A report into the impact of folk festivals on cultural tourism
January 2003
Introductions from the Association of Festival Organisers and Arts Council of England
Folk festivals are big business
Folk festivals attract tourists with money to spend
Folk festivals develop new audiences
Folk festivals are family friendly
Folk festivals are accessible and welcoming
Folk festivals develop people and communities
Acknowledgements

This report is based on an independent research study undertaken by Morris Hargreaves McIntyre. 4,294 adult festival goers completed short questionnaires at a range of six different folk festivals in England during July, August and September 2002. A further representative, weighted sample of 450 of these adults then completed long questionnaires during October 2002. A sample of these respondents then attended focus group discussions in December 2002. Market size data was calculated from attendance records gathered by the Association of Festival Organisers.
The folk festival sector has grown incrementally over the past ten years, to the point that it’s now estimated that 350 folk festivals take place in the UK each year.

Despite much anecdotal evidence about the impact festivals make on a region’s economy, there has never been any national research done into folk festivals and the impact they have on cultural tourism. It was in this context, and against a backdrop of the recent foot and mouth epidemic, which made a significant impact on the sector, that the Arts Council of England developed this project with the Association of Festival Organisers.

The research carried out by Morris Hargreaves McIntyre demonstrates the sheer volume of folk festival attendance, the diversity of our audiences and their dedication to the genre and the festival circuit.

Folk is no longer, if it ever was, a minority music. This report celebrates its position as an historic part of our national heritage, a hobby, a passion, an industry and clearly a source of entertainment for thousands of people. Here, we’ve demonstrated how folk festivals affect the lives of hundreds of thousands of people who take part in them, as musicians, dancers, participants, audiences and in a myriad of other ways. Perhaps most importantly of all, the report demonstrates what we’ve long suspected: that folk festivals are a key sector in the UK’s creative economy.

Our music is vibrant, energised and constantly evolving. Our festivals celebrate this success story by creating a unique and long-lasting experience for our audiences.

Steve Heap
General Secretary, Association of Festival Organisers

Some people might call folk ‘a minority music’. Asked randomly, the simple question “Do you like folk music?” might well elicit “no” or “not much” as an answer. However, more and more people are turning on to folk without realising it, and these days the number of people choosing to attend folk and acoustic music events is increasing at an amazing rate.

It’s no longer relevant to think in terms of jazz, folk, classical, reggae or garage. Music is always subject to categorisation; just think how we navigate record shops. However, the people who enjoy music have much broader tastes than to merit being labelled ‘jazzers’, ‘folkies’ or ‘opera buffs’. To say that only ‘folkies’ go to folk festivals is far too general a statement. People from all walks of life attend folk festivals, and the music as a genre spills over in all directions, attracting people who perhaps think they don’t like folk.

When the Arts Council of England’s New Audiences Programme provided us with the opportunity to study folk festival audiences a little closer, to examine the impact of our festivals on the community and measure the value to the population, the AFO jumped at the chance.

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Folk festivals are big business

UK folk festivals generate spending of over £77 million each year.

There are now over 350 folk festivals in the UK. Between them they attract over 350,000 attendances from 106,000 people, each of whom attends an average of 3.3 folk festivals per year.

Festivals help sustain the folk industry, providing performance opportunities for artists, employing support staff and providing a marketplace for a wide range of goods, from CDs to musical instruments.

But more than that, they stimulate the local economy. The festivals rely on goods and services supplied locally, and festival attenders spend significant amounts of money locally on food, drink, accommodation and other purchases.

“In festival week the town is enriched both financially and culturally. Town centre businesses and many others are boosted and benefit from the unique opportunity provided by the festival,” Trevor Roberts, Manager, Fields of Sidmouth

Folk festivals can make a huge and wide-ranging impact on the host town or village. As well as the obvious influx of visitors and benefits to the local economy, local businesses and voluntary organisations work with festivals to build lasting partnerships that benefit the area.

