

**Written evidence submitted by Bournemouth 7s Festival, South Coast Events Forum and National Outdoor Events Association**

Wednesday 2<sup>nd</sup> December 2020

Dear Mr Knight & Colleagues,

**RE: The Future of UK Festivals**

It is fair to say that 2020 has been abysmal for us all. An 'unprecedented' jolt to the economic, societal, cultural, behavioural and personal structures we have all become so accustomed to, Covid has forced us to face realities none of us ever felt possible and find resilience we didn't realise we had.

We applaud, to the rafters, the medical professionals, key workers and front-line staff who have guided us through the pandemic. We know that the impacts of this fateful virus have been far-reaching, uniquely challenging and of a scale that blows the mind. We know that our negative experiences are shared by entire communities and we would never seek to monopolise the negative impacts felt by so many.

The UK Festival Industry, though, has been rocked to its very core by this virus. As one of the very first sectors to close and seemingly one of the last to re-open - our community of event organisers, suppliers, freelancers, volunteers and entertainers have effectively been closed or out-of-work since March 2020.

Whilst we have watched our friends and colleagues across hospitality re-open and trade at significantly reduced levels – we have remained closed. Confronted with ongoing overheads but reduced to zero income, many of those people who work in our sector have already left and many businesses have closed their doors for the last time.

Yet, from the ashes of 2020, we have seen a spirit of collaboration, openness and positivity emerge. The sector has pulled together to share experiences, good and bad, to lobby for support and to increase recognition and representation of our beleaguered sector.

From the outset of this virus, I have believed – wholeheartedly – that the events industry and particularly the festival sector can be a vehicle to which the re-imagination of our society can be hitched. We provide unique and memorable experiences for millions, we keep many hundreds of thousands of people in work and we foster a positive mental approach that has never been more crucial.

It is for these reasons that I submit this evidence to the Department for Digital, Culture, Media & Sport on behalf of our festival and the supply chain who have been so severely impacted.

It is for these reasons that I ask you to consider our situation properly and to think about the support and guidance which we need to allow us to re-emerge in 2021, hopefully stronger for the experience.

I sincerely hope to meet you or colleagues in a field next summer.

Yours sincerely,  
Craig Mathie

**Managing Director:** Bournemouth 7s Festival • **Vice President:** National Outdoor Events Association  
• **Founder:** South Coast Events Forum

## **Executive Summary**

The UK Festival industry has taken an unprecedented beating.

But, we're resilient, positive and unbelievably driven.

Please work with us to secure a crown jewel of the UK's cultural DNA.

## **Introduction to the Author, Craig Mathie:**

**I submit my evidence to the DCMS Committee as Managing Director of the multi-award-winning Bournemouth 7s Festival.**

Alongside this role I am a current Vice President of the National Outdoor Events Association and founder of the South Coast Events Forum. I do not submit evidence on their behalf but mention my involvements to demonstrate my understanding of the collective impact across our industry.

A self-confessed events geek, I joined the Bournemouth 7s Festival team as its most junior member in 2011 before progressing through the ranks of the independently owned sports & music festival business. I was appointed Managing Director in October 2016.

I am Trustee of, sporting charity, The Steve Bernard Foundation and Ambassador for Dorset Mind – the mental health charity for Dorset. I sit on the Destination Management Board for Bournemouth, Christchurch and Poole which works to create a collaborative tourism strategy across the conurbation.

### **Bournemouth 7s Festival**

[Bournemouth7s.com](http://Bournemouth7s.com)

Bournemouth 7s Festival is the UK's largest multi-sport and music festival welcoming 400 sports teams and 30,000 festival goers over the Spring Bank Holiday each year. Launched in 2008, the festival is independently owned and managed by a full-time team of 6 staff who work year-round on the festival.

The multi-award-winning festival, which has been profitable in each year and has grown organically since launch, employs some 1,200 staff and offers significant financial benefit to the local economy each year.

By day, some 5,000 sports people take part in more than 40 tournaments in rugby union, netball, hockey, volleyball and dodgeball whilst, by night, the festival offers a range of live and recorded music entertainment across 12 creatively themed festival arenas.

