

Doing Knowledge Transfer? Researching the UK festival industry in 2010

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For the past two and a half years, I have been working on a PhD investigating contemporary live music promoters in the UK, as part of an AHRC-funded project into the history of live music in the UK with Simon Frith, Martin Cloonan, and Matt Brennan. In August of this year, I received a forwarded email via Simon from Festival Awards, a company which organises the annual UK festival industry awards ceremony in London. Festival Awards was looking for someone to produce a market report on and for the festival industry that combined data from an annual census of festival-goers with other available information.

To briefly contextualise the assignment, the UK Festival Awards began in 2004 and was established by the festival listings website, Virtual Festivals. Festivals nominate themselves for a variety of awards, including best major festival and best family festival, and over 150 festivals were entered into the 2010 awards. Winners are voted for by the public, incentivised by free festival tickets; over half a million voted in 2010, and 2,700 responded to the annual census mentioned above. Matt Brennan and I agreed to take on the work and spent approximately one week in October of this year crunching data and searching secondary sources for useful research that we could use in the report. Today's paper is therefore both to share with you what we found out about the UK festival industry in 2010, and to discuss the processes involved with 'doing knowledge transfer', with the aim of getting a discussion going around the perils and pitfalls of doing so.

Knowledge transfer

To begin, a brief introduction to knowledge transfer.

The Arts and Humanities Research Council (AHRC) claims that it has an 'elevated status within government policy frameworks', and defines it broadly as follows: 'To strengthen the **impact** of arts and humanities research by encouraging researchers to **disseminate** and **transfer** their **knowledge** to other areas where it can make a difference' (AHRC, 2009). The AHRC further defines KT, impact and dissemination in the following ways:

KT refers to the processes by which new knowledge is co-produced through interactions between academic and non-academic individuals and communities . . . [which deliver] significant added value for both the academic and non-academic partners.

Impact refers to the demonstrable contribution that excellent research makes to society and the economy . . . [and includes] fostering global economic performance, and specifically the economic competitiveness of the UK.

Dissemination refers to the processes by which knowledge that is generated through academic research is made available to audiences beyond the immediate peer community.

The Festival Awards report therefore appears to tick all of the AHRC's boxes: it is a partnership between academics and the festival industry; it will (hopefully) impact on the economic competitiveness of the UK festival industry by analysing the responses of thousands of festival-goers, their motivations and their needs and wants; and finally, it will be disseminated at the 2010 Festival Awards ceremony, thereby reaching a good proportion of the UK festival industry. So far, so good. The knowledge transfer will not all be one way, however, as the project team will also benefit from the research by having access to useful data about the UK festival industry and free tickets to both the UK Festival Conference and the UK Festival Awards ceremony on November 18th at the O₂ in London.

However, an article (currently in press) by John Williamson, Martin Cloonan and Simon Frith, entitled, 'Having an impact? Academics, the music industries and the problem of knowledge' questions the entire concept of knowledge transfer, drawing on work by Philip Schlesinger to show that knowledge transfer can, instead, meet with 'knowledge resistance'. Williamson et al draw three conclusions based on three case studies. First, that 'knowledge' is not a neutral category; knowledge becomes valuable based on whether its effects are morally and politically desirable. Second, knowledge as defined by academics and knowledge desired by the music industries and policy makers is not necessarily one and the same. Third, knowledge transfer may meet knowledge resistance when that knowledge is not what said music industries and policy makers want to hear.

The first point to be made is that, unlike some academic work, Matt and I were specifically commissioned to undertake this research, and, as Williamson et al point out, effectively we were producing the kind of knowledge that industry users want and we therefore perhaps became client-driven market researchers rather than academics. While this appears to fulfil the AHRC strategy, were we selling out our academic principles for commercial ends? Were we, in fact, as Williamson

et al warn, on the way to producing ‘useless knowledge’? The second point is that this was the first piece of work of this kind that either Matt or I had undertaken and therefore we were understandably perhaps somewhat naive as to what to expect. This paper will therefore illustrate some of the problems that Matt and I came across as follows. The first section will address some of the issues in the compilation of the report, namely in defining the value and size of an industry; commercial agendas; and the lack of published methodologies. The second section will address some of the practical issues that occurred, namely around issues of authorship; the design process; and proof-reading and sign-off. The final section will address the aftermath of the report, in particular, media interest and other feedback.

