

A New Normal?

Deep dive into audience trends

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Methodology

This reports gives a representative indication of the attitudes, behaviours and current thinking of live music fans in the UK.

The nationally representative survey was carried out by Opinium. 2,000 responses were collected from the UK in November 2023.

This is further to data collected in April 2023, as well as Nov 2022 and May 2022. The four wave trend data captures those key data points asked in the same way over the 18-month period.



The Fourth Wave



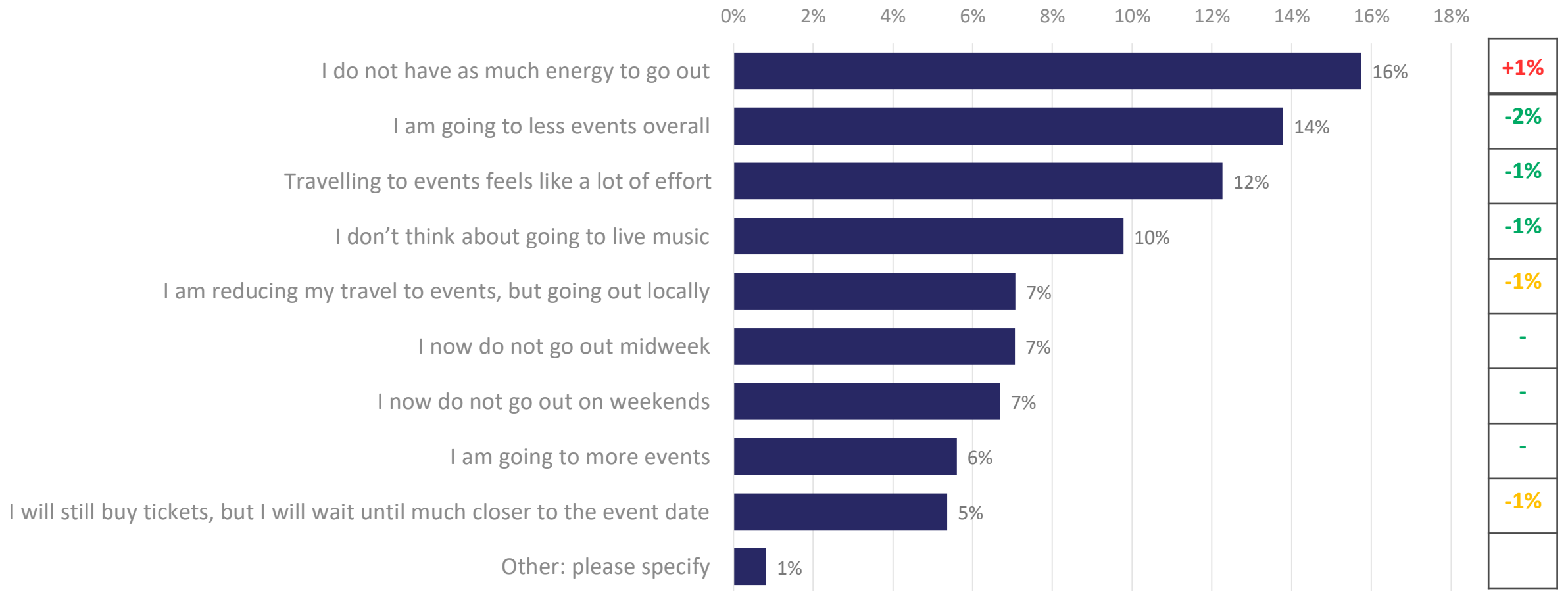
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Nov 2023: A new normal might be bedding in

