



The Association of Independent Festivals Forecast 2023



Who is AIF?

The Association of Independent Festivals is the Not For Profit Trade Association for Independent UK Music Festivals. Our mission is to represent, empower and provide a vital support network to our unique collection of 105 member festival organisers.

We foster a unique network of promoters and facilitate them to connect with each other and take the temperature of the industry. We run campaigns and advocate for our members, providing a collective

voice for the independent festival sector to Government, key organisations and partners, the media, and wider industry.

We provide business and best practice support with training, seminars and events, including our annual flagship Festival Congress which takes place pre-season each February.

We are governed by a Board of 13 member festivals. The current Board is comprised of:

Matthew Phillip (Notting Hill Carnival) – Chair

Nick Morgan (We Are The Fair) – Vice Chair

Alex Trenchard (Standon Calling)

Joe Barnett (New Bohemia Music / We Out Here)

Jon Walsh (Shambala)

Kate Osler (AEI / El Dorado)

Katherine Goodenough (Greenbelt Festival)

Lauren Down (End Of The Road)

Rebecca Ayres (Liverpool Sound City)

Stefan Poleman (ZEN Fest)

Steven Campbell (Eskimo Dance)

Suze Bayliss (Vision Nine / Boardmasters / NASS)

Zac Fox (Kilimanjaro)





AIF Members

AIF currently represents these 105 festivals and events.

- 110 Above**
- 2000 Trees**
- Ampthill Festival**
- ArcTangent**
- Are You Listening?**
- Barn On The Farm**
- Beat Herder**
- Belladrum Tartan Heart Festival**
- Big Burns Supper**
- Black Deer**
- Bloodstock**
- Bluedot**
- Boardmasters**
- Boomtown**
- Camp Wildfire**
- Cheltenham Festivals**
- Colin's Barracks**
- Deer Shed**
- Defected London**
- Detonate**
- Deva Fest**
- Dot To Dot**
- Down At The Abbey**
- Eisteddfod**
- Genedlaethol Cymru**
- El Dorado**
- Elderflower Fields**
- End Of The Road Festival**
- Eskimo Dance**
- Fairport's Cropredy Convention**
- Field Maneuvers**
- Fire In The Mountain**
- Forbidden Forest**
- Forwards**
- Gloworm**
- Gorilla Events**
- Green Gathering**
- Greenbelt Festival**
- Hanwell Hootie**
- Harrogate**
- International Festival**
- HebCelt Festival**
- Hospitality Weekend**
- In The Woods**
- ILOW**
- Kendal Calling**
- Kew The Music**
- King's Jam Festival**
- Let's Rock**
- Liverpool Sound City**
- Leopalooza**
- London Remixed**
- Long Division**
- Lost Village**
- Love Saves The Day**
- Love International**
- Love Trails**
- LS Events**
- Meltdown**
- Mighty Hoopla**
- Mostly Jazz Funk & Soul**
- Mutations**
- NASS**
- Noisily Festival**
- Notting Hill Carnival**
- Nozstock: The Hidden Valley**
- On The Beach**
- Party At The Palace**
- Pennfest**
- Pete The Monkey**
- Pitchfork London**
- RADAR Festival**
- Readipop**
- Rebellion Festivals**
- Rhythmtree**
- Rise Festival**
- Rock Oyster**
- Sensoria**
- Shambala**
- Shindig Festival**
- Slammin' Events**
- Snowbombing**
- Standon Calling**
- Starry Skies**
- Swn Festival**
- Takedown Festival**
- The British Music Country Festival**
- The Kings Jam**
- The Wylde**
- Towersey Festival**
- Tramlines**
- Truck Festival**
- Twisterella**
- UK Tech Fest**
- Underneath The Stars**
- Urdd Eisteddfod**
- Valley Fest**
- Victorious Festival**
- Visions**
- Warm Up Festival**
- Waterworks**
- We Are FSTVL**
- We Are The Fair**
- We Out Here**
- Wibbly Woods**
- Wild Paths**
- YNot?**
- ZENFest**

Leading The Festival Sector

AIF partners with organisations and events to set the bar in best practice when it comes to delivering festivals.