### **National Outdoor Events Association**

[NOEA.org.uk](http://NOEA.org.uk)

The National Outdoor Events Association is the UK's leading outdoor events trade association. The association is dedicated to enhancing professionalism in the outdoor events industry through education, networking, lobbying, advice and creating business opportunities.

The NOEA membership is comprised of event suppliers, event production professionals, event and festival organisers, entertainment agencies, local authority events departments, venues, universities and freelancers.

I first joined the board of NOEA in November 2018 and was recently elected as Vice President holding responsibility for areas including mental health, partnerships and elements of social media.

### **South Coast Events Forum**

[Southcoasteventsforum.com](http://Southcoasteventsforum.com)

The South Coast Events Forum was formed during the Covid pandemic to bring together events professionals based across the South Coast to increase our recognition, develop representation and drive professional standards across the industry post-Covid.

Managed by an entirely voluntary board, the forum shares ideas, experiences and best practice as we seek to emerge as a stronger and more unified industry with input into local and regional strategy.

## 1. What is the economic and cultural contribution of the UK's festival industry?

The festival and concert industry was worth **£2.6 billion** to the UK economy in 2019 (1) with **26%** of British adults attending a music festival in 2019.

According to the same research, **49%** of 'Generation Z' consumers (aged 16-19) and **43%** of 'millennials' (aged 20-39) took the opportunity to attend one of over 1500 festivals which take place across the length and breadth of the UK.

The Events Industry Forum, based on research undertaken by Bournemouth University, suggests that more than **141.5 million** people attended outdoor events in 2018; spending more than **£39.5 billion** in a sector which employs **589,000** people. (2)

At the highest level, the Business Visits & Events Partnership reports that the events industry contributes more than **£70 billion** to the UK economy each year – employing some **700,000** people in total (3). This figure increases to £84 billion when weddings are included.

These numbers though are only part of the picture. In my opinion, the true value of the UK Festival Industry is almost impossible to quantify. The best way to try and ascertain this value is to ask a friend or family member about their best festival memory – the odds are some of them will have taken in at least one of the UK's outstanding festivals at some point in their life.

Their stories will, in all likelihood, take you back to an immersive moment in time where they were surrounded by like-minded people with shared passion, shared interest and shared experiences. In a world of innovation and creative freedom – festivals can be anything which you want them to be.

This value is intrinsic to our offering and demonstrates so clearly why we must be supported until we can next do our thing. We have never needed help before; as an industry we have been self-sufficient for decades and have never relied on government support or grants to survive.

The UK is the spiritual home of festivals. From music to arts and culture; food and drink to sports – festivals offer something for almost everyone. They are intertwined into the British Summer and are one of most loved but, in my opinion, least celebrated cultural components.

Finally, the UK events industry is proudly and globally recognised as genuine world leader in delivery, production and safety. Our supply chain offers an unrivalled level of knowledge and expertise in delivering live events and leads on similar events across the globe.

## 2. What has been the impact of cancellations on local economies and those who derive income from festivals during 2020?

The impact of festival cancellations has been nothing short of catastrophic for the entire sector because:

1. Unlike many other industries, festival organisers do not make money on the day they open. In reality, our festival's income is not realised until the event itself has taken place.
2. We have received no real income since the Autumn of 2019 and look unlikely to receive any significant income until Q2 of 2021.
3. Very little government support has made it through to the supply chain and whilst some festivals received Culture Recovery Fund Grants, this was limited to a small selection of festival operators.

98.5% of festival organisers were unable to claim on festival cancellation insurance. (4)

At Bournemouth 7s Festival, we run one festival per year and our full-time team of 7 people is dependent on the festival each year in order to maintain their livelihoods. We have been successfully and profitably delivering the Festival each year since 2008.

This year, our business owners have personally invested over £500k into the business in order to keep our team employed and the business afloat. Without this direct support, our business would inevitably have been forced to fold.

In addition to our directly employed team, more than **1200** people work on our festival each year. We are just one medium sized festival in an industry of more than **1500** festivals; all of whom will have had comparable impact on their supply chain.

The figures referenced in this infographic only take into consideration the people directly employed by the festival during the build, break and live event phases.