Compiling the report

The value of the UK festival industry

The brief for the Festival Awards assignment included a section on ‘what’s the market like now?’, to include information on festival capacities and market share; the final report would consist of a literature review of the market as is followed by an analysis of festival-goers’ census data. While the brief did not specifically ask for a valuation of the UK festival industry in 2010, the 2009 report included one, and Matt and I therefore attempted to find a figure to include. The 2009 Festival Awards report states that ‘Given previous research into economic multipliers of festival spending’, the music festival industry was worth £945m to the UK economy in 2009, based on spend by festival goers on and off site combined with estimates of overall organisation costs to calculate total spending (Watson et al, 2009). However, there are no sources given for such estimates and, as economic valuation does not form part of our own research, Matt and I felt uneasy about producing our own figure without access to commercially sensitive data and a longer time-frame within which to carry out such research. We therefore looked to external sources for an estimate of the value of the UK festival industry.

Market research company Mintel puts the *live* music industry at £2.3 billion in 2009, but does not source or explain where this figure comes from (Mintel, 2010). The ‘Britain for Events Report’, published by the Business Visits and Events Partnership in October 2010, puts the value of festivals and cultural events at £1.1 billion, but it categorises music concerts separately from festivals, and it is unclear as to whether ‘cultural events’ includes smaller events such as village fetes and parades (Britain for Events, 2010). The most commonly cited sources for economic data on festivals in 2010, however, have been PRS for Music and the Association for Independent Festivals. According to a recent PRS for Music report, music fans spent £1.45bn on live music in 2009, up

9.4% on the previous year. The festival market accounted for 19% of this revenue, and also saw the sharpest rise coming from the festival market where spending rose £50m to £275.5m (Page and Carey, 2010). It should be pointed out that the PRS for Music's data is allegedly not trusted by some in the industry, however, as the figure of £1.45bn was partly attained from data on secondary ticketing acquired from Tixdaq, a comparison site with a pro-secondary ticketing agenda. Also, PRS for Music is currently reviewing the Tariff LP (for popular music events) and Tariff DP (for dance parties), and is undergoing a consultation period which ends on December 31st 2010. The key issue for festival promoters is the potential increase to the current basic 3% performance rate, although the PRS insists that a decision as to whether the rate should be raised will only be reached after the consultation period. PRS for Music as an organisation is therefore of concern to promoters and festival organisers and the industry's supposed mistrust of their data was perhaps not simply methodologically based.

The final Festival Awards report included the PRS figures, however, with reference to the disclaimer that will be discussed shortly, and stated that 'Some estimates put the true value of the outdoor festival market at over £1bn, but the lack of consensus [as discussed below] in defining the market makes it difficult to assign a conclusive monetary value to the festival sector'. It should be pointed out that the £1bn figure came from anonymous 'festival experts' quoted in an article in the trade publication, *Music Week* ('Festival survey reveals a cause for celebration', 2010).

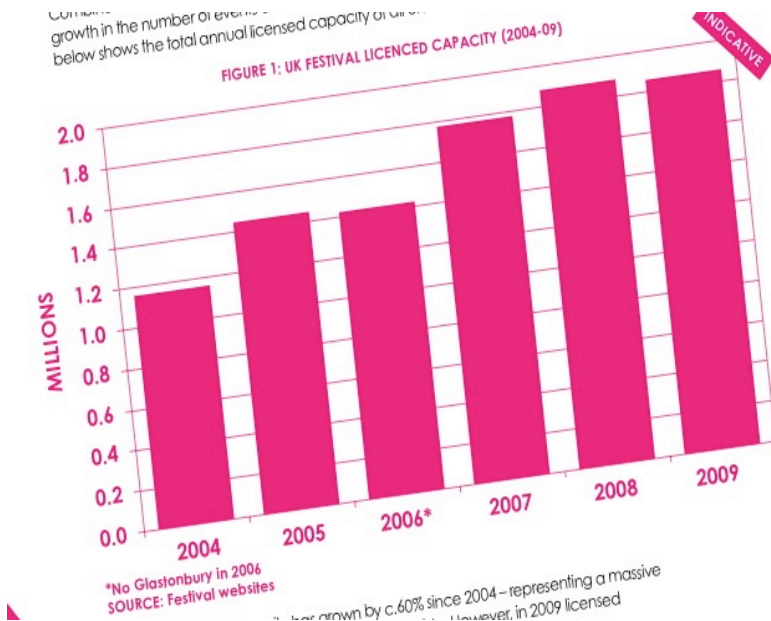
A further point should be made here, which is the desirability of such 'monetary values' to the music industries. Having such figures is useful for the following reasons. First, it allows the industry (or Festival Awards, at least) to show policy makers just how seemingly valuable their industry is to the UK economy – hence the recent growth in economic impact reports by festivals such as Glastonbury and Celtic Connections. Second, it is useful to show to sponsors to encourage new sponsorship. Third, headline making figures create news stories and press coverage for both the festival industry and for the body producing those figures. However, as mentioned above, such monetary values are very problematic to ascertain without access to data; Matt and I's own attempt to produce a figure appeared to have devalued the festival industry by £300 million from 2009!

