

Roskilde Festival

Potential analysis, November 2018



WONDERFUL
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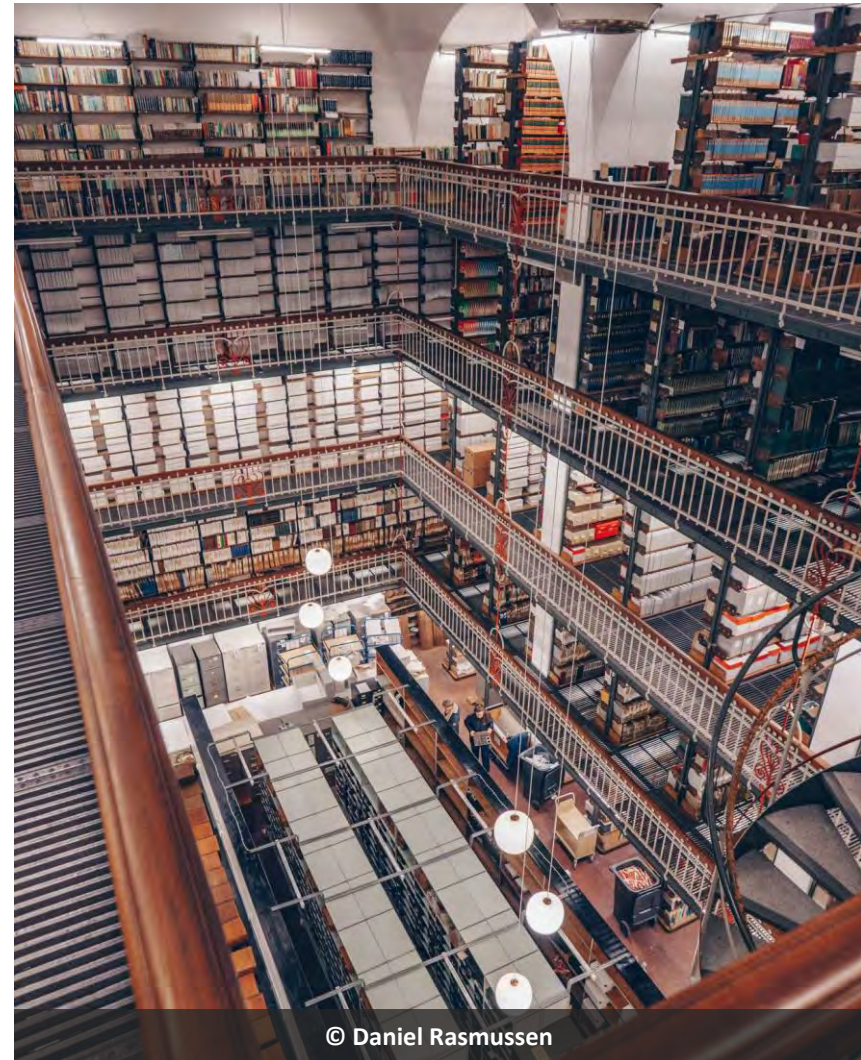
Reader's guide

This report is built around a certain way of reading the report. The first few sections of the report focus on introducing the study and summarizing the main findings, while the later sections go more in-depth with each area of the study.

The first sections of the report contain:

- ✓ An introduction, which covers the objective, methodology and limitations of the study
- ✓ A key findings section, highlighting the main take-aways from the report
- ✓ One section for each of three highlighted segments that were chosen as potential target groups for Roskilde Festival's 2019 marketing campaign, based on various attributes including their likelihood to participate in international music festivals
 - Each of these sections also contain specific suggestions for possible communication strategies to target each group

The following sections present each of the topics included in the survey, such as brand awareness for music festivals, separately with a specific focus on highlighting differences between individual markets and, when relevant, age/gender groups. This is done to allow you, the reader, to create custom segments based on the differences between markets in each section of the report, rather than simply being limited to the three segments suggested at the beginning of the report.



Introduction, methodology and limitations

This report is about the 2018 potential analysis conducted by Wonderful Copenhagen for Roskilde Festival. The objective of the survey was to analyse which European markets that has the highest potential in terms of attracting international festival participants to the Danish music festival.

While this survey was created to find insights useful for the specific situation that Roskilde Festival was in, in terms of relevant marketing content/themes, activities etc. this report is meant to be useable for all events in Denmark. For events with similar content to Roskilde Festival, some of the results presented in this report will be directly useable in your current event work, while for other events that focus on other types of content, this report and survey design can serve as inspiration for how to conduct a potential analysis amongst potential international participants in your event.

Objective

The objective of this analysis was, as stated above, to find out which European markets that the Roskilde Festival should focus their marketing activities on, in an attempt to attract more international participants to the festival. The main determinants of potential in this analysis was the respondents' experience with participating in festivals previously as well as their intention to participate in festivals in the future, measured by their current plans to attend music festivals within the next year. This potential is further divided by whether these previous and future music festival experiences were/are located in the respondents' home country or a foreign country.

Furthermore, Roskilde Festival has certain themes that are very important to the event, such as social and environmental

sustainability, equality and food. These will also factor into the potential for the markets, given that a low current intent to travel to foreign music festivals might be outweighed by a very high interest in the above themes. That is, someone who regularly attends domestic music festivals could possibly be encouraged to travel to a foreign music festival, if that music festival resonates with the personal values of the respondents (such as a focus on social sustainability).

Methodology

Data was collected amongst 9 of the most popular tourist markets in the Capital Region of Denmark, excluding overseas markets, such as the United States of America. These markets were chosen because they have already shown a proven potential for visiting the Capital Region of Denmark, which means that determining their potential as music festival participants is primarily based on their experience with participating in national and international music festivals in the past as well as their current intentions to participate in music festival within the next year, both in and outside of their own country.

Some of the topics analysed in this report are of a more abstract nature. For instance, this analysis looks to measure the respondents' overall opinion of, and devotion to, environmental sustainability. As this is a very wide topic, a series of Likert scale questions were designed to measure different aspects of the respondents' opinion of, and devotion to, environmental sustainability. These were then combined using factor analysis to create one combined measure that can be used to classify the respondents opinion of, and devotion to, environmental sustainability. Similar techniques were used for other parts of the dataset and, as such, any given results might not correspond to a single question.

Data collection

Data was collected from the following 9 markets, using an online survey:

- ✓ Finland, France, Germany, Italy, The Netherlands, Norway, Spain, Sweden and The United Kingdom.

Answers from 500 respondents was collected from each of the following markets: **Finland, France, Germany, The Netherlands and The United Kingdom**, while answers from 250 respondents was collected from the markets: **Italy, Norway, Spain and Sweden**. Respondents were pre-screened to ensure that only respondents who had previously participated in a music festival or were planning to participate in one within the next year, filled out the survey.

Less respondents were collected from the latter four markets in order to maximize the number of markets that could be included in the study. Previous experience has shown that these markets (Italy & Spain and Norway & Sweden) tend to be very similar in terms of travel preferences and behaviour, which was also assumed to be the case for this study. In cases where a subgroup of respondents from a given country is analysed these markets has been combined, if there is not enough respondents from each individual markets to generalize the results (<100 respondents). In all other cases, these markets will be kept separate, since there are enough respondents from each market to analyse them as a separate group in most cases. In cases were two markets have been combined, a pre-analysis has been completed to confirm the assumption that the two markets were not significantly different. Results for combined markets are only shown if the two markets were not significantly different from each other in terms of the variable in question, e.g. brand awareness.

In the end, answers from 3,852 respondents were collected. 105 of these were disqualified due to signs of systematic completion of the

questionnaire, resulting in a total of 3,747 successfully completed questionnaires. This number is slightly higher than the planned 3,500 respondents because oversampling was necessary to ensure at least 3,500 respondents after removing invalid respondents from the final dataset.

Limitations

The limitations for these results are somewhat minor. The data was collected from demographically representative panels in 9 chosen markets, which means that the results should only be expected to be representative of respondents in these markets:

Finland, France, Germany, Italy, The Netherlands, Norway, Spain, Sweden and The United Kingdom.

Furthermore, only respondents who had previously participated in a music festival or had intentions of participating in a music festival within the next year, were interviewed. As such, these results are not representative of the general population in the selected country, but rather the subgroup of the population who show an active interest in participating in music festivals.

Key findings

This section of the report highlights the most interesting and useful findings from the analysis.

9/10 respondents have previously participated in a music festival

91% of the respondents said that they have previously participated in a music festival. For 69% of these respondents, the last time they participated in a music festival was within the last 3-4 years (between 2015 and 2018), indicating that most respondents participated in a music festival fairly recently and, as such, are presumably likely to be attractable to Roskilde Festival 2019.

These respondents had participated in an average of 2.2 domestic music festival and 0.4 foreign music festival, in their lifetime.

7/10 respondents were planning to participate in a music festival within the next year

67% of the respondents were planning to participate in a music festival within the next year. 34% of these were specifically planning to participate in foreign music festivals, taking place outside of their home country.

In total 59% of the respondents had participated in a music festival previously and were planning to participate in another music festival within the next year, which indicates that this analysis has a good mix between previous experience and future intent.

Come for the music, stay for the socializing

The highest rated motivation for attending music festival, by quite a significant margin, was the artists performing at the music festival, but the second highest rated motivation was to socialize with friends and

family. The third highest rated motivation was to meet new people, albeit by a significantly lower margin than the first two motivations.

Significant interest in additional topics

While the main motivation for participating in music festivals was the music itself, respondents also showed interest in a number of other topics, of which, the top five were:

- ✓ Food/Cooking (chosen by 48%)
- ✓ Movies/Documentaries (chosen by 40%)
- ✓ Technology and innovation (chosen by 31%)
- ✓ Sports (chosen by 28%)
- ✓ Art (chosen by 28%)

Roskilde Festival already incorporates both food and art in their event by having a wide selection of quality food options at the festival, some of which are very exotic (like bugs), as well as having art exhibits all around the festival area that often present a message about the surrounding society, such as the need for a focus on environmental sustainability.

Roskilde Festival could add technology and innovation by incorporating more technology into these displays, which could, for instance, be done by creating lighting shows throughout the festival at night. This is something that Frost Festival does on a yearly basis in Copenhagen, which could be an opportunity for collaboration between the two festivals.

More than 60% travel abroad once a year

This means that Roskilde Festival has the potential to attract more than half of the respondents for each yearly festival. Furthermore, more than 30% of respondents from Norway, Finland, Sweden, Germany and the Netherlands travel abroad two or more times a year. 16% of respondents from Norway and Germany both travel abroad two or more times a year and have either previously participated in a music festival abroad or plans to do so in the future, making them two high potential markets for attracting international participants to Roskilde Festival.

Less than half of respondents have visited Denmark before

While more than 84% of respondents from Norway and Sweden have been to Denmark before, less than 45% of respondents from all other markets have been to the country. Of these other markets, 5 have less than 26% of respondents who have been to Denmark before. This is, to an extent, correlated with the distance from Denmark to the given country, however, only 16% of respondents from Great Britain have, for instance, visited Denmark.

This opens up a few options in terms of marketing Roskilde Festival. For Swedish and Norwegian respondents, Roskilde could advertise the familiar experience of being in Denmark with the exciting new experience of participating in the festival. For the other markets, there is a potential to advertise Roskilde Festival as part of a larger experience, which involves exploring the country of Denmark. This could be especially prudent when it comes to respondents who only travel abroad once a year, to make them feel like they are going on a more traditional holiday with the added experience of participating in Roskilde Festival. This could be extended into an official co-operation between Roskilde Festival and incoming bureaus to advertise official package trips for music enthusiasts.

Roskilde Festival has the highest brand awareness

Comparing Roskilde Festival's brand awareness to 26 other music festivals in Europe showed that Roskilde Festival's brand awareness is higher than that of any of the other music festivals. This is primarily driven by high brand awareness levels in the geographically close by markets, but none the less means that Roskilde Festival is a step ahead of many other European music festivals. Rather than having to first build up brand awareness, Roskilde Festival simply needs to find a way to activate the already existing brand awareness.

Some of the reasons for the high un-activated brand awareness is the costs involved in travelling to, and staying in Denmark in order to participate in Roskilde Festival, which can potentially be remedied through increased incentives for international participants to be volunteers at the festival.

Other reasons include a lack of information and inability to go on holiday during the days where Roskilde Festival takes place. The lack of information could potentially be remedied by an increased presence online, including on social media, which is a popular source of information amongst respondents. The inability to go on holiday during the days where Roskilde Festival takes place could potentially be remedied by offering early-bird discounts to international participants, thereby incentivizing them to plan their trip to Denmark before they make other plans during the same period, which is during the month of July where many people go on summer holiday.

Previous participants in Roskilde Festival are music festival veterans, who have, on average, participated in 4.6 music festivals previously and have knowledge of 13.8 different music festivals around Europe. This means that another way of targeting highly potential international participants would be to specifically target consumers with a high engagement rate for music-related content on social media, which is a popular source of information for the respondents. In fact, 68% of respondents usually use one of the traditional social medias (Twitter, Facebook, Instagram and YouTube) to look for information about music festivals.

7/10 young respondents would consider volunteering for a festival

68% of the respondents aged 18-25 said that they would consider volunteering to work at a festival in the future. This percentage drops as respondents get older, as 55% of respondents aged 26-35 would consider volunteering and for respondents aged 35+ the percentage drops below 50%.

The most important aspects to get respondents to volunteer include:

- ✓ A free ticket to the festival
- ✓ The topic of the festival
- ✓ Free accommodation at or near the festival
- ✓ Free food and drinks

The topic of the festival relates partially to the genres of music being played at the festival and partially to the topics of the other activities at the festival, such as art or technology.

Free accommodation could simply be in a tent on the festival grounds, while free food and drinks could be handled through a ticket system, giving volunteers access to a certain amount of food and drinks per day, in return for working during specific times/days of the festival.

Environmental sustainability is top-of-mind for close to half of respondents

47% of respondents agreed that they often think about environmental sustainability and that they find it frustrating when other people or companies do not care about environmental sustainability. These respondents also agreed that they often encourage others to care more about environmental sustainability.

This fits right into Roskilde Festivals recent themes of sustainability and could be a potential motivation to help convince potential participants to attend Roskilde Festival in the future.

4/10 respondents have social sustainability in their top-of-mind

43% of respondents agreed that they often think about social sustainability and that it is important that music festivals that they participate in actively work on improving social sustainability both within the festival itself, but also in the surrounding society.

This matches well with Roskilde Festival's ongoing theme of putting more emphasis on social sustainability and equality through, amongst other things, the art exhibitions on the festival grounds and the talks held during the festival.

Target audiences

This section contains a set of three target audiences selected due to one or more attractive characteristics, such as their willingness to volunteer at international music festivals abroad or knowledge of many European music festivals.

First, each of the target audiences are presented along with an explanation of why they have been chosen, which criteria was used to select them, how the target audience is intended to be used as well as information about their demographic composition and festival/travel habits and preferences.

Following the descriptions of the target audiences is a description of previous participants in Roskilde Festival, to allow for comparison between previous and potential participants.

Last is a list of suggestions on how the findings in this analysis can be used to create a future marketing strategy for Roskilde Festival. These strategic suggestions are based on the findings in this report along with internal discussions between stakeholders in Wonderful Copenhagen's Development and Communications departments, in order to get varied perspectives on the use of the analysis' findings.

All of these sections have been written to create an example of, and suggestion for, how the results of this analysis can be used in the real world. The specified target audiences are, however, by no means the only ones that can be found within the results of this analysis, which is why the majority of the results in this report (presented in the in-depth analysis section) have been split into differences between markets. This allows for the creation of other target audiences, besides the ones already specified.



Target audience 1: The festival veterans

Target audience selection criteria

This section presents the first selected target audience of the report. This target audience consists of “the festival veterans”, who:

- ✓ **Have participated in a minimum of 2 music festivals previously**
- ✓ **Have knowledge of at least 5 different music festivals in Europe**
- ✓ **Plan to participate in a music festival within the next year**

This target audience was chosen because the findings of this report shows that previous participants in Roskilde Festival, on average, have knowledge of more European music festivals than the average respondents and they have, on average, participated in more music festivals than the average respondent.

The average previous participant in Roskilde Festival had knowledge of 13.6 different music festivals out of the 27 included in the questionnaire and had participated in an average of 4.6 music festivals. The measure for how many music festivals that respondents had previously participated in was not limited to the 27 music festivals included in this survey, because this list of 27 music festivals was not fully inclusive of all the popular music Festivals in the world and limiting this measurement to the select 27 music festivals would, therefore, have led to a biased result.

The reason why the requirements for inclusion in this target audience was set lower, at knowledge of at least 5 different music festivals as well as participation in a minimum of 2 festivals, was to ensure that the size of the final segment was large enough to feasibly use in a marketing campaign by Roskilde Festival. That is, the final target

audience needs to be large enough for Roskilde Festival to have a realistic chance of reaching these potential future participants through marketing activities. The smaller the target audience for a given marketing campaign is, the more difficult it will be to reach them with marketing messages and the higher the costs associated with the marketing campaign will be.

Lastly, a requirement was added that respondents in this target audience had to be interested in participating in more music festivals in the future, in order to increase the likelihood that potential participants reached through a marketing campaign would actually be interested in participating in more music festivals in the future.

