

2024

# European Festival Report



THIRD EDITION



**FEST TEAM** 



  
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**20-22**  
**JUNE**  
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AURAFESTIVAL.BG

2025  
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# European Festival Report 2024

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# Welcome



**W**e are in the midst of a period of significant change for festivals. Audience behaviour and demands, especially among younger attendees, are changing rapidly; the continuing rise of stadium shows; inflation across the board while ticket prices have to be kept under control; headliner fees rising to near-unaffordable levels – are all signs that this is a time of transition. Yet, as futurologist Max Thinius told the European Festival Summit (EFS) in Karlsruhe this November: “The future doesn’t just happen – we shape it.”

So, this third edition of the *European Festival Report* will again share information and inspiration that will demonstrate the power of working together in these changing times.

This year, we have a special focus on DEI (diversity, equity, and inclusion). There are pages packed with information about how you can ensure your events are welcoming to everyone, plus links to even more advice online. Attracting more diverse audiences and broader lineups is not only commercially sensible but also the right thing to do. As Thinius advised the EFC delegation, “Don’t just think, ‘How can I make my festival future-proof?’ also think, ‘How can I positively shape the future for others with my festival?’”

The summer of 2024 saw record-breaking ticket sales and captivated millions across Europe, as explored in *The Festival Summer 2024* (pages 6–13). Despite economic pressures, festivals from across the continent have adapted with ingenuity and resilience, transforming logistical hurdles into opportunities for innovation. Yet, rising costs and the ongoing issue of artist affordability remain critical challenges, as highlighted in the results of the *European Festival Survey* (16–23).

We also focus on sustainability (24–28), showcasing some of the innovations from across Europe that you can also apply to your events. From Hungary’s Sziget Festival and its groundbreaking recycling and reusable initiatives to Norway’s Øya Festival championing nature conservation, these inspiring stories showcase how festivals are leading the charge toward a greener future.

Plus, there’s a look at what the fans want through a survey of 7,000 people (44–47), a special feature on how to solve the problem of ever-increasing headliner fees (57–60), and the latest on health and safety at festivals (50–54).

The *European Festival Report* wouldn’t be possible without the contributions of the hundreds of festivals, industry experts, and individuals who shared their insights, stories, and data. A huge thank-you to everyone who’s been involved with putting this together, and particularly to the advertisers, contributors, and teams at *IQ* and *YOUROPE*, who worked so hard to bring you this publication – the industry is better as a whole for your support.

I hope you find this report not only useful, interesting, and inspiring but that it also gives you the opportunity to look back on an incredible year in which millions of people’s lives were made brighter by all who work on festivals.

## James Drury

Editor

**A**s the year draws to a close, it is once again time to publish the *European Festival Report*. In 2022, we launched this publication together with our friends and partners at *IQ Magazine*, and today, we can confidently say that this format has become an indispensable part of the festival universe – a remarkable achievement thanks to a great partnership.

This is also the final publication within our three-year European project 3F: Future-Fit Festivals, which concludes at the end of the year. YOUROPE has used the last three years and the funding from the EU's Creative Europe programme to its advantage and for the benefit of the European festival industry. We reflect on a wealth of new tools, impactful communication campaigns, significant data collection efforts, as well as advocacy, training, and networking events that have brought us closer to one another and to the goal of raising the quality of our events. And we are delighted that we can continue to count on support for our work through European funding over the next four years.

In those three years, YOUROPE has further strengthened its position as the most-important and influential European organisation for popular music festivals, now representing the largest membership in its more than 25-year history. Our association serves as a platform where representatives of festivals of all sizes and from across Europe meet and engage as equals. One invaluable aspect of this is the constructive collaboration between organisers from all major entertainment companies and the independent sector, all working towards a better future for everyone – a quality we must cherish and nurture.

In the future, going it alone will not suffice. Economic influences, geopolitical and social developments, as well as changes in the behaviour and demands of artists – especially headliners – new and younger audience groups, and even our own teams, all impact our sector. We can only meet these challenges by continuing to cultivate the selfless exchange of experiences that has defined YOUROPE for a quarter of a century.

I would like to conclude this foreword with a heartfelt topic. As festival organisers, we must live up to our societal responsibilities. Accordingly, I earnestly appeal to everyone to continue standing steadfastly by our friends in Ukraine, even after over 1,000 days of war. In the spring, I had the opportunity to visit the country as part of the Music Ambassadors Tour organised by Music Saves Ukraine and was left deeply moved by the experience. The strength of the Ukrainian people, their determination to keep going, and their belief in and commitment to good profoundly impressed me. Equally striking, however, was the ongoing danger and destruction of essential infrastructure and cultural institutions caused by Putin's invasion of Ukraine. We must follow our hearts and help these incredible people.

One thing is clear: more than anything else, they long to once again enjoy the wonderful experiences and magical moments that we, elsewhere in Europe, bring to millions of people. Moments for which there will always be an audience, because they make a difference.

With that in mind, I hope you enjoy reading our *European Festival Report 2024*!

## Christof Huber

Chairman, YOUROPE – The European Festival Association



# The Festival Summer 2024

This year was a stand-out for many events, with excellent sales and millions of delighted fans across Europe. But it wasn't without its challenges. **James Drury** takes a look back over the season.



**A**s Primavera Sound's Marta Pallarès told YOUROPE's European Festival Summit in Germany in November: "Festivals are magical events that make you forget your problems for three days." And that was true for thousands of events this year, with 71% of festivals over 80% sold-out, up from 64% in 2023, according to our European Festival Survey (see page 16).

Festivals organised by Live Nation UK and Ireland, including Download, TRNSMT, Parklife, Reading and Leeds, and Isle of Wight, saw great success. "We'll host a total of almost 5m attendees at our festivals this summer, demonstrating that festivals remain vital to our cultural life," Live Nation UK & Ireland chair Denis Desmond reported earlier this year.

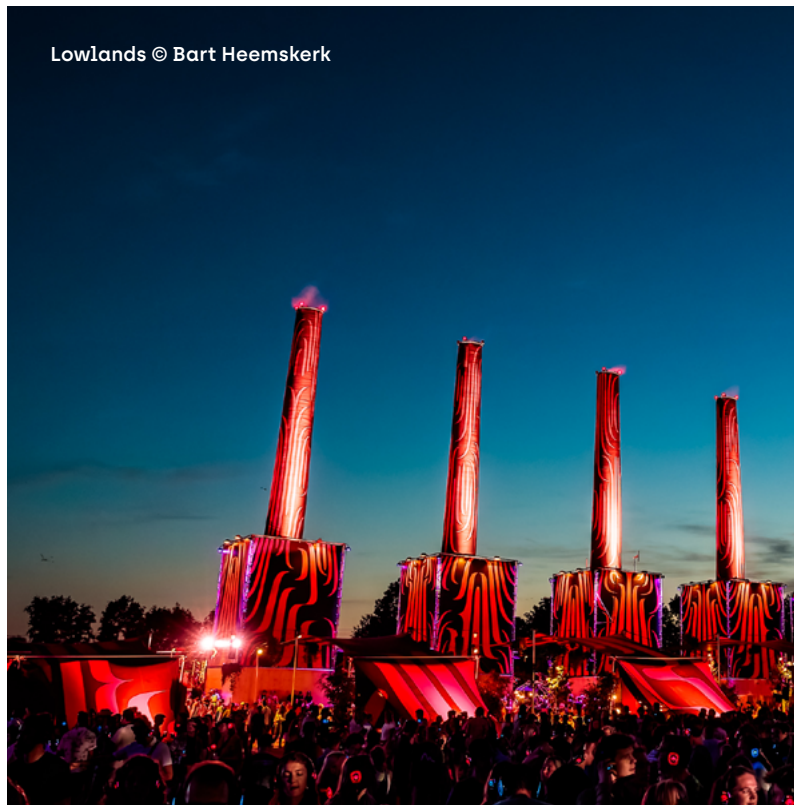
And Live Nation's operation in the Netherlands also reported excellent results, with its Lowlands festival selling out in the third-fastest time of less than 15 minutes. The festival's director, Eric van Eerdenburg, revealed the secret of the event's success to *IQ Magazine* earlier this year: "It's not just a lineup. It's a culture we've established over the last 25 years and have managed to stay in touch with. You're there for three days, getting dazzled by it all, and then you wake up and real life starts again."

Live Nation-owned Goodlive produces Lollapalooza Berlin, which drew 55,000 people to see Sam Smith, The Chainsmokers, Martin Garrix, Burna Boy, and Seventeen, while Superbloom in Munich drew 50,000 for the likes of Shirin David, Calvin Harris, and OneRepublic. "Overall, we are very thankful and satisfied with both festivals," says Goodlive's festival director, Fruzsina Szép. "In Berlin, we had two days of absolute sunshine. And in Munich, there wasn't a cloud in the sky on Saturday, and it started to rain very slightly in the late afternoon on Sunday, but it didn't change the atmosphere. People were celebrating and partying with a lot of emotion."

As the world's second-largest festival promoter after Live Nation, Superstruct also saw a strong 2024. It was a landmark year for the firm, which was acquired by private equity firm KKR for €1.3bn in June and subsequently saw CVC secure a stake in the company just a few weeks later. Superstruct owns and operates over 80 music festivals across ten countries in Europe and Australia, including Wacken Open Air, Parookaville,



Seaside Festival © Ben Zurbruggen Photography



Lowlands © Bart Heemskerck

**"Ten years ago, agents thought we were mad for planning six months ahead. Now, we're booking some bands two years in advance"**

**Adam Gregory, Bloodstock**

Tinderbox, Sónar, Øya, Benicàssim, and Kendal Calling.

The company's Sziget festival in Hungary celebrated its 30th anniversary, welcoming 60,000–70,000 people a day from more than 100 countries. "We wanted to close our first 30 years with a spectacular, vibrant, and diverse festival, to everyone's satisfaction, and it seems we succeeded based on the feedback," says Tamás Kádár, the festival's main organiser. "More than 30 years ago, we had a dream: a place where we could be together for a week, where everyone could experience personal freedom, the atmosphere, the 'flow' that a vibrant festival can provide, where different styles, programmes, and cultures can coexist. Sziget quickly became a symbol. An ideal world where we leave behind the worries of everyday life when we enter."

CTS Eventim-owned FKP Scorpio is another giant among European festival producers. Following a successful 2024, its flagship German events, Hurricane and Southside (produced with DreamHaus), sold 60,000 tickets for the 2025 events in less than 24 hours and before a single act was announced.

"Our festival business was strong: four of our five major festivals in Germany were sold out or very close to being sold out, and the ticket sales launch for Hurricane, Southside, Deichbrand, and M'era Luna each started with unprecedented



demand," says FKP Scorpio CEO Stephan Thanscheidt.

The two companies also promote Rock am Ring and Rock im Park, which both sold 50,000 tickets in a day for 2025 – breaking presale records – after the success of this year's events.

"It's crucial to sell tickets right after a festival," says Thanscheidt. "If you wait, it's much harder. With the excitement fresh, people are eager to return."

It was excellent news in southern Europe, where "the festival scene in Spain is vibrant and bustling," according to Mad Cool co-founder Javier Arnáiz. "While there are some logistical challenges and economic pressures, there's a surge of new events and innovative concepts. The overall energy is very positive."

Fellow Spanish festival Bilbao BBK Live also had great success, seeing an average of over 35,000 fans per day. "We are very pleased, because we've implemented improvements to enhance comfort and visibility, and the positive feedback from attendees shows they were effective," Eva Castillo, communications director at Last Tour, told *IQ Magazine*.

"We continue to appeal to new audiences – 70% of attendees are aged between 18 and 39 – while also retaining loyal fans who have been with us since the first edition. Additionally, we maintain a strong balance between international visitors from over 50 countries and our national and local audience."

This year's lineup featured Massive Attack, Grace Jones, The Prodigy, Jungle, Mulatu Astatke, Air, Ezra Collective, Los Planetas, MEUTE, Slowdive, Sen Senra, and María José Llergo.

And in the UK, AEG's BST Hyde Park notched up its 11th edition with performances by Robbie Williams, Shania Twain,

Andrea Bocelli, Stevie Nicks, Kylie, Kings of Leon, SZA, Morgan Wallen, and Stray Kids. Although the event didn't quite match the 550,000 ticket sales achieved last year, AEG European festivals CEO Jim King said: "We still had one of the most successful series ever, with 500,000 people coming to the park – which is incredible when you match that up against any event around the world. "What we're seeing is artists outperforming themselves because there's something magical about artists headlining shows in Hyde Park in the centre of London in the summer."

However, major sporting events – the Olympics and Paralympics in Paris and the UEFA European Championships in Germany – had a major impact on festivals in these key major markets. Lollapalooza Paris did not happen this year after security restrictions forced capacity to be restricted to 7,000 people. Live Nation France director Angelo Gopee told *IQ Magazine*: "We were advised to hold the festival on a single day to keep the Lollapalooza spirit alive in 2024 and not skip a year without a festival." However, the promoter decided to shelve this year's edition, with the festival set to return in July 2025.

And fellow French promoter, Arnaud Meersseman of AEG Presents France, which is behind Rock en Seine, told the European Festival Summit in Karlsruhe: "We had a great summer, but it was short because of the Olympics." Rock en Seine wasn't impacted by the Olympics; everything was either sold out or close to. "It was a good year for us," he reported.

Meanwhile in Finland, FKP Scorpio-owned Provinssi festival saw record attendance of 85,000 people, according to CEO Ville Koivisto. "It was a very good summer for us. We had a magnificent lineup. It's not the easiest task to secure big headliners at the moment, so we were delighted to get



Rock am Ring © Nils Lucas

Måneskin and Bring Me The Horizon. The production went smoothly, and we had overwhelmingly positive feedback from both visitors and all stakeholders."

French heavy metal festival Hellfest was headlined by Metallica and Foo Fighters and had an "exceptional" year, reports spokesperson Eric Perrin. "Once again, the festival sold out several months in advance, without a single band being announced, a strong indicator of the absolute trust that festivalgoers have in our organisation."

"The 2024 edition demonstrated that Hellfest is a one-of-a-kind festival in the world, with a distinctive ambiance, carried by meticulously crafted decoration. In addition to the full involvement of our 5,000 volunteers, Hellfest has now become an essential stop on the festival circuit for the biggest bands, and we are proud to bring significant economic, cultural, and touristic impact to our local Nantes wine region, supporting numerous local jobs and activities.

"The results speak for themselves: all 55,000 four-day passes for the 2025 edition were sold out in less than 20 minutes, just ten days after the end of the 2024 edition, and still without announcing a single band."

And in Italy, organisers of C2C Festival in Turin said this year attracted a record number of visitors. The 22nd event sold

41,000 tickets [up from 35,000 in 2023]. A record 33% of the audience came from 47 countries, according to organisers.

Taking place between 31 October and 3 November, C2C comprised 32 performances across five venues including Lingotto Fiere, OGR Torino, and Teatro Regio.

## The independents

While many of the biggest festivals are owned by the multinational companies, the independent sector remains a key part of the industry.

German heavy metal festival Summer Breeze had a record year, reports CEO and founder Achim Ostertag: "Overall, this year's edition was a great success. We were able to achieve sold-out status by April, which was a first for us in the current setup of having a capacity of 45,000 guests daily.

"The weather gods were in our favour; we were spared more than once when thunderstorms passed close to the festival site. The rest of the time, fans were blessed with sunshine. Production-wise, we had one major challenge to overcome, which was a major construction site situated on the only arrival route for attendees. We tried to solve the problem with a time-slot system to control the masses of

**"It's crucial to sell tickets right after a festival... If you wait, it's much harder. With the excitement fresh, people are eager to return"**

**Stephan Thanscheidt, FKP Scorpio**

arriving cars, which turned out to be effective, also thanks to the fans who stuck to the rules and correct time slots. If the experience for the fans is a good one, the festival runs smoothly, and the bands are happy with our hospitality."

In Czechia, Colours of Ostrava featured Sam Smith, James Blake, Tom Morello, and Khruangbin. Programmer Filip Košťálek says: "I'm very proud of our audience and the overall atmosphere of the festival. This edition showed us once again that our festival is about discovering new original music from all over the world, regardless of genre."

And in Romania, Electric Castle marked its tenth anniversary with Massive Attack, Bring Me The Horizon, Chase & Status, Sean Paul drawing an average 50,000 daily attendees (with a peak of 68,000 on Saturday) – a 20% increase from 2023's edition and a new record for the festival.

Stefan Elenkov at Fest Team in Bulgaria reports a "very rewarding season." "We saw a significant turnout across all our events, with our flagship festivals like Hills of Rock, Spice Music Festival, and the concert series *Sofia Solid* drawing huge crowds. The energy and enthusiasm from the audiences were truly inspiring, reaffirming our commitment to delivering top-notch experiences. I believe, more than ever, that through effective teamwork and open communication, we are able to adapt quickly, streamline our processes, and ultimately deliver successful events.

"We have learned the importance of flexibility and the value of maintaining strong relationships with our partners and sponsors, which proved essential in navigating any unexpected issues. Overall, this season has reinforced my

belief in our team's resilience and creativity, and I'm excited to apply these lessons as we plan for next year."

Ypsigrock in Sicily also reports a successful year, as Christoph Storbeck tells us: "We sold out all four days. The response from our loyal community and critics alike was overwhelmingly positive, strengthening our reputation as a unique, intimate experience in the festival scene.

"Yet, despite this success, we are not immune to the challenges that persist across the industry. Operationally, running Ypsigrock has become increasingly demanding, given our smaller, largely volunteer-based team. So we've made strides in improving volunteer training, such as through our European SMA! Small Festivals Accelerator Project." He says the festival is also focussing on generational renewal and on accessibility measures.

"By focusing on sustainability, fostering our team, and strengthening the connection with our audience, we believe Ypsigrock can continue to thrive, no matter the obstacles."

In the UK, Bloodstock had a record year, says Adam Gregory. "2024 was a huge success for us. The event sold out over the weekend itself. By Friday night, all weekend tickets were gone, which was fantastic. It was a brilliant event, and we tried something new this year – we announced 19 bands for the 2025 festival during the event, including all the main stage and second stage headliners, and it sold out very quickly. Your current festival is the loudest voice you have with your audience. Announcing the next year's lineup while fans are enjoying the event creates that FOMO. We sold more tickets on the 2024 weekend than ever before for the following year. Early-bird tickets, which usually last until mid-December, sold out in 36 hours; VIP tickets sold out in under two minutes; and campervan passes were gone in less than a minute."

Whilst in Belgium, Gent Jazz saw an increase of 15,000 people from last year – selling 57,000 tickets for acts such as Air, Nile Rodgers & Chic, and DJ Shadow.

Summerdays festival  
© Michael Dornbierer



## Challenges

But while there was plenty to celebrate in 2024, many festival organisers agree that this was one of the most challenging years they've faced.

Our European Festival Survey shows that the top three worries among promoters are booking artists (lack of availability, as well as high fees), rising production costs, and selling tickets. During a panel at the European Festival Summit, participants agreed these were their biggest issues.

As Cindy Castillo of Spain's Mad Cool Festival told the session: "It's not just production costs that have gone up – we had to invest double the money in marketing to sell the same amount of tickets."

Mikołaj Ziółkowski of independent Polish promoter Alter Art, which organises Open'er, said securing appropriate acts was a challenge because some artists are getting so much from headline shows at arenas and stadiums.

But there are solutions, as Bloodstock's Gregory says: "Ten years ago, agents thought we were mad for planning six

months ahead. Now, we're booking some bands two years in advance. It's not just us, though – bands and agents are now more open to this timeline.

"Covid forced a shift in how bookings are handled. Festivals had to rebook missed shows from the pandemic, so planning two years ahead became the norm. That hasn't reverted and competition has only intensified.

"We've also benefited from working with the United Festival Force (UFF), a network of seven European festivals held in late July and early August. Offering bands a tour circuit across Europe makes it easier to secure big names."

Nonetheless, some of the challenges facing promoters have proved insurmountable. In the UK, the number of festivals that postponed, cancelled, or closed in 2024 reached 74, according to AIF, while in the Netherlands, around 60 festivals closed, according to national press. Many events cited unpredictable ticket sales and a rise in production costs as their reasons for closing or postponing.

Provinci's Koivisto says despite a record attendance and a

Southside © Julius Hatt



very successful year in every aspect, one fundamental element didn't reflect the success: the financial results. "Despite the very good festival summer, the financial outcome does not look as good as it should after a very successful year," he reports. "It is clear that our main challenge is the very low profit margins of festivals these days."

FKP Scorpio's Thanscheidt also drew attention to this issue. As a board member of the German Promoters Association, Thanscheidt tells *IQ* that the majority of festivals in Germany – perhaps as many as 80% – struggled to turn a profit. "Most festivals are not even breaking even," he says, noting that many organisers are unwilling to reveal their financial difficulties for fear of damaging their brand image. Instead, they continue to hold out hope for brighter days ahead, although there is little clarity on when or how such improvements might materialise.

An example of such challenges was Goodlive's MELT, which announced in May that this year's event was its final edition. The decision was attributed to "insurmountable changes in the



Lynks perform at ESNS  
© Ben Houdijk



Behemoth perform  
at Summer Breeze Open Air

## "The biggest challenges for the coming years will be climate-related, requiring adaptation to increasingly difficult and unpredictable conditions"

**Eric Perrin, Hellfest**

festival landscape." The company also announced Full Force Festival would take a break in 2025, due to "several challenges [the organisers] cannot easily overcome."

Despite this, Thanscheidt notes that FKP Scorpio has largely succeeded in keeping its festival portfolio intact. However, he concedes that maintaining the financial viability of festival brands remains a difficult endeavour.

Oliver Vordemvenne, CEO of Nature One festival in Germany, says: "Due to the European Football Championships [and the] numerous stadium tours and new festivals entering the market, there was an oversupply of live entertainment events in Germany that could not be met by demand across the board. For many market participants, this led to a decline in ticket sales and even festival cancellations and insolvencies.

