



Crafting the Festival Experience 2.0

Unveiling the Key Ingredients for Designing Transformative Experiences

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Today, festivals are not only about music, they serve as real-life platforms for networking, social initiatives, raising awareness about social issues, and promoting inclusivity and diversity.

Experience lies at the heart of festivals and expectations from festivalgoers are high, pushing organizers to

develop immersive, flawless interactions, both digitally and on location.

It is becoming increasingly important to look beyond numbers and understand festivalgoers in terms of the wider aspects of their lives in order to tailor truly memorable experiences.

In 1969, up to half million people gathered in a field in Bethel, New York to experience what was to become one of the defining moments of music history.

Woodstock Rock Festival brought together some of the era's most legendary performers and fervent music enthusiasts from all corners of the USA for a three-day event. Initially designed for 50,000 attendees, a field was secured from local farmers as the envisioned stage and logistical hub.

The attendance rate, however, far surpassed the original expectations, compelling the organizers to dismantle fences and ticket booths, to orchestrate a collaborative effort with the local police to manage traffic congestion

and coordinate with helicopters for the delivery of essential resources, including water, supplies, and artists. Amidst these logistical challenges, utmost attention was also dedicated to ensuring the safety of all attendees.

Consequently, a remarkable sense of community swiftly emerged, with individuals uniting to prepare food on-site, establish sleeping areas, and ensure the equitable distribution of water supplies.

Beyond being merely a music festival, Woodstock remains an enduring testament to people's determination to voice their core beliefs and address pressing societal concerns of that era.



The music festival industry has undergone significant transformations since the early days of Woodstock, with various factors converging to help organizers manage large-scale events.

Notably, technology has emerged as a pivotal catalyst, driving enhanced efficiency. Concurrently, festival attendees' expectations have evolved.

They now expect frictionless experiences throughout their entire journey, spanning from the

moment they discover the lineup up to the ticket purchase process and the actual festival days.

Complicating matters further, festivalgoers now post on social platforms and can instantly share their awe-inspiring encounters or voice their disappointments.

Festivalgoers are now to be viewed as both (content) producers and consumers. This content extends beyond the festivals themselves and encompasses aspects such as fashion, ambiance, and activities.

Consequently, the design of liminal transformational experiences must be guided by these factors, and conditions must be met, placing additional pressure on organizers to ensure a flawlessly executed event.

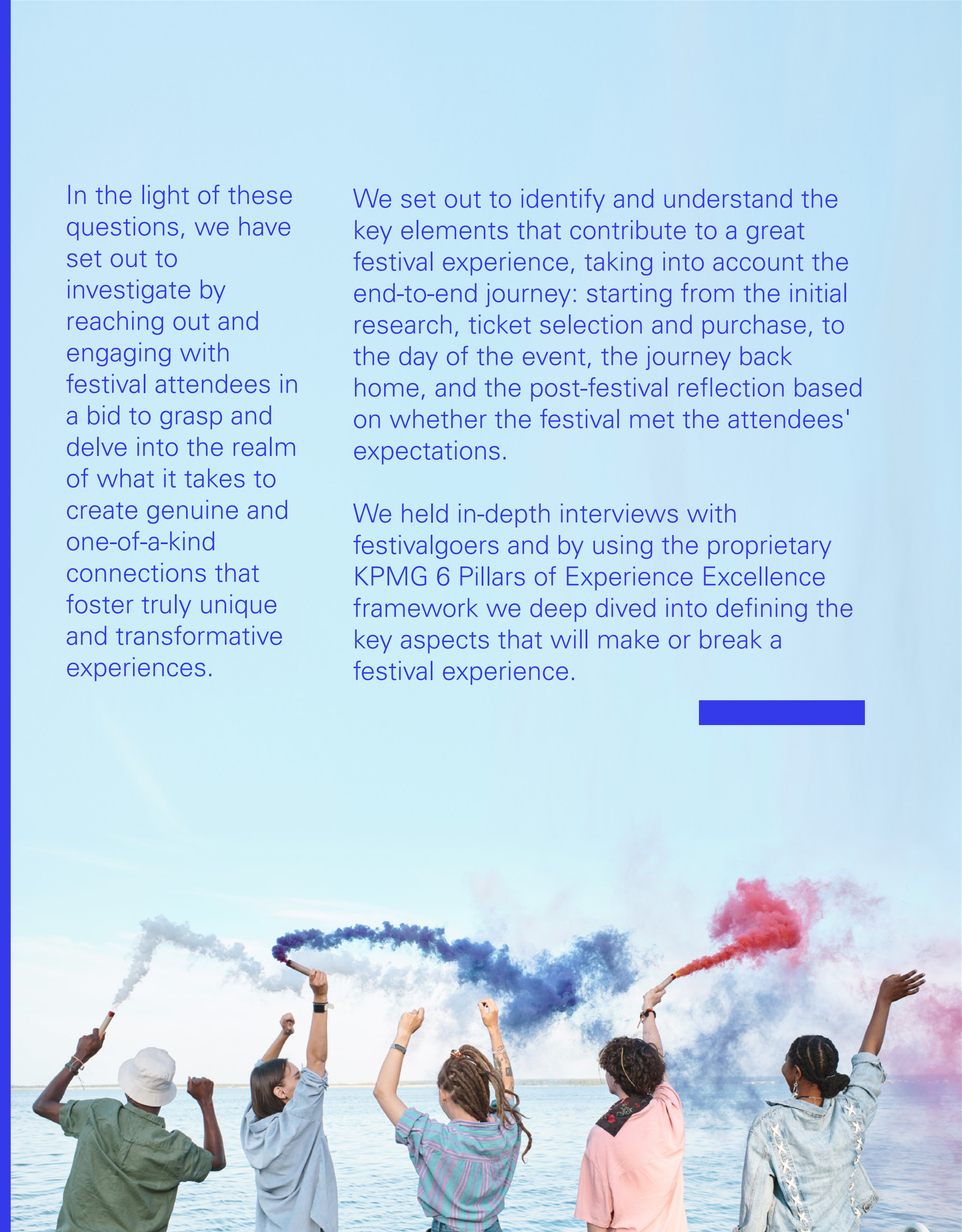
In this dynamic landscape, what makes a festival stand apart?

