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THE EUROPEAN FESTIVAL ASSOCIATION

EUROPEAN FESTIVAL REPORT **2025**



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EUROPEAN FESTIVAL REPORT 2025

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Welcome



The festival season in 2025 was once again characterised by bringing joy and lifetime memories to millions of people across the continent. Yet, below the surface, the pressures on festivals feel sharper than ever. Stadium tours pull the biggest artists into ever more exclusive cycles, and production costs are rising faster than ticket prices can. These themes have been with us for several seasons, but in 2025, they're joined by a force that is affecting more and more events: politics.

Across Europe, festivals are finding themselves drawn into cultural arguments, from artist bans and subsidy withdrawals to coordinated activist campaigns and shifting public expectations (see page 30). Attempts to limit artistic freedom, diversity, and open expression are no longer isolated events – nor confined to any single part of the continent. Festivals have always been spaces where people gather, imagine, question, and celebrate together. It's no surprise that, in a polarised world, these spaces have become targets.

Yet this report also shows something else: that festivals continue to meet these challenges with a mix of creativity, resilience, and sheer determination. The sector's structural pressures haven't disappeared – artist availability, rising costs, weather-related disruption, and the race to keep audiences engaged all remain top concerns (page 20). But throughout Europe this summer, festivals still welcomed millions; innovated, adapted, and proved once again that this sector's strength lies in how it works collaboratively.

That's why this fourth edition of the *European Festival Report* focuses more than ever on how festivals are resisting the pressures they face. You'll find insights into shifting audience behaviour; market-wide trends in ticketing and pricing; the increasing move toward domestic lineups; and fascinating interviews with key execs from across Europe. We can also see that the industry's core values – openness, dialogue, inclusion, sustainability – remain deeply embedded in how festivals operate.

As ever, this report is built on the contributions of hundreds of festivals, experts, and colleagues who shared data, stories, and experience. My thanks go to everyone who took part, and to the teams at IQ and YOUTROPE whose work makes this report possible. The result is an upfront look at a sector navigating changes – but also a reminder that festivals continue to create extraordinary cultural spaces where unity, imagination, and joy prevail.

I hope this year's *European Festival Report* gives you both a realistic picture of the challenges ahead and the confidence that, together, the industry continues to forge a bright future for festivals across Europe.

James Drury

Editor

Hello! How has your year been? Here at YOUROPE HQ, we've experienced the full spectrum of festival fortunes: triumphs, torrential rain, struggles, and successes. It's clear that we're not operating in the golden era we saw ten years ago. The times are tougher, the challenges more demanding.

Of course, this can't be generalised across the board. In the majority of cases, we still witness smoothly-run events and the unique festival magic that we all cherish. However, the issues facing festivals are as plentiful as they are familiar: skyrocketing production costs, headline artist availability, extreme weather, and changing audience behaviours. Were these themes not so incredibly relevant, one might tire of constantly discussing the same topics.

And yet, for the fourth consecutive year, we continue this conversation with our friends and partners at *IQ Magazine*. The *European Festival Report* has become an invaluable piece of festival culture – an unparalleled summary of an entire festival season. It was recently described to me by an EU-level contact as a "trademark publication." What more could we ask for?

Thankfully, it's the EU itself that allows us to produce this publication and offer it freely to readers around the world. The *European Festival Report* is also co-financed through YOUROPE's current EU-supported network project: 3F – Future-Fit Festivals 2.0. Following the resounding success of the project's debut, we've secured funding from Brussels until 2028.

In various formats, we work with festivals and experts from across Europe and beyond to explore themes such as resilience, responsibility, relevance, and resistance within the European festival sector. The latter – resistance – has become a particularly important addition, not just to our project but to the agenda of both YOUROPE and the wider industry.

Unfortunately, it's no longer rare for festivals to be exposed to threats and oppression. Activist groups are using festivals as platforms – sometimes in the form of cancel culture. Political parties are attempting to limit free speech, artistic freedom, and diversity. Increasingly, we're seeing examples of this from all parts of the continent – this is by no means an issue exclusive to Eastern Europe, even though the examples there may be the most pronounced. On a regional and local level, colleagues are encountering similar challenges, from the Atlantic Coast to Scandinavia and across to the Mediterranean.

Ten years ago, YOUROPE set out its mission statement, which defined openness, diversity, and cultural exchange as our guiding principles. From this, our Take A Stand Initiative was born – a message that perhaps carries even more weight today than when it was first launched:

"It's time to take a stand for Europe, and indeed for the whole world. To create a movement encouraging social cohesion in our society, promoting awareness and tolerance for all cultures, genders, ethnicities, religions, sexual orientations, colours, and origins. To motivate people to engage in politics and social activities, advocating for peaceful dialogue, humanism, tolerance, and mutual understanding, in order to make the world a better place for every individual and for all of us."

We commit ourselves to this mantra and invite you to join us. But first, we invite you to enjoy reading the fourth edition of the *European Festival Report*.



Holger Jan Schmidt

General secretary, YOUROPE – The European Festival Association

■ Image credit © Hara Amorós

The festival summer 2025

It may have been a year of yet more challenges, but festivals have continued to thrive, thanks to the creativity, joy, and determination of their teams. By James Drury.



Amid much discussion about the issues facing the festival sector, 2025 proved that the events remain key cultural moments for millions of people across Europe. Many celebrated landmark years, new festivals quickly drew significant audiences, while innovation and resilience remain guiding stars for everyone working in the industry.

There was much to celebrate this year, as a number of festivals marked record sales, including Norway's Way Out West, which not only saw the fastest ever sell-out in its 17-year history, but its highest attendance to date.

"This year's festival was special to us in many ways, and breaking our audience attendance record – 78,000 unique visitors over three days – for the fourth consecutive year is a true achievement," head of marketing at Live Nation-owned Luger Filip Hiltmann, previously told *IQ*.

"Friday and Saturday, headlined by Charli xcx and Chappell Roan respectively, were also the two most attended festival days in our history."

Speaking about the rapid sales, he remarked: "In the context of Swedish festivals, this kind of early sell-out is both rare and remarkable. Way Out West has become something of an institution within the Swedish festival landscape. After several strong years, we've reached a point where our audience has real confidence in what we deliver."

And Norway's largest festival, Tons of Rock, also saw its fastest sales, shifting all its full-festival passes.

Commenting on the record sell-out, Tons of Rock general manager Jarle Kvåle told *IQ* in April: "I think it's the

combination of people who have had a great time visiting the festival in previous years and a new audience that we've managed to recruit.

"We see that the number of people visiting the festival in recent years and returning is very high, and our customer survey also confirms that a large portion of the audience comes because of the total experience. We try to invest a lot in the audience experience, and it's great to see that people appreciate it. This, combined with the great bookings we have had in the last [few] years, are the key factors, and maybe also [because] the Norwegian audience just loves rock & roll."

For last year's tenth anniversary edition, Tons of Rock smashed its attendance record with 150,000 attendees. It marked a 50% increase from the previous record year in 2023.

Another 10th anniversary this year was Parookaville – Germany's largest electronic music festival. The July event has sold out every edition since it started, and for this special celebration, organisers brought back the first mainstage from 2015 (which was rented at the time due to budget constraints) as one of the 12 secondary stages.

For next year, it already has big plans to overhaul the campsite, which sees 50,000 people a year pitch up.

Bernd Dicks, festival co-founder and managing director of Parookaville GmbH says, "Ever since Parookaville was founded, we have been dedicated to effectively developing the festival further on behalf of our citizens and their wishes and comments."

■ Parookaville marked its 10th anniversary in 2025 © Julian Huke





■ Germany's Rock am Ring © Stefan Hipp

Also in Germany, a festival that launched before the fall of the Berlin Wall chalked up a milestone anniversary. Rock am Ring marked its 40th year in operation, while sister event Rock im Park notched up 30 years in existence.

"It was important to me to take the festivals to a new level, not just symbolically but structurally," festival CEO Matt Schwarz told *IQ* in September. "We wanted to elevate production to a standard never seen before at these events – and arguably rare across mainland Europe."

A seven-figure investment was made in the "reimagined" production for 2025, which included new LED delay towers, a 250-metre video wall, redesigned stages, and an additional fourth stage.

"The reactions – from fans, artists, and crew alike – made us feel [like] we'd truly taken the festivals to the next level," Schwarz said. "Success for us is measured by emotional resonance and long-term impact. Of course, ticket sales, a healthy balance sheet, and smooth operations are essential – but the real barometer is whether the experience stays with people. If they leave feeling inspired, connected, and already talking about coming back next year, then we've done our job."

And it's not just the veterans that are seeing success. Now in just its second year, Helsinki City Festival, promoted by Loud'n Live, drew more than 40,000 people to this year's

instalment in June – up from 27,000 in its first year.

The lineup comprised 85% international acts such as Sugababes, Afrojack, and Akon, on a broad lineup. "In Helsinki, there's an arts festival [Flow Festival], a metal festival [Tuska], and an EDM festival [Weekend], but there was a demographic of people who like music but aren't fanatical about a certain genre, and they weren't being catered to," the event's Esa Koivio (who has previously booked Finnish events Provinssirock, Weekend Festival, and Helsinki Festival) told *IQ*.

"We saw a gap in the market," she added.

Next year, organisers hope to scale up further and attract 60,000 people by adding a third day and changing location for a third time.

And in Italy, former New York Red Bulls goalkeeper Luca Lewis launched the Adriatic Sound Festival (ASF) in the Italian coastal city of Fano this summer. The event attracted close to 20,000 fans over two days to see acts including Rūfūs Du Sol, Richie Hawtin, Armand Van Helden, Nicole Moudaber, Sven Väth, Sama' Abdulhadi, Solardo, Stephan Bodzin, and simOne.

"I think it was the right time to launch, because the market is booming," he says. "You see DJs selling out arenas. Even here in New York, you'll have DJs perform at Madison Square Garden, which is unheard of."



■ Wacken Open Air in full splendour © WOA Festival GmbH

"We attracted people from 41 different countries, so it was the largest [number] of tourists that had come to Fano since the pope came in 1982, seriously! Every single hotel in the city was sold out."

In Czechia, Let it Roll underwent its biggest transformation in a decade as it moved to a lakeside location. "With its beachfront, mountain views, and plenty of greenery, it's easily one of central Europe's most beautiful festival venues," says the event's Marek Vohralík. "Our goal was to give fans a better summer experience, especially with rising seasonal temperatures. Ironically, after so many years of sunshine, we were hit with almost non-stop rain – Murphy's Law in action! Still, the new site delivered, and we're excited to call it our long-term home."

"Booking artists brought another set of challenges. As a dedicated genre festival, our headliner options aren't as broad as those at multi-genre events. And with drum & bass gaining popularity worldwide, we're now competing for top artists with much larger, non-European markets. Despite these challenges, our team rose to the occasion and delivered a memorable festival for our community."

Meanwhile, in Poland, festivals are drawing people to lesser-visited parts of the country. BitterSweet Festival (cap. 30,000) ran 14–16 August, attracting world-renowned acts including Nelly Furtado, Post Malone, and Peggy Gou to Park Cykada in Poznań.

"There were many comments from attendees like, 'Finally,

our city can host international acts, and I don't have to travel to Kraków or Warsaw,'" says Mateusz Jakielski of promoter Good Taste Production.

Around 15,000 full-festival passes and 38,000 daily tickets were sold, exceeding the expectations of Good Taste.

"Most residents said, 'Yes, let's do the festival, because we don't have an international profile within Poland, and maybe this will put Poznań on the festival map,'" Jakielski adds.

Goodlive-promoted Splash! Festival capitalised on the growth of German hip-hop in a banner year for the event. "German rap has always been, and still is, huge," says Kedist Bezabih, the company's head of international for rap festivals and touring. "We've seen a rise in the popularity and demand for our domestic acts across Europe, and the growth doesn't seem to stop."

The 25,000-capacity July event in Ferropolis in Gräfenhainichen featured artists including DoeChii, Young Thug, K.I.Z., Ken Carson, Yeat, and Schöolboy Q.

"DoeChii headlining Germany's biggest hip-hop festival was a huge highlight and felt extremely fitting given her rise and talent," Bezabih says of the Germany-exclusive performance.

Fellow Goodlive festival Superbloom attracted a record attendance of 60,000 people a day to its home at Munich's Olympic Park, with a lineup including Post Malone, Hozier, Shawn Mendes, Tiësto, Nelly Furtado, and Raye.



■ Paléo Festival Nyon in Switzerland © Lionel Flusin



■ Finland's Ilosaarirock © Antti Pitkälä

And despite being just four years old, it was also the first German festival to be livestreamed on Amazon Music, which the event's director Fruzsina Szép says marks a "major milestone" for an event still in its infancy.

"It not only proves how firmly Superbloom has established itself within the European festival landscape but also allows us to share our unique festival magic, music, and energy with fans everywhere," she tells *IQ*. "We're thrilled to take the Superbloom experience far beyond Munich, ensuring that everyone can enjoy their own slice of this special festival spirit."

Markus Wiersch, project leader at DAS FEST and deputy CEO of KME – Karlsruhe Marketing und Event GmbH, says: "Some images from DAS FEST 2025 have truly stayed with me: dancing children in the rain! Instead of going home, families stayed and kept celebrating. The atmosphere at DAS FEST was phenomenal – even in the rain and under the cloudy sky. That shows how much our visitors trust our team and how deeply they love DAS FEST."

"An unstable weather pattern meant it was almost impossible to predict how intense the rain or thunderstorms would become. The fact that visitors still came – and stayed – shows that they know: if things get critical, we communicate clearly and transparently. That trust is not something to be taken for granted – it's the result of years of reliable work by our team. Nearly 250,000 people came despite the weather forecast – absolutely sensational!"

Challenges

Yet, as established, it's not all been plain sailing this year. At the European Festival Conference (EFC) in November, YOUROPE chairman [and director of festivals at Swiss promoter Gadget Entertainment] Christof Huber reflected on a festival landscape marked by cancellations, postponements, and the ongoing war in Ukraine.

"Competition is growing, and there's immense pressure to deliver global stars – but there are relatively few of them, and their prices have tripled compared to five or ten years ago," says Colours of Ostrava artistic director Filip Košťálek, who despite having a "fantastic year" with increased numbers of tickets sold, spoke for many festivals when he talked about the issues facing the business.

"This year, it was especially clear that people are buying tickets at the very last moment – which is incredibly stressful for organisers," he continues. "Festivalgoers are reacting more to price changes than to lineup announcements."

Meanwhile, organisers of the world's longest-running dance festival say it will "start from scratch" after this year's edition. Superstruct-owned Mysteryland has been held in the Netherlands for the last 32 years and spawned international editions in Chile and the US but will go back to the drawing board after this year's edition.

"We've all heard the stories lately: event costs are high, and visitor needs are changing. So, we're going to look at both the costs and the content of the festival," says managing director Anna Wijntjes. "Starting from scratch obviously also has personnel consequences. Certain contracts will, unfortunately, not be renewed. A creative team will be assembled for the new Mysteryland."

The news came as it was announced that more than 50 Dutch festivals were cancelled in 2025, following 100 that cancelled in 2024, according to statistics from research agency Respons, compiled on behalf of the Netherlands Association of Event Makers (VVEM).

In other news, Hungary's Sziget Festival left its owner Superstruct Entertainment and returned to being independent – back in the hands of its founder and management team.

Superstruct acquired 70% of the Hungarian festival in 2017, becoming the live entertainment company's first major acquisition. But the companies agreed to separate following Sziget's 2025 edition.

"Superstruct's period of operational involvement in the festival allowed us to navigate the pandemic and to invest in the quality of the festival experience for visitors from across Europe – we are grateful for all their support," says Sziget CEO Tamás Kádár.

Sziget will move forward under the leadership of its long-standing team, and founder Károly Gerendai, who returns to the festival after eight years.

Meanwhile, in Portugal, the long-running Super Bock Super Rock, which did not take place in 2025, announced

it would return next year in a new format and in partnership with Live Nation. The event has been on ice since it was announced that previous promoter Música no Coração would no longer organise the festival after launching it 30 years ago.

"Super Bock Super Rock is evolving from its traditional three-day summer festival to a series of concerts throughout the year, starring true global music phenomena," reads a statement.

