

Written evidence submitted by Sheffield City Region Music Board

Submission to the Department for Digital, Culture, Media and Sport Inquiry into the Future of UK Music Festivals

This submission to the DCMS' inquiry into the future of UK music festivals is submitted on behalf of the Sheffield City Region Music Board. The Board welcomes the opportunity to respond to this call for evidence and has provided responses that are the most pertinent to South Yorkshire as well as providing additional comments that the Department may find insightful. The submission has been informed by evidence provided by a number of South Yorkshire based music festivals.

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Introduction

South Yorkshire is home to many world-famous bands and artists, festivals and iconic music venues. To support the sector, in 2018, Sheffield City Region Mayor Dan Jarvis MP, MBE established the Sheffield City Region (SCR) Music Board. Working in partnership with UK Music, the Board brings together artists, venues, music businesses, music hubs, local authorities and festival organisers to

the Music Board is made up of public and private sector representatives including the Mayor, music hub leads, MPs, councillors and representatives from the region's music festivals, venues and businesses. The Board aims to help shape and grow the region's music industry. and promotes the interests of music festivals, record labels, musicians, composers, producers, promoters, venues and more.

There are at least 26 music festivals¹ in South Yorkshire (covering Sheffield, Barnsley, Doncaster and Rotherham, an area with a local population of 1.8 million). UK Music reported² an £8.2 million box office spend at South Yorkshire music festivals in 2017 (a conservative baseline figure) and the region has welcomed more start-up festivals in recent years: the number of music festivals in South Yorkshire has grown from 17 festivals in 2015 to 26 in 2019.

This pattern of growth is in line with national trends; UK Music reported an increase in attendance of 6% in 2019³. South Yorkshire includes a mix of urban multi venue, community

¹ See Annex 1

² [Sheffield City Region Music Report 2019](#)

³ [Music by Numbers 2020](#)

festivals and green field sites. The music festival sector can claim a huge contribution to the local economy but also offers significant cultural and social benefit.

Summary

1. The economic and cultural contribution of South Yorkshire's festival industry.

Economic Contributions (direct & indirect)	
Employment	Festival core staff teams, freelance workforce*, musicians & other artists. Added benefit: Career development opportunities for early stage artists, freelancers and event entrepreneurs. <i>*includes production staff, technical staff, front of house managers, designers, marketing and PR staff, photographers, filmmakers, writers</i>
Spending	This includes direct spending associated with the music festival (e.g. box office spend) but also indirect spend on transport, hospitality and retail associated with the festival. UK Music reported a minimum spend of £8.2m at festival box offices and minimum 87,000 attendees in 2017.
Supporting local businesses	E.g. music venues & landowners; hospitality, retail, transport (taxis, van & lorry hire, public transport), security firms, infrastructure suppliers (such as fencing, staging, electricity generators, marquee hire, flooring), printers, media sites & spaces, magazines & papers advertising.
Third sector	The not-for-profit sector is a key beneficiary of music festivals.
Place Making	
Footfall	Music festivals attract tourists, increase footfall in city and town centres and add to the vibrancy of places, making them more attractive
Reputation	Cultural vibrancy, enhanced by a busy festival schedule, can improve the reputation of places and attract people, businesses and students to visit and/or relocate
Regeneration	Music festivals in South Yorkshire have in the past brought disused/abandoned buildings and spaces back to life.
Cultural Contributions	
Education & school	Music festivals often include educational outreach work and

activity.	engage with school children and youth groups etc.
Artist development	Music festivals often have platforms for new talent and can be a place of experiment or discovery for musicians, with subsequent career opportunities (e.g. commissions, residencies, releases & touring)
Cultural awareness & exposure to new experiences	Music festivals are meeting places for a diverse range of musicians and audiences and can introduce the audience to new music genres, raise cultural awareness and extend horizons.
Spotlight on local cultural assets	Music festivals can bring unused spaces back to life, shine a light on local stories and heritage, give local musicians a platform and provide space for other art forms (a lot of music festivals also offer other, ancillary art experiences)
Innovation & collaboration	Music festivals enable making new connections, allow for innovative use of technology, foster collaborative work between artists or genres – either through formal professional platforms as part of the festival or through more informal channels.
Social Impact.	
Tackling social isolation	Music festivals are meeting places. A lot of South Yorkshire's festivals have low cost or free elements and/or include activity in public places, so accessibility is high.
Social cohesion	Musicians and audiences come together and see their friends and peers perform in a positive atmosphere
Civic pride	Music festivals are a positive, joyful event and inspire civic pride
Safe, regulated events	South Yorkshire festivals largely report a low crime rate on festival days.
Volunteering	A lot of South Yorkshire's music festivals rely on volunteers. Volunteering is a way for people to connect, support their community, develop skills and progress their career ambitions