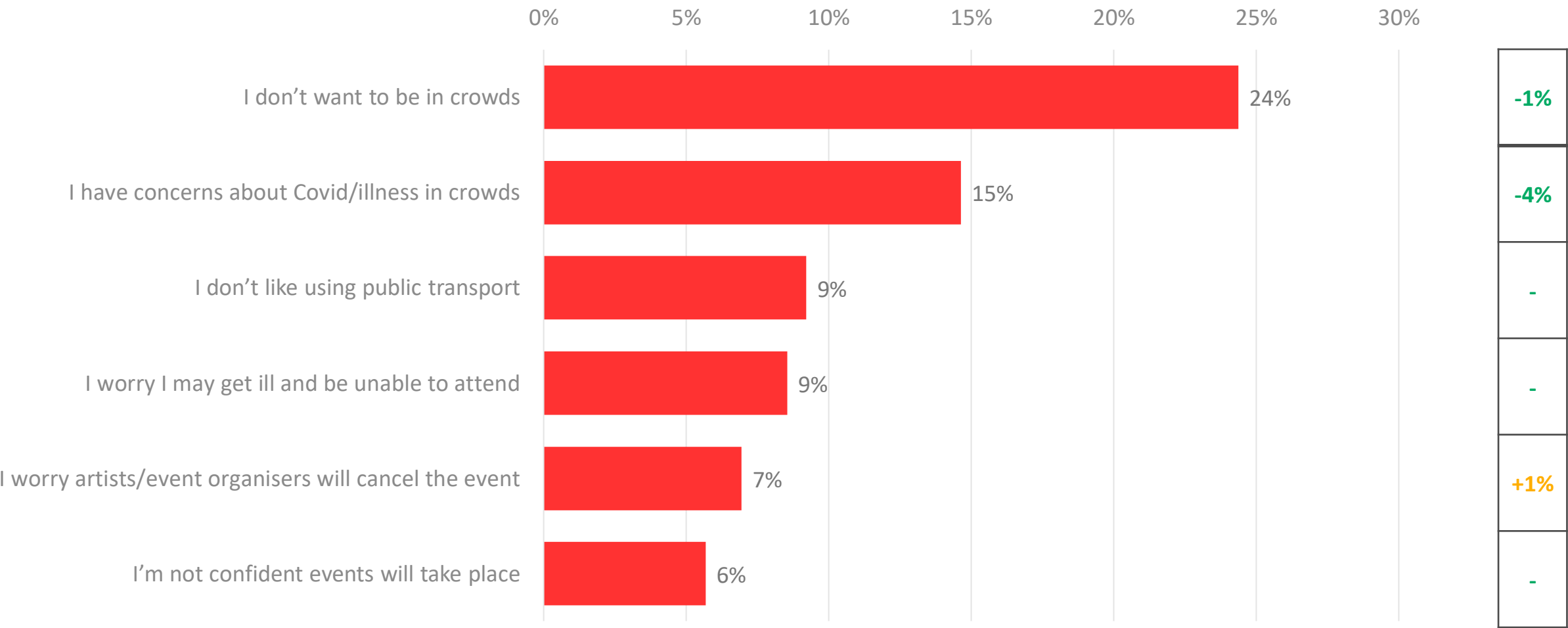
- **Concerns about illness in crowds fall.** While 15% still have some concerns, that's near half the 28% in May '22
- **Financial pressures are present but easing slightly:** 16% report having less disposable income than before, vs 18% 6m ago
- **Concerns about refunds have fallen** to 7% vs 9% six months ago and 11% back in May 2022
- **25-34 year old demographic are a complex target:** they are waiting longer to buy, confident of getting tickets, but also most concerned about the total costs of events
- **Once at events, the experience is still challenging,** with 36% believing that other people have forgotten how to behave in crowds
- **Fundamentally, people love live music,** just 10% now say they do not think about going to gigs v 15% in May 22.