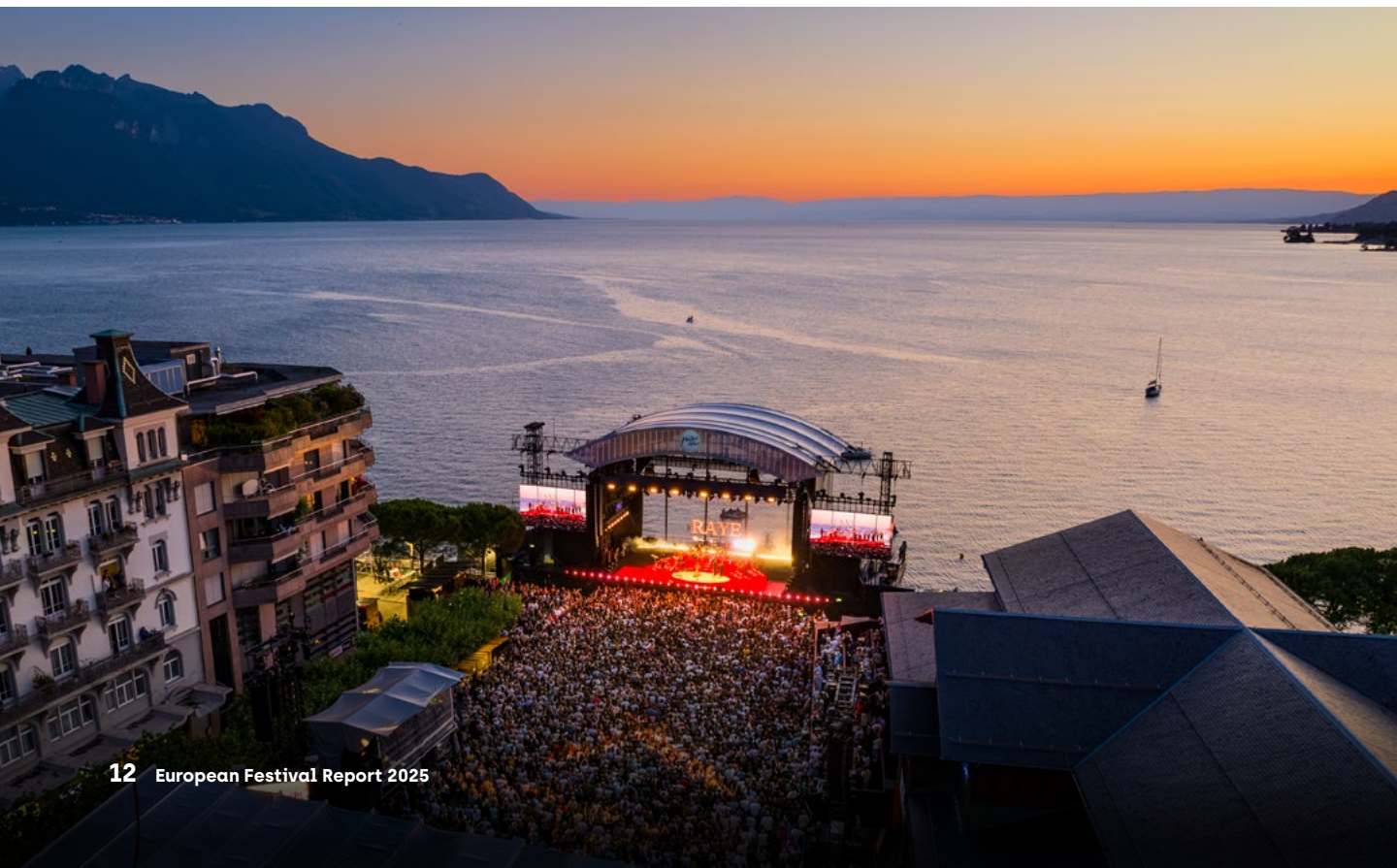
As Das Fest's Wiersch neatly sums up: "We're noticing that the overall conditions for festivals are becoming more and more challenging: climate change, rising production costs, increasing demands for safety and sustainability, and an audience that is generally more cautious in its spending – not just because of the weather. That's why it's all the more important that we show what's possible when everyone pulls in the same direction."

Politicisation

One of the most pressing issues that came to the fore this year was highlighted in the survey (page 16): that festivals are keenly feeling the increasing influence of politics.

Issues vary across Europe, but they include demands from audiences for festivals to publicly align themselves with a variety of political stances, facing calls from audiences to boycott festivals because a festival's eventual owner is rumoured to have some investments in arms sales or its sponsors are perceived as having links to companies or governments that some people disagree with.

■ Montreux Jazz Festival in Switzerland © MJF / Lionel Flusin



"Festivals create a sense of unity, of being part of something larger. This is the essence of democracy: being together but being different."

Prof. Özgehan Şenyuva

At the International Festival Forum in London in September, promoters from across Europe shared examples of political interference, targeted artist bans, and growing caution among sponsors.

Kem Lalot of France's Les Eurockéennes said the festival faced an unprecedented level of intervention this summer. A far-right politician publicly criticised artist Frisco Leon, isolating a lyric and calling for his show to be cancelled; within days, the prefect intervened and banned the concert. Lalot said: "We challenged this in the name of freedom of expression, but despite numerous appeals, the artist was unable to perform." He added that the situation raised uncomfortable questions for the wider sector: "What freedom of expression? How much confidence do we have in our youth to reflect on the works and artists presented by the festival? How much freedom does the festival have to operate?"

From Slovakia, Pohoda founder Michal Kaščák described long-term political pressure that has intensified under successive populist governments. "We are a post-communist country and run by populists. Our prime minister is speaking openly against the festival," he said. "We lost all support from the state... culture in Slovakia is not having an easy time." He noted that proposed restrictions on speech have become more common: "They were trying to say that you can't talk about political situations at cultural events because it's hate speech. In the name of banning hate speech, they are banning normal meanings."

In Hungary, Valley of Arts director Natália Oszkó-Jakab said commercial partners have become cautious about associating with festivals considered to sit on the "wrong" side of political narratives. "A bank had to cut a scene [from] Hungarian Pride from its international commercial... they told me the bank and my festival are not on the same moral grounds," she said.

At the EFC in November, the topic remained a hot one. Prof. Özgehan Şenyuva, a Turkish academic specialising in youth work and political behaviour, framed the discussion with research on why festivals have become targets for rising political tensions. He warned that political pressure on festivals is no longer confined to a handful of countries. "What we see now are not isolated cases... it's happening across the globe," he said, describing a shift from policy disputes to "an emotional campaign against certain aspects that festivals naturally represent." Festivals, he

argued, are targeted precisely because they are "temporary learning spaces" where young people explore identity, autonomy, and spontaneity – experiences ill-suited to authoritarian agendas. "Festivals create a sense of unity, of being part of something larger. This is the essence of democracy: being together but being different."

Some festivals are facing pressure from governments. In Serbia, for example, EXIT Festival came under intense pressure from the government after it publicly aligned itself with student-led anti-government protests. At the EFC, EXIT co-founder Ivan Milivojev described the extraordinary political interference: funding cuts, threats, and a licence issued just five days before the festival. Authorities told organisers privately they were "not allowed to support the students at the festival." They pressed ahead anyway, commissioning graffiti artists to recreate protest banners after officials removed them. EXIT will not return to Novi Sad in 2026 – a "strong signal to the world that we can't do the festival in Serbia until we have our country back."

The festival's co-founder and CEO, Dušan Kovačević, previously told IQ: "[When they threatened to not grant a licence], we didn't back down. I told them EXIT will happen anyway, on the streets, and then it will be chaos. I think that was when they understood that it's better for EXIT to happen as a regular festival, even with all the messages supporting the students of Serbia, than to happen on the street."

"Plus, the government ultimately understood that cancelling the festival would really be a sign that Serbia has slipped into full autocracy."

During one poignant session at the EFC, executives from Sziget, Boom, and Øya shared experiences they faced and the measures they took to protect their events, as well as sharing the toll these experiences took on their teams.

But across Europe, the summer reinforced that despite all the challenges, audiences still love festivals. From new events finding their footing to long-established brands marking milestone years, organisers repeatedly highlighted the same drivers of stability: stronger audience loyalty, greater investment in comfort and infrastructure, and a willingness to rethink formats where needed.

The pressures on the market are real, but festivals continue to evolve, attract new generations, provide vital cultural moments, create opportunities to meet people with different opinions, and bring joy to a world that can at times feel gloomy.



Pavla Slívová

Colours of Ostrava, Czechia

How was this year's festival for you?

This summer felt like a return to balance. Colours has always been about contrasts – the industrial heart of Ostrava meeting green parks, hard sound meeting deep conversation – and this year, that mix felt especially alive.

From a practical point of view, it was a successful year, though not without a little suspense. Ticket sales were slower than usual, and for a long time it looked uncertain. Then, just two or three weeks before the festival, everything turned around – demand spiked and we sold out most of our capacity. It was a relief but also a reflection of how audiences behave differently now: they wait, they choose later, and they value flexibility.

Once the gates opened, though, all the tension disappeared. The atmosphere was electric, the weather was kind, and people came with a hunger for shared experience. Seeing so many young visitors, especially around our Fresh Stage, gave us a sense that a new generation is truly taking Colours as their own.

What challenges do you think the industry is facing [from your job perspective], and how are you aiming to resolve them at Colours of Ostrava?

The same as everywhere: rising costs and a more unpredictable audience. But we've learned that growth doesn't always mean going bigger – it means going deeper. Rather than focusing only on headline names, we invest in the overall experience and in our community.

Of course, people still often want the most familiar names, and going your own, more adventurous way has become harder than it was ten years ago. But that's exactly why we do it – because audiences also appreciate when you trust them with something unexpected.

One example is our under-21 ticket programme, which helps younger people to access the festival for the first time. We're also paying much more attention to mental health, both for visitors and for our own team, because the constant race for "more" can easily turn into burnout. Through programming, partnerships, and the atmosphere we try to create, we want Colours to remain a space where people recharge, not one more place where they run out of energy.

Can you tell us about Colours Without Barriers; why the festival feels it's important and the results you're seeing?

Colours Without Barriers has become one of the most defining parts of who we are. It started with a simple goal – to make sure people with disabilities can experience the same freedom and excitement as anyone else – but it's grown into something wider. Now we have hundreds of guests each year coming through the programme, plus improved accessibility across the site, trained staff, and a visible culture of inclusion. We're proud that other festivals in the region are now following suit. It's a reminder that inclusion isn't an add-on; it's good design, full stop.

In what ways have you seen European festivals influence global festival culture?

European festivals have always been more than entertainment; they're social laboratories and platforms where ideas and creativity circulate freely. You can see it in how topics like sustainability, gender balance, and accessibility started here and gradually shaped the global conversation. The European model tends to treat audiences as citizens, not consumers, which we find inspiring.

At Colours, we keep that spirit alive through our Meltingpot Forum – a conference running alongside the festival under the motto "ideas without borders." It brings together voices from health, politics, economy, education, and culture in general, creating a platform for exchange that goes far beyond music. It's about curiosity, dialogue, and understanding – the same values that make the European festival scene unique.

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

Festivals are one of the last true meeting points. They cut across generations, backgrounds, and beliefs – and for a few days, you get a glimpse of how society could work if we listened more and feared less. In our region, especially, festivals fill a gap between art, activism, and community. They can help build empathy and perspective, which are in short supply these days. So, while we're proud of our stages and headliners, what matters most is the feeling people carry home – that connection doesn't have to be rare.



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2025

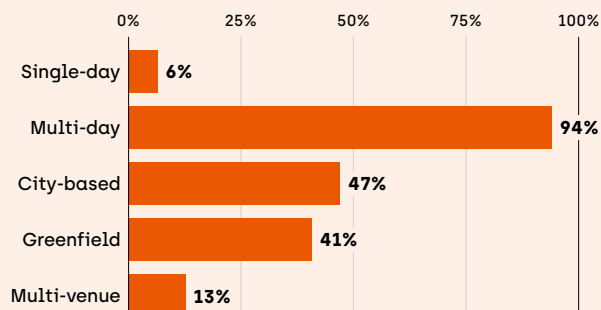
Our annual survey of hundreds of festival organisers from across the continent reveals how festivals are performing.

Since 2022, we've been checking in with festivals across Europe through an annual survey that tracks the health of the sector. Over that time, we've been monitoring everything from ticket sales and pricing trends to shifting concerns around production costs, sustainability, and audience behaviour.

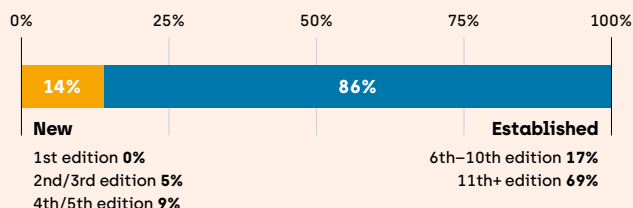
This year, 223 festivals completed the survey. The vast majority identify as multi-day events (94%), with only a handful running for a single day. Almost half (47%) take place in cities, 41% operate on greenfield sites, and 13% spread their programmes across multiple venues.

To understand how different parts of the market are experiencing the current landscape, we've again divided festivals into three capacity groups. Small festivals are those with 10,000 attendees or fewer, accounting for 34% of respondents; medium-sized festivals sit between 10,001 and 30,000 capacity (40% of respondents); and large festivals – anything above 30,001 – make up the remaining 27%.

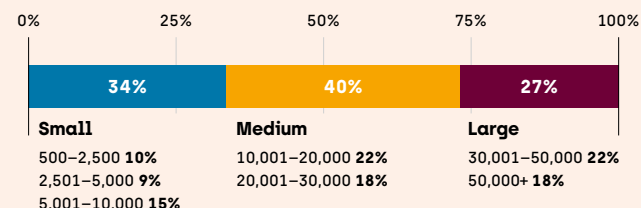
01 Which of these describe your festival?



02 Which edition of your festival took place in 2025?



03 What size is your festival?



Key findings



5.6%
average
increase of
ticket prices



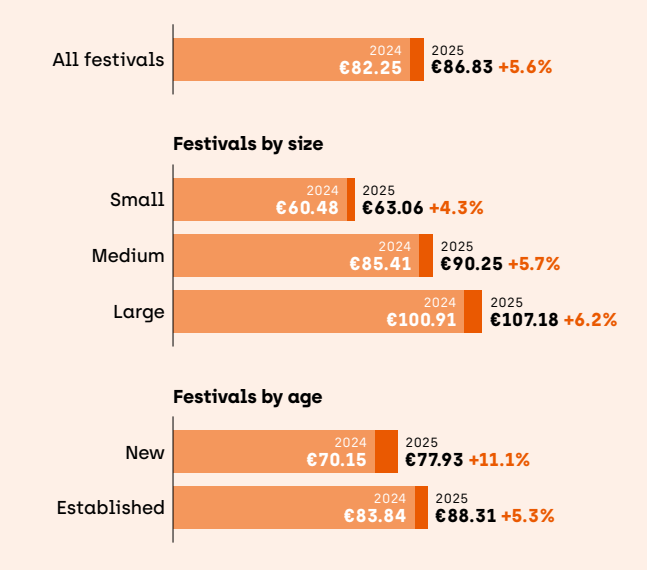
€203.21
average
whole event
ticket price

53%
of festivals reported
their sales were better
than last year

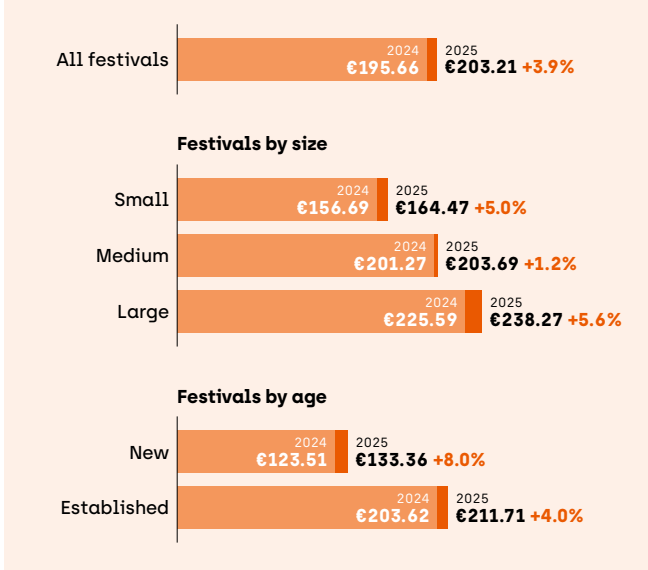
19%
of festivals
have been hit by
boycott calls

17%
of festivals
sold out

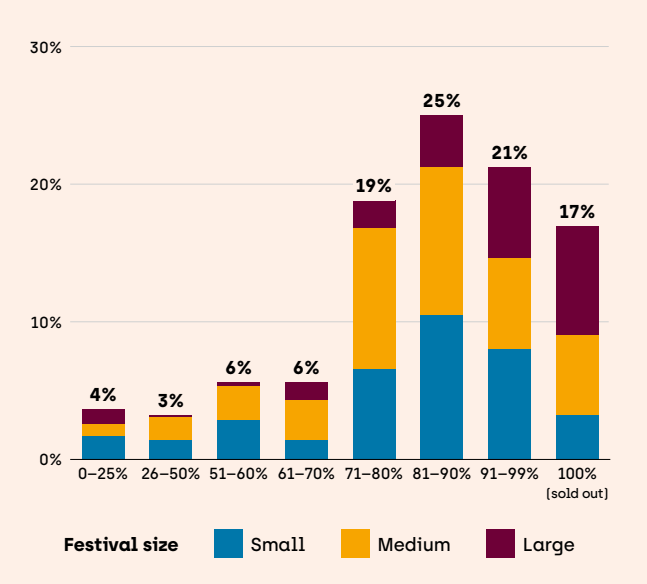
04 Average single-day ticket price – 2024 vs 2025



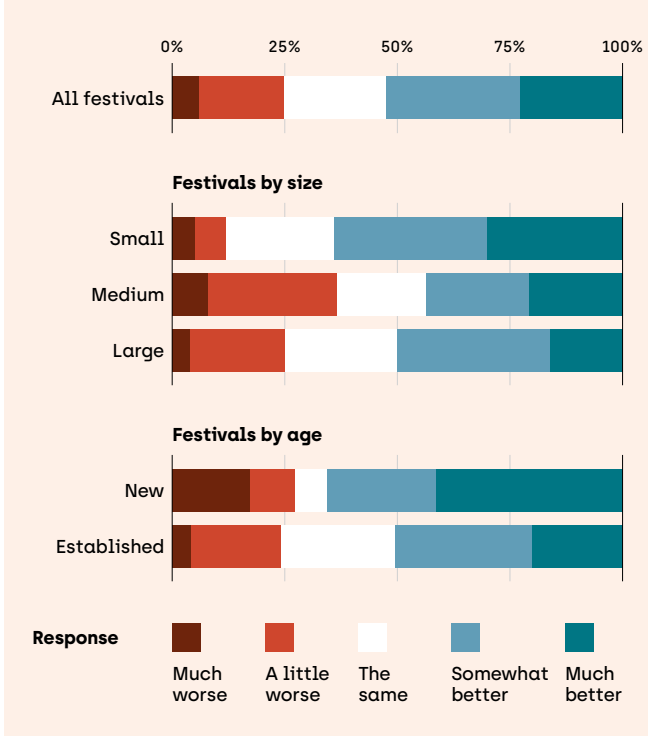
05 Average whole-event ticket price – 2024 vs 2025



06 How close to being sold out was your festival this year?



07 How did your sales compare with 2024?



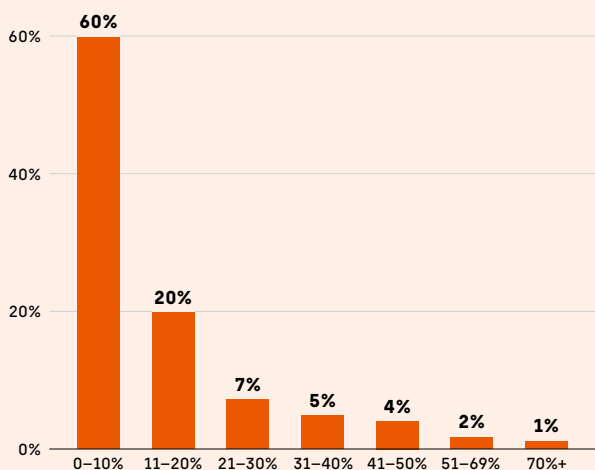
Ticket sales

On the key question of "How did ticket sales compare with 2024?", 53% say "better" (30% somewhat, 23% much better), 23% "about the same," and 25% "worse." So directionally, more positive than negative.