The size of the UK festival industry

As stated, the brief for the report specified that it should include information on festival capacities as an indication of the size of the UK festival market. However, just as it is problematic obtaining accurate economic data on the festival sector, it is equally challenging to state the number of festivals in the UK and their capacities. The Festival Awards Report 2009, for example, contained

an indicative graph showing the increase in festivals' licensed capacity from 2004 to 2009, the source given being a rather dubious 'festival websites', as shown here:-

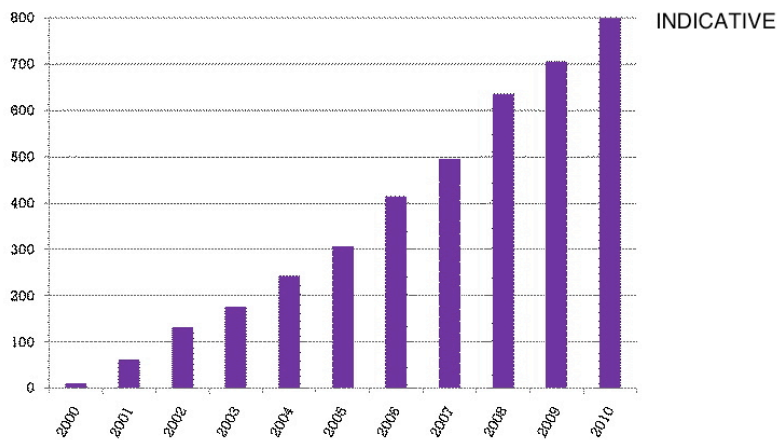
Figure 1: Festival licensed capacity (2004-2009) from FA Report 2009



However, Matt and I struggled to find reliable data on festival capacities with which to produce a similar graph and so we had to try a different method to give an approximation of the size of the UK festival market. We noticed that Virtual Festivals' commercial rival, eFestivals, has a search function whereby one could specify the start and end date and location, hit search, and the website would retrieve the number of festivals listed for that year. We therefore went through each year from 2000 to 2010, noting the total number of festivals that eFestivals listed, which produced the following indicative graph, as shown here, clearly showing the growth of festivals in the UK since 2000.

Figure 2: Number of festivals in the UK excl. N. Ireland (2000-2010)

Number of festivals in the UK excl. N. Ireland (2000-2010)



Source: festival listings websites

Or does it? Does this graph show only that the eFestivals website has increased the number of users? Or does it show, perhaps, that since 2000 the word ‘festival’ is now added to many events to add cultural cache? As we stated in the report, following amends by Festival Awards:

The above chart has been compiled from festival listings websites. However, there are obvious difficulties in accurately counting the number of UK music festivals. This year, for instance, *Music Week* reported there were 400 festivals scheduled, while the BBC reported a figure of 900 festivals. Research organisation Mintel cites a Rockwool insulation report which claims there are 715, while the Competition Commission review of the Live Nation/Ticketmaster merger in 2010 says Live Nation believes there are 345 festivals in the UK. The large discrepancy here is due in part to a lack of consensus on how to define the festival market. The festival sector is not a unified whole, but rather clusters of disparate festival types (camping/day, urban/rural, independent/corporate, state subsidised/commercial, dance/rock/world/art, etc.), each with very different needs. What we can say is that the UK festival market is among the most diverse in the world and continues to attract audiences old and new.