### Market spend at folk festivals

<table>
<thead>
<tr>
<th>Expenditure item</th>
<th>Per person* per day/night</th>
<th>Per festival</th>
<th>Total per year in UK (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tickets</td>
<td>-</td>
<td>£47.97</td>
<td>£14.69m</td>
</tr>
<tr>
<td>Travel</td>
<td>-</td>
<td>£37.06</td>
<td>£12.97m</td>
</tr>
<tr>
<td>Accommodation**</td>
<td>£10.13</td>
<td>£47.61</td>
<td>£16.66m</td>
</tr>
<tr>
<td>Food &amp; Drink</td>
<td>£8.48</td>
<td>£48.34</td>
<td>£16.91m</td>
</tr>
<tr>
<td>Other purchases</td>
<td>-</td>
<td>£45.00</td>
<td>£15.75m</td>
</tr>
<tr>
<td><strong>Total spend</strong></td>
<td>-</td>
<td>£225.98</td>
<td>£76.98m</td>
</tr>
</tbody>
</table>

*Adults and children.

**Those staying in B&B/Hotels spend £26.32 per person per night, accounting for £8.34m of the annual accommodation total.
Over 90% of folk festival attenders are tourists.

That’s 315,000 tourism visits every year.

These visitors spend an estimated 1.3 million nights away from home.

This includes up to 300,000 paid-for bed nights in hotels and B&Bs.

These paid-for bed nights generate £8.34 million spend in the accommodation sector.

The other million bed nights are mainly spent on camp sites with some people visiting friends and relatives.

17% of festival tourists stay on in the area after the festival, generating further tourism spending.

“People take the time and make it a holiday and people come from very long distances.”

Folk festival attenders come from the higher socio-economic groups.

93% of festival attenders are ABC1s.

49% are AB, the highest socio-economic group.

Festivals have a remarkable ability to retain tourism visitors and win their loyalty. Unlike much investment in tourism, investment in folk festivals results in almost guaranteed repeat business.

“I have been going to festivals for 20 years since I was 18.”

76% of attenders are already repeat visitors, with a huge 70% of those attending most years and 44% attending every year.

Once you attract a new visitor through a festival, most will keep on coming back for many years.

“Once you have caught someone as a young person then you have probably got him or her forever.”

Of the 24% trying a festival for the first time, three quarters will return.

Very few other tourist attractions can command that level of repeat visiting, which means that public money spent on folk festivals yields a higher return on investment than most other tourism events.

It’s folk festivals’ ability to get repeat tourism that makes investment in them one of the most cost-effective investments in tourism development.
Folk festivals develop new audiences

Festivals are a proven way of developing new audiences.

As a high profile showcase they attract more attention than small-scale local events. The range of music on offer gives attenders confidence that there’ll be something to their taste and the fact that someone has carefully selected that programme reassures them that the quality will be high.

Folk festivals present a myriad of music, song and dance events in a wide range of styles from many different cultures. The anticipation of making a discovery is one of the key drivers for festival attendance.

“I would go there specifically if there were people that I hadn’t heard of or for something new.”

Such discoveries lead to continued interest in a diverse range of artforms and help new artists to break through and develop.

Folk festival audiences may have favourite styles of music or even favourite artists, but festivals are more than just an opportunity to indulge familiar tastes. They encourage attenders to crossover, and try out new artistic experiences.

“You go to hear groups that you have never heard of or something that you have never known about. You can go there and try it. We have done that.”

“Festivals provide an opportunity for people from all over the country with all different styles and interests to come together and share and experience different things.”

“And seeing groups that you wouldn’t perhaps pay £12 or whatever to go and see but they are there and so you think I will try this.”

“I have certainly been exposed to music that I would not have otherwise listened to.”

“Originally I was much more of a listener but I have got much more into singing over the years and now I go to practically nothing official. I go for the singing and in the last five years that has been my main focus.”

Beyond the festival, these new interests result in significant levels of attendance at other arts events generally.

38% attend music from other countries or cultures when not at festivals.

37% attend classical music events.

27% attend jazz events.

There is a distinctly contemporary edge to many festival attenders’ interests, with 24% attending dance music events and 14% attending R&B events.
Festivals also provide an opportunity for existing attenders to bring new people along with them.

“Some friends who said ‘you have got to try this’ dragged me in.”

First time attenders report that they feel very welcome and find it easy to join in and explore what the festival has to offer.

“I went down with four or five people that had no notion of folk and they enjoyed it so much they are actually doing Morris dancing. At festivals you do find out about new things.”

“In my case a few years ago my wife died, and just to get me out of myself my daughter said come to Towersey with us, and I did and that was three years ago. I have been three times running.”

In any one year, 6% of all festival attenders are new to folk. Almost all of these return to future festivals, so effectively, the folk festival market is growing by 6% year-on-year.

A further 18% of attenders are trying a particular festival for the first time.

Festivals also stimulate the purchase of recorded music, thereby supporting artists making a living in the sector.