What precisely constitutes the elements that can either make or break the overall experience, and what are the contemporary expectations that festivalgoers have today?

In the light of these questions, we have set out to investigate by reaching out and engaging with festival attendees in a bid to grasp and delve into the realm of what it takes to create genuine and one-of-a-kind connections that foster truly unique and transformative experiences.

We set out to identify and understand the key elements that contribute to a great festival experience, taking into account the end-to-end journey: starting from the initial research, ticket selection and purchase, to the day of the event, the journey back home, and the post-festival reflection based on whether the festival met the attendees' expectations.

We held in-depth interviews with festivalgoers and by using the proprietary KPMG 6 Pillars of Experience Excellence framework we deep dived into defining the key aspects that will make or break a festival experience.



The Pillars of Experience Excellence

The KPMG Six Pillars of Customer Experience Excellence represent a set of key universal principles that support successful customer relationships and outstanding experience.

They have been developed as a result of thirteen years of primary research across

3,000 brands in 26 countries

around the world and have been validated across various industries and customer types. Businesses that understand the Six Pillars have proven to deliver enhanced outcomes, grow more quickly and derive greater

shareholder value. Whether that is increased share of wallet, loyalty, or advocacy, the six pillars represent prerequisites for commercial growth.

As they are all interconnected, it's essential to have good scores for all six of them. However,

Empathy & Personalization

are the pillars correlated with the highest Net Promoter Scores (9-10) and they lead to customers' loyalty and long-term engagement with brands.

For organisers, these principles translate into a need to focus on customer engagement, organise activities centred on the customer and develop unified, personalized, immersive experiences – both online and offline.

Here's what our findings revealed



Only by really standing in festivalgoers' shoes, and experiencing things as they do, can organizers really hope to engage successfully with their audience.

As a pillar, Empathy is all about into their customers' shoes and experience things as they do.

This translates into an understanding of individual situations while offering explanations in an unambiguous manner.

Organizers that act with care and acknowledge how their customers are feeling when it comes to queues, missing pieces of information or on-site frustrations, and communicate appropriately are the ones that gain customer terrain and establish an emotional connection with them.

This is where the staff on site also play a key role, as they are quite often the first point of contact for questions, complaints or general.

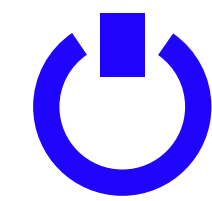


Personalization

is the key component that makes customers feel they are at the center of the experience, and that things have been tailored to their needs, wishes and lifestyle.

This pillar is particularly important for festivals – truly understanding the profile of their attendees enables festivals to invest in the areas that make a difference: first and foremost, securing a relevant line-up, but also choosing the optimal marketing channels, designing the festival activities and co-opting the relevant partners. The first step in this

direction is understanding the customer segments – more on this below, as we explore the idea of festival personas.



