

## 7 Conclusions and considerations for the future

The study clearly shows that the Glastonbury Festival has a significant economic impact (both locally and across a wider geographical area) with figures greater than for comparable festivals or events elsewhere in the UK.

The strong local trading ethos of the Festival benefits the local economy. The contracting with local charitable organisations also offers major benefits to the community.

Many on-site traders specialise in providing services to festivals and therefore source their products and staff on a national basis. The local economy could potentially benefit further through the strengthening of local purchasing and supply chains.

The local economic impacts of the Festival are felt most strongly in the nearby towns of Glastonbury and Shepton Mallet. Generally, it is felt that Shepton Mallet gains more during the Festival period, but that Glastonbury benefits more throughout the year because of its clearer geographical and cultural associations with the Festival.

Proposals to capture increased local economic benefit include the potential for Shepton Mallet to capitalise further on its role as a base near to the Festival site; ensuring that accurate information and publicity (particularly regarding traffic) is promoted to emphasise that Glastonbury is 'open for business' during the Festival; the further potential for 'greening' trading practices related to the event, and the possibility of attracting more specialist festival-support companies to relocate to the Mendip area (adding to the existing cluster of such provision locally).

## 8 Monitoring and future updating

Mendip District Council and Glastonbury Festivals Ltd are keen to use this study as a baseline to monitor the economic impacts of the Festival in future years.

The license controlling the numbers of people attending the Festival is now fixed for a four-year period. This implies that the format of the Festival and its overall impact is likely to remain fairly constant during that time, unless any new external factors or variables emerge - such as changes in festival-goers' travel patterns, criteria used to allocate traders' pitches or changes to on-site alcohol licensing.

To monitor the short-term effects of any such changes, it is recommended that the on-site survey of Festival-goers is re-run bi-annually, using a smaller sample (250 to 500 respondees). Additional feedback information could also be gained through asking specific questions in other surveys such as the annual Green Traders' Survey or in any business surveys conducted by Mendip District Council or local Chambers of Commerce. The results of snapshot surveys could then be used to amend the assumptions within the current economic model to provide updated estimates.

Should the Glastonbury Festival change in a significant way in the future (e.g. through any changes to the license, allowing higher ticket numbers, or through other variable factors), it is recommended that the wider survey process is conducted again.

Glastonbury Festival currently enjoys a highly-regarded reputation within music and cultural circles. However, the potential future growth of festivals elsewhere suggest the need for continued monitoring of the impact of the Festival and its position within the wider market.

A copy of the full report can be downloaded from [www.mendip.gov.uk](http://www.mendip.gov.uk) or [www.glastonburyfestivals.co.uk](http://www.glastonburyfestivals.co.uk).

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# Glastonbury Festivals 2007 Economic Impact Assessment Executive Summary





1 Background

Glastonbury Festival is a world renowned music festival and the largest of its kind in the UK. The festival is held annually over the last weekend of June.

Mendip District Council and Glastonbury Festivals Ltd (GFL) commissioned Baker Associates to undertake an economic impact assessment of the 2007 Festival.

The aim of the study was to improve the understanding of the economic impact of the Festival by quantifying the overall impact of the event on both the local and wider areas.

2 Methodology

The methodology for the study comprised the following components:

- The estimated expenditure by GFL associated with holding the 2007 Festival was £21.2m (over the period November 2006 to October 2007).
- Estimated gross on-site expenditure was £25.6m, and gross off-site spend was £26.5m, giving a total estimate of £52m gross expenditure directly related to the Festival.
- This equates to an expenditure of £2.45 by visitors to the Festival for every £1 of expenditure by Glastonbury Festivals Ltd.
- In terms of net impact on the local and regional economies, allowing for deadweight, displacement and the multiplier effect (explained in detail in the full report), the estimated total impact in the Mendip District resulting from the Festival was £35.8 million; £2.4 million in the Bristol/Bath area, and £45.2 million in the South West as a whole (including Mendip).

- Recent studies by South West Tourism estimate the total visitor spend in the Mendip District to be around £180 million per annum; spending by Festival visitors represents over a seventh of this total.
- Using the above net economic impacts, estimates of equivalent employment generation (FTE's) were:
  - Mendip - 929 jobs
  - Bristol/Bath - 49 jobs
  - Rest of South West - 233 jobs
  - South West as a whole - 1110 jobs.

The study considered the trading activities and impacts of Glastonbury Festivals 2007 Ltd (GFL), which involved all activity by GFL outside the core Festival period. This includes permanent staff costs and the expenditure of hosting the two associated events - the Glastonbury Extravaganza and the Equinox Party (formerly known as the Pilton Party).

3 Headline Results

- Average spend per person (per trip) was £144.11 on site and £149.13 off site, giving a total personal spend of £293.24 (excluding ticket costs but including transport costs).
- The greatest on-site expenditure category was food and drink purchases, taking an average 83% of Festival visitors' on-site expenditure.
- 71% of respondents spent four or five nights away from home on their trip to the Festival. A total of 11,333 nights were spent away from home by survey respondents with 92% of these spent on-site.

- Glastonbury Festival was the sole reason for 94% of respondents' trips. 61% of respondents said attending the Festival meant they would be more likely to come back to the Mendip area again on another occasion.
- 56% of businesses surveyed reported an increase in their turnover as a result of the Festival. Half of the responding businesses who reported an increase were accommodation providers.

5 Local Business Survey

- 16% of businesses were able to secure additional trading opportunities outside their normal area of business (eg. supplying the Festival or having a stall at the event).
- 37% of businesses stated that their overall perception of the Festival was that it had a positive or very positive impact upon their business.
- One of the main issues raised was the loss of business experienced in Glastonbury town centre as people stayed away from the town during the Festival period. This was felt to be particularly influenced by inaccurate traffic reporting.

4 Visitor Survey

The purpose of the study was to profile and quantify the overall economic impact of the Festival through established techniques. However, during the research, the team identified a number of more subtle economic impacts which should be highlighted. These included :

- a) Contracting with not-for-profit organisations. Glastonbury Festivals provide a number of trading opportunities (such as safety, stewarding and recycling) for not-for-profit organisations (including international charities, schools, carnival clubs, scouts etc).
- b) Image and perception of Glastonbury town and wider Mendip area.
- c) Increased trading opportunities from association with the Festival. Many companies commented on how important it was for them to be associated with the Festival to their own marketing or promotional activities.

d) Greening Businesses. A number of companies reported that the strong 'green' ethic of the Festival had changed their mainstream business practices.

e) Contributing to a local entrepreneurial culture. The Festival contributed to a greater than average entrepreneurial culture amongst local people and businesses - including providing a one-off informal trading opportunity during the Festival period or supporting the growth of companies which provide specialist services to festivals.

f) Contributing to the vitality of Pilton village. Glastonbury Festival makes an annual donation to a village facility or service. Over recent years, these have included building the new Pilton Working Men's Club, renovating the Tylthe Barn in Pilton, and building affordable homes in the village for local residents.

6 Less Quantifiable Outputs