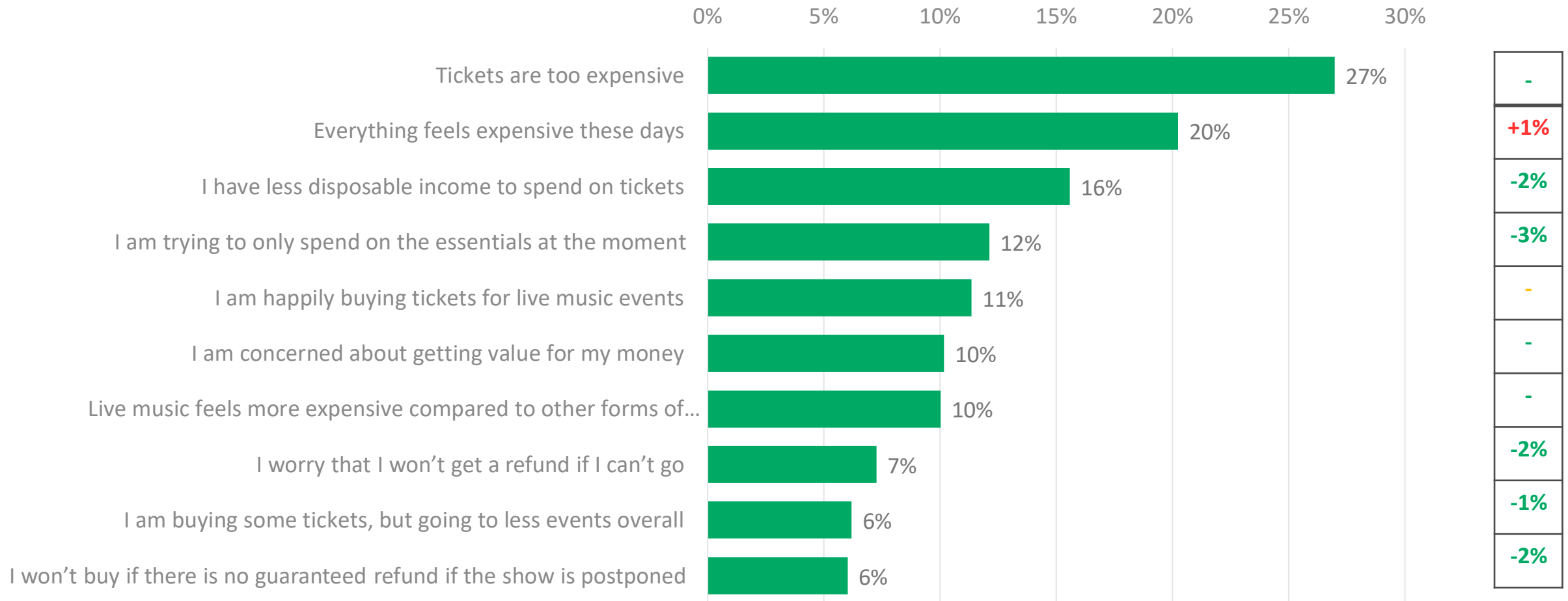
Have we reached the new normal?