"At the same time, we are experiencing persistently high-cost pressure due to price increases in almost all trades and sometimes unrealistic fee demands from some artists."

## Weather

According to our survey, the fourth-biggest concern among festival organisers is extreme weather events. From torrential rain and thunderstorms to heatwaves and resulting forest fires, it seems things are getting worse.

Pohoda festival in Slovakia was cancelled on its second night after a thunderstorm caused a large tent stage to collapse and injure 29 people. Sets by acts such as Royal Blood, Morcheeba, Nia Archives, Black Pumas, Mount Kimbie, and Ezra Collective were unable to take place as a result. However, thanks in part to a fundraising campaign that raised over €140,000, plus fundraising concerts, organisers confirmed the event would continue in 2025. "We thank you for all the support you have shown us, whether it be through positive messages, tributes, concerts for Pohoda, donations, or other acts of solidarity," said festival organisers. "Each act of kindness and support has touched us deeply, and we receive them with heartfelt thanks. They give us the strength to begin preparations for Pohoda 2025."

In Germany, Nature One also contended with severe rain for the second year in a row, says Vordemvenne. "Frankly, we are pleased that 2024 will soon be coming to an end."

As Perrin from Hellfest says: "Looking ahead, the biggest challenges for the coming years will be climate-related, requiring adaptation to increasingly difficult and unpredictable conditions." He says the festival is adapting "by implementing roads, pathways, and infrastructures that facilitate the movement of festivalgoers, as well as the work of our technical teams.

"We are also committed to reducing the festival's environmental impact by helping our service providers develop new sustainable energy sources, encouraging festivalgoers to use eco-friendly transportation options to reach the festival."



# Mikko Niemelä

Promoter & co-owner – Ruisrock, Finland

## How was this summer's festival season for you?

This summer was the 53rd time Ruisrock took place, and it was another great success. We sold out all three days, with 35,000 visitors each day. Feedback from both our audience and artists has been extremely positive, and with everything going as planned, I'm very happy with how it turned out.

One of the highlights was a unique performance on our legendary Ranta Stage by Fröbelin Palikat. They've been making music just for children throughout their almost 40-year career, and this was their first show for an adult audience. What happened was incredible: 35,000 people singing, dancing, and playing to the songs they knew from childhood. It was truly a legendary, once-in-a-lifetime show, and we're proud it happened at Ruisrock.

Our negative issue this year was weather-related. There was a severe storm warning issued for Sunday of the festival. The winds were heavy, and we were already preparing to stop some of the shows on certain stages. But fortunately, the winds eased by evening, so we were able to keep the shows running by rescaling and removing some of the LED screens. It was a good test of our emergency protocols, which worked extremely smoothly.

## What challenges does the festival industry face?

The main challenge is keeping up with rising costs while maintaining a high-quality experience that keeps the business sustainable long-term. As production costs rise, customer expectations are also increasing. People are more cautious about spending on leisure, so festivals really need to ensure the ticket is worth every penny.

We work hard to make sure our entire experience offers value – from the amount of content we provide to the level of service and care we put into it. But it's essential to keep that balance and evolve with audience expectations if festivals are to stay relevant in the long run.

## What trends do you see shaping festivals in the future?

One trend is that the biggest headliners are becoming out of reach even for major festivals, as artists like Adele and Taylor Swift are focusing on exclusive headline shows where they control all aspects and revenue streams. This is pushing festivals to turn to newer emerging talent or nostalgia acts that still have the ability to attract large audiences.

Another trend is the use of technology, which I think we're only beginning to explore. Festivals remain a very live,

in-the-moment experience, but as the world shifts towards virtual platforms, that will impact festivals, too. What we see on stage and how the festival is experienced could look very different in the future, so we need to keep up with these changes to stay relevant.

And, increasingly, sustainability will be something people expect as a baseline. We have to understand the values of our audience and reflect them in our event planning and production. People might simply decide not to attend if they feel it's not aligned with what they believe is right.

## What steps are you taking for DEI (diversity, equity and inclusion) at Ruisrock?

Sustainability is one of our core values at Ruisrock, and we do a lot to make the festival as inclusive as possible on environmental, social, and economic fronts. Our main tool to ensure inclusivity is our Festival Etiquette – a straightforward list of what's okay and what's not – and everyone must agree to these rules when they buy a ticket. This makes it easier for attendees to call each other out if someone isn't following the guidelines.

We've also signed the Keychange pledge, programming a balanced 50/50 lineup for several years. For visitor diversity, we give free access to elderly fans over 70, and demand for these tickets is huge. Our island location can be challenging for attendees with special needs, so we work hard to make the site accessible, often with custom support to help them enjoy the festival fully.

## What role do festivals play in the cultural landscape?

Festivals have a huge role in providing a platform for different ideas and art forms, exposing people to things they might not experience otherwise. In a world that's increasingly polarised, I believe festivals play an important role in bringing people together who may not always share the same views.

With so many global issues, festivals have a responsibility to use their voice for good. We attract a lot of attention and have the chance to bring people together to think, connect, and even push for positive change. It's something I feel strongly about – we can and should use our influence to try and make things better.

# REPRESENTING 133 MEMBERS FROM 30 EUROPEAN COUNTRIES

## ALBANIA

South Outdoor Festival

## AUSTRIA

Electric Love Festival  
Frequency Festival  
Global Event Technologies  
Nova Rock  
Shutdown Festival  
Szene Open Air

## BELGIUM

Dour Festival  
Pukkelpop  
Rock Werchter

## BULGARIA

A to JazZ Festival  
Sofia Live Festival

## CROATIA

InMusic Festival

## CZECH REPUBLIC

Colours of Ostrava  
Rock for People

## DENMARK

Aarhus Festuge  
NorthSide Festival  
Roskilde Festival  
Smukfest

## FINLAND

Blockfest  
Flow Festival  
Ilosaarirock  
Porijazz  
Provinssi Festival  
Qstock Festival  
Ruisrock  
Sideways Festival  
Tuska Open Air  
Metal Festival

## FRANCE

Insane Festival  
Le Laba  
Le Printemps de Bourges  
Les Eurockéennes de Belfort  
Les Rencontres Trans  
Musicales de Rennes  
MaMA Music & Convention  
Peacock Society  
Rock en Seine  
We Love Green

## GERMANY

Das Fest  
Deichbrand Festival  
Feel Festival  
Full Force  
Future Of Festivals  
Haldern Pop Festival  
Happiness Festival  
HipHop Open  
Höme – Für Festivals  
Juicy Beats Festival  
Kessel Festival  
Maifeld Derby  
Melt Festival  
Nature One  
Parookaville  
Reeperbahn Festival  
Rocco del Schlacko  
Rock am Ring  
Splash! Festival  
Stadtpark Open Air  
Sóng 0 Berlin  
Summer Breeze Open Air  
Superbloom Festival  
Taubertal-Festival  
The Competence Network  
Wacken Open Air  
World Club Dome

## GREECE

Athens Rocks  
Rock Wave Festival

## HUNGARY

HOTS  
(Hungarian Oncoming Tunes)  
Művészetek Völgye – Valley of  
Arts Festival  
Sziget Festival

## ITALY

Arezzo Wave  
Comfort Festival  
Home Festival  
Ypsigrock Festival

## KOSOVO

Sunny Hill Festival

## LATVIA

Positivus Festival

## LITHUANIA

8 Festival

## LUXEMBOURG

Siren's Call

## NORTH MACEDONIA

Taksirat Festival

## NORWAY

Bergenfest  
by:Larm  
Øyafestivalen

## POLAND

Inside Seaside  
Kraków Live Festival  
Off Festival  
Open'er Festival  
Orange Warsaw Festival

## PORTUGAL

Boom Festival

## ROMANIA

Artmania  
Beach Please Festival  
Codru Festival  
Electric Castle  
Jazz in the Park  
Saga Festival  
Untold Festival

## SERBIA

Arsenal Fest  
Exit Festival  
Lovefest

## SLOVAKIA

Grape Festival  
Pohoda Festival

## SPAIN

Bilbao BBK Live  
FMA – Asociación de  
Festivales de Música  
Mad Cool  
Primavera Sound

## SWEDEN

Department Festival  
eps Scandinavia  
Malmöfestivalen  
The Production Office  
Way Out West

## SWITZERLAND

Baloise Session  
Festi'neuch Neuchâtel  
Greenfield Festival  
Gurtenfestival  
Heitere Open Air  
Montreux Jazz Festival  
Open Air Gampel  
OpenAir St. Gallen  
Paléo Festival  
Seaside Festival  
Stars in Town  
Summerdays Festival  
Venego Festival  
Winterthurer Musikfest-  
wochen  
Zermatt Unplugged

## THE NETHERLANDS

Down The Rabbit Hole  
Dynamo Metal Fest  
ESNS  
Lowlands Festival  
Movendum  
Pinkpop

## UK

A Greener Future  
Festival Pro  
ILMC

## UKRAINE

Atlas Festival

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# European Festival Survey 2024

The results are in from our annual survey of hundreds of festival organisers from across the continent.

**A**s EJ Encalade of New Orleans Jazz & Heritage Festival in the US told the European Festival Summit (EFS) in Karlsruhe in November: "We are at a paradigm shift in terms of festival economics, the type of workers we have, and the people who come. We have to be the disruptors, to find a way to strip down the model we [have] had for many years and go back to the meaning of why we're producing festivals."

This paradigm shift is typified by changing audience and staff demographics, new demands from festivalgoers, artists sometimes choosing to perform arena or stadium shows instead of festivals, higher fees, production cost inflation, and pressure to keep ticket prices affordable.

So, while 2022 was the year of the big return after Covid and 2023 was a year of consolidating gains, 2024 really felt

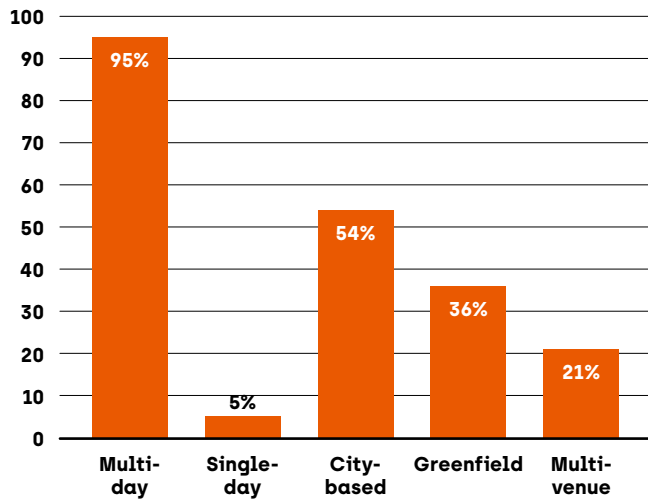
like the year this shift was experienced most keenly. What impact is it having on festivals, and how are they responding?

Since the return after the pandemic, we've been asking festival organisers to tell us how they're doing in an annual survey answered by promoters across Europe. Over the past three years, we've been tracking how ticket sales have been, the average prices for attending festivals, concerns, feelings about issues such as sustainability, and much more.

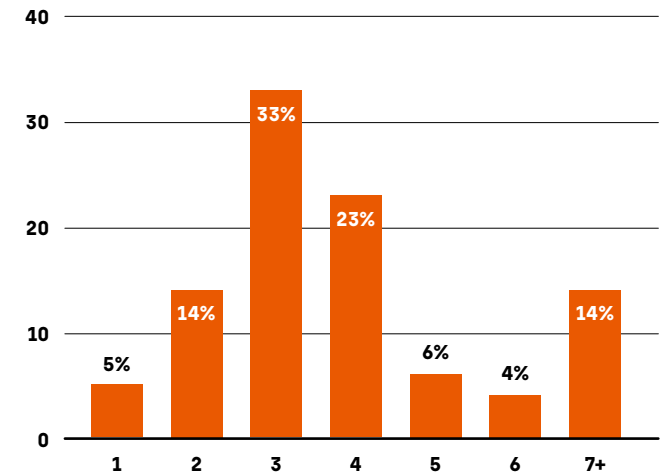
This year, 222 festivals responded to our survey. But who were the festivals that took part? Unsurprisingly, 95% described themselves as multi-day, with just a few taking place on a single day.

54% are city-based festivals, while 36% are on greenfield sites, while 21% take place in multiple venues.

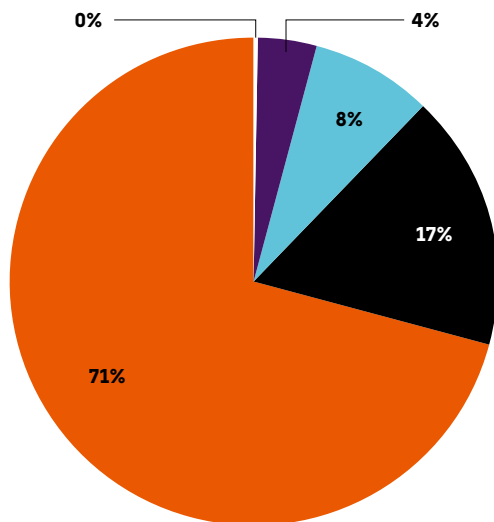
**01 Type of event**



**02 How many days does your event run for?**



**03 Which edition of your festival took place in 2024?**



The majority of festivals [33%] offer three days of entertainment, while 23% offered four days. Interestingly, 14% offered more than seven days of music.

As we saw in previous surveys, a majority of festivals [71%] that responded were more than 11 years old, highlighting that the established events with longstanding reputations appear to be navigating the changing landscape, while perhaps the younger, newer events aren't making it through these turbulent times. Just 17% were on their sixth to tenth edition and just a handful were on their second or third.

- 1st edition
- 2nd or 3rd edition
- 4th or 5th edition
- 6th to 10th edition
- 11+ editions



## Sizes of festival

The festivals that took part in the survey this year represent a broad range of capacities, spread fairly evenly. The largest proportion – 21% of those who took part – were between 5,001–10,000 capacity, while 16% were between 10,001–20,000 capacity.

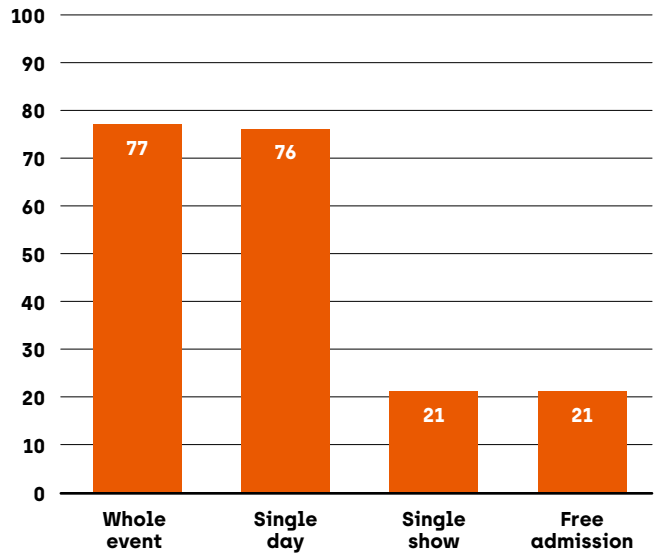
To explore the ways small, medium, and large festivals differ, we segmented some of our data by capacity. We considered small festivals to be 10,000 capacity or under (representing 45% of respondents); medium festivals between 10,001 and 30,000-capacity (30% of respondents); and large festivals are those events over 30,001-capacity (26%).

## Tickets

At a time when production costs and artist fees are rising faster than ever, the pressure to keep ticket prices affordable for audiences has never been greater. Margins are being squeezed like never before, as Mad Cool's Javier Arnáiz noted in *IQ* earlier this year. "Rising costs across the board, coupled with the need to keep ticket prices accessible, have required us to be very strategic in our planning and resource allocation," he said. "Our team is focused on finding efficiencies wherever possible without compromising the quality of the festival. To manage this, we are optimising our operations to maintain high standards without significantly raising ticket prices. This includes strategic partnerships and sponsorships that help offset costs, ensuring that we can continue to deliver a top-notch experience for our attendees."

When it comes to the types of ticket offered, getting your pricing strategy correct is critical. Our survey showed 172 festivals (77%) offered whole-event tickets, while 170 offered day tickets, demonstrating that there are multiple ways of attending festivals.

### 04 Types of ticket offered [%]



With huge pressure on production costs, what effect has this had on ticket prices?

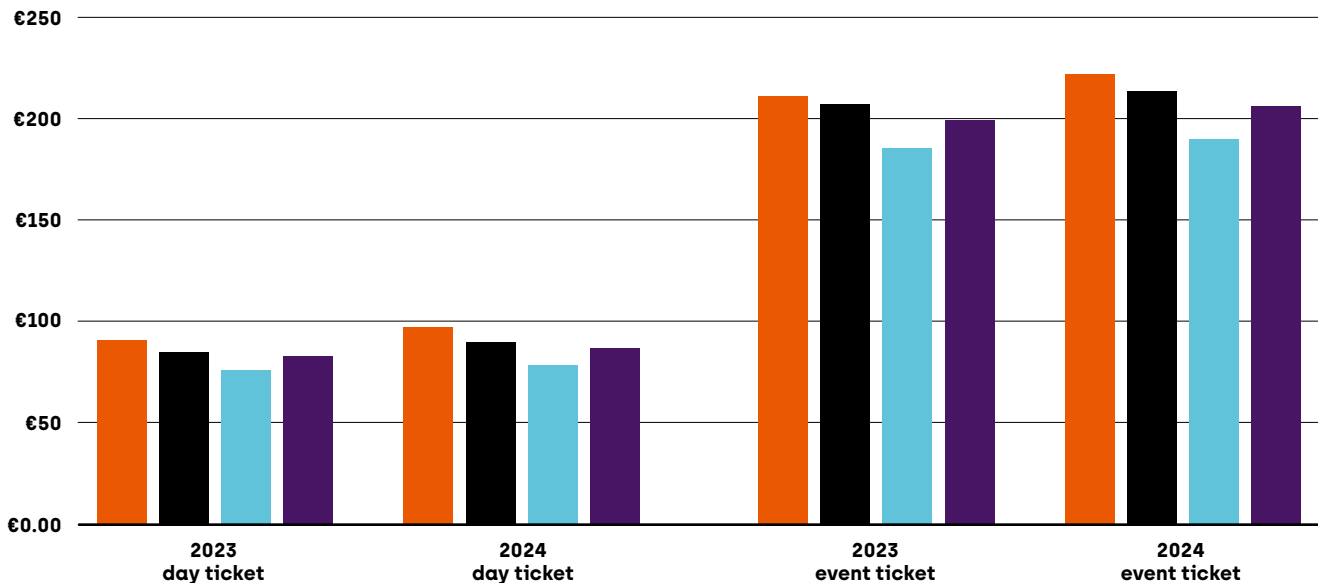
Looking across all festivals, the average ticket price for a whole-event ticket in 2024 was €206.17, which is 3.4% higher than the average whole-event ticket price in the previous year [€199.31].

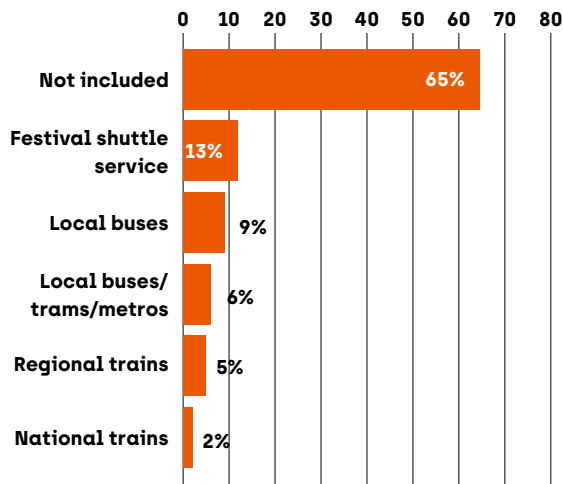
Average day-ticket prices in 2024 were up 5% on the previous year, from €82.88 in 2023 to €87.10 this year. This could reflect the fact that organisers are trying to keep their whole-event ticket prices down by charging a little more to people who only want to come for a single day.

Breaking this down by capacity, smaller festivals (10,000-

### 05 Ticket prices

■ Large (30,001 and over cap) 
 ■ Medium (10,001–30,000 cap) 
 ■ Small (up to 10,000 cap) 
 ■ All festivals



**06 Is transport included in ticket prices?**

cap and under) understandably have lower ticket prices – although not by much. Average whole-event tickets to these festivals were €189.96, up from €185.44 the previous year – a rise of 2.4%. Average day tickets increased 3.5% to €78.76.

For medium-sized festivals (10,001–30,000- capacity), the average ticket price rose 3% from €207.44 in 2023 to €213.69, and day tickets rose 5.6% from €85.22 to €89.97.

Anecdotally, it seems that more festivals than ever before are offering day tickets – even though others are reluctant to. Attending a festival for just one day, rather than a full event, instinctively feels at odds with many event concepts, which are designed around being submerged in the event for multiple days. Yet, as audiences prefer home comforts or a hotel over camping, demand for these tickets is higher than ever.

Reflecting the status of headliners that perform at large

festivals (over 30,001-capacity), as well as the huge operations behind them, ticket prices for the largest events were the highest of all.

Whole-event tickets cost on average €222.02 this year, up 5% from €211.23 the previous year. Day tickets rose 7% from €90.94 to €97.46.

Considering the number of artists performing across these events, this still represents excellent value for money, with day tickets costing on average significantly less than major stadium shows, with which one can make a fair comparison in terms of the level of artist performing.

We can see that, across the board, ticket prices rose broadly in line with the rate of inflation across Europe (rather than significantly above, which one might have expected with the rise in costs).

So how well did our festival respondents do when it came to ticket sales?

Across all festivals, 21% were fully sold out in 2024 – the same number as the year before, although this remains lower than 2022, which saw 29% of festivals sell out. This is to be expected, as 2022 was the first full year back after Covid-19, and demand for tickets after the lockdowns was exceptionally high. It's pleasing to note that 71% of festivals were over 80% sold, up from 64% the previous year.