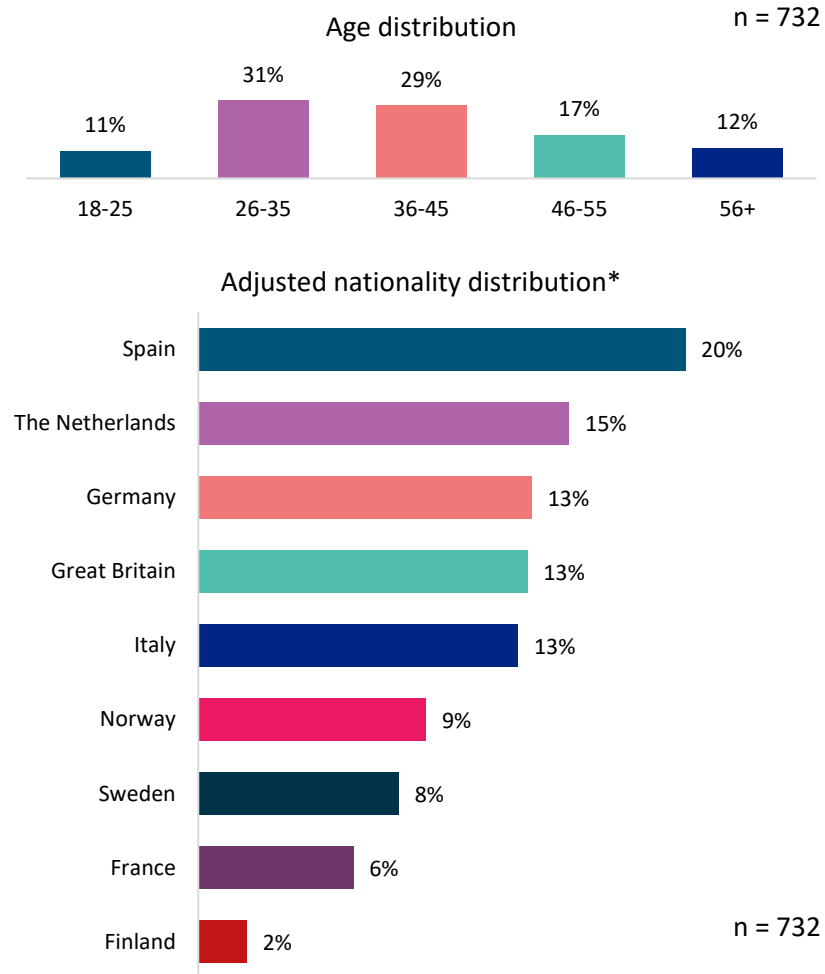
The following questions were used to implement the criteria for the selection of this target audience:

- ✓ **“How many music festivals have you participated in during the last 5 years.”**
- ✓ **“Please indicate which of the following music festival you have heard about and which you have attended.”**
- ✓ **“Are you planning to attend any music festivals within the next year?”**

The information included in this section is meant to be combined with the section on page 19 regarding suggestions for implementing the findings from this analysis in a marketing strategy. This section provides information specifically about the target audience, including demographic information, interests and most used information sources, while the section on page 19 provides broader insights from the entire analysis along with a discussion of how these findings can be used strategically.

Analysing “the festival veterans”

This target audience consists of roughly 20% of the respondents, who are in the age group 26-55 years primarily from Spain, The Netherlands, Germany, Great Britain and Italy:



*The nationality distribution was weighted to represent an equal sample size from each market.

Fact sheet

- ✓ 58% of the respondents plan to participate in a music festival outside of their home country within the next year
- ✓ Their brand awareness for Roskilde Festival is at 67%
 - 20% have previously participated in Roskilde Festival
 - 47% know about Roskilde Festival, but have not yet participated in the festival
- ✓ The main reasons why they have not yet participated are that:
 - Flight and accommodation costs are too high (42%)
 - Denmark is too far away (39%)
 - Not having anyone to go with (35%)
 - The festival ticket is too expensive (29%)
 - Unable to go on holiday during the days of the Roskilde Festival (27%)
- ✓ Their 3 most liked music genres are pop (68%), rock (66%) and electronic music (37%)
- ✓ The usually find information about music festivals through:
 - The festival’s own website (68%)
 - The festival’s own social media profiles (51%)
 - Facebook (51%)
 - YouTube (35%)
 - Google or other search engines (31%)
 - Friends/Family (28%)

- ✓ Travel frequency
 - 42% travel abroad once a year
 - 41% travel abroad twice or more a year
- ✓ 46% have been to Denmark before
- ✓ These respondents have a high degree of interest in other topics as well:
 - 54% are interested in food/cooking
 - 46% are interested in movies/documentaries
 - 42% are interested in technology and innovation
 - 40% are interested in sport
 - 34% are interested in art
 - 30% are interested in environmental sustainability



Target audience 2: The international volunteers

Target audience selection criteria

This section presents the second selected target audience of the report – “the International volunteers”. All respondents in this target audience:

- ✓ Would consider volunteering to work at a festival in the future
- ✓ Have either participated in an international music festival previously or plan to participate in an international music festival within the next year

This target audience was chosen partially because Roskilde Festival has shown interest in attracting more international volunteers to work at the festival, while receiving a free ticket in return and partially because 50% of respondents said that they would consider volunteering in the future. 36% have not volunteered to work at a festival before and, as such, might be harder to attract to a music festival outside their home country to volunteer for the first time, but 14% have previously volunteered at a festival before and, as such, might be more willing to try volunteering in a country abroad.

Because some first-time volunteers might be hesitant to volunteer at a music festival abroad the first time that they decide to volunteer, an additional criterion was chosen for this target audience: Every respondent in this target audience were required to have participated in an international music festival abroad previously or be planning to do so within the next year. By using this criterion, it ensures that respondents either had previous experience with music festivals outside of their home country or that they were simply prepared to travel to another country to participate in a music festival. This increases the likelihood that they would consider volunteering at

Roskilde Festival, if they were to receive information/marketing material about this opportunity.

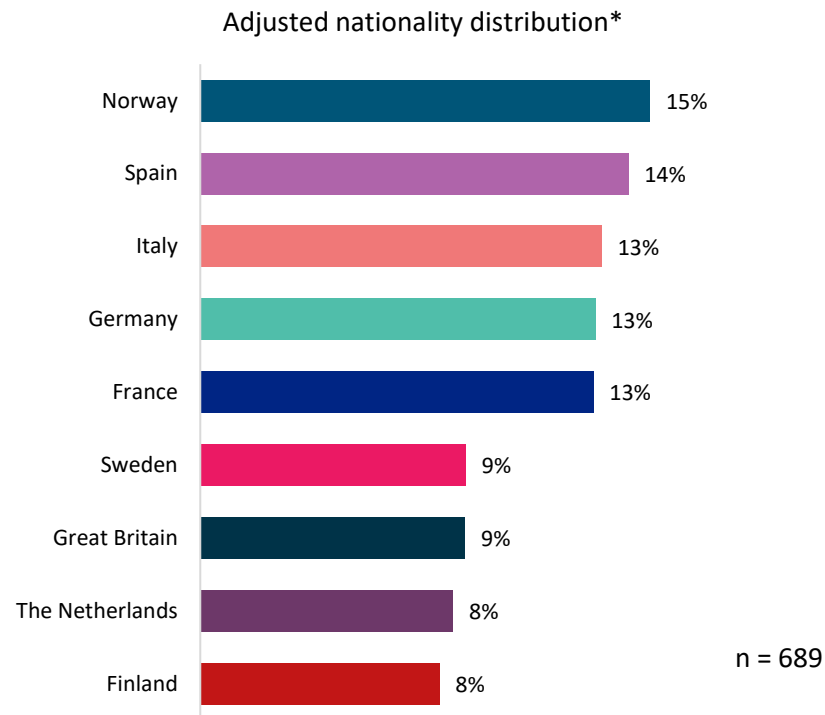
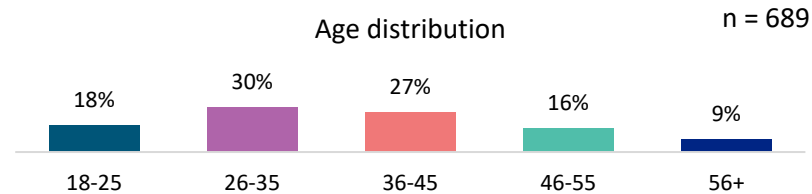
The following questions were used to implement the criteria for the selection of this target audience:

- ✓ **“Would you ever consider volunteering to work at a festival (again)?”**
- ✓ **“How many music festivals have you participated in during the last 5 years?”**
- ✓ **“Do any of the music festivals that you plan to attend take place outside of [insert respondents home country]?”**

The information included in this section is meant to be combined with the section on page 19 about suggestions for implementing the findings from this analysis in a marketing strategy. This section provides information specifically about the target audience, including demographic information, interests and most used information sources, while the section on page 19 provides broader insights from the entire analysis along with a discussion of how these findings can be used strategically.

Analysing “the Volunteers”

This target audience consists of 18% of the respondents, who are primarily in the age group 26-45 and live in a wide variety of countries, albeit the largest percentages live in Norway, Spain, Italy, Germany and France:



*The nationality distribution was weighted to represent an equal sample size from each market.

Fact sheet

- ✓ 80% of the respondents plan to participate in a music festival outside of their home country within the next year
- ✓ Their brand awareness for Roskilde Festival is at 62%
 - 17% have previously participated in Roskilde Festival
 - 45% know about Roskilde Festival, but have not yet participated in the festival
- ✓ The main reasons why they have not yet participated are that:
 - Flight and accommodation costs are too high (37%)
 - Not having anyone to go with (35%)
 - The festival ticket is too expensive (31%)
 - Denmark is too far away (31%)
 - Unable to go on holiday during the days of the Roskilde Festival (29%)
- ✓ Their 3 most liked music genres are pop (62%), rock (61%) and electronic music (41%)
- ✓ The usually find information about music festivals through:
 - The festival’s own website (69%)
 - The festival’s own social media profiles (54%)
 - Facebook (52%)
 - YouTube (38%)
 - Friends/Family (32%)
 - Google or other search engines (32%)
 - Instagram (32%)

- ✓ Travel frequency
 - 41% travel abroad once a year
 - 41% travel abroad twice or more a year
- ✓ 47% have been to Denmark before
- ✓ These respondents have a high degree of interest in other topics as well:
 - 55% are interested in food/cooking
 - 47% are interested in movies/documentaries
 - 42% are interested in technology and innovation
 - 41% are interested in art
 - 39% are interested in sport
 - 33% are interested in environmental sustainability



Target audience 3: The sustainable internationals

Target audience selection criteria

This section presents the third, and final, selected target audience of this report – “the sustainable internationals”. This audience consists of respondents who:

- ✓ Have environmental sustainability as a top-of-mind topic
- ✓ Have social sustainability as a top-of-mind topic
- ✓ Have either participated in an international music festival previously or plan to participate in an international music festival within the next year

This target audience was chosen because Roskilde Festival has had a large focus on sustainability and equality during the last two years’ festivals and, as such, potential participants with a higher interest in these topics might be more willing to participate in future editions of Roskilde Festival. In other words, if a potential participant is interested in sustainability and equality and is looking to participate in a music festival in the future, then Roskilde Festival’s focus on these topics could give it a competitive advantage compared to other music festival who do not have as high of a focus on these topics.

What constitutes having these environmental and social sustainability as top-of-mind topics is explained in detail on page 42-46, but respondents were, in short, required to score above 4 on two 5-step scales measuring their interest in, and dedication to, the two subjects. Each of these scales were made up of multiple questions that required respondents to choose whether they agreed or disagreed with statements relating to environmental and social sustainability.

To ensure that these respondents have the highest possible likelihood of being interested in international music festivals, another criterion was added, requiring respondents in this target group to either: Have participated in an international music festival abroad previously or be planning to participate in an international music festival abroad within the next year.

The following questions and statements were used to implement the criteria for the selection of this target audience:

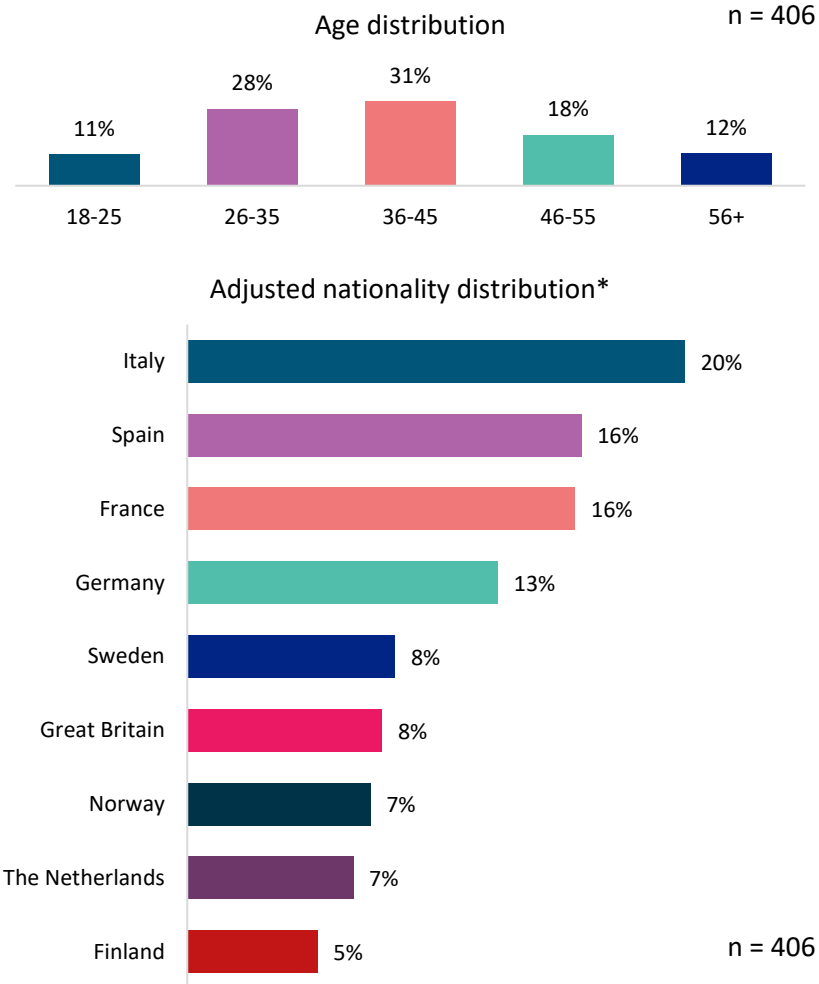
- ✓ **“Environmental protection and sustainability are topics that I think about often.”**
- ✓ **“It bothers me when other people do not care about protecting the environment.”**
- ✓ **“I always encourage others to help protect the environment.”**
- ✓ **“The fact that a company actively takes responsibility for its impact on the environment, makes me more likely to purchase their product, instead of a competing company’s product.”**
- ✓ **“Equality and Social sustainability are topics that I think about often.”**
- ✓ **“On a scale from 1-5, where 1 = not important at all and 5 = very important, how important would it be to you, that a music festival you participated in actively works to improve the level of equality and social sustainability ...”**
 - **Within the festival**
 - **In society in general**
- ✓ **“Do any of the music festivals that you plan to attend take place outside of [insert respondents home country]?”**

The information included in this section is meant to be combined with the section on page 19 about suggestions for implementing the findings from this analysis in a marketing strategy. This section provides information specifically about the target audience, including demographic information, interests and most used information sources, while the section on page 19 provides broader insights from the entire analysis along with a discussion of how these findings can be used strategically.



Analysing the target audience

This target audience consists of 32% of the respondents, who are primarily in the age group 26-45 and live in a wide variety of countries, albeit the largest percentages live in Italy, Spain, France and Germany:

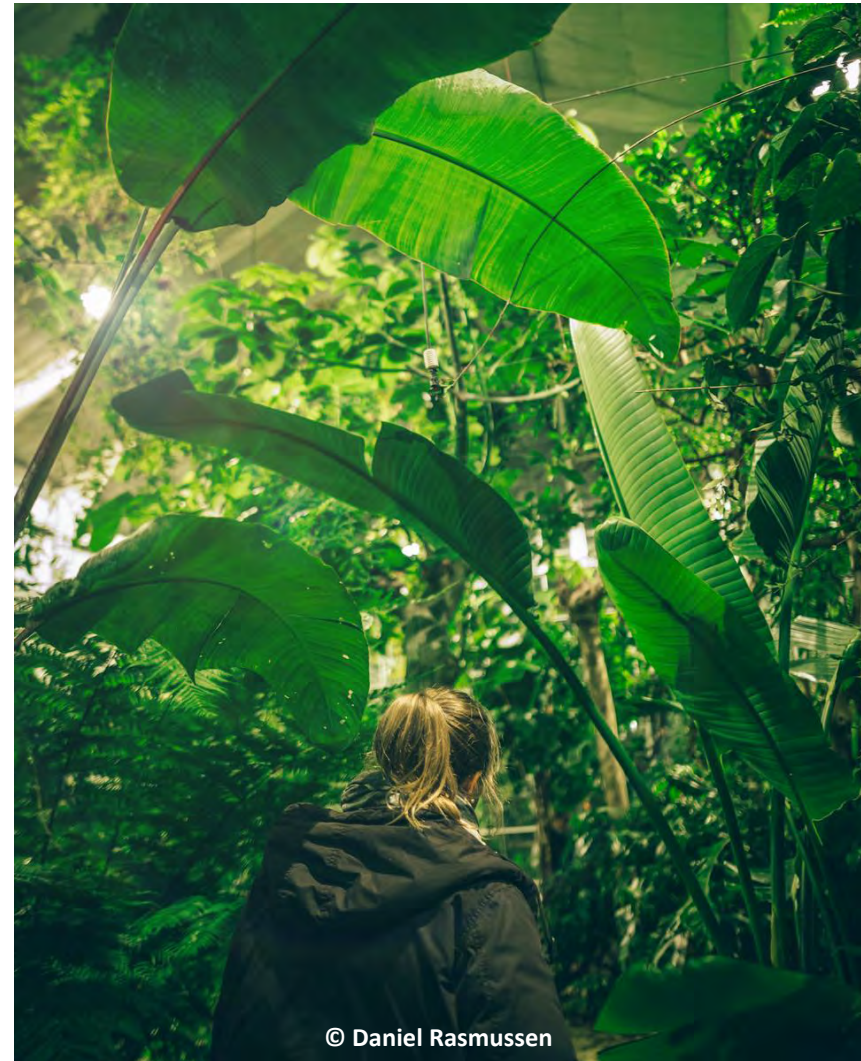


*The nationality distribution was weighted to represent an equal sample size from each market.

