescot Festival of Music & the Arts
- Presteigne Festival, 24-28 August 2023
- Priddy Folk Festival
- Proms at St Jude's
- Red Violin
- Rhondda Arts Festival
- Saltaire Festival
- Sidmouth Folk Festival
- Sonica Glasgow
- Southwell Music Festival

- Spectra, Scotland's Festival of Light
- SPILL Festival 2023
- Spitalfields Music Festival
- St Magnus International Festival
- Stainsby Festival
- Stour Music
- Stranraer Oyster Festival
- Swaledale Festival
- Tete a Tete: The Opera Festival
- Thaxted Festival 2023
- The English Music Festival
- The Gate to Southwell Festival
- The Lammermuir Festival
- Three Choirs Festival
- Totally Thames
- Towersey Festival
- Tropical Pressure Festival
- Ventnor Fringe Festival
- Whiddon Autumn Festival
- Wigtown Book Festival
- Wimbledon BookFest

Appendix 3: Survey questions

Note: due to the format of the survey, some questions were repeated where organisations operated more than one festival. To that end, although the questions presented below is the full suite of unique questions, there is a jump in the chronological numbering of questions which matches these repeated cycles.

Section	Question Number	Question	Answer type	Answer codes
General information	Q3	What is the full name of the festival(s) you organise that you are responding about in this survey?	Open text	
	Q4_1	Your full name	Open text	
	Q4_2	Your role within your organisation	Open text	
	Q4_3	Your professional email address	Open Text	
	Q5	What is the legal status of your festival organisation?	Multiple choice – select all that apply	Limited company (A company 'limited by shares' - i.e. businesses that make a profit - or a company 'limited by guarantee' - i.e. 'not for profit') Unincorporated association (An organisation set up through an agreement between a group of people who come together for a reason other than to make a profit) Sole trader (Self-employed person who owns and runs their own business as an individual) Charitable trust (Public trust for purposes that provide a benefit to the public or a section of the public and is a trust subject to supervision by the Charity Commission) Local authority department or project (Department or project within a local district, borough or county council) Combined authority department or project (Department or project within a combined authority - i.e. group of two or more councils operating in collaboration) Charitable Incorporated Organisation (A corporate body which is not a company incorporated under the Companies Acts; designed and available to charitable organisations only)

Section	Question Number	Question	Answer type	Answer codes
				Community Interest Company (Limited companies which operate to provide a benefit to the community they serve) Partnership (Relationship between two or more persons carrying on business in common with a view to profit) Part of another organisation / No separate legal status Other (please specify)
General information	Q6	Is your organisation a charity?	Multiple choice - restricted	Yes / No
	Q7	To avoid duplication, please can you provide your charity number?	Open text	
	Q8	To avoid duplication, please can you provide your company number? If your organisation is not a registered company, please enter 0	Open text	
	Q9	Does your organisation have responsibility for a venue?	Multiple choice - restricted	Yes / No
About your festival	Q11	Please enter the name of the single festival that these responses relate to	Open text	
	Q12	Where is your festival predominantly located? - Selected Choice	Multiple choice - restricted	England - East Midlands England - London England - North East England - North West England - South East England - South West England - West Midlands England - Yorkshire Northern Ireland Scotland Wales

Section	Question Number	Question	Answer type	Answer codes
	Q13	Which of these best characterises where your festival predominantly takes place?	Multiple choice – restricted	Urban, single venue (e.g. church, theatre, pub) Urban, multiple venues (e.g. church, theatre, pub) Urban, outside space (e.g. field, park, public realm) Rural, single venue (e.g. church, theatre, pub) Rural, multiple venues (e.g. church, theatre, pub) Rural, outside space (e.g. field, park, public realm)
About your festival	Q14	Is there overnight camping for audience members at your festival?	Multiple choice – restricted	Yes / No
	Q15	How many days does your festival run? Please refer to the full advertised duration of your most recent festival period (e.g. 10 June 2023 - 17 June 2023 would be 8 days)	Open text	
	Q16	Within your festival duration, on how many days were events programmed?	Open text	
	Q17	How often does the festival take place? - Selected Choice	Multiple choice – restricted	Every six months Every year Every two years Other (please specify)
	Q18	Does your festival have a single-ticket entry for the duration of the festival, or one ticket for each festival event programmed?	Multiple choice – restricted	Single-ticket entry One ticket for each festival event No ticket is required / free entry We offer both single-tickets entry and individual festival event tickets
	Q19	How many events do you programme within your festival? This is the number of acts within your festival across all stages	Open text	
	Q20	How many events do you programme within your festival? This is the number of events for which tickets can be booked	Open text	