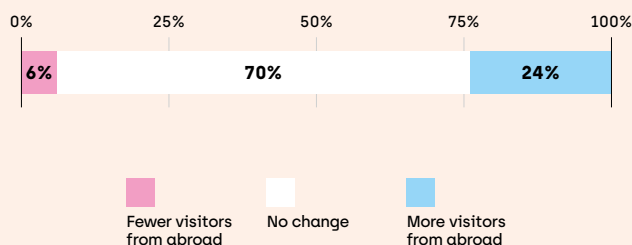
But dig into the detail and the nuance appears. Across the full sample, just 17% said they fully sold out, and some 63% sold over 80% of their tickets, which is healthy but down on last year's exceptionally strong "over 80% sold" cohort.

Larger festivals continue to enjoy a structural advantage: 32% of large events sold out versus 14% of mid-size and 9% of small events. At times when consumer wallets are constrained, the familiar "safe bet" – big brands with big headliners – has a powerful effect. Much as we see across the entire live industry.

08 What proportion of your audience is international?



09 Was there a change in this visitor group this year?



The "age effect"

Exploring this issue in more depth, we analysed sales performance by age of festival to understand if younger festivals (those which have been running for five years or less) were having greater difficulties than more established events.

The results show "new" festivals show more volatility at both ends: they reported a higher "much better" sales performance share than average (41%), but also a considerably higher "much worse" (17%). Established festivals (5+ years) are steadier: 20% said their sales were "much better" than last year, 4% "much worse," and 25% "same." In other words, brand familiarity among consumers has a cushioning effect, but strong growth still occurs at the younger end – it's just riskier.

Across the board, ticket prices moved up again, but younger festivals carried the steeper hikes. The average price of a day ticket to a new festival rose 11.1% to €77.93 and 8% to €133.36 for a full-event ticket, while at more established festivals, day tickets rose around 5% to €88.31 and whole-event passes rose 4% to €211.71.

That pattern suggests that newer events are still finding sustainable price points that cover their costs, and that older brands, already with higher ticket prices than newer events, introduced smaller rises. However, although newer festivals show sharper percentage rises, their lower starting prices mean those increases are less likely to deter audiences.

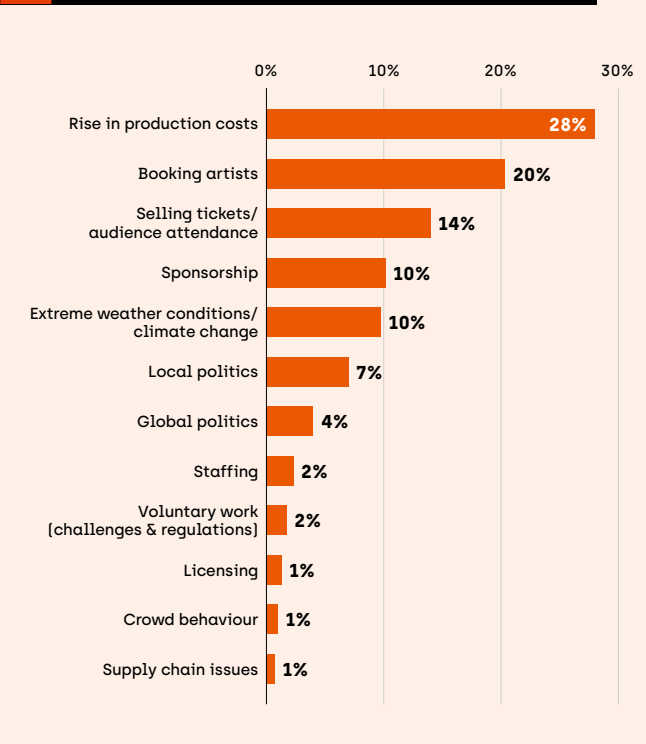
Breaking down price rises by size also offers some interesting insights. Small festivals raised tickets carefully (by around 4% on average for day tickets and 5% for whole-event passes); medium-sized festivals pushed day tickets harder than weekends (day tickets increased by an average of 6%; whole-event passes by around 1%); and at the biggest events, day ticket prices rose around 6% to €107.17, while whole-event tickets cost on average €238.27 – up nearly 6%.

Across the whole sample, the average day ticket increased 5.8% to €86.83 and nearly 4% for whole-event tickets to €203.21 – these rises are broadly in line with European inflation, showing many festival are using targeted micro-rises, cutting costs, or finding alternative revenue streams rather than increase ticket prices. However, all festivals say their costs have increased significantly more than inflation, highlighting the huge pressure festival budgets are under at the moment.

Audiences

When it comes to international visitors to festivals, 80% of festivals draw less than 20% of their audience from outside their home country. For 2026 planning, the message seems to be don't bank on a tourism bounce to save the budget; wins will come from local conversion and upsell.

10 What are the current challenges facing festivals?



Challenges

We also asked respondents about the top challenges they faced in 2025. Many of the pressures visible in last year's report have persisted this year, with little sign of easing.

Rise in production costs remain the most significant challenge faced by festivals of all sizes, consistently topping the list of concerns in the survey. Promoters across Europe continue to report that the price of staging events – from infrastructure and labour to technical services – has increased faster than they can comfortably pass on to audiences.

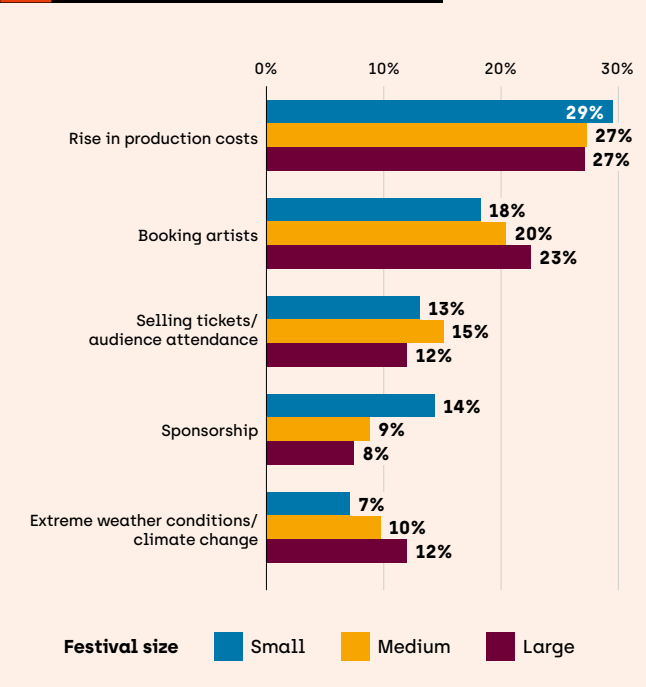
Booking artists follows closely behind, with respondents citing both high fees and limited availability as ongoing difficulties. This mirrors the picture in 2024, where competition from stadium and arena shows made securing headline acts more complex and pushed festivals toward rethinking who they programme and how much they can spend.

Selling tickets is the third major concern. Although overall sales directions remain positive (see earlier analysis), the fact this remains a key concern reflects that promoters continue to be worried that demand cannot be taken for granted.

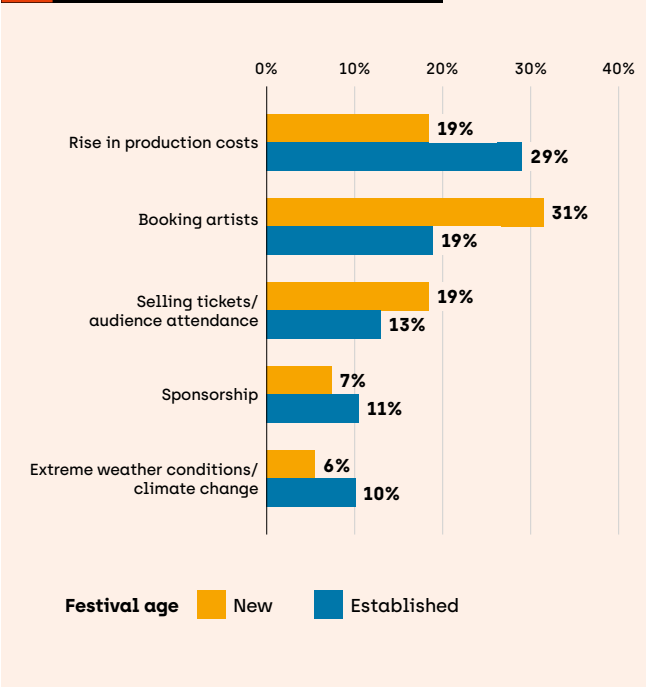
Extreme weather appears again as another significant challenge. After a year that saw several European festivals disrupted by storms, heatwaves, and heavy rainfall, many organisers now see climate-related risks as a recurring factor rather than an occasional obstacle.

But a closer look at the responses reveals meaningful differences between newer festivals (five years old and under) and long-established events.

11 Current challenges by festival size



12 Current challenges by festival age



For newer festivals, *booking artists* is the single biggest challenge, cited by 31% of respondents. That is significantly higher than among established festivals [19%], suggesting that newer events face a tougher fight for talent. Rising production costs come next for these newer events [19%], followed by selling tickets and audience attendance [19%]. Sponsorship, extreme weather, and local politics appear further down the list but are still present at notable levels.

Established festivals report a different order. For them, *rises in production costs* clearly dominate, with 29% naming it their most significant challenge. Booking artists sits second (19%), followed by selling tickets (13%). *Extreme weather* is a greater concern among established festivals (10%, versus 6% for new), and *sponsorship* also features more prominently at 11%.

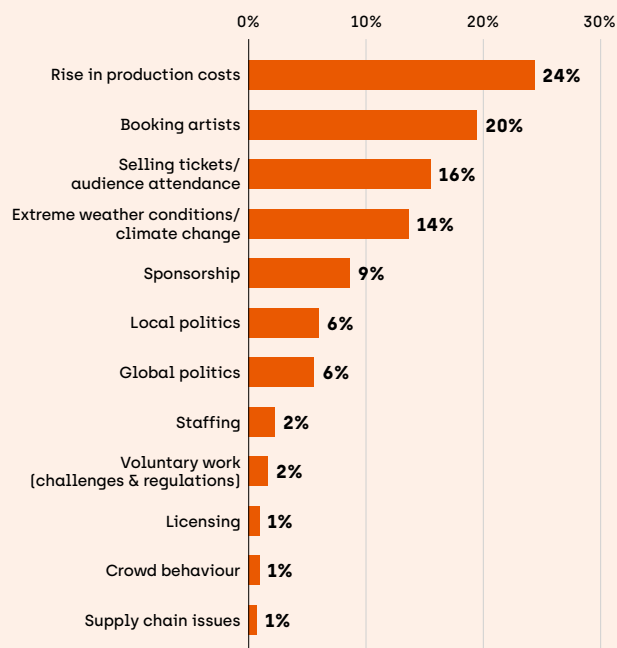
The data suggests that newer festivals are the ones feeling the most acute pressure in the booking hierarchy. For established festivals, the primary struggle is absorbing continued cost inflation, reflecting their larger infrastructures, higher baseline expenses, and more complex productions.

The future

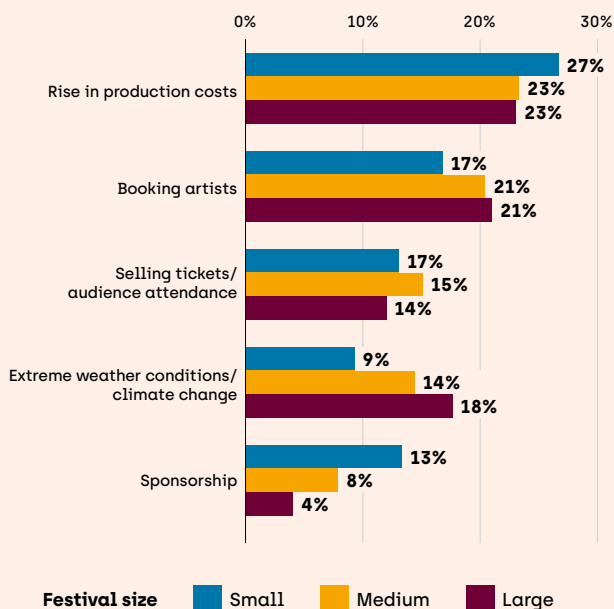
Looking ahead, festival organisers anticipate a similar set of pressures shaping their 2026 seasons. *Rises in production costs* remain the primary future worry, followed by *booking artists/audience attendance* – almost identical to the concerns reported for 2025. It's clear that these are now structural issues that festivals expect to contend with for the foreseeable future.

Weather also features strongly in future concerns. The

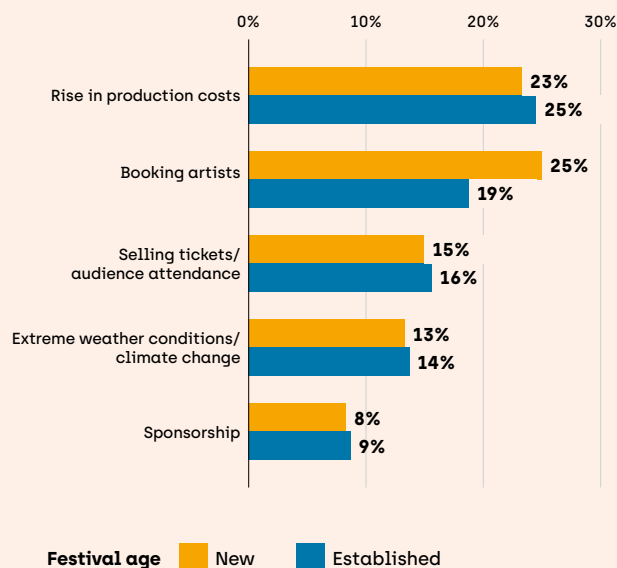
13 Future concerns



14 Future concerns by festival size



15 Future concerns by festival age



increasing frequency of climate-related disruptions has elevated *extreme weather* from a secondary worry to a prominent long-term consideration. Promoters increasingly recognise that planning for unpredictable conditions is becoming an essential part of running events in Europe.

The divide between newer and more established festivals also becomes apparent for future worries. While both groups anticipate the same pressures into 2026, the weighting of those concerns reveals distinct strategic anxieties.

For newer festivals, the main future worry remains *booking artists*, cited by 31% of respondents. *Rises in production costs* follow closely, with 19% selecting this as their top long-term concern. *Selling tickets* sits at 19%, again reflecting the volatility that characterises newer events across multiple sections of this year's survey.

In contrast, established festivals overwhelmingly cite *rises in production costs* as their biggest future concern, with 29% selecting it – ten points higher than among newer events. *Booking artists* is the second-largest future concern

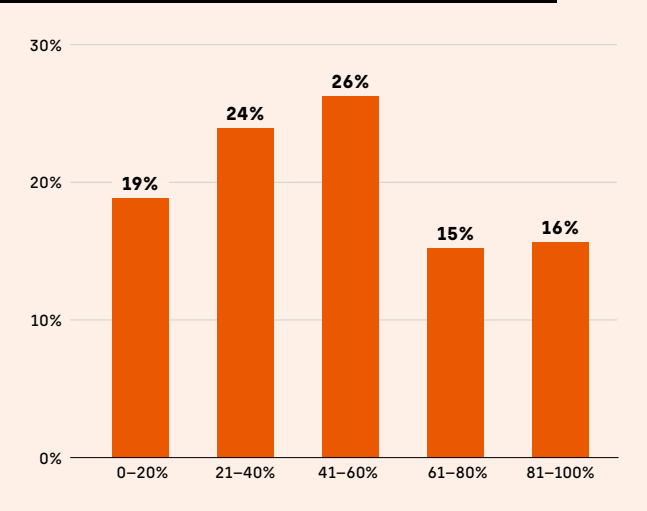
[19%] but far less dominant than for new festivals. *Selling tickets* sits third [15%], similar to the current challenge ranking.

Established events also show higher future concern around *extreme weather* (10%) and *global or local politics*, suggesting that broader environmental and regulatory risks weigh more heavily on events with larger infrastructures and greater public visibility.

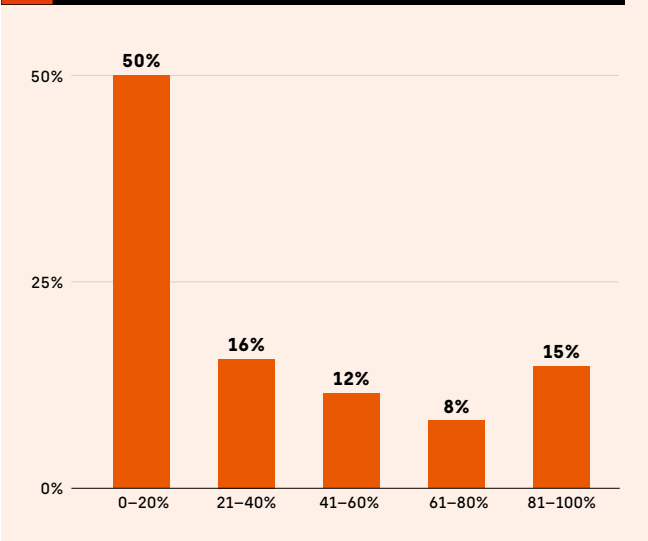
Lineups

This year's data highlights a trend that's been noticeable since the pandemic – a move toward more domestic acts across almost every festival size. The bigger the event, the more likely its top acts hail from home soil. Among large festivals, 58% reported that fewer than one in five of their headliners came from abroad and just 5% said that international artists made up more than 80% of their top billing. The pattern continues for mid-size festivals, where

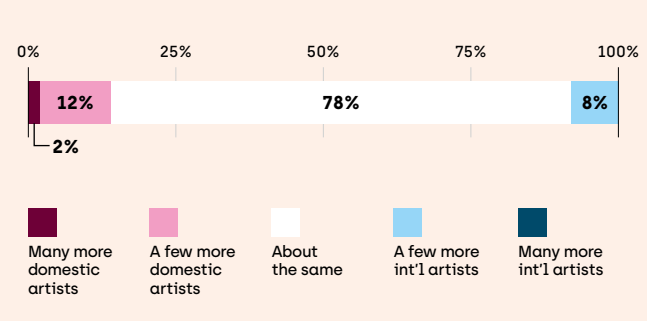
16 What percentage of your lineup was domestic artists?