Fact sheet

- ✓ Their brand awareness for Roskilde Festival is at 61%
 - 14% have previously participated in Roskilde Festival
 - 47% know about Roskilde Festival, but have not yet participated in the festival
- ✓ The main reasons why they have not yet participated are that:
 - Flight and accommodation costs are too high (39%)
 - Denmark is too far away (34%)
 - Unable to go on holiday during the days of the Roskilde Festival (34%)
 - Not having anyone to go with (33%)
 - The festival ticket is too expensive (32%)
- ✓ Their 3 most liked music genres are pop (67%), rock (66%) and electronic music (39%)
- ✓ The usually find information about music festivals through:
 - The festival's own website (72%)
 - The festival's own social media profiles (52%)
 - Facebook (50%)
 - YouTube (40%)
 - Google or other search engines (38%)
 - Friends/Family (33%)
 - The destination's official tourism website (33%)

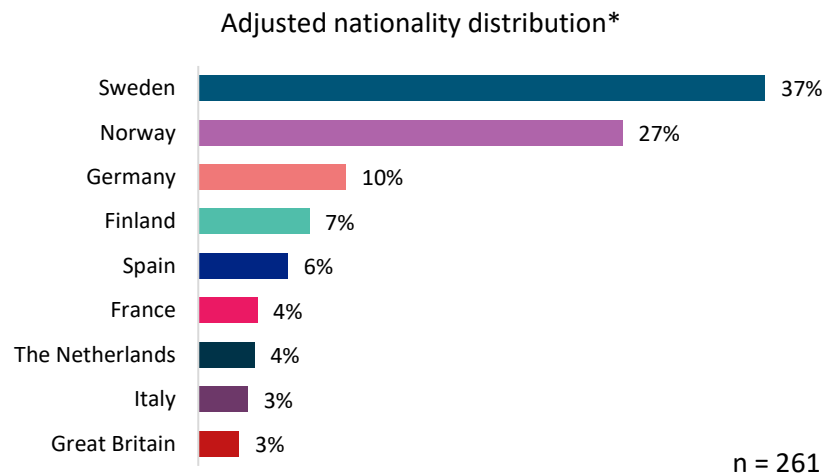
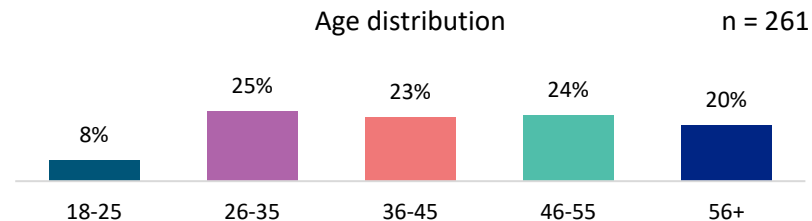
- ✓ Travel frequency
 - 40% travel abroad once a year
 - 42% travel abroad twice or more a year
- ✓ 42% have been to Denmark before
- ✓ These respondents have a high degree of interest in other topics as well:
 - 58% are interested in food/cooking
 - 52% are interested in movies/documentaries
 - 49% are interested in technology and innovation
 - 45% are interested in art
 - 45% are interested in environmental sustainability
 - 41% are interested in sport



Understanding previous participants

This section highlights the previous participants in Roskilde Festival in the same format as the target audiences presented above, but rather than being a target audience, this section is meant to provide an easy way to compare the current audience to the potential target audiences.

This audience consists of 7% of the respondents, who are primarily in the age group 26-45 and live in a wide variety of countries, albeit the largest percentages live in Sweden and Norway:



*The nationality distribution was weighted to represent an equal sample size from each market.

Fact sheet

- ✓ 48% of the respondents plan to participate in a music festival outside of their home country within the next year
- ✓ Their 3 most liked music genres are rock (75%), pop (63%) and Blues (37%)
- ✓ The usually find information about music festivals through:
 - The festival’s own website (64%)
 - The festival’s own social media profiles (43%)
 - Facebook (42%)
 - Friends/Family (40%)
 - YouTube (35%)
 - Google or other search engines (34%)
 - Instagram (24%)
- ✓ Travel frequency
 - 30% travel abroad once a year
 - 50% travel abroad twice or more a year
- ✓ 47% have been to Denmark before
- ✓ These respondents have a high degree of interest in other topics as well:
 - 51% are interested in food/cooking
 - 48% are interested in movies/documentaries
 - 36% are interested in technology and innovation
 - 32% are interested in art
 - 31% are interested in sport
 - 30% are interested in environmental sustainability

Suggestions for Roskilde Festival's future marketing strategy

This section presents a perspective on the future marketing strategy for Roskilde Festival, which incorporates a focus on food, socializing and attending Roskilde Festival as part of a larger experience in Denmark. This should not be viewed as a definitive strategy, but rather as a set of strategic suggestions, based on the finding in this analysis, that can be used when creating a marketing strategy aimed towards attracting the target audiences identified in this analysis.

These suggestions are not necessarily based solely on the findings in this report, but rather on a combination of individual findings and discussions with internal stakeholders from the Development and Communication departments in Wonderful Copenhagen, about the possible implications of the findings in this analysis.

Roskilde Festival as part of a larger Danish experience

63% of the respondents say that they travel abroad on holiday once or more per year. Amongst the respondents who knew about Roskilde Festival, but have not attended the festival:

- ✓ **39% said that flight and accommodation costs were a problem**
- ✓ **33% said that Denmark is too far away from their home country**
- ✓ **29% said that the festival ticket was too expensive**
- ✓ **20% said that they were unable to take a holiday at the time of Roskilde Festival**

Promoting Roskilde Festival as part of a package deal including a more traditional city break holiday could be a way of decreasing the costs for international participants to attend Roskilde Festival. The majority of respondents go on holiday abroad at least once a year and if these

respondents can be convinced to choose Copenhagen as their travel destination, then they would not have flight and accommodation costs associated specifically with attending Roskilde Festival. Instead, these costs would be associated with their city break in Copenhagen, which is only a 30 minutes train ride away from Roskilde train station. There is a train station closer to Roskilde Festival's location, which takes a little more time to get to, but participants could also simply get off at Roskilde train station and walk to the festival grounds, while exploring the city itself. In other words, it will take slightly more than 30 minutes, regardless of whether they continue to the festival specific train station or decide to walk through the city of Roskilde. This is important because respondents were, on average, willing to spend 30 minutes travelling to and from the festival (each way) when travelling abroad for the specific purpose of attending a music festival, but this time requirement might be extended, if the respondents were no longer travelling just to participate in Roskilde Festival, but also to experience a city break in Copenhagen.

A one-way train ticket from the Copenhagen Central Station to the station nearest to the festival grounds is around 48 DKK, which would be about 384 DKK for two one-way tickets for each of the four main days with music, if the international attendees would prefer to stay in a hotel or an Airbnb apartment (this was the case for 71% of respondents). This cost could, for instance, be covered by an early-bird discount or similar for the Roskilde Festival ticket, while making sure that attendees would know that the discount was equal to, or greater than, the costs associated with transport from their hotel/Airbnb to the festival grounds.

In cases where the international participants only travel on holiday abroad once a year, this would let them experience a more

“traditional” city break holiday in Copenhagen while adding the excitement of attending Roskilde Festival. A tourist could, for instance, spent a week in total in Copenhagen, including 4 days of attending the Roskilde Festival and 3 days of enjoying the city of Copenhagen as if they were a normal city break tourist. This would also alleviate the distance concerns in cases where respondents would not be willing to travel that far for an event like Roskilde Festival, but would be willing to do so for a city break holiday. Given that all of the surveyed markets are amongst the top markets for the Capital Region of Denmark, it is likely that this is the case for, at least, a subset of the respondents.

Lastly, 20% of the respondents who had heard about Roskilde Festival, but not attended, said that they were unable to take a holiday at the time when the festival took place. Given that the festival takes place in the middle of the summer where a lot of people go on summer holiday, it is possible that they had simply made other holiday plans already and therefore were not able to attend Roskilde Festival. If the respondents could be convinced to choose Copenhagen as their holiday destination, then this would no longer be a concern, partly because Roskilde Festival would be part of their travel plans from the beginning and partly because the respondents would be travelling to Copenhagen, which is just a train ride away from Roskilde.

Emphasizing the value of food experiences and socializing

Apart from the artists performing at the festival, the respondents put the highest importance of socializing with friends and family as the most important reason for deciding to participate in a music festival, followed by the chance to meet new people that they did not know already. Furthermore, 58% of respondents said that they see food and dining as a chance to socialize with other people. This means that Roskilde Festival could be presented as a way to socialize and try new foods, while enjoying the music and the festival experience in a different setting than they would be able to experience at home. While attending Roskilde Festival, the respondents would be able to socialize in an international context with people who, for several years, have been rated as one of the happiest people on earth¹. Furthermore, it would be an opportunity to experience Danish festival culture.

¹ <http://worldhappiness.report/download/>

Single day tickets to international tourists in Copenhagen

Roskilde Festival sells tickets for each day of the festival. This could be an opportunity to attract international tourists, who have decided to go on a holiday in Copenhagen, but who may not know about the Roskilde Festival. By advertising tickets that give access to Roskilde Festival on the single days where some of the most well-known musicians perform (Eminem 2018, Foo Fighters 2017, Metallica 2013), Roskilde might be able to attract more international participants, albeit for a single day.

These tickets could be advertised on travel sites, such as TripAdvisor or Momondo, and on social media when users search for topics related to travel, Denmark/Copenhagen and/or music. Furthermore, the tickets could be advertised in Copenhagen Airport itself, as well as in locations around the city of Copenhagen that are known to attract many international tourists, such as Strøget and Nyhavn, to maximize the likelihood that they are seen by international tourists.

Taking advantage of existing brand awareness

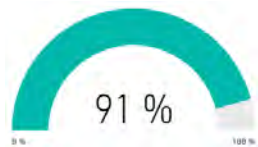
More than 88% of Swedish and Norwegian respondents have heard about Roskilde Festival, but less than 30% of them have previously participated in Roskilde Festival. Furthermore, more than 63% of both Swedish and Norwegian respondents have previously been to Copenhagen. These could potentially be attracted to future Roskilde Festivals by offering them something that they already know (a city-break in Copenhagen) with the new, exciting experience of participating in Roskilde Festival. Given that they already know the city of Copenhagen and the short distance from Sweden/Norway to Copenhagen, this could minimize any barriers to attendance, while taking advantage of the high pre-existing brand awareness.

In-depth analysis results

Previous and future music festival participation

One-third were planning to participate in a foreign music festival abroad within the next year

This section of the report will highlight the main indicators of potential, found in this analysis. While there are other factors that are likely to affect a person's potential to participate in Roskilde Festival, the two main ones in this analysis are the respondents' previous experience with participating in music festivals as well as their current intentions of whether to participate in any music festivals within the next year.



91% of the respondents have participated in a music festival before. While this was the case for the respondents from most of the countries, just 77% of respondents from Italy had

previously participated in a music festival. Most of these past festivals were located in the respondents' own home country. Specifically, the respondents had, on average, participated in 2.2 domestic and 0.4 foreign music festival. The Swedish respondents had the lowest average of domestic music festivals participated in at 1.7, while the Spanish respondents had the highest at 2.5. The remaining markets were very close to the average.

As for foreign music festivals, Germany and Norway had the highest averages at just above 0.5, while Finland was significantly below the average at 0.2. The other markets' averages deviated a bit from the average as well, but not significantly.

69% of the respondents had participated in a music festival within the last 3-4 years (between 2015 and 2018).

The Spanish and Swedish respondents stood out, however, given that 80% of Spanish respondents had participated in a music festival within this time period, while this was the case for just 57% of Swedish respondents.



67% of the respondents said that they were planning to participate in a music festival within the next year. Especially the Southern European respondents from Italy and Spain were planning to participate in music festivals within the next year, with 91% and 84% of respondents, respectively, saying that this was the case. On the other hand, respondents from Sweden and Norway were the ones who had the least degree of intention to participate in a music festival within the next year, at 44% and 59% respectively.

34% of the respondents were specifically planning to attend music festival outside of their home country, within the next year. Italian, Norwegian, German and French respondents, in particular, had plans to attend foreign music festival within the next year at 45%, 45%, 42% and 39% respectively. On the other hand, just 17% of the Finnish respondents were planning to participate in foreign music festivals.

All in all, 59% of the respondents had both participated in a music festival previously and were planning to do so within the next year.

The main reason for attending a music festival, was the artists playing at the festival

Knowing the respondents' intentions to participate in foreign music festivals is one step towards being able to attract them to Roskilde Festival, but more information is required, such as what factors affect a respondent's willingness to participate in a specific music festival and what factors determine their satisfaction with the festival, when it is over.

The respondents were asked to rate 5 different factors on a scale from 1-5 based, (with 1 = not important and 5= very important) on each factor's importance for their decision to participate in a given music festival. Below is the average score for each factor:

- ✓ **The artists performing at the festival:** 4.4
- ✓ **Socializing with friends and family:** 3.8
- ✓ **Meeting new people:** 2.9
- ✓ **That the music festival's proceeds are donated to charity:** 2.9
- ✓ **My friends and I have a tradition of participating in a specific music festival:** 2.8

None of the markets rated the artists playing at the music festival lower than a 4.2 on average. Given the nature of music festivals this is to be expected, but it stands as quite a significant contrast to the other four factors. Respondents from Finland, Germany and Sweden all rated this aspect at 4.5, on average, or higher, while respondents from the Netherlands rated this the lowest at 4.2.

While all of the countries, on average, rated socializing with friends and family about the same (3.8), there was a difference in the respondents' interest in meeting new people that they did not already know. Spanish and Italian respondents, in particular, rated this aspect higher than the other respondents at 3.2-3.3, while Finnish respondents gave this aspect the lowest ranking at 2.4.

When weighing the importance of music festivals donating their proceeds to charity, Spanish (3.5), French (3.4), and Italian (3.3) respondents rated this higher than respondents from the other countries. On the other hand, this aspect was less important to respondents from Finland (2.4), Norway (2.4) and Sweden (2.4).

Lastly, participating in a particular music festival as a tradition amongst friends, was, on average, the lowest rated aspect of the five. Spanish (3.4) and French (3.1) respondents were the ones who rated this the highest, while Swedish (2.3) respondents rated it the lowest.

Varying importance of different festival aspects for participant satisfaction

Another important aspect to consider when gauging the potential of international markets as participants in Roskilde Festival, is their expectations for the festival itself. This is important for two reasons:

1. Higher satisfaction increases the chance of repeat participation over multiple years
2. Higher satisfaction increases the chance of participants recommending Roskilde Festival to their friends and family

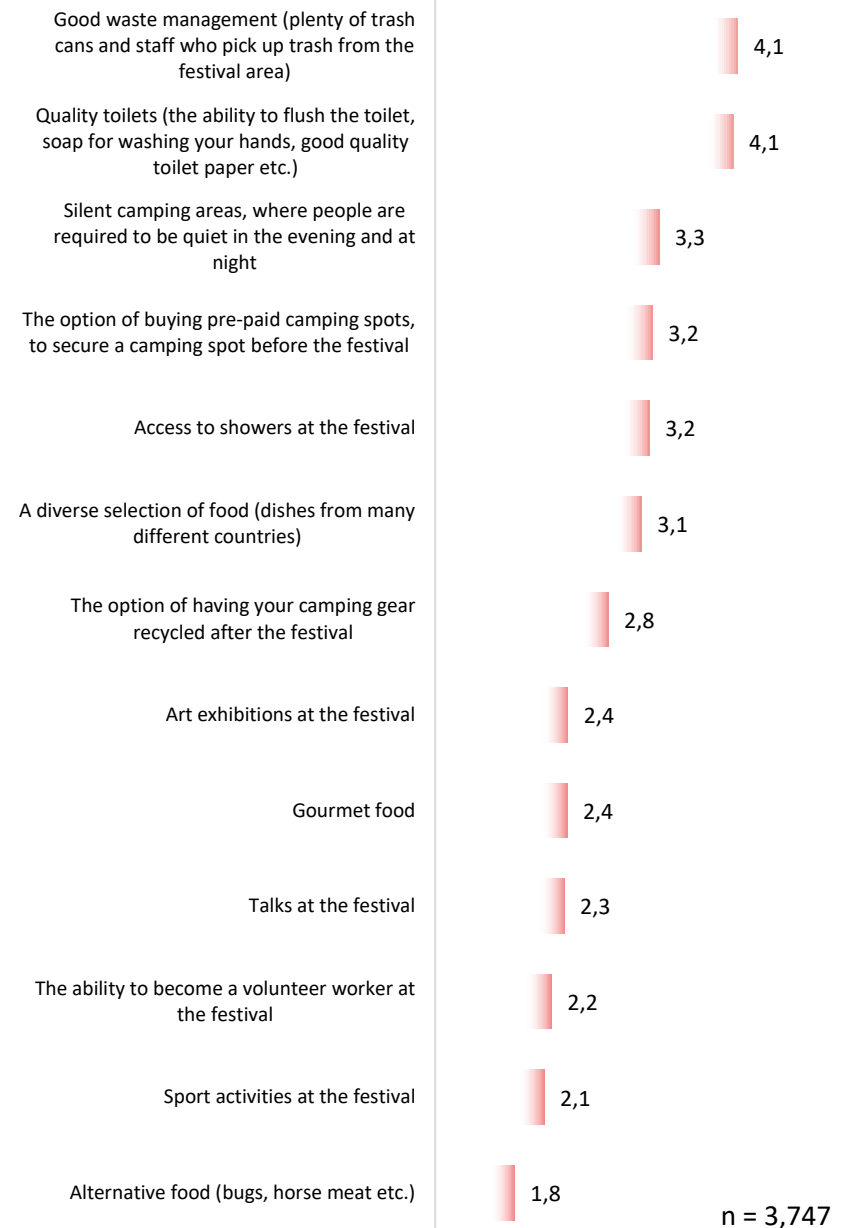
As such, respondents were asked to rate 13 aspects of a festival, on their importance for their satisfaction with participating in any given music festival. The average ratings, on a scale from 1 = not important to 5 = very important, are shown in the graph on the right.

