

**FUTURE FESTIVALS SURVEY  
BY  
TALLINN MUSIC WEEK  
REPORT**

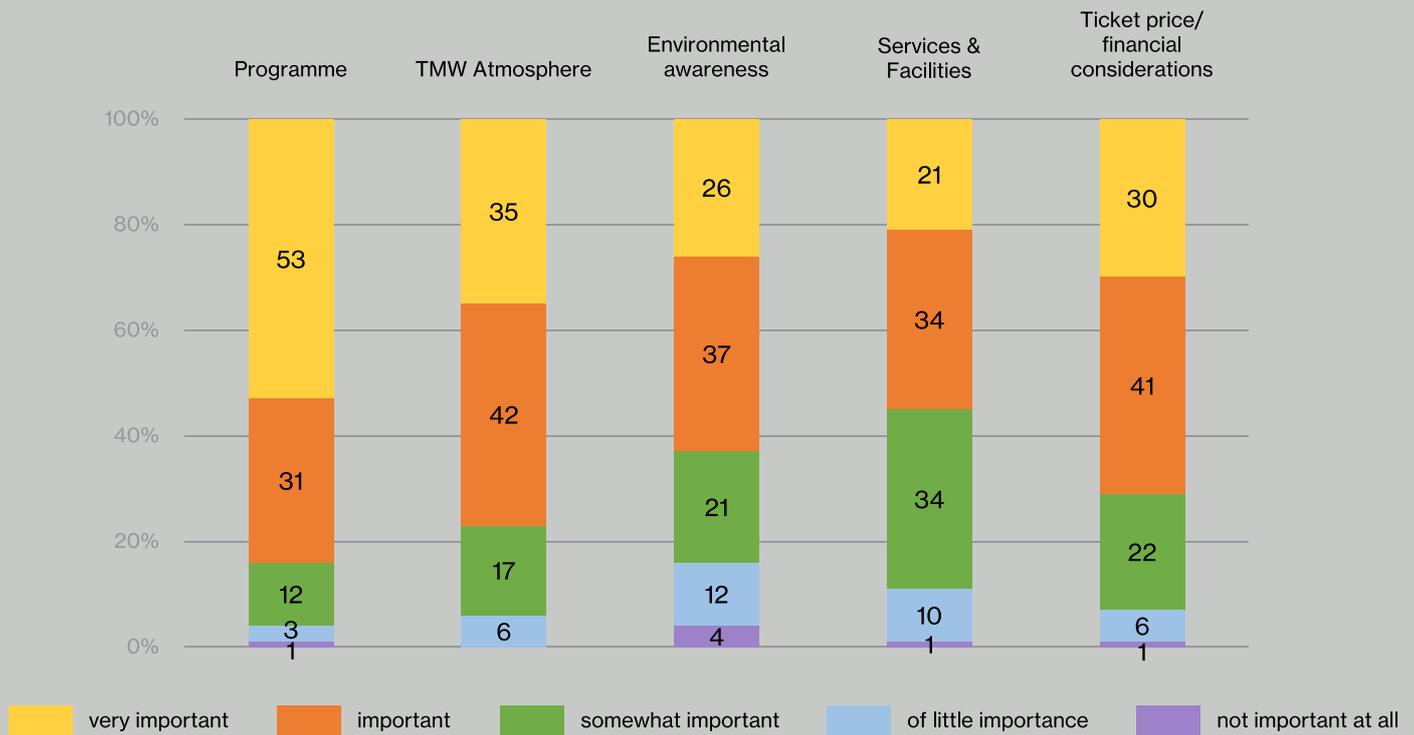
# Future Festivals Survey

From 21.04 to 4.05.2020 the Tallinn Music Week (TMW) festival carried out a survey among its artists, visitors and partners to find out what a festival of the future should be like and how TMW could be more beneficial for the music and culture sector as well as the society in general.

In the course of answering the questions, TMW artists, visitors and partners had a chance to voice their opinion about which directions TMW and other similar showcase festivals should develop in and to give their evaluation of the festivals experienced so far. The survey included questions targeted at specific interest groups as well as more general questions that addressed all respondents across the board, with topics ranging from digital consumption habits to the wider cultural and social impact of showcase festivals. The following overview includes the results of the survey on the following topics: the general reasons why artists participate at showcase festivals, why PRO clients participate at TMW, why partners participate at TMW, behavioural patterns during isolation, and suggestions on future festivals among all interest groups.

245 respondents from 32 countries completed the survey, among them 84 artists, 27 representatives from partnering organisations and 134 festival visitors.