The wide range of risks already faced within the music festival sector combined with the Covid-19 pandemic (and its economic and societal impacts) means that the vast majority of music festivals had to be cancelled in 2020. This impact will be felt at least into 2021. It is expected that the growth of the sector will not just be halted but that there will be a reduced number of music festivals/events in 2021 overall.

However, with targeted financial support the music festival sector could potentially not only survive but play a full part in sustaining local economies and helping to revitalise social and

cultural vibrancy within our communities.

Key support required includes:

- financial support;
- clear public health guidance and advice from government and local authorities;
- strategic, cross sector discussions and agreements (e.g. with insurance sector).

2. The Impact of cancellations on local economies and those who derive income from festivals during 2020.

- Sizeable reduction in turnover for music festivals (evidence gathered suggests a reduction between 50% - 75%). Many festivals are facing a year-end deficit.
- Job losses / jobs not re-advertised (despite efforts to retain as many posts as possible).
- Members of a skilled work force have moved to other sectors; this is particularly apparent in the freelance workforce.
- Suppliers (e.g. equipment & infrastructure hire etc.) and catering operations are under threat due to lost work and income.
- There has been a huge impact on local hospitality, breweries, retail and tourism due to cancelled events and reduced visitor numbers.
- There is a lot of uncertainty for many festivals, especially grassroots/community festivals, for 2021.
- Music festivals are high-risk enterprises at the best of times and already 'cut to the wire'.
- Festivals have felt the 'squeeze': honouring contracts/payments and refunding customers at the same time.

3. What are the risks to festivals taking place in 2021 and beyond (see Full Response for mitigation).

- Public health risk
- Financial risk including forecasting consumer demand
- Losing a highly skilled workforce
- Losing grassroots/independent/DIY festivals
- Losing venues
- Increased costs – e.g. agents charging higher fees (and/or 100% upfront fees) to recoup their own losses
- Insurance – a key stipulation with local authorities/partners in order to stage events
- Losing sponsors/private partnerships
- Brexit could mean a potential loss of an income stream if EU funding is not replaced by a domestic equivalent
- Brexit could affect international touring artists which may affect festival bookings

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

All music festivals that provided evidence to this submission expressed a need for more information and clarity.

- Guidelines and information, a clear pathway and a likely timeline regarding social distancing measures.
- Smaller festivals don't have the capacity to manage public health regulations alone. Local authority support on public safety measures would be welcome.

- The recently approved Covid-19 vaccine is clearly a breakthrough and offers hope but there are many unknowns including the risk of carrying and spreading the disease even when immunised.
- Rapid Testing to reassure attendees that everyone attending is negative could be a solution to festivals without the need for social distancing.
- The larger festival associations have stated that they envisage festivals not having to manage social distancing protocols.
- Festival teams are creative thinkers and there will be innovative and interesting solutions. However there will invariably be cost attached and the working capital of many festivals is now very lean.
- Collaborative working and information sharing across the industry is vital.

5. a) What has been the impact of the temporary VAT cut.

- The impact of temporary VAT cuts has been negligible so far for various reasons (e.g. festival cancelled, tickets already sold, VAT not applicable) but will be of benefit for future festival sales if the scheme is extended.

5. b) What has been the impact of the Culture Recovery Fund on festivals and their supply chains.

- 2 out of 26 festivals have received Cultural Recovery Funding (CRF) in the City Region (7.7%).
This support was a lifeline, retaining jobs and providing some stability. CRF was very much appreciated as a response from government and the Arts Council. It is however a short-term fix, rather than a long-term solution of the challenges festivals are facing.
- It seems that few festivals applied to the CRF, either because they were discouraged from applying or because the threshold of £50,000 was too high – but there is still a need for financial support. One festival commented that they had ‘stood aside’ and not applied to allow more resources for those who most needed it.