Let's drill down into the figures and see how this panned out by festival size. Of the 104 small festivals that replied to our survey, 58% were 80% sold out or more, while just 13% sold out completely.

There were 65 medium festivals in our survey, and they tended to fare much better when it came to selling out – with 23% selling all their tickets and 78% who were 80% sold out or more (rounded to nearest whole number).

Some 56 festivals were over 30,001-capacity. These large festivals performed the best in terms of ticket sales, with 30% completely sold out and 82% selling over 80% of tickets.

## Key findings

**3.4%**

average  
ticket  
price

**3 DAYS**

the length of  
the majority of  
festivals (33%)

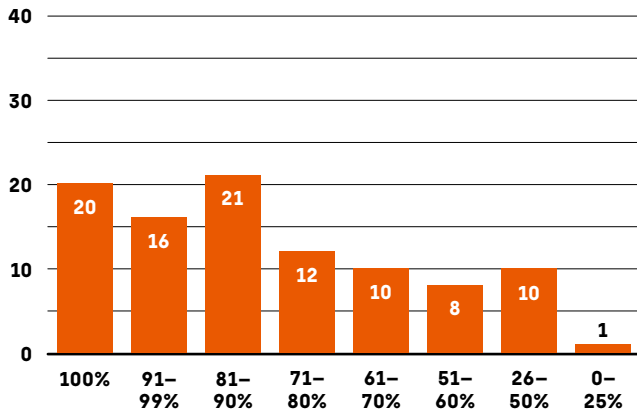
**48%** of festivals  
reported  
their sales were better  
than last year

**€206.17**  
average ticket price

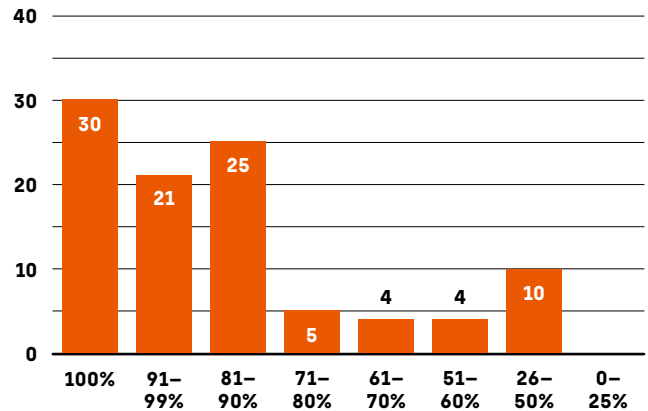
**20%**  
of all festivals were  
sold out

**07 How close to sold out was your festival? [%]**

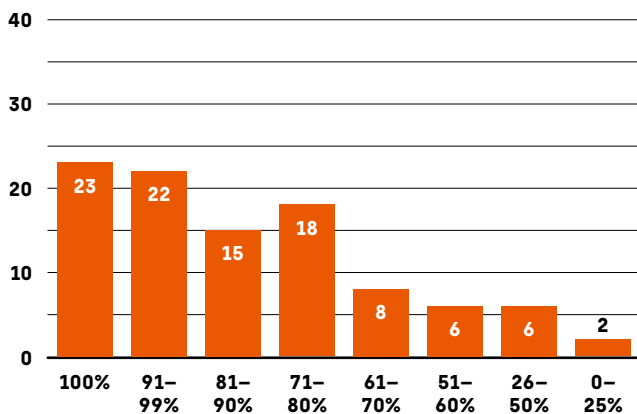
All festivals



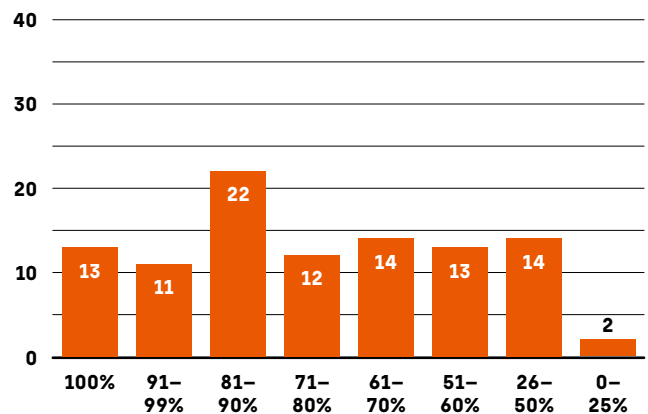
Large festivals (30,001+)



Medium festivals (10,001-30,000)



Small festivals (10,000 and under)



## Analysis

On average, 48% of festivals said their sales were much better or somewhat better than in 2023, while 26% said they were the same. 19% said their sales were a little worse than the previous year, and just 7% found their sales to be much worse than before.

But, if we break this down by capacity, our data shows that 46% of small festivals reported their sales to be somewhat or much better than 2023, while 21% said they were a little worse.

Among medium-sized festivals, 44% reported their sales as being somewhat or much better than the previous year, and 27% said they were the same as the previous year. 29% said sales were much or a little worse than in 2023. And for large festivals, 56% said they were much or somewhat better than the previous year and 23% said their sales were the same.

This could reflect a trend we are seeing in other parts of the live music industry of fans choosing to go to events featuring the biggest names while lesser-known acts struggle. With their megastar lineups, large festivals offer people

something of a safe bet, which at times of constrained spending gives ticket-buyers the security of knowing what they're getting for their money.

As CEO of Montreux Jazz Festival Media Ventures, Nick Bonard said in a recent article: "Putting on a festival is costing more and more money, and recent events have driven costs up further across the board. Financial constraints mean people are more selective about which festivals they attend, often limiting their participation to one or two events per year.

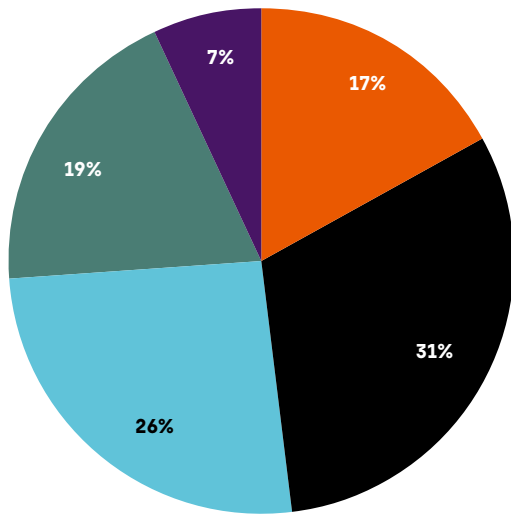
"This shift in consumer behaviour has made the market more competitive. Consumers are spending on either the higher end or the lower end, and everything in the middle is suffering."

Festivals continue to attract people across national borders, and 64% of festivals saw up to 10% of their audience coming from outside their own country. Some 21% said they saw an increase in the number of people coming from other countries to visit their festival. While this is still an increase, last year, more festivals saw a rise in foreign guests.

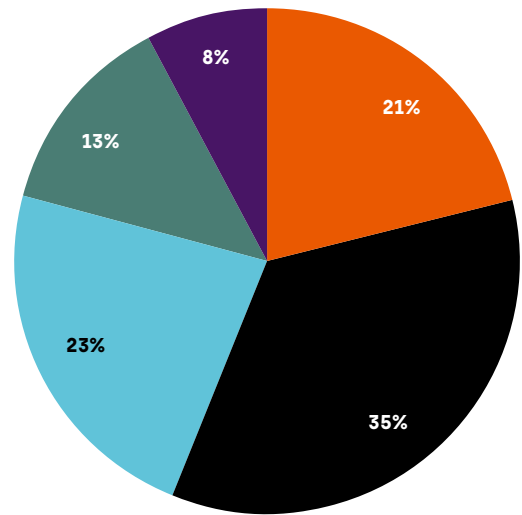
**08 How did your sales compare to last year?**

■ Much better 
 ■ Somewhat better 
 ■ Same 
 ■ A little worse 
 ■ Much worse

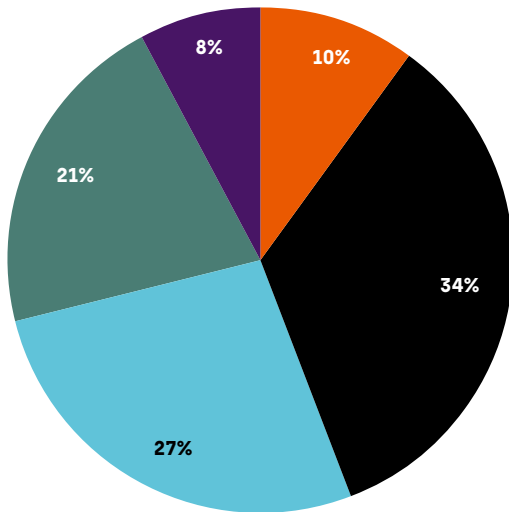
All festivals



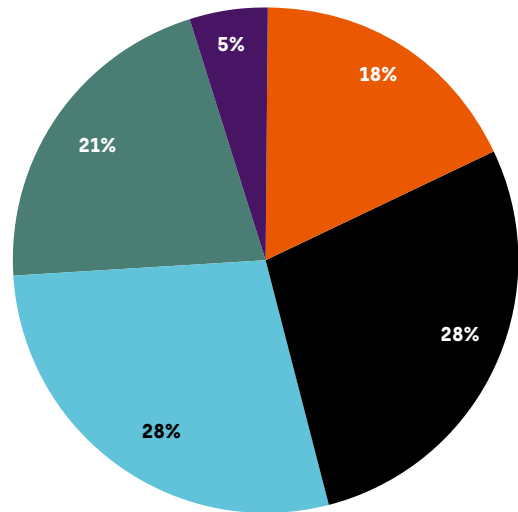
Large festivals (30,001+)



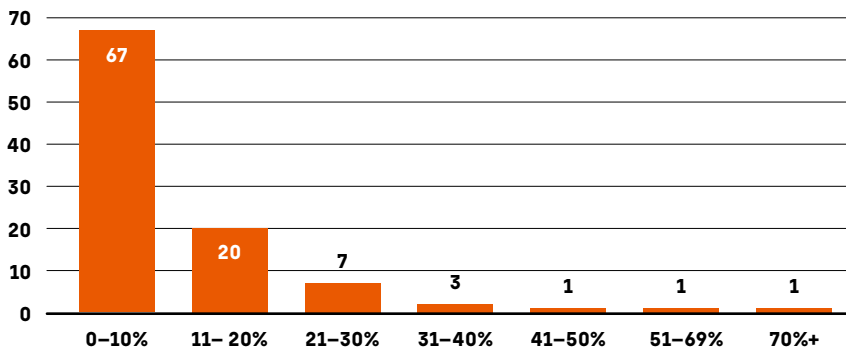
Medium festivals (10,001–30,000)



Small festivals (10,000 and under)



**09 What proportion of your audience is from abroad?**



## Challenges

Encalarde's succinct summing up of the challenges facing festivals in 2024 shows this is a time of significant change, requiring existential questions to be asked that will enable festivals to transition into this new era. So what was keeping festival organisers awake in 2024?

According to our survey, the three main concerns were rising production costs (71% cited this as a key concern), booking artists (49%), and selling tickets (35%).

At EFS, Gadget Entertainment festival director Christof Huber said that he used to book big acts like Muse and Depeche Mode for his events. He told delegates: "I think these times are over for us," because the fees for that level of artist have become unaffordable. Instead, he's now targeting acts that are more affordable – in particular, mainland European acts, as UK and US artists are often too expensive and/or unavailable.

Alter Art CEO Mikołaj Ziółkowski, who's behind major Polish festival Open'er, agreed. He said that because artists are getting so much from headline stadium and arena shows – and that the pricey tickets are dominating people's leisure spend – festivals are having to compete. "One of our biggest challenges is that it seems Gen Z likes stadium shows more than festivals, because they like the comforts available at concerts. But we're also facing the fact that most of the big acts want to do shows with huge production, and often festivals can't accommodate that. Plus, artists at headliner level want to have control over their own show, make more money, and have their own audience in front of them."

Indeed, at IFF in London in September, agent Matt Bates of Primary Talent International said: "When you're a huge artist nowadays, there's a tendency to do your own thing, rather than performing at a festival, which would've been the norm ten to



Frankie Stew & Harvey Gunn at Maifeld Derby © Florian Trykowski

15 years ago."

What could give some comfort to promoters looking at their artist budget with trepidation is that according to a survey of over 7,000 fans carried out by festival platform Höme and YOUROPE (see full report on page 44), people prefer atmosphere over headliners. Some 85% said this was their primary reason for going to a festival, while 54% said that headliners were the main reason.

The fourth-biggest concern among festival organisers was weather. The increasing frequency of extreme events, such as the microburst that hit Slovakia's Pohoda festival this year, means this is very much at the front of people's minds.

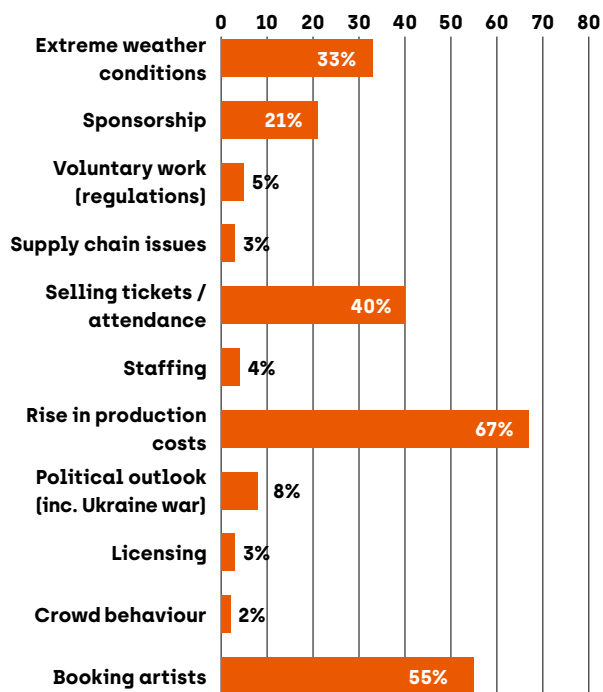
Looking at how concerns for festivals have changed over time, we can see that issues such as the political climate, staffing, and supply chain issues were less of a worry in 2024. Political issues were a key concern for 27% of people in 2022, 36% in 2023, and just 8% this year, while staffing was the main concern for 74% in 2022, 46% last year, and 4% in 2024. This reflects the major challenges faced by festivals immediately after the pandemic, when thousands of experienced professionals left the industry, resulting in a staffing crisis. However, as we can see, this has improved over time, as more people entered the business. Equally, supply chain issues were a concern for 55% immediately after Covid, 41% in 2023, and 3% in 2024, mirroring the improvement in this situation over time.

## Tackling challenges

When it comes to overcoming challenges, just under half of events (46%) made changes this year. Many festivals sought to enhance their offerings by increasing capacity or introducing additional stages. One added a dedicated electronic music stage, catering to a younger demographic and attracting new sponsors. Another added an extra day.

On the flipside, some festivals had to make difficult cutbacks. For instance, one reduced the number of headline acts, opting for regional talent instead. By doing so, they not only lowered artist fees but also appealed to local audiences.

### 11 What do you think will be your biggest challenges in 2025?





Another festival removed its late-night programming to save on staffing and energy costs, with organisers noting that this change surprisingly did not affect overall satisfaction scores.

Quite a few events reduced the number of days from three to two in order to reduce costs, although others decided to invest in more programming and additional stages. Many festivals said they proactively sought to book more of a gender-balanced lineup.

When it comes to next year, fewer festivals (42%) said they planned to make changes. While many said the exact nature of these changes would depend on the situation in 2025, those that had specific plans included shifting programming focus to appeal to broader or more diverse audiences, such as expanding genres from niche styles to more mainstream music to drive ticket sales; introducing new ticketing models, such as discounted youth tickets to attract younger audiences; and plans to add stages or improve stage layouts for a better audience experience.

It's interesting to note that staffing levels are not currently causing headaches. Unlike in 2022, when 53% said they were short-staffed, this year, just 4% cited this as something they were worried about. Unlike in the year immediately after the pandemic, when events struggled to find enough people to work, that now seems to have levelled out, and we're pretty much back to pre-pandemic levels.

And when it comes to the make-up of teams, respondents told us they averaged 49% female-identifying staff, 48.5% male-identifying, and almost 4% non-binary people. Some 40% of festivals have policies to encourage a more diverse workforce.

Volunteers are the lifeblood of many festivals, with 76% saying they are able to engage such workers. Volunteers often exchange their time for free festival passes, making it an attractive option for many people.

However, 24% of festivals are not allowed to have volunteers on-site – a significant number when you consider the cost of staffing.

When it comes to the environment, 77% of festivals said they plan to become climate neutral in the future.

## Artists & agencies

Earlier this year, music business directory and data platform ROSTR analysed the lineups of 50 top European festivals for *IQ Magazine*. They found that 4,900 artists performed at those 50 festivals – but that even more men topped festival bills this year than in 2023. In total, 92% of the acts that were onstage during a headline slot were male, along with 78% of solo headline acts.

While this could be down in part to the biggest female artists choosing to perform solo shows at arenas and stadiums, it's clear that more still needs to be done to balance bills. "There's still a lot of big female artists out there, but rather than playing at festivals, they're staging their own outdoor shows," said Bates, who added the trend was not exclusive to female performers.

ROSTR's analysis found that the average age of headliners was 42, although headliners aged 20–40 account for the vast majority of performances.

In terms of longevity, 53% of headliners had been active for less than 20 years.





# Chokri Mahassine

Promoter – Pukkelpop, Belgium

## How was the festival season 2024 for you and Pukkelpop?

This year was a special one! Our combi-tickets (for the whole weekend) were sold out in 48 hours. Never in our history has this happened so fast. This led to a further rush on day tickets. We were used to spending months building a beautiful and well thought out promotional campaign, but suddenly, we were technically out of work – figuratively speaking.

Something I hadn't considered was that communication about the festival and the lineup would disappoint people who weren't able to secure a ticket, instead of making those that did get one happy. Adjusting our communication to this conflict of interest was an interesting learning process.

The festival days were some of the best we've ever had: the energy of the crowd was amazing, the atmosphere was fantastic, the weather was good, and the lineup, with Fred again.., Sam Smith, and Charlotte de Witte, was nearly perfect. It's always great to see people of all ages coming to Pukkelpop to enjoy music, culture, and adventure together. Next year marks our 40th anniversary, and of course, we're going to make something special out of that, too.

## What are some of the challenges you face as a festival organisation, and how do you try to address them?

Increasing costs, artist fees, production costs, and employment costs remain a major issue in our scene. Additionally, you have to keep evolving in terms of mobility, safety, and impact on the local community. First of all, we try to work more efficiently and to form strategic partnerships. We also frequently consult with other Belgian [competitor-colleagues] both large and small.

In addition, we continue to programme new and emerging artists to offer an adventurous lineup without being entirely dependent on the most expensive headliners. However, even starting bands nowadays cost a fortune. It's a delicate balance, especially since this directly affects ticket prices.

## What measures are you taking to promote sustainability at Pukkelpop, and why is this important to you?

Sustainability is embedded in Pukkelpop's DNA. For years, we've been working on initiatives such as reducing waste and using green energy. This year, we became the first major festival in Belgium to run all generators, forklifts, and site buggies entirely on Blue Diesel 100. We introduced a new project focused on recycling party tents, and for many years, public transportation has been included in our tickets. This is

something we are fully committed to.

As a festival, we want to have a positive impact not only on our visitors but also on the environment and the local community. Festivals have a responsibility to raise awareness and encourage sustainable choices. It's essential that we take the lead and continue investing in sustainability.

## What role do you think festivals play in the cultural landscape of Europe?

Festivals are more than just places to experience music; they are meeting points for different cultures, generations, and beliefs. Pukkelpop has always aimed for diversity and inclusivity, both on stage and in the audience. We want to inspire and connect people, and we try to do this by providing a diverse lineup that goes beyond just music. There is no shortage of good food and drinks; Pukkelpop is also a culinary experience. The cultural and economic impact of festivals is significant, and we are happy to contribute to strengthening that cultural dynamic in Belgium and in Europe.

## What are the biggest changes you have observed in the festival world since the pandemic?

The pandemic has shocked the industry into action. There has been a shift in the behaviour of the audience: people, especially the younger generation, have become more selective about the events they attend. They want value for their money and are looking for unique experiences. For us, this means that we must remain creative and keep innovative, in terms of experience, sustainability, and of course regarding the lineup.

## What trends do you think will be decisive for festivals in the coming years?

I see a further integration of technology into the festival experience, such as AI, augmented reality, and interactive elements that make the experience even more intense. Additionally, sustainability will be more important. Festivals that do not evolve will face difficulties. The focus on health and safety remains important; people want to feel safe at an event, and we should take care of that. Pukkelpop consolidates all support related to well-being and safety in a separate zone. We are available day and night for festivalgoers, crew, and artists. Finally, I believe that festivals will focus on inclusivity and diversity, both in the lineup and the audience.



# Sustainability inspiration

**Discover some of the innovative sustainability initiatives being undertaken by festivals across Europe that can be applied to your events.**

By Katharina Weber

## Tents, Towels & Deposits at Green Sziget

**Hungary's 90,000-capacity Sziget Festival introduced a number of new measures to its sustainability programme, Green Sziget, this year, including towel recycling, water points, tent registration, and catering. The main challenge, however, turned out to be the new country-wide bottle deposit system.**

In Hungary, each glass bottle now includes a deposit of 50 forint (€0.12), which is refunded when the bottle is returned to designated machines. "We wanted to get some machines to the island, but due to technical issues, we could not," reports Dóra Diószeghy from Sziget's sustainability team. So, instead of the festival attendees, the bars and caterers were obliged to pay the deposits, with Sziget providing mobile return machines for them, meaning they were responsible for collecting their own bottles. "The bottles ended up in bins and were supposed to be collected by us. Even though we collected most, we couldn't sort them properly. In total, we [did manage to return] more

than 180,000 bottles," says Diószeghy.