# 1. Visitors' reasons for participating at TMW



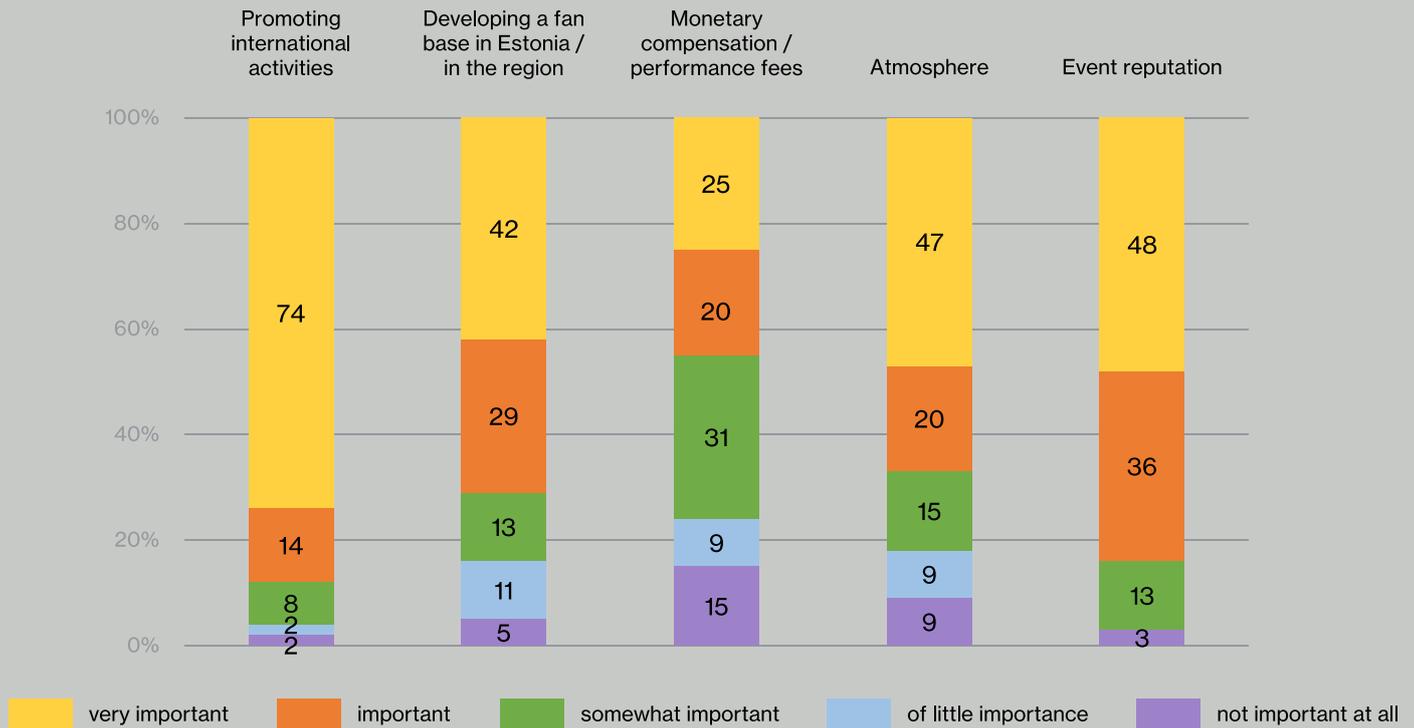
**"A unique approach to joining music and social topics."**

**"Smart curation, cool venues, good networking opportunity."**

**"Just wonderful, not afraid of experimentation and errors."**

According to the results of the survey, the average TMW visitor is 29 years old, has attained higher education, and their main reason for visiting the festival is to enjoy music and spend leisure time in a way that provides both quality and fun. The respondents visit 2 - 5 cultural events per month on average, spending 25 - 50 euros per month. The most important criteria for visitors when choosing a festival to take part in are: the programme, the atmosphere and ticket price followed by environmental awareness, amenities and services location and time of an event.