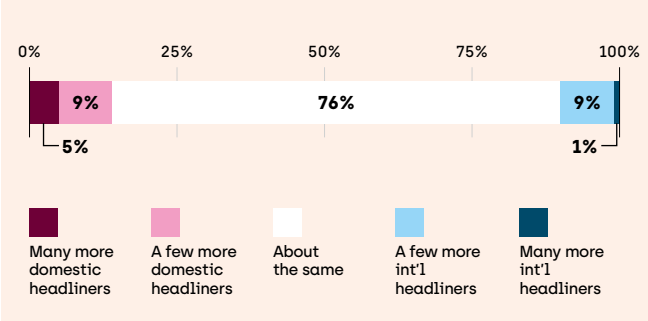
17 How many of your headline acts were international?



18 How many more international/domestic artists did your lineup feature compared to last year?



19 How many more international/domestic headliners did you have compared to last year?



53% of festivals said their headline acts were at least 80% domestic and only 14% featured majority-international lineups.

The only real outlier is at the smaller end of the scale. Around 22% of small festivals said that more than 80% of their headliners were international – roughly four times the proportion of large events. These tend to be boutique or genre-specific festivals whose curatorial edge depends on importing talent that simply doesn't exist locally. Even then, the overall picture is one of localisation: almost four in ten small festivals still booked fewer than 20% of their headliners from abroad.

At a time when international touring remains expensive and artist fees have risen alongside production costs, domestic artists can be comparatively less expensive than international acts. Coupled with the boom in many countries' domestic scenes owing to restricted touring during the aftermath of the pandemic, when local talent could tour with fewer restrictions – winning audiences as a result – we see the results of this trend across Europe. Big festivals can still afford the top global names but are increasingly anchoring their bills with national stars capable of selling out stadiums at home. Mid-sized events, meanwhile, often rely on one or two imported headliners surrounded by domestic acts. Smaller festivals are less likely to be booking the truly global megastars and therefore are able to have more less-famous international acts on their lineups.

The data seems to highlight a wider trend: European festivals are becoming more regional in both lineup and audience composition. Most fans are still travelling locally rather than internationally, and only a minority of festivals see significant foreign attendance. In 2025, the global glamour of festival headliners hasn't disappeared – it's simply concentrated at the very top, while everywhere else, the story is one of localisation, pragmatism, and finding identity closer to home.

Boycotts: A Growing Pressure Point

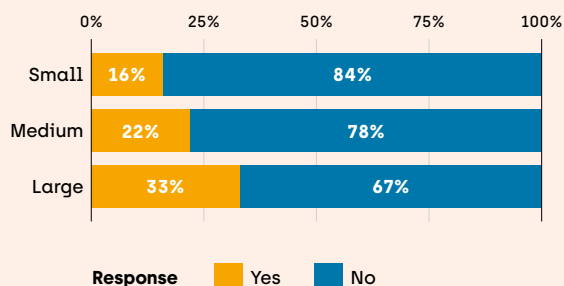
A new question this year asked festivals whether they had faced calls for boycotts – an issue that has increasingly surfaced in European media, particularly around sponsor-linked criticism and the protests targeting Superstruct festivals over accusations the firm's owner KKR has investments in Israel.

Across all respondents, 19% of festivals said they had been the target of some form of boycott. But segment the numbers by size and a different story appears.

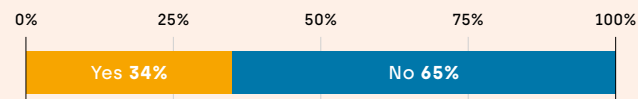
Smaller events were the least affected, with 16% reporting boycotts; mid-size events saw a noticeable jump, with 22% reporting boycotts; and 33% of larger events were subject to boycotts – nearly double the small-event group.

This pattern aligns with the broader trend of cultural activism increasingly targeting high-visibility, high-investment events. Larger festivals sit at the intersection of global finance, political discourse, and mass audiences, making them more exposed to reputational campaigns, whether related to ownership structures, brand partners, environmental concerns, or geopolitical positions.

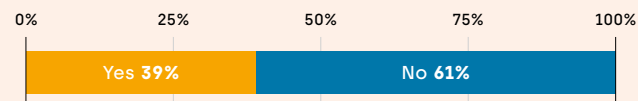
20 Have you faced calls to boycott your festival?



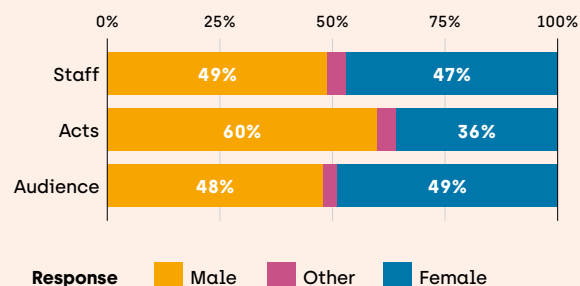
21 Did you make any significant changes to your festival this year?



22 Have you committed to a green festival standard or certification?



23 What was the gender balance at your festival?





From fields to the world stage

■ Clockenflap in Hong Kong

From Chile to Hong Kong, European events have had a major influence on global festival culture. But it's not just a one-way street – as knowledge exchange on a planetary scale is key to the industry's success. **James Drury reports.**

The USA may have given birth to the modern-day music festival, but it was Europe that picked up the baton and really ran with it. From Montreux Jazz Festival in 1967 to the Isle of Wight Festival in 1969, Pinkpop (NL) and Glastonbury (UK) a year later, music lovers across the continent embraced the concept with gusto.

And for many years, while the format fell out of fashion in the US, Europe's festival scene grew and grew. Today, some of the longest-running events are held in Europe, and over the decades, they've honed the experience to become an influence on the now-exploding festival culture globally.

From Asia to the Middle East, South America to Australia, festivals have sprung up, with many events acknowledging the influence of their European counterparts – while bringing their own local approaches.

Hong Kong's Clockenflap is one of many newer festivals that looked to Europe when drawing up its blueprint. "I would say that European festivals have had a tremendous influence on the rest of the world and have very much led

the way in terms of establishing norms and setting expectations that elsewhere have followed," says co-founder Justin Sweeting. "For Asia, festival culture is so [...] new compared to the West that we've sought to learn as many best practices as we can from these well-established events.

"Conceptionally and experientially, Glastonbury was a major influence for my fellow co-founders and me – certainly in spirit if not in scale," he adds. "I learned a lot from time spent at a myriad of boutique festivals that were coming up at the turn of the century, including Truck Festival in the UK, as well as larger mainstays like Roskilde, Pukkelpop, Lowlands, and Printemps de Bourges. I'd also say we have taken inspiration from festivals like Primavera and Slottsfjell, who so seamlessly meld their industry pro components within their events."

That blend of boutique spirit and bold curation is something that resonates strongly in South America, too.

Chilean promoter Carmen Barahona, founder of Festival

En Órbita, says: "[UK festival] ATP [All Tomorrow's Parties] was the inspiration for my festival – a mixture between ATP and Primavera Sound," she says. "ATP because of the romantic vibe that highlighted the connection between artists and people – it was like a real, direct conversation."

She adds that Primavera Sound's evolution also shaped the South American scene:

"I was a big fan of the vision Primavera Sound developed – a group of friends that love music started doing small shows that got bigger and bigger, and now they have this amazing monster. In terms of curatorship, I think they managed to keep faithful to their ideals – you have to amplify your vision, and you have to include the pop bands and the trap [artists]."

Her comments highlight how European festivals, particularly Spanish ones, became reference points in Latin America: "Many people in Chile love them. And the local industry, the Latin festivals, are inspired by them."

For the New Orleans Jazz & Heritage Festival's president/COO Eugenié "EJ" Encalarde, the roots of that relationship with Europe go right back to [jazz promoter] George Wein. "The exchange between American and European festivals has always been generative, and it's evolved in interesting ways," she says. "George Wein intuitively understood this back when he started the Newport Jazz Festival in 1954 and brought that thinking to New Orleans in 1970. He'd seen how European festivals created these multi-day cultural events that became institutions, not just concert series. That DNA – the idea that festivals can be economically vital and culturally essential – shaped how we think about the New Orleans Jazz & Heritage Festival presented by Shell."

For many organisers, the influence has been as much about how festivals are run as how they feel. Sweeting says the European model helped Clocquenflap build higher standards at a time when the local ecosystem was still emerging. "Early in our existence, we recognised there were

gaps with locally available skills and infrastructure when it came to festivals," he explains. "So we leaned in on staffing resources from Europe – bringing in production crew from Italy, backstage artist/industry liaison folks from the UK, and a general ethos in play that we'll recruit experts from overseas to help us train local team members for the long term."

"We also made a conscious decision to hold ourselves accountable to a higher international standard than was technically required of us locally. Members of our team went to Europe to earn their Level 5 Crowd Science diplomas, for example. Likewise, we bring our stages over from Germany [Megaforce], so we can present a different level of show than others can here, and have made use of other readymade festival solutions, including accreditation systems originally from Spain [PlayPass]. We're always looking to improve and push the local event scene forward, and making the most of the lessons learned in more developed festival markets like Europe can only help us fast-track these efforts."

In Australia, Untold Group's Filippo Palermo also points to European festivals as an important reference point – especially when it comes to what can be built. "European festivals have had a huge impact on festivals globally, especially in Australia," he says. "One of the most striking differences we've noticed is in the permitting process and what's possible within festival builds. In many parts of Europe, the regulations are more relaxed and supportive of creativity and innovation."

"There's also an incredible diversity of festivals across Europe. From massive, long-established events to intimate boutique gatherings, each brings its own unique character. Europe has set the global standard for how immersive, distinctive, and community-driven festivals can be. A great example of direct inspiration for us is Beyond The Valley's Dance Dome, which was born from ideas and production



■ UNTOLD festival in Dubai

"The most resilient festivals understand they're not just producing entertainment – they're stewarding culture"

Eugenié "EJ" Encalarde
New Orleans Jazz & Heritage Festival

styles we encountered at European festivals."

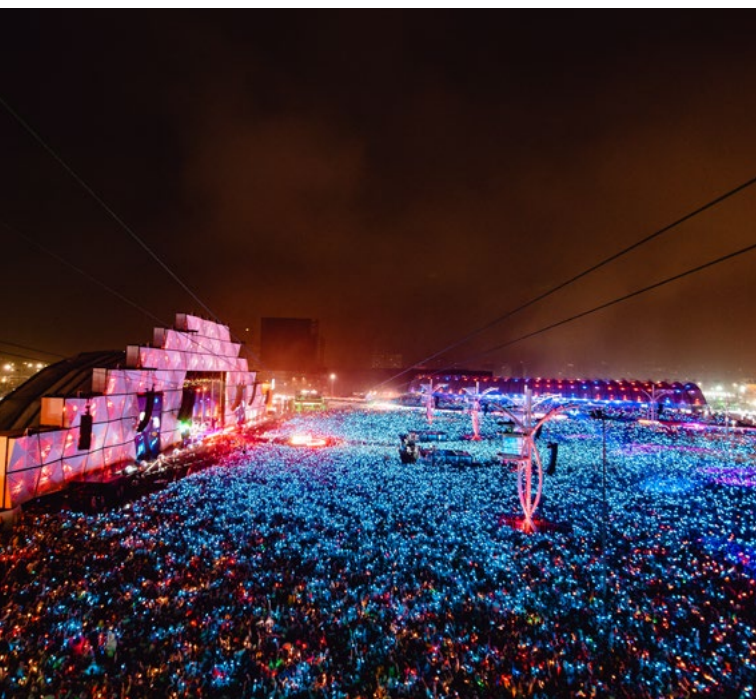
That diversity is key. It offers a set of examples other markets can cherry pick from and adapt, rather than a single template to copy.

Over time, the relationship between Europe and the rest of the world has evolved into one of sharing knowledge. "Places like Glastonbury, Roskilde, and Primavera Sound showed festivals can be cultural infrastructure, not just entertainment," says Encalarde. "Different economic models, deeper community investment, and people staying loyal across generations. The philosophy resonates with how Jazz Fest operates."

Brazilian-born global brand Rock in Rio has experienced the exchange from another angle. Its European journey started when the festival arrived in Lisbon in the mid-2000s. "When we came to Lisbon for the first time, all we found in Portugal and Madrid were [festivals that were very nice but traditional]," recalls executive vice-president Roberta Medina. "There was little investment in infrastructure, and the music genres were very similar."

Rock in Rio brought a different approach. "We came with a very structured way of building it," she says. "We made huge investment in scenography, music, and infrastructure."

In Lisbon, that translated into broad demographics and a push for brands to go beyond simple logo placement. "Because of the infrastructure, older people and younger children came, because people felt safe and older people want a nice restroom, cold beer, no long queues, and so on," Medina says. "We came to Portugal trying to do something a little bit different than the last edition in Brazil. We wanted brands to be not only present with their names but part of the experience. We decided to test that [in Lisbon], and it worked very well – brands were present but interacting with people, being part of what we call a theme park of music."



■ Coldplay perform at Rock in Rio in 2022

Crucially, the flow of ideas did not stop at Europe's borders. "After a few years, we went back to Brazil in 2011, and the sponsors had been to Lisbon to see what we were doing there," she explains. "They learned, and they took the ideas to Brazil. When we did Rock in Rio again in 2011 in Brazil, it was a very different event. We changed the whole way of doing events in terms of how brands are present and experienced inside the event."

For Medina, that back-and-forth is the point. "What I see is that there is a lot of learning, because we have been doing the event in both countries," she says. "We experience things in Brazil and bring them to Portugal, and then we experience things in Portugal and take them to Brazil. It happens all the time."

The philosophical exchange goes beyond show design and sponsorship. Encalarde notes that European debates about festivals as "cultural heritage" – such as the process around Paredes de Coura festival's heritage designation in Portugal – have influenced how she thinks about Jazz Fest's role at home.

"That conversation crystallised something I've observed across my work with festivals globally: the most resilient festivals understand they're not just producing entertainment – they're stewarding culture," she says. "The European framework for understanding festivals as cultural heritage has profoundly influenced how we think about Jazz Fest's role. European festivals like Glastonbury and Roskilde demonstrated that when you position a festival as cultural infrastructure, not entertainment product, you unlock different economic models, deeper community investment, and multi-generational loyalty."

And she is clear that Europe is learning from elsewhere. "The exchange isn't one-directional – American festivals have pioneered concepts that have influenced the global market," she says, pointing to accessibility models, programming that embraces multicultural audiences and pricing architectures that create multiple entry points without losing financial sustainability. "Nobody has the formula figured out completely. The festival market is teaching lessons about sustainability, authenticity, adaptation. Festivals thriving are the ones staying curious, connected, remembering we're not just filling venues – we're creating experiences that matter to communities."

That curiosity is increasingly formalised through international forums. Encalarde highlights the European Festival Summit and YEUROPE's Future of Festivals exchange as examples of how organisers from different continents are working together. "The 2024 European Festival Summit and the Future of Festivals exchange demonstrated something crucial: our challenges don't respect borders, and isolated responses don't work," she says. "Two hundred festival leaders from over 20 countries discussing extreme weather prep, sustainability, and maintaining fan loyalty in uncertain markets. We weren't protecting secrets; we were acknowledging these challenges affect everyone."

That sentiment is echoed in Asia and Australia. "I highly value and appreciate the camaraderie and community when speaking to other festival organisers globally," says Sweeting. "Whilst of course there will be local nuances at play, I typically find there are more areas of shared

Taking Tomorrowland global



■ Tomorrowland Brasil © Tomorrowland

Tomorrowland is one of the most prominent examples of a European event that has taken its identity into different regions while deliberately localising how it works.

The Belgian festival's international journey began not with a grand expansion plan but with demand. "When the founders started the festival in Belgium, they were not thinking of having festivals all over the world," says spokesperson Debby Wilmsen. "Our after movie got distributed, more people came, and then the idea emerged: can we have festivals somewhere else so people further away can also attend the festival?"

Expansion is deliberate and slow. Wilmsen says it often takes "four or five years" to find the right local partner, landscape, and infrastructure. The potential site must be able to host Tomorrowland's towering main stage, offer a setting with "the same sparkle as Belgium – a little nature, maybe water," and sit near airports and hotels so artists and fans can travel easily.

Brazil was the first major step, chosen because it already had one of the world's largest Tomorrowland fan communities.

This year, it also expanded into China for the first time, taking its full experience indoors at the new Hero-Dome in Shanghai for The Magic of Tomorrowland.

Alongside its flagship events, the company also operates CORE festivals – smaller, boutique-style events with two or three stages – which are far easier to tour than the full Tomorrowland production. CORE events have now appeared in Colombia, LA, and Australia. "Tomorrowland is a difficult project to move... CORE is more niche and easier," explains Wilmsen.

A defining part of the Tomorrowland model is its reliance on local teams. In Brazil, the festival's director, Mario Sergio de Albuquerque, has been embedded in the market for years. "He knows the DNA of Tomorrowland, but he's Brazilian – he knows the culture, the rules, how it works," Wilmsen says. Belgian crews ship the core stage architecture to the South American country but "most things are developed there," from fashion and decor to food and beverage. Suppliers regularly train in Belgium before returning home to build locally. For example, the famous Belgian fries are made by a Brazilian caterer, who learns the techniques in Belgium before returning home to prepare them onsite.