They do not take into consideration the wider impact on the economy in areas such as:

- Hotels & Accommodation
- Hospitality & Eating Out
- Transport & Travel
- Food, Drink & Retail

The flow of finances through the UK festival industry has been affected in the following ways:

- Ticketing agents have, in most cases, stopped issuing funds to event organisers and promoters in case they need to refund money to consumers.
- Any income received has either been refunded to consumers or ring-fenced in case of future cancellations.
- Festival promoters are therefore unable to support the industry supply chain by paying deposits, generating a flow of income through the sector.
- Festival promoters have no work for the freelancers who are the secret warriors and workhorses of our powerful industry.
- Promoters, suppliers and agencies have been forced into redundancies in order to remain afloat with some of the biggest operators forced into closure or liquidation.

### **3. What are the risks to festivals taking place in 2021 and beyond, and how can these be mitigated?**

The single biggest risk to the majority of UK festivals, including our own, is that social distancing measures remain in place in next year's festival season (May - September) as festivals **cannot** operate in a financially viable fashion with reduced crowd numbers.

A further significant risk is that our well established and considered approach to risk management continues to be pushed sideways. Festival organisers, along with the entirety of the UK events

industry, are incredibly well versed in conducting risk assessments for their event. From bad weather to terrorism, we have confronted a plethora of risks over the decades and always sought to balance the likelihood and severity of that risk in safely managing our events.

Currently, and justifiably, the risk presented by Covid-19 is being placed above almost all other health and welfare considerations. As more is understood about the virus and the science which underpins it, this approach must be adjusted so that our mitigations are appropriate to the risks presented by our particular events. In short, we must be able to do what we have always done.

One of the greatest fears for us as an event organiser is that we invest more than £1 million in planning our event, securing infrastructure and supporting the supply chain only for the event to be pulled at the last minute by the local authority with no insurance protection for this possibility.

The event supply chain has already taken a significant hit with a number of companies going out of business. A real risk for 2021, if this chain is not supported moving forwards, is that there will be no supply chain when we are ready to deliver festivals again. For this reason, they must be considered immediately.

There appears to be very little uniformity between the approach of local authorities across the different areas of the country. A standardised approach to the Safety Advisory Group (SAG) process and its interpretation of the guidance must be agreed and implemented by industry and statutory bodies.

We, as a business, would not survive being cancelled at the last minute in a macro situation which is, at present, uninsurable. This presents a real risk to our event and the balance of the UK Festival sector.

It is my personal opinion that there will be no issues with regard to consumer demand post pandemic. Anecdotal evidence from various ticketing agencies has shown that demand is strong and, as soon as we are allowed to re-open, UK Festivals will bounce back with a vengeance.

#### **4. What measures are needed for audiences to attend festivals without social distancing, and how realistic are they?**

In order for Bournemouth 7s Festival and the wider UK Festival Industry to return, we believe that the following measures need to be put in place:

##### **Vaccine**

The work on a vaccine is being undertaken by far more qualified experts than myself so I will not seek to comment on the status and standing of the various programmes being undertaken in the UK and across the world.

It is fair to say however, that the UK Festival market would benefit from a wide-ranging vaccination programme and the benefits this would have on public health, confidence and resilience as we return to 'normal'.

##### **Mass testing**

As suggested by Melvin Benn, in the Full Capacity Plan (5), a huge opportunity exists for the UK Festival industry to work in partnership with wider testing programmes.

The plan suggests that festivals could be used as an incentive to undertake testing whilst a rapid response testing scheme would ensure that attendees of an event do not have Covid and therefore do not present a risk to fellow attendees. The UK's resource of rapid responses tests should be used to support the festival and events industry to get back to work.

### **Greater engagement between festival organisers & local authorities**

A well established multi-agency approach to managing and delivering festivals must be enhanced as a result of managing the impact of Covid. In reality, this is already happening and we have already had direct contact with SAG members about the impact of Covid on our plans for 2020.

This process must, as suggested by new guidance, include the integration of local Public Health Directors into the SAG process and the further consideration of public health into the event management process.

### **Change in approach to risk management**

Once the pandemic is brought under further control by the actions of the public under the guidance and instruction of the UK Government, a need to consider the risk of the virus appropriately will be required.

Covid should be considered in line with the other risks which festival organisers consider through their industry leading approach to safety management.

### **Follow Event Industry Guidance**

The Covid pandemic has brought industry experts together in a collaborative and positive fashion, the like of which we have not seen before.