Section	Question Number	Question	Answer type	Answer codes
Festival programming	Q21	Which artform(s) were included in your 2023 festival? Please tick all that apply:	Multiple choice-select all that apply	Classical music (Western classical music) Classical music (Music outside the Western canon) Comedy Dance Film Folk Jazz Literature Opera Poetry, including spoken word Popular / Contemporary Music Science Theatre Traditional music of global majorities Visual Arts Other (please specify)
	Q22	And which of these artforms was the main artform at your festival?	Multiple choice – restricted	Generated from answers to Q21
	Q23	How many artists took part in your festival in the most recent year? By this we mean performing acts, not individual performers (e.g. an orchestra counts as one artist, whilst a collaboration between an orchestra and a band counts as two artists and two soloists with an orchestra would count as three artists - it may be helpful to work on the basis of the number of contracts that you have issued)	Open text	

Section	Question Number	Question	Answer type	Answer codes
Festival programming	Q24	What proportion of artists taking part in your festival in the most recent year were 'professional' artists (i.e. artists paid for their involvement)? These answers should correspond to percentages but please only report the percentage value and not a % sign, e.g., 40 rather than 40%.	Open text	
	Q25	Has your festival hosted any new work, commissions, and premieres (inclusive of UK premieres) in 2023?	Multiple choice – restricted	Yes / No
	Q26	If yes, how many new works and/or premieres did your festival host in 2023?	Open text	
Attendance	Q28	Please estimate the number of tickets purchased at your festival in 2019. Please include free ticketed events in this category	Open text matrix table	Ticketed in person Ticketed online
	Q29	Please estimate the number of people attending the following types of events at your festival in 2019. Please exclude free ticketed events from this category	Open text matrix table	Free in-person Free online
	Q30	Please estimate the number of accessible or free companion tickets booked for ticketed, in-person events at your festival, including free ticketed events, in 2019.	Open text	
	Q31	Please estimate the number of tickets purchased at your festival in 2023. Please include free ticketed events in this category	Open text matrix table	Ticketed in person Ticketed online
	Q32	Please estimate the number of people attending the following types of events at your festival in 2023. Please exclude free ticketed events from this category - Free, in-person events	Open text matrix table	Free in-person Free online

Section	Question Number	Question	Answer type	Answer codes
Attendance	Q33	Please estimate the number of accessible or free companion tickets booked for ticketed, in-person events at your festival, including free ticketed events, in 2023.	Open text	
	Q34	What proportion of your audience travelled the following distances to attend festival events in 2023?	Open text matrix table	Up to five miles 10 miles 20 miles 50 miles From elsewhere in the UK From overseas I do not have this information
	Q35	Please indicate the proportion of your festival audience that falls into the following age groups:	Open text matrix table	Children (under 18 years old) Adult (18 years old and above) I do not have this information
Education and outreach	Q141	Does your organisation run any education, community and/or outreach activities either during or outside of your festival?	Multiple choice – restricted	Yes / No
	Q142	What activities does this include?	Multiple choice – select all	Ongoing educational programmes (excluding one-off activity, such as workshops & masterclasses) Workshops & masterclasses Other (please specify)
	Q143	Do you engage someone specifically to run your activities / programme?	Multiple choice – restricted	Yes / No
	Q144	When do the activities or programme take place?	Multiple choice – restricted	During the festival only At other times in the year Both, during the festival and at other times in the year