The festival also launched various backstage initiatives, including the collection of towels for reuse and the provision of water points to encourage people to bring their own refillable water bottles. Half of the towels were successfully collected for reuse, and the team received great feedback regarding their efforts to reduce plastic bottles, according to Diószeghy.

Another scheme put in place was a tent registration system, in which campers were offered a financial incentive to take their tents home after the festival. "If they registered their tent and could prove that they had taken it home, they received a €20 coupon for next year's festival," Diószeghy explains. Unfortunately, although there was a high number of registrations, there was a lower redemption rate. "A positive incentive might not be the way to go when it comes to camping waste, and we are currently mapping the options to move forward from this," she concludes.

Catering-wise, Sziget helped raised awareness around sustainable eating and encouraged food vendors to comply with baseline measures such as providing vegetarian/vegan options, reducing red meat, and using locally sourced ingredients.

"We piloted a system in 2023 that included seven possible measures. We incentivised complying with at least three measures. Most caterers complied with three in the first year. Instead of making it compulsory, we decreased the number of options to five and made the measures more ambitious. This year, 82% choose to comply with three measures," Diószeghy says.

Her advice for festivals that want to become more sustainable but don't know where to start is to designate a dedicated sustainability staff member who can pinpoint which areas of your event require action and look for alternative solutions.



## Huge leap forward for sustainable events blueprint

**In their first show in five years, Massive Attack's goal was to have the lowest carbon footprint of any concert of its size and successfully set new standards for sustainable production. The all-day event, known as Act 1.5, was held at Clifton Downs in the band's home city of Bristol, UK, on 25 August and was 100% powered by renewable energies and batteries.**

Non-profit organisation A Greener Future (AGF) was responsible for advanced planning; on-site sustainability management and coordination; and post-event analysis and reporting for the 35,000-capacity event.

"This show has really pushed the boundaries and shown what is possible in events at scale," says AGF co-founder Claire O'Neill, who has worked on sustainability in live events for 20 years.

### Measures implemented at the event include:

- New energy solutions provided by Ecotricity x Grid Faeries, Power Logistics, Instagrid, and Zenobé.
- 100% plant-based food and local traders.
- Composting of all food and non-reusable serveware by Envar Composting.
- Compost toilets – courtesy of Compoost.
- Female urinals and harnessing phosphates by Peequal.
- Additional trains organised with Great Western Railway.
- Free electric audience shuttle buses provided by Zenobé.
- Electric ground transport provided by Crawfords and Volta Trucks (for equipment).
- Trucks fuelled by hydrotreated vegetable oil (HVO) by KB Event.
- A green volunteer team – courtesy of My Cause.

"A huge amount of work has gone into the greening of the live sector over time, albeit often isolated or on the fringes, without becoming the norm," says O'Neill. "I've never seen the entire main stage of a 35,000-cap event depend on a battery, which is solely powered by the wind and the sun, and with no diesel back-up, with a 100% vegan menu, and extra trains and free EV buses organised for the audience," says O'Neill.

Act 1.5 was the manifestation of a carbon emissions report commissioned by Massive Attack and conducted by scientists at the University of Manchester's Tyndall Centre for Climate Change Research. The event's findings will be used to develop blueprints for the live music industry, so that live events can stay within the 1.5°C limit of temperature change that was specified in the 2015 Paris Agreement.

O'Neill says the concert was viable thanks to cross-sector collaboration – particularly regarding travel, which the report found to be "the single largest contributor to an outdoor event's carbon footprint."

To reduce this, Great Western Railway ran commissioned trains, and Zenobé provided eight fully electric double-decker buses. All vehicles used for transporting batteries and recharging were either fully electric or powered by compressed natural gas. When electric trucking and tour buses weren't available, suppliers were encouraged to use fuels that were certified or fuelled by certified waste product HVO.

O'Neill hopes that Act 1.5 is the beginning of a new chapter and that the "bigger players in the industry" support this transformation. "There's a real fear of stepping away from business as usual – especially when there's a perceived risk," she explains. "There is often a resistance to change, but what was lovely to see with Act 1.5 is that people who were sceptical at the start came on board by the end and were excited to be a part of something that has a positive impact and worked."



© Bertrand Pasche

## Paléo invests in reusable tableware

**Switzerland's Paléo Festival Nyon invested in 100,000 reusable plates and 40,000 reusable bowls for its 2024 edition. The six-day event with a daily capacity of 50,000 had a lot of mouths to feed. This complements the event's 1m reusable cups that it has been using since 2009.**

Attendees pay a €2 returnable deposit on each reusable item, with the unbranded tableware helping to reduce the festival's carbon footprint.

In addition, a partner company rents out the tableware to other events as part of a circularity strategy aimed at accelerating the deployment of reusable solutions. Another partner company, located just 70 km away, takes care of washing and storing the tableware between events.

The initiative has been backed by the Swiss Cantonal Office for Sustainability and Climate.



The 1975 perform the first-ever carbon-removed gig at The O2 © Luke Dyson

## What festivals can learn from The 1975's carbon-removed shows

**One of the best learning opportunities for festival organisers this year was the series of carbon-removed shows by The 1975 at London's The O2, which saw all those involved reduce the carbon footprint of the venue and shows as much as possible, and the removal of the remaining emissions from the atmosphere to reach net-zero.**

The band's four shows, on 12 and 13 February, were the world's first carbon-removed arena gigs. The AEG Europe-owned venue received help from carbon removal experts CUR8 and sustainable event specialists A Greener Future (AGF), who also awarded the venue with the first-ever Greener Arena certification.

"The purpose of those shows was to address the yawning gap between what is currently possible in the world of sustainability and where we need to get to in the future – perfectly zero-carbon events," says Sam Booth, director of sustainability at AEG Europe.

"But we're a long way off, and while we can continue reducing our emissions, we need to figure out what the stop gap is going to be. According to all the science, we need to upscale carbon removal technologies. They draw carbon dioxide out of the atmosphere and store it durably out of harm's way."

With the help of AGF, The O2 calculated how much carbon each element of the show would produce. The resulting 136.46 tonnes of CO2 per show, or 545,84 tonnes for all four shows, were eliminated by paying carbon removal projects to extract that amount elsewhere in the world and safely store it.

An expensive task but spreading the costs across all those

responsible for the emissions produced made it manageable. "The O2 paid for the emissions that came from our role, such as the energy we use to power the lights, the heating, the waste management, the water, and so on. Our catering partner paid for everything that was as a result of what happened at the bars and in catering. And then the band looked after everything that happened that was under their control: the trucks, the merchandise, and so on," Booth explained.

The audience was asked to chip in as well – only fair, considering audience travel caused about three quarters of the shows' emissions. These were covered by a combination of venue investment and a 90p contribution from fans that was incorporated into the original ticket price.

Since there is a real risk of falling for greenwashing when it comes to carbon-removal, The O2 relied on a portfolio of scientifically verifiable methods including rock weathering – accelerating natural weathering by speeding up chemical reactions between rocks, water, and air, thereby storing carbon in minerals – and biochar.

It is important to note that AEG had already worked hard on reducing the environmental impacts of The O2 by switching to renewable energies; investing in energy-efficient LED lighting and screens; developing a carbon-reduced food menu and offering 100% biodegradable serveware; and installing an on-site biodigester and reusable cup and washing system.

"With the success of this world-first pilot series of arena events, we've proven that it's possible to run an arena-size live show that doesn't compromise on a great fan experience but still accounts for the impact it has on the environment," Booth concludes. AEG offers the scheme to all incoming promoters at The O2 and wants to launch similar events at other venues.

## The Birds & The Trees & Øya Festival

Norway's Øya Festival kept things simple when choosing "nature" as an environmental theme in 2024. According to the promoter, the goal was to refocus on the reason why the festival has been championing sustainable production measures for years: "It is about protecting and restoring nature so that it survives, lives, and maintains critical ecosystems," the promoter explains.

"Although we are a small festival, it is important for us to look up a little and remind ourselves of what it is we are really trying to save in this terrifying and dangerous climate crisis. By protecting nature, we create liveable conditions for ourselves." This ambition resulted in several collaborations at the festival this year.

Together with Oslo's Natural History Museum, which is located in the same park as Øya Festival and was the event's main environmental partner for 2024, they created a project called "give space to the sound of nature."

With the help of researchers at the museum, the festival selected five endangered birds, which were featured around the museum and festival site. Every day, before the first act came to the main stage, birdsong was played alongside visuals.

Being located in Tøyenparken, Øya Festival also pays close attention to protecting the trees at their site. In 2024, together with tree specialists at Trekontoret (The Tree Office), they selected some of the most iconic trees in the park to communicate the importance of trees to the general public. This included daily guided tours of the trees during the festival.

The festival also stopped offering meat as a result of a years-long reduction of meat on the menu (fish and dairy are still available). "We are not that keen on labelling everything we do, so have avoided advertising vegetarian or plant-based [on those dishes that are] – but we talk a lot about local and sustainable food and try to showcase really tasty, local, and sustainable food presented by restaurants from the area," says the event's CEO Tonje Kaada.

## Mojo Festivals push campsite recycling

**According to Netherlands-based Mojo Concerts, 400,000 kg of waste is left behind at the camping grounds of their festivals, Pinkpop, Down the Rabbit Hole, and Lowlands, each year. Broken and/or discarded camping gear, including tents, air mattresses, sleeping bags, and discarded plastic packaging, usually end up in an incinerator. To combat this, Mojo has launched a campaign aimed at creating zero-waste events by 2030.**

Mojo is asking campers at its festivals to reduce the amount of stuff they bring, especially single-use items, to reuse or donate equipment, and to recycle their waste.

Mojo handed out recycling kits, which included waste bags and information on waste sorting, to campers upon arrival. Recycling zones were set up, where campers could drop off separated waste bags and broken camping gear.

In total, 145,000 campers were encouraged to take home camping gear and help with waste separation. The result was that almost no camping gear was left behind at either Pinkpop or Down the Rabbit Hole.

## Scope X: your festival's handprint

**Louise Lindén, founder of Swedish festival and change agency LiveGreen and CEO of Great Fkn Ideas, teaches people to harness the power of music for creative change.**

Lindén's focus is on getting people to truly understand the climate crisis, from both an intellectual and emotional point of view, and encouraging them to take responsibility. To do this, she uses the concept of Scope X, extending the Greenhouse Gas Protocol's Scope 1-3 for measuring greenhouse gas emissions.

"While Scopes 1, 2, and 3 define the direct and indirect footprint of an event, Scope X defines the handprint – the influence we have on visitors, partners, communities, and our systems," Lindén explains. "The culture industry has an important role in the transition to a sustainable, just, and resilient society. Festivals and events are meeting places that unite and inspire a diversity of people. Research shows that when people visit events, they are more open-minded and curious than usual and more inclined to change traditional behaviours and norms."

In 2012, Sweden's Way Out West festival made the decision to offer 100% vegetarian catering. Whilst this decision initially angered some commentators, including right-wing politicians and tabloids, the festival was still a success and protests grew weaker each year. Today, vegetarian events are no longer considered radical in Sweden. "But that's the thing with radical ideas – they're only radical the first time and then become normal over time," Lindén says. According to a study, 15% of Way Out West's attendees have since changed their diet to eat solely or more vegetarian food.

Elsewhere, Sweden Rock implemented a "sustainable hard rock" campaign, creating a proprietary organic beer especially for the event's beer-swilling audience, whilst green innovations were showcased at the festival to raise interest in sustainability.

One of the reasons people resist climate action is related to identity – "I want my meat and my car," says Lindén. The events we attend often closely represent our identity, which means that they can also be employed to challenge our prejudices and help us overcome things like climate denial and scepticism that hold us back. "There are no non-radical futures. No matter how we act today, the future will be radically different," she says.

"Events are temporary cities that reflect society, which means that they can be playgrounds for radical imagination, innovation, and transformation. We can be the thought leaders of the future," she adds.

Several festivals are already doing this, such as Roskilde Festival [DK] with its recurring Utopia theme, and Rosendal Garden Party [SE], where artists are encouraged to help punters envision a positive future.

# There's no climate justice without disabled people

**Suzanne Bull**, founder of access charity Attitude is Everything, shares a powerful reminder to include disabled people when designing sustainability policies.

**A**s festivals increasingly become more sustainable, it's vital that disabled people are part of the picture. For me, there's no climate justice without disability justice. Disabled people need to be included in the conversations about sustainability from the very beginning, because when it comes to festivals, there's no one-size-fits-all approach.

Sustainability policies, no matter how well-intentioned, can unconsciously exclude disabled people if their needs aren't factored in from the start. Ensuring your event's environmental goals are inclusive is not just about accommodation; it's a necessity for creating a truly accessible, welcoming, and just space.

Consider the impact of sustainable practices on disabled attendees. Many common eco-friendly policies – such as promoting public transport, banning plastic, or limiting on-site vehicle access – can inadvertently create barriers. For instance, while encouraging public transportation can reduce emissions, many disabled people rely on private, accessible vehicles due to limited accessible public transit. Blanket bans on plastic often ignore the fact that some disabled people need single-use items like plastic straws and certain medical supplies that have no sustainable alternatives. Rather than viewing these needs as obstacles, festival organisers should see them as opportunities to innovate sustainable practices that include everyone.

Accessibility within eco-friendly initiatives is possible with a few adjustments and thoughtful planning. Cheltenham Festivals, in the UK, has created an accessible facilities "bank," allowing local events to share resources like accessible toilets, ramps, and other necessary equipment. By sharing resources, festivals reduce the environmental impact of sourcing and shipping new materials, while also ensuring these resources are readily available for disabled attendees.

To reduce plastic waste, many festivals now rely on water refill stations, but these are often positioned at heights that wheelchair users or people with limited reach can't easily access. Providing refill stations at multiple heights and in accessible locations ensures that all guests can stay hydrated without needing single-use plastic bottles. Similarly, waste disposal can be designed with disabled attendees in mind. Adding recycling bins, compost bins, and water refill

stations to viewing platforms or accessible camping sites means these areas remain inclusive and eco-friendly.

Accessible transportation options are also critical. While shuttle buses are eco-friendly for many attendees, accessible green transport is often limited, making it difficult for some disabled people to reach the event or move around the festival grounds. Investing in electric or hybrid shuttles with wheelchair access or allowing limited private vehicle access for those with mobility needs, can bridge this gap.

Food and drink options are another area where festivals can embrace inclusive sustainability. As more events shift towards plant-based and zero-waste dining, it's important to remember that some disabled attendees have dietary needs that may not align with these options. Offering a range of food that includes items for people with sensory sensitivities or specific nutritional needs ensures that everyone can find something suitable without feeling excluded. This inclusivity can extend to menu design – menus should be available in large print or in digital formats to improve accessibility for those with visual impairments.

Finally, clear and practical communication about sustainability policies is essential. Many disabled attendees have reported that sustainability information is often vague, heavy on jargon, and leaves them uncertain about what to expect. Transparent and accessible messaging – such as a dedicated section on your website detailing sustainable practices in clear, inclusive language – empowers all guests to make informed decisions. Be upfront about your venue's accessibility, including details like the terrain, availability of accessible bathrooms, and options for mobility device charging.

Understanding how disabled people feel about how welcoming your event is can be very simple – just ask them! Disabled people are often the most aware of areas that could benefit from adaptation or improvement, and their insights can guide you toward more inclusive practices.

By creating sustainability policies that prioritise inclusivity, together we can ensure that festivals are welcoming to all *and* truly sustainable. Ultimately, disability justice is climate justice.



# Diversity, equity & inclusion

## Making festivals a welcome place for everyone

From diverse lineups to accessibility efforts, discover the initiatives helping European festivals become places where everyone belongs.

**F**estivals are places where people can come together; feel united by music and a sense of community; and share experiences. But are they truly places where everyone, regardless of background or abilities, can participate and feel valued?

Earlier this year, festival platform Höme and European festival association YOUROPE surveyed more than 7,000 festivalgoers about their experiences. More than 4,600 said they feel safe and unrestrained by others at such events, with only 7% reporting that they feel “somewhat insecure” on site.

As Höme co-founder Isabel Roudsarabi says in her report on page 44: “Much of this sense of security seems to stem from the safety and social responsibility measures that festivals have put in place, which should clearly remain a priority going forward. In recent years, we’ve seen a wide range of initiatives, from on-site mental health and “psy-care” teams [support for attendees struggling with drug-related issues] to emergency helplines, codewords at bars, good lighting along dark camping paths, and clear communication on antidiscrimination and inclusion. These efforts appear to be making a difference, with 68% of visitors saying these measures make them feel safer than they would without them.”

However, the situation for disabled people isn’t as rosy. The fan survey showed that of the 920 disabled or neurodivergent people who responded, just 15% were happy with access provisions.

There are a number of initiatives, which – depending on where you are in Europe – fall under different names, including awareness, inclusivity, DEI (diversity, equity, and inclusion), and more. But whatever you call these efforts, “Awareness isn’t just a programme; it’s a holistic approach,” says Sarah Saem Bergmann, co-founder of Germany-based Act Aware, an organisation dedicated to fostering inclusivity in festival spaces. “We work with festival organisers to help create safe,



non-discriminatory spaces that make everyone feel welcome and comfortable.”

Founded in 2020, Act Aware’s aims to promote awareness in the event industry. Its approach incorporates understanding social structures and power dynamics, empowering festival teams, artists, and attendees to coexist respectfully.

The organisation’s work includes partnering with festivals of various genres and sizes, from Wacken Open Air to the techno-focused Habitat Festival and mainstream events like MS Dockville. Bergmann says that inclusivity extends far beyond addressing incidents. “Awareness is about prevention,” she says. “We train teams, implement codes of conduct, and establish clear consequences for boundary crossings.”

The demand for Act Aware’s services has surged in recent years. “We’ve seen a noticeable increase in enquiries, especially during the summer festival season,” Bergmann says.

Such initiatives are very visible at Spain’s Primavera Sound, where head of press Marta Pallarès says that inclusivity has a knock-on effect. Primavera was the first major festival to announce a 50/50 gender balance on its lineup and has a strong booking policy encompassing diverse artists. “Diversity on stage brings diversity in the audience – it’s that simple,” says Pallarès. Alongside its booking policy, Primavera’s approach includes a framework they call the “nobody is normal” protocol, which fosters an inclusive environment for women and non-binary people, LGBTQIA+ attendees, and anyone who may feel marginalised. “It’s about creating an environment where people feel encouraged to be themselves,” Pallarès says.

For many festivals, accessibility and inclusivity efforts are a key part of their ethos. German heavy metal festival Summer Breeze Open Air worked with Act Aware this year to create an Awareness concept. "It's part of our company philosophy," says spokesperson Alex Härtel. "It's important to us to make everyone feel welcome and create an environment that is as safe as possible," he says. Summer Breeze's infrastructure includes information booths and safe spaces where attendees can find support, seek advice, and connect with members of the awareness team. These initiatives were met with enthusiasm and positive feedback from attendees, who value the sense of safety and support provided on-site.

This commitment to fostering safer, inclusive festival spaces has become a cultural hallmark, changing the way people experience festivals. Pallarès believes this transformation helps festivals become trusted friends to attendees, providing not only music but also a sense of belonging and community. "We want to be a trusted friend for our audience, offering them both a sense of safety and a space to explore new music and make connections," she says.

Across Europe, there are organisations that help festivals with adjustments for disabled people, among them is the UK's Attitude is Everything [see founder Suzanne Bull's article on the link between sustainability and disabled people on page 29], which offers advice and support to help the industry be more accessible to disabled people.

In Portugal, Access Lab is transforming how festivals approach accessibility. Co-founder Tiago Fortuna says festivals are still catching up when it comes to offering truly inclusive experiences. "In Portugal, accessibility initiatives are still relatively new," he says, noting that some other countries, such as the UK and Germany, have been more proactive in offering accessible practices, such as companion tickets. "One of the biggest barriers here is the lack of companion tickets," Fortuna explains. "If you're disabled and need assistance, going to a festival in Portugal costs twice as much because you have to buy a ticket for your companion, too."

Access Lab has worked with Portuguese festivals to introduce companion tickets and accessibility measures like haptic vests for deaf attendees, audio descriptions for the visually impaired, and quiet rooms for neurodivergent individuals.

In one landmark moment, pop star Dua Lipa partnered

with Access Lab during a performance at NOS ALIVE in Lisbon, delivering a message in sign language to the Deaf community. "It's about making people feel seen and included," Fortuna explains. "Even small gestures make a huge difference."

And in France, Inclusiv'Events offers consultancy and equipment to festivals to help them welcome disabled audiences.

"When accessibility measures are implemented, satisfaction is high," says CEO Rui Pereira. "But festival organisers often don't realise that. They ask: 'Why implement such measures if disabled people don't come?' But they don't come because the events aren't accessible. It's a vicious cycle. I always tell promoters that accessibility benefits everyone. There's also the economic argument: disabled people represent 20% of the population in France; including caregivers and companions, this audience becomes enormous.

"Making festivals inclusive is really about centring well-being for everyone. For instance, the first people attendees encounter at events are often security personnel, who may not be trained in accessibility. With my Universal Accessibility Pack partners, we work on communication accessibility, such as for visually impaired people, and providing easy-to-read and understand materials. We offer inclusive services like sign language intermediation; inclusive bars; vibrating floors; tactile and auditory devices; applications for people with communication difficulties; pathways adapted for people with reduced mobility, and more. Whatever we don't have internally, we partner with other organisations to provide, such as audio descriptions, elevated ramps, or sign language performances.

"We don't focus on one type of disability but aim for inclusivity for all types. We also address invisible disabilities, creating a space where everyone feels welcome. That's our mission."