Interestingly, German and Dutch respondents rated quality toilets the highest, while all other markets rated waste management the highest.

German (4.3), Italian (4.2) and British (4.2) respondents, in particular, found waste management to be important, while it was slightly less important for Dutch (3.9) and Norwegian (3.9) respondents.

In terms of the importance of quality toilets, German (4.4) and Italian (4.2) respondents deemed it significantly more important than the average, while Norwegian (3.6), Finnish (3.8) and Swedish (3.9) respondents thought it to be less important.

The option of having your camping equipment recycled is rated surprisingly low considering the number of participants who leave their camping equipment behind at the festival. Spanish (3.4) and French (3.0) respondents were significantly above average, but Dutch, Norwegian and Finnish respondents rated this option at 2.5 or lower, which is quite unfortunate given that Norway and Finland are 2nd and 4th largest markets for previous participants at Roskilde Festival.



Pop and rock music preferred by music festival participants

Roskilde Festival is a music festival that hosts artists whose music covers a wide variety of different music genres. When trying to attract more international participants, it is important to know whether these participants like the genres of music that are primarily played at Roskilde Festival. Trying to attract participants who, for instance, primarily like classical music might be counter-productive. Instead these resources could be better spent on attracting potential participants who, for instance, primarily listen to pop or rock music. The following is the respondents' preferred music genres:

- ✓ **Pop: 66%**
- ✓ **Rock: 66%**
- ✓ **R&B: 31%**
- ✓ **Blues: 29%**
- ✓ **Electronic: 27%**
- ✓ **Classical: 25%**
- ✓ **Hip-hop: 24%**
- ✓ **Jazz: 22%**
- ✓ **House: 22%**
- ✓ **Rap: 20%**
- ✓ **Dubstep: 7%**

The average respondent selected 3.4 of the above genres, but respondents from the Netherlands had the lowest average of 2.9, while respondents from Great Britain and France had the highest averages at 3.7 and 3.6, respectively.

Hip-hop and Rap are two genres that share a lot of traits. As a result, there is a chance that respondents who have only chosen one of the two, will also like the other, but for one reason or another did not select it in this question. To account for that, the results for these two genres were cross-examined, which showed that just short of 30% of the respondents chose Hip-hop and/or Rap as a genre that they like.

Some of the genres had slight variations in the percentage of respondents from each country who enjoyed them. For instance:

- ✓ **Italian (72%), Spanish (72%) and Dutch (71%) respondents enjoyed Pop more than the average, while German (58%) respondents were slightly below average.**
- ✓ **Swedish (76%), British (71%) and Finnish (70%) respondents enjoyed Rock more than the average, while Dutch (47%) respondents were significantly below average.**
- ✓ **French (39%), British (38%) and Swedish (37%) respondents, in particular, enjoyed R&B, while Spanish (17%) and Italian (23%) respondents were below average.**
- ✓ **German (23%) and Spanish (24%) respondents were less keen on Blues.**
- ✓ **Spanish (42%) respondents enjoyed Electronic music significantly more than the average, while Norwegian (20%) respondents were slightly below average.**
- ✓ **British (32%) respondents enjoyed Classical music more than the average, while Dutch (16%) were significantly below average.**
- ✓ **French (31%) and Italian (30%), in particular, enjoyed Hip-hop, while Finnish (17%) and Dutch (18%) were somewhat below average.**
- ✓ **Italian (30%) and French (28%) respondents enjoyed Jazz more than the average, while Swedish (16%) and Dutch (18%) were somewhat below average.**
- ✓ **German (27%) and Swedish (26%) respondents enjoyed House more than the average, while Finnish (13%) and Norwegian (15%) were significantly below average.**
- ✓ **French (24%) and Italian (24%) respondents were keener on Rap, than the average, while Dutch (12%) respondents were below average.**
- ✓ **German (11%) were keener on Dubstep, while Italian (4%) and Spanish (4%) respondents were below average.**

These findings are interesting, because the line-up of artists booked for Roskilde Festival in a given year can potentially affect which international markets would be most responsive to a marketing campaign from Roskilde Festival.

An example of this could be the fact that Eminem performed in Roskilde Festival 2018 and, based on the above results, French and Italian respondents, in particular, enjoy Hip-hop/Rap music. Therefore, Roskilde could choose to either focus more on those two markets for the 2018 Roskilde Festival or simply focus the marketing in those two markets more on Eminem as one of the main acts, while the marketing in other markets could be tailored more towards other preferences.

Another example would be the 2011 Roskilde Festival, where Deadmau5 was one of the main acts. In that case, Germany, Sweden and Spain might have been high profile markets to target with a marketing campaign, given their above average preference for House music, while a marketing campaign in Sweden, Britain and Finland might focus more on Kings of Leon and Iron Maiden, given those markets' above average preference for Rock music.

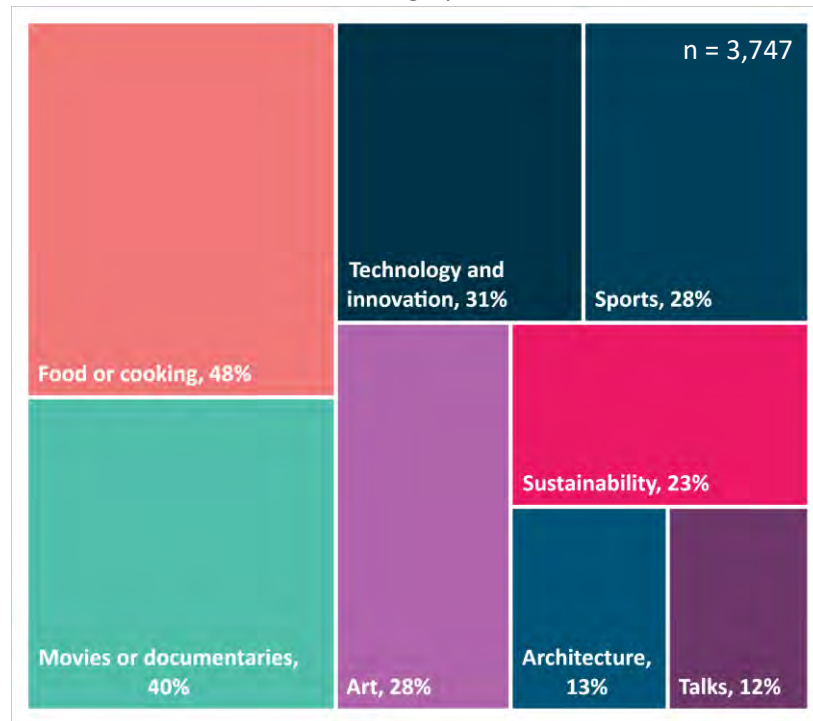


High interesting in food, movies and technology as festival topics

All the respondents in this study have confirmed their interest in music festivals, but Roskilde Festival includes events/exhibitions that cover a wide variety of topics, such as art, sustainability and technology.

Roskilde Festival also features a large variety of food options, making food a very relevant topic for the festival too. Therefore, it would be interesting to find out whether these respondents show any kind of interest in other festival topics and to what degree these different topics are popular in each market.

The different topics, and the percentage of respondents who selected each of them, can be seen in the graph below:



Especially the Italian (60%) and British (54%) respondents were interested in food/cooking, while Dutch (37%) respondents were less

interested in food/cooking than the average.

Movies/documentaries were chosen as an interest by significantly more Spanish (51%) and Italian (46%) respondents than the average, while the Dutch (32%) and Norwegian (36%) respondents were less keen on this topic.

Technology and innovation was the topic that caused the largest diversion amongst the markets. Spanish (53%) respondents were, by far, more interested than the average respondent and while Italian (42%) and French (39%) respondents also showed a significantly higher interest, their interest was still significantly lower than the Spanish respondents. Dutch (20%), Finnish (22%) and British (26%) respondents were, however, significantly less interested compared to the average.

For sports, Spanish (38%) and Italian (38%) respondents showed a significantly higher interest, while Norwegian (22%) and British (23%) respondents were less inclined to find this interesting.

Italian (41%) respondents were, by far, the most interested in art. Spanish respondents (33%) were also significantly more interested compared to the average, albeit to a significantly lesser extent than the Italians. Dutch (21%) and Norwegian (24%) respondents showed the least amount of interest in art as a festival topic.

French (29%) and German (28%) respondents were more interested in sustainability as a festival topic, than the average, however, Dutch (16%), Norwegian (17%) and Finnish (18%) respondents were less keen on this topic.

For talks, the most interested respondents were the Spanish (18%) and French (17%), while Dutch (7%) respondents, in particular, were not as interested in this topic.

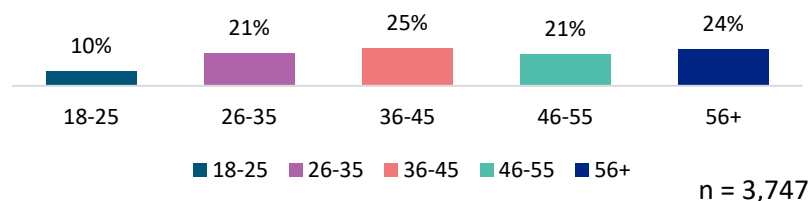
No significant differences were found for architecture.

Demographic composition

35-46 years old high school graduates

This section presents the demographic composition of the respondents. That is, their age, gender, nationality, occupation and most recently completed level of education. This information can be used to identify the right segments to target with marketing activities, especially in cases of online marketing, which often offers the ability to select highly detailed segments to be targeted by marketing campaigns.

Age distribution

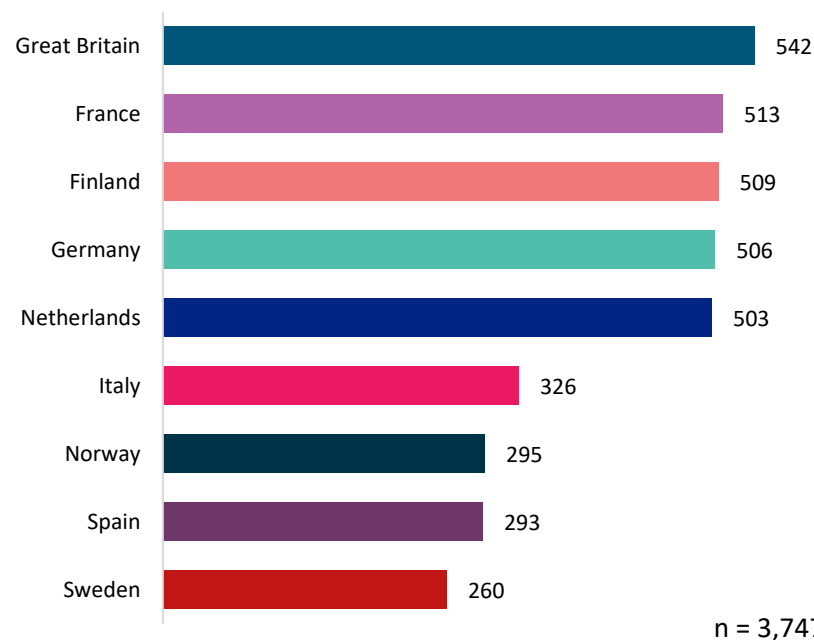


The age distribution shows a surprisingly even split of respondents in most of the age groups, which indicates that music festivals is something that is of interest to a wide variety of age groups. On average, 69% of the respondents in all age groups have participated in a music festival within the last 3-4 years (between 2015 and 2018). This does, however, vary slightly depending on the age group in question. Around 56% of respondents aged 56+ have participated in a music festival within the last 3-4 years, while this is the case for 88% of respondents in the age group 18-25. In general, younger respondents seem to be more active participating in music festivals, but the data shows that even the older generations are still participating in music festival.

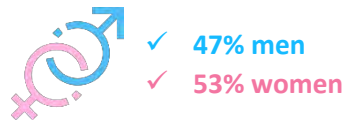
The age distribution varies slightly based on nationality, with Italy and Spain having the youngest average age at 41-42 and the Netherlands having the highest average age at 46. The remaining countries have average ages between 43 and 44.

The nationality distribution for this survey was predetermined, but can be seen in the graph below, for clarity purposes. Please see the previous section on methodology for an explanation of the variance in respondents between different nationalities.

Nationality distribution



The gender distribution for the respondents was almost evenly split between men and women:



There were, furthermore, no significant differences in the gender distribution between the different countries.

There was, however, a significant difference in the gender distribution for the respondents who had previously participated in Roskilde Festival. 64% of these respondents were male, while just 36% were female.

7 out of 10 respondents were currently employed

Looking at the respondents' occupation shows that 71% of them are currently employed in a full or part time position, which affects their level of disposable income. If Roskilde Festival aims to convince international tourists to travel to Copenhagen in order to participate in the festival, then these tourists need to have the financial means to be able to do so. None of the surveyed countries had an unemployment rate above 37% amongst the respondents, but some countries did have more unemployed respondents than other. These were:

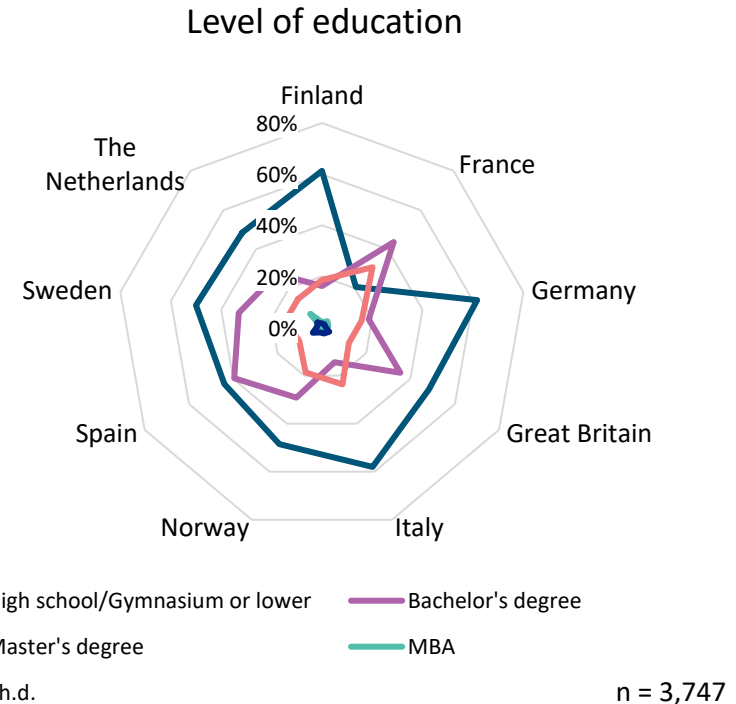


The remaining countries had unemployment rates of 26% or less.

The previous participants in Roskilde Festival had an even lower unemployment rate at 16%. Unemployment correlates.

51% of respondents had a bachelor's degree or higher

However, the level of education amongs the respondents varied significantly between some of the markets, as shown in the graph below:



Finland, Germany and Italy had the highest percentage of high school graduates, while France stood out in terms of having the highest average education amongst its respondents.