Section	Question Number	Question	Answer type	Answer codes
Education and outreach	Q145	Who benefits directly from the activities or programme? (select all that apply)	Multiple choice – select all	Schools Local community members Sector professionals (e.g., artists, performers) Other (please specify)
	Q146	What proportion of your overall activity is devoted to this strand of programming? These answers should correspond to percentages but please only report the percentage value and not a % sign, e.g., 40 rather than 40%.	Open text	
Festival employment	Q148	How many full-time equivalents (FTEs) are engaged in a paid capacity by your festival in the following categories?	Open text	
	Q149	How many of your total FTEs engaged in a paid capacity by your festival are freelance?	Open text	
	Q150	Typically, how many volunteers (including board, if applicable) work for your festival?	Open text	
Financial information	Q152	Is the following information based on confirmed accounts or estimates?	Multiple choice – restricted	Confirmed accounts Estimated figures
	Q153	Are these accounts for your whole organisation or solely for your festival?	Multiple choice – restricted	Whole organisation Festival only
	Q154	What was the total income during the financial year which included your 2023 festival? Please share figures from your annual accounts, not specific festival project costs.	Open text	
	Q155	What was the total expenditure during the financial year which included your 2023 festival?	Open text	
	Q156	What was the surplus (deficit) during the financial year which included your 2023 festival?	Open text	

Section	Question Number	Question	Answer type	Answer codes
	Q157	What was the accumulated surplus (deficit) during the financial year which included your 2023 festival?	Open text	
	Q158	What percentage of your gross income came from the following sources:	Open text matrix table	Box office / ticket sales (or equivalent) Food & beverage sales Merchandising, retail & services Local authority/ies including combined authorities Creative Scotland Arts Council England Arts Council of Northern Ireland Arts Council of Wales Charitable trusts and foundations Commercial sponsors in cash or kind Individual donations, including gift aid Membership schemes Other earned income - please specify what this other income is
	Q159	Please list your expenditure in 2023 in the following categories:	Open text matrix table	Total expenditure on core staff for your festival (includes year-round full-time or part-time staff members) Total expenditure on local office costs for the festival Total expenditure on fundraising Total expenditure on overhead costs Total expenditure on performers/artists/speakers from the UK (i.e. those based in the UK) Total expenditure on performers/artists/speakers from overseas (i.e. those based overseas) Total expenditure related to staging your festival (includes event production, stewarding, toilets, catering, event marketing and promotion, insurance / licensing / compliance)

Section	Question Number	Question	Answer type	Answer codes
	Q160	During the financial year that included your 2023 festival, has the value of your reserves (including restricted, unrestricted, designated, and endowment funds)….	Multiple choice – restricted	Increased by 20% or more Increased by between 10% and 19% Stayed the same or changed by less than 10% Decreased by between 10% and 19% Decreased by 20% or more Not applicable, we do not have reserves
	Q161	Compared to the 2019 festival year (i.e. the last operational year prior to the Covid-19 pandemic), how has your festival's income changed?	Multiple choice – restricted	Increased by 20% or more Increased by between 10% and 19% Stayed the same or changed by less than 10% Decreased by between 10% and 19% Decreased by 20% or more Not applicable, we do not have reserves
	Q162	Compared to the 2019 festival year (i.e. the last operational year prior to the Covid-19 pandemic), how has your festival's expenditure changed?	Multiple choice – restricted	Increased by 20% or more Increased by between 10% and 19% Stayed the same or changed by less than 10% Decreased by between 10% and 19% Decreased by 20% or more Not applicable, we do not have reserves
Environmental sustainability	Q163	Has your festival implemented any measures to improve the overall environmental sustainability of your festival?	Multiple choice – restricted	Yes / No/ I don’t know
	Q164	On a scale of 1 - 5, where 1 is "very easy" and 5 is "very hard", how easy have you found it to improve the sustainability of your festival?	Likert scale	
	Q165	Please tell us more about your answer	Open text	