## 2. Artists' reasons for participating in TMW



**"TMW 2019 gave my career a big boost, since I took advantage of the TMW platform as much as possible. I got a lot of attention and, thanks to that, a lot of gigs from then on."**

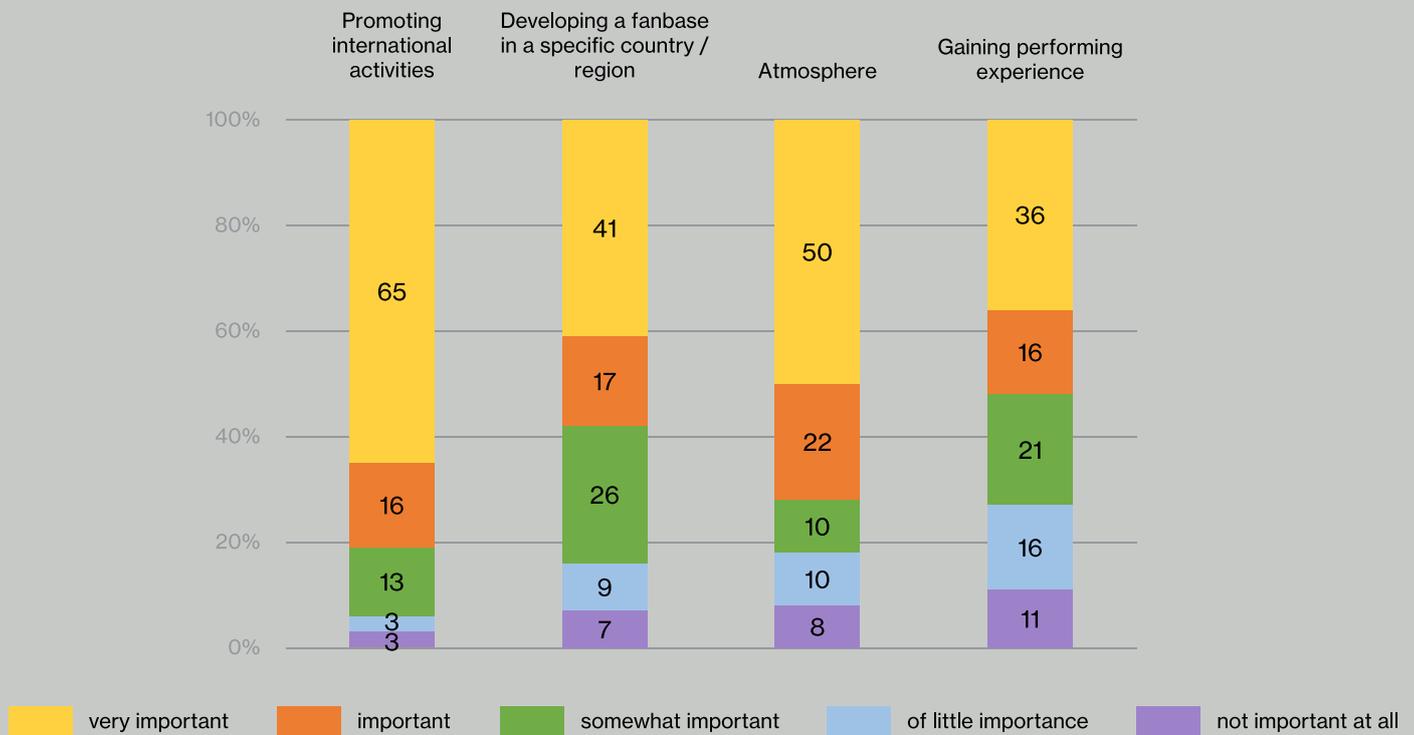
**"In addition to the educational and entertainment element, it is definitely worthy to present the internal mechanisms of the sector to the music consumer, who does not think about how music reaches him/her. It's possible to draw attention to socially important topics through an enjoyable programme."**

**"I gained visibility in Estonia, new international contacts, several international reviews, even a new international agent, great video material, which I have made ample use of in different formats later on, loads of experience for myself as well as my manager, and the feeling that they have our backs at home, which is a great foundation for any further international work. Each time I have had the opportunity to perform there, TMW has always been a very beneficial and pleasant experience for me."**

**"I got more attention in my own country thanks to some of the other bands, who were performing at TMW. Being chosen for TMW is an achievement and a sign of quality for the local promoters."**

54% of the foreign artists and 85% of the Estonian artists who responded had performed at TMW before. Among both foreign and Estonian artists, nearly three-quarters of the respondents said that they perform at 1 - 3 showcase festivals per year. Nearly three-quarters of the artists who responded had achieved the goals they set for performing at TMW, and more than three-quarters would also recommend performing at TMW to other artists. The main reasons respondents gave for performing at TMW were promoting international activities and taking in the festival atmosphere.