OUR CURRENT PARTNERS :

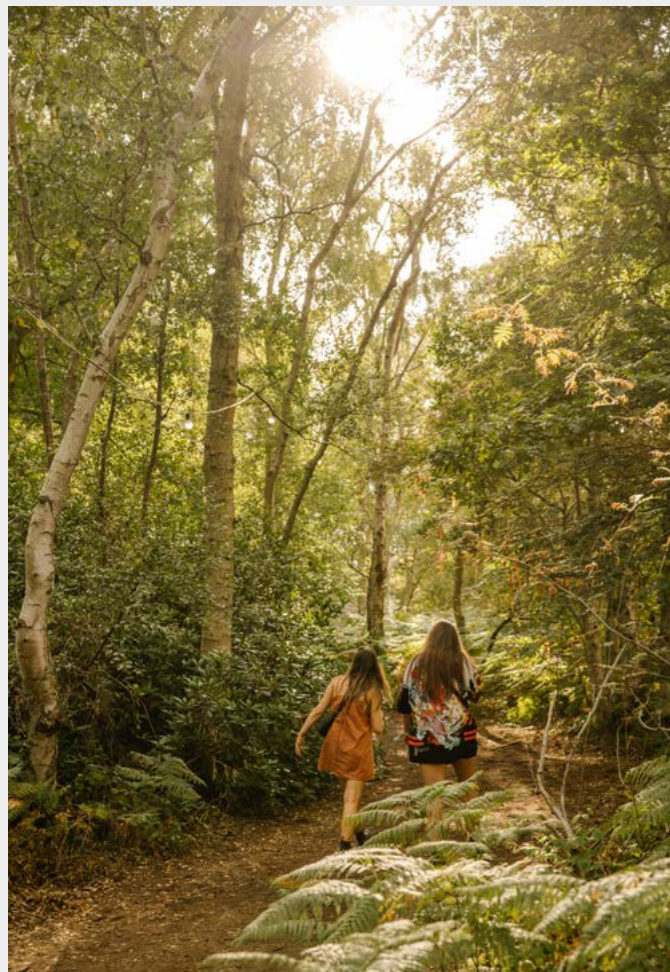
Climate Action

Vision 2025. A network of over 500 outdoor events and businesses taking climate action with tools and resources to support change. AIF CEO John Rostron sits on the Vision 2025 advisory Board.

A Greener Future. A Greener Future is a not-for-profit company, committed to helping events, festivals and venues around the world to become more sustainable and to reduce environmental impacts. AGF provide certification, training, expertise, and facilitate the exchange of best practice.

Music Declares Emergency. Music Declares Emergency is a group of artists, music industry professionals and organisations that stand together to declare a climate and ecological emergency and call for an immediate governmental response to protect all life on Earth.

Cur8. Cur8 is dedicated to raising the bar on Carbon removal.



Equality, Diversity, Inclusion

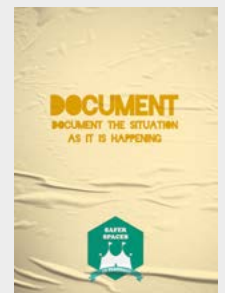
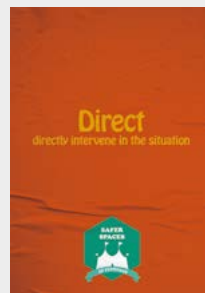
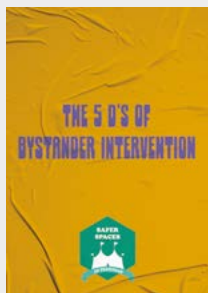
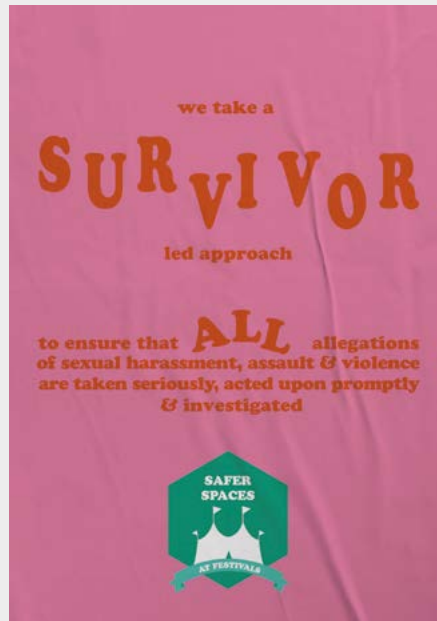
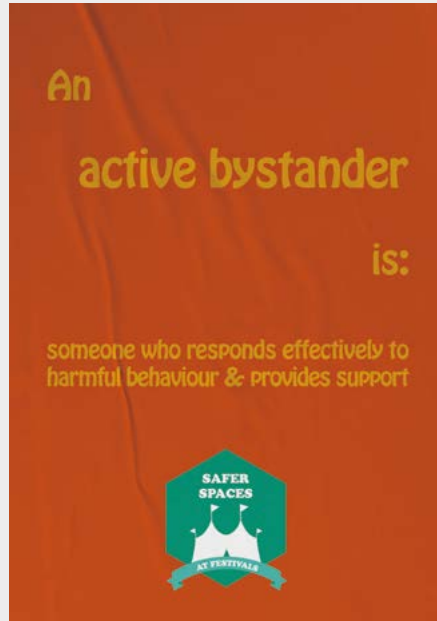
Vick Bain. During 2023 the AIF team and Board has been working with Vick Bain to develop an EDI Policy and Action Plan. This will be published shortly.