6. What else can the Government do to secure the future of music festivals?

Finance & funding
Provide dedicated funds for music festivals. These events tend to be subsumed under broader headers and compete with a wide range of arts organisations (many of whom have dedicated fundraising departments).
A new round of Cultural Recovery Funding would be very welcome - but the minimum threshold of £50,000 should be reduced; possibly to £25,000.
Extend the VAT relief: Whilst the effect so far has been minimal, it is more likely to be of benefit in 2021 – 2022.
Incentives for private sector support e.g. match funding for sponsorships.
Replacement for imminent loss of EU funding streams.
Pathway back to business
Support and guidance regarding public health regulations (including social distancing

measures, test & tracing, vaccines, sanitising infrastructure, enforcement).
Work strategically with the insurance sector.
Local authority talks
Work with local authorities on issues of business rates and general support. Many festivals have very lean operating bases and fall under the radar of local authority help (e.g. grant criteria based on ratable value).
Other music festivals on a larger scale in the wider sector are inappropriately charged business rates.
Sustaining a skilled sector
There is widespread concern that grassroots, DIY & local festivals are under threat. These festivals have huge value to local communities and the music sector, including developing emerging talent and skills base.
There is a great strength of feeling that the freelance workforce should be supported better as many are falling through the gaps of existing support schemes.

7. How has the structure of the UK festival market evolved over recent years and what further changes might be anticipated (see Full Response regarding changes in the structure of the market)?

Economic
Potential reduction in sponsorship/private support for festivals as economy shrinks.
Regeneration: Festivals could play a crucial role in helping to revitalise city and town centres following the recent shift in retail to online sales and the trend towards shopping at neighborhood retail parks.
Growth of multi-national companies within the music festival sector. Some are also integrated with ticketing companies & music management companies. Potential issues as a result: ‘stranglehold’ on talent; inflated costs for artist fees; ‘homogenising’ the offer for audiences; stifling opportunities for artists.
Social
Demand for festivals and live music is anticipated but public confidence needs to grow.
With support, festivals could further develop their social impact – providing safe events or presentations for older and cross-generational audiences and tackling social isolation.
Technological
Online festival activity is also here to stay – however most events are predicting a move to

a hybrid approach; a combination of physical, real life events and online streaming or supplementary events. We also anticipate more innovative approaches and higher quality online experiences.

Political

Environmental Impact – many festivals are looking to reduce their carbon footprint and become carbon neutral/negative, reduce plastic use and promote awareness.

8. a) How can festivals be supported to reduce their environmental impact.

Sustainability within festivals and hospitality is high on the sector’s agenda. Support to develop further solutions would be very welcome.

8. b) How can festivals be supported to tackle the dangers of illegal drug use?

To date the South Yorkshire festivals that have provided evidence for this inquiry have reported low crime rates generally.

Full Response

1. The economic and cultural contribution of the festival industry

a) The economic contribution of music festivals

From our research it is clear that festivals provide employment for their core teams and for musicians and suppliers (equipment, designers, printers, promotional companies). They also have a large impact on local businesses, particularly on hospitality (onsite caterers, bars, pubs, restaurants, cafes plus retail) and tourism (hotels), taxis and public transport. There are a diverse range of business models and festival types across South Yorkshire, however they can all demonstrate the above benefit to local businesses and communities.

“SynthFest UK brings big brand manufacturers such as Yamaha, Roland and Korg to the city. The stand holders alone occupy many hotel nights and the one-day event attracts visitors from all over the world.” Sensoria Festival (SynthFest UK hosts)

“Barnsley Live is the largest attended event in the town, after the football club match days... we are able to find out how each establishment does financially on the day, and for most it is easily their most profitable of the year.” Barnsley Live

South Yorkshire music festivals provide an early career opportunity for musicians and bands to gain experience and fan bases (in addition to performance fees).