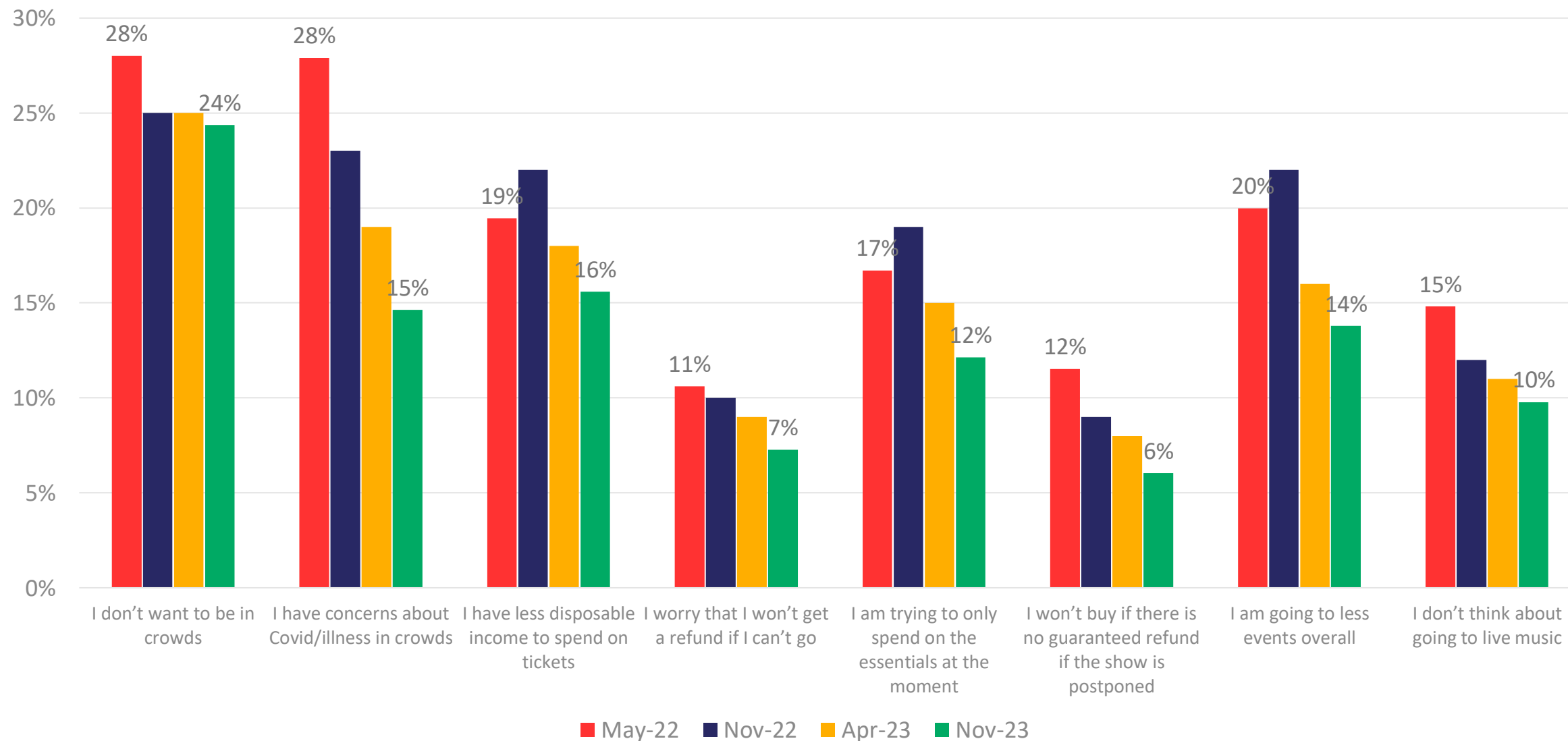
Covid concerns are easing overall



Ticket buying has improved slightly



Trend of key metrics

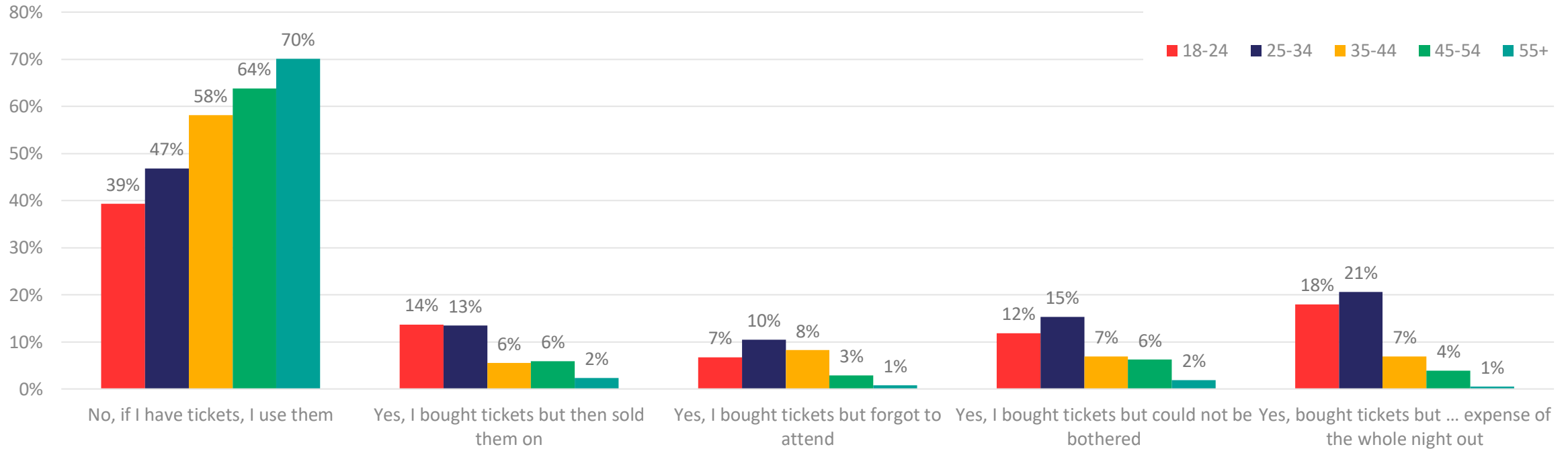


Late Buying



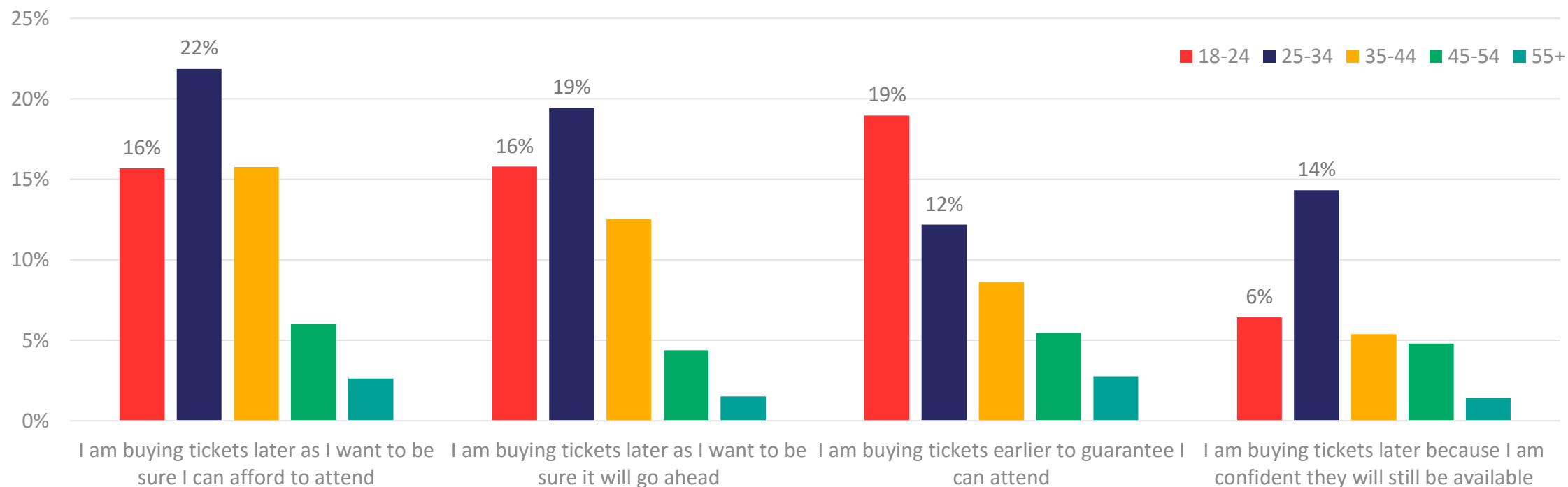
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Ticket Usage: multiple factors still influencing whether people use their ticket



- Headline number improved strongly (from 39% always using tickets up to 70%)
- Underlying factors still significant for certain demographics
 - Bought and sold on: 14% 18-34 just 1% 55+, Wales 14%, London 10%, 19% Electronic
 - Forgot: 9% 18-34 just 1% 55+, Wales 10%, Metal 13%
 - Not bothered: 14% 18-34 just 2% 55+, Wales 14%, London 12%, Folk 17%
 - Too expensive: 7%, with 20% 18-34 vs 1% 55+, Wales 18%, Metal 18%