Section	Question Number	Question	Answer type	Answer codes
Environmental responsibility	Q166	Does your festival participate in any of the following environmental sustainability initiatives? (Select all that apply) - Selected Choice - Access to drinkable water/ water efficiency measures	Multiple choice – select all that apply	Access to drinkable water/ water efficiency measures Advocating or campaigning for climate and environmental action. Creating clearly defined roles and responsibilities on climate and environmental action within our organisation Discounts and incentives for sustainable audience behaviour Eliminating the use of diesel-fuelled generators External climate communication (policy, commitment on the website) Locally sourced produce / services Meeting temporary power requirements from portable renewable sources No single use plastics on site Protecting and enhancing nature and biodiversity Reducing production impacts (materials, printing, signage, etc) Sustainable audience / performer transport initiatives Sustainable procurement policy and/or engage with suppliers to improve the sustainability of their operations Use of a Green Rider (offers environmental guidelines for all touring artists and companies) Using sustainable packaging and/or serveware Vegan / vegetarian catering Working with partners working in sustainability Other - please specify
	Q167	Does your festival use any environmental sustainability tracking tools, including but not limited to the Julie's Bicycle Creative Climate Tools?	Multiple choice – restricted	Yes / No
	Q168	Would you be happy to share this research with us as part of this sector review project?	Multiple choice – restricted	Yes / No
	Q169	Does your festival have an environmental sustainability policy?	Multiple choice – restricted	Yes / No

Section	Question Number	Question	Answer type	Answer codes
	Q170	Would you be happy to share this with us as part of this sector review project?	Multiple choice – restricted	Yes / No
	Q171	Please provide some information of any support that would help you to further improve the environmental sustainability of your festival's activities	Open text	
EDI	Q172	Are you engaging in any of the following initiatives relating to equality, diversity, and inclusion (EDI)?	Multiple choice – select all that apply	Regular training on issues around EDI (e.g. disability awareness unconscious bias, anti-racism) Collecting and reporting on demographic data of staff members and/or board members Collecting and reporting on demographic data of performers / artists Collecting and reporting on demographic data of audiences EDI working group in staff team EDI Lead (e.g. individual financially compensated for taking on this work) EDI Board Champion EDI strategy and action plan Regular progress/monitoring on EDI agenda Completed an access or digital access audit (i.e. commissioned an external consultancy report on disability access to your festival) Training for volunteers and temporary staff on accessibility and inclusivity measures in place at your festival(s)
Additional research documents	Q174	Have you undertaken, or are you aware of, any research that has been undertaken, or that is underway, into the economic impact of your festival or of festivals generally in the UK or abroad?	Multiple choice – restricted	Yes / No
	Q175	Would you be happy to share this research with us as part of this sector review project?	Multiple choice – restricted	Yes / No

Section	Question Number	Question	Answer type	Answer codes
Additional research documents	Q176	Have you undertaken or have access to any research on the broader social and/or personal impacts of your festival on its audiences, staff, volunteers or participants? This could include impacts on mental health, wellbeing, social inclusion or social justice	Multiple choice – restricted	Yes / No
	Q177	Would you be happy to share this research with us as part of this sector review project?	Multiple choice – restricted	Yes / No
Close	Q178	Would you be happy for either BAFA or BOP Consulting to contact you for any follow up research related to this survey? This could include, but is not limited to, requests for copies of research you may have conducted and said you are happy to share, invitations to take part in focus groups, and invitations to take part in case study interviews	Multiple choice – restricted	Yes / No

Appendix 4: Full data tables

Q5. What is the legal status of your festival organisation? (n=92)

Answer Code	% responses
Limited company (A company 'limited by shares' - i.e. businesses that make a profit - or a company 'limited by guarantee' - i.e. 'not for profit')	35
Unincorporated association (An organisation set up through an agreement between a group of people who come together for a reason other than to make a profit)	4
Sole trader (Self-employed person who owns and runs their own business as an individual)	-
Charitable trust (Public trust for purposes that provide a benefit to the public or a section of the public and is a trust subject to supervision by the Charity Commission)	19
Local authority department or project (Department or project within a local district, borough or county council)	3
Combined authority department or project (Department or project within a combined authority - i.e. group of two or more councils operating in collaboration)	-
Charitable Incorporated Organisation (A corporate body which is not a company incorporated under the Companies Acts; designed and available to charitable organisations only)	12
Community Interest Company (Limited companies which operate to provide a benefit to the community they serve)	2
Partnership (Relationship between two or more persons carrying on business in common with a view to profit)	-
Part of another organisation / No separate legal status	1
Other (please specify)	2

Q12. Where is your festival predominantly located? - Selected Choice (n=101)