“Musically, we employ almost exclusively South Yorkshire musicians who are generally young and hopefully on an upward trajectory... everyone who plays at our festival receives payment. Without the festival all these bands would struggle to get a platform of this size to perform, and hopefully increasing their fanbase.” Consibrough Festival

Additionally, some festivals (e.g. Algomech Festival) provide commissions and residencies. This provides the opportunity for artists to be paid whilst they create new work – they can keep rights to the work, which means potential future income through touring or royalties. Sensoria Festival commissions soundtracks to films which then tour to cinemas, venues and festivals around the world. Plus soundtrack/album releases create further income for the musician. Additionally, many festivals provide early career development opportunities for future freelance event organisers and entrepreneurs. Sensoria Festival in 2019 employed 4 paid interns and also has a ‘young booker’ scheme. (In addition to 1 job loss, these paid opportunities were all lost in 2020.)

There was also a consensus that the not-for-profit sector benefits significantly from festivals taking place. Many festivals have dedicated charities (e.g. Tramlines raised £20,000 in 2019) and some are completely not-for-profit with all proceeds going to designated charities (e.g. Conisbrough Music Festival).

Additional Economic Benefits

- Contribution to PRS and live music royalties (over and above performance fees).
- Wider arts and crafts sector supported – some festivals had ancillary arts/craft/maker markets.
- Regeneration of abandoned spaces – often subsequently open up as venues/ are gentrified.
- Town/City centre footfall and spend increases over the festival period.

- Reputation – Positive coverage of festivals in the press and via word of mouth. Music festivals can enhance the reputation of a place.

1. b) Cultural contribution of music festivals

Across South Yorkshire the cultural impact of festivals is far reaching from education to innovation. Education programmes range from performances in schools to higher education talks, internships and mentoring.

“Culturally, we build up to each year’s festival with engagement with local schools offering one of our performers to play at school assemblies. We also engage local artists to provide stage artwork and general site art installations.” Conisbrough Music Festival

“During the 2020 Sheffield Chamber Music Festival, we would have engaged with more than 4,600 people at over 20 high-quality events and provided a performance platform for local music-makers and young musicians. Each year, our Learning & Participation programme reaches more than 14,000 people through around 100 events, of which over 10,000 are aged 0-19.” Sheffield Chamber Music Festival (Music in the Round)

Some festivals also embrace academic research, innovative presentations and encourage new ideas through chance encounters.

“For me, a festival is a way to bring different practices and disciplines together, creating the opportunity for cross-pollination and chance encounters. In these circumstances new ideas and collaborations are formed, that may well be economically and/or culturally transformative. My own festival showcases new directions in performing arts, music technology, crafts and academic research, and includes residencies, a symposium, art exhibition, concerts and a club night - bringing together practitioners across a diverse programme who wouldn’t normally meet. Many festivals are the same, and I think it’s this breaking down of barriers that leads to real impact.” Algomech Festival

1. c) Social contribution of music festivals

It was consistently noted that music festivals demonstrate many wider social benefits such as a positive impact on well-being, creating an opportunity to socialise and inspiring a renewed sense of local pride.

Music festivals are also meeting points for friends, neighbours and family, generating a sense of community and social cohesion.

“Barnsley has a relatively small, but close-knit music scene, and Barnsley Live is the one day of the year when everyone - musicians and punters alike - can all come together and see their friends and peers perform in a party atmosphere. (Just to note, we have never seen any trouble occur at a BL event).” Barnsley Live

Sensoria Festival has partnered with local community networks (e.g. Age Better and Ignite Imaginations) to help tackle social isolation.

“This made a real difference to people that sometimes don’t feel able to leave the house and who sometimes spend considerable amounts of time without speaking to other people. The outdoor environment was mentioned repeatedly as an escape and something different.”

People made new connections with other people, told me it was 'refreshing' and 'uplifting', 'it cheered me up no end.' Ignite Imaginations feedback (pre-Covid)

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

"We have concerns that some of our suppliers will not be in business by 2021." South Yorkshire festival

The impact on festivals themselves has been a significant reduction in turnover, driving some festivals into a deficit position for their financial year. The reduction, on average, has been between around 50% - 75%. Many festivals have honoured payment commitments to artists whilst at the same time standing some refunds to customers which means there is a huge financial 'squeeze' on the festivals themselves. Several festivals also reported a huge blow to the local retail and hospitality trade.