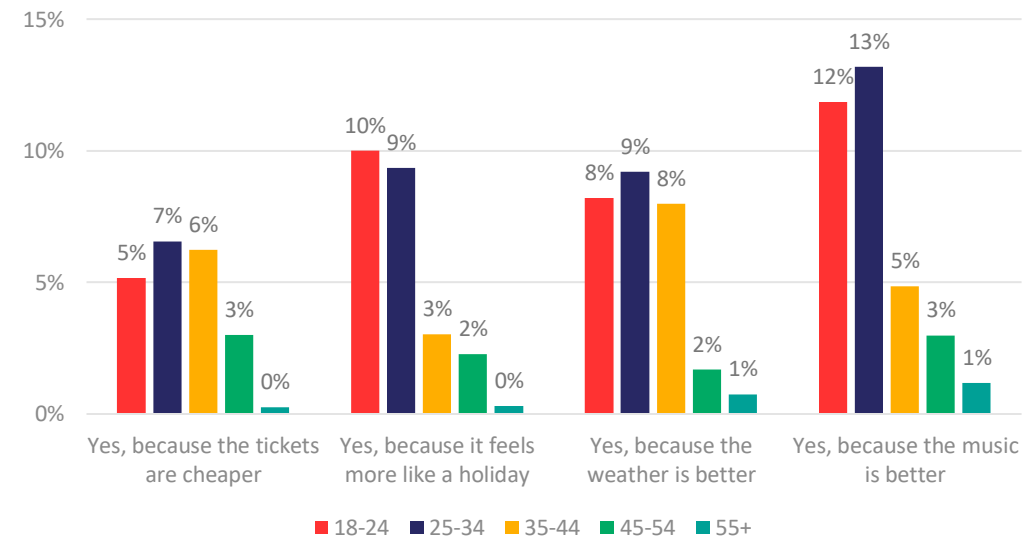
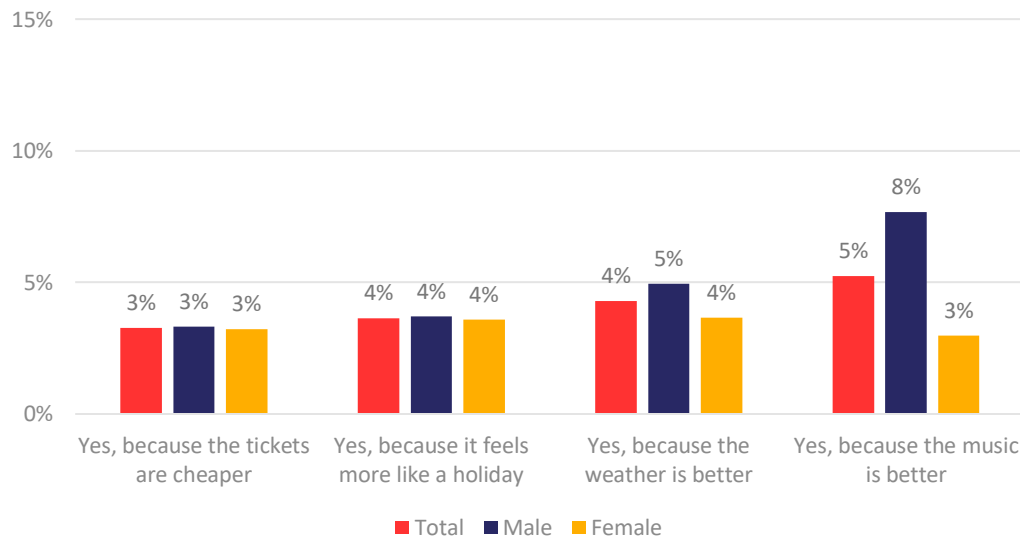
Later Purchasing: 25-34's complex and hard to reach



- 32% say their approach has not changed suggesting new habits are locking into place
- 25-34's are hardest to reach, biggest concerns about affording the event, and greatest confidence they can get tickets later. The concern about events taking place also impacts them (19% and 18-24 16%) most.