Time & Effort

Minimizing customer effort and creating frictionless processes in the end-to-end festival experiences, across channels is key.

Time and Effort means systematically removing unnecessary steps in the process to enable the customers to achieve their objectives in a timely and effective manner, and make

time investments feel worthwhile.

The Covid-19 pandemic increased the demand for convenient access to products, services, and relevant information – a new way of life requiring seamless interactions. This is where digitalization comes into play, an area which all interviewed festivalgoers seem to agree is essential for the experience.

A seamless digital experience offers attendees an integrated ecosystem which allows for the main steps of the journey to be undertaken easily – purchasing or reselling tickets, topping up easily, getting information about the location and set-up, live updates during the event, as well as details of any changes in the

schedule, and hassle-free refunds.

This pillar works best in combination with personalization – understanding the particularities of the various attendees is essential for investing in the right capabilities.

For some festivals, there might be a need to invest in uplifting the digital solutions. Others might need to reconsider their on-the-ground operational flows.

Regardless, investments should be made considering the profile and needs of the particular attendee segments.



Expectations

Festivals are no longer just about the music, they are a meeting ground for excitement and connection.

The ability to understand, deliver and go above and beyond expectations is a key competence that few great organizations possess.

Festivalgoers have started to have higher expectations and perceive festivals as more than just parties where they could listen to their favorite artists or discover new ones.

Festivals are now opportunities to connect with

friends and socialize, to see and experience exciting things, to escape everyday hassles and relax, to explore new cultures or places (festival tourism, anyone?).

All of this while also getting good value for money, especially given the general economic context.

Most festivalgoers expect to have access to a diversity of foods and drinks but tend to compare prices with the “real world”, outside of the premises.

Those who have been going to the same festival for years still expect to be pleased by the performers, but also to have new options for eating and drinking. Knowing and understanding these

fluctuations in the set of expectations, while calibrating the brand initiative to manage the client’s needs accordingly are vital components in designing the right solutions and experiences.



Resolution

Managing the challenges and providing real-time solutions should be embedded in the festival experience.

Resolution expresses clear ownership of an issue and the necessary skills to see it through while also ensuring that accurate and consistent

information is available at the first point of contact.

Reacting promptly to issues raised by the customer and practicing timely recovery or problem solving is a strong suit, especially in a festival environment where many unpredictable situations can appear.

Striking the right balance between communication, setting up escalation channels and empowering people on the ground is key.

Festivalgoers expect clear and transparent communication over official channels (be it social media, an app or, if need be, the website), with festival organizers admitting and owning up to the challenges

faced during the event. But digital can only do so much, especially when faced with the realities of human interactions.

Therefore, the staff on the ground should have a “customer-centric” mentality and a “can do” attitude, showing willingness to support festivalgoers with their challenges.

There should be clear flows and escalation points that make it easy for each member of the staff to reach someone who can decide, if need be.