Event organisers such as ourselves must consider the guidance issued by organisations such as the Events Industry Forum. This guidance must also be acknowledged and credited by local authorities across the country as a viable and considered standard for managing events safely, post Covid.

### **Applied risk mitigation measures**

Clearly, the risk assessment for festivals should consider measures which can be reasonably implemented to mitigate against the risk of Covid transmission and circulation at UK festivals. Practical measures to implement this will include:

- Enhanced hygiene and welfare measures
- Onsite testing systems
- Control measures implemented during build & break
- Contingency plans for non-availability of key decision makers

## **5. What has been the impact of the temporary VAT cut and Culture Recovery Fund on festivals and their supply chains, and what else can the Government do to secure their futures?**

### **Culture Recovery Fund**

As an organisation, we were heartbroken to be rejected for the Culture Recovery Fund.

Bournemouth 7s Festival, despite welcoming more than 30,000 festival guests was rejected for funding because part of our offer is sport and sport was not considered a viable cultural form for funding by the assessor from Arts Council England.

Whilst those other festival organisations which received funding were clearly very thankful for this, the reality is that this support did not go far enough to support the entire sector. Similarly, as a festival – we appear to be ineligible for the sport support fund announced in November 2020.

### **VAT Reduction**

VAT reduction on ticket purchases will be a useful source of additional revenue for our business provided that Bournemouth 7s Festival can take place in 2021. The reality is that we will see no financial benefit to income received until the event has happened and, therefore, the impact on cashflow in the short term will be limited.

VAT reductions have also been applied solely to the festival promoters and not to the supply chain. Without a functioning supply chain the festival industry will not be able to survive.

### **Further Measures**

In order to secure the future of the festival industry, I believe that the UK Government should:

1. Provide grants to those companies within the events sector who were ineligible for the Culture Recovery Fund to enable them to reach next Summer.
2. Broaden the national and regional support mechanisms to include the event supply chain as well as cultural organisations.
3. Continue to work on a targeted re-insurance underwriting system which would give some confidence to the entire festival industry and its supply chain.
4. Work with the festival industry to confirm a re-start date for the 2021 Festival season

We thank the government for nationwide support and have made use of the Coronavirus Job Retention Scheme (CJRS) and discretionary grants administered by our local authority. The reality is that this support has enabled us to survive until now but it does not appropriately reflect the fact that our sector will have been closed for over a year by the time we begin delivering events again in 2021.

## **6. How has the structure of the UK festivals market evolved over recent years, and what has this meant for consumers, artists and the wider industry? What further changes might be anticipated?**

In the past decade, the UK Festival scene has exploded. Since we launched Bournemouth 7s Festival in 2008, the number of UK Festivals has almost doubled with more than 1500 events taking place during the summer of 2019.

This can be attributed to a variety of macro factors such as the decline of the night time economy and transition of promoters from fixed venues to greenfield sites. Concurrently, the rise of online streaming services has meant that artists can rely less on audio sales and, therefore, need to



monetise public performances. In some instances, this has seen the development of a homogenous line up across the festival industry - something which, in my opinion, should not be encouraged.

Alongside traditional music festivals, events have broadened their content and now cover a wide variety of areas of interest including health & wellbeing, mindfulness, food, drink, cars, sport, religion and culture, to name just a few.

As a result of the increased success and profile of the festival industry, a significant amount of merger and acquisition activity has taken place and increasing portions of the sector are being purchased by big, largely American, entertainment groups.

These major festival operators have made it increasingly challenging for small independent festivals, mainly operating in the music sector, to compete in areas such as programming exclusive and innovative content. Even at our festival, which has a relatively small line up, regional and national exclusivity clauses with acts can be prohibitive and difficult to work around.

Furthermore, the power of artists and their agents has become significant and can lead to excessive charges being levied in order to secure a line-up. During profitable years, this is an acceptable risk but if festival promoters get their booking slightly wrong - it can lead to the rapid demise of these small businesses.

The constant improvement of safety regulations with new standards such as Construction Design & Management (CDM) has driven a constant increase in safety management across the festival industry. The excellent standards to which the vast majority of organisations operate have clearly contrasted against the small number of illegal mass gatherings which have occurred during lockdown.

With that said, the growth and expansion of the sector has, in my opinion, been an incredibly positive thing for UK festivals. Growth has driven innovation and creativity to a new level and placed the UK at the very top of the global festival market.