Inclusivity is essential to building a welcoming festival culture that appeals to all ages and backgrounds. "For many disabled people, attending a festival for the first time and finding that they can be accommodated and celebrated is life-changing," Fortuna explains. "These steps toward inclusion allow everyone to experience the magic of festivals."

Pallarès echoes this sentiment: "Post-pandemic, we've realised just how much we need these connections. Festivals create opportunities for spontaneity, surprise, and community. You come for an artist you love, but you might leave with a new friend or discover a genre you didn't expect to enjoy." She adds that this openness and shared experience are what make festivals essential not only to the music industry but also to cultural life more broadly.

Pereira says: "It's about enabling anyone to attend, no matter their challenges. Accessibility allows people to change their routine, socialise, and enjoy cultural and recreational experiences. Studies show a real demand for inclusive spaces, and people are very happy when these barriers are removed."

As Bergmann from Act Aware summarises: "Awareness is about learning together. At the heart of it is the simple goal of coexisting respectfully and creating spaces where everyone feels they belong." With the dedication of organisations like Act Aware, Access Lab, and pioneering festivals, Europe's music festivals are moving towards a more inclusive and accessible future for all.



The Awareness team at Reeperbahn Festival © Schörte Krüger



# Creating more inclusive festivals

Top tips from YOUROPE's Diversity & Inclusion Toolset.

By Katharina Weber

**W**hilst on paper most festivals appear to be open to everyone, there are still people who don't come to our festivals but would like to. Maybe this is because we failed to post access information on our website, because they feel that they wouldn't fit in, or because they're afraid they'll be harassed for being different. The same applies to potential employees who would like to become part of our teams and artists that would like to perform on our stages.

To help festivals build more inclusive and diverse live events – for the audience, artists, and their own teams – YOUROPE has developed a Diversity & Inclusion Toolset, which includes resources such as tests, checklists, interviews, reports, action plans, and inspirational stories.

The toolset contains chapters dedicated to tackling ableist, racist, and sexist/gender-based discrimination, and also covers awareness around diversity, the concept of allyship, best practice case studies, a glossary, and a diversity mission statement that event organisers are invited to adapt for their own purposes.

The toolset was developed by a team of event professionals and diversity and inclusion experts from across the YOUROPE network and was reviewed by an advisory board of external experts from different backgrounds that have themselves experienced discrimination.

The Diversity & Inclusion Toolset is free and available as a compact PDF or a more comprehensive online version.

Scan the QR code to access the toolset:



## Tips for creating more diversity & inclusivity

**Diverse staffing:** Recruit a diverse team of staff and volunteers, including people from marginalised communities, to ensure a welcoming environment for everyone.

**Advisory board:** If you are unable to recruit a diverse team, recruit a diverse external advisory board. This can help to bring in different perspectives and identify areas where your festival is failing marginalised groups.

**Staff training:** Provide training for festival staff and volunteers on recognising, preventing, and responding to harassment, including bystander intervention techniques, cultural sensitivity, and accessibility and how to treat disabled people.

**Designate support staff:** Assign designated points of contact for attendees seeking support or information related to sexual harassment and gender-based violence. Train volunteers to support festival attendees with disabilities or seek out organisations that can provide trained staff.

**Comprehensive policies:** Implement clear and comprehensive policies about behaviour that you do and don't want to see at your festival. For example, a zero-tolerance policy against gender-based violence, discrimination, harassment, and hate speech. Outline reporting procedures and ensure confidentiality for victims.

**Feedback mechanisms:** Establish channels for attendees and staff to provide (anonymous) feedback, including opportunities to report instances of discrimination and gender-based violence. Contact disabled people post-event to check that accessibility measures were effective.

**Emergency response plan:** Develop an emergency response plan that outlines procedures for addressing incidents of gender-based violence, sexual harassment, and assault, including coordination with local law enforcement and medical response teams.

**Safe spaces:** Designate safe spaces where attendees can seek support, report concerns, or take a break from overwhelming environments.

**Inclusive programming:** Ensure that the lineup and programme represent a wide range of musical genres, cultures, genders, sexual orientations, and backgrounds, reflecting the diversity of your audience.

**Gender-inclusive facilities:** Provide gender-neutral restroom facilities and gender-neutral shower facilities with private changing rooms and shower stalls and gender-inclusive signage. If that's not possible, offer male, female, and all-gender showers.

**Consent education:** Offer workshops, panels, and resources on consent culture and healthy relationships to educate attendees on the importance of mutual respect and boundaries.

**Community partnerships:** Collaborate with local support and advocacy groups for marginalised individuals to gather feedback and get support on topics where you lack expertise. Build partnerships and ensure their voices are heard in the planning process.

**Public awareness campaigns:** Launch public awareness campaigns to educate attendees on their rights, responsibilities, and available resources, e.g., related to the



© Sziget Festival

## A note on language

Across countries, people use a variety of terms when discussing disability. For consistency, we have chosen to use the phrase “disabled people” throughout the *European Festival Report*, in line with Attitude is Everything’s approach.

prevention of and response to gender-based violence and harassment.

**Inclusive vendor selection:** Prioritise vendors and merchandise sellers from diverse backgrounds, including minority-owned businesses and those representing different cultural traditions.

**Inclusive marketing:** Use inclusive language and imagery (not just Caucasian, good-looking 20-somethings) in promotional materials.

**Age-friendly policies:** Implement policies and amenities to accommodate attendees of all ages, including family-friendly areas, alcohol-free zones, and discounted tickets for youth and seniors.

**Religious accommodation:** Offer quiet spaces for prayer or meditation, accommodate dietary restrictions, and schedule performances and activities that do not conflict with religious observances.

**Financial accessibility:** Offer discounted rates and payment plans to make your festival accessible to those with a limited income.

**Online access info:** Have easy-to-find and easy-to-understand accessibility (and inaccessibility) information on your website.

**Maps:** Include clear accessibility information on your festival map.

**Hotline:** Operate a hotline before and during the festival where disabled people can easily get info.

**Ticketing:** Offer special tickets allowing disabled people to bring a supporting person (ideally, for free).

**Priority service point:** Create a service point specifically for people with special needs, where they can exchange tickets for festival passes, receive support, and get information.

**Entrance:** Provide a preferential access line and wide festival gates for disabled people.

**Venues:** Make all venues and stages accessible for everyone.

**Parking:** Offer dedicated parking spaces and a park-and-ride option near gates for disabled people.

**Public transportation:** Include local accessible routes and

schedules of public transportation on your website.

**Surfaces:** Provide wide, even, hardened, slip-resistant surfaces throughout your festival site.

**Raised platforms:** Offer raised platforms with ramps, chairs, facilities, and a clear view of the stage for disabled people.

**Ramps:** Provide ramps at stairs and on the curves and elevations of your festival’s terrain.

**Induction loop:** Offer induction loops for the hard of hearing on/near raised platforms in the vicinity of all stages and at the priority service point.

**Accessible toilets:** Provide at least one accessible toilet in each toilet block. Ideally, provide an accessible toilet near every raised platform, too.

**Sign language interpreter:** Employ interpreters to convey performances to attendees who are deaf or hard of hearing.

**Audio description:** Offer audio description for blind and visually impaired attendees

**Signs:** Provide high contrast sans serif signs that are readable in all light conditions and in high and low positions.

**Bars & food courts:** Make bars and food courts accessible by installing low counters.

**Relaxation zones:** Create quiet zones where disabled people can rest, recharge equipment, take medication, and shelter from the elements.

**Sustainability & accessibility:** Prioritise sustainability initiatives while ensuring that these efforts are accessible to all attendees, regardless of socioeconomic status and disability.

Scan the codes for specific advice on:

Accessibility



Anti-racism



Gender equity



# “Doing nothing will inevitably mean you get left behind”

Interview with Mika Christoffersen  
– Roskilde Festival

One of the core values of Denmark's Roskilde Festival is ensuring the event has an impact long after the final performance has ended. With the recurring theme of "Utopia – building the world of tomorrow," the 130,000-capacity non-profit wants attendees to leave the festival site with an augmented view of how they interact with the world.

Here, YOUROPE's Katharina Weber asks Roskilde's head of diversity, equity, inclusion (DEI), and behaviour, Mika Christoffersen, what advice she would give to festivals wanting to bring DEI to their events.

## What are the benefits for festivals/organisations becoming more diverse and inclusive?

Not missing out on talent and new ideas. Keeping up with the times and having a more diverse group of people to solve the issues a festival might be facing. It's also about appealing to new audiences; making sure that a more diverse group wants to attend your festival and feels comfortable while they are there. So, there are both moral and ethical obligations to working with diversity, as well as financial and business development gains to consider.

## Embracing DEI can seem overwhelming. Which simple changes could events and organisations start with?

Start small and just do something – anything. Getting the ball rolling is often the hardest thing. A good place to start is by looking at what's already going on. There are two places I'd suggest starting. First, who you are platforming? Who gets to have a voice at your festival, on your stages, and in your meeting rooms? Try working with inverse quotas when booking or recruiting – as in, who do we already have, and whose voices are we already hearing? Then work to fill in the gaps of who is missing on your stages and when decisions are made. The other thing is looking at who is already attending your festival and who is choosing not to. Look into why certain groups are missing – is it the programme [lack of representation?], is it about feeling safe [what's the culture like onsite?], is it about accessibility [a wheelchair user may not go if their friend can't get in]?



Roskilde Festival  
© Jacob Fredegaard Hansen

## What would you say to festivals that are afraid to touch DEI topics because they are scared of making mistakes and the backlash that might cause?

You're going to make mistakes. That's what happens when we do new things. But there are so many good resources, like the D&I toolset, that can help get you started. Be transparent and be clear that you're trying something new but want to learn and do better. Ask or partner with NGOs that are specialists in the area you want to tackle, that being accessibility, anti-racism, or inclusion. Ask questions, be curious, and know that just like with a music lineup, some people will love it, some people will wonder [loudly and maybe aggressively] why you made the choices you did because it's not for them or what they prefer, and some will think it's not enough. But doing nothing will inevitably mean you get left behind, and people, especially the younger generations, will find new spaces that do appeal to them.

## How does Roskilde pay for its measures, and what is your advice for festivals looking for opportunities to fund more diversity and accessibility?

Getting started with DEI measures doesn't have to cost anything – it's about a way of doing business and how we approach the world. The way we book our stages, the way we recruit, the way we prioritise themes and agendas, what we gather data on, how we plan our safety measures, and what information is provided in FAQs and marketing material. What it does take is intention and willingness to learn and listen. To try new ways of doing things. Partnering with NGOs, universities, schools, clubs, and volunteer experts are some of the ways we started working towards our DEI goals.

# Lessons from Das Fest: How to introduce an awareness concept

By Katharina Weber

**F**or many years, Karlsruhe-based festival Das Fest was one of Germany's biggest free festivals. Even after financial realities made it necessary to charge visitors for the main stage, tickets remained incredibly affordable. In 2024, day tickets for the main stage cost just €15, whilst the other three stages remained free. So, you could say that inclusivity is ingrained in Das Fest's DNA.

This year, Das Fest introduced an "awareness concept" which set out policies that meant people – attendees, staff, and artists – could get help if they felt harassed or discriminated against. Societal changes and incidents within the team were the driving factors behind the concept, according to Steffi Ernst, project officer F&B and awareness coordinator at KME, the company behind Das Fest.

The initiative builds on the festival's SOS islands concept. "SOS islands are 3x3m tents within the crowded areas of our festival [where attendees can] report something or get help," explains Maximilian Scheer, project officer of event safety and security at KME. "But they are run by security and sometimes medical staff, who are not the ideal contact people for awareness issues," he adds.

So this year, Das Fest recruited around 30 people to join its inaugural awareness team. Festival attendees could reach out to the team in an awareness tent, which also served as a safe space, while two mobile teams roamed the site during peak hours to help attendees.

The whole process from ideation to implementation took about a year, according to Anni Böck, co-lead of the team. A working group evaluated the current status and services, came up with recommendations, then developed a written concept, which was revised in cooperation with the anti-discrimination office of the city of Karlsruhe.

The initiative was implemented in the 2024 edition of Das Fest, which took place in July, and was evaluated during and after the event.

Das Fest © Steffen Eirich



## What worked

- Visitors received info on the introduction of the concept thanks to the press, festival website, Instagram, the programme booklet, banners on fences at the festival, and screens at the stages.
- Visitors were curious, engaged in many great conversations with the awareness team, and evaluated the concept positively.
- Cooperation with partners (police, German Red Cross, and security) worked well.
- The awareness team was well-prepared thanks to a training workshop given prior to the festival.
- Offering an awareness point and mobile teams, which changed every 2-3 hours, including an overlapping shift-change to keep everybody informed about incidents, worked well.

## What didn't work

- Mobile teams weren't always able to reach the location to which they were called in good time. In 2025, Das Fest wants to introduce a third mobile team.
- Communicating via mobile radios was new for many awareness team members and sometimes led to confusing situations. Next year, the plan is to better explain the process and include a radio practice session.
- Awareness team members wore purple vests that tended to get overlooked in large crowds. Next year, caps and/or flags will be introduced to make them more visible.
- Employees mostly got in touch with the awareness team after the event and were often unaware that the concept also exists to support them. In 2025, communication clearly needs to be improved.

Like all other activities, Das Fest finances its awareness exclusively through the proceeds from ticket sales, drinks sales, and other direct income.

# Are we really fit for the future?

The third year since the industry restarted post-Covid brought with it new challenges, surprising insights and, of course, a multitude of magical moments. But to address the former and achieve the latter, successful cooperation between all those involved in festival production, and especially the audience, is required. To help achieve that, YOUROPE and its steadily growing number of member festivals – currently 133 from 30 countries – continue to work towards consolidating and strengthening the sector.

By Holger Jan Schmidt, YOUROPE general secretary

**T**he question of whether European festivals are future fit cannot be answered with a simple yes or no. Instead, it must be seen as an ongoing and likely never-ending process based on anticipation, adaptation, and innovation. To support festivals on this journey, YOUROPE's experts have been working for the past three years on the association's network project Future-Fit Festivals (3F). This project focuses on creating new tools, advocacy activities, knowledge transfer, and capacity-building formats. Conceived during the height of the pandemic, resilience, responsibility, and relevance were chosen as 3F's three key themes – with a particular focus on safety and reliability; diversity and inclusion; and climate change and the EU Green Deal.

2024 was the busiest year yet for 3F, with events and publications in numbers never before seen. But without a doubt, it was worth it. As the production period for the 2024 *European Festival Report* draws to a close, so too does the 3F project period. Here, *EFR* reflects on what YOUROPE and the sector have been engaged with.

YOUROPE's working groups and project teams created five seminars and training events in four European countries and with almost 1,000 participants; created the Diversity & Inclusion Toolset [see page 32] and Festivals for Ukraine Toolkit [page 42]; and published the *3F Safety Report* [page 52].

In addition, #WeVoteForEurope, the largest joint European festival communication campaign to date was launched, supported by over 120 festivals from more than 30 countries. At the beginning of the summer, the campaign called on festival audiences to make use of their right to vote in the EU parliamentary elections. YOUROPE also cooperated with member festival EXIT in Serbia, in the Life Is Live initiative, which deals with the wellbeing of young people and the value that real experiences have in contrast to digital events.

Post summer, the largest pan-European fan survey ever was conducted, with more than 7,000 participants [page 44], providing insight into the desires and demands of young people attending popular music festivals. At the same time, the third edition of the festival promoters survey was conducted in cooperation with *IQ Magazine* for this report.

Experts and industry leaders shared first-hand experiences and challenges – both in interviews and during panels at conferences. These weren't limited to leading European industry events (such as ESNS, ILMC, GEI, Reeperbahn, and MaMA), experts also contributed to discussions at FestForums in Santa Barbara, promoted the European green festival movement at Canadian Music Week, and at the Creatives for Climate Action Summit in Bangkok, where the European Green Festival Roadmap 2030 is now serving as a model for a similar project in Thailand.

Following the European Festival Summit (in November) that assembled more than 200 promoters, professionals, and stakeholders from the popular music festival sector, the year will close with the administration of the 14th European Festival Awards [page 40].

Acknowledging the fact that we are dealing with an ongoing process, we are proud to announce that YOUROPE has successfully applied for a follow-up project to 3F. During the summer, we received confirmation that we will continue to be funded by the Creative Europe programme from 2025 to 2028 to focus intensively on the future viability of the European festival industry. This is a significant recognition of the quality and relevance of the achievements made. Therefore, shortly after the publication of this report, 3F will continue producing new tools and guidance on additional focus topics, such as fair ticketing, extreme weather, and resistance to new threats, whether political, economic, or societal.

# YOUROPE Updates

## Event sustainability

Once a year, GO Group [Green Operations Europe] invites everyone interested in sustainable event production to a workshop in which we showcase the newest developments and demonstrate best practices. In 2024, the two-day workshop was hosted in Bratislava with the help of Pohoda Festival, attracting 39 participants from 14 European countries. The takeaways from this event are available for free in the YOUROPE Hub.

### Topics include:

- The most recent sustainability stats – delivered by A Greener Future.
- Tempelhof Lab case study – a series of concerts dedicated to testing innovative green technologies. The results were turned into a blueprint for other events to copy.
- Pohoda Festival – a champion of sustainability in Eastern Europe.
- Rosendal Garden Party, which made significant progress in recording elusive travel emissions.
- The travelling format Dialogue in Music, addressing the challenges of climate change.
- Overcoming barriers to sustainability (especially in Eastern Europe).
- Scope X and its role in festivals. [Scope X describes the influence we have on society, our partners, and relationships – extending the Greenhouse Gas Protocol's Scope 1–3.]
- How to foster cooperation on sustainability with artists.
- How to accelerate the green transition in the festival sector.

GO Group is YOUROPE's think tank founded in 2011 with the goal of helping events to become smarter and greener. GO Group also presents the Green Operations Award at the European Festival Awards and contributes to YOUROPE's publications, such as the European Green Festival Roadmap 2030.

### GO Group workshop takeaways:



Opposite: Rock en Seine • © Louis Comar



## Event safety & security

Keeping up-to-date with new data and findings is crucial when it comes to event safety and security. Each year, the YOUROPE Event Safety Group (YES Group) brings experts together for events such as the annual seminar at ESNS in Groningen.

This year's programme included case studies such as the site design of Happiness Festival [DE]; the ingress and egress at Rock am Ring [DE]; and emergency planning and the influence of the PA system on event safety.

In November, YES Group provided a full day of programming at the IBIT event safety conference in Cologne [DE]. YES Group experts delivered sessions to more than 300 participants, including a tabletop exercise on dealing with cyberattacks. They were asked to imagine how they would deal with a scenario in which two hours before opening their event, a hacker threatens to erase their festival's database and demands 1m in Bitcoin. Afterwards, YES Group hopped on a train to MaMA Festival & Convention in Paris to deliver a panel concerned with last-mile management, ticketing problems, and the risk of cyberattacks.

The group's biggest contribution to event safety this year is the recently published *3F Safety Report*, which provides an in-depth analysis of the challenges and opportunities faced by the festival industry in a post-pandemic world, focussing on the years 2022 to 2024. Topics include operational challenges such as staff shortages, inexperienced teams, and extreme weather conditions and associated risks; as well as crowd management issues, like the behaviour of a new generation of festivalgoers; threats such as terrorism, political activism, and cyberattacks; and the necessity of detailed documentation for both pre-event planning and real-time incident management. Read more on page 52.

### YES Group seminar takeaways:





Awareness team members at Das Fest © KME/ Julius Schade

# Diversity, equity & inclusion

To help festivals become more diverse and inclusive, YOUROPE released its Diversity & Inclusion Toolset in 2024 [page 32]. This toolset served as an inspiration for the group's first seminar on diversity, equity, and inclusion (DEI) at festivals, which took place in Paris in October and included 33 participants from 11 countries and the kind support of MaMA Festival & Convention. The takeaways from this event are available for free on the YOUROPE Hub.

## Topics include:

- Why DEI matters.
- The definition of discrimination and how different forms intersect.
- The definition of privilege.
- How to write awareness concepts, codes of conduct, etc.
- Creative ways to make festivals more accessible.
- How to build more diverse teams.
- How to be a better ally.
- Roskilde Festival case study: helping visitors to thrive.
- Cooltural Festival case study: accessibility in all areas.

Lessons learned include: diverse companies are more financially successful; representation matters – in the audience, on stage, and within the organisation; becoming more inclusive may lead to making mistakes, but that's okay because it's a learning process for everyone.

## DEI seminar takeaways:



# Communication & marketing

To support an exchange of knowledge, YOUROPE continued its cooperation with Festival Playground for the third year running. Aimed at festival organisers, HÖME – Für Festivals rented an entire Center Parcs and invited more than 600 industry professionals along.

## Topics included:

- The Struggle is Real: insights and strategies for festival communication – with Immergut Festival.
- Status Quo: East Europe on Ukraine's cultural life during the war – with Vlad Yaremchuk (Atlas Festival).
- Fan & Ticket Marketing 2025 – change your strategy for higher ticket revenues and long-lasting fan loyalty.
- 10 AI Tools for your festival.
- Is this covered by the freedom of arts? How music and society influence each other.

In addition, YOUROPE member Roskilde Festival presented a session on why they have chosen "Utopia" as a strategic theme for three years. The key takeaways are available on YOUROPE.org.

# YOUROPE Hub

Over the last year, YOUROPE has been working on its YOUROPE Hub – a collection of resources for festival makers who want to create better events. As of November, the hub contains almost 200 posts, including the organisation's proprietary publications and content from other organisations within the wider music industry – including guides, reports, scientific documents, survey results, case studies, and interactive tools, such as CO2 calculators – with the goal of demonstrating the current state of the industry, keeping readers informed about new developments, and teaching them how to run better, greener, and safer events.

## Topics include:

- Communication [audience, stakeholder, marketing].
- Environmental sustainability [energy, food & drink, materials & waste, strategy & awareness, travel & transport, water].
- Safety & security [business & continuity management, counterterrorism, crowd management, emergency management, last mile, risk & crisis communication, risk management].
- Social sustainability [allyship, anti-racism & diversity; responsibility; fundraising & awareness; gender & sexual equity; mental health & wellbeing; inclusion & accessibility].