### 3. Artists' reasons for participating in showcase festivals in general

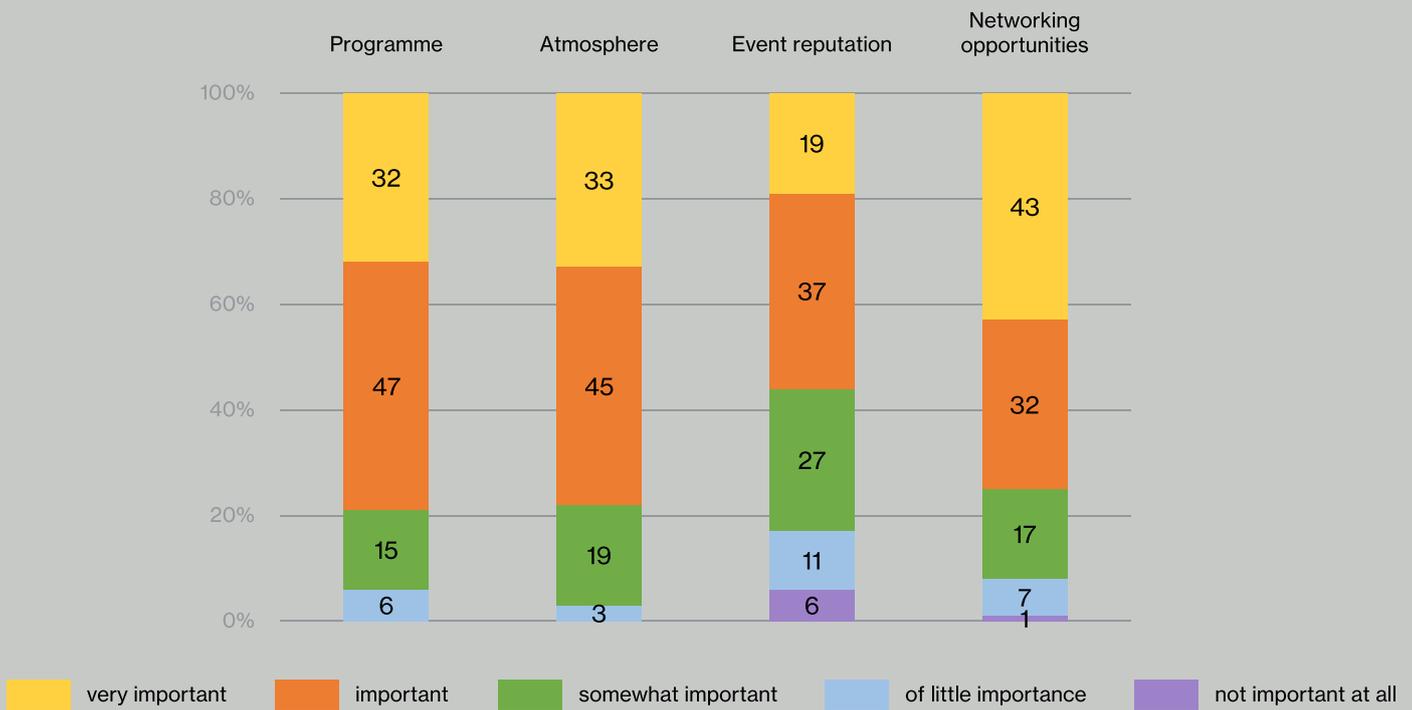


**"Finding like minded and spirited people, with whom I could develop new ideas and activities."**

**"For making new contacts and keeping up with existing ones; catching up on the latest trends, general directions and getting a sense of the overall moods."**

The main reason artists gave for participating at showcase festivals was promoting international activities, followed by gaining performance experience, developing a fanbase in a specific country or region, taking in the festival atmosphere, and the opportunity to travel and perform abroad. The main reason why foreign artists would not perform at a showcase festival was if the festival's reputation was bad, and among Estonian artists the most prevalent reason for not participating was related to financial issues.

# 4. PRO clients' reasons for participating at TMW



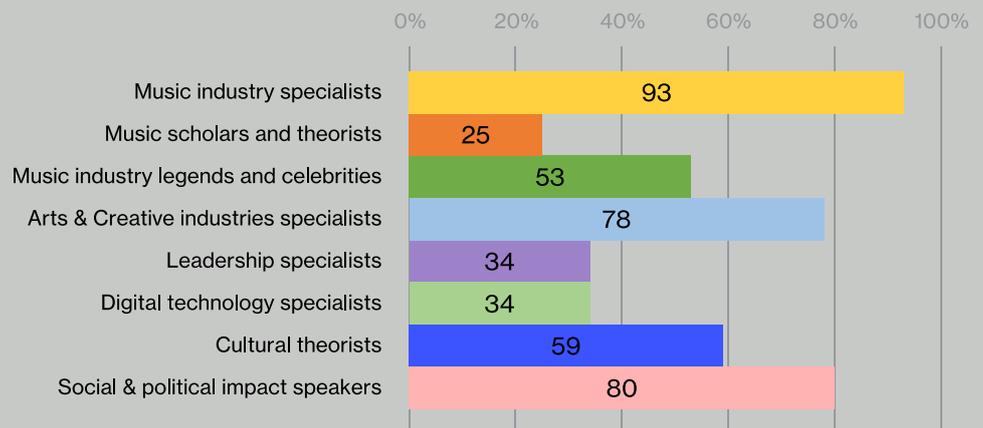
**"An interesting look inside the Eastern and Northern European markets, as well as Russia."**