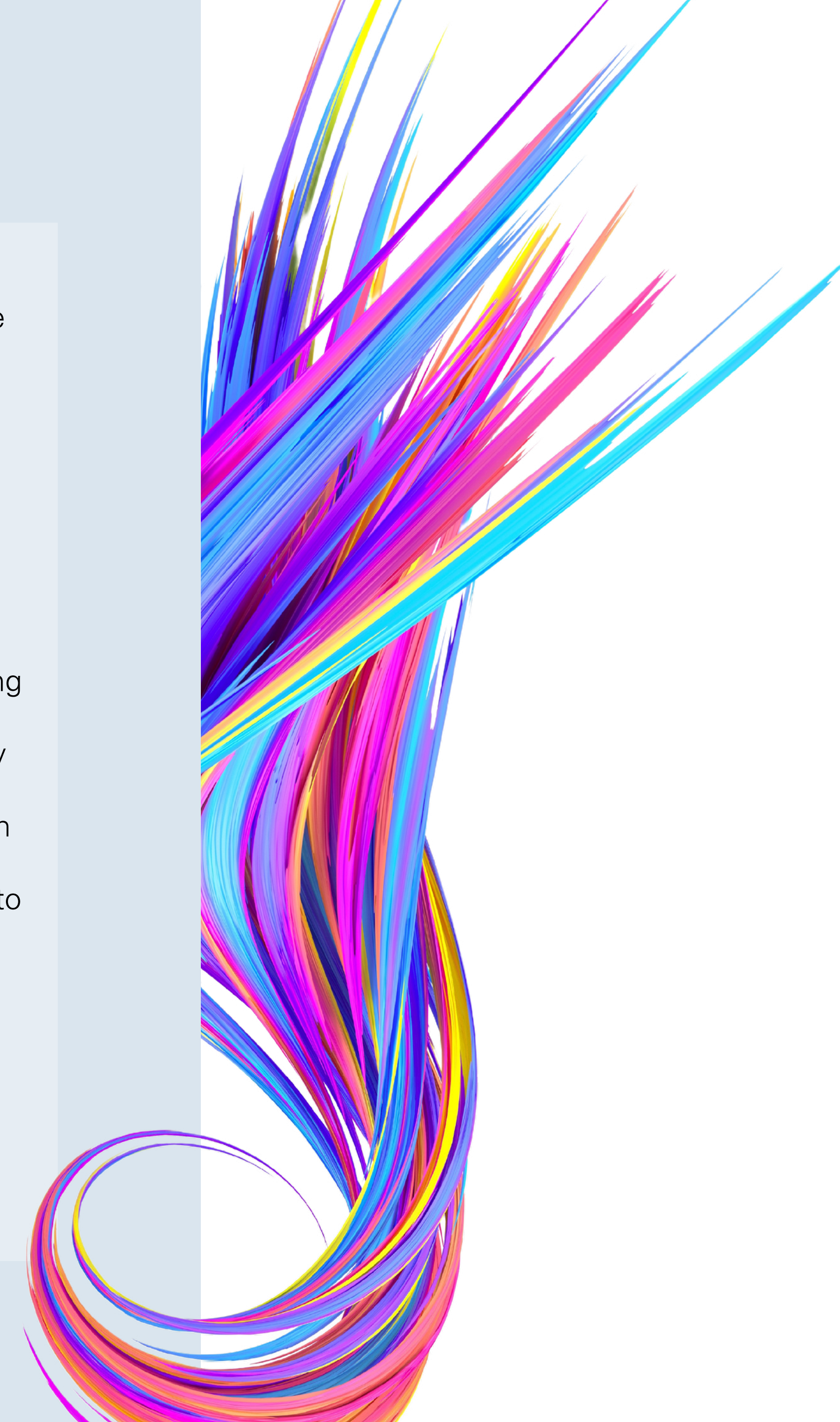
Walk the talk and find ways to stand for more than music

Integrity translates into a brand’s ability to build rapport at a basic human level and to focus on creating a great first impression to establish trust from the outset, while also living up to its brand promise.

This can also involve a brand’s capability to stand for something more than profit and to genuinely make contributions to and show interest in local/global communities. An effort should be made in terms of sustainability, as this is a topic

of interest in society at large and an extensive body of research is looking into the impact festivals have on the environment and local communities.

This can be translated into practices that go beyond recycling and into using renewable energy, integrating circular economy practices developed together with key stakeholders (e.g. partners and municipalities), and even discussing carbon off-set schemes for transportation to the festival.



Unveiling the insights: Getting acquainted with your attendees

As noted throughout the article, one size does not fit all, and it is important for each festival to truly understand its segments.

That means going beyond the socio- demographics and deep diving into festivalgoers' psychological aspects, looking at their needs and expectations, the reasons they attend festivals, as well as some of the challenges they are facing throughout the festival.

This granular understanding, going beyond numbers, helps organizers to build rapport and to design solutions, set-ups and tailored experiences, thus driving satisfaction and, implicitly, loyalty.

When trying to understand your customers, one instrument that comes in very helpful is the "persona".

A persona is a fictional character that represents a type of festivalgoer and is created based on a synthesis of what you've learned about

your real customers and the themes or common characteristics you have observed that many of them share.

This approach is research-based and designed to help organizers better understand their customers' needs, behaviors and expectations.

During our research we conducted interviews with a diverse set of individuals to better understand their motivations and priorities when it

comes to attending music festivals.

Based on the insights gathered, we created three different types of proto personas (high-level personas based on three to four in-depth interviews), which can offer high level insights into the variety of festivalgoers and their needs.



Maria is an HR manager who was persuaded by her friends to go to her first festival this year.

She didn't have any expectations, other than to have fun and get out of her comfort zone.

Feelings of security and planning are very important for her, so having a clear idea of the logistics in advance is crucial.

When considering whether to attend a festival, she's heavily influenced by her friends and the costs associated with the event.