Answer Code	% responses
England - East Midlands	5%
England - London	8%
England - North East	3%
England - North West	10%
England - South East	21%
England - South West	14%
England - West Midlands	2%
England - Yorkshire	7%
Northern Ireland	2%
Scotland	18%
Wales	11%

Q13. Which of these best characterises where your festival predominantly takes place? (n=101)

Answer Code	% responses
Urban, single venue (e.g. church, theatre, pub)	5%
Urban, multiple venues (e.g. church, theatre, pub)	44%
Urban, outside space (e.g. field, park, public realm)	13%
Rural, single venue (e.g. church, theatre, pub)	1%
Rural, multiple venues (e.g. church, theatre, pub)	30%
Rural, outside space (e.g. field, park, public realm)	8%

Q14. Is there overnight camping for audience members at your festival? (n=101)

Answer Code	% responses
Yes	12%
No	88%

Q15. How many days does your festival run? Please refer to the full advertised duration of your most recent festival period (e.g. 10 June 2023 - 17 June 2023 would be 8 days) (n=99)

Answer Code	% responses
1-5	36%
6-10	28%
11-15	12%
16-20	10%
21+	13%

Q16. Within your festival duration, on how many days were events programmed? (n=98)

Answer Code	% responses
1-5	36%
6-10	32%
11-15	12%
16-20	9%
21+	11%

Q17. How often does the festival take place? - Selected Choice (n=101)

Answer Code	% responses
Every six months	-
Every year	86%
Every two years	6%
Other (please specify)	8%

Q19. How many events do you programme within your festival? This is the number of acts within your festival across all stages. (n=29)

Answer Code	% responses
<20	31%
21-40	14%
41-60	14%
60+	41%

Q20. How many events do you programme within your festival? This is the number of events for which tickets can be booked. (n=29)

Answer Code	% responses
1-20	29%
21-40	25%
41-60	16%
61-80	4%
81-100	6%
101-150	3%
151-200	6%
201+	12%

Q21. Which artform(s) were included in your 2023 festival? Please tick all that apply: - Selected Choice (n=92)

Answer Code	% responses
Science	12%
Opera	16%
Other (please specify)	22%
Classical music (Music outside the Western canon)	27%
Comedy	27%

Answer Code	% responses
Traditional music of global majorities	30%
Theatre	32%
Popular / Contemporary Music	34%
Film	35%
Literature	36%
Visual Arts	39%
Dance	42%
Jazz	43%
Folk	45%
Poetry, including spoken word	48%
Classical music (Western classical music)	54%

Q23. How many artists took part in your festival in the most recent year? By this we mean performing acts, not individual performers (e.g. an orchestra counts as one artist, whilst a collaboration between an orchestra and a band counts as two artists and two soloists with an orchestra would count as three artists - it may be helpful to work on the basis of the number of contracts that you have issued). (n=91)

Answer Code	% responses
0	1%
1-20	18%
21-40	27%
41-60	13%
61-80	11%
81-100	9%
101-200	7%
201-300	5%
301-400	3%
401+	5%

Q24. What proportion of artists taking part in your festival in the most recent year were 'professional' artists (i.e. artists paid for their involvement)? These answers should correspond to percentages but please only report the percentage value and not a % sign, e.g., 40 rather than 40%. (n=92)

Answer Code	% responses
0	1%
1-20	3%

Answer Code	% responses
21-40	5%
41-60	6%
61-80	17%
81-100	68%

Q25. Has your festival hosted any new work, commissions, and premieres (inclusive of UK premieres) in 2023? (n=93)

Answer Code	% responses
Yes	62%
No	38%

Q26. If yes, how many new works and/or premieres did your festival host in 2023? (n=57)

Answer Code	% responses
1-5	47%
6-10	25%
11-15	9%
16-19	-
20+	19%

Q28. Please estimate the number of tickets purchased at your festival in 2019. Please include free ticketed events in this category.