The learning is reciprocal. Tomorrowland has adopted accessibility practices inspired by Brazil, and French safety documentation standards have been incorporated into the Belgian event. "You have to be open-minded and understand why things work in that market – and maybe adapt," says Wilmsen.

similarities between us. So, it makes perfect logical sense for us all to draw from, and learn from, each other's experiences, and especially solutions. We proactively look to share knowledge with others and gratefully receive what we can externally whenever we can."

South America's role – particularly the boutique, exploratory, artist-centric spirit Barahona describes – demonstrates that inspiration flows in every direction.

For her, experimentation, openness, and cross-border learning are essential:

"I think that's something that we could learn – to have a more open mind," she says. "As promoters, we're always

looking – always window shopping international festivals to evaluate bringing elements of them here."

Palermo puts it even more bluntly. "Knowledge exchange is absolutely paramount for collective growth," he says. "Learning from each other, across borders, genres, and scales, not only improves individual festivals but also strengthens the entire industry. The more open we are with knowledge and experience, the more creative, safe, and sustainable the festival landscape becomes for everyone."

But it's not just festivals looking to European events that's having an impact on global culture. Some festivals are taking their events into new markets. Among the brands





Christof Huber

OpenAir St. Gallen, Switzerland

How was this year's festival season for your events?

Overall, it was a solid season, but production costs and booking were not as easy as in previous years. We had an extraordinary edition at OpenAir St. Gallen, with fantastic weather, great atmosphere, and an emotional highlight with the surprise appearance of Lewis Capaldi, but we were not sold out after three sold-out editions. Summerdays and Seaside were recording-breaking editions. Unique Moments and Stars in Town were solid, but not ideal due to rather rainy weather.

What challenges do you think the industry is facing, and how are you solving them for your organisation?

We promote mainly midsize and smaller festivals, and it's tougher to secure decent headliners for these events within a certain budget. Shorter tours at larger events with high budgets, and headline business are the reasons for this. We will work hard to produce the events within our budgets, but increasing costs are a problem. Our main goal is not to increase ticket prices again, especially for the younger audiences.

What trends do you see shaping festivals in the future?

One-day dance events with capacities between 1,000 and 5,000 with electronic lineups are very popular in Switzerland.

Several labels and brands produce these events with a limited production and rather low ticket prices. They are quite flexible, producing these events in parks, industry locations, or at a lake, and they are very popular for a young audience. I think we will see even more of these one-day events – and at larger scale – in the future.

In what ways have you seen European festivals influence global festival culture?

If we look at festivals like Roskilde, EXIT, or Sziget, they [are] cultural melting pots and not just music events. It's a gathering of young people from the whole world, and they play a very active social role with their activities for dialogue. It's about freedom, diversity, and exchange. The European festivals have a huge tradition and work closely together within our association, EUROPE.

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

They should play a brave role in our society. Festivals are the perfect place to discover the full diversity of cultures and are a meeting place to exchange ideas. We have to be strong, united, and brave so that we can keep on presenting the programmes without limitations.

■ OpenAir St. Gallen © Michael Dornbierer



Festivals on the political frontline

From boycotts to artist bans, social media storms to subsidy withdrawals, festivals are now frequently finding themselves facing pressure from an increasingly political world. James Drury finds out how they're coping.

This summer, one of the most prominent challenges facing Europe's festivals came from the changing political landscape they find themselves in. Promoters are increasingly caught between competing political forces, activist campaigns, and public expectations about where they should stand on issues. From boycotts and artist bans to social media storms and subsidy withdrawals, the season has highlighted how exposed live events have become in a deeply polarised world.

So how can promoters navigate the political climate?

At this year's International Festival Forum (IFF) in September, festival organisers shared accounts of the pressures they've faced and the strategies they're using to overcome them.

In France, Les Eurockéennes de Belfort found itself at the centre of a freedom-of-expression storm when three artists came under political attack. Programmer Kem Lalot recalled that when the appearance of hip-hop artist Freeze Leon was announced, "a far-right deputy isolated two lines from his songs and, in the name of antisemitism, called for a ban. It was the artist who was attacked first, not the festival." Despite appeals, the local government prohibited the performance just two days before showtime.

The local authorities also tried to ban Irish rap group Kneecap, but after receiving counter arguments from the band, they were allowed to perform.

It was a small victory for the act, who faced some of the most high-profile difficulties of the season: they were banned from performing at Hungary's Sziget and dropped from lineups at Scotland's TRNSMT, the UK's Eden Sessions, and Germany's Hurricane and Southside festivals.

In Hungary, the government prevented the band from entering the country, citing "national security" concerns, accusing the group of antisemitism and "glorifying terror" – claims the band deny. Sziget organisers called the move "unprecedented," warning it could damage Hungary's international reputation.

"Cancel culture and cultural boycotts are not the solution," said the festival in a statement. "Our values mean we condemn hate speech while guaranteeing the

fundamental right to artistic freedom of expression. Over the past 30 years, Sziget has served as a free and safe place for different cultures. We fear this decision may not only damage the reputation of Sziget but also negatively affect Hungary's standing worldwide."

The incident followed months of escalating pressure. More than 150 Hungarian artists had signed an open letter urging Sziget to drop the band, while the state secretary for international communication, Zoltán Kovács, announced Kneecap were "officially banned from entering Hungary."

In France, by contrast, Rock en Seine kept Kneecap on its 2025 bill despite objections from Jewish organisations and local politicians. But it paid a price. The local municipality subsequently withdrew €40,000 in funding, about 3% of the event's budget, stating: "We subsidise cultural initiatives, not political ones."

Rock en Seine director Arnaud Meersseman told *IQ* earlier in the year: "We hope it's a bump in the road; this will not sour our long relationship with the municipality. What we will defend, though, is freedom of speech. We don't feel we need to intervene in who says what. We're here for culture and for fans to come and enjoy what they're seeing."

Elsewhere in Europe, such conflicts are more familiar. Michal Kaščák, founder of Slovakia's Pohoda Festival, has spent years navigating state hostility. "We are used to it," he told IFF.

He went on to say that his team had already lost state funding but refused to dilute their message. "If you want the joy of life, not only at the festival but during your normal life, you must have a free society," he said.

In Hungary, Natália Oszkó-Jakab, director of the Valley of Arts Festival, echoed that sentiment. "When I took over, we were 100% government-funded," she told IFF. "A strong business plan gives you freedom, so we built community support instead. Within 15 years, we reduced state support to 15%, and we're ready to lose that too if needed."

The conversation remained a crucial topic at the European Festival Conference in November. Many panels included accounts of people calling for boycotts, political intimidation, and more [see page 42].



■ Kneecap faced bans in many countries but performed at Øya Festival in 2025 © Øystein Kind

But this isn't an issue solely for 2025. In Spain, Periferias festival was shut down in 2023 after 23 years when a right-wing political party forced the city council to withdraw funding. Festival organiser Luis Lles tells us: "The arrival of Vox [the extreme right] to Spanish politics has been horrible. They are enemies of culture. And when they have some power, they cancel anything they consider progressive. In 2023, the Popular Party [PP] was the major force in Huesca [where Periferias took place], but they needed the support of Vox. Vox told the PP they would not have their support if they didn't cancel Periferias, because for Vox, the festival is a 'nest of reds, lefties, and arty-farties.'" So PP acquiesced and cancelled the festival.

Lles says that while the event was paid for by the council, therefore the cancellation didn't leave him in financial hardship, it was emotionally very hard for the team "because there are not many opportunities for working in culture in a small city like Huesca. Although Periferias was a modest festival with a low budget, it was good for the team. But for me it was a hard blow emotionally. Running the festival was almost the whole of my professional life, my dearest dream, the project most important in my whole life. It was horrible."

Fortunately, public response was significant. There was a campaign on change.org with more than 5,000 signatures, letters to newspapers, protests, and more. "But the better response came a week after the cancellation," says Lles. "The councils of two small villages near my city of Huesca:

Ayerbe [1,000 people] and Amudévar [2,000 people] said in the statement that if the Council of Huesca didn't want to organise Periferias, they would do it. It was like David versus Goliath – wonderful! Then the Spanish Ministry of Culture came out in defence of the festival and of cultural rights, and they supported the most important part of the budget of the festival."

The new festival was called Extrarradios [Suburbs], and completed its second edition this year "with great success," says Lles. "We are very happy with the results and reception."

Another festival facing major governmental pressure is EXIT in Serbia. Organisers have vowed the event will not take place in Serbia next year, after a campaign of obstruction and intimidation from local authorities and politicians [see *The Festival Summer*, page 13].

Despite the challenges, most organisers agree festivals remain one of the few public spaces where people with opposing views can coexist peacefully. "At our festival you see people of all ages, religions, and communities – and everything goes well," said Lalot during IFF.

With Kaščák adding: "Society is polarised, yes, but festivals must stay celebrations of freedom – a place where people with different views can meet. Art should provoke, question, make the world better. Even if you change one person's mind each year, that's worth it."

In a year when the very notion of artistic freedom has become a fault line, that belief – that music can connect more than it divides – may be the most radical act of all.

Bite-sized sustainability

By Katharina Weber

Call to continue funding for Green Deal Circular Festivals

Netherlands-based Green Deal Circular Festivals (GDCF) has established a network of 50+ festivals from 18 European countries that pioneer circular solutions at their events. Concepts include the GDCF Model, which offers clear goals and targets for circularity and climate neutrality, and the GDCF Monitor, which tracks material and carbon impacts. At ADE Green, GDCF called on the Dutch government to continue its financial support beyond the project's end in 2025, as an investment in the entire festival sector.



Way Out West: Circular textiles & free entry... in exchange for a kidney

Stadsmissionens collects second hand clothing for Swedish festival Way Out West to rework and sell as merchandise. The event also partners with Dvala – a company that takes garments that would otherwise be burned or go to landfill and turns them into clothing for festival staff. After each edition, staff can return the clothes to be washed and stored. To find out what Way Out West have learned about circularity at events, contact info@wayoutwest.se.

Also, by signing up as an organ donor in the Swedish national registry, donors can win a "kidney pass" – which is a full ticket for Way Out West's 2026 edition.



Štěrkovna Open Music: Academic integration & waste-sorting lines

The team behind Štěrkovna Open Music in Czechia uses the event as a living lab for responsible and sustainable entertainment. Partnering with the Technical University of Ostrava, the sustainability team, which includes an environmental specialist from the university, research waste management, circular materials, and emission tracking.

The festival separates eight waste streams onsite. In 2025, nearly 80% of waste was separated and reused, resulting in only a few grams of residual waste per visitor per day.



Way Out West © Hanna Malmqvist

The Green Europe Experience Handbook

The Green Europe Experience (GEX) is an EU-funded project that includes Boom Festival, Pohoda, We Love Green, A Greener Future, Dour Festival, and GO Group. Having created and tested sustainable production practices in two areas, scenography and food, GEX has turned their findings into a handbook and two concise charters for other festivals to adopt.



Øyafestivalen: Trash Goblin, smart cups & mental health

Trash Goblin Vilde and his new assistant found new homes for a whopping 8.8 tonnes of materials and equipment left over at Øyafestivalen this year, including nearly 500kg of food (up from 4.5 tonnes in 2024). Øya also tested a reusable cup system with RFID chips supplied by tech company TOMRA, which automatically transferred the cup's deposit back into the buyer's bank account.

For social sustainability, Øya partnered with UNICEF (among others) for their campaign "See you at Øya," which focuses on mental health and festivals as important physical meeting places to battle loneliness and exclusion.



Roskilde Festival: Music & music festivals as change drivers

Roskilde Festival believes that art can be used to foster positive change and build community. To get more people on board with this vision, the Danish festival launched their "music and music festivals as change drivers" project.

SPOT Festival (DK), festival network Høme, Future of Festivals and c/o pop (DE), the International Festival Forum (UK), and All Things Go (USA) were among the collaborators, hosting several networking events in 2024 and 2025. Their goal was to inspire cultural actors to use their events to facilitate positive change and get the conversation going on current global challenges like climate change, inclusion, and mental health.



Eat to the Beat: Tips for selling more veggie food

British tour caterer Eat to the Beat promotes low-impact menus with its Sustain-ABLE (Ability, Brave, Leader, Ethical) strategy.

The company revealed some hot tips to *IQ Magazine* earlier this year, which included offering at least 75% vegetarian food (according to research, this makes meat-eaters more likely to choose veggie); replacing 50g of meat with 50g of plant-based protein, to reduce carbon emissions by 25%; using menu design and presentation to make sustainable options the most appealing; using excess rollover ingredients in the following day's menu to minimise waste; and donating leftover food to local food banks.



Sunny Hill: Investing in the land

Before Sunny Hill moved to its current location in the Bernica village suburb of Pristina, Kosovo, in 2022, the team had spent ten months clearing thousands of tons of debris off of a 17-hectare industrial site, starting its transformation into a public park.

They planted 650 trees, with a further 1,500 to come, as well as grass and wildflowers. They installed a large electricity transformer onsite to connect to the grid and they plan to add solar panels and small-scale wind turbines. As they told *IQ Magazine* earlier this year, they will also install a connection to the local sewage system to replace chemical toilets with permanent facilities, as well as a one-kilometre-long canal to irrigate the site, which is necessary due to a lack of rain in the region in recent years.

The 2026 edition will also see green roofs installed next to the smaller stages to provide shelter during extreme heat.



Electric Castle: Reducing travel impact & collecting butts

Fan travel remains the biggest source of carbon emissions for many festivals in rural areas. Electric Castle in Romania has incentivised carpooling by offering free parking and prizes sponsored by partners for festival-goers arriving in full cars, resulting in 6,000 cars packed with 30,000 people. 14,000 attendees forewent car use altogether by using EC trains, whilst another 32,000 opted for one of the non-stop EC buses.

The festival also introduced 'ashtray polls,' where smokers were asked to cast their vote on certain topic by jettisoning their cigarette butt in the relevant bin – resulting in 50,000 collected butts.



BE WTR & Montreux Jazz Festival

Sustainable water company BE WTR and Montreux Jazz Festival in Switzerland have retrofitted BE WTR taps and dispensing units onto wheeled sinks and table units. These mobile water refill points can deliver still and carbonated water across key back-of-house, backstage, and front-of-house areas.

A local manufacturer provides flavoured syrups to add to the water, further incentivising use. Since the stations are wheeled and the site is connected to the mains water, they can be used in prime locations. Feedback from staff has been extremely positive. They no longer have to pick up bottles, empty overflowing bins, or deal with the logistics of ordering water bottles.



■ Live Nation's Tons of Rock in Oslo © Håvard Nesbø

Live Nation plugs into a greener future

As Europe's largest festival promoter, Live Nation's work on sustainability has a powerful impact across the region. Its Green Nation sustainability charter sets out its goals for reducing its carbon footprint and protecting the environment.

"Live Nation festivals across Europe have made strong progress on sustainability this year," say the company's heads of sustainability, Patricia Yagüe (EMEA) and Vikki Chapman (UK and Ireland) in a statement. "About a third have switched from fossil fuels to biofuels, with over 80% having made this transition in the UK. Our main focus now is expanding grid connections – powering more events from the local electricity grid instead of diesel generators. This shift is crucial for sustainability, as grid power is cleaner, more reliable, and increasingly renewable."

And they say they're seeing "fantastic" results. "Over 90% of Sweden Rock's energy came from the grid, and the expansion at Lowlands in the Netherlands has already halved diesel use compared to 2022. Main Square in France nearly doubled its grid use, and Electric Picnic Festival in Ireland continues to power its main stage with 100% renewable energy."

"We've also introduced targeted energy audits at festivals in France and Germany, helping us reduce reliance on generators and boost overall efficiency. The UK team is also trialling hydrogen and battery technology – Audi Presents Wilderness powered all brand partner activations with hydrogen and Boomtown Festival ran its main stage on green hydrogen."

"While sustainable changes do involve upfront costs, we view these investments as a smart way to achieve long-term savings and make a positive impact."

Live Nation European festivals include Mad Cool (ES), Firenze Rocks (IT), Tons of Rock (NO), Rock Werchter (BE), Lollapalooza (DE), Main Square (FR), Reading and Leeds (UK), and Download (UK).

Battery power at LIDO Festival

By Katharina Weber

When LIDO Festival launched at the end of June 2025, it did so with an ambitious goal: to become the most sustainable festival in London. The use of a battery system to power the whole site for an entire day is just one example of how the new AEG Presents-run festival in Victoria Park made good on this promise.

Partner Grid Faeries x Ecotricity supplied a huge one-megawatt battery, which sat next to the main stage and powered it throughout the first day of the event. Before that was possible, however, the festival had to improve the existing connection to the national grid in Victoria Park, according to Sam Booth, the director of sustainability at AEG Europe.

Led by Grid Faeries x Ecotricity, alongside the festival, LS Events, and sustainable tech provider Pearce Hire, they first had to solve issues before tapping into the connection's full potential. "The work was extensive and time-consuming but resulted in us being able to charge batteries that could power the entire festival site for a full day," says Booth.

He explains that the electricity comes from the grid and charges the batteries, which then power the site. On the first day of the ten-day event, headlined by Massive Attack, the system was supported by a suite of back-up batteries, which were charged continually and brought to locations where they were needed, enabling the entire site to be run by batteries. The rest of the days, the grid was purely focused on charging the one-megawatt battery powering the main stage.

"LIDO's launch was a brilliant example of what can be achieved when sustainability is placed at the heart of decision-making. All the teams came together to pull off something remarkable, which really did raise the bar for sustainability in live events, something they should all be very proud of," says Booth.

The biggest challenge when working with batteries, he explains, is ensuring that everyone feels comfortable with the new technology. "There's no doubt the tech works, but our teams have such high levels of professionalism and pride in their work that they are understandably cautious about changing their practices." He acknowledges that battery systems in the past have not always lived up to expectations but thinks that the technology is developing so fast that it's worth persevering because it could potentially yield fantastic results.

His top tip for festivals looking to transfer to green energy: "Adopting a can-do attitude is paramount. The first few steps can be challenging, but I'm sure, one day, this new way of doing things will be completely second nature."



Jana Posth

Rock am Ring & Rock im Park Germany

How was this year's festival for you?