- Digging into reasons for later purchase highlights
 - 5% confident tickets will be available, 11% 18-34 just 1% 55+, Wales 13%, London 10%, 39% Electronic
 - 10% delay until sure can afford, 19% 18-34 just 3% 55+, Wales 20%, Electronic 26%
 - 8% wait until sure event is happening, 18% 18-34 just 2% 55+, Wales 21%, Folk 20%

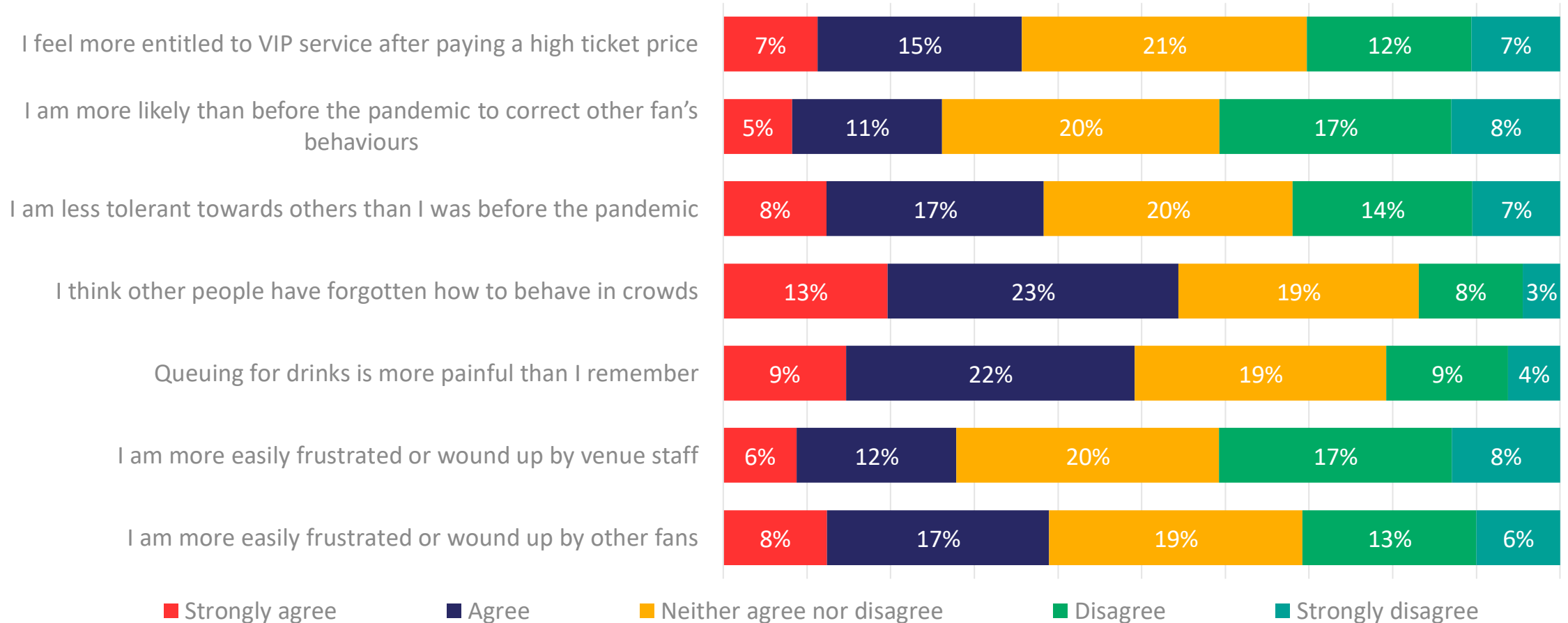
Overseas Festivals: still a minority pursuit but of clear interest to the young