In terms of their own supply chain, many festivals have borne the brunt of the impact, some have paid artists 75 – 100% of fees committed. Some have worked to ensure the ecosystem of suppliers have at least some paid work, including freelance designers and technicians. Reports have included honouring artist payments even when events had to be cancelled at short notice:

"We paid all the freelance musicians involved in events in March in full, at a cost of £15,000, as it was such short notice. We also paid our resident Ensemble 360 musicians 75% of their fees for the cancelled 2020 Sheffield Chamber Music Festival (SCMF) in May at a cost of over £14,000, to support them at a time when their diaries were emptying of work and the self-employed support scheme was failing them." Sheffield Chamber Music Festival (Music in the Round)

The business model of music festivals is already extremely precarious with companies/organisations heavily reliant on income from just one weekend/week's worth of income.

Staff employment levels

Many festivals reported paring back on their staffing levels. Sheffield Chamber Music Festival reported furloughing some staff and not replacing others when they left. Sensoria Festival also chose not to re-advertise when a permanent part-time post became vacant (this was subsequently re-introduced with CRF support).

"In early April, once the team had finished cancelling activity, we began furloughing staff, with their agreement. The team of nine (6.6 FTE) was reduced to four (2.5 FTE) in May, and to two (1.3 FTE) in June. Furloughed staff returned for one day a week in July and gradually increased hours in September as our activity increased again. One part-time member of staff left in September; one started maternity leave on 1 November; and a freelance contract ended in May, thus staff costs were reduced by 25%, which meant we did not need to make any staff redundant. Staff will be furloughed over Christmas and New Year to save further costs." Sheffield Chamber Music Festival (Music in the Round)

Local trade, hospitality, retail and caterers

“The cancellation of Barnsley Live was a huge blow to the local pubs and eateries. It is essentially an extra bank holiday weekend in one day. And as mentioned previously, we are a multi-venue festival, which means we need to hire sound technicians and PA systems for each one (25 in 2019). We hire every local sound tech in Barnsley, plus others from Sheffield, Rotherham and Doncaster.” Barnsley Live

Hotel rooms were cancelled and many local businesses affected – those cited include taxi companies (also often self-employed), security firms, infrastructure suppliers (such as fencing, staging, electricity generators, marquee hire, flooring), printers, media sites and spaces (billboards and legal fly posting), local magazines and newspaper advertising.

Cultural impact of cancellations

The level of impact of educational and cultural work has also suffered, as demonstrated by Sheffield Chamber Music Festival: *“We are aiming to present family concerts in spring 2021, but will reach about a tenth of the young people we usually would. Each year we engage 25-30,000 people with live music; in 2020/21 it will be nearer 2,500.”* Sheffield Chamber Music Festival (Music in the Round)

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

3. a) Losing a skilled workforce.

In addition to the impact on musicians and artists, the loss of skilled technicians, equipment suppliers and production staff would cause huge problems for the return of festivals. These are the key staff who ensure that safety measures are upheld and ensure a high-quality experience on the day. The safety of staff and public alike could suffer from the lack of staffing with this expertise and experience. Some South Yorkshire music festivals already experience a staff shortage, at peak times, of skilled technicians such as sound engineers – the loss of such freelance workers would affect festival’s ability to grow whilst maintaining quality of their presentation.

“The danger is that we lose really skilled people, who are forced to take whatever work they can over the coming months – musicians and performers are already taking non-creative work just to pay their mortgages. If our technicians and engineers are forced to do the same, it compounds the issue around keeping venues open/reopening others that have been closed for months due to Covid-19.” South Yorkshire festival

“There are 3 million people who have fallen through the cracks of the various schemes. That’s more than 10% of the working population, and indicates that less than half of the 5 million freelancers in the UK have received support. As it stands, there will be a very small pool of artists left for Festivals to programme, so therefore fewer/shorter/less unique festivals.” South Yorkshire festival

Mitigation: The gaps of existing financial support schemes for self-employed workforce need to be filled. In addition there could be sector specific schemes to retain these hugely valued skills and services and/or offer retraining opportunities for people who are looking to enter the sector.