Black Lives In Music. Black Lives In Music is made up of a number of partners with the same goal : to dismantle structural racism in our industry.

Attitude Is Everything. AIE connects disabled people with music and live event industries to improve access together.

Music Support. Provide help and support to peers who work in music and live events affected by mental ill-health and/or addiction and to promote early intervention through support services, education and workshops.





Safer Spaces

AIF delivers the Safer Spaces campaign, tackling sexual violence, harassment and assault at Festivals. It is led by a steering group with partners including Rape Crisis England & Wales, Good Night Out, Safe Gigs For Women, Galop, Girls Against and UN Women. The Safer Spaces 2023 Campaign launches shortly. More on Safer Spaces at aiforg.com/initiatives.

Events

International Festival Forum. 26–28th Sept 2023, South London.

The Showman's Show. 18th and 19th October 2023, Newbury Showground.

The Events Summit. 1st November 2023, Manchester

Event Buyers Live. 13–15th November 2023, Carden Park, Cheshire.

Access All Areas Conference & Awards. 16th November 2023, London

The LIVE Awards. 12th December 2023, Troxy, London

National Event Catering Expo. 30–31 January 2024, NEC, Birmingham.

Festival Congress. February 2024, Bristol

Event Production Show. 28–29 February 2024, ExCel, London.



Friends of AIF

These businesses and organisations reach our membership through our Friends of AIF Scheme, working with many of our festivals and supporting AIF in the process.

Amplead Providing a tool kit for the live music industry.

Azorra Legal and Business Affairs for Festivals, Live Music, Events, Venues & Sport

BEStructures Festival Staging

BioGlitter The world's only certified fresh water biodegradable glitter

CTM Event Traffic Management

Different Sauce PR, Tik Tok & Playlist Strategy That Empowers Artists and Events

Easol All in one platform for selling experiences

Event Bars Bespoke bar management and implementation consultancy and provider.

Gigantic Ticketing.

Gigseekr Live Music Discovery

ID&C Wristbands, lanyards and passes

Ingenuity Brand and Marketing Partnerships

Kaboodle Ticketing

Laceys Solicitors Licensing Legal Advice

Lewis Silkin Legal Support

Media Insurance Brokers Insurance Brokers

NCASS Catering Association

NEC Birmingham National Events Centre, Birmingham

NoNonsense Group Staging and Temporary Structure

Out Of Hand Flyer, Poster and Leaflet Graphic Design, Print & Distribution

Safe Elephant Entertainment Safety Consultancy

Silent Disco King World's Largest Silent Disco Supplier

Steeldeck Stage and Seating Hire

The Canvas Co Luxurious Tented Accomodation for Festivals and Private Parties

The Showman's Show & Directory Comprehensive Exhibition of Products, Services and Entertainment for the festival, outdoor and special event industry.

Ticketsellers Ticketing

Tickets For Good Free and Discounted Tickets for NHS Workers and Charities

Tixel Honest marketplace for ticket resale

Tysers Insurance Brokers

Vintents Upcycled Vintage Tents for Luxury Glamping

Weezevent Ticketing and cashless payment.