Scan to access the YOUROPE Hub



© Josef Furis



© Josef Furis

# European Festival Summit

The European Festival Summit (EFS) gathered 200 people from over 20 countries to tackle the challenges facing the festival industry. The event, organised by YOUROPE in partnership with Karlsruhe Marketing und Event (KME), featured a packed programme addressing topics such as AI, sustainability, Gen Z engagement, and extreme weather preparedness.

Keynote speakers and panellists explored the transformative potential of festivals in today's shifting landscape. Futurologist Max Thinius set the tone, urging organisers to see festivals as tools for societal change. Panels like Quo Vadis, Festivals? examined rising costs, sustainability gaps, and the complexities of attracting Generation Z. Social media expert Julius Lutz emphasised the importance of "bold and real" narratives to connect with younger audiences.

Technological innovation featured prominently, with a debate on AI's potential to enhance festival operations. Sustainability pioneers like Boom Festival and Karlsruhe Institute of Technology showcased practical initiatives, including circular construction and biodiversity-focused designs. Meanwhile, cybersecurity experts from Germany's Federal Office for Information Security discussed risks like ransomware and strategies to protect digital infrastructure.

Interactive workshops included planning safer festival layouts to exploring VR applications in event logistics.

The event also included a moving concert by pianist and singer-songwriter Maksym Chmyr, of pop band The Castle, which was streamed from Lviv in Ukraine.

YOUROPE's chairman, Christof Huber, called the summit "a big success," highlighting how its smaller, more focused format encouraged open dialogue and meaningful exchanges.



© Chris Jensen

# Building transatlantic bridges

YOUROPE and its member organisation Future of Festivals have recently concluded a groundbreaking two-part exchange initiative that brought together European and American festival organisers. This collaboration began at FestForums in Santa Barbara, US, and continued in Berlin, Germany, at the Future of Festivals trade fair.

The initial meeting in February saw festival leaders Signe Lopdrup (Roskilde Festival, Denmark), Marta Pallarès (Primavera Sound, Spain), Jenn Yacoubian (Goldenvoice/Coachella), and EJ Encalarte (Festival Productions Inc, US) explore themes such as fan loyalty, safety, talent acquisition, and festival values.

The commitment to ensuring a safe festival experience emerged as a core value for all panellists, bridging cultural and regional differences. They also underscored the role of festivals as agents of social change, with Lopdrup noting, "Festivals should live the change they want to see in order to make the world a better place."

Sustainability was also a major topic, with Encalarte highlighting the importance of starting with small steps and Pallarès stressing context-specific actions, which led to a discussion about shared solutions and cross-region adaptability.

Then in November, at Future of Festivals in Berlin, many of the panellists reconvened to reflect on the festival season.

The completion of this two-part collaboration marks a new era of exchange between European and American festivals, creating an international foundation for continuous learning and positive cross-border industry impact.





# The European Festival Awards

The 14th edition of the European Festival Awards will take place at ESNS on 15 January. The ceremony will feature a brand-new category – the New Kid on the Block Award – which will be presented to an individual, 30 or under, who has made a name for themselves in the international music festival business through exceptional achievements and creativity.

In November, juries were busy selecting the best festival, lineup, agent, promoter, and newcomer band, with specialist awards presented to events that have made substantial progress in sustainability, event safety, brand activation, and social responsibility, and with two individuals honoured with the Lifetime Achievement Award and Award for Excellence and Passion.

For more info, the shortlists, and/or to purchase tickets: [europeanfestivalawards.org](http://europeanfestivalawards.org).

## 2023 WINNERS

**Best Small Festival**  
Maifeld Derby, DE

**Best Medium-sized Festival**  
Pohoda Festival, SK

**Best Major Festival**  
Hurricane Festival, DE

**Lineup of the Year**  
Glastonbury, UK

**Newcomer of the Year**  
Balming Tiger, KR

**Promoter of the Year**  
Alter Art, PL

**Agent of the Year**  
Tom Schroeder –  
Wasserman Music, UK

**Award for Excellence & Passion**  
Eric van Eerdenburg, NL

**Lifetime Achievement Award**  
Ruud Berends, NL

**Green Operations Award**  
Boom Festival, PT

**Event Safety Award**  
OpenAir St.Gallen, CH

**Brand Activation Award**  
Heroes & Hype Festivals  
& Unilever Axe, DE

**Take a Stand Award**  
Sziget Festival, HU

# Music continues to save Ukraine

**Vlad Yaremchuk, head programmer at Atlas Festival in Kyiv and partnership manager at Music Saves Ukraine, offers an in-depth look at how European festivals are supporting its work.**

As Ukraine faces a third year of war, European festivals continue to support those in need with a partnership between YOUROPE and Music Saves Ukraine (MSU), the humanitarian aid initiative of the Ukrainian Association of Music Events.

The initiative saw the MSU team visit festivals across Europe to tell their stories, whilst European festival representatives visited Ukraine to see first-hand the realities of a country at war. The MSU team also provided resources to festivals, empowering them to raise awareness and funds.

MSU has continued its mission to use the power of music to make a difference. With the war showing no signs of abating, their work remains essential. Thanks to support from the European music and festival industries, the initiative raised €630,000 by October, with all funds going to humanitarian aid and the rebuilding of cultural infrastructure in Ukraine. Here are other ways we've been working over the past 12 months.

## Music Ambassadors Tour

In March, the team organised the second Music Ambassadors Tour – a project in which some of the biggest names from the international music industry, including festival organisers, promoters, artists, journalists, and cultural figures, visit Ukraine to witness the conditions there first-hand.

This year's participants included YOUROPE members Christof Huber (OpenAir St.Gallen, Gadget), Markus Wiersch (Das Fest, YES Group), Michal Kaščák (Pohoda Festival), József Kardos (Sziget Festival), Ville Koivisto (Provinsi), Girts Majors (Positivus Festival), and Robert Westerholt (Within Temptation).

During a five-day stay, the ambassadors visited Kyiv to see how the city's residents have adapted to the realities of wartime. An hour before guests arrived, Russia launched



# EUROPEAN FESTIVAL AWARDS CELEBRATING THE ACHIEVEMENTS, SUCCESS AND INNOVATIONS OF THE CONTINENT'S LEADING FESTIVALS

AWARD SHOW  
15 JANUARY 2025  
GRONINGEN

TICKETS:  
[EUROPEANFESTIVALAWARDS.ORG](https://europeanfestivalawards.org)

EUROPEAN  
FESTIVAL  
AWARDS

14<sup>TH</sup>  
EDITION

CELEBRATING THE  
FESTIVAL SEASON 2024

See TICKETS presents

hypersonic cruise missiles, fragments of which hit the Mykhailo Boychuk Kyiv State Academy of Decorative and Applied Arts and Design.

They also visited other towns in the region in which the destruction was visible; heard personal stories from those who survived the occupation; visited the House of Culture in Borodyanka, home to a music school that was completely wiped out during the occupation; visited the Kyiv Rehabilitation Institute, which is engaged in the rehabilitation of Ukrainians affected by the war; and saw how MSU was able to help with necessary equipment, thanks to the efforts of YOUROPE's Festivals for Ukraine fundraising campaign and the Pohoda Loves Ukraine event.

In June, MSU released a documentary - *Music Ambassadors Tour 2024*.

**Watch the documentary:**

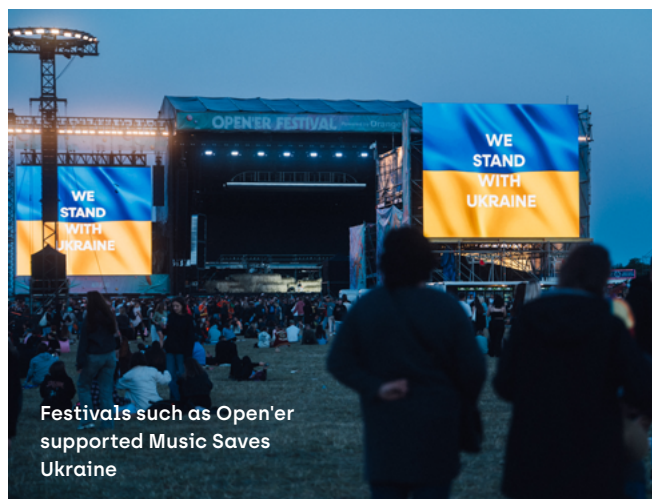


## Summer Festival Tour

This summer, Music Saves Ukraine hit the road to participate in some of Europe's biggest festivals, to spread the message about the current situation in Ukraine and raise funds for humanitarian aid.

The team established a dedicated Music Saves Ukraine zone at various festivals, including Provinssi (FI), Open'er (PL), Pohoda (SK), Das Fest (DE), ARTmania (RO), Sziget (HU), and Lowlands (NL), and at three sold-out shows by German band Die Ärzte on the Tempelhof Airfield in Berlin.

The MSU zone offered festivalgoers the opportunity: to talk to the team about their experiences living amidst war; to learn about artists who are fighting or who have sacrificed their lives defending their homeland; to see a photo exhibition showing the reality of what is happening in Ukraine – from



Festivals such as Open'er supported Music Saves Ukraine

grim pictures of destruction and suffering to inspiring demonstrations of resilience and strength; and the chance to buy Ukrainian-themed merch to help MSU with its humanitarian mission.

Additionally, the team helped festivals book Ukrainian artists, organised and took part in panels dedicated to Ukraine, screened the *Music Ambassadors Tour* documentary, and initiated other fundraising activities.

Collaborations were also done with festivals such as Superbloom (DE), Pinkpop (NL), OpenAir St.Gallen (CH), Summer Sound Festival (LV), Positivus (LV), Les Eurockéennes de Belfort (FR), and 66 hodin (SK). Funds were raised by selling charity merchandise, recycling cans and bottles, and collecting cup-deposit donations.

MSU worked with 15 festivals in ten countries, bringing nine Ukrainian artists to festival stages and raising some €80,000, which will be spent on humanitarian aid and rebuilding Ukrainian cultural infrastructure.

## Festivals for Ukraine Toolkit

In July, MSU, in collaboration with YOUROPE, released the Festivals for Ukraine Toolkit, developed as part of YOUROPE's three-year Future-Fit Festivals (3F) project.

The toolkit comprises various measures and activities that festival organisers can undertake to use their events as a platform for raising funds and awareness. It contains step-by-step guides, case studies from some of Europe's biggest festivals, and advice on how to implement schemes and activities during events and festivals.

The toolkit has been tested and continually improved upon since the invasion of Ukraine in early 2022. Based on cooperation projects with YOUROPE and many of its member festivals, as well as other European music festivals and events, thousands of people were reached and significant funds raised, including for the initiative's 2024 Summer Festival tour, which raised €80,000.

The toolkit can also be used to support any social cause an event wishes to advocate for. It's YOUROPE and MSU's hope that it will enable the music event industry to realise the immense potential it has to make the world a better place for all.

If you are willing to use your festival or event as a force for good and help Ukraine during its most challenging period, message Vlad at Music Saves Ukraine: [vlad@musicsavesua.com](mailto:vlad@musicsavesua.com).

To keep up to date on the initiative's projects, learn more about Ukrainian culture and humanitarian aid, follow Music Saves Ukraine: [www.instagram.com/musicsavesukraine/](https://www.instagram.com/musicsavesukraine/) or [www.facebook.com/musicsavesua](https://www.facebook.com/musicsavesua).

The toolkit is free to use and can be viewed online or downloaded as a PDF.

**Access the Festivals for Ukraine Toolkit:**





# Marta Pallarès

Head of press – Primavera Sound, Spain

## How was this summer's festival season for you?

Primavera Sound is always the first festival in the season. This year was particularly rewarding – we finally found the perfect format that we want for the festival in Barcelona. It was very stable, felt like a homecoming, and really embraced the city. Barcelona is our main headliner, in a way, and finding the right format for the festival to complement that is something we're really proud of.

## What challenges does the festival industry face? And how are you aiming to address them?

The biggest challenge ahead for festivals is the lack of headliners. Artists are leaning more towards stadium shows, where they have better control over production and merchandise. Of course, we need big names, but at Primavera, we also aim to create our own headliners by thinking outside the box. Especially since 2019, with our first-ever gender-balanced lineup, we made several artists a headliner even though some people questioned it. But we believed in them, and it turned out to be the right choice. We rely on our instinct to craft a lineup that makes sense as a whole – it's almost like being a trusted friend to our audience, someone who introduces them to new music they'll love. It's a way of keeping our lineup fresh and meaningful, despite the industry challenges.

## What trends do you think we will see play out in the next few years at festivals?

I think we're going to see festivals that are more diverse, respectful, and sustainable. These issues are core values for the new generations. You simply can't have a festival that doesn't offer vegan food or that ends up covered in plastic cups – it doesn't match today's expectations. Artists are also increasingly using their platforms for activism, so festivals need to keep up. For example, Massive Attack have been vocal about environmental issues, and artists have been central to recent political movements. While making sustainable festivals affordable is still a challenge, I think we'll find a way forward as a society.

## Can you share some of the DEI (diversity, equity, and inclusion) measures or initiatives you have in place at Primavera to ensure they are welcoming places for everyone?

Diversity on stage brings diversity in the audience – it's that simple. We started with gender-balanced lineups, which had an immediate impact. From there, we developed the Nobody is Normal protocol, which promotes a safe experience at our festival. Nobody is Normal is more than an anti-harassment protocol; it's about spreading inclusiveness. We worked with specialists in gender violence, law, and mental health to create a protocol that doesn't just react to incidents but sets a standard. It's about encouraging everyone, including women, LGBTQ+ individuals, and nonconforming people, to express themselves freely and feel safe. We want everyone to know that this is how we do things here – everyone is welcome to be themselves.

We also take accessibility seriously. We have special seating areas, accessible paths, and we welcome assistance dogs. For attendees who feel overwhelmed or have sensory sensitivities, we've created safe spaces where they can take a break. But we still want to do more, particularly for people with non-visible disabilities, which is something we're working toward.

## What role do festivals play in the cultural landscape?

Festivals bring people together in a way that few spaces do. Coming out of the pandemic, we've all realised just how much we longed for human connection. Festivals are special because they create space for discovery and the unexpected. You might come for a specific headliner but end up finding new artists you love or make unexpected connections with people. It's not like going to a concert, where you know what to expect – it's a whole world of surprise and spontaneity.

If you've never been to a festival, you might think it's just too expensive, but when you get the chance to go, you realise it's much more than a concert. It's about community, music, and discovery. It's a way to encourage openness and curiosity that I think benefits people, culturally and socially.

# Audience survey

## What do festival audiences want?

Discover the results of a survey of over 7,000 festivalgoers by event network Höme and YOUROPE.

By Höme co-founder **Isabel Roudsarabi**

**E**uropean festivals have had a rough ride these past few years. After Covid, inflation took its toll, pushing production and staffing costs higher and higher. Meanwhile, major international acts are gravitating toward stadium shows over festival slots. It's not exactly a new trend, but it's one that's still making it tougher for festivals to sell tickets and provide fresh and exciting experiences for their audiences each year.

Some of the bigger festivals, often backed by global corporations or investors, are still managing to sell out and keep steady attendance numbers but plenty of others have been struggling – some closing their doors permanently.

To get a clearer picture of what audiences are looking for in these challenging times, YOUROPE and Höme (through the latter's event discovery platform infield) launched the European Festival Fan Survey this year, in which event attendees were asked about their preferences on everything from activities and value-added services to accommodation, sustainability, social responsibility, and budget.

Over 7,000 people from 46 countries responded, offering a wealth of insights into what they love, what they don't, and what shapes their festival behaviour. In the following pages, we dive into the survey results, breaking down the findings and exploring what they might mean for the future of festival culture.

## The bigger picture

The majority of survey respondents [33%] come from Germany, followed by Finland [12%], Switzerland [10%], and Kosovo, France, and Czechia [5% each].

Survey participants overwhelmingly love multi-day festivals [90%], with a strong preference for events in rural areas [37%] or cities [31%]. A quarter of respondents say they attend showcase festivals while 21% attend single-day events. Major festivals with over 50,000 attendees remain the top choice for most [52%], while festivals with over 25,000 visitors come a close second [28%]. However, it's worth noting that many of the people who took the survey were likely directed to it by larger festivals, which naturally represent a bigger slice of the target audience

and are therefore more likely to attract survey participants.

The survey's main age group is 21–24, followed by 25–29 and 18–20, putting the core focus on the older side of Gen Z (born between 1995 and 2006). Exactly half of those that responded live in cities, while 36% live in small towns.

In terms of gender, 61% identify as female, 37% as male, with around 2% identifying as non-binary or gender diverse, and 1% preferring not to disclose. This skew toward female respondents could reflect a general trend in which women are more likely to participate in surveys.

While over half of our respondents go to just one or two festivals per year, about a third say they go to between three and five. Most attend with a small group, typically bringing along up to three friends [68%].

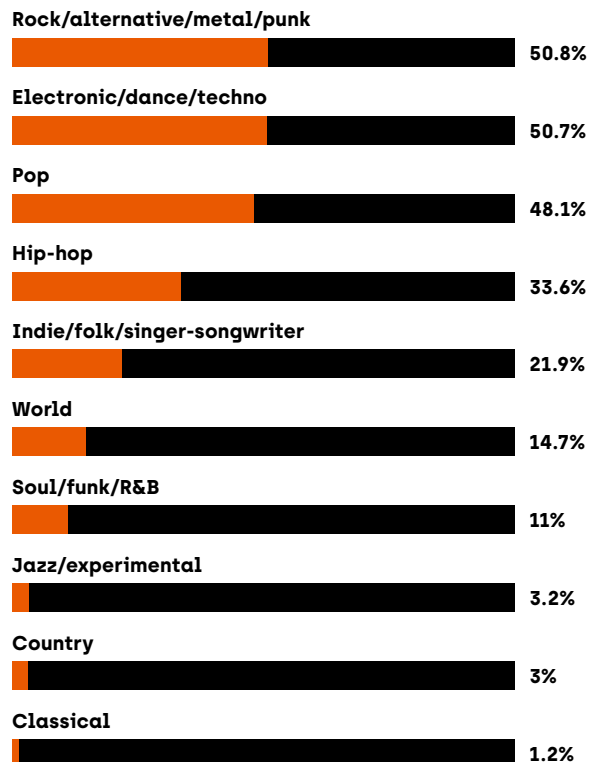
Interestingly, 43% of respondents have already travelled abroad or plan to travel to a festival in a different country. This points to the potential for a thriving festival tourism economy, where people are encouraged to explore events across Europe, supported by tailored services and more information about international festivals.

When it comes to preferred music genres (with multiple answers allowed), rock and related genres [51%] tied with electronic and dance music [51%] as top choices, followed closely by pop [48%] and hip-hop [34%].

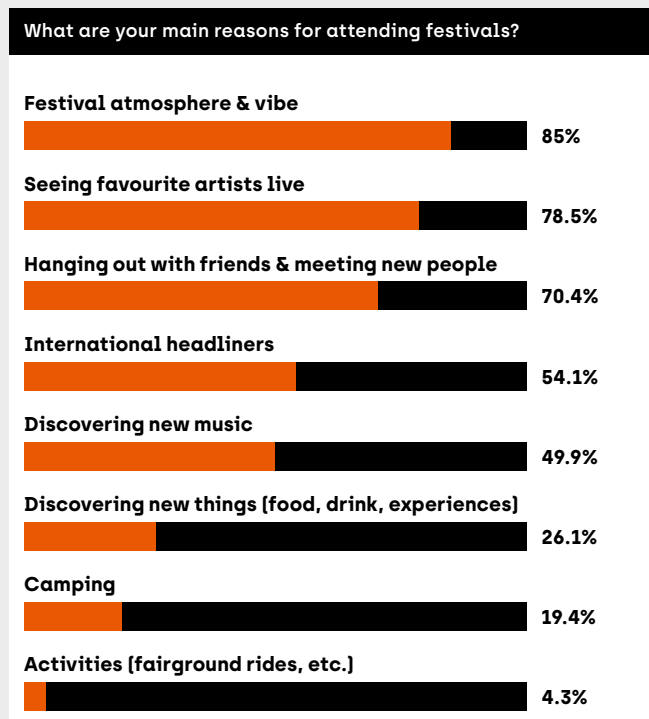
## General preferences

Part of the survey set out to understand what actually drives people to buy festival tickets and what extra perks might sway

### What are your favourite genres of music at festivals?



their decisions. When asked about their primary motivations for attending festivals, over 6,000 people (85%) say it's the "festival atmosphere and vibe", ranking it even higher than "seeing my favourite artists live" (79%) and "hanging out with friends and meeting new people" (70%). While international headliners are still a big draw for more than half the respondents, extras like fairground rides don't seem to hold much sway. Perhaps unsurprisingly, only 20% of respondents say that camping was one of the main reasons for attending. That said, the classic tent is still the top accommodation choice for nearly half of those surveyed, with staying at home and booking an Airbnb or holiday rental coming in second and third, respectively.