This year was special – the 40th anniversary of Rock am Ring and 30th anniversary of Rock im Park. It was only my second year, so the pressure was huge, but it turned out amazing. Audience expectations were high and that pushed us to try something new. We completely reworked the setup to improve the audience experience. The new LED towers meant you could see and hear everything wherever you were on site, which made a huge difference. The site looked spectacular.

The weather was the one thing we couldn't control, but the atmosphere was still incredible. The 40th anniversary had an incredible effect on people – there was a lot of sharing memories and trips down memory lane while everything around them felt new.

My personal highlights were The Prodigy – I loved it. It was a real full-circle moment, because I listened to them when I was younger – and Korn, who were amazing. Beatsteaks also created a magical moment; something just happened when they came on and the sun came out.

We spent a lot on improving the sanitary situation, and for the first time, we had no bad feedback. We also added a stand near the Mandora Stage that everyone could visit – not just VIP guests – and people loved it. Sometimes small ideas make the biggest difference.

What challenges do you think the industry is facing, and how are you solving them for your organisation?

Costs remain the biggest issue – production, staff, security, artist fees, everything. It's not even a post-Covid thing anymore; it's just become its own dynamic that hasn't stopped. That's tough for smaller festivals especially.

Another challenge is the wider political climate. People are talking about politics more, and it's arriving in the festival space. We have a clear policy: freedom of speech is important but hate speech is not tolerated. Festivals should be places where people can escape from the world for a while, have a beer, listen to their favourite band, and feel free to talk – or not talk – about politics if they want to. That balance is key.

What trends do you see shaping festivals in the future?

Interestingly, rock music is having a real moment again. We sold out earlier than ever this year. It shows people are hungry for live music that feels authentic. We experimented with other genres in recent years, but the energy around rock and metal right now is incredible.

At the same time, audiences want more comfort. It's not just about a stage, fries, and a beer anymore. Glamping is growing fast at all levels, and people expect a higher standard of experience.

We take audience feedback seriously – we read everything and meet every two weeks to review what fans tell us. The shift is clear: they still want the music, but they also want to feel comfortable, dry, and taken care of.

In what ways have you seen European festivals influence global festival culture?

Europe's strength lies in its diversity. So many different cultures exist in such a small area, and that influences every festival here. When you look at other regions – whether the US or Asia – you can see how they've been inspired by Europe's variety and authenticity.

You also see artists wanting to play Europe because the audiences are so passionate. Festivals like Glastonbury, Rock am Ring, and Rock im Park are bucket-list events for bands. The heritage and diversity here have created a cultural richness that's hard to replicate elsewhere.

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

Festivals are the ultimate [places to escape to]. That's important for mental health and balance. People need a space to relax, connect, and forget about the world for a moment.

I think that role will only grow. The world feels heavy right now, and festivals give people a chance to breathe. They're not about being irresponsible; they're about creating a space where you can reset. You come back to your life with new energy and maybe even new ideas.

Festivals are where people find freedom, community, and joy. That's their real cultural value.



Fighting for the future of festivals

■ Ypsigrock Festival in Sicily © Roberto Panucci

YOUROPE general secretary Holger Jan Schmidt looks back at a year that began well but has been marked by new challenges to festival values and a sector determined to protect its future.

YOUROPE's year started successfully with its flagship project, 3F – Future-Fit Festivals, awarded another EU network grant through the Creative Europe programme, enabling it to continue its work for a further four years.

The first iteration of the 3F project received widespread praise and delivered impressive results, and this was only the second time in YOUROPE's history that the association has been supported by such a prestigious funding mechanism.

3F's guiding questions continue to shape not only YOUROPE's work but much of the content featured in this report. At its heart, 3F explores four fundamental questions:

1. What makes European festivals resilient to future challenges?
2. What does the responsible festival of the future look like, and how can we realise it?
3. How do festivals ensure that they continue to play a relevant role in popular culture and the lives of millions of people?
4. How do we make our festivals resistant to threats and attacks on their foundations and values?

This last question is an important addition. In recent months, YOUROPE has been examining this topic through panel discussions and workshops, acknowledging that political pressure on festivals and their values is no longer a rarity. The difficulties are becoming increasingly visible at regional and national level and may even emerge at European level – especially if cultural policy and funding priorities become entangled in broader political and ideological conflicts.

Ideas of diversity, equality, and climate action – which lie at the very heart of the European festival movement – are increasingly at stake in global cultural discourse. YOUROPE sees it as essential to protect these values and the legacy of Europe's festival culture, which has always been rooted in openness, dialogue, and inclusion. A festival that abandons these principles in favour of exclusion or division would lose the very essence of what makes these events so vital and transformative.

In this spirit, YOUROPE supported its founding member, Roskilde Festival, in its Music & Music Festivals as Change Drivers project. The initiative explores how festivals can help create positive change within their own operations, in society, and across the world. YOUROPE delivered two core activities as part of the programme: the 11th GO Group Workshop in Roskilde, which brought together participants from across Europe [see page 39], and a well-attended panel at MaMA Music & Convention in Paris, examining how festivals can help shape a better world.

Speaking of conferences, YOUROPE's members once again proved to be in high demand throughout 2025, sharing their expertise on the most pressing issues facing the live music industry – from artistic freedom to sustainability and safety to diversity, inclusion, and mental health.

Alongside well-established events such as ESNS, Reeperbahn Festival, ILMC, and International Festival Forum, YOUROPE also made a conscious effort to support new and emerging industry gatherings. This included events such as Bridge Conference in Umag, Croatia, and the SoAlive Music Conference in Sofia, Bulgaria – both important new platforms for dialogue and collaboration in Europe's evolving festival landscape.

With a second 3F project funded, renewed EU support, and an ever-growing network of committed professionals, 2025 was another dynamic and purposeful year for YOUROPE. The association continues to stand as a unifying voice for Europe's festivals – fostering resilience, sustainability, and shared values in an industry that remains, above all, driven by passion, creativity, and community.

Bringing the industry together

Over the past few years, YOUROPE has established itself as the leading network and facilitator for the European popular music festival scene. The association's work focuses on knowledge exchange and collaboration among festival organisers while also serving as a vital interface for personal connections between key players in the European touring circuit and festival bookers.

To foster these connections, YOUROPE organises exclusive networking events with limited participant numbers and carefully curated guest lists. These gatherings offer member festivals a unique opportunity to exchange insights on both emerging and established artists with representatives from major artist agencies in London.

In the past year, two Festivals Meet the Agents (FMtA) events were held alongside the International Live Music

Conference and the International Festival Forum, both of which take place in London. Both editions of FMtA received highly positive feedback from festival professionals and agency representatives alike, underscoring the value of YOUROPE's focused and personal networking format.

The jewel in the crown of YOUROPE's networking initiatives, however, remains the European Festival Awards. As the traditional kick-off to the festival season, this event brings together 200 or so participants on the opening night of ESNS. It offers an intimate and celebratory atmosphere where the European festival community can come together – not only to honour outstanding achievements but to engage in direct, constructive exchange and reinforce the sense of unity within the industry.

The European Talent Exchange



■ Luvcat performs at Sziget festival

The European Talent Exchange (ETE) project closes its 23rd year stronger than ever. As the flagship project for the development and cross-border mobility of European musical talent, it remains the longest running and most significant initiative ever funded by the EU's Creative Europe programme.

Initiated and led by ESNS, the project has been supported since its inception by YOUROPE, which acts as the key link between the programme and participating festivals.

In 2025, ETE has so far helped 146 European artists from 29 countries play 343 shows at 93 partner festivals across 30 countries.

Among the most-booked acts of the year are Luvcat from the UK [11 bookings by festivals]; Cliffords from Ireland and Sylvie Kreusch from Belgium [nine bookings each]; and Alessi Rose from the UK and Kingfishr from Ireland [eight].

As in previous years, showcase festivals lead the way in supporting new European talent. The UK's Great Escape tops the list with 22 bookings from the project, closely followed by Germany's Reeperbahn Festival with 21 and MENT Ljubljana in Slovenia with 12. Open-air events are also contributing strongly: Sziget in Hungary has hosted 14 ETE acts, while Best Kept Secret in the Netherlands presented eight, and Lowlands [NL], Maifeld Derby [DE], and Pukkelpop [BE] each welcomed seven.

Since its launch in 2003, ETE has supported 2,295 European artists from 36 countries, enabling them to play 5,709 shows at 208 partner festivals in 48 countries.

What started as a visionary idea in Groningen has become a cornerstone of Europe's live music ecosystem – empowering emerging artists to cross borders, build audiences, and bring European music to the world.

Diversity, equity & inclusion



■ A viewing platform at Seaside Festival



■ SoAlive Music Conference, Bulgaria © Ivana Barova

To foster knowledge exchange around creating festivals and festival companies that are more inclusive to visitors, workers, and artists from all backgrounds, YOUROPE founded a new working group – WIRE (Wellbeing, Inclusion, Responsibility, Equity). While some of its members were already involved in developing the 3F Diversity & Inclusion Toolset last year, the new group laid the foundations for a more consistent support of these values that are currently under attack globally.

In October, WIRE organised YOUROPE's second seminar on diversity, equity, inclusion [DEI], and mental health in cooperation with SoAlive Music Conference in Sofia. Over two days, 30 people from 13 countries heard about the following topics:

- Dealing with stress & preventing burnout in the music industry
- Psychological safety: What it is & why your team needs it
- Mental health support at EXIT Festival, Serbia
- Geographical gatekeeping: how the Balkans are underrepresented in the European music scene
- DEI versus safety? The limits of participation
- How Roskilde Festival creates an impact beyond their event
- Social responsibility communication: how not to pinkwash
- Colours of Ostrava's accessibility programme: Colours Without Barriers
- Identifying barriers to equal access
- How to keep your event affordable
- GENiE database for more gender equality in Europe
- Rising up in the Bulgarian music industry as a woman
- Romanian mentorship programme – Women in Music

In addition, YOUROPE launched its 3F Diversity Internship Support programme. Starting in 2026, it will fund four annual internships at member festivals that focus on underrepresented individuals, primarily underrepresented ethnicities. The goal is to tackle the homogeneity prominent in festival teams across Europe by creating chances for young people of colour to enter the festival industry while bringing fresh, diverse perspectives into established festival teams.



DEI seminar takeaways

Scan the code or visit:

yourope.org/know-how/what-you-can-learn-from-the-dei-seminar-in-sofia



■ YES Group seminar in Roskilde

Strengthening safety across Europe

Changing audience behaviour, rising weather volatility, new technologies, and ongoing geopolitical instability mean safety and security protocols at festivals are constantly evolving. In order to help events stay on top of the latest thinking in this sector, YOUROPE's Event Safety [YES] Group plays a central role through sharing knowledge, improving standards, and strengthening festivals' collective response to risk.

The group's first major activity in 2025 was its annual two-day seminar at ESNS, where 58 participants from 13 countries explored topics including dedicated fan groups, post-event improvements at Happiness Festival [following YES Group feedback], AI applications, how Atlas Festival continues to operate during the war in Ukraine, and crowd management and security planning at Wembley Stadium.

In September, the YES Group held a two-day seminar to mark the 25th anniversary of the accident at Roskilde Festival in Denmark that claimed nine lives and ultimately led to the group's founding. Participants revisited the lessons from the tragedy, worked through real-world scenario exercises, and developed approaches to extreme weather planning and showstop procedures. Their findings fed directly into the 3F Weather Preparedness & Resilience Toolbox, available on the YOUROPE website [see page 52].

In October, the YES Group delivered a one-day workshop at the SoAlive Music Conference in Sofia, Bulgaria, focusing on cross-department collaboration. Through interactive sessions, participants from a wide range of roles and experience levels examined current safety challenges, capacity calculations, scenario operations, and tools for documentation and communication.



YES Group seminar takeaways

Scan the code or visit:
yourope.org/know-how/report-learnings-from-yes-group-seminar-2025

Event sustainability

Green Operations Europe [GO Group] collaborated with Roskilde Festival in April to create a workshop with a special focus on social sustainability. A total of 46 participants from 14 countries met in Roskilde, Denmark, to discuss best practices and the latest developments in green production and audience engagement. Topics covered included:

- How music & festivals can drive change [with Roskilde CEO Signe Lopdrup]
- Roskilde Festival: fostering innovations in their Flokk & Circular Labs
- How to involve young voices in your event
- Analysing changes in festivalgoers' behaviour with the help of science
- Drawing inspiration from the Danish construction industry
- Sustainability in international touring & stage production
- Alive Festival [DK]: involving & activating the local area
- Hope Solutions [UK]: creating tailored reduction strategy for Coldplay and more
- Tackling ticketing & fan travel emissions with The Changency [DE]
- Festival production at Way out West [SE] & Provinssi [FI]

As part of the Green Europe Experience [GEX], GO Group helped develop blueprints on circular scenography and food for other festivals to adopt [see page 32]. 2025 also saw the translation of the Green European Festival Roadmap 2030 into Polish [available soon on yourope.org].

GO Group is YOUROPE's think tank – its goal is to help events run their operations smarter and greener. It 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

Scan the code or visit:
yourope.org/know-how/learnings-from-the-11th-go-group-workshop



■ GO Group seminar © Caroline Nellemann

Same war, different year

By Vlad Yaremchuk

The Ukrainian Association of Music Events (UAME) and its Music Saves Ukraine initiative have continued their essential work of uniting the music industry to provide humanitarian aid and rebuild the cultural infrastructure of Ukraine for what is now the fourth year of the full-scale invasion of the country by Russia.

This was the most challenging year for the initiative so far and yet also one of the most productive and inspiring. Due to the suspension of USAID funding, the team became much smaller and had to constantly secure new funding to stay afloat amidst continued missile and drone attacks and electricity blackouts. At the same time, the team's efforts have now resulted in over €750,000 raised and almost 100 collaborations with festivals and conferences. Music Saves Ukraine continues to pursue cultural diplomacy, promote Ukrainian music internationally, help Ukrainian artists reach European stages, and provide humanitarian aid to Ukrainian victims of war, as well as to promote and support Ukraine's cultural infrastructure and music schools.

For the fourth year, the initiative continued its tradition of collaborating with and touring European summer festivals, reaching 15 events (11 of which are YOUROPE members). Participating festivals are Lowlands, Open'er, Superbloom, Sziget, Provinssi, DAS FEST, OpenAir St.Gallen, Pinkpop, Pohoda, Rock For People, Boom, Hurricane, Southside, Summer Sound, and Electrum Up To Date.



■ The Music Ambassadors Tour saw music industry professionals visit Ukraine © Tania Horbatiuk



■ Music Saves Ukraine takes part in a panel at Pohoda Festival

As part of these collaborations, the team personally set up a Music Saves Ukraine zone featuring a photo exhibition, charity merch, and info stands about Ukraine and the team's humanitarian work at festivals; helped bring seven Ukrainian acts to seven festivals; showed call-to-action videos on screens and organised a special Take a Stand container with YOUROPE at DAS FEST, where visitors could watch a video reminder that the war continues and that more can be done to help those in need; and raised over €50,000 in donations via charity merch, guest list donations, can recycling, cup deposits, and donating leftover monies on festival wristbands.

Two of the team's most ambitious aid projects yet happened in 2025, with the help of the Culture & Education for Life Foundation, which was created by YOUROPE chairman and Gadget Entertainment director of festivals Christof Huber, alongside his partners Fruzsina Szép (Superbloom and Lollapalooza Berlin) and Cyrill Stadler (Gadget Entertainment). First was the printing of 31,650 new music textbooks distributed to Ukraine's music schools, addressing a gaping hole in the availability of up-to-date and high-quality learning materials for young music students. The second was a mini-grant project that helped 12 music schools across affected regions of Ukraine with much-needed new musical instruments and sound gear.

In December, the team ran the third edition of its Music Ambassadors Tour project, which welcomed another group of music industry professionals (including a number of YOUROPE members) on a journey through Ukraine to show them the consequences of the invasion, the resilience of the Ukrainian people, and the results of the team's work. A documentary related to this project will also be released.

The team is grateful to everyone reading this who stands firmly with Ukraine and continues to support Ukrainians.

Anyone interested in collaboration can contact:
vlad@musicsavesua.com

The European Festival Awards



■ Juhani Merimaa wins the Lifetime Achievement Award
© Jaap Kroon

The accomplishments of festivals throughout 2025 will be celebrated when YOUROPE hosts the 15th European Festival Awards during ESNS.

At press time, juries were busy selecting the best festivals, lineup, agent, promoter, and newcomer, with specialist awards presented to events that have made substantial progress in sustainability, safety, brand activation, and social responsibility. Three individuals will also be honoured with the Lifetime Achievement Award, the Award for Excellence & Passion, and the New Kid on the Block Award.

For more info and to purchase tickets:
europeanfestivalawards.org

2024 Winners

Best Major Festival Open'er Festival, PL
Best Medium-Sized Festival Montreux Jazz Festival, CH
Best Small Festival Gladiolen Festival, BE
New Kid on the Block Filip Košťálek, Colours of Ostrava, CZ
Lineup of the Year Hellfest, FR
Newcomer of the Year Benson Boone, US
Promoter of the Year Gadget Entertainment Group, CH
Agent of the Year Anna Bewers, Wasserman Music, UK
The Green Operations Award We Love Green, FR
The Event Safety Award Timișoara – Capital of Culture, RO
The Brand Activation Award Lowlands & Ikea, NL
The Take A Stand Award EXIT Festival, RS
The Lifetime Achievement Award Juhani Merimaa, FI
The Award for Excellence & Passion Vlad Yaremchuk & Music Saves Ukraine

3F Youth Exchange Programme

Developing the next generation of festival professionals remains a priority for YOUROPE.

2025 saw the launch of the 3F Youth Exchange Programme, which enables junior team members from across the network to spend several days working at another member festival, gaining practical experience, building international connections, and learning directly from their peers in real-world environments.

The annual scheme sees YOUROPE support six such visits. Due to the exceptional quality of the applications this year, they secured funding to support two further visits.