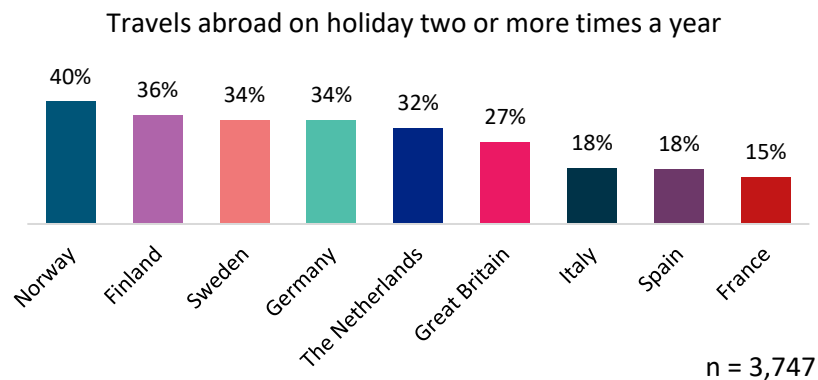
Travel habits

More than 60% travel abroad once a year

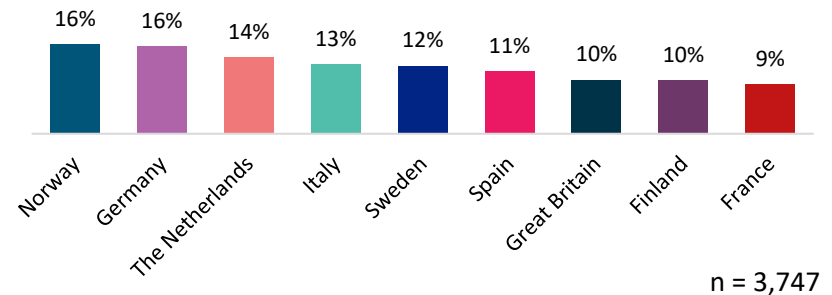
This section looks at the travel habits of the respondents, including whether they have ever been to Denmark and/or Copenhagen specifically.

63% of the respondents travel abroad on holiday at least once a year. Given that the Roskilde Festival is a yearly event, this means that there is a yearly chance to attract some of these 63%. The remaining respondents said that they travel abroad on holiday less than once a year and as such will not necessarily be planning a holiday abroad every year that the Roskilde Festival takes place. As such, a subset of the potential participants from each of the countries should be expected to be unavailable for participation in any given year.

Higher leisure travel frequency should, all else equal, lead to a higher chance of travelling to participate in a music festival. Looking at the percentage of respondents in each country who travels abroad on holiday two or more times per year, shows interesting differences between the markets:



Comparing this to the percentage of respondents, in each country, who has participated in music festivals abroad in the past or plans to do so in the future, results in a ranking of the markets in terms of which has the highest potential to attract for future editions of the Roskilde Festival. **The following is the percentage of respondents, in each country, who both travel on holiday abroad two or more times a year and have either previously participated in a music festival abroad or plans to within the next year:**



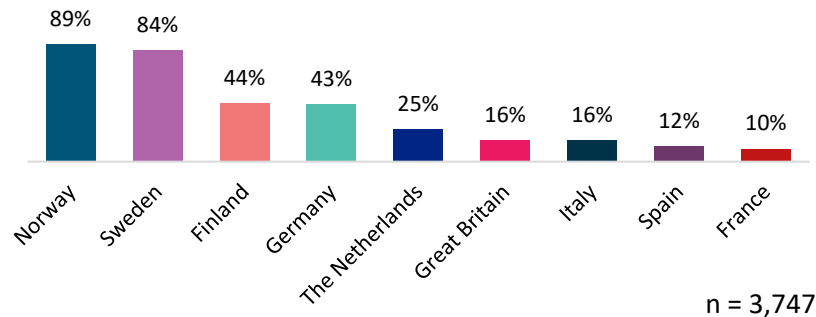
Based on these two criteria alone, it should be expected that a marketing campaign to attract international participants to Roskilde Festival would have the most potential in Norway, Germany and The Netherlands.

While this is one way to indicate the potential of the markets, there are other variables in the dataset that can also be used for this purpose and these will be explored further in later sections of the report.

Nearby markets were most familiar with Denmark

Looking at the respondents' experience with travelling to Denmark reveals results that are to be expected, given the geographic distances between Denmark and each of the surveyed countries:

Respondents who have been to Denmark previously



As the graph shows, there is a strong correlation between the percentage of respondents in each of the countries who have been to Denmark before and the distance between Denmark and the given country. However, some countries, have lower visitor percentages than you would expect, if you looked solely at the distance between the countries. France, for instance has a lower visitation percentage than Italy and Spain. Similarly, Great Britain has a lower percentage than Germany. While certain parts of northern Germany might be closer to Denmark than Great Britain, the majority of Germany is further away simply due to the geographic size of the country.



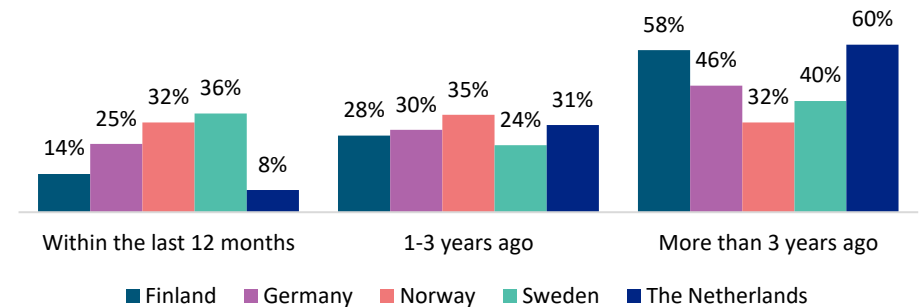
For the majority of the respondents from each country, who had previously visited Denmark, it had been more than 12 months since their last visit, which has two implications: On one hand, respondents who have been to Denmark more recently will be more familiar with the country

and, as such, might be more willing to visit Denmark again, in order to participate in the Roskilde Festival, because their familiarity with the country means that such a trip would require less planning.

On the other hand, for respondents, for whom it has been longer since they travelled to Denmark, it might be more tempting to revisit the country, because their memory of it is not as recent and as such there is likely to be more things that can surprise them during a visit.

This likely has to do with each person's travel preferences and whether they like to experience something completely new or whether they like visiting places that they are somewhat familiar with. It is, however, something that could be researched more to find out whether marketing communication could potentially benefit from revolving around on of these two travel preferences or whether it would not have any significant effect. It is also something that could simply be experimented with by using A/B tests in, for instance, Google AdWords.

Time since last visit to Denmark*



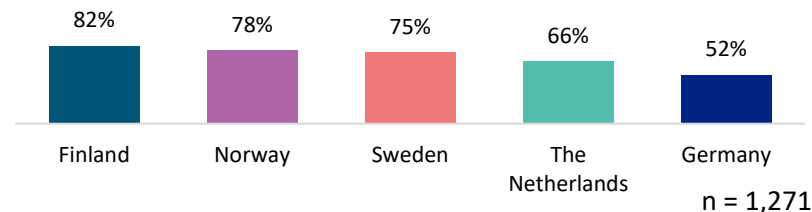
*Great Britain, Italy, Spain, France were excluded from the graph because the sample of respondents who had previously visited Denmark was too low (<100) to generalize the results.
n = 124-262

Nearby markets were also most familiar with Copenhagen

The respondents who had previously travelled to Denmark, were asked if they had visited Copenhagen specifically. Given that too few of the respondents from Great Britain, Italy, Spain and France had been to Denmark previously for the results to be meaningfully generalized, these countries have also been excluded from the following results.

Unsurprisingly, the majority of the respondents who had previously been to Denmark, had been to Copenhagen specifically.

Percentage of respondents who have been to Denmark before, who have visited Copenhagen specifically



This does not, however, mean that respondents who have been to Denmark, but not Copenhagen specifically are not of interest when it comes to attracting international participants to Roskilde Festival. Copenhagen is simply a popular destination that is within a reasonable distance to Roskilde, which means that tourists staying in Copenhagen could commute back and forth between the Roskilde Festival and their accommodation in Copenhagen, if they wanted to.



For the majority of the respondents, it had been more than a year since their last visit to Copenhagen, as shown in the graph on the right². An interesting result can, however, be found by comparing the respondents last visit

^{2,3} The Netherlands was excluded due to low sample size of respondents who have been to Copenhagen before (<100).

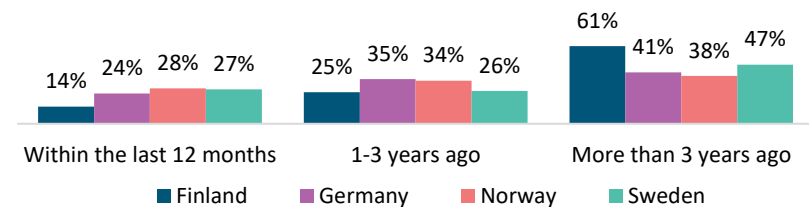
to Denmark and their last visit to Copenhagen. A subset of the respondents who have been to Copenhagen have visited Denmark again, afterwards, without visiting the city of Copenhagen again. This was specifically the case for³:

- 25% of the German respondents*
- 25% of the Norwegian respondents*
- 21% of the Swedish respondents*
- 8% of the Finnish respondents*

*Who had previously been to Copenhagen specifically.

In total, 20% of the respondents, from these five countries, who had previously been to Copenhagen said that it had been longer since their last holiday in Copenhagen, than it had been since their last holiday in Denmark. This, combined with the fact that 29% of the respondents, from these five countries, who had been to Denmark previously, had not been to Copenhagen previously, which suggests that tourists interested in music festivals do not necessarily only travel to Copenhagen. Rather, they are also interested in visiting other parts of Denmark. Whether these previous holidays in Copenhagen and Denmark were music related is unknown, but it shows a potential for attracting them to Roskilde Festival.

Time since last visit to Copenhagen*



n = 113-203

High brand awareness

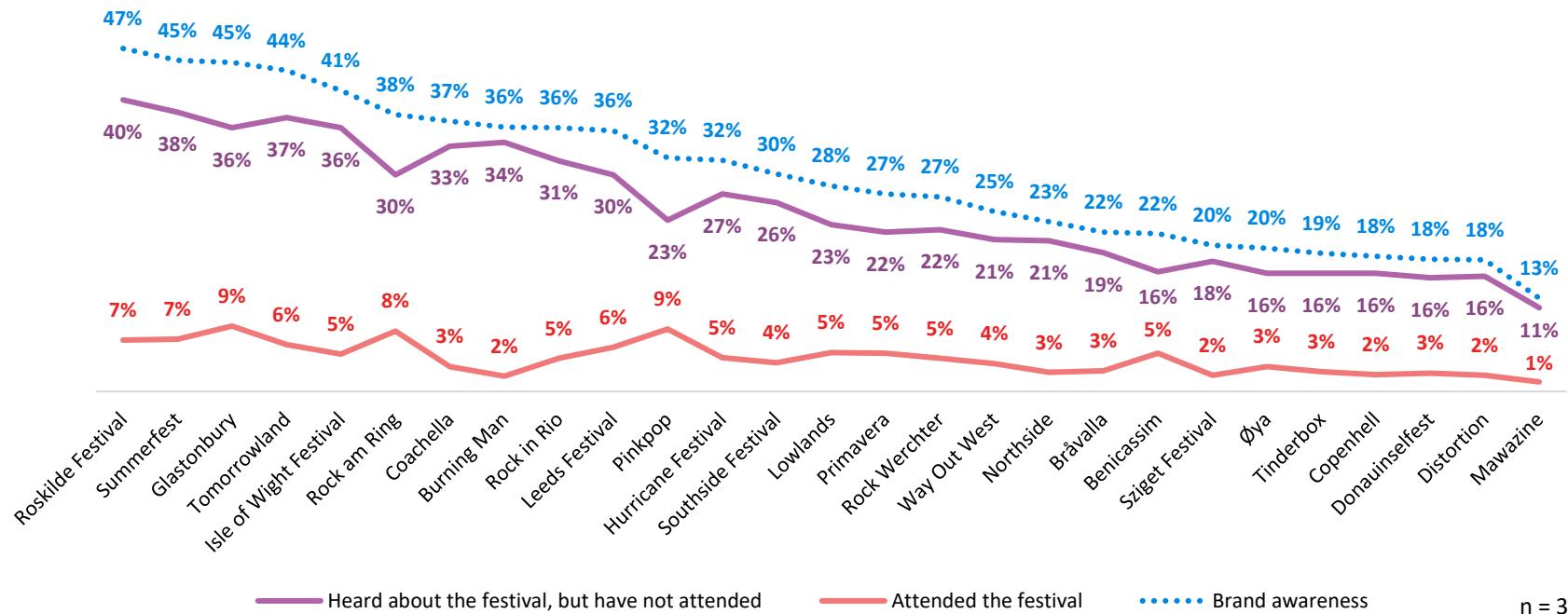
This section of the report looks at the brand awareness of different music festivals around the world, as well as the reasons why respondents who have heard about Roskilde Festival, have not attended the festival. This section will, furthermore, look at the information sources most commonly used by festival participants.

Roskilde Festival has the highest brand awareness

The graph below shows the percentage of respondents who have heard about and participated in each of the chosen festivals, as well as the brand awareness for each of the festivals.

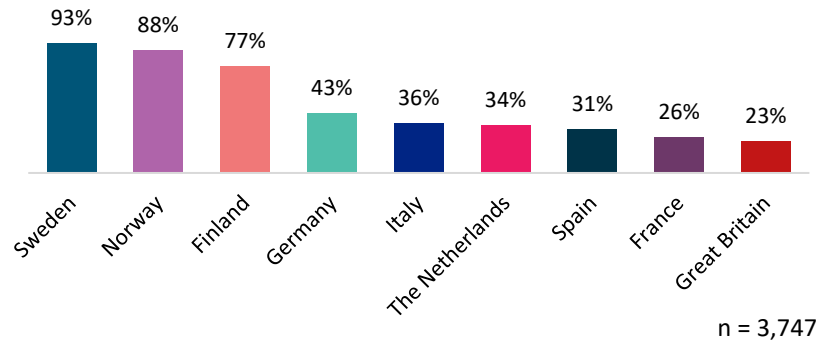
The music festivals' brand awareness is the sum of the percentage of respondents who have heard about and participated in a given festival. For example, the brand awareness for Roskilde Festival is 47%, which is quite substantial, especially considering that no other music festival on the list has a higher brand awareness. This result also highlights some of the main competitors of Roskilde Festival, given that higher brand awareness for other music festivals increases the chance of people choosing to participate in those other festivals instead of Roskilde Festival.

Brand awareness amongst select music festivals



n = 3,747

As shown below, the brand awareness was highest in Sweden (93%) and Norway (88%) and varied in the remaining markets, with Great Britain having the lowest brand awareness of all surveyed markets:



28% of the Swedish respondents had previously participated in Roskilde, while this was the case for 21% of the Norwegian respondents. On the other hand, previous participation was particularly low in Great Britain (2%), The Netherlands (3%), France (3%) and Italy (3%).

In terms of the percentage of respondents who had heard about Roskilde Festival, but not attended the festival, Finland (71%), Norway (68%) and Sweden (65%) stood out in particular. Great Britain (77%), France (74%) and Spain (67%) topped the list of countries where the most respondents had not heard about Roskilde Festival.

The high brand awareness for Roskilde Festival is an opportunity waiting to be utilized, in the sense that a lot of people already know about the festival and rather than having to create awareness, Roskilde Festival simply needs to figure out how to activate the awareness that already exists. That is, find out what the barriers are preventing these potential participants from attending Roskilde Festival.

Price was the main barrier to participating in Roskilde Festival

The respondents who had heard of Roskilde Festival, but had not participated in it, are somewhat divided in terms of their mean reasons for not participating. The respondents were asked to choose their top three reasons for not having participated in Roskilde Festival, to which they chose as follows:



n = 1,489

These top three reasons chosen varied slightly by country:

- ✓ Respondents from The Netherlands (59%), France (54%), Italy & Spain (48%), in particular, thought that Denmark is too far away, while markets such as Norway (8%) and Sweden (12%) were, expectedly, less bothered by the distance.
- ✓ The Norwegian respondents (20%) cared the least about the price of the festival ticket, compared to an average of 29%, while the French (35%) and Finnish (33%) respondents were the most price sensitive.
- ✓ The flight and accommodation costs were of least concern to the Norwegian (22%) and Swedish (24%) respondents, while being of higher concern for the Finnish (48%), British (47%) and Italian & Spanish (47%) respondents.
- ✓ Respondents from The Netherlands were the least concerned about going with someone they knew (17%), while this was a popular reason amongst Swedish (36%), German (33%) and French (33%) respondents
- ✓ French (28%), Italian & Spanish (27%) and Norwegian (24%) respondents most often said that they were not able to go on a holiday during the time of Roskilde Festival
- ✓ British (11%) and Italian & Spanish (10%) respondents most often mentioned other festivals as their reason for being unable to attend Roskilde Festival
- ✓ Swedish (25%) and Norwegian (22%) respondents were the least keen on Roskilde Festival's music programme, while all remaining markets were significantly more likely to enjoy the music program. For instance, Germany had the third-highest percentage of respondents who chose this answer, at 17%, while all other markets were below the average of 14%

- ✓ British (29%), Finnish (28%) and Italian & Spanish (26%) respondents, in particular, felt that they did not have enough information about the festival
- ✓ Norwegian respondents (27%), in particular, said that they were more interested in other music festival

Some of these reasons for not attending Roskilde can potentially be improved. The respondents who said that they were unable to go on a holiday during the time of Roskilde Festival may have planned other holiday activities before finding out about the Festival, in which case it might simply be a question of timing. That is, to get Roskilde Festival to the respondents' top-of-mind before they plan other holiday activities that coincide with the dates were Roskilde Festival takes place.