**"Smart curation, cool venues, good networking opportunity."**

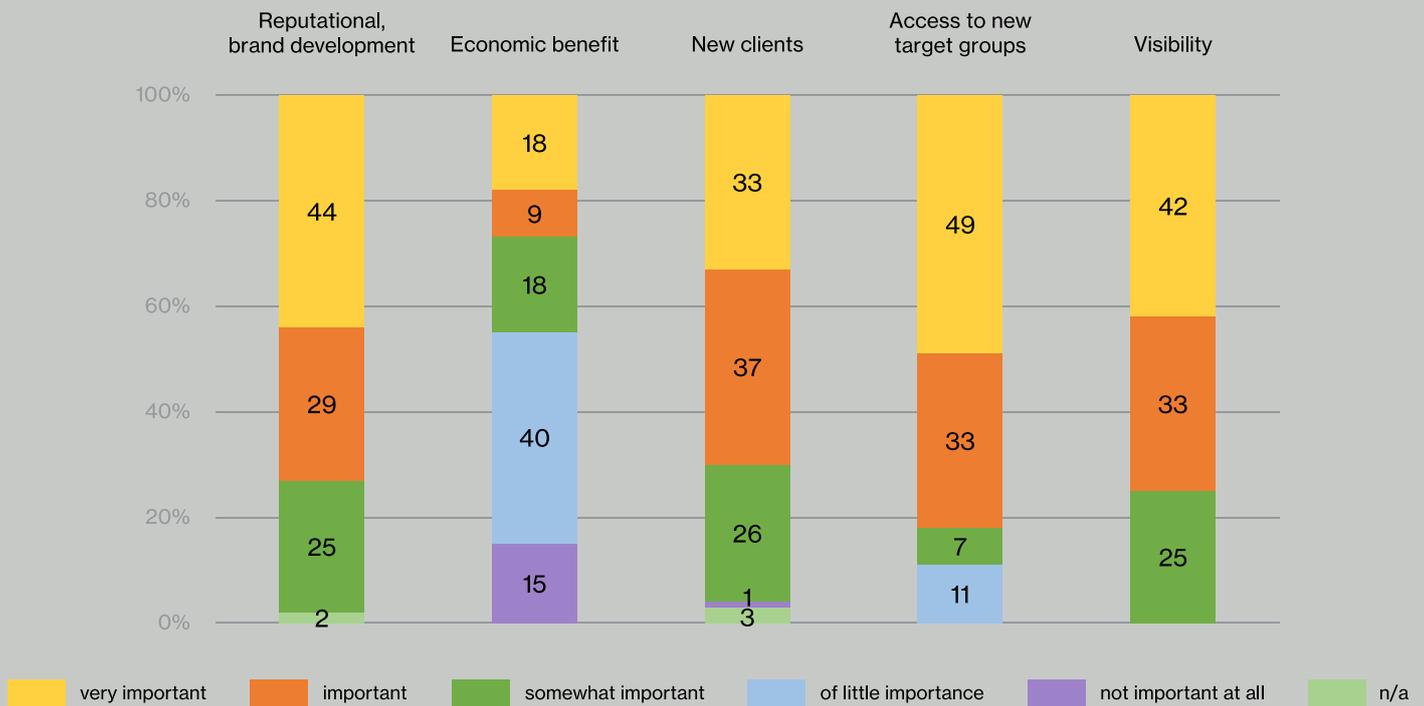
According to the survey, the average PRO client (a Conference + Festival Pass holder) at TMW is a 40.5 year old music industry professional with higher education, whose main reasons for visiting TMW are the festival programme and atmosphere. Three-fourths of respondents in this group found that the number of artists performing is just right.

PRO clients pointed out that in general they dislike the following aspects at conferences: the general superficiality of the programme, overcrowding and tight schedules. Their expectations of an ideal future conference include a strong and challenging programme, with a thoroughly developed format.

Which kind of speaker profile should be represented more at TMW Creative Impact conference?