Electric Castle [RO], ESNS [NL], Das Fest [DE], Nature One [DE], Provinssi [FI], Rock en Seine [FR], Roskilde Festival [DK], Sofia Live Festival [BU], Superbloom [DE], Taksirat Festival [MK], and Ypsigrock [IT] participated in the inaugural edition.

Participants had the opportunity to work alongside festival teams in their usual fields of work as well as experience unfamiliar departments, such as marketing, press relations, design, festival production, safety and security, sustainability, DEI, hospitality, IT, and more. They returned home with new ideas to implement at their own events... and some great memories.



■ Participants in YOUROPE's 3F Youth Exchange Programme

Tackling politics, costs & extreme weather

Festivals from across Europe came together in November to find solutions to some of the most pressing problems affecting the industry.

The European Festival Conference (EFC) marked its sixth edition with a sold-out gathering of over 80 delegates from 20+ countries, as organisers seized the moment to issue stark warnings about the pressures affecting the sector.

Taking place in Évora, Portugal from 18–20 November in 2025, the conference was organised by YOUROPE and opened with the association's chairman, Christof Huber, reflecting on a year marked by cancellations, postponements, and the ongoing war in Ukraine.

The first session set the scene for the following two days' discussions, as Roberta Medina (Rock in Rio, Brazil and Portugal), Mikko Niemelä (Ruisrock, Finland), Fruzsina Szép (Superbloom Festival & Lollapalooza Berlin, Germany), and Shpat Begolli (Sunny Hill Festival, Kosovo) discussed challenges such as rising production costs, changing audience demands, and more.

Niemelä said a major storm nearly forced the cancellation of this year's Ruisrock, while Medina warned festivals not to externalise their struggles: "Let's stop talking about tough times. It's our business. When the conversation goes outside our rooms, the impacts are different."

Begolli said Kosovo's economic reality makes headliners difficult: purchasing power is low, travel is inconvenient for artists, and sponsor support is vital. A severe regional drought also impacted their long-term ecological plans.

When asked whether the headliner model is breaking, Szép was clear: "We'd be lying if we said we don't need them." But she noted a major shift: nearly 50% of Lolla/Superbloom attendees now buy tickets primarily for the onsite experience.

From the audience, Alter Art's Mikolaj Ziółkowski was blunt: "If many great festivals are losing money, something is wrong with our business. We have to bring costs down."

With artist and production costs exploding, the session *Creating Cash: Revenue Without Alienating Audiences* tackled how festivals are rethinking income streams.

Rock am Ring's Jana Posth described the impact of modern headline productions: vast touring rigs, huge crews, and overnight stage rebuilds. Luděk Motyčka (Rock for People) said "Cutting costs is no way out of the hole. Spending less doesn't mean earning more." Examples of



■ Delegates at the European Festival Conference © Rahel Inauen

investments that worked included permanent infrastructure at Summer Breeze: warehouses, water pipes, vacuum toilets, and owning your F&B, ticketing, and merch, which adds 30–40% on top of ticket revenue.

In one revealing session, festivals shared the economic impact they have on countries. Boom Festival saw €51m spent by its audience and €17.7m in organiser expenses; plus festival-goers generated 119,000 hotel nights before/after the festival.

Rock in Rio Lisboa demonstrated that while the majority of its audience is from Portugal, 60% come from outside Lisbon, and the festival is now a pillar of national tourism.

A major topic across the EFC was the increasingly political landscape festivals find themselves operating in. Promoters across the conference shared stories of boycotts, government and local authority oppression, malicious disinformation campaigns, and more. During one poignant session, executives from Sziget, Boom, and Øya festivals shared their experiences and the measures they took to protect their events, as well as the toll these experiences took on their teams.

And Ivan Milivojev, co-founder of EXIT Festival, told of the event's struggles with the Serbian government in 2025 that led to EXIT declaring it wouldn't take place in the country in 2026. He recounted incidents of extreme pressure from politicians, who tried to ban the event, didn't give them the licence until the last minute, and accused EXIT of being a gathering place for drug abuse, as well as having its funding withdrawn and sponsors pulling out. "They did everything they could to stop the festival," he said. "Literally everything you can imagine."

In *Dancing in the Dark: Building Resistance*, Prof. Özgehan Şenyuva and YOUROPE's Holger Jan Schmidt mapped the vulnerabilities festivals face when political actors or state bodies attempt to disrupt events. Delegates workshopped how to counter "spin".

Other sessions included practical tips on how to handle extreme weather events, advice on how to use AI in festivals, showstop procedures, sustainability initiatives, insurance and legal updates, and tackling ticket touts. It ended with a heartwarming session filled with personal stories of why festival organisers do their jobs.



Artur Mendes

Boom Festival, Portugal

How was this year's festival for you?

We are incredibly happy with this year's edition. We welcomed around 45,000 people from 165 countries. The cultural programme was of exceptional quality, and we made significant artistic innovations with magnificent new artworks. We captivated new audiences and strengthened the loyalty of others. We also implemented major environmental innovations in sanitation, water management, and reforestation. And the vibe at the festival was truly magical. Most importantly, in a period of so much polarisation, division, and tension, we managed to create a positive environment of social harmony, filled with tolerance and love among people from diverse cultures. While the dominant system often speaks of a clash of cultures, at Boom (and many festivals around the world), cultural diversity is a source of strength and richness – not a cause for division.

What challenges do you think the industry is facing and how are you solving them for your organisation?

The festival industry is broad, and each movement has its challenges. However, some issues deserve reflection.

What is the role of large agencies in diminishing artistic diversity? What is the limit for some of the fees being paid to artists? How will we manage to increase the quality of festivals in Europe when the cost of living is higher, there's increasing debt, and people have less purchasing power? Will production and licensing costs continue to grow? How will policies that reverse environmental progress impact festival sustainability policies? How will the growth of political forces that devalue freedom impact festival culture? How will we deal with the wave of cancel culture that affects arts and culture, which now calls for indiscriminate boycotts [I agree with some against countries that oppress others], often without truly analysing its targets? How will diversity policies impact the vibe of festivals? How do we deal with increasingly extreme climatic phenomena? And in what way can the ultra-reliance on technology for social purposes affect relationships at festivals?

For our part, we are addressing many of these issues. Our focus is to be as independent as possible (we don't accept sponsors) and to regenerate the space where we hold our festival as much as possible in environmental terms. There is one theme that increasingly occupies our time: raising awareness of the spirit of community.

What trends do you see shaping festivals in the future?

The importance given to technology as art will continue (with more spectacular shows, drone-use, new ways of listening to and feeling music). The aesthetic side will continue. People value an experience where aesthetics is a factor. Progressive festivals will continue to reinforce their environmental policies. And I also see a growth of festival culture in other parts of the planet. Asia is undoubtedly already seeing it, as is Africa. This will bring new realities in terms of individual expression, gender equality, and the relevance given to VIP culture, which abounds in some of these countries.

Above all, one thing is certain: we are social beings. Festivals will increasingly be places of great socialisation, places where people can deal with other humans on a scale they haven't before, and this has great therapeutic and transformative power.

In what ways have you seen European festivals influence global festival culture?

The diversity that European festivals bring to the world is remarkable. It's complicated to generalise, given the cultural diversity of the continent and the different licensing realities. However, festivals represent their national and local communities. And in an era of easy transport and mobility, this diversity can end up influencing other countries. There is also a culture of diversity and non-discrimination that is quite common in many countries, and I hope this is the great export to emerging countries.

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

Festivals are like positive atomic bombs, expanding the boundaries of art forms and culture, fostering the fusion between disciplines, but essentially, in the enjoyment that audiences have of art and culture. It is the strongest, most transformative, and most inclusive medium that exists. They are places where thousands of people access art and culture in a truly democratic way. Where we can connect with our fellow human beings, individually or in groups, surrounded by art, culture, music, and often in fantastic locations. They can be small samples of utopian societies, where the distinction between classes does not exist, where the power of art is the most important value, where music truly transforms people. For me, they are indeed experiences of transcendence and what defines us as human beings.

The state of independents



■ Ruisrock remains independent after 50 years © Miikka Varila

While consolidation continues across the festival business, Europe's independents continue to carve their own paths. James Drury reports.

For all the noise around consolidation, global deals, and the rise of stadium spectaculars, Europe's independent festivals remain the sector's beating heart. They nurture new talent, bring creative risk to the landscape, and stay stubbornly close to their audiences. But in 2025, independence is looking increasingly difficult. From booking challenges to spiralling costs and unpredictable weather, many indie events are operating on thinner margins, within narrower windows, and with deeper personal commitment than ever before.

Sunny Hill Festival – founded by Dua Lipa and her manager/father Dukagjin – takes place in Kosovo. It was twice nominated as one of the Best Mid-Sized Festivals at the European Festival Awards and has featured performances from Miley Cyrus, Calvin Harris, J Balvin, Stormzy, Skepta, Bebe Rexha, and unsurprisingly, Dua herself.

The event's managing director, Shpat Begolli, says one of the key things he values most about being independent is how close the team remains to the community it serves. "We're a very close team of less than ten people who work throughout the year," he says. "Pretty much all the discussions and all the decisions are brought within the team. Anytime Dugi is in Pristina, we have these ten-day sessions. Sometimes we even visit him in London. But the freedom is there to discuss everything you feel is good for the festival."

"Because we're independent and close to our audience, you don't have that corporate border between the audience and the people. We meet people throughout the year, and during the festival, we're there – sweat and blood – from day one of the build until everyone's gone. I believe that gives us a unique feel."

This closeness – emotional, creative, financial – is a recurring thread across the independent landscape. It's also central to the story of Summer Breeze, the German metal festival founded and still run by Achim Ostertag. For him, independence is defined by freedom of thought and the ability to invest in things that don't make immediate financial sense but build the soul of the festival.

"Being independent means making your own decisions, spending money on what you think benefits your festival," he says. "Take our kids' programme – it costs money, and it doesn't recoup at the time. But in the long run, it's worth it. Many kids in the area grew up with it and became metalheads. So the money's well spent. But major companies don't look ten years ahead. That's the difference."

Finland's Ruisrock – one of Europe's longest-running festivals – sees it similarly. Director Mikko Niemelä says independence gives them permission to take risks, even if it also exposes them. "At least you're free to choose the good or the bad options yourself," he says. "You might be a little more flexible to do the unexpected. Of course, there are downsides. The vulnerability is real – our shoulders are not very wide. But the creative freedom, the ability to decide things ourselves, that's one of the rewarding parts."

Ostertag also sees independence as a way to champion new talent. "There's no other festival our size with so many small, fresh new bands on the bill. We book them because we say: 'This is the next cool thing.' We picked bands like Jinjer and Kanonenfieber early – this year, Kanonenfieber sold more merchandise than any band has ever done at Summer Breeze."

But independence now brings unprecedented challenges. The most pressing issue isn't new, but it is accelerating: the tightening grip of global deals and multinational exclusivities on the touring ecosystem.

Ostertag is blunt: "If Live Nation has the tour and you're a Live Nation festival, you get the band. If Eventim has it, their festivals get it. If we want to book Metallica or Linkin Park, it's impossible. But what's changing is that even the newer and smaller bands are getting overpaid because of this system. It's getting harder and harder to stay independent."

Girts Majors, founder of Positivus in Latvia, feels that precarity, too – and argues that being small and independent makes you more vulnerable to bad behaviour from international agencies.

"There was one situation where we were really screwed by an American agency," he says. "They could never afford to do that with major players or larger companies. But because we are independent and small, it was easy. Even if you have a case, it's impossible to go to court; it's too complicated and expensive. That was one of my learnings: no one helps save independents. You are more insecure; you're under more risk."

Niemelä recognises the pressure, too, but says Ruisrock has good relationships with the multinational players. "Even though we are a private, independent company, we work closely with Live Nation," he says. "Most of our international talent comes through them."

"We're kind of an anomaly. But in a small market like Finland, those relationships matter."

Majors says operating a festival in a Baltic market of just 6m people comes with built-in limits. "The market is tiny. All changes you feel quicker and harder than in larger markets. However, that also is a benefit – because we don't have backup behind us, it forces us to avoid big mistakes. You need to be more careful; you need to survive."

For Luděk Motyčka of Czechia's Rock for People, the challenge splits into two buckets: booking and economics.

"Some artists are unavailable because they're signed to global deals. It's not that they're fully unavailable – but it's more complicated. Sometimes it works in our favour for smaller acts, but that's a small percentage."

"Then there's economics. We don't have massive financial backing. We live from what we earn. If we make a major mistake, it can take us down. We need to be more careful than a corporation with deep pockets."

Ruisrock approaches the same problem with long-term discipline. "Our shoulders are narrow, so we keep a big buffer," says Niemelä. "We've always managed our finances so we can survive two bad years. There's nobody to call – nobody sends us \$10m to fix things. So, economic sustainability for us means fair wages, paying taxes, and building reserves for the future."

"In business, the bad year will always come. No matter how fantastic you are."

Despite the structural disadvantages, independence still enables a creative elasticity that Sunny Hill's Begolli says means innovation and creativity are baked into indie festivals' DNA.

"Being independent means ideas can come directly from the people closest to the audience," he says. "Our Sunny Hill Believer ticket [sold before the lineup is announced] came from listening to people. They told us: 'We trust you'll put on a great lineup.' So, we created the Believer ticket: the cheapest price of all. And I think others have been inspired by this idea."

At Positivus, creative autonomy is Majors' primary motivation for staying independent. "I don't know if I could run the festival under large ownership. It wouldn't feel the same. The motivation comes from being the creator and



■ Czechia's Rock for People festival © Klapper.cz

Independents

doing it my own way. This festival is not a money-maker; it's something we keep alive through challenging times because we feel passion for it." He says promoting concerts throughout the year helps balance the books.

Rock for People festival in Czechia echoes that sentiment. "We can afford to think purely about fans," says Motyčka. "There are no strings attached, no targets. That's the difference."

But do audiences care about a festival's ownership? Ostertag believes metal fans absolutely do. "People know behind Summer Breeze there are real metalheads. They defend us online when people call us a cash cow. They know we're independent, and they behave differently because of that – you can see it in the grounds. After the festival ends, there's almost no trash. There's a family spirit."

But in Latvia, Majors sees the opposite: "I don't think our audience cares. Maybe in some cultures people value local ownership more, but not here."

Motyčka agrees: "People basically don't distinguish if the show is brought [to them] by a multi-national or an independent promoter; they just enjoy the show."

All the promoters we spoke to were clear about one thing: independence doesn't mean isolation.

Motyčka is emphatic: "Information sharing is crucial. We're extremely lucky to have EUROPE and events like the European Festival Conference. We talk pretty much with everyone – Live Nation festivals, Eventim festivals, Superstruct festivals. The support we've received helped us grow fast. It's a great community."

Begolli also believes in collaboration: "If several independent festivals could collaborate to offer artists a run of dates or share production between five festivals, it would be very beneficial. Even exchanging experiences helps. We learn from each other."

Majors goes even further: "If you are completely alone, it's never possible. You need a network."

When asked if they would ever consider selling their event, only Ostertag is unequivocal.

"Sell? Absolutely not. Over my dead body," he says.

"People write to me all the time with offers. I'm not interested. But I have to be honest, running a festival as an independent is getting more difficult, and [it's happening faster] than I expected."

Motyčka is more pragmatic: "Everything has a price. If there's a universe where we can do the festival better, faster, more efficiently, we're open to it. But it's not something we're actively seeking."

Niemelä feels similarly: "I never say never," he admits. "For me, the most important thing is that the festival is now 55 years [old], and I want it to stay for the next 55. If it has to be sold to keep it alive, then it has to be. But the heritage is what matters."

As he puts it: "If you stop a Finnish person in the street and ask them for the three [most important] things about Turku, they'll say, 'the river, the castle, and the festival.'"

The independent festival sector may be under pressure, but it isn't breaking. If anything, it continues to be more collaborative, more resourceful, and more strategically creative.

■ Sunny Hill Festival in Kosovo





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Sabrina Trovant

Rototom Sunsplash, Spain

How was this year's festival for you?

This August we celebrated the festival's 30th edition, with an overall participation of 218,000 people from 111 countries over eight consecutive days. It was an intergenerational audience with some 17,000 children and 12,000 over-65s, confirming Rototom as an annual family reunion for a global tribe. The programme offered over 200 shows across seven music stages and numerous activities in ten cultural areas. Our livestreaming from the festival reached 3.7m viewers worldwide.

What challenges do you think the industry is facing and how are you solving them for your organisation?

The main issue in our area is that we see the temperature increasing a little every year. For next year's event, we have already decided to open the venue three hours later (at 5pm instead of 2pm). Another problem for us to deal with is the wind, which can be extremely strong: in 2023, we had to evacuate the festival at midnight and cancel the rest of the shows. Emergency protocols are something we never forget to teach our staff, along with regular refreshers.

As is the case with all festivals since the pandemic, we have been facing increasing production costs and artist fees. But we are also aware of the economic challenges that people are facing in everyday life, so instead of increasing the ticket price, we decided to cut the number of festival days (from eight to six or seven).

What trends do you see shaping festivals in the future?

Hopefully, there will be more serious commitment towards environmental sustainability. This is a must for all festival promoters, but unfortunately, I see only a few festivals really committed to it. The conversation needs to shift from mere "sustainability" (doing less harm) to "regeneration" (actively improving the environment). Festivals will be judged on how they leave a site better than they found it and how they positively impact their local communities.

At our festival, each year we introduce new elements to try to improve our interaction with the site and the surrounding community. This year, for example, we invested heavily in reducing the energy consumption by more than 945 kWh (together with the related emissions) by introducing extensive solar lighting, both in the venue and the campsite. We have steadily built on our water recycling programme and the introduction of refillable water points. This is helping us become plastic-free.

Since 2023, we have certified our carbon footprint in accordance with ISO 14064-1 with the official body AENOR.

In addition to this, one of the major trends is the use of new technologies. We will see more cashless systems, app-based scheduling, and perhaps even AI art installations. But the core human need for connection remains paramount. Technology serves to facilitate that connection, not to replace the bass in your chest. The future is not just about watching shows but about participating. Festivals can become immersive worlds where you can learn a skill, join a drum circle, debate a topic, or practice yoga at sunrise. Also, we feel that the era of the generic "music festival" is fading, in favour of events with a strong, specific identity – be it genre-based, value-based, or themed. People seem to crave authentic belonging – not a generic party.