3. b) Losing grassroots music festivals and venues

The smaller sized grassroots music festivals often play a vital role in working with local communities, helping keep freelancers and artists employed, offering early stage career and skills development opportunities, and keeping independent venues alive. Their existence isn't always celebrated as much as the higher profile, larger festivals but they make a difference to people's lives and their loss would be felt very deeply. Equally the loss of venues would be felt by the music festivals sector. Many South Yorkshire music festivals make use of multiple indoor music venues and again often provide a platform for emerging talent.

"I think there's a tendency to see opera houses, large arts venues as providing culture to the masses, but really I think things go in the other direction - experimental culture is generated in small venues that slowly bubbles up to the larger ones. I'm not sure if anything culturally really new and exciting ever happened at an event where everyone had to fill out an impact survey on the way out." Algomech Festival

3. c) Public health risk

This has been referenced elsewhere in the submission but in brief, many festivals were cancelled in 2020 due to concerns over public safety. Some festivals have carried over their bookings from 2020, which sets the budget. Extra costs for public health measures may make the festival prohibitive or at least impact on the scale of the offer.

"Barnsley Live isn't a "stage in a field" type festival, the space we have is down to each individual venue. Anything less than 100% capacity availability would be almost impossible for us to handle as the idea of BL is that people can move freely between venues depending on who they want to see, and there are often queues to get into places as it is." Barnsley Live

Mitigation: As more measures such as the vaccination roll out are implemented and rapid testing becomes available this may see more festivals re-emerge. However, many smaller-scale festivals have reservations about their viability in 2021 depending on the need for social distancing and other public health measures.

Assistance from local authorities, clear government advice and possibly mentoring/sector-wide collaboration would all potentially help.

3. d) Financial Risk, public demand and insurance cover.

There was a sense across South Yorkshire that audiences were missing the music festival experience. However, some organisations did report feeling unsure of demand due to potential cancellations or public health guidelines/risk.

"There will be a nervousness from audiences to attend and book tickets, which we have mitigated by signing up to the various kitemarks available for the sector and businesses. We also offer automatic refunds for anyone unable to attend due to self-isolating or the concert being cancelled, so they know there is no risk to their purchase." Sheffield Chamber Music Festival (Music in the Round)

It is likely that external factors will affect public confidence including timescales for ongoing restrictions, the success of the vaccination roll out, clarity of future guidance etc.

Mitigation: Well publicised and timely guidelines and clear plans on public health measures.

Financial risk mitigation

Some potential government measures are mentioned in section (6) but in brief:

- A new round of CRF would be welcome to help with financial risk.
- Dedicated funds for music festivals (possibly specific funding for grassroots, local and independent festivals with an easy and open application process).
- Possibly provide some support for grassroots/community organisations to make their business models more self-sustainable – e.g. developing additional income streams, improve digital and fundraising skills (e.g. around crowdfunding) or adopt innovative ideas through peer to peer (see Sheffield Soup <https://sheffieldsoup.wordpress.com/> for an example of live crowdfunding easily adapted to live music projects).
- Extend the VAT relief – it is more likely to be of benefit in 2021 – 2022.
- Work with local authorities on issues of business rates and general support.
- Festivals would also benefit from sector-wide work with insurance companies on public indemnity and cancellation policies.

3. e) Losing sponsors/private partnerships

Loss of income from private sources is a danger as the economy shrinks.

Mitigation: Offer incentives for private sector support – e.g. match funding for sponsorships.

3. f) Increased costs e.g. agents charging higher fees (& 100% upfront fees) to recoup their own losses

Festivals tend to endure high, often excessive, artist fees particularly for headline acts. This was already a problem pre-covid, with agents now starting to request 100% upfront.

Mitigation: A strategic agreement across the supply chain may be needed to ensure that the whole sector survives – there is a danger that only the largest (possibly transnational) festivals would be able to absorb high fees and have the negotiating power on deals.

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

All festivals that responded expressed a need for more information and clarity on ongoing public health measures.

Guidelines and information and a clear pathway to implement public health measures were requested by festival organisers, plus support and advice from local authorities on the ground.

Smaller festivals noted that they may not have the capacity to manage this process alone. Some felt they may not be able to host a festival in 2021.