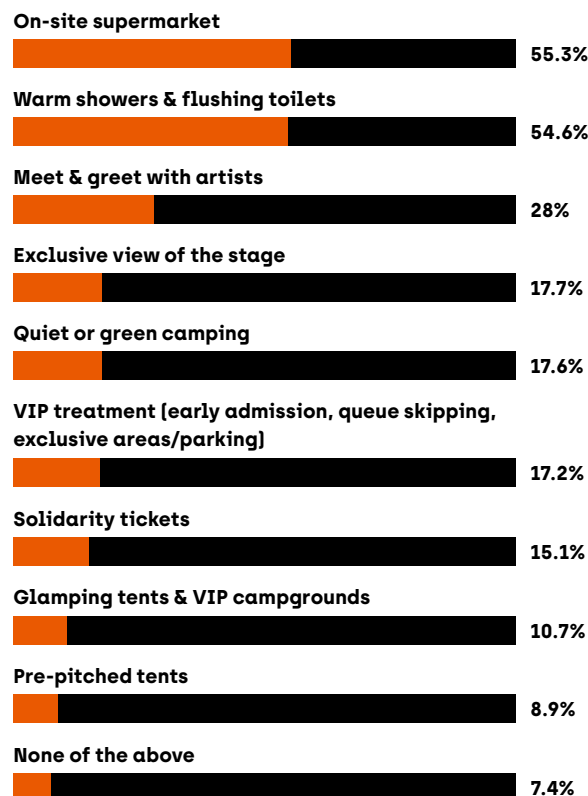


One clear takeaway is that 84% of our respondents say that they have discovered new artists at festivals, which reinforces the idea that even though some acts choose traditional tours over festival appearances, the latter remain powerful platforms for building fanbases. Around two-thirds (63%) report meeting new people and half say that they have made new friends at festivals. Another 38% say they've learnt something new at a festival, demonstrating that these events offer more than just music.

When it comes to add-ons that would tempt festival-goers to spend money, just over 55% say an on-site supermarket would be valuable and just under 55% would pay for warm showers and flushing toilets. In contrast, 28% would pay for a meet-and-greet with their favourite artist and even fewer would pay extra for an exclusive stage view (18%). Some 18% said they'd pay extra for "quiet" or "green" camping and 17% would splash out for VIP perks (early admission, queue skipping, exclusive areas). Still, if we translate these percentages into actual numbers, for a festival with 50,000 attendees, 9,000 people might be willing

to pay extra for VIP or green camping. This represents an opportunity to increase revenue without needing to sell more tickets.

#### Which add-ons would you spend extra money on?

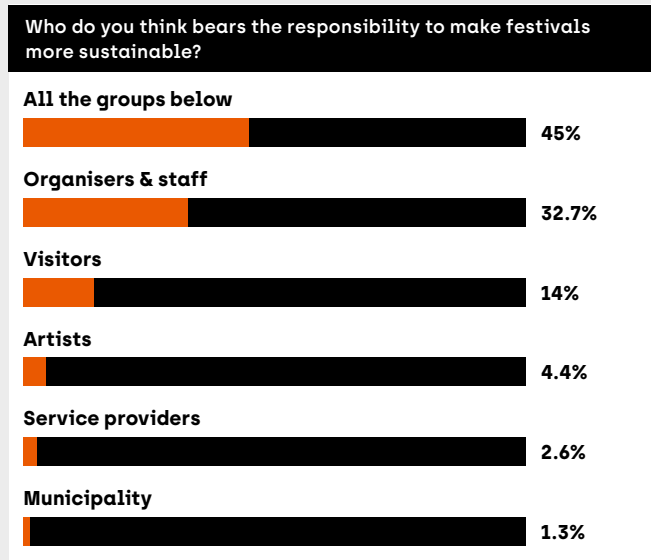
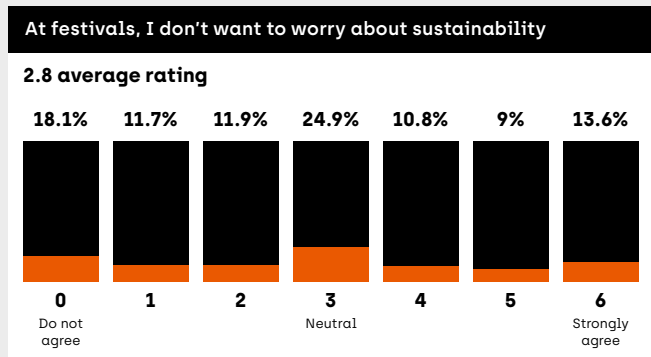


We also asked attendees if they'd be willing to pay more for their ticket to help subsidise lower-priced tickets for people who otherwise couldn't afford to attend (so-called "solidarity tickets" that have become more common in recent years). While most attendees aren't eager to fund these tickets directly – only 15% say they would – 42% believe organisers should offer them as part of their social responsibility and to help keep festivals inclusive and affordable amid rising ticket prices.

## Sustainability

Surprisingly, 23% of those who responded agree with the statement "at festivals, I don't want to worry about sustainability," while another 29% disagree with it and over half remain neutral.

Meanwhile, 45% believe that making festivals more sustainable should be a shared responsibility, involving organisers, attendees, artists, local councils, and service providers alike. By contrast, 33% of visitors think the responsibility rests solely with festival organisers, while only 14% believe it's down to the attendees alone. This tendency to push the primary responsibility onto organisers is also reflected in how festivalgoers travel. For a →



significant portion, the car is still the go-to option [43%], with long-distance trains a distant second [16%]. Air travel accounts for only 5% of attendees' main transport to festivals.

According to the survey, 63% would consider switching to an eco-friendlier mode of transport if options were easier – things like cheaper travel tickets, faster connections, shuttles from train or bus stations to the festival, or even luggage transport services. About a third [32%] would opt for a greener option if there were shuttle buses running directly from their hometown to the festival and 28% would attend local events if there were more interesting options available. Still, a stubborn 12% say they wouldn't change their means of transport, no matter what. The good news is that the vast majority [79%] are willing to pay a small fee to help festivals adopt eco-friendly measures. Most would chip in between €1 and €10.

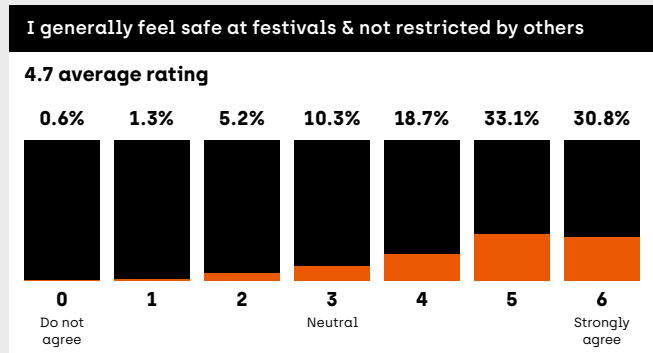
When asked what steps festivals should take to become more sustainable, the top request was for free water-refill points to encourage reusable bottles [87%]. Other popular suggestions include banning single-use plastics [63%] and offering more regional and seasonal food [49%] rather than focusing on vegetarian or vegan options [only 15% were keen on that].

Only 11% of respondents support reducing parking spaces, highlighting how deeply ingrained car travel is for festivalgoers. Other proposals were also met with limited enthusiasm – prohibiting smoking [14%], forgoing hard liquor [7%], and avoiding exclusive shows by overseas headliners [4%]

were all relatively unpopular ideas. It's clear that while attendees may support sustainability measures, convenience and tradition still play a big role in their festival experience.

## Safety & social responsibility

When it comes to safety and freedom from harassment at festivals, the picture is fairly positive. More than 4,600 out of 7,000+ respondents say they feel safe and unrestrained by others, with only 7% reporting that they feel somewhat insecure on site – averaging a score of 4.7 on a 0-6 scale.



Much of this sense of security seems to stem from the safety and social responsibility measures that festivals have put in place, which should clearly remain a priority going forward. In recent years, we've seen a wide range of initiatives, from on-site mental health and "psy-care" teams [support for attendees struggling with drug-related issues] to emergency helplines, codewords at bars, improved lighting along camping paths, and clear communication related to antidiscrimination and inclusion. These efforts appear to be making a difference, with 68% of visitors saying such measures make them feel safer than they would without them.

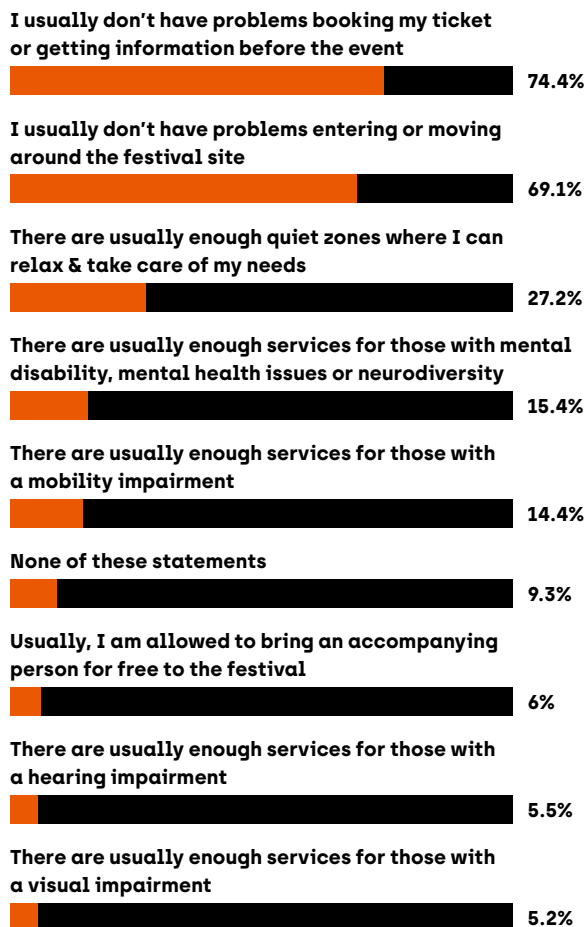
Interestingly, when asked if extreme weather events would make them feel less safe, 63% either disagreed, partly disagreed, or felt neutral – suggesting that weather isn't a major factor for most when deciding whether to buy a ticket.

The survey also revealed that inclusivity matters to festivalgoers, with 83% agreeing that everyone should feel welcome, regardless of their background. Additionally, 58% believe festivals have a social responsibility. However, addressing specific political issues [15%], booking more artists from marginalised groups [16%], or aiming for a gender-balanced lineup [17%] were less of a priority for those surveyed.

Among the 920 survey participants who identified as being disabled or neurodivergent, 883 shared insights on their experience of festival accessibility. For the most part, booking tickets, getting pre-event information, and navigating the festival site aren't their main challenges.

Where festivals fall short, is in providing adequate services for people with visual and hearing impairments, mobility issues, mental health needs, and for those who are neurodivergent. Only a small minority [5-15%] felt there were enough provisions in place for these groups – figures that highlight a significant gap. Just 6% said they were allowed to bring a companion free of charge, which is far from ideal. Respondents also pointed out a serious lack of quiet zones where disabled people can take care of their specific needs.

Which of the following statements do you agree with?  
(answered by people who identify as disabled or neurodivergent)



## Budget

Amid ongoing discussions about rising production and booking costs – and the inevitable increase in ticket prices – the survey also explored festivalgoers' spending habits.

When it comes to annual ticket budgets, a quarter of fans allocate between €200 and €299, while a fifth are only willing to spend between €100 and €199. Meanwhile, 17% set aside as much as €300 to €399. Opinions on ticket pricing are split; about half of the attendees feel that festival tickets are fairly priced, while the rest believe they're too expensive for the programme and services on offer.

Considering the programme & services, I think ticket prices are:



Only 3% use secondary ticketing sites like Viagogo and StubHub as a means to buy their tickets and most [84%] prefer getting them directly from the festival's website.

When it comes to budgeting for groceries before the event, as well as food and drinks on site, responses varied widely – from as little as €1 to over €200. That said, the most common spending range (around 20% of respondents) was €80–€100 in each category. As for camping gear, a third [33%] have little to no annual budget for new equipment, setting aside €21–€40 or less, while 19% say they don't attend camping festivals at all.

## Key takeaways

So, what can we ascertain from the European Festival Fan Survey 2024?

First and foremost, the majority of fans are still drawn to large-scale, multiday festivals, with atmosphere, music, and social interaction being the main reasons they attend. While international headliners remain a draw, festivalgoers are increasingly prioritising the overall experience and setting. This highlights an opportunity for organisers to focus on creating memorable environments and a strong sense of community.

Interestingly, sustainability is still a secondary concern for many. Although a significant number feel that organisers should take responsibility for environmental measures, fewer attendees are willing to compromise their own comfort – particularly when it comes to transport. This suggests that, while there's a growing awareness of eco-friendly practices, it may take stronger incentives or a seamless integration of greener options to shift people's behaviour.

Another key finding centres on accessibility and inclusivity. While festivals have made strides in ensuring physical safety and site accessibility, they're still falling short on services for disabled attendees. This is an area where substantial improvements are still needed.

On the budget front, fans are split on ticket pricing: around half feel that current prices are fair, while the rest are feeling the pinch as costs rise. While attendees are generally open to spending on site, interest in extra services, like VIP passes, sustainable options, and meet-and-greets, is limited to a minority – albeit a significant one. However, with the right approach, these add-ons could still offer organisers an opportunity for additional revenue.

All in all, the survey paints a picture of a festival landscape where the essentials – music, atmosphere, and social connection – remain paramount. Yet, shifting preferences around sustainability, accessibility, and value-added services suggest that organisers will need to adapt to a more diverse and conscientious audience if they want to continue thriving in years to come.

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# Janina Zeller & Karen Jessen

Team leads, festivals – FKP Scorpio, Germany

## How was this summer's festival season for you?

Speaking for the company, this season has been highly successful. On a personal level, it was filled with great memories and remarkable shows, both big and small. All but one of our summer open-air festivals sold out, which is quite an achievement considering the challenging times our industry is currently facing. The reactions from the crowds on-site, our post-festival surveys, and a record-breaking presale all indicate that our guests were very pleased with this year's lineups.

On a more personal note, we'd like to emphasise that, beyond being a great place to spend time with our team, artists, and other partners, a festival also offers an opportunity for personal growth. You simply cannot anticipate every little detail; something always requires immediate attention, improvisation, and problem-solving skills. Still, after two challenging post-pandemic years, we consider ourselves fortunate to once again find enough time to observe how our guests were receiving the acts we curated. This reality check is always an integral part of our work.

Lastly, it's noticeable that everyone we work with has regained the confidence we were used to seeing before the pandemic. After the turbulent 2022 season, filled with uncertainties, the industry has found its rhythm again. That's great to see and very much needed for the trials ahead.

## What challenges does the festival industry face? And how are you aiming to address them?

The rising costs for virtually everything is a well-known issue across the industry, putting pressure on festival promoters because it's no longer enough to simply be successful – you need to sell out to achieve any kind of margin.

In addition, we're constantly striving to improve the gender balance of our lineups and have successfully increased female representation year after year. While we're very happy with showcasing a not only musically diverse lineup, finding headline acts that fit our musical identity and play festivals in general, remains a challenge. That's why we're firm proponents of fostering female talent in all our business areas.

## What trends do you think we will see play out in the next few years at festivals?

It doesn't feel right to call sustainability a trend, but we're glad to see that this topic has moved from the fringes of

society to centre stage. When we started our sustainability programme for festivals in 2013, we were more or less alone. Today, our guests actively demand progress in this field, which more and more people finally recognise as the most vital challenge of our time.

While any real impact on global climate change won't be decided on in the live sector, our industry has the power to spark awareness. That's why we're giving NGOs a lot of space at our festivals, while also leading by example through the combined sustainability measures across all our events.

We also observe ongoing advancements in stage production. Many artists aim to enhance their music with art, effects, or a cohesive narrative, resulting in a more immersive concert experience for their fans. This is no small feat considering the short set-up times at festivals.

## Can you share some of the DEI (diversity, equity, and inclusion) measures or initiatives you have in place to ensure the festival is a welcoming place for everyone?

As mentioned, more diversity on our stages is a vital measure in this regard, flanked by promotion of young talent through our band contest Gamechanger. In regard to our guests, our Panama initiative makes festivals more accessible and welcoming for everyone. The core idea is that people who are feeling unwell or uncomfortable get immediate help without having to explain themselves. Furthermore, measures to improve accessibility are constantly being reviewed and developed.

## What role do festivals play in the cultural landscape?

Festivals remain crucial for a vibrant and diverse music scene. For artists, they offer a chance to perform in front of large audiences who might not otherwise attend their concerts – yet. For fans, a well-curated festival is a great place to discover their next favourite band. As places for joyful discovery and open-mindedness, festivals play a pivotal role in the cultural landscape.

And speaking of open-mindedness, not only are festivals ideal places to leave worries and day-to-day life behind but they also constitute a unique forum for togetherness, which is sorely needed in a time that sees societies across the world becoming increasingly divided. We use this very consciously. For example, at this year's instalment of Highfield Festival, we reminded attendees through various means that they should vote for democratic parties in the state election.

# Behind the scenes with festivals' unsung heroes

Photographer Basile Barbey has created a unique photography project offering insight into roles at festivals that most people don't get to see – the thousands of volunteers who staff the medical and traffic management operations.





Photographer Basile Barbey teamed up with Pascal Viot, Paléo's director of safety, security & services, to create a photography project celebrating these usually unsung heroes.

"I've known Basile for about 15 years," says Viot. "A former security volunteer, he worked for ten years protecting the festival audience in front of the stages. After a break, he reached out two years ago to share his photography project focusing on the festival's first-aid volunteers, whose essential work often goes unnoticed."

Viot says volunteers are the soul of Paléo [CH]. "They bring a skilled, motivated workforce embodying the festival's values – respect, celebration, and community." Often festivalgoers themselves, volunteers dedicate their time to creating an inclusive and welcoming atmosphere.

Reflecting on Barbey's photographs, Viot describes his emotional reaction to seeing their work captured. One image shows a volunteer at the infirmary tenderly assisting an injured festivalgoer while a supervisor offers guidance – a touching testament to the compassion and professionalism volunteers bring. Another photo captures a lone volunteer managing traffic with calm resolve, illustrating the immense pride they take in their roles.

A particularly memorable moment from 2023 features two medical volunteers embracing after handling a life-threatening cardiac emergency. "In 30 years, it was our first time facing such a crisis," Viot recalls. Barbey chose to photograph only the quiet aftermath, highlighting the volunteers' humanity. "They don't just see patients; they see members of the Paléo community," Viot reflects. This sensitivity brings their work to life in a profound way.

For 2024, Barbey included traffic management volunteers, whose work is often overlooked. "Most people don't realise the impact of the traffic team," Viot says. "They ensure smooth movement from parking lots to festival grounds, setting a positive tone for guests' arrival." In one light-hearted photo, a 17-year-old volunteer cheerfully directs attendees, embodying Paléo's welcoming spirit. Nearby, a young boy looks on, hand on heart, touched by her warmth.

Barbey's project is more than art; it is a tribute to Paléo's volunteers. Viot and Barbey envision using these images for training, reflection, and exhibitions, celebrating the festival's backbone. "These photos remind us of the commitment our volunteers bring," Viot says, hoping attendees and organisers will recognise the dedication of these unsung heroes who truly shape Paléo's inclusive community.

# 3F Safety Report: festival safety post-pandemic

YOUROPE's YES Group share their findings from a three-year study into the new landscape facing festivals after Covid.

**T**he return of festivals and live events post-Covid brought a wave of enthusiasm, happiness, and good vibes across every event. After years of uncertainty and disruption, there was a collective sense of excitement to return to the "new normal," a deep sense of relief and eagerness to reconnect, with attendees and festival teams echoing the sentiment: "We're back!"

This excitement and its accompanying surge of energy left a lasting impression, showing that despite the challenges, festivals remain vibrant and full of life. It also highlighted how important events are for bringing people together.

However, alongside this jubilant feeling was a range of challenges – anticipated and new – that festival organisers, staff, and attendees had to navigate.

## The challenges

As festivals returned, they revived much of the communal joy and shared experiences that audiences had sorely missed. However, they also faced new challenges in safety, logistics, and crowd management. In 2022, amid the joy of being together again, organisers had to navigate a crowd landscape changed by years of social restrictions and a wave of first-time festivalgoers unfamiliar with large events. The heightened excitement of returning to live gatherings led to shifts in crowd behaviour, sometimes resulting in unsafe situations.

These logistical challenges were compounded by staffing shortages, with many festivals operating on reduced teams or hiring inexperienced staff. This issue persisted in subsequent years, with organisers often relying on a mix of seasoned and



Roskilde Festival  
© Matthias Grandjean

new hires, many of whom had limited time for thorough training or briefing.

The influx of younger attendees, many experiencing their first major festival, added another layer of unpredictability, requiring swift responses from already stretched teams. For organisers, balancing crowd safety, operational demands, and the dynamic nature of these events called for fresh approaches.

Adding to the complexity, extreme weather events – heatwaves, thunderstorms, and high winds – have become more common, posing significant risks. In Spain, for example, sudden high winds during the Medusa Festival caused a structure collapse, resulting in fatalities and injuries. Such incidents underscore the need for robust weather protocols, including evacuation plans, rapid-response teams, and clear communication with attendees. These plans aim not only to promote safety but to preserve the festival experience, striking a balance between spontaneity and the structure needed to ensure continuity.

Another major development in post-pandemic festival safety has been closer collaboration between organisers and local authorities, especially in regions facing potential terrorist threats. While counterterrorism measures were part of risk planning before the pandemic, recent years have seen European festivals forge even stronger partnerships with safety authorities. This is especially important in areas with heightened security concerns, as festivals work to maintain a fun and memorable atmosphere while prioritising resilience and preparedness.

Given all these challenges, the importance of knowledge sharing, learning from one another, and adopting best practices have never been greater. This culture of resilience is exactly what YOUROPE champions, fostering a community that supports safer, more adaptable festivals across Europe.

## Survey results

### Key challenges & changes 2022 to 2024

The YES Group conducted a three-year survey to analyse and compare the challenges facing festivals in the post-pandemic period. The findings reveal a clear evolution in priorities and operational challenges from 2022 to 2024. The initial excitement and "comeback" energy of 2022 – and to some extent, 2023 – gradually transitioned into a more measured and streamlined approach by 2024. Yet, issues like staff fatigue, budget constraints, and operational hurdles remained widespread.

As festival organisers adapted to this new landscape, their priorities also shifted. What began as a focus on crowd enjoyment soon transformed into a more comprehensive approach centred on crowd safety, with a particular emphasis on crowd management and robust safety protocols – especially important against the backdrop of economic and logistical challenges.