Last but not least, we find that older festivalgoers are more likely to attend events that provide them with a more comfortable and complete experience: good music, quality food, and better services.

In what ways have you seen European festivals influence global festival culture?

European festivals have been laboratories for a unique model that has been exported worldwide. Festivals like Glastonbury, Roskilde, and Rototom perfected the idea of a temporary, self-contained city, providing not just music but camping, food, markets, art, cinemas, forums.... This holistic "live-in" experience, where you eat, sleep, and breathe the festival for days, has become a blueprint for major festivals globally.

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

Festivals are the modern-day agoras. In a world increasingly dominated by digital isolation and algorithmic culture, we have the chance to provide a vital, physical space for the living, breathing exchange of ideas, rhythms, and human spirit. Our social forum is a prime example of integrating strong social, political, and environmental messages into our core identity. Meanwhile, our Reggae University gathers performing artists and other professionals to create a dialogue with the audience, demonstrating that a festival can be a powerful platform for activism and education, not just entertainment.

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Weathering the storm

■ DAS FEST in Germany was one of many events this year that saw weather issues © Steffen Eurich

Heatwaves, storms, wildfires, and droughts are becoming an increasing challenge for outdoor events. But proper planning can help mitigate the worst effects. Here's how to tackle whatever the weather gods and goddesses throw at our outdoor festivals.

Across Europe, extreme weather events due to the impact of climate change are no longer the rare occurrences they used to be. Yet, while these events are escalating, much of their impact on festivals is still preventable with the right preparation.

Prof. Miguel Almeida of the University of Coimbra in Portugal described the consequences for events at the European Festival Conference in November. "We all know the consequences of climate change," he said. "More heatwaves, more dryness, more heavy rain, more strong winds. Each of these elements can trigger real hazards for festivals – from wildfires and flying debris to contaminated water sources

and serious public-health impacts like heat stroke and dehydration."

According to the Intergovernmental Panel on Climate Change [IPCC] projections, Europe is heading for more days above 40°C, longer periods without rainfall, and increasingly violent downpours. Even moderate climate models predict more disruption. But Almeida said that what we're seeing in reality is in line with the most pessimistic climate models. Western and Central Europe should expect more heavy flood risk; Mediterranean countries face worsening drought and wildfires; wind averages may remain stable but extreme incidents will intensify.

Recent news-grabbing events underline the threat festivals face. Wacken Open Air in Germany was forced to run its 2023 festival at a significantly reduced capacity after the site was hit by rain and thunderstorms in the days leading up to it, leaving the camping areas "impassable." That same year, the final day of Slovenia's MetalDays was scrapped due to torrential rain and flash flooding in the area, and in 2024, a tent collapse due to a severe storm at Pohoda festival injured 29 people. Elsewhere, heat has become a major disruptor: Falls Festival in Australia cancelled on fire-risk advice; UK festivals paused during the 2022 heatwave; and a woman died at a 2023 Taylor Swift show in Brazil after suffering cardiac arrest linked to dehydration in a heatwave.

These events are forcing organisers to rethink their current plans and policies. For example, with security restrictions often preventing audience members from bringing in water, and heat intensity rising, festivals must consider whether this might inadvertently increase risk.

Communications teams are playing an increasingly important role when it comes to helping festival-goers to manage extreme heat, ensuring that they know they are responsible for their own safety and providing useful information.

One way of navigating the risks from extreme weather is to work with a meteorologist who can provide localised forecasts. This can mean the difference between knowing a storm will miss the site (and therefore doesn't need to be evacuated or altered) and not knowing.

Tristan Semsch is a specialist meteorologist at Germany-based EWB Wetterberatung, advising festivals across Central Europe on severe-weather planning and real-time decision-making. "The permanent personal consultation provided by an experienced meteorologist offers many advantages," he says. "It enables direct and rapid communication. The meteorologist serves as a constant point of contact for all those responsible, and can explain the hazard situation during safety briefings (either virtually or on-site). In this way, the meteorologist can point out the urgency in a particularly effective manner and without delay, and if necessary, prompt the rapid initiation of appropriate measures.

"In addition, on-site weather consultation includes visual observations at the event venue on days with high severe weather potential, which are essential for forecasts that are as quick and as accurate as possible. This often gives the event organiser valuable time in the event of an approaching severe storm. On large event areas, a meteorologist – with their very specific perspective – can potentially identify critical spots where problems could arise in extreme weather events. These can include things such as vulnerability to wind, windthrow, or the drainage and run-off behaviour of surface water."

He cites an example at Hurricane festival this year:

"Forecasts indicated a long squall line would cross the site that evening. As the timing and intensity became clearer through the day, organisers made the late-evening decision to evacuate tens of thousands of visitors to their vehicles. The process ran quickly and smoothly, and after around two hours, the festival was able to resume."

DAS FEST in Germany works with EWB Wetterberatung. Festival director Markus Wiersch said the impact on decision-making has been profound. "Having a specialist on site changes everything," he says. "We get real-time observation, not just what a model suggests. They can interpret all the available forecasts, explain the differences, and tell us what's actually happening above our heads. And when conditions shift – which they always do – we get immediate answers. That level of clarity is impossible to achieve on our own."

He adds that relying on a professional meteorologist lifts a significant burden from event management. "Weather monitoring is incredibly time-consuming and requires expertise. With a meteorologist on site, our team can focus on operations, because we know someone is watching the sky every minute of the day."

DAS FEST has faced its share of challenging situations. "Extreme weather is the biggest and most likely threat to any open-air festival," Wiersch says. "It's not only storms, hail, and lightning – it's heat, drought, sudden temperature swings. These affect everything: the audience, the infrastructure, logistics, storage, even the land itself. A dry summer means broken branches and fallen trees; heavy rain means different ground stability; heat affects every working shift."

He recalls a particularly challenging moment in 2025. "We had a very bad weather situation – a complex, high-risk pattern. But because our meteorologist could classify it quickly and accurately, we kept the festival running safely. We updated the crowd at short intervals because the information was so precise. Even so, there are situations where no technology can give you total clarity. That's part of the job."

According to Almeida, a structured approach to the challenge is required: planning, prevention, preparedness, response and post-event analysis. Prevention is the most effective measure but only works with detailed scenario mapping, including predefined trigger points – thresholds for wind, rainfall, temperature, or smoke that automatically prompt a response. "If strong winds are forecast, we need clear values that tell us: 'After this point, we do this,'" he said. Wildfire scenarios add further complexity, as wind behaviour can shift rapidly around a fire.

Extreme weather is here to stay. The dangers are real, but their worst impacts are avoidable. As Almeida said: "There is no such thing as zero risk, but there is much we can do to reduce it."

How to prepare for bad weather

By Sabine Funk

When Pohoda Festival in Slovakia abruptly cancelled its final day in 2024 after 29 people were injured when a storm caused the collapse of a large tent, many festival professionals saw it as another reminder of a trend they had been observing for years: weather is no longer a background risk; it is now shaping the core of festival planning.

Across Europe, storms, heatwaves, and enduring rain have disrupted a lot of outdoor events during the past few years, festivals being no exception. In 2022, high winds led to a stage collapse at Medusa festival near Valencia in Spain, killing one attendee and injuring dozens more; the following year, Germany's Wacken Open Air had to reduce capacities by tens of thousands of visitors due to torrential rain; and extreme heat is challenging both audience and staff at dozens of festivals from Portugal to the Balkans each year.

These incidents are no longer rare. They form an emerging pattern that no one can ignore: the climate is changing, and festivals must change with it. Storms develop faster, gust fronts are stronger, heatwaves are longer, rainfall is more intense, and wildfires are a feasible threat. Microclimates on festival sites – created by trees, valleys, asphalt, and temporary structures – make predictions even harder. And this also leads to pressure from authorities and insurers and rising expectations from the public, which have to be addressed.

As part of its Future-Fit Festivals [3F] project, YOUROPE has developed an Extreme Weather Toolbox, a comprehensive collection of shared knowledge, tools, and good practice examples to help festivals prepare for, manage, and respond to weather impacts.

What's in the toolbox?

The toolbox is a modular, expandable knowledge platform. It contains templates, checklists, decision matrices, case studies, and examples of good practice, delivered by practitioners and weather experts. Besides a lot of tools aimed at production and planning, it includes learning tools, emergency scenarios to rehearse, and materials that can be distributed to audiences.

■ Photos: Das Fest © Steffen Eirich (left), Jürgen Rösner (right)



Key topics

Weather hazard awareness: This section links key weather types to their operational impacts – from anchoring stability and ground saturation to lightning proximity, heat stress, and crowd behaviour under adverse conditions.

Risk assessment & planning: Risk matrices, vulnerability checklists, and site-specific assessments help identify weak points, such as drainage, wind channels, and ground conditions – often the real cause of weather-related incidents.

Monitoring & early warning: This section explains how to use reliable sources – meteorological services, radar, lightning detection, and on-site sensors – and how to assign clear responsibilities.

Decision-making & communication: Clarity is crucial in fast-moving weather situations. This section provides escalation flowcharts, trigger thresholds, and ready-to-use communication templates.

On-site implementation: Issues like mud congestion and overcrowded shelters require coordination between infrastructure teams and crowd managers. Checklists and calculation sheets support operational decisions.

Training & learning: To strengthen readiness, the toolbox offers tabletop exercise scenarios for common weather conditions.

Educating the audience: Clear visitor information improves safety and supports confidence to buy tickets. This section includes FAQs, packing lists, and communication ideas for weather-related messaging.

Case studies & lessons learned: Real European incidents show how quick decisions can prevent or worsen critical situations.

Research & resources: A curated selection of studies on weather and mass gatherings provides the scientific basis for the toolbox's recommendations.

The Weather Toolbox was developed and curated by YEUROPE's Event Safety [YES] Group – a network of safety professionals from across the continent.

Many of the tools, templates, and examples included in this toolbox come directly from festivals within YEUROPE's membership. Others are contributions by practitioners from the wider community, who shared documents, lessons learned, and good-practice approaches developed over years of working in the field.

The result is a set of tools built by the sector for the sector, combining academic insight, operational experience, and the lived reality of festivals facing increasingly unpredictable weather.



The toolbox will be released in January 2026

Scan the code or visit:

yourope.org/weather-toolbox



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Vlad Yaremchuk

Atlas Festival, Ukraine

How was this year's festival for you?

It was our second wartime edition, and despite all the challenges, it was a success. 2024 was uncharted territory – new venue, new safety infrastructure, new reality – and just delivering it then felt like a big win.

The lineup was stronger because artists knew we were back. Despite the odds, we landed another amazing international headliner, The Rasmus.

The charity aspect became even more impactful and ambitious. We raised over €2.5m to help the country.

Operationally, it was intense. Still, it all went smoothly, and we had our first-ever sellout – two of the three days and the full passes were completely gone. It was our tenth anniversary, too, so it really felt like a celebration.

What are the biggest operational or logistical challenges you continue to face in producing large-scale events in Ukraine, and how have you and your team overcome them?

Unpredictability is still the main challenge. We plan for all kinds of scenarios, but in our environment, you cannot prepare for everything. You just have to be ready to adapt on the go and make quick, difficult decisions based on the situation at hand.

There is also a labour shortage. Many people have left the country or are fighting. That affects manual labour most – stage technicians, riggers, security, and people who build and carry things. It's not a disaster, but it means we have to plan ahead and accept that things will take longer.

And then there's safety. This year, we had our first real evacuation on day one. You can train and theorise all you want, but when it happens for the first time, there will be challenges. The biggest one wasn't logistics – it was convincing people to actually go to the shelter and spread out there instead of piling up near the exits. Alarms happen so often here that people stop reacting. But at the festival, we're responsible for them and can't afford complacency. There is some relief now as we know what the real weak spots are and can spend a year addressing them.

Has audience behaviour changed since before the war?

A lot. People don't take the festival for granted anymore. They are surrounded by bad news, by exhaustion, by loss. So, when they find it in them to go, they go to really live. It's not about escapism or entertainment; it's about connection, gratitude, solidarity.

Everyone knows it's a privilege that the festival even exists. They come not just to enjoy music but to donate, to show unity, and support each other.

The lineup is mostly Ukrainian now, and you can feel the difference in the music itself – it's less abstract. Artists use it to reflect reality, bring up important topics, but also to bring relief. The connection between the artist and the audience is stronger than ever. It's not just another show; it's a special, rare, and emotionally intense experience amidst all the craziness. This especially applies to those few international acts that make it here – the audience gives them their best and expresses their deepest gratitude for showing up and supporting them. It creates a lifelong bond.

From your perspective, how is the rest of the European festival community supporting Ukraine – and what kind of collaboration or solidarity has been most meaningful?

There is clearly less attention on Ukraine, which is not surprising. It's been almost four years, and there is a lot of turmoil across the world. People cannot afford to care about something more distant when they can barely handle problems at home.

And yet, there are incredible people across the industry who realise this and only reinforce their support for Ukraine, making up for the support that is no longer there.

This can really be felt at UAME | Music Saves Ukraine, where I proudly work as a partnership manager. We continue to work with festivals to bring Ukrainian artists to their stages, use their platforms to talk about Ukraine, and raise money to make a real difference on the ground here.

Bringing our friends and partners to Ukraine as part of our *Music Ambassadors Tour* project also makes a massive difference. Our struggle becomes their struggle, and they truly become our ambassadors. They inspire us to continue, and with them, we never feel alone.

So despite this year being our most challenging one yet, thanks to the funds we raised together, we were able to print over 31,000 new music textbooks for music schools across Ukraine and help 12 music schools that were doing an exceptional job while dealing with destruction and immensely challenging conditions.

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Nova Rock
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BELGIUM

Pukkelpop
Rock Werchter

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A To Jazz Festival
Sofia Live Festival

CROATIA

InMusic Festival

CZECH REPUBLIC

Colours of Ostrava
Rock for People

DENMARK

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Lapee
NorthSide Festival
Roskilde Festival
Smukfest

FINLAND

Blockfest
Ilosaarirock
Kesärauha
Pori Jazz
Provinssi Festival
Qstock Festival
Ruiskrock

FRANCE

Insane Festival
Le Laba
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Peacock Society
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Nature One
Open Flair Festival
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Rock am Ring
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Splash! Festival
Stadtspark Open Air
Summer Breeze Open Air
Superbloom Festival
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Release Athens
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Sziget Festival

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8 Festival

LUXEMBOURG

Siren's Call

NORTH MACEDONIA

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NORWAY

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Kraków Live Festival
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SPAIN

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

SWEDEN

Department Festival
eps Scandinavia
The Production Office
Way Out West

SWITZERLAND

Baloise Session
Festi'neuch Neuchâtel
Greenfield Festival
Gurtenfestival
Heitere Open Air
Montreux Jazz Festival
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Seaside Festival
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Stars in Town
SummerDays Festival
Venoge Festival
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Five things we learned from Jim King's IFF keynote



AEG Presents' CEO of European Festivals, Jim King, delivered an insightful keynote at the 2025 International Festival Forum. Here are five key takeaways.

1. The grassroots crisis is real – but the top end is thriving

King began by painting a mixed picture of the 2025 festival season. "The grassroots end of the business continues to struggle," he said, pointing to community-level events in both the UK and France that remain under financial pressure. Yet at the other end of the market, major festivals are booming, buoyed by new generations of headliners. "It's been staring us in the face," he said. "There are now stadium and festival headliners under 25 – certainly under 30 – and that's a great barometer for the future."

2. Sustainability is taking great strides forward

AEG's latest launch, LIDO Festival in London's Victoria Park, was designed to push environmental boundaries further than ever before. "It was the highest sustainability benchmark we've ever attempted," King said. The event achieved an 89% recycling rate – roughly double the UK average – and ran its first day entirely on battery power.

King's message was simple: experimentation must lead to progress across the industry. "It would be crazy if that effort ended with us," he told the audience at IFF. "Massive Attack were the right people to take this to the industry – and now we all need to go further again."

King emphasised the need for better grid investment from both government and industry. "If we can operate outdoors the same way we operate indoors at The O2 [AEG's arena in London], we're winning."

3. Community relations aren't optional

As urban festivals face rising resistance from residents, King made a passionate case for building trust with local communities – something he sees as fundamental, not optional. "We mess it up sometimes as an industry," he said bluntly. "If we're not welcomed, we won't survive."

He recounted how BST Hyde Park transformed from "not fit for purpose" into a world-class show after years of careful engagement with residents. "They were very organised and very hostile at the start," he recalled. "Now they're proud to be involved. They're part of the management meetings, and they feel listened to."

For King, that collaboration is now part of AEG's DNA. "It's the lifeblood of what we do," he said. "If fans can't enjoy themselves in their own cities because we didn't do a good job, the whole industry suffers."

4. Festivals have life cycles – evolve or disappear

King was unsentimental about the growing number of long-running festivals taking a break or closing altogether. "Everything has a sell-by date, including what we do," he said. "The demands of fans are so high now that if you can't meet them, you have no right to continue just because you've been doing it for 20 years."

He believes constant reinvention – and the involvement of younger teams – is vital. "The success of All Points East isn't because I started it; it's because Oscar and Darcy book it," he said. "BST is thriving because I've given up a lot of the booking. The younger people bring fresh ideas and make it relevant."

It's a philosophy of renewal rather than nostalgia: "The worst thing I could do is think it's still all about me."

5. The live sector needs to think more long-term

Perhaps the most provocative part of King's talk was his criticism of how live music failed to capitalise on the rise of streaming. "When downloading arrived, the record companies figured out the streaming model. They built a platform that now makes them more money than ever – and we missed that moment completely," he said.

He used the example of sport using broadcasting to expand its reach to billions, while live music has kept its focus on the physical experience. "We said, 'Unless you're standing on the floor at [a venue], it's not live.' That's insane," he argued. "If we'd created our own platform 20 years ago, even earning 0.01% from global streams, the value to this industry would have been enormous."

He urged the business to think longer term and more collaboratively with artists and agents. "We still operate too short term," he said. "Our job is to build partnerships that work strategically – not just for the next show but for the next decade."

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