Commercial agendas

The Rockwool report mentioned above highlights another problem for academics involved in knowledge transfer: commercial agendas. Rockwool is a sound insulation company which produced a report that showed that Britain hosted 715 music festivals in 2010, providing a total of 2,820 days of entertainment. The question then becomes: why should a sound insulation company

be doing research into the UK festival industry? The following press release about the Rockwool report should explain it:-

There are a number of solutions available for those who are concerned about noise, including cavity wall and roof insulation and improving window insulation through double or triple glazing. While these steps may seem overkill for a festival that lasts a few days, in reality improving insulation will also boost heat retention and reduce household energy bills, so has multiple benefits for householders ('Britain Cements Reputation as Summer Party Hotspot With 2,820 Days Of Major Festivals In 2010', 2010).

A company attempting to sell sound insulation would perhaps be looking to obtain a high figure in order to boost sales, therefore using their data is problematic. Live Nation's estimate is also problematic – and contradictory even within the same report – as they were involved at the time in a Competition Commission investigation into the merger with Ticketmaster; their intention was assumingly to lower their relative market share in order to decrease claims of monopolisation.

The second point on the subject of commercial agendas is that Festival Awards is not without its own. The awards ceremony itself is sponsored by Smirnoff, Tuborg, Jaegermeister – alcohol manufacturers – Rizla – makers of cigarette rolling papers – HMV – the UK's biggest record store and now involved with a number of live music venues and festivals – Showsec – providers of security personnel to the live music industries – and Virtual Festivals. To reiterate Williamson et al, knowledge transfer may meet knowledge resistance when that knowledge is not what the 'users' – sponsors in this case – want to hear. In this case, due to the commercial rivalry between eFestivals and Virtual Festivals, Festival Awards requested that the source for the number of festivals graph shown earlier be amended from eFestivals to 'festival websites'. As market researchers, this lack of accurate (and honest) referencing is perhaps not a problem, whereas as academics, to deliberately obscure the actual source of the data felt slightly uncomfortable. But it was a compromise that we felt able to make, because we are at least free to tell cite eFestivals as the source in academic reports such as this as well as any correspondence that we have.

Lack of published methodologies

The above highlights a further problem for academics involved in market research: that of the lack of published methodologies. While we were able to include a list of sources in the final report, we did not include a full methodology, which can, of course, be academically problematic. Williamson et al's criticism of research into downloading carried out by the University of Hertfordshire on behalf of British Music Rights is that the report offered no methodology but 'only some statistics with a minimal amount of commentary' (Williamson et al, in press). The specific problem we

encountered is that the survey data set we were using was the commercial property of Festival Awards. They didn't want to make it public, they wanted to keep it private so they could monetise it. Interpreting data which is not in the public domain is, of course, common in the commercial sphere in which we were hired, but not in academic work. Our analysis of the survey data was rudimentary and easy to reproduce, but not, of course, without the original data set which might appear in the appendix of an academic piece of work, but which we were unable to provide in the report.

Disclaimer

In order to highlight the problems mentioned above, it was felt that we needed a disclaimer at the end of the report to justify our reluctance to publish figures that we felt decidedly uneasy about, and to point out the problems inherent in sourcing the figures required by the industry. Our disclaimer therefore stated that:-

There has been a rise in live music market research in the last few years, conducted not only by traditional market research firms but also organisations with competing interests in the festival market. The commercially sensitive nature of the data and a lack of published methods can result in disagreement about the value of market research, however. Furthermore, as mentioned earlier in this report, the diversity of the festival market means that existing research (including this report) may not always be targeted to meet the specific interests of its users.

The disclaimer perhaps made us feel slightly better, at least until we discovered the tiny point size in which it was printed in the final printed report. This neatly brings me on to the issues around the practicalities of how the report was put together.

Practical issues

Authorship

The first point to be made is about the authorship of the report, which was accredited to Matt Brennan and Emma Webster, but, as can be seen from the above, had a fair amount of input from Festival Awards, in particular James Drury, the managing director of Festival Awards and previously a journalist for the live music industry trade publication, *Audience UK*; he is not listed in the final report, however. This is a point that we were unaware of at the start; that there would be a 'third author' involved in producing the report.