# 5. Partners' reasons for participating at TMW



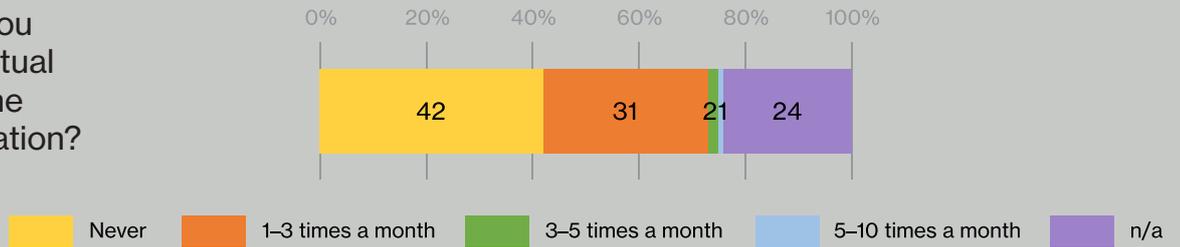
**"We would like TMW to be contemporary and reflect quality and new exciting developments in the local music scene as well as the global one in their musical lineup."**

**"Gaining and sharing new knowledge, novel ideas, access to new networks and markets, development models and artists' sustainability."**

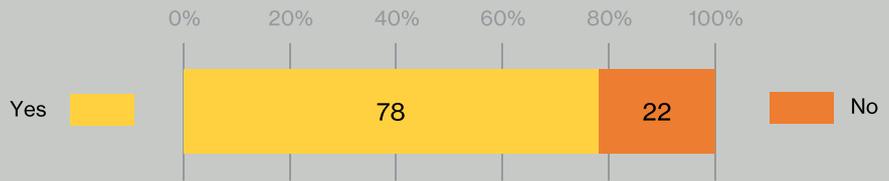
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# 6. Behavioural patterns across interest groups during the isolation period

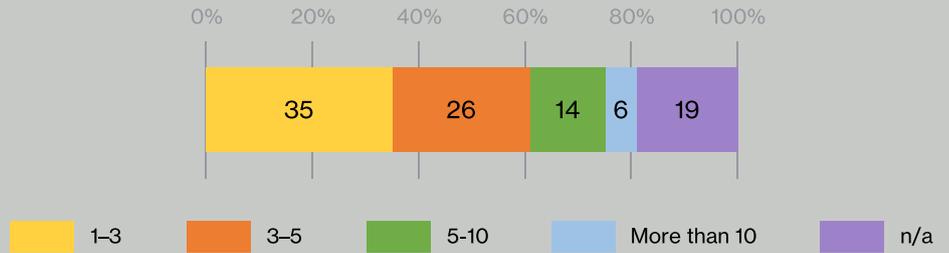
How often did you participate in virtual events before the emergency situation?



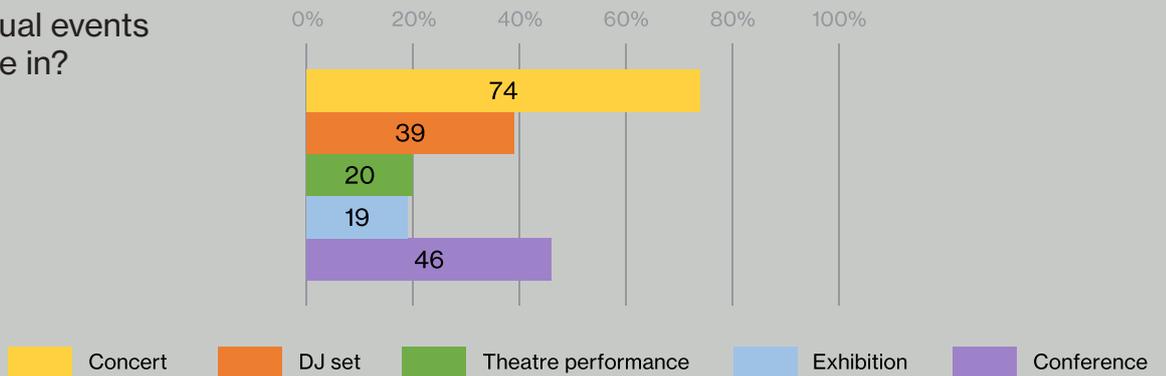
Have you participated at a virtual event during the emergency situation?