Likewise, flight and accommodation costs can potentially be minimized by getting international participants to book their holiday in Copenhagen well in advance of the festival. Flight and accommodation costs tend to increase by a large margin as the time between booking and departure decreases. Therefore, some kind of early bird discount for participants could potentially convince them to book their festival tickets well in advance, which, in turn, could incentivize them to book their flight and accommodation well in advance as well. Alternatively, the respondents most concerned with flight and accommodation costs could potentially be recruited as volunteers. This would free up the costs for the festival ticket to cut down on the flight and accommodation costs. Alternatively, Roskilde Festival could offer to help with flight and accommodation costs for volunteers.

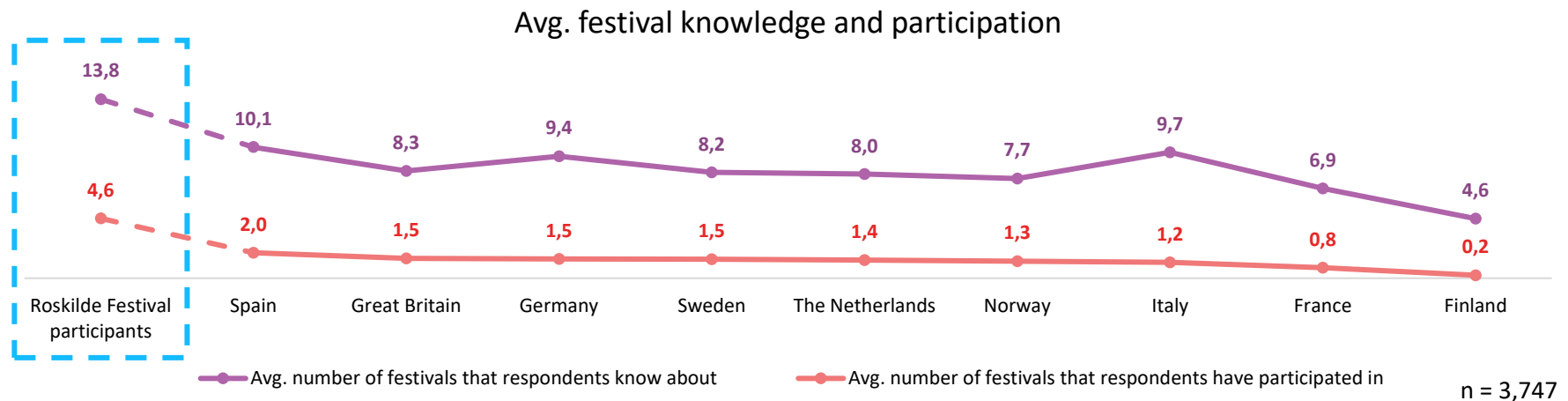
Correlation between level of knowledge and participation

Just like brand awareness for Roskilde Festival and other music festivals varies based on the country in question, there is a difference between how active the different respondent groups are in terms of gathering knowledge about different music festivals and participating in different music festivals.

The graph below shows the avg. number of music festivals that respondents in each of the countries had knowledge of as well as the average number of music festivals that they had previously participated in.

This information is interesting for two reasons: Firstly, the data shows which countries might be more likely to know/find out about Roskilde Festival, since there could be a potential correlation between current knowledge and the respondents' level of active research about music festivals. If this is true, then markets such as Spain, Germany and Italy would be prime candidates to discover the Roskilde Festival without the need for as much campaign effort as it might take to increase brand awareness in, for example, Finland.

Secondly, it allows for a comparison of the avg. level of knowledge and participation amongst Roskilde Festival participants specifically and the other respondents. As it turns out, previous participants in Roskilde Festival have, on average, a significantly higher overall knowledge of different music festivals as well as a significantly higher rate of participation in different music festivals. This is potentially important for the conversion rate of future marketing material, in the sense that Roskilde Festival could market their festival not just based on demographics or active engagement with the Roskilde Festival brand, but also based on potential participants' engagement with other music festival brands. One way of doing this would be to identify groups on social media with high engagement amongst music festival related pages and posts. Another way could be to cooperate with other music festivals who would also like to receive more international participants. Roskilde Festival could, for instance, sell tickets that give access to Roskilde Festival as well as another Danish or international music festival that takes place close to, but not at the same time as Roskilde Festival. The other festival could, for instance, take place in early June or early August, to give participants a little room in-between the two festivals, but still make it feel like a coherent experience.



Social media & word-of-mouth were popular sources of information

Looking at the way respondents search for information both before and after they decide whether to participate in a given festival, reveals that 68% use the festivals own website, however, many respondents used one or more social medias to find information about music festivals.

In fact, 70% of respondents usually use at least one information source that can be classified as a social media, including TripAdvisor, Reddit and Pinterest. Narrowing the definition of social media to the more traditional ones (Facebook, Instagram, Twitter and YouTube) results in a slightly lower percentage (68%) of respondents who used social media to look for information, but it is still almost 7/10 respondents who used at least one of those four social media platforms to look for information about music festivals.

Added to this is the fact that 31% of respondents usually use a search engine to find information and it is fairly likely that a subset of these searches lead to one or more social media platform, although this cannot be proven based on the data at hand.

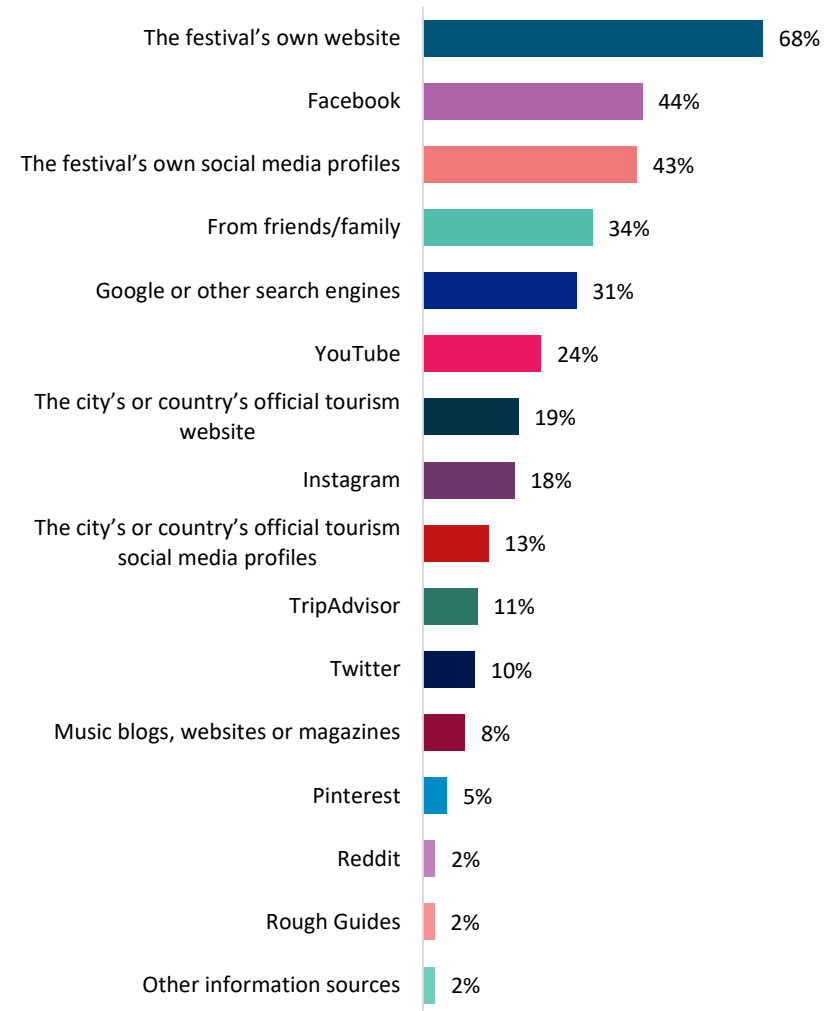
In a marketing context this means that Roskilde Festival needs to have a lot of emphasis on their social media communication and making sure that Roskilde Festival is amongst the most visible music festivals on these social medias. This requires:

- ✓ Uploading relevant content, regularly
- ✓ Creating content that makes users want to engage
 - Engagement leads to information being spread further in users' social circles, because their friends can see what content the users are engaging with

Optionally, Roskilde Festival could engage in paid social media marketing, which can target users who are not necessarily engaging

with Roskilde Festival's own content, but are, nonetheless, engaging with content related to music festivals and similar topics.

"Where do you usually find information about festivals, both before and after you decide whether to participate in the festival?"



n = 3,747

German and British respondents used most information sources

While the overall trends are interesting on their own, there were also differences between the markets in terms of the average number of information sources used based on the market in question, as well as the percentage of respondents within each market that chose to use some of the specific sources.

The respondents, on average, used 3.3 different information sources, with German (3.7) and British (3.5) respondents using slightly more information sources, on average, and Dutch (3.0) respondents using the lowest number of information sources, on average.

Especially the German (76%) and Dutch (74%) respondents said that they usually use the festival's own website to find information, while this was the case amongst the least percentage of Swedish (54%) and Norwegian (59%) respondents. This could be relevant in terms of figuring out which languages that it might be beneficial to translate Roskilde Festival's website into.

Most of the markets had about the same percentage use of the festival's own social media profiles, however, only 32% of French respondents chose this option, as opposed to an average of 43%.

While 44%, on average, used Facebook to find information, this was slightly higher amongst British and Norwegian respondents, both of which were at 50%, on average. In contrast, only about 38% of Swedish respondents said that they usually use Facebook.

Information from friends and family was another popular source of information amongst the respondents, however especially Norwegian (43%) and German (40%) respondents usually receive information from friends and family, while this was a less popular source of information amongst Italian (22%), Spanish (26%) and French (29%) respondents. In other words, getting friends and family to recommend

the Roskilde Festival might be more prudent on some markets. It would likely be difficult to only encourage certain markets to recommend Roskilde Festival, but at an average use of 34% amongst all respondents, it is the 4th most popular information source and, as such, launching festival wide initiatives to get participants to engage more on social media is likely to be a good strategy for the future communication of Roskilde Festival. This would, likely, also strengthen the brand given that brand stories would no longer only be told by the festival itself, but would also be echoed by the actual participants, strengthening the messages' believability.

Lastly, as might be expected, the number of different information sources used, on average, was also highly correlated with the age of the respondent in question. That is, the youngest respondents in the age group of 18-25 used 4 information sources, on average, while the oldest age group of 56+ used an average of 2.8.

Volunteering

Half of respondents would consider volunteering

Volunteering to work at a festival is a way for people to participate in the festival, if they, for instance, cannot afford a ticket or if they simply want to help organize the festival in addition to participating.

While **18%** of respondents in this survey have previously volunteered to work at a festival, as many as 50% say that they would consider doing it in the future. 4% have previously volunteered to work at a festival in the past and do not wish to do so again in the future, indicating that the majority of respondents who have experience volunteering at a festival, actually had a good experience while doing so:



30% of the respondents who have previously volunteered for a festival, has done so in a country abroad.

Almost twice as many Norwegians (32%), compared to the average, have previously volunteered to work at a festival, while the percentage amongst all other markets was very close to the average. Italian respondents were, however, the ones who had the lowest degree of previous volunteering, at 14%.

While 50% of the respondents, on average, said that they would consider volunteering at a festival in the future, there is a significant difference between how many respondents from each market who were willing to consider it. The most willing respondents were from France (59%), Spain (57%) and Great Britain (54%), while the markets with the least number of respondents willing to consider volunteering were The Netherlands (37%), Italy (38%) and Sweden (45%).

Especially the younger respondents were interested in volunteering in the future, which is likely, in part, due to a lower income amongst these respondents. 68% of respondents aged 18-25 said that they would consider volunteering in the future, while this percentage had dropped to 55% amongst respondents aged 26-35. For respondents older than 35, less than half of them would consider volunteering in the future. In other words, if Roskilde Festival wants to attract international volunteers in the future, it would make sense to focus specifically on trying to attract young volunteers from France, Spain or Great Britain.

A free festival ticket was the most important for willingness to volunteer

There are many aspects that can influence a person’s decision of whether or not to volunteer for a festival. Asking the respondents to rate a list of 9 aspects that could possibly influence their decision resulted in the scores in the graph on the right. All of these aspects were rated on a scale from 1 (not important at all) to 5 (very important) and represent the average score given to each aspect.

Interestingly, the social aspect of working with others at the festival is not a particularly strong motivation, compared to the others.

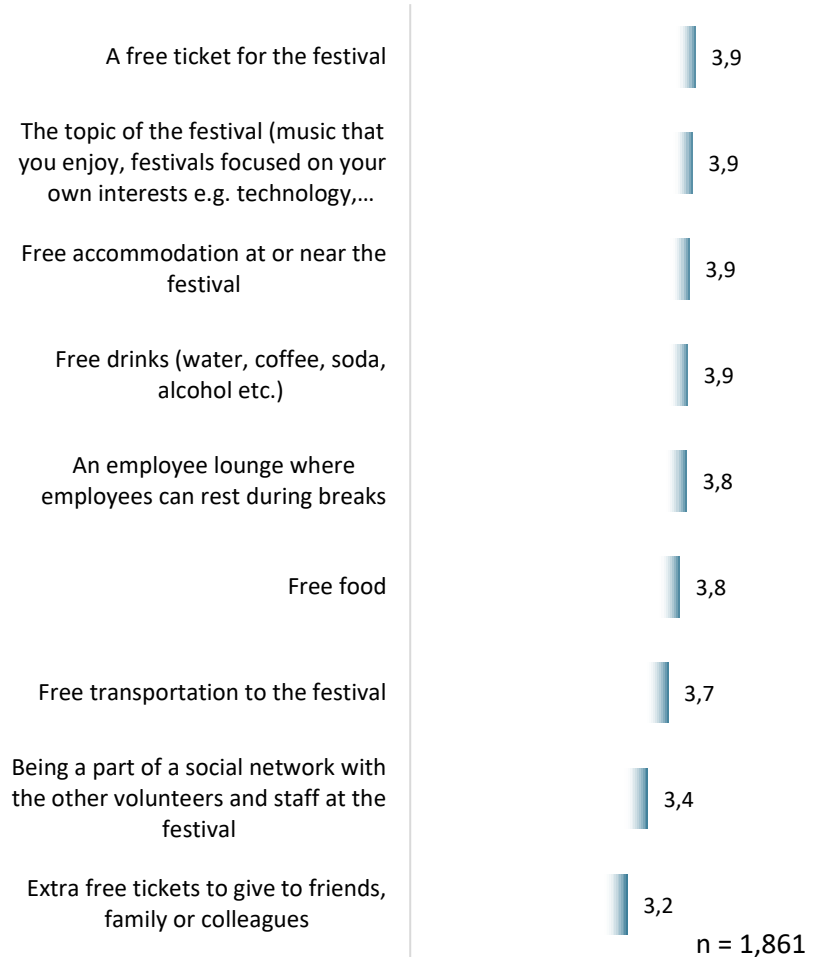
The topic of the festival was rated at 3.9, which has some interesting implications. While all of the respondents have shown a clear interest in music festivals, these following factors presumably also plays a role in the respondents’ decision-making process:

- ✓ Whether the music festival plays music that fits within one of the music genres that the respondents enjoy, as discussed in a previous section.
- ✓ Whether the selection of activities at the festival, such as art exhibitions, talks and sports events, are interesting to the respondent.

Pop and rock music were, by a significant margin, the most popular music genres chosen at 66% each, while the topics that the respondents showed the highest degree of interest in were:

1. Food/Cooking
2. Movies/Documentaries
3. Technology and innovation
4. Art
5. Sports

Roskilde Festival already has a large selection of food at the festival, including exotic dishes that participants likely have not tried before, as well as art exhibitions that fit with the theme of the year, such as sustainability or equality. Combining the music and art with new technology to create visual and audible art exhibitions could potentially be a way of further increasing interest from internationals.



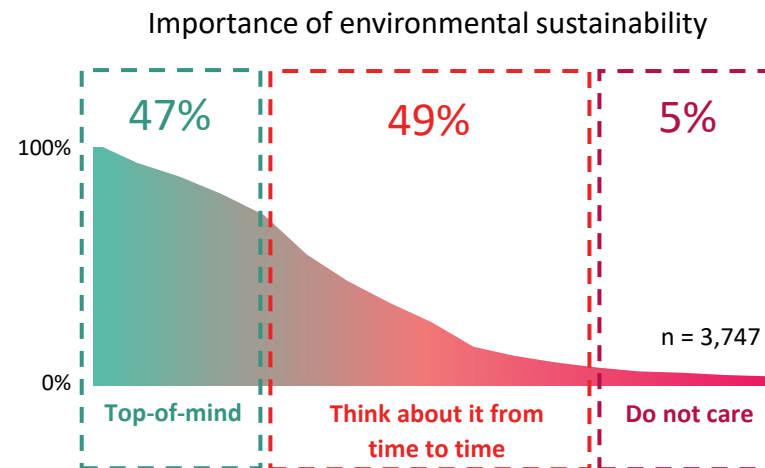
***To see which scores are significantly different from each other, please see the appendix on page 51-53.**

Environmental sustainability

Environmental sustainability was top-of-mind for almost half of respondents

Environmental sustainability is a topic that is discussed more and more in the world, with many companies putting a larger emphasis on both acting in an environmentally sustainable way and promoting their environmental sustainability in order to attract new customers to their business. Likewise, environmental sustainability is a topic that is heavily emphasized in Roskilde Festival, especially given the amount of trash that participants tend to leave behind when exiting the festival grounds at the end of the event. The question is, however, to what extent environmental sustainability is important to respondents.

