



John "Jack" Nifflor / The Museum at Bethel Woods via Reuters

MUSIC FESTIVALS

FOR THE FUTURE

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EXECUTIVE SUMMARY

Contemporary music festivals are known for their negative environmental impact—from food waste, single-use packaging, festival gear, and attendees leave-behinds after the weekend, large musical festivals generate almost 100 tons of solid waste each day. The aftermath of these events is notorious.

But, with careful planning, responsible sourcing, win-win partnerships, and creative and effective communication, major music festivals can not only reverse the material waste component of their environmental impact but also reverse a long history of bad perceptions and, in doing so, set the stage for long-term positive impact.

INTRODUCTION AND BACKGROUND:

SETTING THE STAGE

Late in the summer of 1969, more than 400,000 people journeyed to the rural town of Bethel, New York for “3 days of peace and music.”¹ Woodstock Music and Art Fair became the gold standard by which to measure modern music festivals. The event left its mark on rock and roll history and the minds and memories of those in attendance. But it also left another unintentional and more somber mark on the land. After three days of peace, love, and rock and roll, festival attendees vacated the site, leaving behind a sea of waste.²

According to Richard Gray in a 2019 BBC Culture article, “It seems astonishing that an event so steeped in the environmental movement at the time should leave an environmental scar that is still visible 50 years later.”³ Remnants of the three-day music festival can still be found in the soil.

Unfortunately, Woodstock set another, unintended, standard for music festivals in the area of waste creation and management—a rather low bar at that. The aftermath of modern festivals, like Coachella and Stagecoach, are very much reminiscent of their 1969 predecessor despite efforts by festival producers and managers



Bill Eppridge / The LIFE Picture Collection via Getty

1 Skolnick, A. (1969). *Woodstock Music and Art Fair [Lithograph Poster]*. Library of Congress, Posters: Artist Posters. <https://www.loc.gov/pictures/item/97504956/>.

2 Nifflot, John. “Attendees Mill about the Grounds of the Woodstock Music & Art Fair.” *The Atlantic*, Bethel, New York, 14 Aug. 2019, www.theatlantic.com/photo/2019/08/woodstock-50-photos-1969/596107/.

3 Gray, R. (2019, June 29). *The people fighting the war on waste at music festivals*. BBC Culture. <https://www.bbc.com/culture/article/20190627-the-people-fighting-the-war-on-waste-at-music-festivals>.

to mitigate waste. Contemporary festivals are notorious for overflowing garbage cans and fields of left-behind tents, coolers, cups, wrappers, and clothing. “Major music festivals like Coachella (250,000 attendees over two weekends) generate an average [of] 106 tons (212,000 lbs) of waste per day [...] For context, the average American produces about one ton of trash per year.”¹ That math works out to be 5.1 pounds of trash per person. That is a lot of trash.

We acknowledge that packing and material waste is just one of the many offenders. Large music festivals have environmental impacts that reach well beyond trash creation and extend into the realms of energy consumption, travel emissions, audio pollution, water consumption, and bio waste, to name a few. Yet for this paper, we will focus on packaging and material waste, layout the case (return on investment) for reform, and provide solutions to festival producers and promoters for reducing overall material waste and recommendations for redirection waste from the landfill through recycling, upcycling, and reclamation. Through proper planning, responsible sourcing, and sustainable partnerships, major festivals can reverse the material waste component of their environmental impact and help set the stage for long-term positive impact in the festival industry.

SITUATION ANALYSIS:

THE TIME IS NOW.

2019 and 2020 were particularly challenging years for everyone, including major festival producers. Across the nation social gatherings were limited—in some states, Oregon for example, gatherings were limited to as few as ten people, and all major music festivals were forced to either cancel or adapt to online venues. Despite the many frustrations and impacts of the past year, we found a silver lining: the 2019 and 2020 festival seasons produced very little material waste. In fact, it was a back-to-back 50-year record low.

And now festivals are in a unique position. Coming off of two record low waste seasons, major music festivals should seize the opportunity to aim for a third by reforming the way they approach material waste and redefine the industry. The time is now.

As they anticipate a grand return in the 2021 and 2022 seasons, music festivals

¹ Baker, B. (2019, November 4). *How Music Festivals are Destroying the Earth [Opinion]*. EDM.Com - The Latest Electronic Dance Music News, Reviews & Artists. <https://edm.com/opinion/environmental-impact-festivals>.

worldwide are positioned to have their best year yet. According to a 2019 Statista Market Forecast¹, “The Music Events segment generates the highest revenues in the Event Ticket market, as it includes the lucrative sales for all music-related events.”