“I think once we get back to normal, demand for festivals will still be there, it may even increase. Under any restrictions at all, it would be uneconomical for most to take place in any format.” South Yorkshire festival

“I don’t see any way of holding a music festival without social distancing until such as the virus is almost eliminated. Use of face coverings will not be adhered to, temperature checks will

return too many false negative tests. Social distancing will only be possible with strict seating control – Holding festivals outdoors will keep the risk of transmission as low as can be at whatever level of transmission. Performers and staff can be tested and security staff wear PPE ensuring some protection but the uncontrolled masses will always present a level of risk.”
South Yorkshire festival

5. a) What has been the impact of the temporary VAT cut?

For the majority of South Yorkshire Festivals, the impact so far has been negligible. For some community and not-for-profits there was no direct benefit, for others the VAT had already been paid on most of their ticket income (they had cancelled and carried some ticket sales over) and for others their festivals were cancelled before any ticket sales were made. No festival that responded unreservedly stated that the VAT cut had been of great help. However, an extension to 2021/22 is likely to be of more benefit.

“None as the VAT cuts does not help where there are zero sales to benefit” South Yorkshire festival

“VAT n/a for many organisations” South Yorkshire festival

“We are a small community festival who are not registered for Vat or eligible for support packages. We can simply sit this out and wait for the all clear. Whenever that may be we’ll be ready to go again, but how many of our suppliers are still there is the question.” South Yorkshire festival

5. b) What has been the impact of the Culture Recovery Fund on festivals and their supply chains.

- 2 out of 26 festivals have received Cultural Recovery Funds in the City Region (7.7%), totaling approximately £168,000. This support was a lifeline and a very welcome response from central government. One South Yorkshire festival stated that they had been conscious of ensuring employment for freelance workers and support had enabled paid contracts for design, writers, web developers and AV technicians. By March 2021 there will also be freelance contracts in marketing and fundraising/development roles. It is however a short-term stop gap with a further potential ‘cliff edge’ in 2021.
- It seems that few festivals applied to the CRF, either discouraged from applying or the threshold of £50,000 was perhaps too high. One festival commented that they had ‘stood aside’ and not applied to allow more resources for those who most needed it.

6. What else can the Government do to secure their futures?

- Provide dedicated funds for music festivals. These events tend to be subsumed under broader headers and compete with a wide range of arts organisations (many of whom have dedicated fundraising departments).
- A new round of Cultural Recovery Funding would be very welcome - but the minimum threshold of £50,000 should be reduced; possibly to £25,000.
- Extend the VAT relief: Whilst the effect so far has been minimal, it is more likely to be of benefit in 2021 – 2022.
- There is a great strength of feeling that the freelance workforce should be supported better as many are falling through the gaps of existing support schemes.

- There is widespread concern that grassroots, DIY & local festivals are under threat. These festivals have huge value to local communities and the music sector, including developing emerging talent and skills base.
- Support and guidance regarding public health regulations (including social distancing measures, test & tracing, vaccines, sanitising infrastructure, enforcement).
- Work strategically with insurance sector.
- Work with local authorities on issues of business rates and general support. Many festivals have very lean operating bases and fall under the radar of local authority help (e.g. grant criteria based on rateable value). Others on a larger scale in the wider sector are inappropriately charged business rates.
- Incentives for private sector support e.g. match funding for sponsorships. (Historically Arts and Business had a matching scheme that worked well).
- Replacement for imminent loss of EU funding streams.
- Work strategically with the insurance sector.

7. 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?

- As mentioned in the introduction there has been a proliferation of music festivals, the industry has seen genuine growth in the number of events presented. South Yorkshire alone has seen a growth of over 50% between 2015 and 2019. Music festivals provide a vital income stream for musicians at all levels of their career, this includes performance fees (often at a premium rate), royalties and income from merchandise (in addition to developing fan bases and PR exposure).
- In addition to providing a platform for new musical talent, there is a strong correlation between grassroots/DIY festivals and early career development opportunities for future freelancers and entrepreneurs.
- For consumers there is a much greater choice, special interest and niche festivals cater to many music genres (e.g. Folk Forest).
- One 'ripple effect' has been a growth in sectors such as on-site catering (street food) and an impact on helping to sustain city and town centres.
- As the sector has grown and become more competitive, festival companies increasingly seek unique collaborations and commissions to enhance their own festival offer. This has led to diverse and much needed opportunities for additional makers and artists. Street Art and large-scale installations are now frequently incorporated into festivals, meaning the wider arts and culture sector now directly benefit from 'festival season', including jobs.
- An evolving issue has been the growth of multi-national companies within the sector. Some of these businesses are also integrated with ticketing companies and music management companies.
This presents a danger to the sector with a 'stranglehold' on talent, inflated costs for artist fees and 'homogenising' the offer for events and audiences alike and additionally stifling opportunities for artists.
With grassroots festivals already precarious and impacted by the pandemic this issue needs to be addressed.