Answer Code	% responses
Ticketed, in-person events (n=75)	
0	9%
<500	8%
500-999	8%
1,000-4,999	39%
5,000-9,999	9%
10,000-14.999	4%
15,000-49,999	12%
50,000+	11%
Ticketed, online events (n=64)	
0	90%
<500	0%

Answer Code	% responses
500-999	-
1,000-4,999	-
5,000-9,999	2%
10,000-14.999	-
15,000-49,999	-
50,000+	2%

Q29. Please estimate the number of people attending the following types of events at your festival in 2019. Please exclude free ticketed events from this category

Answer Code	% responses
Free, in-person events (n=72)	
0	26%
<500	18%
500-999	10%
1,000-4,999	12%
5,000-9,999	7%
10,000-14.999	3%
15,000-49,999	15%
50,000+	8%
Free, online events (n=57)	
0	88%
<500	5%
500-999	-
1,000-4,999	3%
5,000-9,999	-
10,000-14.999	-
15,000-49,999	2%
50,000+	2%

Q30. Please estimate the number of accessible or free companion tickets booked for ticketed, in-person events at your festival, including free ticketed events, in 2019. (n=66)

Answer Code	% responses
0	26%
<500	56%
500-999	6%

Answer Code	% responses
1,000-4,999	6%
5,000-9,999	3%
10,000-14.999	-
15,000-49,999	2%
50,000+	2%

Q31. Please estimate the number of tickets purchased at your festival in 2023. Please include free ticketed events in this category

Answer Code	% responses
Ticketed, in-person events (n=75)	
0	1%
<500	5%
500-999	11%
1,000-4,999	37%
5,000-9,999	13%
10,000-14.999	8%
15,000-49,999	12%
50,000+	12%
Ticketed, online events (n=64)	
0	68%
<500	18%
500-999	2%
1,000-4,999	5%
5,000-9,999	2%
10,000-14.999	2%
15,000-49,999	3%
50,000+	-

Q32. Please estimate the number of people attending the following types of events at your festival in 2023. Please exclude free ticketed events from this category - Free, in-person events

Answer Code	% responses
Free, in-person events (n=72)	
0	21%
<500	25%
500-999	7%
1,000-4,999	14%

Answer Code	% responses
5,000-9,999	5%
10,000-14.999	4%
15,000-49,999	14%
50,000+	10%
Free, online events (n=60)	
0	77%
<500	3%
500-999	2%
1,000-4,999	10%
5,000-9,999	5%
10,000-14.999	2%
15,000-49,999	-
50,000+	-

Q33. Please estimate the number of accessible or free companion tickets booked for ticketed, in-person events at your festival, including free ticketed events, in 2023. (n=66)

Answer Code	% responses
0	17%
<500	68%
500-999	5%
1,000-4,999	6%
5,000-9,999	2%
10,000-14.999	-
15,000-49,999	3%
50,000+	-

Q34. What proportion of your audience travelled the following distances to attend festival events in 2023? (n=80)

Answer Code	% responses
Up to five miles	39%
10 miles	14%
20 miles	17%
50 miles	13%
From elsewhere in the UK	14%

Q35. Please indicate the proportion of your festival audience that falls into the following age groups: (n=53)

Answer Code	% responses
Children (under 18 years old)	14%
Adult (18 years old and above)	86%

Q141. Does your organisation run any education, community and/or outreach activities either during or outside of your festival?:

Answer Code	% responses
Yes	86%
No	14%

Q142. What activities does this include? - Selected Choice

Answer Code	% responses
Ongoing educational programmes (excluding one-off activity, such as workshops & masterclasses)	54%
Workshops & masterclasses	66%
Other (please specify)	39%

Q143. Do you engage someone specifically to run your activities / programme?

Answer Code	% responses
Yes	59%
No	41%

Q144. When do the activities or programme take place?

Answer Code	% responses
During the festival only	17%
At other times in the year	15%
Both, during the festival and at other times in the year	68%

Q145. Who benefits directly from the activities or programme? (select all that apply) - Selected Choice

Answer Code	% responses
Schools	78%
Local community members	85%
Sector professionals (e.g., artists, performers)	56%
Other (please specify)	15%

Q146. What proportion of your overall activity is devoted to this strand of programming? These answers should correspond to percentages but please only report the percentage value and not a % sign, e.g., 40 rather than 40%. (n=56)

Answer Code	% responses
0%	-
1-20%	77%
21-40%	16%
41-60%	5%
61-80%	2%
81-100%	-

Q148. How many full-time equivalents (FTEs) are engaged in a paid capacity by your festival in the following categories?