Whilst other countries have flagship festivals, the breadth of the UK Festival market is unparalleled. We remain the spiritual home of the festival and, provided we are supported through this situation, will continue to contribute economically and socially for decades to come.

## **7. How can festivals be supported to reduce their environmental impact and also tackle the dangers of illegal drug use?**

Response by: Paul Ashurst  
Events Director

Our team and festival are incredibly proud to be based on the stunning South Coast. We feel blessed to represent our unique Sport and Music Festival and that it is located within one of the most beautiful areas of the country.

Naturally being situated in such an area, brings together a collective consciousness to environmental well-being which is shared across our conurbation. We rely on the environment to create a world class sport and music festival; our venue setting plays an integral part in creating the unique atmosphere that forms lasting memories for our fans and therefore we recognise that we have an opportunity through our festival to not only inspire visitors through Sport, but to highlight and raise awareness of the increasing environmental and sustainability concerns shared worldwide.

Our team is committed to reducing the environmental impact of our festival, taking care of the community in which we operate and doing our part to curb the harmful impacts of global climate change.

Specifically, over the past few years we have therefore supported various Industry campaigns, such as the AIF's Drastic on Plastic (2018) and Take Your Tent home (2019) campaigns as well as signing up to Festival Vision 2025, and working towards the assessment criteria for accreditation by the AGF (A Greener Festival).

All of which are not just one-offs, sustainability is firmly cemented within all aspects of the festival planning process annually working against the sustainability goals set out within the sustainability policy.

Moving forwards, education and information must be at the forefront of raising environmental awareness quickly. With technology advances moving exceptionally fast, it's becoming ever more important to be able to communicate to a wider audience quickly. Particularly in educating the younger generation with factual information and we can therefore reach out to our audience, within a social setting that is much more relatable, whilst providing an experience that they will REMEMBER. We represent a voice that our customers and fanbase trust.

I would ask that the DCMS can help by simply sharing information better to relevant industry bodies specifically in regards to future government environmental priorities and legislation by of which we are all governed by, but not always fully informed. However, no matter how futuristic our team's environmental aspirations are, this still must be underpinned and funded by the privately owned independent business that we are. We are therefore ultimately determined by the commercial success of the Festival, which as many across the industry know, is very turbulent and a sector that notoriously works off very slim profit margins throughout the entire supply chain. We can therefore, only do as much as is financially viable for the business.

I firmly believe that Bournemouth 7s stands as a one-of-a-kind festival, in a league of its own. We are **NOT** just another music festival. We celebrate and encourage sport from our very core, with 5 sports all including elite and social competitions and over 1600 matches played over one weekend. We honour and recognise the importance (particularly after a pandemic) of togetherness, team work, social collaboration and being there for one another of which anyone who has been involved within team sports will understand. Surely, now more than ever (when safe to do so) we should be encouraging social interaction and the vital role that sport, and Festivals play with combatting not only mental health, but physical health and the natural desire as humans we have to interact.

With regard to illegal drug use, we work incredibly hard with local authorities to promote and enforce a zero tolerance approach to this area. Fortunately, owing to the sporting side of our unique festival, we see fewer issues than other festivals.

We do however acknowledge the growing prevalence of drugs particularly amongst the younger elements of society and understand that, as an event organiser, we cannot expect to be isolated from these risks which are covered thoroughly in our event and crowd management plans.

We, alongside every other festival operator in the UK, understands the importance of the role we have to play in highlighting the dangers of illegal drug use to our audience and, furthermore, the role we play as a significant event within our local area.

## References:

- (1) <https://www.mintel.com/press-centre/leisure/raving-mad-uk-music-festival-attendance-at-highest-level-in-four-years>
- (2) <https://www.eventsindustryforum.co.uk/index.php/contributing-billions-to-the-uk-economy>
- (3) <https://www.businessvisitsandeventspartnership.com/research-and-publications/latest-research/802-bvep-launches-report-focused-on-70bn-events-industry-2>
- (4) <https://www.musicbusinessworldwide.com/uks-aif-warns-of-independent-festival-sector-collapse-without-urgent-government-support/>
- (5) <https://www.festivalrepublic.com/news/full-capacity-plan>