- “The Music Events segment is expected to show a revenue growth of 30.2% in 2022. In global comparison, most revenue will be generated in the United States (US\$8,310m in 2021).”
- “Revenue in the Music Events segment is projected to reach US\$8,310m in 2021”
- “Revenue is expected to show an annual growth rate (CAGR 2021-2024) of 14.79%, resulting in a projected market volume of US\$12,570m by 2024.”
- “With the rise of music streaming services for artists concerts have become their main source of income.”
- “As tickets are becoming more expensive, so are the costs of hosting a concert.”
- “[Yet] customers are still willing to pay more, as growing user numbers indicate.”

¹ Statista. (2019). *Music Events - United States*. <https://www.statista.com/outlook/dmo/eservices/event-tickets/music-events/united-states>

MARKET POSITIONING:

A LOOK AT THE MUSIC FESTIVAL TARGET MARKET AND THEIR VALUES

Major music festivals have always appealed most to young adults. According to Statista in their most recent report in January of 2021, in Europe, “Almost seventy percent of festival-goers in 2016 were aged between 18 and 30 years of age.”¹ While in the US, festival-goers tend to be a bit older. According to a 2019 audience targeting report published by research firm, YouGovAmerica, “More individuals between the ages of 30 to 44 said they were regular or occasional festival-goers than any other age bracket. People 44 to 65 weren’t far behind, and young people lagged both groups.”² In addition to attending more regularly, the millennials are willing to spend more at each event.

Across the markets and the ages (history-wise), music festivals’ largest demographic audience are people ages 18 to 44—Gen Z and Millennials.

KEY VALUES:

- “For the most part, [...] Gen Zers and Millennials share similar views on issues facing the country. These younger generations are more likely than their older counterparts to say the earth is getting warmer due to human activity: 54% of Gen Z and 56% of Millennials say this, compared with smaller shares of Gen Xers, Boomers and Silents (48%, 45% and 38%, respectively).³
- “Gen Zers value individual expression and avoid labels. They mobilize themselves for a variety of causes. They believe profoundly in the efficacy of dialogue to solve conflicts and improve the world. Finally, they make decisions and relate to institutions in a highly analytical and pragmatic way.”⁴

1 Statista. (2021, January 8). *Music festivals: age distribution of visitors in Europe 2016*. <https://www.statista.com/statistics/438157/https://www.statista.com/statistics/438157/age-distribution-of-festival-goers-in-europe/>.

2 Marzilli, T. (2019, July 1). *Why Music Festivals aren't for young people*. YouGovAmerica. <https://today.yougov.com/topics/lifestyle/articles-reports/2019/07/01/why-music-festivals-arent-young-people>





3 Parker, K., & Igielnik, R. (2020, May 30). *On the Cusp of Adulthood and Facing an Uncertain Future: What We Know About Gen Z So Far*. Pew Research Center’s Social & Demographic Trends Project. <https://www.pewresearch.org/social-trends/2020/05/14/on-the-cusp-of-adulthood-and-facing-an-uncertain-future-what-we-know-about-gen-z-so-far-2/>

4 Francis, T., & Hoefel, F. (2020, December 16). *‘True Gen’: Generation Z and its implications for companies*. McKinsey & Company. <https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/>

- “Companies should be attuned to three implications for this generation: consumption as access rather than possession, consumption as an expression of individual identity, and consumption as a matter of ethical concern.”¹
- “The core of Gen Z is the idea of manifesting individual identity. Consumption therefore becomes a means of self-expression.”²

Soon Gen Z, the largest generation, will surpass millennial purchasing power, and when they do festivals need to be ready. And they should start now by reforming current practices and realigning values to match those of the “True Gen.” Adapt now or pay later.

Today’s young people differ from yesterday’s.

				
	Baby boomer 1940–59	Gen X 1960–79	Gen Y (millennial) 1980–94	Gen Z 1995–2010
Context	<ul style="list-style-type: none"> • Postwar • Dictatorship and repression in Brazil 	<ul style="list-style-type: none"> • Political transition • Capitalism and meritocracy dominate 	<ul style="list-style-type: none"> • Globalization • Economic stability • Emergence of internet 	<ul style="list-style-type: none"> • Mobility and multiple realities • Social networks • Digital natives
Behavior	<ul style="list-style-type: none"> • Idealism • Revolutionary • Collectivist 	<ul style="list-style-type: none"> • Materialistic • Competitive • Individualistic 	<ul style="list-style-type: none"> • Globalist • Questioning • Oriented to self 	<ul style="list-style-type: none"> • Undefined ID • “Communaholic” • “Dialoguer” • Realistic
Consumption	<ul style="list-style-type: none"> • Ideology • Vinyl and movies 	<ul style="list-style-type: none"> • Status • Brands and cars • Luxury articles 	<ul style="list-style-type: none"> • Experience • Festivals and travel • Flagships 	<ul style="list-style-type: none"> • Uniqueness • Unlimited • Ethical

McKinsey&Company

1, 2 Francis, T., & Hoefel, F. (2020, December 16). *‘True Gen’: Generation Z and its implications for companies.* McKinsey & Company. <https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/>

RECOMMENDATIONS AND RESOURCES

A late start to the festival season this year (and even into 2022) is a valuable time for festivals to start planning how to be more aware of the waste they produce and, more importantly, how to start reducing overall waste. In the United States, 32 million people attend at least one music festival a year, spanning all genres of music.¹ From food waste, single-use packaging, festival gear, and attendees leave-behinds after the weekend large music festivals such as Coachella and Stagecoach generate almost 100 tons of solid waste each day.² That means that a music festival such as Coachella, which is held over the course of two weekends, will generate approximately 600 tons of waste.