What further changes might be anticipated.

- Regeneration: Festivals could play a crucial role in helping to revitalise city and town centres following the recent shift in retail to online sales.

- Online festival activity is also here to stay – however most events are predicting a move to a more hybrid approach – a combination of physical, real life events and online streaming or supplementary events. We also anticipate more innovative approaches and higher quality online experiences. 2020 saw an unprecedented shift to online presentations, live streams, curated playlists, social events etc.
- Some festivals may choose to merge with other existing festivals to create hybrids e.g. literature and chamber music or Synthfest and Algomech Festival etc. Festivals may choose to share the same sites and thus save money on infrastructure. It could create exciting hybrids or it could reduce the offer and opportunities for many people.

“In 2021 we aim to build on the success of SCMF@home and produce online content that complements our live music-making. Although we plan to present some of our concerts online so everyone and anyone can see our musicians perform, we want to make the most of the possibilities of music technology. Music in the Round’s aim is to ‘get people closer to the music’, and the more popular videos in SCMF@home were of musicians providing insights and up-close shots of themselves playing, as well as informally chatting about music and music-making. It is this content that we want to create: not just for now, but to permanently enhance and improve our programme and reach new audiences and sources of income. With our musicians willing to share their music-making in creative ways, we see this digital content as a vital part of our sustainability as we evolve new ways of getting people ‘closer to the music’. We can record string quartets ‘in the round’ with 360° cameras enabling people to feel surrounded by the musicians; drones can get unusual angles above and below; composers can present their music from wherever they are in the world.” Sheffield Chamber Music Festival (Music in the Round)

8. a) How can festivals be supported to reduce their environmental impact.

Sustainability within festivals and hospitality is high on the sector’s agenda. Support to develop further solutions would be very welcome.

- Plastic has traditionally been an issue and waste reduction is particularly developing; reusable glasses are now used more widely.
- Promoting use of public transport (pre-Covid) has been on the agenda of many South Yorkshire festivals. Tramlines festival shows partnerships in place with Supertram.
- Festivals generally are working to become carbon neutral / reduce carbon emissions. The move to online activity has helped with cutting international travel and this is likely to continue.
- Online promotional activity has also resulted in reducing waste and fewer printed materials.

8. b) Tackling the dangers of illegal drug use?

Festivals generally have meetings with the local Safety Advisory Group and local authorities. To date the South Yorkshire festivals that have provided evidence for this inquiry have reported low crime rates generally.

There are a high proportion of community focussed, often cross generation festivals in the South Yorkshire area. The larger music festivals have clearly stated zero-tolerance Drugs Policies including a Prevent, Pursue, Protect policy. Bag and body searches are a condition of entry to many festivals. On-site welfare teams are also available.

The SCR Music Board would be happy to engage in further discussions to assist in ensuring the future of music festivals.

Annex 1. List of South Yorkshire Music Festivals

Algomech Festival
Askern Music Festival
Barnsley Live
Beanfeast
Bradfield Festival of Music
Conisbrough Music Festival
Doncaster Folk Festival
FarmFest
Folk Forest
Get Together
HubFest
Tickhill Tfest Music Festival
Mexborough Music Festival
MosFest
No Bounds
Peace in the Park
Sheffield Chamber Music Festival
Sensoria Festival
Women of the Seven Hills Music Festival
SynthFest UK
Thorne Waterside Music Festival
Tickhill Music Festival
Underneath The Stars
Valley Music Festival
Wath Festival
Wentworth Music Festival