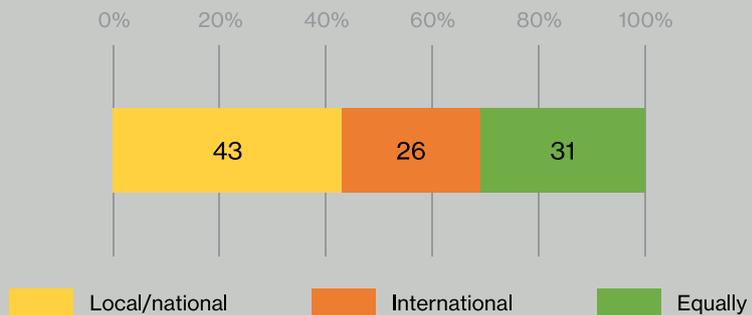
How many virtual events have you participated in during the emergency situation?



Which kind of virtual events did you participate in?



What kinds of virtual events did you participate in most?

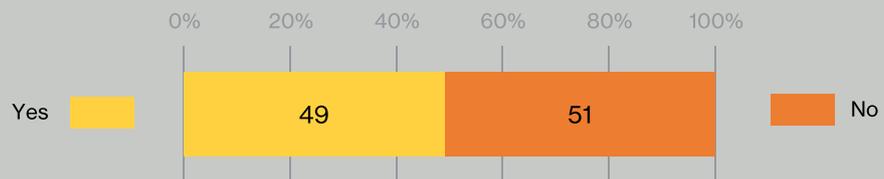


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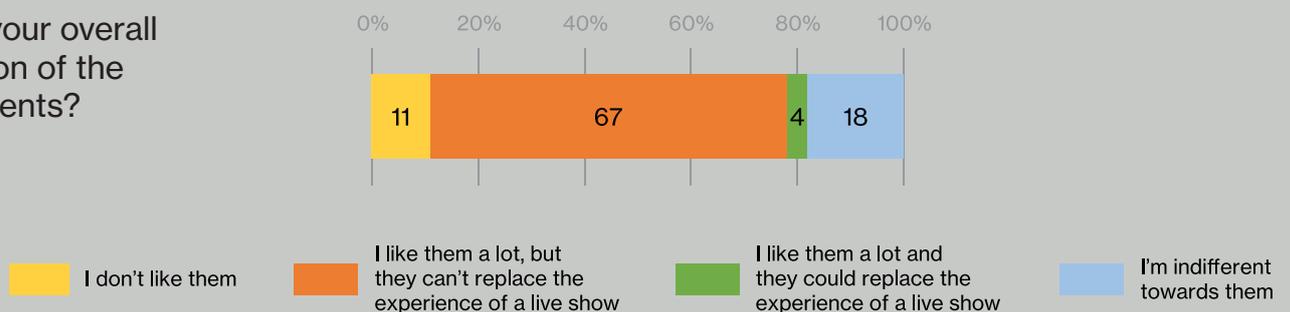
How much are you willing to pay for a digital experience compared to a live event?



Have you experienced something during the emergency situation through digital solutions that you did not have access to before?



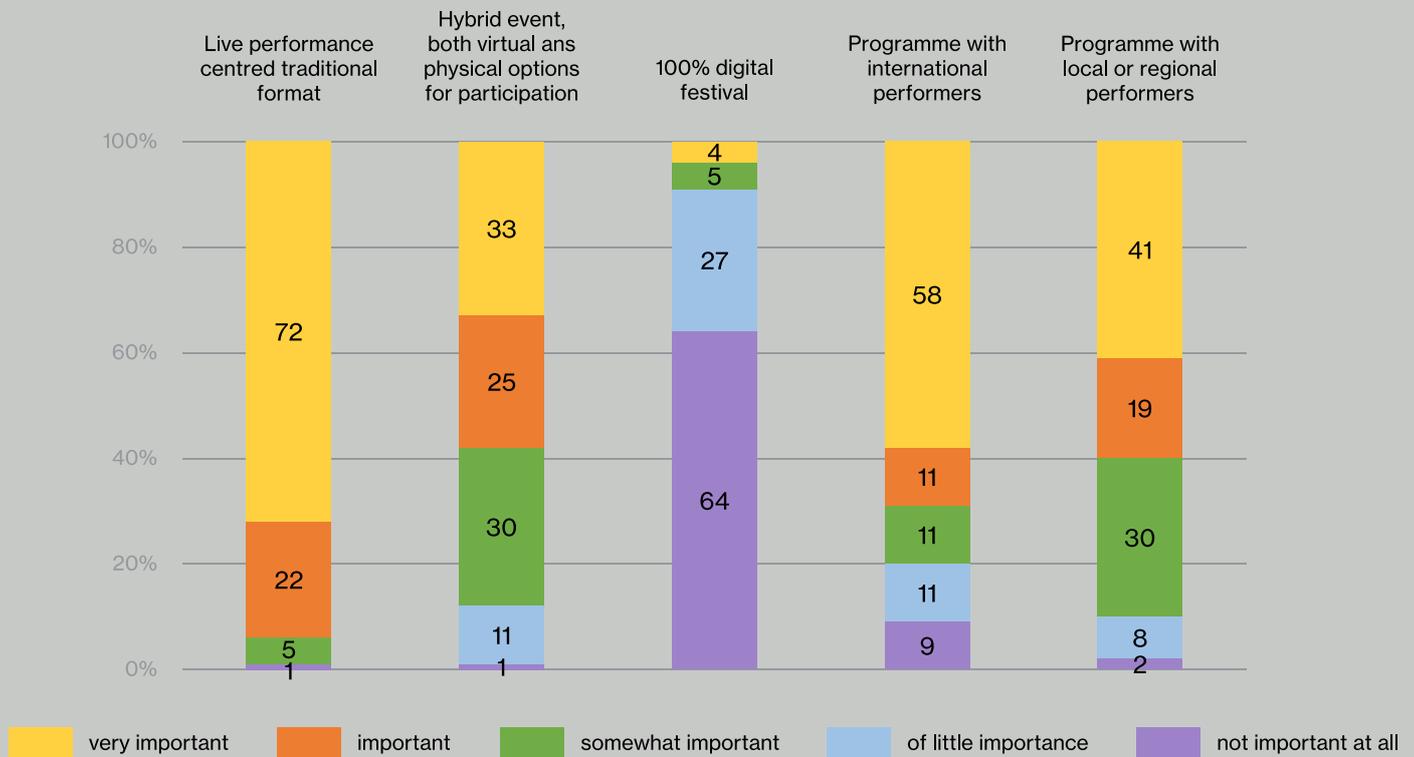
What is your overall impression of the virtual events?