92% of festival attenders own folk recordings and 82% are actively still buying.

On average, they own 73 recordings each, which means that, between them, festival goers own 7.7 million recordings. That is a significant market.

92% of these collectors buy new CDs at festivals.
Folk festivals are family friendly

People find festivals accessible and family friendly. They are ‘holidays with music’.

Festival audiences are much younger than many people think. Furthermore, unlike many other music festivals, there is a real family atmosphere.

38% of festival-goers have children.

“We wanted our children to experience it and get into it and that is one of the main things that prompted us to bring them.”

32% regularly bring their children to festivals.

“All our children have been brought up with festivals and so they are very important.”

On average 29% of parties attending a folk festival include at least one child.

20% can only attend festivals in the school holidays.

12% will only attend if good children’s facilities and a full children’s programme is provided.

“A really good thing about it this year was the series of workshops for young people under 18.”

20% of all attenders are aged 19 or under, of whom 13% are aged 14 or under.

“My children now go to festivals on their own.”
Folk festivals are accessible and welcoming

People who have never been to a folk festival can sometimes have pre-conceptions about who it’s for and what it will be like.

A common assumption is that it will be dominated by middle-aged men. This out-dated image couldn’t be further from the reality of modern folk festivals.

“It was a revelation. I didn’t think I would like it but I did.”

“I thought I was a rare young musician playing folk until I got to the festival. In the lunchtime you can see all the young people playing in the pubs.”

Here are the facts:

45% of attenders are under 35 years old.

13% of attenders are older teenagers between the ages of 15 and 19.

52% of attenders are women.

Although folk festival attenders are certainly knowledgeable and committed, attending a festival as a novice is not a daunting or intimidating experience.

“As soon as I came I felt at home because it is full of people like me.”

“A friend said ‘would you like to come with us?’ So I went there and I got there on the Wednesday and I didn’t stop dancing, seriously.”

There are many participatory events programmed specifically for beginners, and, unlike some other music festivals, the general ambience and atmosphere is friendly, open and welcoming.

“If I was in a local folk club I would feel intimidated and think ‘they all know what they are doing and I don’t’, whereas with a workshop you are all mucking in and if you get it wrong it doesn’t matter.”

This sense of ‘family’ and ‘community’ means that 11% of all attenders are happy to attend on their own, confident that they will feel welcome and accepted.

“Once you pitch your tent you just spend the next two hours saying hi to people. You meet people year after year, and you will not see them any other time, but you will always see them at the festival.”

“If you go down the pub on a Friday you just spend the entire evening just catching up with the people you haven’t seen since last year. You may not know where they live, but you know you are going to see them down there.”

Folk festivals are also accessible financially.

87% of attenders think that folk festivals represent value for money.

39% think they represent excellent value for money.
Folk festivals develop people and communities

Folk festivals change people.

They bring people together and for a few days get them to live, learn and enjoy themselves together.

In the regional events calendar, festivals often represent the major highlight. People who would not have sought out folk events are often attracted by the spectacle. Events stimulate new interests, workshops build confidence and teach new skills. Friendships are forged, contacts are made. Budding musicians, singers and dancers are born.

“It is a wonderful place to make new friends and it encourages me to carry on playing and then to go to smaller events.”

“One of the workshops got me into actively singing.”

60% of festival attenders can play a musical instrument.

27% have the skills and confidence to play in a public performance. However the vast majority participate during a festival by singing, dancing or playing a musical instrument.

“I really enjoy festivals generally. If it weren’t for festivals I wouldn’t be in the band now.”

“There are always the expert players who will come on and sit down next to you and listen to you and give you a bit of advice.”

A further 33% have learned to play for personal pleasure.

“That is what the camp site is like. About 2.30 in the morning, everyone gets a coffee and sits around and plays. You might have a double bass and some cellos and eight fiddles and you might get children playing tin whistles.”

Another 14% would like to learn to play and see festivals as a way to learn.

Surely now the point is made. Folk music and folk festivals are key to the socio-economic and cultural life of our communities. Please use this report and these figures whenever there is doubt. Work together, gather the audience and celebrate the music.

Steve Heap, General Secretary, AFO.
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www.newaudiences.org.uk

It was managed, on behalf of the AFO, by the hub.
www.thehubuk.com

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www.lateralthinkers.com

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Working for and with festival and event organisers.
Supporting live music, dance, song, arts, crafts and theatre.

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