This analysis covered various aspects of environmental sustainability, in order to thoroughly test the respondents' opinion of this topic. This was done by showing the respondents statements about environmental sustainability and asking them to choose whether they agreed or disagreed with each statement, on a 5-step scale. Four of these statements were related to whether environmental sustainability is top-of-mind amongst the respondents, including whether they actively think about the topic, whether they encourage others to do so as well and whether it bothers them if people and companies do not care about environmental sustainability. Calculating the average score that respondents gave to these four statements results in an overall measure of how close to top-of-mind the topic is for the respondents, which is illustrated in the graph on the right. More than half of the respondents have environmental sustainability very close to top-of-mind (average score above or equal to 4).



A few of the markets stand out in terms of no. of respondents with environmental sustainability as top-of-mind. A significantly larger percentage of Italian (64%), Spanish (55%) and French (52%) respondents had the topic as top-of-mind, compared to Dutch (29%) and Norwegian (40%) respondents who were significantly below the average.

This makes Italian, Spanish and French respondents prime candidates in terms of attracting participants to Roskilde Festival, who have a high focus on environmental sustainability, but there are other aspects to this topic. One thing is having the topic as top-of-mind, another is acting upon the topic, as shown on the following page.

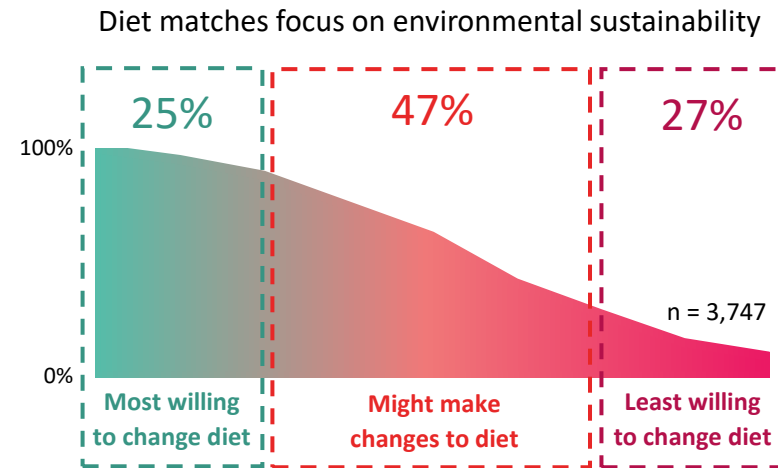
Low willingness to match diet choices with focus on environmental sustainability

While it is important to have environmental sustainability top-of-mind, it is of greater importance to actually act upon this awareness.

Certain eating habits have a lower negative impact on the environment than others. For instance, organically grown food is grown without the use of specific pesticides, which prevents those pesticides from leaking into the ground water. Another example is the fact that the production of meat has a higher environmental impact than the production of vegetables. The respondents were asked whether they actively limit their intake of meat as well as whether they usually eat organic food, both with the specific intent of minimizing the food productions' effect on the environment. The answers for these two questions were highly correlated and, as such, an average score was calculated to represent whether respondents actively change their dietary habits to accommodate for a focus on environmental sustainability.

An average score of 4 or above represents the respondents most willing to change their dietary habits to help protect the environment, while an average score of 2 or below represent the respondents least willing to change their dietary habits. This is visualized in the graph on the right.

On average, 25% of the respondents were in the group most willing to change their dietary habits to accommodate environmental concerns. Italian (36%), French (36%), German (32%) and Spanish (30%) respondents were, more than the average, willing to accommodate their diet for environmental concerns, while Norwegian (15%), Finnish (17%) and Dutch (18%) were the least likely to change their dietary habits.



High willingness to recycle trash

The last aspect of environmental sustainability analysed was the respondents' actions in terms of recycling, which was split into two parts. Firstly, to what degree the respondents sort their trash into different categories (glass, plastic, organics etc.). Secondly, whether they would consider picking up trash on the street and throwing it into a nearby trashcan, to help keep the area around them clean.

78% of the respondents agreed or strongly agreed that they sort their trash into categories. This was particularly popular amongst the Italian (84%), French (83%) and German (83%) respondents, while the Finnish (70%), Spanish (70%) and Norwegian (73%) respondents were less keen on sorting their trash.

When it comes to picking trash off of the street and throwing it in nearby trashcans to help keep the surrounding area clean, it was a less popular activity than sorting the respondents' own trash. 47% of the respondents agreed that they do it often, with Italian (57%), French (54%) and British (53%) respondents being more willing to help pick up other people's trash and Finnish (39%), Swedish (39%) and Dutch (40%) respondents being less keen on picking up other people's trash.

Interestingly, the only area of environmental sustainability where British respondents were significantly above the average, was in terms of picking up other people's trash off of the street.

Italian, French, Spanish and German respondents were the ones who were above average for most of the aspects surrounding environmental sustainability, which makes them the most potential markets from an environmental sustainability perspective.

Festivals actively working to improve environmental sustainability was important to respondents

When it comes to participating in a music festival, more than half of the respondents said that it is important that a festival actively works to improve the environmental sustainability both within the festival itself and in the surrounding society. Specifically:

- ✓ 65% of respondents said that it is important or very important that the festival works to improve environmental sustainability within the festival itself
- ✓ 69% of respondents said that it is important or very important that the festival works to improve environmental sustainability in the surrounding society

Furthermore, 37% of respondents said that they would still consider attending a festival if it does not work to improve environmental sustainability. 45% said that they might still consider attending, while 18% said that they would not consider attending the festival, if the festival did not work to improve environmental sustainability.

Italian (78%), French (77%), Spanish (72%) and British (70%) respondent put higher emphasis on the importance of working to improve environmental sustainability within the festival, while Norwegian (49%), Finnish (54%) and Dutch (56%) respondents did not think it was as important.

German (80%), Italian (79%), French (79%) and Spanish (73%) respondents put a higher emphasis on the importance of working to improve environmental sustainability in the surrounding society, while Norwegian (49%), Finnish (56%) and Dutch (64%) also put less emphasis on the importance of this aspect.

An alternative way of measuring the respondents' emphasis on environmental sustainability is to look at the markets with the highest percentage of respondents who would not participate in a music festival, if it did not actively work to improve environmental sustainability. Germany (23%), Spain (23%) and Great Britain (21%) were the only markets who had significantly more respondents, compared to the average, who said that they would not participate in a festival, if the festival did not actively work to improve environmental sustainability.



Social sustainability

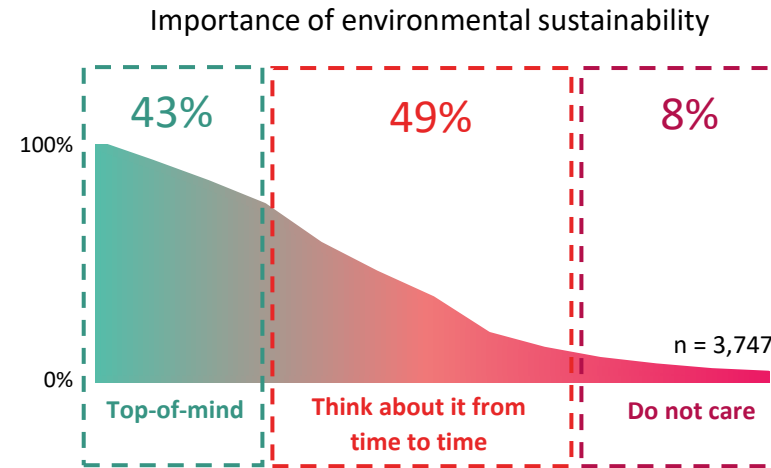
4 out of 10 respondents had social sustainability in top-of-mind

Social sustainability is, much like environmental sustainability, a topic that is often discussed and debated these days. More and more people and companies put a higher emphasis on working to improve social sustainability, and the companies who are leading this work in their sector, their country or globally can use this to promote and differentiate themselves from the competition.

Like the section above on environmental sustainability, the respondents were asked to choose whether they agree or disagree with a set of statements about social sustainability, on a scale from 1 (strongly disagree) to 5 (strongly agree). For social sustainability, a combined scale measuring whether social sustainability is top-of-mind for respondents was created by calculating the average score of 3 variables measuring:

- ✓ Whether respondents think about social sustainability often
- ✓ Whether respondents think that it is important that festivals work to improve social sustainability within the festival itself
- ✓ Whether respondents think that it is important that festivals work to improve social sustainability in the surrounding society

Significantly more Spanish (58%), Italian (57%) and French (55%) respondents had Social sustainability in their top-of-mind, by quite a large margin, while significantly less Norwegian (28%), Dutch (29%) and Finnish (31%) were significantly less likely to have social sustainability in their top-of-mind.



Note that the Spanish, Italian and French respondents were also the ones who were most likely to have environmental sustainability in their top-of-mind, which makes them ideal all-around candidates for targeted marketing campaigns, from a sustainability perspective.

Lastly, respondents were mostly neutral in terms of the importance of companies donating money to charity and focusing on social sustainability when it comes to making purchase decisions. That is, social sustainability is important for the respondents, but it does not seem to be what drives their purchase decisions.

Food preferences

Using food as a way to socialize

This section looks at the respondents' food preferences, as well as which aspects are most important to them when buying a meal at a music festival.

The graph on the right shows the percentage of respondents who agreed or strongly agreed with 4 different statements about food and dining. The main takeaway is that more than half of the respondents see dining as a chance to socialize and try new cuisines that they are not familiar with. This works to the benefit of festivals such as Roskilde Festival, given the inherent social context of music festivals as well as Roskilde Festival's strong focus on introducing food options that are new and experimental or simply uncommon during normal everyday life, such as bugs or horse meat.

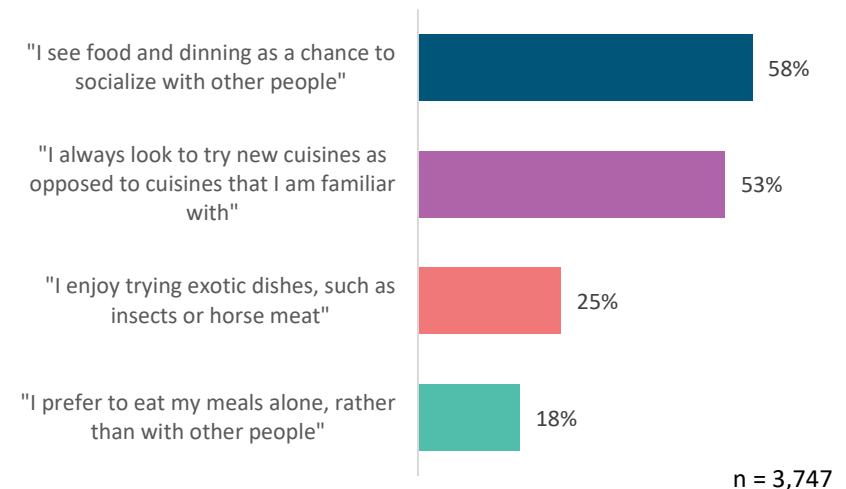
French (33%) and Finnish (29%) respondents were the most curious in terms of trying exotic foods, such as horse meat or bugs, while Dutch (15%) and Swedish (18%) respondents were more reserved and preferred to eat more familiar food.

The statement about dining as a chance to socialize was quite divisive amongst the markets. Spanish (69%), Italian (67%), British (66%) and Swedish (65%) respondents put significantly higher emphasis on using dinners as opportunities to socialize, while Dutch (32%) and French (48%) respondents were not as keen on socializing while having dinner.

Lastly, German (62%), French (60%) and Spanish (58%) respondents were the most interested in experiencing new cuisines that they were not already familiar with, while Finnish (43%), Dutch (47%) and

Swedish (49%) respondents were less keen on trying out new cuisines, than the average respondent.

Agrees or strongly agrees with the following statements about food



Quality and price were most important for choice of food stall

Another important aspect of designing a food experience that matches the preferences of the international respondents, is to find out which aspects that they look for, when they are in the situation of having to decide between different food options at a music festival such as Roskilde Festival.

Respondents picked the three most important aspects that they look for when choosing a food stall at a music festival, out of a list of six different aspect. Unsurprisingly, the aspects related to convenience (quality, price, time and amount) ranked the highest.

Especially the Italian (87%) and the Dutch (85%) respondents were keen on the quality of the food being high, while Swedish (75%) and Norwegian (76%) respondents do not seem to have quite as high expectations as the average respondent.

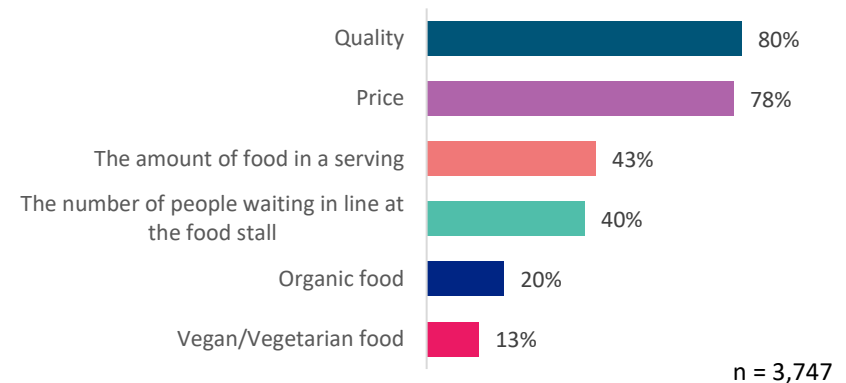
Most of the markets agreed on price being very important, although Swedish (71%) respondents were slightly less price sensitive than the other respondents.

No significant difference was found between the markets in terms of the importance of the amount of food served, but there was, however, a significant difference in which markets were willing to wait in line longer than others. Norwegian (49%), British (47%) and Finnish (46%) respondents were the least willing to wait in line, while Dutch (32%), French (32%) and Italian (36%) respondents did not mind as much.

Organic food was only chosen as one of the top 3 most important aspects by 20% of the respondents, but some markets did put a higher emphasis on the importance of this aspect than others. Italian (30%), French (28%) and Swedish (24%) respondents put a higher emphasis on the importance of organic food, while British (13%) respondents put the importance significantly lower than the average.

German (19%) and Swedish (19%) respondents put a much higher emphasis on the importance of vegan/vegetarian food than most respondents, while Norwegian (9%) respondents were the only ones to rate the importance significantly below the average.

Top 3 most important aspects when selecting a food stall at a music festival



Accommodation and willingness to commute

A nearby hotel or hostel was the most preferred type of accommodation

This final section looks at the respondents' preferences for accommodation and travel during their participation in music festivals.

The most common form of accommodation used during the Roskilde Festival is a tent on the festival grounds, but this was, surprisingly, only the preferred accommodation for 18% of the respondents. A significantly larger percentage would, instead, prefer to stay at a nearby hotel or hostel:

- ✓ **A nearby hotel or hostel: 56%**
- ✓ **A tent on the festival grounds: 18%**
- ✓ **A nearby rental property (e.g. Airbnb): 15%**
- ✓ **Would only attend festivals that are close enough to their home, to be able to sleep at home at night: 8%**
- ✓ **Other types of accommodation: 3%**

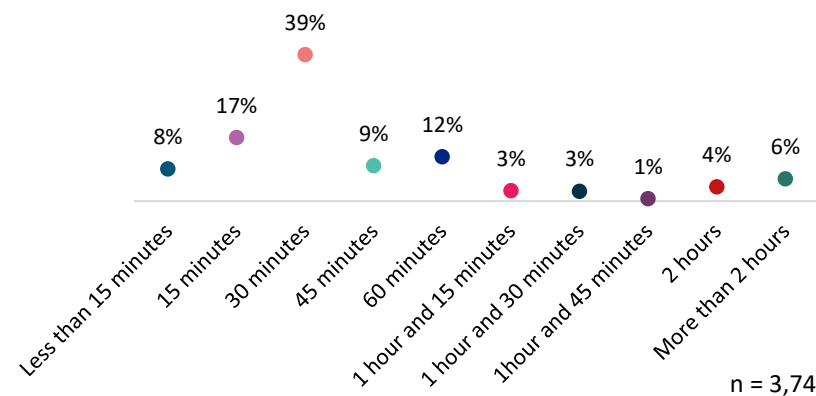
While the overall preferences were the same across the different markets, some markets were more or less willing to try other forms of accommodation apart from a hotel/hostel. Significantly more Finnish (73%), Swedish (68%) and Norwegian (66%) respondents preferred to stay in a hotel/hostel, compared to the average, while significantly more British (34%), German (29%) and Spanish (22%) preferred to stay in a tent on the festival grounds. Lastly, significantly more Italian (27%) and French (22%) preferred to stay in a nearby Airbnb. Surprisingly, more than twice the average of Dutch (17%) respondents said that they would only participate in a festival, if it was close enough to their home, for them to be able to sleep at home every day.

Respondents were, on average, willing to spent 30 minutes traveling from their accommodation to a music festival

When the respondents say that they would prefer to stay at a nearby hotel/hostel or in a nearby Airbnb, it is important to know what their idea of "nearby" is, since this could be very different distances depending on the person asked.