The design process

The next point to be made is about the design process. Academics are perhaps used to editorial or printing errors in journals or books, but at least most are able to submit their own JPEGs of images or figures to be used. As the Festival Awards report was part of a longer report which listed the winners of the 2010 awards and a number of industry adverts, there necessarily needed to be a consistent design style. What this meant in practice is that the charts and graphs produced by us were translated by a designer. We had hoped to pre-empt any problems by sending over the relevant data to be transformed into the relevant charts. What we had not anticipated was that the designer would instead recreate the charts seemingly freehand, as shown by the following figures.

Figure 3: Average UK festival ticket prices from 2002-2011 (original)

This is the actual graph of ticket inflation, but this graph was translated by the designer into the following:-

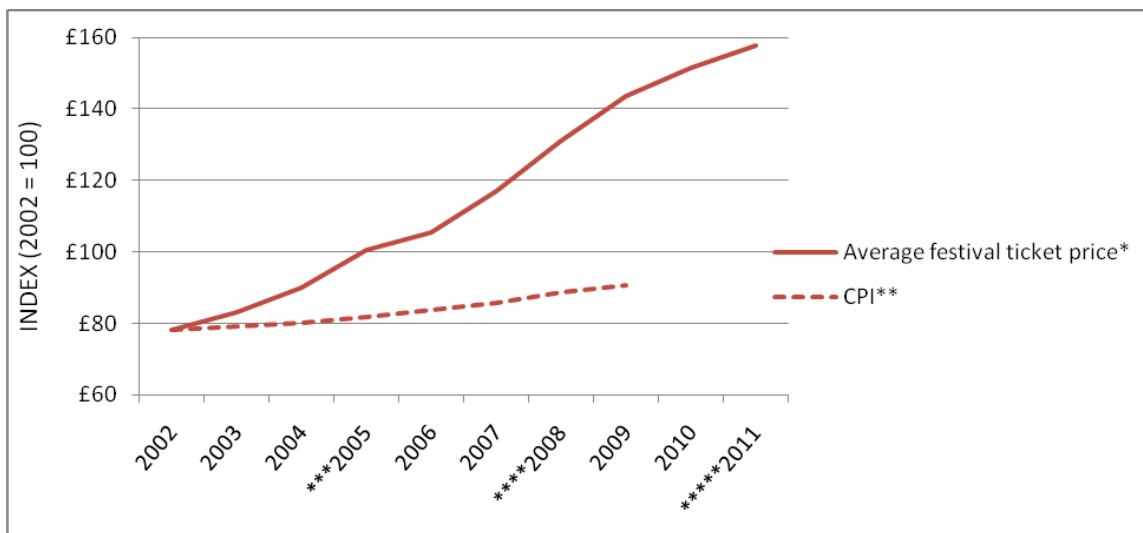
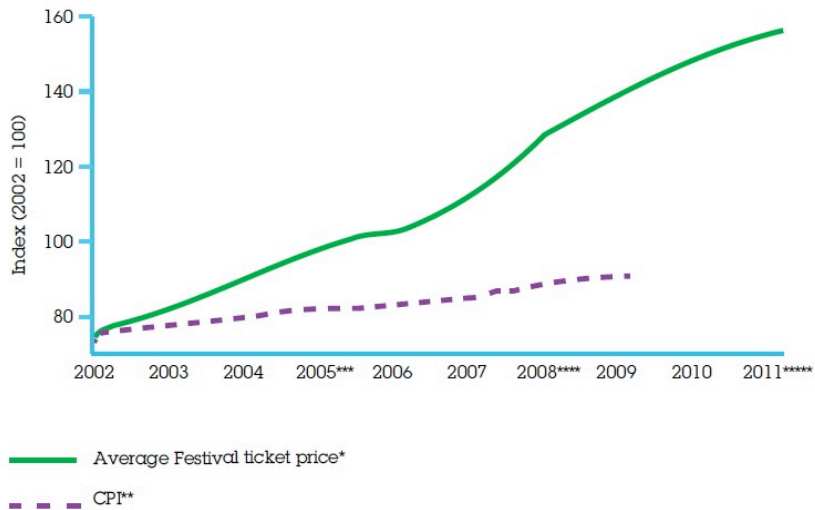