Time & effort are crucial, as Maria expects her experience to be as seamless as possible.

Moreover, she wants the festival organizers to find satisfactory resolutions to any issues that may arise.



Maria

Popescu

Archetype

First Time Festival Goer

Age

30

Profession

HR manager

KPMG Customer Experience Pillars

Time & Effort | Resolution

Short bio

Maria is a highly skilled professional and she values work-life balance, as she enjoys spending time with her family and friends.

She is an active, receptive person and she values security greatly when she is in a new setting.

She highly values her time and is not willing to waste it on logistical issues that can be prevented.

Maria has the mindset of a continuous learner and appreciates quality interactions between people.

Her tendency to be a bit skeptical makes it challenging for her to step outside of her comfort zone, and her friends' opinions are important when she makes decisions.

Expectations

- A complete and memorable festival experience.
- Spacious and accessible location with excellent facilities (atmosphere, high quality food options, enough toilets, transportation and parking).
- Seamless digital experience (ticket purchase, top up, refund).

Frustrations

- Long queues, crowded festival areas and lack of clarity over logistical aspects.
- Disorganized transportation systems and parking facilities.
- Untrained staff with an unpleasant attitude.
- Ad-hoc changes to the line-up.

Needs

- A good time in the company of her friends.
- Clear logistical information on the official channels and on-site.
- Affordable options for food & beverages, accommodation and transportation to the festival.
- To know partially the festival's lineup.

Key aspects

- Price sensitivity ●●●●○
- Socializing ●●●●●
- Lineup significance ●●○○○
- Attractiveness of the venue & activities ●●●○○

This year I went to my first festival because my friends finally convinced me. I didn't have high expectations but surprisingly I enjoyed it. I will probably come back next year.

Vlad embodies the independent millennial who chooses to attend 2-3 music festivals each year. He hopes to have a memorable experience, have fun with his friends and sing along to his favorite musicians as they perform live.

Because he enjoys using social media, you can often find him taking photos in all the creative corners and exploring the best activities the festival has to offer.

Since he has previously participated in such events, he has certain expectations: a fully integrated digitized experience, straightforward communication, a well-thought-out setup and a variety of new activities to engage in.

Consequently, it's imperative for festival organizers to meet and exceed his expectations. He values digital interactions that are individualized and which cater to his age group and preferences.



Vlad

Marinescu

Archetype

Casual Festival Goer

Age

25

Profession

Web-developer

KPMG Customer Experience Pillars

Expectations | Personalization

Short bio

Vlad is a freelance web developer who is looking for experiences that have the potential to enrich his knowledge and life; that's why he enjoys going to music festivals 2 to 3 times per year.

He is opinionated at times and he is keen to spend a little time planning ahead for his activities. He likes the ones that bring him calmness and joy.

He has a growth mindset, and values quality over quantity when interacting with a brand.

He is an experience-driven individual who emphasizes practicality and efficiency in his everyday life. He values the excitement of tailored experiences.

Expectations

- To have fun and access unique experiences.
- Good WiFi infrastructure, multiple phone charging points and digitized venue processes.
- Effective, straightforward communication and campaigns available on various channels.
- A high-quality sound system.
- A good atmosphere and well-thought-out setup (parking, toilets, topup & refund points, security checks, medical team, fun and creative activities).

Frustrations

- Lack of fun activities and a low quality artist/band performance.
- Long queues and crowded festival areas.
- Long distance between stages and inconveniently located gates.
- Inconsistent and time wasting procedures

- Poor quality-price ratio in the food court area.

Needs

- To experience the festival's energy by engaging in entertaining activities.
- New musical discoveries and at least one favorite band/artist.
- Digitalization of the purchase, top-up and refund processes.
- Easy to access location and eco-friendly facilities.
- Transparent information via the festival's online channels.

Key aspects

- Price sensitivity ●●○○○
- Socializing ●●●○○
- Lineup significance ●●●○○
- Attractiveness of the venue & activities ●●●●●

I am keen to discover new artists and to experience the energy behind a festival together with my friends; that's why I go every year. I think twice before purchasing tickets because I want to make sure I fully resonate with what's happening there.

Sabina has attended the vast majority of festivals more than once, and she has no intention of stopping anytime soon.

It's challenging to impress her because she's seen it all, but her love of music drives her forward.

Outperforming her expectations is crucial because, given her vast experience, she has a critical eye over what a positive festival experience entails.

She places a great deal of importance on how the organizers communicate and handle challenging situations.