64% of the respondents were willing to travel a maximum of 30 minutes between their place of accommodation and the festival grounds, which limits their place of accommodation to areas in and around the city of Roskilde. According to rejseplanen.dk, it takes about 54 minutes to travel from the Copenhagen Central Station to the train station nearest to Roskilde Festival, which means that about 27% of the respondents would be able to stay in Copenhagen, given their travel preferences:

Willingness to commute (time)



Appendix

| Pair | Mean difference | Variable 1 | Variable 2 | Significant difference between variable means? |
|---------|-----------------|--|--|--|
| Pair 1 | -0.02 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | A free ticket for the festival | No |
| Pair 2 | 0.14 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | Free food | Yes |
| Pair 3 | 0.05 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | Free drinks (water, coffee, soda, alcohol etc.) | No |
| Pair 4 | 0.07 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | An employee lounge where employees can rest during breaks | No |
| Pair 5 | 0.26 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | Free transportation to the festival | Yes |
| Pair 6 | 0.04 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | Free accommodation at or near the festival | No |
| Pair 7 | 0.67 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | Extra free tickets to give to friends, family or colleagues | Yes |
| Pair 8 | 0.47 | The topic of the festival (music that you enjoy, festivals focused on your own interests e.g. technology, movies, art) | Being a part of a social network with the other volunteers and staff at the festival | Yes |
| Pair 9 | 0.16 | A free ticket for the festival | Free food | Yes |
| Pair 10 | 0.08 | A free ticket for the festival | Free drinks (water, coffee, soda, alcohol etc.) | No |
| Pair 11 | 0.09 | A free ticket for the festival | An employee lounge where employees can rest during breaks | No |

| Pair | Mean difference | Variable 1 | Variable 2 | Significant difference between variable means? |
|---------|-----------------|---|--|--|
| Pair 12 | 0.28 | A free ticket for the festival | Free transportation to the festival | Yes |
| Pair 13 | 0.06 | A free ticket for the festival | Free accommodation at or near the festival | No |
| Pair 14 | 0.70 | A free ticket for the festival | Extra free tickets to give to friends, family or colleagues | Yes |
| Pair 15 | 0.49 | A free ticket for the festival | Being a part of a social network with the other volunteers and staff at the festival | Yes |
| Pair 16 | -0.08 | Free food | Free drinks (water, coffee, soda, alcohol etc.) | Yes |
| Pair 17 | -0.07 | Free food | An employee lounge where employees can rest during breaks | No |
| Pair 18 | 0.12 | Free food | Free transportation to the festival | Yes |
| Pair 19 | -0.10 | Free food | Free accommodation at or near the festival | No |
| Pair 20 | 0.54 | Free food | Extra free tickets to give to friends, family or colleagues | Yes |
| Pair 21 | 0.33 | Free food | Being a part of a social network with the other volunteers and staff at the festival | Yes |
| Pair 22 | 0.01 | Free drinks (water, coffee, soda, alcohol etc.) | An employee lounge where employees can rest during breaks | No |
| Pair 23 | 0.20 | Free drinks (water, coffee, soda, alcohol etc.) | Free transportation to the festival | Yes |
| Pair 24 | -0.02 | Free drinks (water, coffee, soda, alcohol etc.) | Free accommodation at or near the festival | No |
| Pair 25 | 0.62 | Free drinks (water, coffee, soda, alcohol etc.) | Extra free tickets to give to friends, family or colleagues | Yes |
| Pair 26 | 0.41 | Free drinks (water, coffee, soda, alcohol etc.) | Being a part of a social network with the other volunteers and staff at the festival | Yes |
| Pair 27 | 0.19 | An employee lounge where employees can rest during breaks | Free transportation to the festival | Yes |
| Pair 28 | -0.03 | An employee lounge where employees can rest during breaks | Free accommodation at or near the festival | No |
| Pair 29 | 0.61 | An employee lounge where employees can rest during breaks | Extra free tickets to give to friends, family or colleagues | Yes |

| Pair | Mean difference | Variable 1 | Variable 2 | Significant difference between variable means? |
|---------|-----------------|---|--|--|
| Pair 30 | 0.40 | An employee lounge where employees can rest during breaks | Being a part of a social network with the other volunteers and staff at the festival | Yes |
| Pair 31 | -0.22 | Free transportation to the festival | Free accommodation at or near the festival | Yes |
| Pair 32 | 0.42 | Free transportation to the festival | Extra free tickets to give to friends, family or colleagues | Yes |
| Pair 33 | 0.21 | Free transportation to the festival | Being a part of a social network with the other volunteers and staff at the festival | Yes |
| Pair 34 | 0.64 | Free accommodation at or near the festival | Extra free tickets to give to friends, family or colleagues | Yes |
| Pair 35 | 0.43 | Free accommodation at or near the festival | Being a part of a social network with the other volunteers and staff at the festival | Yes |
| Pair 36 | -0.21 | Extra free tickets to give to friends, family or colleagues | Being a part of a social network with the other volunteers and staff at the festival | Yes |

Talkwalker analysis

Roskilde Festival's social media presence

In addition to the survey, a historic search for social media content relating to Roskilde Festival was conducted through the Talkwalker system, which aggregates historic data about social media activity relating to specific topics or hashtags. This section presents the findings from this social media analysis.

Roskilde Festival has a fairly short list that they use, which makes it fairly easy to do a historic search for content. The hashtags included in this search were:

- ✓ **#RoskildeFestival**
- ✓ **#RF19**
- ✓ **#RF18**
- ✓ **#RF17**
- ✓ **#OrangeFeeling**
- ✓ **#RoskildeDonations**

Note that the search ignores capitalization, which means that all kinds of different capitalizations were included, such as #RF18 and #rf18.

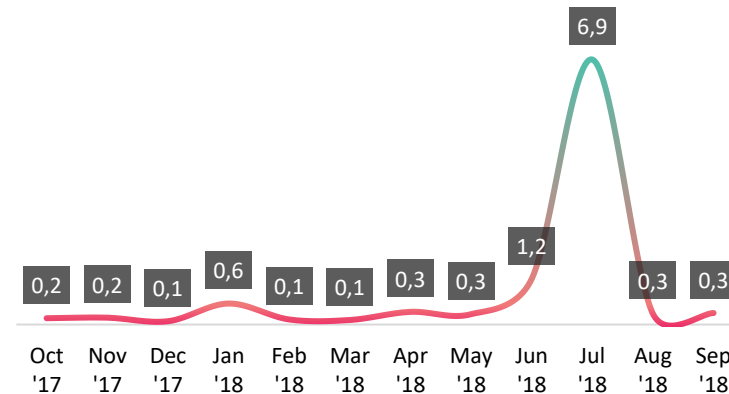
An important limitation for this segment of the analysis, is the social media platforms included in the historic search. Only results from Instagram and Twitter were included in the search, due to recent changes in Facebook policy, which limits search results to public pages only, which would not be representative of the actual users.

Furthermore, several key words were used to ensure that only results about Roskilde Festival was included in the search, since some of the hashtags, such as #RF18 is not exclusively used by Roskilde Festival, but is also used in unrelated posts. As such, there will be a difference in the number of posts displayed, using a given hashtag, when

searching online compared to the number of posts mentioned in this analysis specifically.

Another limitation for this social media analysis was that it was only possible to go back one year, which was, unfortunately, not a long enough time period to be able to compare data from both Roskilde Festival 2017 and 2018. This is especially unfortunate because the social media activity relating to the hashtags that Roskilde Festival uses is very seasonal with heavy activity around the time of the festival and very low activity during the rest of the year, as shown below:

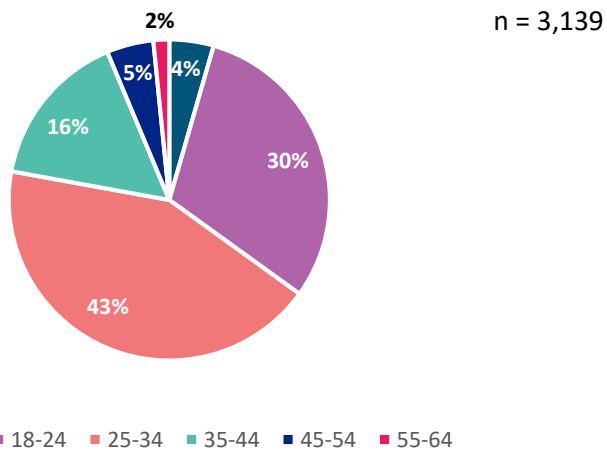
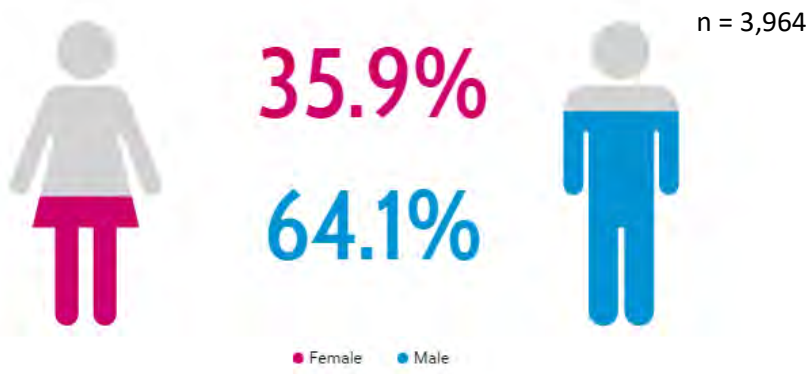
Social media posts during each month (000's)



The social media users were fairly active, comparatively, in the month of June as well, which is the month leading up to the start of Roskilde Festival, but other than that the activity was fairly low and during the rest of the year.

In total, 10,548 posts were made using the Roskilde Festival hashtags within the period (October 2017 to September 2018).

Not all posters have their age and gender as publicly available information associated with their social media accounts. Age data was available for a total of 3,139 accounts, while gender data was available for a total of 3,964 accounts:



The following two pages includes two word-clouds. The first word-cloud shows the most used individual words used by users on the two social media accounts while using one of Roskilde Festival's hashtags. The second word-cloud shows the most popular hashtags used in combination with one or more of Roskilde Festival's hashtags. The size of the words/hashtags in the word-clouds signify the percentage of posts that included the given word or hashtag. That is, the larger a given word/hashtag is in the pictures on the two following pages, the more posts included that particular word/hashtag.

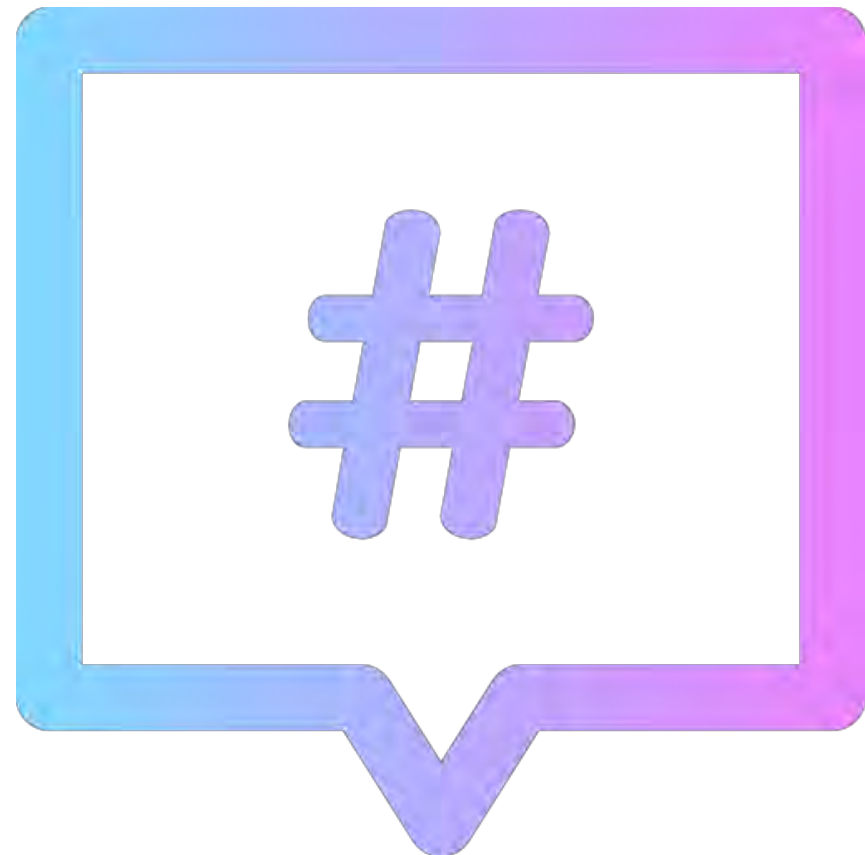
As a reference:

- ✓ **#RoskildeFestival was used in 70% of posts**
- ✓ **#RF18 was used in 55% of posts**
- ✓ **#OrangeFeeling was used in 10% of posts**
- ✓ **#RoskildeFestival2018 was used in 6% of posts**
- ✓ **#RF17 was used in 2% of posts**
- ✓ **#Roskilde2018 was used in 2% of posts**

One of the key findings here is the importance of the festival's main act for the year. In 2018 the headline artist performing at the festival was Eminem, who was mentioned in 16% of posts using the hashtags #Eminem (11%) and #RevivalTour (4%).

If Roskilde Festival was looking for new hashtags to use, these word-clouds would be a good source of inspiration, however, the majority of the hashtags used are very general and do not relate specifically to either Roskilde Festival or music festivals, which would make it difficult, if not impossible, to convert these hashtags into ones that were specifically associated with the promotion of Roskilde Festival.

Roskilde Festival could, however, consider using some of the hashtags associated with the more popular artists performing at a given year's festival, to draw attention to Roskilde Festival from a wide group of the artist's fans, which could potentially lead to more international participants.



THEMES

1 word



HASHTAGS

#dualipa #guitar #rapgod #music #slimshady #rfgraff #rap #travel #people #musiclover
 #nofilter #sunset #beautiful #friends #roskilde2018 #music #festivallife #musiclover
 #rocknroll #Lindegarden #orangescene #musicfestival #photooftheday #camping #tbt
 #rf17 #festivalfashion #24KMagicWorldTour #livemusicphotography #RevivalTour #instamusic
 #dreamcity #brunomars #concertphotography #festival #denmark #summer #Amourcratica #sun #dkpol
 #food #streetart #eminem #concert #summer #love #party #ros18
 #beer #canon #rock #live #roskildefestival #love #party #ros18
 #odense #live #roskildefestival2018 #rf18 #roskilde #danmark #hiphop
 #goodtimes #picoftheday #orange #orange #instagood #tuborg
 #roskildefestival18 #EveryHooligansDream #RevivalEuropeanTour #musicphotography #orange #graffiti
 #smile #festivals #photography #copenhagen #festivalseason #visitdenmark #orangestage
 #fashion #københavn #gorillaz #visitcopenhagen #marshallmathers #livemusic #art #happy #drinks
 #festivaloutfit #visitroskilde #life #StillDreamin #Fakta #stage
 #danish #rf2018 #aarhus #PPW #koncert

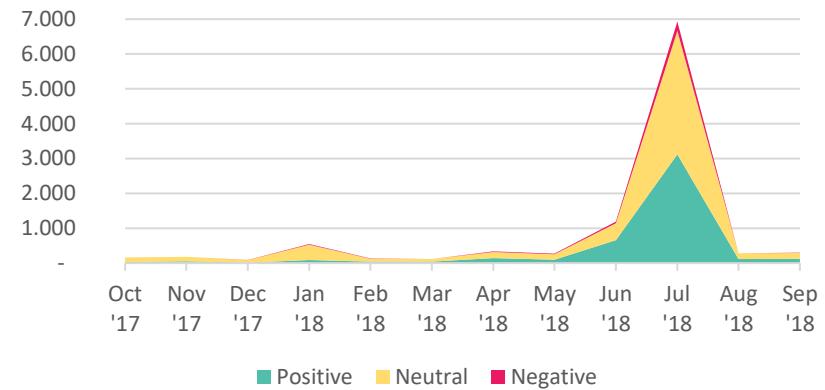
Lastly, the Talkwalker analysis included a sentiment analysis which splits the social media posts into three categories:

- ✓ Positive
- ✓ Neutral
- ✓ Negative

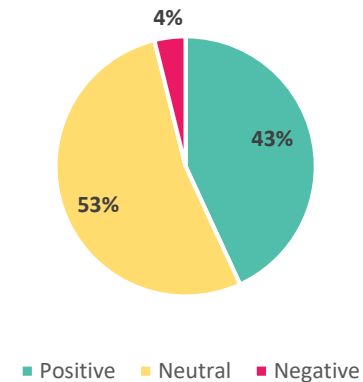
This form of analysis is usually based around machine learning, where a set of initial assumptions are made to differentiate between positive, neutral and negative posts, which are then fed into an algorithm that will, over time, learn to make more advanced categorisations of posts. That is, as more and more posts are categorized, the algorithm will find more and more patterns between words in the collected data, which will then be used to further enhance the future categorization of posts.

Due to the nature of sentiment analysis, these results should simply be viewed as an estimate for the general sentiment surrounding posts using the Roskilde Festival hashtags, as opposed to a factual result on sentiment. They can, for instance, be used to indicate that the percentage of negative posts is vastly smaller than the percentage of positive or neutral posts. It is, however, not possible to say whether the difference between the percentage of positive and neutral posts is significant. A realistic interpretation of the sentiment analysis results would allow for a margin of error, due to the fact the analysis is, in part, based on assumptions made by the designers of the algorithm. While it is not possible to say how large this margin of error should be, an initial assumption of around +/- 10-15% will likely give a more reasonable interpretation of the results.

of posts by sentiment category



PCT. of posts by sentiment category



n = 10,566

For inquiries about this report please contact Analyst Mike Wedel Hansen at mha@woco.dk



WONDERFUL
COPENHAGEN