FOOD AND BEVERAGE:

At festivals, food and beverage vendors try to get as much food out to attendees as fast as possible. It's good for their businesses and it keeps event attendees happy, however, this often means that meals and drinks are served in single-use plastic containers. In California, where three major festivals are held, less than 15 percent of single-use plastic is recycled.³ Requiring vendors to eliminate single-use plastic with compostable single-use plastic or other sustainable alternatives would significantly reduce waste. Encouraging attendees to bring their own water bottles and utensils and providing fill-up stations for water bottles and washing stations for utensils is another great way to cut down single-use plastic at festivals. Coachella provides over 40 water refill stations for attendees and substitutes plastic with aluminum packaging for all beverages. "The switch will eliminate well-over 2MM single-use plastic bottles."⁴ A shift to sustainable alternatives in the food and beverage sector of music festivals will reduce the overall impact of hosting a large multi-weekend festival for those who plan them as well as for the cities in which the festivals are held.

1 Deployed Resources. (2018, June 13). *The Rising Trends of Music Festivals in the U.S.* <https://www.deployedresources.com/blog/special-events/the-rising-trends-of-music-festivals-in-the-u-s/#:~:text=According%20to%20Billboard%20online%2C%20in,of%20passage%E2%80%9D%20among%20today's%20youth.>

2 City of Indo. (2016, March). *Addendum to the Final Environmental Impact Report for the Music Festival Plans.* [https://www.laquintaca.gov/home/showdocument?id=29302.](https://www.laquintaca.gov/home/showdocument?id=29302)

3 Rhee, Foon. (2019, April 18). *Is Recycling Still Worth it?* <https://www.cawrecycles.org/recycling-news#:~:text=In%20California%2C%20less%20than%202015,restrict%20plastic%20straws%20at%20restaurants.>

4 Coachella. (2021). *Sustainability.* <https://coachella.com/sustainability>

MERCHANDISE:

For a long time, T-shirts and programs were the most purchased items at concerts in terms of memorabilia. Recently bands and musicians have been looking for alternative, more environmentally-friendly merchandise. T-shirts, fanny packs, and other merchandise are usually printed well in advance of live shows, which means that those in charge of merchandise have to make assumptions for how much product will be sold throughout a festival weekend or a concert tour. In 2019, instead of printing new shirts for their tour, the band The 1975, printed over old t-shirts they had in stock with their updated look for the tour. This meant that fans had a chance to get older merchandise that was only sold by resellers. The artist also encouraged attendees to bring other band t-shirts to get reprinted for free.¹ Festivals could encourage guests to bring their old festival or artist/band t-shirts and offer attendees a reduced rate for repurposing their previous t-shirts. This would help to reduce the potential risk for overproduction of merchandise and encourages the repurposing of old clothes.

1 https://www.instagram.com/p/B1Rm2qXB89l/?utm_source=ig_embed&ig_rid=64b39f91-58c4-49d8-8c8b-acd9854921ff



Recycling partnership with Trashed / Coachella.com

GETTING STARTED

Start by reducing overall waste and improving deliverables/strategic partnerships

- Eliminate distribution of on-site single-use plastic
- Replace all single-use utensils with long-lasting alternatives
- Search out compostable single-use alternatives for food and beverage containers paired with composting plan and effective education and communication strategy
- Consider recyclable/aluminum alternatives to single use containers. Aluminum is relatively easy to recycle and widely accepted.
- Partner with/require event suppliers to ensure sustainable alternatives are used

RECOMMENDATIONS CONT.

- Encourage BYO water bottle and set up free refill water stations
- Reduce paper ticket options, encourage digital tickets/passes
- Seek out wristband and lanyard sustainable alternatives
- Partner with sustainable brands for merchandise alternatives

Build action plans and strategies to reduce/mitigate on-site waste

- Level-up waste collection and diversion. Seek out ways to educate and more effectively encourage people to dispose of waste properly. Consider clear signage and on-site education delivered in an on-brand, creative, playful tone.

Search out local partners to assist in the efforts

- Partner with local social service programs to donate unclaimed lost and found items
- Donate food scraps and compost to community gardens and/or local farms
- Donate can recycling to local causes

Toot your own horn regarding plans, set and communicate the standard early and effectively

- Reward buy-in with incentives (BYO discounts on food—discounted tickets, discounted food and drinks)
- Art competitions to decorate recycle and trash