However, Sabina wants her needs to be understood and met, particularly when it comes to the sound system and the musical performances.



Sabina Marin

Archetype

Veteran Festival Goer

Age

38

Profession

Business marketer

KPMG Customer Experience Pillars

Expectations | Empathy

Short bio

Sabina is a creative and adaptable business marketing manager. She is always looking for the next outstanding experience and likes to learn from every interaction.

She is spontaneous and open-minded even though she has learned to be selective about which events she attends.

Music is her passion as she has a background in artistic contexts and she is familiar with events management; that's why she goes to 5 or more festivals every year. She is a confident and authentic individual as she is not afraid to express opinions and to offer solid arguments for what she believes in.

Among the festivals she attends each year, she has a favorite one and has not missed a single edition of it since it first started.

Expectations

- Quality of the music and of the sound system.
- Diversity of the performing artists and schedule compliance.
- Easy to access location, reasonable distance between stages and well-thought-out setup (parking, toilets, selling points, security proactivity).
- Cleanliness, civilized atmosphere and welcoming staff.
- Good value for money and a wide variety of food and beverages.

Frustrations

- Long queues and crowded stage areas.
- Unsuitable communication style both online & offline, in relation to logistical aspects.
- Limited transportation and accommodation options in the proximity of the festival.
- Lack of healthy food options, water refilling stations and insufficient phone charging spots.

- Lack of accessible storage spaces.

Needs

- Memorable shows, exciting lineup and multiple favorite artists present at the festival.
- To be surrounded by like-minded people and an overall enjoyable festival atmosphere.
- No violent or hazardous incidents.
- Traffic fluidization and proximity between key points of the festival.
- Queuing optimization process & supplementation of the food court spaces.

Key aspects

- Price sensitivity ●●○○○
- Socializing ●○○○○
- Lineup significance ●●●●●
- Attractiveness of the venue & activities ●●○○○

I have been to plenty of festivals and compared to previous editions, organizers could have done a better job of the management. Nonetheless, I still enjoyed the atmosphere and the whole experience. I would consider reattending if at least one of my favorite bands were performing.



The personas are based on the profiles of the interviewees and we are certain there is a myriad of other profiles to be explored and discovered.

Do keep in mind that the main goals of attendees are to actively participate in concerts with their friends and to have extraordinary experiences that have the power to stir positive emotions.

Still, these could be disturbed by a few factors that, if tackled at the right time, might help the organizers to stand out in a competitive and dynamic industry.

Let the summer magic unleash its vibes

**This summer is
teeming with
exciting
opportunities and
captivating
experiences
waiting to be
explored by us all.**

As we embark on our journey, one thing that has become increasingly evident is that organizers are deeply committed to perpetual improvement and constantly strive to create that unforgettable "wow" factor.

The set standards are exceptionally high and capturing the attention of festivalgoers involves demonstrating the immense value of what is being created and communicated.

We are witnessing a notable shift in the industry - a transition from simply crafting memorable experiences for the many to eliciting life-changing events for the one.



Experience is at the heart of this transition.

Looking beyond today, the phenomenon of festivalization holds immense potential to bring much more to the table for festivalgoers, organizers and local communities alike.

Festivals can be the driving force behind developing a comprehensive and creative regional strategy that fosters sustainable tourism and enables urban and rural development.

Festivalization, when implemented effectively, meaning by embracing innovation, forming connections, engaging with local

culture, and prioritizing sustainability, can serve as a catalyst for economic growth, community engagement, and cultural enrichment, whilst elevating attendees' summer adventures to new heights and even make lifetime-lasting memories.

By leveraging in-depth knowledge about the profile of festival goers, partners and local communities, determining the value drivers and the core elements that make or break the experience, organizers can transform festivals into key platforms for stimulating economic activity, leveraging

unique assets and supporting their preservation.

Festivals based on sustainable practices can support cities, and communities, enabling them to harness vibrant cultural ecosystems that benefit both residents and visitors alike while creating lasting positive impacts.

They can be a driving force for social cohesion and community development.



Unlock the Power of Transformative Business Experiences with KPMG's Six Pillars of Customer Experience! If you would like to discover how to expertly guide your next venture by integrating our proven methodologies, do not hesitate to connect with us at the KPMG Business Design Hub via businesshub@kpmg.com.

Our approach is backed by a constructivist qualitative research design, involving in-depth interviews with individuals who have attended at least one music festival within the past 12 months.

This ensures accurate experience recollection, memory formation, and the ability to integrate experiences into long-lasting transformative responses.

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