Answer Code	% responses
Permanent full-time (n=56)	
0	46%
1-5	29%
6-10	5%
11-20	7%
20-50	11%
50+	2%
Permanent part-time (n=62)	
0	20%
1-5	65%
6-10	13%
11-20	2%
20-50	-
50+	-
Full-time for the festival only (n=51)	
0	27%
1-5	31%
6-10	14%

Answer Code	% responses
11-20	4%
20-50	18%
50+	6%
Part-time for the festival only (n=53)	
0	30%
1-5	42%
6-10	15%
11-20	2%
20-50	8%
50+	4%
Casual / sessional (n=50)	
0	29%
1-5	40%
6-10	10%
11-20	10%
20-50	4%
50+	6%

Q150. Typically, how many volunteers (including board, if applicable) work for your festival?

Answer Code	% responses
Year-round (n=63)	
0	14%
1-20	71%
21-40	6%
41-60	-
61-80	3%
81-100	-
100+	5%
During the festival only (n=67)	
0	10%
1-20	25%
21-40	24%
41-60	10%
61-80	7%
81-100	1%
100+	21%

Q152. Is the following information based on confirmed accounts or estimates? (n=68)

Answer Code	% responses
Confirmed accounts	65%
Estimated figures	35%

Q154. What was the total income during the financial year which included your 2023 festival? Please share figures from your annual accounts, not specific festival project costs. (n=58)

Answer Code	% responses
Up to £100,000	31%
£100,001-£500,000	38%
£500,001-£1,000,000	12%
£1,000,001-£5,000,000	10%
£5,000,000+	9%

Q155. What was the total expenditure during the financial year which included your 2023 festival? (n=58)

Answer Code	% responses
Up to £100,000	29%
£100,001-£500,000	36%
£500,001-£1,000,000	12%
£1,000,001-£5,000,000	14%
£5,000,000+	9%

Q158. What percentage of your gross income came from the following sources: (n=61)

Answer Code	% responses (average)
Box office / ticket sales	34%
Fundraising	19%
Public funding	20%
Other earned income	12%
Commercial sponsors	7%
Membership schemes	3%
Food & beverage sales	3%

Answer Code	% responses (average)
Merchandising, retail & services	2%

Public funding income in 2023 as a proportion of all income broken down by income size of organisation (n=61)

Income Size	% public funding income
Small (less than £250,000)	21%
Medium (£250,000-£750,000)	19%
Large (above £750,000)	20%

Q159. Please list your expenditure in 2023 in the following categories: (n=40)

Answer Code	% responses (average)
Core staff	21%
Local office costs	2%
Fundraising	2%
Overhead costs	7%
Performers/artists/speakers from the UK	28%
Performers/artists/speakers from overseas	3%
Staging	27%

Festival profit

Revenue type	% festivals
Net gain	55%
Net loss	41%
Broke even	4%

Q160. During the financial year that included your 2023 festival, has the value of your reserves (including restricted, unrestricted, designated, and endowment funds)…. (n=54)

Answer Code	% responses
Increased by 20% or more	6%
Increased by between 10% and 19%	7%

Answer Code	% responses
Stayed the same or changed by less than 10%	46%
Decreased by between 10% and 19%	13%
Decreased by 20% or more	17%
Not applicable, we do not have reserves	11%

Q161. Compared to the 2019 festival year (i.e. the last operational year prior to the Covid-19 pandemic), how has your festival's income changed? (n=50)

Answer Code	% responses
Reduced by more than 20%	24%
Reduced by up to 20%	24%
Remained the same	20%
Grown by up to 20%	16%
Grown by more than 20%	16%

Q162. Compared to the 2019 festival year (i.e. the last operational year prior to the Covid-19 pandemic), how has your festival's expenditure changed? (n=50)

Answer Code	% responses
Reduced by more than 20%	20%
Reduced by up to 20%	6%
Remained the same	14%
Grown by up to 20%	32%
Grown by more than 20%	28%

Q163. Has your festival implemented any measures to improve the overall environmental sustainability of your festival? (n=57)