The survey results highlighted key trends over three years, charting the challenges, achievements, and changes that shaped the industry's adaptation in this period.

#### Inflation & production costs

Inflation and escalating production costs have put significant pressure on festivals. Prices for everything – from logistical equipment to staffing – have surged, forcing organisers to reassess budgets and find ways to optimise spending, including for essential safety measures. Balancing these budget constraints while upholding safety standards has become a complex challenge.

#### Logistics & environmental challenges

Some festivals faced outright cancellation due to unexpected logistical and environmental issues. Weather-related risks, in particular, underscored the need for greater preparedness, with robust backup plans to manage unpredictable conditions.

#### Crowd management

Crowd management has emerged as a top priority. With rising numbers of inexperienced festivalgoers and shifting behaviours among younger attendees, organisers have had to adapt their crowd control strategies to meet new demands. Major events like Boardmasters in the UK saw incidents related to crowd dynamics, highlighting the need for appropriate staffing and strategies to handle high-energy crowds safely.

#### Accreditation Misuse

The misuse of accreditations has also raised safety concerns, with some attendees gaining unauthorised access to restricted areas. This issue emphasises the importance of monitoring credentials closely to ensure that sensitive areas remain secure and off-limits to the general public.

## 2024



#### "What three words describe the 2024 festival season best?"

By 2024, organisers had also become more conscious of broader health and safety issues, from drug use at events to managing overcrowded VIP areas. Alongside physical risks, emerging behavioural risks began to take priority as organisers worked to provide safe and enjoyable experiences.

The evaluation of the three-year survey highlighted an industry that continues to grow and change, responding to both new generations of festivalgoers and unforeseen environmental and operational challenges. These shifting priorities reflect the industry's resilience as it adapts and innovates in response to new realities and evolving audience expectations.

## The role of resilience & preparedness in festival ops

#### Weather

In recent years, the need for resilience and readiness have become urgent, especially in light of tangible climate shifts. Outdoor events, already at the mercy of the elements, are increasingly at high risk from extreme weather such as heatwaves, storms, and other severe patterns. Europe, the fastest-warming continent, feels this impact acutely, with heatwaves and flooding posing real threats.

In response, event organisers have begun incorporating more targeted risk assessments, deploying specialised weather response teams, consulting meteorologists, and developing robust evacuation plans as part of their risk management strategy. These enhanced risk assessments specifically address weather-related hazards, helping festivals anticipate and counter climate-driven disruptions to keep events running smoothly wherever possible.

In Portugal, for example, the risk of extreme heat and wildfires has prompted festivals to establish guidelines and coordinate closely with safety authorities, ensuring they're prepared to manage these heightened risks.

Denmark, meanwhile, faces its own challenges with rain and wind. Event organisers there are advised to construct sturdy temporary structures and plan effective drainage systems to manage stormwater.



### Documentation

Resilience relies on meticulous documentation and planning. Detailed records of risk assessments, safety plans, and emergency protocols aren't just regulatory formalities; they're vital for the smooth operation of festivals. Documenting incidents, response strategies, and even "near-miss" experiences provides valuable insights that help improve safety over time. Real-time reporting and effective on-the-ground communication are also essential for swift and efficient incident response. For severe weather, for example, having documented details on the stability of structures, clear internal communication chains, and established external communication channels can make all the difference.

This focus on documentation and preparedness reflects a growing recognition within the industry of the value of shared knowledge. Effective risk management depends not only on ongoing assessment but also on learning from past events and adopting industry best practices. By making documentation and resilience central to their operations, organisers are addressing immediate safety needs while also fostering a more secure future for festivals. This evolving culture of resilience, supported by a data-driven approach to event safety, is helping to create safer, more enjoyable experiences for both attendees and staff.

### New focus threats

Modern safety planning now extends beyond traditional concerns like security, crowd control, and weather preparedness.

### Activism

In recent years, activism, opportunistic protests, and cybersecurity threats have added new layers to event safety considerations. High-profile festivals and large public

gatherings are increasingly seen as platforms for activism, presenting organisers with the challenge of balancing safety and public rights. In response, many are introducing security protocols that allow for controlled protest areas and providing clear communication to the audience to maintain a safe environment.

### Cybersecurity

Cybersecurity has recently taken centre stage in safety planning. Festivals now rely heavily on digital infrastructure for ticketing, crowd management, cashless payments, and entry scanning – making them vulnerable to cyberattacks that could disrupt these essential operations. To mitigate this risk, organisers are integrating cybersecurity measures into their risk assessments, safeguarding systems to protect sensitive attendee data and prevent disruptions at key points like entrance gates and food stands. Misuse of digital credentials and unauthorised access are particular concerns, reflecting the broader digital vulnerabilities of mass events.

### Controlling access

Accreditation misuse is a growing issue, especially in sensitive areas such as VIP zones and artist spaces, as was highlighted at EURO 2024, where a prankster gained field access using a fake credential. Such incidents underscore the risks of publicly sharing high-resolution images of accreditations, which can be used to create counterfeits. To counteract this, organisers are adopting advanced accreditation features like RFID chips and holograms while also limiting access to designs to prevent potential breaches.

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## What's next?

As new threats emerge, event organisers are adapting to address these risks proactively. Coordinated threat management strategies – including staff training in protest de-escalation, preparing for cybersecurity incidents, and closely monitoring credential use – demonstrate the industry's commitment to safeguarding the festival experience. Striking a balance between safety and freedom of expression helps to ensure that public events remain vibrant, safe, and accessible. As the landscape of potential threats continues to shift, festivals are staying one step ahead, working to preserve the unique atmosphere that makes these gatherings so appealing.

### Read the full 3F Safety Report:





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# Dušan Kovačević

Founder & director – EXIT Festival, Serbia

## How did things go at EXIT this summer?

The 2024 edition was a resounding success, filled with unforgettable moments and unmatched energy from everyone involved. The feedback has been overwhelmingly positive, reaffirming the unique spirit of EXIT.

This year's event was packed with unforgettable moments. For me, seeing Tom Morello of Rage Against The Machine performing live was a surreal experience. Their DNA is so closely aligned with EXIT's spirit, and they've been on our wish list since the foundation of the festival. I even dove into the mosh pit during *Killing in the Name* – it was a moment I had been waiting for for 24 years! Our legendary Dance Arena also lived up to its reputation, with electrifying performances from Carl Cox, Bonobo, and Black Coffee that kept the energy high all night. It was truly an amazing edition, and we're excited to carry this momentum into our 25th anniversary next year.

## What challenges does the festival industry face and how are you overcoming them?

The biggest challenge is undoubtedly the galloping inflation impacting every aspect of festival production. From artist fees and logistics to infrastructure and operational costs, prices have been rising sharply year after year, making it increasingly difficult to balance quality and sustainability.

## What are the advantages and disadvantages of being an independent festival in the current landscape?

Being an independent festival gives us the creative freedom to design EXIT exactly as we envision it, without the pressure of reporting to investment funds or large corporations that now own most major festivals. This autonomy allows us to innovate, take risks, and focus on what truly matters, and not just Excel sheets. For example, had we not been independent, we would never have managed to become the first major festival in the world to take place after the pandemic in 2021.

However, operating as an independent also means navigating the complexities of the industry without the financial backing or infrastructure that larger corporate entities enjoy. In today's landscape – marked by rising costs and increased competition – it can be challenging to maintain sustainability while continuing to grow.

That said, our independence allows us to stay agile and connect more authentically with our audience, which we believe is one of EXIT's greatest strengths. It's a balancing act, but our independence is also our identity – something we

deeply cherish and will continue to embrace. I truly believe that independence will become one of the greatest advantages for festivals in the years to come, especially as younger generations increasingly value it.

## Can you share some of the DEI (diversity, equity, and inclusion) measures or initiatives you have in place to ensure EXIT is welcoming for everyone?

Since its inception, EXIT has been a place where everyone is welcome, regardless of their nationality, race, religion, or background. EXIT played a pivotal role in the early 2000s, bringing together young people from the war-torn Balkan States for the first time in over a decade. This made EXIT a symbol of reconciliation, unity, and hope for a brighter future.

Mental health initiatives have been a core focus for years, as we firmly believe that festivals are vital for the mental well-being of young people – a fact that became especially evident during their absence throughout the pandemic.

We are particularly proud of the Life is Live campaign, launched in partnership with UNICEF in 2023. This initiative addresses mental health by identifying digital dependency as one of the most dangerous addictions facing today's youth. It highlights the irreplaceable value of real live experiences and the importance of human connection.

In 2024, the campaign evolved to focus on the paradox of our hyperconnected yet increasingly lonely digital lives.

## What role do festivals play in people's cultural lives?

Festivals play an immense role on many levels in our societies and have become an essential part of the cultural life of young people. However, if I had to highlight one key aspect, it would be their role as one of the few remaining massive social gatherings for young people. In an era dominated by digital interactions, festivals provide a rare space for people to engage in real, face-to-face experiences. These kinds of experiences are becoming increasingly rare, which is why festivals are more important than ever. They offer a space where people step away from their screens and immerse themselves in the present moment.

In a world where digital spaces dominate, festivals like EXIT remain vital cultural touchstones. They remind us of the irreplaceable value of live, human connection and the joy that comes from truly being present with others.



# How to solve the headliner problem

With artist fees skyrocketing since the end of Covid, festivals are feeling the pressure on their budgets. So what are the solutions? **James Drury** investigates.

One of the key findings of this year's European Festival Survey – and a topic frequently brought up at conferences, including the International Festival Forum (IFF) and European Festival Summit (EFS) – is just how concerned promoters are about headliner fees.

Whether you're a major event vying for stadium-filling acts or a small festival with a more modest budget, the problem is industry-wide. For promoters, rising fees for artists are compounding the problem of inflation across all their costs, at a time when consumers are worried about their wallets, meaning festivals are very sensitive to ticket prices.

The reasons for rising fees are multiple. The well-

documented rise in production costs also applies to artists, for some of whom touring is becoming almost unfeasible. In one high-profile example of how bad things have become, Kate Nash recently announced she was selling photos of her backside on OnlyFans, as it was the only way she could make enough money to tour. She says her Butts For Tour Buses campaign means she can afford accommodation, food, promotion, and crew. "I want other artists to know that they're not alone – so many artists are having to cancel tours because they can't afford it. It costs more to present a live show than it ever has," she told *The Independent*.

There's also the issue of the strength of the dollar against other currencies, which makes it not only very expensive to bring US acts to Europe but also means the market is less appealing for artists who can stay at home and make more money.

But recently, there's also been a change in artist strategy. For some at arena- and stadium-level, it's preferable to have full control of their shows and production, so they choose to tour venues rather than festivals. With the huge leaps forward in terms of number of stadium shows over the past few years, acts of a certain level are choosing to take the money from these runs instead. As Mikołaj Ziółkowski of Poland's Open'er told EFS: "Most of the big acts want to do big shows, with huge →

## The headliner problem

production and a lot of staff. Often, festivals can't accommodate that anymore, so acts choose to go with more money, their own audience, and their own production when they play stadium shows."

And, as agent Matt Bates of Primary Talent International told IFF in September: "When you're a huge artist, nowadays, there's a tendency to do your own thing rather than performing at a festival, which would've been the norm ten to 15 years ago."

## Solutions

So what are the possible solutions? For some festivals, such as Switzerland's OpenAir St.Gallen, the answer is to no longer aim for the very top of the market. As Gadget Entertainment festival director Christof Huber, who runs the event, told EFS: "We used to have acts such as Muse and Depeche Mode as headliners, but I think these times are over for us." He says the festival is now going for acts that are more affordable – in many cases, looking away from UK and US artists "who are either not available or not affordable."

Many festivals are turning to domestic artists as a more affordable alternative to US acts (who are increasingly too expensive due to the strength of the dollar) or other acts for whom international touring has become very costly.

It was immediately after the pandemic that this trend really took off. In many places, crossing borders was banned, meaning the only touring that was happening was by acts in their own markets. That gave them the opportunity to capitalise on the vacuum left by foreign artists.

"The domestic market in Sweden now is bigger than it's ever been," All Things Live's David Maloney recently told *IQ*. "That's something we are really concentrating on now." And in Denmark, Brian Nielsen, CEO of DTD Group points to Aarhus-born Tobias Rahim, who spent nearly 40 weeks at the top of Denmark's singles charts, as "an Ed Sheeran-type story." Rahim went on to headline Copenhagen's 17,000-cap Royal Arena and land prominent slots at key Danish festivals Tinderbox, NorthSide, and Roskilde.

"As a new artist, he went straight to arenas from airplay," Nielsen said. "With the way the audience is finding new music, primarily via streaming, the movement is so much faster. We've seen a big change with Danish acts playing bigger venues than they used to, and Tobias is a really strong example."

In Spain, Concert Studio's Carlos Pérez says: "Traditionally, promoters used to hire more international artists, specifically, Anglo-Saxon ones. However, after the pandemic, the work of national artists is highly valued. In fact, they occupy a large part of the lineups of our festivals."

It's the same story in Poland. Sara Kordek, creative director of Poland's Good Taste Production, which is behind concerts and festivals such as Next Fest, Jazz Around, and Jarocin Festival, told *IQ* that the company had 30 arena shows announced for domestic acts like Mrozu, Daria Zawiałow, Kwiat Jabłoni, and Ralph Kaminski.

"Last year, we were doing club tours with these artists, and then we put them on our travelling festival, Summer Sounds, and now we have announced arena tours for spring, and they are selling pretty well – like, 80% sold out in some



cases," said Kordek.

One way of solving the conundrum of booking artists who are touring for shorter periods in order to keep down costs is to move dates. Lollapalooza Berlin is switching from September to July for its tenth anniversary edition in 2025.

"It's not easy to book the artists that we would like for the beginning of September," explains Goodlive festival director Fruzsina Szép, who's behind the event. "Many artists are finishing their tour period at the end of August, so it makes sense to move Lolla to the middle of the summer, when more artists are available. Lolla Berlin has taken place in September for the last nine years, so it's a big move, and we are hopeful those dates will work well."

## Festivals as cultural leaders

With the biggest acts now becoming unaffordable for many or choosing to do their own solo tours in stadiums and arenas, maybe this is the time for festivals to act more as cultural leaders – telling their audiences who is worthy of a headline slot rather than being beholden to audience demands.

During IFF, Primary Talent International agent Bates said: "A major positive about headliners doing their own thing is that festivals now have a better opportunity to help break through emerging acts and mid-level artists."

And for some, the solution seems to be to buck the trend of offering day tickets. Down the Rabbit Hole in the Netherlands only sells three-day passes – no individual day tickets are available. This means bookers can curate a lineup that's more of a package rather than three individual headline shows.

"We try to create what we call a flock of artists," festival director Ide Koffeman told *IQ* earlier this year. "So it's not at all just about the headliner. We look at what the artists stand for and the diversity of the programme, and then we get a nice flock that tells a story. This year, it worked out very well. I am completely satisfied, and I don't say that every year. We had a lot of great reactions from our audience, too."

He added: "We like to present acts that can do a successful show without being stadium level. With our formula, we do have room to play with the possibilities. So, perhaps on Friday, we have a spectacular new act that's a future headliner, and on Saturday, a more-established act. And then it all adds up, and people buy tickets for the whole package. It's like booking one big show."

## The festival as headliner

One way to reduce the reliance on headliners is to create an event that people want to come to, regardless of who's playing. While they do feature exciting and popular artists, festivals such as the UK's Glastonbury, Dutch stalwart Lowlands, and Germany's Superbloom have focussed on developing an experience that attracts fans to buy tickets without needing to know who's performing.

"It's something that is in the heads and I hope also in the hearts of people," says Goodlive's Szép, who came up with the concept for Superbloom in 2020 and has overseen three editions (including during the pandemic, which saw it postponed twice). "I've heard it said many times that 'Superbloom is Munich, and Munich is Superbloom,' and that means we have found a home, which I'm very thankful for,



because it's not easy to establish any brand nowadays and keep it going, [let alone] become a loved brand."

In Serbia, EXIT Festival's Dušan Kovačević says the rising costs of headliners led to the festival itself becoming the headline act rather than a select number of big names. "The cost of acts will force other festivals to not rely too much on headliners but to focus on the overall experience instead," he said.

Lowlands festival director Eric van Eerdenburg says the key to cutting the reliance on headliners is to "build a community around your festival."

"It's not just a lineup. It's a culture we've established over the last 25 years and have managed to stay in touch with," he told *IQ* after this year's festival – his penultimate at the helm. "It's a three-day Fata Morgana [mirage] that everybody wants to be part of. You're there for three days, getting dazzled by it all, and then you wake up, and real life starts again."

He added: "Artists, especially the more successful ones, are getting more and more expensive, and that's worrying me. There's an ongoing struggle with agents who think their artist is worth more money."

"Within the agency business, nobody takes responsibility for the industry as a whole. No, they work for the artist, and they want more money. As a festival, we have to keep investing in artists to keep the profile of the festival, to keep the young people coming in, and to get a three-day full programme. But it all comes back to the ticket price."

One agent who is certainly looking for innovative ways to ensure the viability of the festival sector is CAA's Summer Marshall, who told IFF in September: "I'd encourage festival bookers to think more broadly about how they're structuring





deals. I welcome bonus structures on headline festival deals, and not even necessarily headlining the festival but headliners of other stages, too. It incentivises the artist and the festival and everyone to promote it. If you're taking a lower guarantee, but there's a bonus structure, then everyone benefits when a festival succeeds."

## Different entertainment types

One way of creating a unique vibe that attracts audiences without a lineup is to broaden the range of entertainment on offer. While this might mean fewer music acts, it still adds up to an amazing experience for festivalgoers, who are increasingly accustomed to playlist-style culture. Elements such as talks, theatre shows, circus acts, and cinemas are all increasingly common on bills.

In the UK, Live Nation's Latitude festival has long focussed on a broad range of arts, from dance, ballet, and literature to film, theatre, podcasts, and cabaret. This year, alongside acts such as Duran Duran, Kasabian, London Grammar, and Keane, it featured hit comedian Sara Pascoe; dance performances, including the London City Ballet; podcasts such as *Evil Genius* with Russell Kane, and a literary lineup including renowned astronomer Chris Lintott, presenter of Radio 4's *All in the Mind*, Claudia Hammond, King Crimson's Jakko Jakszyk, and Nigerian novelist Ayòbámi Adébáyò.

With so much entertainment on offer, whether it's music or not, festivals continue to represent incredible value for money. With a full festival pass in Europe costing on average €206.17, (according to our festival survey – see page 16), audiences can see hundreds of acts for almost the same price as a stadium concert.

"Festivals offer hours of experience," says Alter Art's Ziółkowski. "It's not just go in, watch a show, go home. This is our advantage."

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# Gill Tee

Founder – Black Deer Festival, UK

## How was the festival season for you?

It's been an interesting journey. This year's festival had some personal challenges for me, as I let go of my active role as festival director and handed the production of Black Deer to an external agency. It was an emotional experience, because I've been so deeply involved since the festival's inception. Walking onto the site and seeing things differently organised, like "my child dressed in the wrong clothes," was tough. But ultimately, I was free to enjoy the festival and chat to our community, which was a unique experience. The event still carried the DNA of Black Deer, with amazing artists, a great community vibe, and a warm reception from attendees.

## Tell us about the new one-day shows and Black Deer Radio.

Working alongside our MD, Chris Russell-Fish, Black Deer Radio and the one-day shows have been my big focus and part of our commitment to build Black Deer as more than just a festival – it's a brand with year-round engagement.

Black Deer Radio has already attracted about 5,500 listeners a month since it launched in June, and it gives grassroots Americana artists a platform alongside legends like Neil Young and Sheryl Crow. We are currently hosting our one-day shows (45 in total) in grassroots venues across the UK, which supports local music scenes and provides exposure for emerging artists. This approach allows us to reach new audiences while still promoting the genre that Black Deer represents, with plans to expand capacities next year.

## What challenges does the festival industry face, and how are you aiming to address them?

The financial aspect is the biggest challenge for independent festivals. While Black Deer's been running for years, with high production values, it's yet to break even, and without steady investment, it's hard for any independent festival to thrive. Funding is crucial – not just from sponsorships but from people who genuinely want to support the industry's growth. Black Deer has been fortunate to retain passionate investors who see our long-term vision and have supported us even through financial losses and challenges like the Covid-19 lockdowns.

We continue to expand the brand's year-round activities to maintain momentum and stay relevant.

## What trends do you think we will see play out in the next few years at festivals?

I'm noticing that younger audiences have a more mature approach to festivals; it's no longer just about the music and drinking as much as possible. They're looking for a wider experience. There's a need for festivals to incorporate more activities that appeal to this mindset. I believe we'll see more festivals providing diverse, alcohol-free options, and broader entertainment outside of music. Additionally, the financial pressures of large-scale festivals might lead to more one-day events and smaller, more affordable options that families can enjoy without the high cost of multiday festivals – certainly something we are looking at.

## Can you share the DEI (diversity, equity and inclusion) measures you have in place at the festival to ensure it's a welcoming place for everyone?

Inclusivity is a key part of Black Deer's ethos. Our SupaJam Stage has been part of Black Deer since year one, is very personal to me, and is one way we embrace diversity.

It's organised with neurodiverse students from three SupaJam colleges, who come from diverse backgrounds and have overcome significant personal challenges. These students gain hands-on experience in all aspects of production, and it's become part of their curriculum. Black Deer strives to be welcoming for everyone, and we're committed to creating more opportunities for young people who may not have access to traditional avenues in the industry.

## What role do festivals play in the cultural landscape?

Festivals like Black Deer are cultural touchstones. They offer a shared space for people to come together around music, heritage, and a sense of belonging. Our mission has always been to foster a sense of community, particularly around Americana and country music, which isn't always as visible in the mainstream. Festivals allow people to explore different genres, meet like-minded folks, and experience art in an immersive way. They're critical to nurturing emerging artists and keeping these cultural traditions alive for new generations.

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