You.Smart.Thing Travel Demand Management Platform





2023 in Numbers

Economic Forecast

The forecast impact of AIF members for 2023 :

Methodology : Survey of AIF members, April 2023

£195m
forecast gross
revenue for AIF
Festivals

£177m
forecast gross
expenditure
for AIF
Festivals

Analysis

1. AIF Members' economic contribution to the music sector and supply chain is significant - equivalent to almost 50% of all Grassroots Music Venues combined. (source MVT Annual Report 2022)
2. Margins are tight. The rise in supply chain costs (energy; production; staging; security - has become untenable, with increases over 30% since 2019, and in some areas as high as 80%). There's been an attempt to mitigate this a little by a necessary increase in ticket prices (up around 12% since 2019) but festivals have been unable to cover the huge increases nor were they able to budget or cover for inflation when ticket prices were set and went on sale.
3. Risk is now VERY HIGH. Festivals are increasingly costly to produce. Expected returns if events do breakeven are very reduced.



Supporting Artists and the Music Industry



£36m

The spend from AIF members on music talent this year.



11853

The number of performances for artists created by AIF member festivals.



£2.9m

expected to be paid to PRS to distribute to songwriters and copyright holders.



3951

concerts with three acts on each bill



filling **11** venues for an entire year

Supporting Audiences

AIF events will attract audiences of

3.3m

1.3m

AIF members ticketed events will attract almost 1.3m people in 2023

2m

AIF members unticketed events will attract 2m people this year



Musicians On Stage 2023

AIF Festivals commitment to improving representation for women on lineups leads against all other groups of festivals. (reference recent Sky News data and report [here](#))

- **74% of our members have some female headliners.**
- **15% have a 50/50 male / female split.**
- **4% have 65% in favour of female.**
- **4% are 90% female lead with headliners.**
- **One event has all non-male headliners.**

When it comes to headliners across ALL stages, the picture is better again.

- **93% have some female headliners**
- **19% of members have a 50/50 split across all stage headliners.**
- **5% of the membership gets as high as 70/30 in favour of females.**

Across all musicians on stage (ie supporting artists and headline artists) across all slots on all stages it improves further again.

- **20% have a 50/50 split across their entire line up.**
- **15% have a 55/45 split in favour of female headliners,**
- **3% have a 60/40 split in favour of female performers.**

We will do a deeper survey and insight into gender on stage and back of stage later this year.



2023 Issues and Solutions

ISSUE : : Impact of Covid Closures on young audiences.

Festivals did not run in 2020 or 2021, and many that took place in 2022 did so with the majority of sales from 2019 audiences. As a result, many young people – particularly those aged 16-19 – did not get to attend their first festival. This has had a huge impact on the sector. Young people have not experienced the rite of passage that so many of their predecessors have experienced. They have not joined festivals mailing lists and communities, and so are not engaged in buying tickets or on ticket payment plans. They have missed a pivotal cultural moment that so many others have been able to experience.

SOLUTIONS :

AIF will launch a major public facing campaign and seek music industry, third sector organisation and Government support to address this issue which has impacted younger audiences and almost all UK festivals.





ISSUE : Rise in supply chain costs

The well-documented rise in supply chain costs, coupled with inflation, is a major issue affecting all festivals. Festivals set ticket prices and go on sale up to one year in advance of their event, so are unable to mitigate unexpected rises with additional increases in ticket prices. Huge rises in costs are having a devastating impact on the sector.

SOLUTIONS :

AIF will continue to lobby for a reduction in VAT from 20% to 5%. Where currently festivals are having to cut back - on infrastructure, artists and personnel - a reduction in VAT will mitigate the rise in costs, enabling the festival sector to expand and pursue growth.

ISSUE : Cost of Living Crisis

The cost of living crisis has impacted audiences disposable income, and there is evidence of some individuals who are not able to attend a festival this year as a result. There's also new evidence where some audiences who would go to multiple festivals though the year are now reducing the number they can attend.

SOLUTIONS :

Festivals have reacted quickly to this issue, and there has been a strong uptake in payment plans this year, with many extending the period over which audiences can purchase tickets. This has helped support audiences in spreading the cost into manageable monthly amounts.

However, there remains a gap. AIF will launch a public facing campaign and seek Government support to help those who have been left behind by this current economic situation.





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