Answer Code	% responses
Yes	79%
No	16%
I don't know	5%

Q164. On a scale of 1 - 5, where 1 is "very easy" and 5 is "very hard", how easy have you found it to improve the sustainability of your festival? (n=45)

Answer Code	% responses
Very easy	2%

Answer Code	% responses
Easy	13%
Neutral	51%
Hard	24%
Very hard	9%

Q166. Does your festival participate in any of the following environmental sustainability initiatives? (Select all that apply). (n=44)

Answer Code	% responses
Locally sourced produce / services	85%
Reducing production impacts (materials, printing, signage, etc)	69%
Access to drinkable water/ water efficiency measures	63%
No single use plastics on site	60%
Sustainable audience / performer transport initiatives	50%
Vegan / vegetarian catering	46%
Using sustainable packaging and/or serveware	44%
Working with partners working in sustainability	44%
Advocating or campaigning for climate and environmental action	42%
Creating clearly defined roles and responsibilities on climate and environmental action within our organisation	42%
Sustainable procurement policy and/or engage with suppliers to improve the sustainability of their operations	37%
External climate communication (policy, commitment on the website)	33%
Eliminating the use of diesel-fuelled generators	31%
Protecting and enhancing nature and biodiversity	27%
Use of a Green Rider (offers environmental guidelines for all touring artists and companies)	15%
Discounts and incentives for sustainable audience behaviour	13%
Meeting temporary power requirements from portable renewable sources	12%
Other - please specify	4%

Q169. Does your festival have an environmental sustainability policy? (n=57)

Answer Code	% responses
Yes	53%

Answer Code	% responses
No	47%

Q170. Would you be happy to share this with us as part of this sector review project? (n=29)

Answer Code	% responses
Yes	76%
No	24%

Q171. Please provide some information of any support that would help you to further improve the environmental sustainability of your festival's activities. (n=31)

Answer Code	% responses
Collaboration and knowledge sharing	10%
Training	23%
Transport challenges	19%
Funding and policy support	19%
Other	29%

Q172. Are you engaging in any of the following initiatives relating to equality, diversity, and inclusion (EDI)? (Select all that apply) (n=46)

Answer Code	% responses
EDI Lead (e.g. individual financially compensated for taking on this work)	15%
EDI working group in staff team	24%
Completed an access or digital access audit (i.e. commissioned an external consultancy report on disability access to your festival)	24%
EDI Board Champion	28%
EDI strategy and action plan	43%
Regular progress/monitoring on EDI agenda	46%
Regular training on issues around EDI (e.g. disability awareness unconscious bias, anti-racism)	54%
Collecting and reporting on demographic data of performers / artists	63%
Collecting and reporting on demographic data of audiences	63%
Training for volunteers and temporary staff on accessibility and inclusivity measures in place at your festival(s)	74%
Collecting and reporting on demographic data of staff members and/or board members	78%

Q173. Please provide information of any support that would help you to further improve the EDI activities of your festival(s)'s activities. (n=14)

Answer Code	% responses
Collaboration	7%
Guidelines and training	57%
Other	36%

Q174. Have you undertaken, or are you aware of, any research that has been undertaken, or that is underway, into the economic impact of your festival or of festivals generally in the UK or abroad? (n=56)

Answer Code	% responses
Yes	45%
No	55%

Q175. Would you be happy to share this research with us as part of this sector review project? (n=24)

Answer Code	% responses
Yes	68%
No	32%

Q176. Have you undertaken or have access to any research on the broader social and/or personal impacts of your festival on its audiences, staff, volunteers or participants? This could include impacts on mental health, wellbeing, social inclusion or social justice. (n=55)

Answer Code	% responses
Yes	22%
No	78%

Q177. Would you be happy to share this research with us as part of this sector review project? (n=12)

Answer Code	% responses
Yes	92%
No	8%

Q178. Would you be happy for either BAFA or BOP Consulting to contact you for any follow up research related to this survey? This could include, but is not limited to, requests for copies of research you may have conducted and said you are happy to share, invitations to take part in focus groups, and invitations to take part in case study interviews. (n=55)

Answer Code	% responses
Yes	76%
No	24%

Source: BOP Consulting 2024

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