*In response to discussions that a combination of weather, line up and cost factors might be making overseas festivals an increasingly attractive alternative to UK based events we asked: **Are you planning to travel overseas to a music festival next year (2024)?***

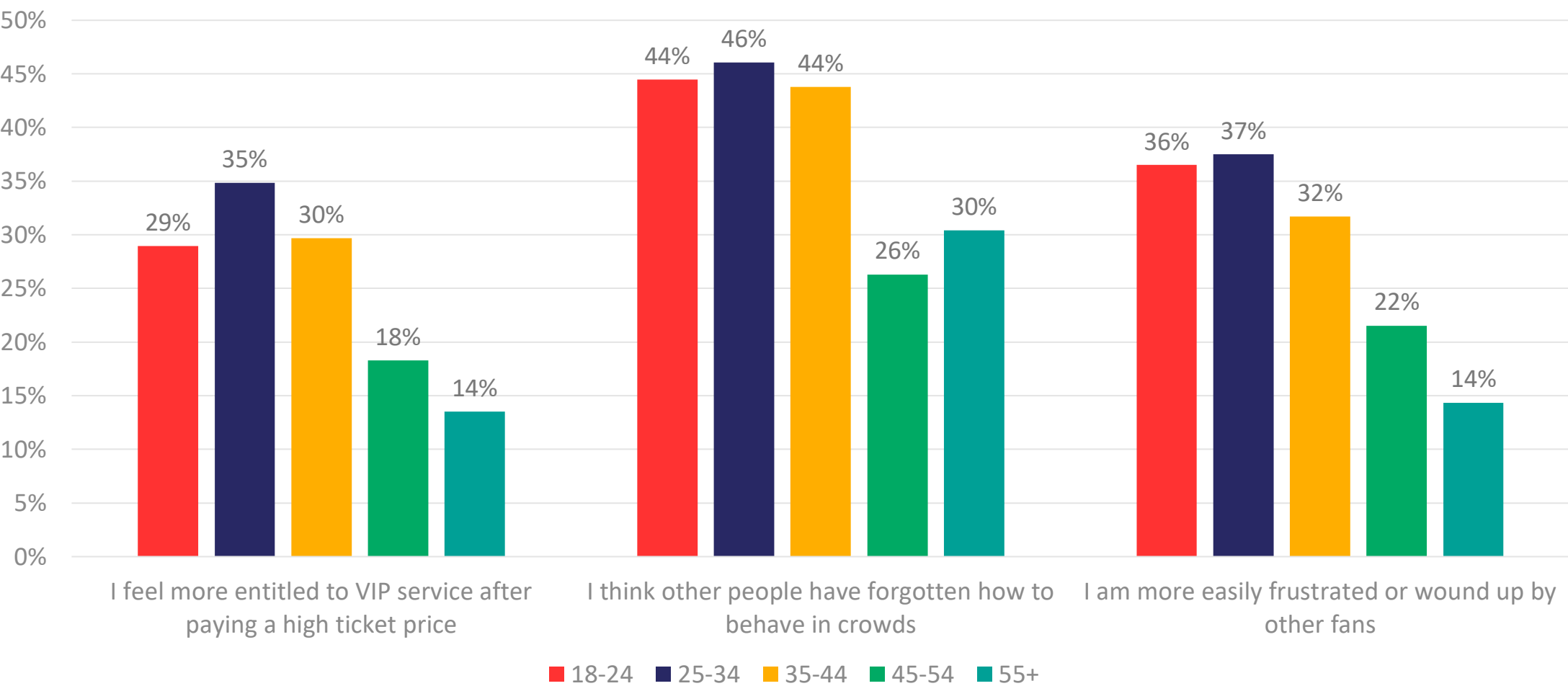


- Overall, just 16% are planning to attend an overseas festival, but rises to 29% in Wales and 36% for House/Electronic fans
- Most interesting takeaway is the huge age disparity with 37% 18-34s intending to travel but just 2% 55+
- Taken together it suggests DJ-led festivals aimed at 18-34s are most likely to attract a UK audience

Fans are more sensitive than previously



Audience Behaviour: Regional/Genre Variations but Age a consistent factor



Audience Behaviour: Regional/Genre Variations but Age a consistent factor

In light of ongoing reports of atypical and sometimes challenging audience behaviour, LIVE used this wave of research to ask the public about their behaviour, expectations and the behaviour of others.

- In terms of their own expectations and experience:
 - 22% agree that **higher ticket prices bring increased expectations**
 - Rises to 37% in Wales and 35% for Country and Hip Hop fans
 - Younger demographics more likely to agree 33% 18-34 but just 14% 55+
 - 31% feel **queuing for drinks has become more painful** than they remember
 - Rises to 38% in N. Ireland and 49% of Electronic/House fans
 - Again younger demographics have more pronounced feelings 41% 18-24 down to 23% 55+
 - Just 18% agree they are **more easily wound up by venue staff**
 - Rises to 26% in London and 33% of Metal fans
 - Again younger demographic much more likely to agree 30% 18-34 down to 9% 55+

Audience Behaviour: Regional/Genre Variations but Age a consistent factor

A sense that the behaviour of others has declined is increasing levels of frustration and intolerance and a likelihood for some to intervene.

- 36% agree that **other people have forgotten how to behave in crowds**
 - Rises to 43% in London and 50% for Country and Metal fans
 - Younger demographics more likely to agree 45% for 18-34's, falling to 30% for 55+
- 25% feel **less tolerant towards others** than I was before the pandemic
 - Rises to 33% in London and 37% of Country fans
 - Again younger demographics have more pronounced feelings 34% 18-34 down to 19% 55+
- 25% are **more easily frustrated or wound up by other fans**
 - Rises to 31% in London and 44% of House fans (43% Metal)
 - Marked difference by age: 37% 18-34 down to 14% 55+
- 16% **more likely to correct other fans' behaviour**
 - South East least likely (10%) Hip Hop most likely 29%
 - Marked difference by age: 33% 18-24 down to 6% 55+

Conclusions



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- Having tracked post-pandemic sentiment for 2 years now, we are confident that the Covid factors that kept crowds away have now normalised.
 - In our 3rd wave (April) factors eased and now (Nov '23) all have improved or stayed consistent.
- However, the financial situation remains a significant barrier.
 - It is not worsening (unlike in comparable data 12 months ago) but remains a key consideration for ticket buyers.
- Late purchasing looks to be here to stay, but the picture is not straight forward.
 - Top shows sell out at breakneck speed, but aside from those smash hit shows consumers are happy to wait longer.
 - Encouragingly, 18-24s are most likely to rush to purchase tickets for fear of missing out, but the lucrative 25–34s are waiting later for financial reasons with 18% sure they'll still get a ticket.
- Once inside the venue, the changing audience expectations are most apparent in younger demographics.
 - 18-35s are most likely to expect VIP treatment after paying high prices, they are more easily would up by other fans, and most likely to believe that other people have forgotten how to behave.

Thank you.
For questions and data
requests jon@livemusic.biz