


LIVE NATION

POWER OF LIVE





COVID-19 SILENCED
THE STAGE, BUT THE
INDUSTRY REMAINED
RESILIENT

THE BOUNCE BACK

Fans eagerly anticipated the return of live events, and now, immersed in a thriving industry, they make up for lost time, reconnect with real emotions, and embrace the magic of shared experiences once again.



FAN DEMAND FOR
CONCERTS CONTINUES HITTING

RECORD LEVELS



ATTENDANCE

ACROSS ALL VENUE TYPES

↑ 40%



FAN SPEND

ANCILLARY INCLUDING ONSITE

↑ 20%+



TICKET SALES

VIA TICKETMASTER

↑ 33%



SPONSORSHIP

DRIVEN BY FESTIVALS + GLOBAL GROWTH

↑ 59%

WE TALK TO FANS WHEN THEY'RE TRULY LISTENING

The emotional intensity is unmatched and the moments are more memorable. That means audiences are more receptive and your message has more meaning.

AWARENESS	88%	of fans notice and appreciate what sponsors provide to their fan experience at events
RELEVANCE	75%	of fans agree that sponsorship makes a brand more relevant for them
PURCHASE	74%	of fans agree they are more likely to purchase products or services from companies that sponsor events they attend
LOYALTY	62%	of fans feel more connected to brands that sponsor events they attend

97%

OF FANS

agree nothing compares to the excitement of being at a live music event





THE POWER OF LIVE

90%

of live music fans believe brands enhance the live experience

63%

say they are more likely to connect with brands while in the highly emotional environment of live entertainment

62%

Of those surveyed say brands are a “valued part of the festival experience”

2/3

are more likely to use / purchase from brands who sponsor music events

79%

Of global live-music-goers agree that the experience extends well beyond the actual event

51%

feel more favourably towards brands that sponsor festivals

Live Nation is invested in understanding what motivates people to come to our events and where brands can enhance the experience along the way.



1600

As part of a recent research study, we heard from over 1,600 music fans to learn more about their journeys across festivals and concerts.

“Whenever I think of my happiest times, live music has always been involved”

JORDAN



THE LIVE MUSIC EXPERIENCE IS MUCH MORE THAN A MOMENT

IT'S A JOURNEY

The live music fan experience exists long before an artist takes the stage and resonates as long as a lifetime afterwards

7/10

say that part of the experience is preparing for the event beforehand and reliving it afterwards



FANS EXPECT BRANDS TO

BE A PART OF THE JOURNEY

They want the **comfort** and **familiarity** that brands provide but also the **surprise** and **delight** beyond artists and stages.



3/5

are more **open to ideas** and **products** when they are at live music events

3/5

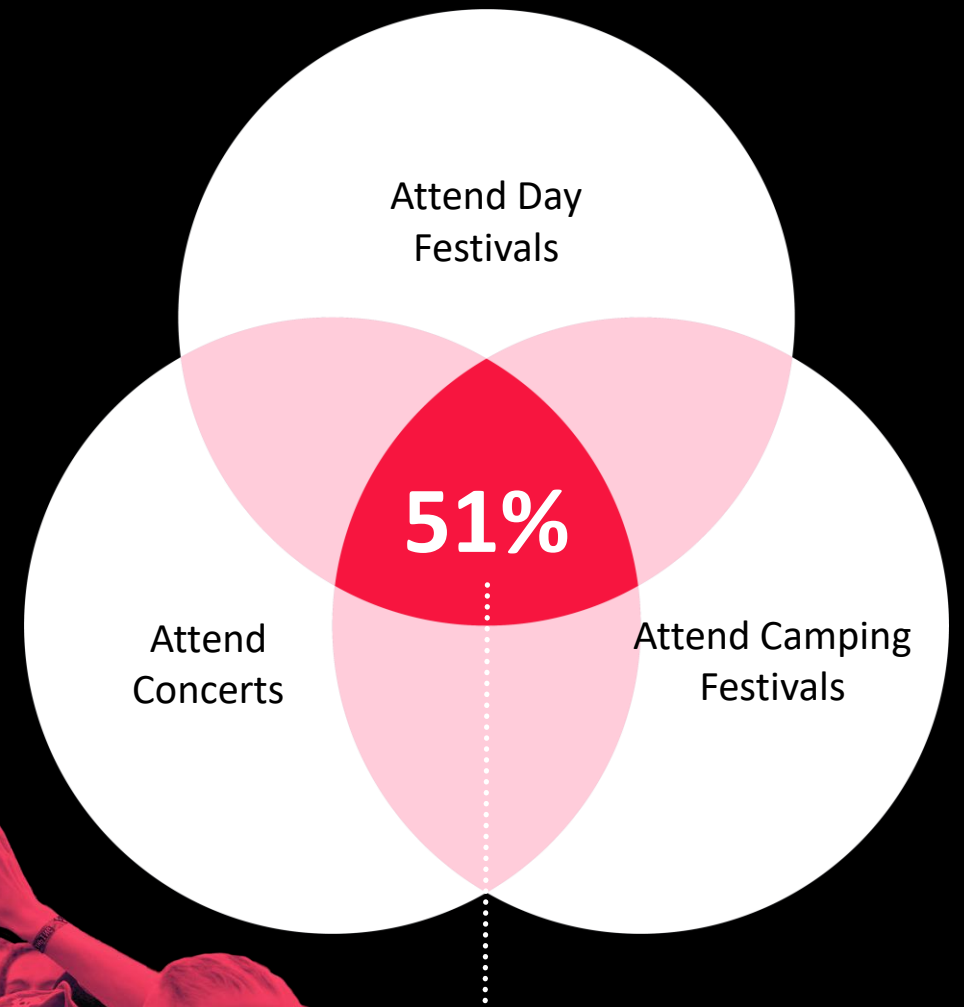
see brand partnerships at live music events as a **good way to** be introduced to **new products**



When brands invest in enhancing the fan journey, they align themselves with **collective aspiration**, culminating in the rare euphoria only live music can afford.

Fans are on multiple live music journeys at once, across both festivals and concerts simultaneously.

We looked at different live music event types – **camping festivals**, **day festivals** and **concerts**. Our research shows fans attend multiple event types and they are **often on overlapping phases** of the live music journeys happening at once. They're always on and brands should be too.



of live music fans go to all three event types



THE LIVE MUSIC FAN JOURNEY

From the moment a live music event makes it to a fan's gig radar up until their intention to attend.

Discover Passively

Hear about a gig through media, targeted advertising or word of mouth from friends.

Discover Actively

60% of fans dedicate a great deal of time researching the live music event they plan to attend.

The post-event come down and reliving the highlights of the event.

Short term and life-long memory makers.

92% agree

that live music has the ability to create new and lasting memories that they can come back to.

...And Repeat!

In the short term, fans do all of the above... But realise there's nothing like riding the high by doing it all over again.

Begins the moment a fan secures a ticket. The better a fan plans, the more they'll get out of the experience.

Fans are planning

- Coordination with friends
- Travel & Accommodation
- Research of & around the event
- Shopping

The moment fans have been waiting for! From the time fans leave their home to when the show concludes.

"It's just so exciting. You're there and think this is the pinnacle of summer... You always end up talking to people and meeting people. It's fun and exciting. You're talking about music. You're hearing the music you like."

JADA



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