**"Nothing replaces a sweaty live show."**

**"I believe that to some extent we will move more towards virtual reality in the future, however, just imagining what it is like is not enough for people, they want to attend events in real life. People need close, real life social interaction, and that can never be replaced by virtual services. Yes, to some extent they will have a greater role in the entertainment world in the future too, however, people will still value the "real thing"."**

# 7. Future festival format ideas from artists and partners



**"Smaller, more focused, more meaningful, more attention to scheduling and environmental problems."**

**"Clearer focus and the utmost persistence are needed."**

**"Highlight the obvious impact of arts on the development of society! Music is not just someone's pastime product, but an integral part of human development, the creation of fantasy and the spirituality of society, both collectively and personally. It's about time!"**

# 7. Future festival format ideas from artists and partners

Development trends that respondents wanted to see most at festivals include: a more concrete focus and objective, user-friendlier time schedules and less performers. In addition, quality entertainment and a pleasant atmosphere were pointed out as important factors.

Expectations for future festivals included, first and foremost, artistic and programme diversity, good info sharing capacity, sustainability, environmental awareness, social responsibility and artist empowerment. Other expectations that were pointed out included easier-to-grasp logistics at festivals, cleanliness and avoiding overcrowding. When it comes to future trends, respondents estimated that live music will remain popular after the crisis as well, however, they expect that future festivals will have an added virtual format, for example, live streams.

In terms of expectations towards showcase festivals as music industry facilitators, the respondents pointed out discovering and promoting young talent, creating an environment that allows for communication between different music industry representatives, and facilitating cooperation of all kinds in general.

The questionnaire of future festival trends was also impacted by the state of emergency, enabling the respondents to answer questions about the preferences of live and digital events in a more experiential way. The results gave a fairly clear overview of the preferences, motivation and goals of the performers and visitors of the showcase festivals. The artists' responses showed that they are not entirely aware of all the opportunities that TMW provides for career development, as many of the activities suggested have actually been included in the TMW programmes. The logical conclusion here is that going forward, the festival should improve and personalise communication with the artists about the opportunities on offer, map the needs of the music industry more precisely, and, based on those needs, offer specific, practical solutions.

# Summary and conclusions

Based on the results of the survey, it can be concluded that TMW and other showcase festivals are important across all studied interest groups, both as vehicles for promoting the music ecosystem and industry and as providers of unique, high quality leisure time. Expectations towards showcase festivals include, first and foremost, diversity in the curatorial and programming approaches, less overcrowding as well as less redundancy and self-repeating elements in the programme. Emerging trends in expectations include environmental awareness, social responsibility, fostering cooperation between artists and sectors, as well as supplementing the traditional live music format with novel digital and hybrid solutions.

In summary, it can be said that the gathered data set is important for the planning and implementation of TMW development, and it also provides plenty of food for thought on the topic of future showcase festivals in general.

**Tallinn  
Music  
Week**

**27.–29.08.2020**