Figure 4: Average UK festival ticket prices from 2002-2011 (designed)

Figure 3: Average UK festival ticket prices from 2002-2011 INDICATIVE



As can be seen, the green line is an approximation of the actual line on the original chart, and the x-axis starts in a different place from the original, meaning that the designer has extended this to the y-axis and seemingly made up a start point. All very frustrating, although it should be pointed out that the designer did redraw the graph after this was highlighted in our amends. This was not the only example of odd design interpretation, however, and other examples included: moving figure 12 before both figures 10 and 11, seemingly because it looked better on the page; and dividing a percentage axis into thirds rather than quarters, as can be seen here:-

Figure 5: Comparison of very and fairly important factors to festival-goers compared to 2009 Census

This figure contains data generated by Festival Awards that is not in the public domain and not published without permission.

While these mistakes were mostly rectified, what this means for knowledge transfer is the difficulties in maintaining academic accuracy with designers' foibles and the importance of proof-reading and sign-off, as will now be addressed.

Proof-reading and sign-off

The final practical issue to be addressed is that Matt and I had specifically requested that we would be able to see the final draft of the report before it went to the printers, which, unsurprisingly, came down to the wire in terms of the print deadline. However, in the end we ended up waiting to sign off on the final proof over e-mail, unaware that it had already been sent off to the printers, meaning that there still a few inaccuracies in the final programme. The question then becomes: what to do in

this situation? Kick up a fuss by insisting that the original agreement has not been respected and decline to attend the conference, or compromise in the hopes that by being able to present and interact at the conference, we could gain better insight into how the festival industry worked by moving further inside the commercial process? We opted for the latter on this occasion but this again raises the potential practical problems of knowledge transfer. However, while at the conference, we heard time and time again from people working in the industry that they felt there was a big discrepancy between academic knowledge gleaned from public domain accounts of industry practices such as Competition Commission and press reports, versus how the industry actually worked and was understood by insiders.

Aftermath – media interest

The final section of this paper will address the aftermath of the Festival Awards report, and the first point to be made is the dissemination of our research in the public domain by the media. So far, only industry trade publication *Music Week* has included a feature on the Festival Awards report, although there were other journalists present at the Conference and the Awards ceremony. While the *Music Week* article reads mostly like a press release from Festival Awards, it refers to both Matt and I and our university affiliations. The first paragraph of the article read thus:-

The rise in VAT coupled with a proposed hike in the PRS for Music tariff for live music could signal a further increase in festival ticket prices, despite research indicating that promoters have been consistently pushing prices above the rate of inflation for the past decade (‘Cost of festivals set to rise further in 2011’, 2010).

We had been very careful in the report *not* to say that the PRS was ‘proposing’ a hike (they deny this), but rather that a hike was possible and that a review was taking place, but the first sentence of the article perhaps suggests otherwise. Obviously, media interest in academic work always runs the risk of misinterpretation and this is perhaps something for discussion today: how to disseminate academic research (and market research) via the media with the least amount of inaccuracy?

Conclusion

So to conclude, after all of the above, did we, in fact, produce ‘useless knowledge’? The answer has to be a careful ‘yes’ and ‘no’. The old adage, ‘rubbish in, rubbish out’ is very apt here, but Matt and I believe that we did the best we could with unreliable and elusive data. Has the report served its purpose? Festival Awards seem happy with our work, and a marketing and events manager at an English student union contacted me afterwards to say that, ‘Already the festival research is being put to great use and I reckon might even change the focus of our event next year’ (anonymised).

Would we do it again? The answer is a qualified 'yes', but if we did it again, it would have to be done somewhat differently. It was a fascinating piece of research to work on and we learned a great deal; we now have a much greater depth of knowledge as academics than if we had not compiled the report ourselves. For example, Matt and I have gained both valuable data and an extremely valuable dose of cynicism from experiencing first hand where music industries data comes from. However, in the future, if possible, we would like to see more academic rigour when gathering survey data and to have more of an input into the methodology and data collection. The question then becomes, is knowledge transfer by academics even possible to do while upholding academic principles? What are those principles? How far should one compromise? Is there any way that market research and academic research can be reconciled or do we have to accept that by undertaking client-driven market research, academics have to make compromises, or is there a way to successfully combine academic rigour with market research sensibilities?