



Understanding Festival Fans

A Look at What Drives Music Festival Spend and Attendance



“

There's so much more to a great festival than just music. It's the atmosphere and the coming together of like minded people, all in a field for one big party that you never want to end.” - Matthew, 32

Matthew is what you might call a festival super fan. He's been going to multiple music festivals every year for the past several years and doesn't see himself slowing down anytime soon.

Matthew's not alone in his enthusiasm — according to the UK Music's 'Wish You Were Here 2016' report, 3.7 million people attended UK music festivals in 2015. But even with such a massive attendance number, there's a degree of uncertainty as to what the future holds for the UK's saturated festival market.

Producing music festivals is risky and demanding. The business requires huge capital outlays. Festivals need clear differentiation from their many competitors. Success or failure can hinge on factors outside of organisers' control, such as the unpredictable British weather. With festival cancellations and promoters going out of business or selling to corporations, it's natural to question what can festivals do to ensure they survive and thrive.

Over the past ten years, Eventbrite has processed tens of millions of tickets to music festivals and concerts. In an effort to provide new insight into the state of the music festival industry and the fans who drive it, we worked with independent research company MusicWatch to survey over 500 18-49 year olds in the UK that attended at least one music festival in the past 12 months.

We uncovered scores of insights around how much people are spending and why they're attending, which we will dig into within this report. We also learned that despite concerns about saturation, attendance is holding strong: 73% of respondents went to the same number or more music festivals in the last 12 months compared to the previous year, and almost half (48%) plan to attend even more festivals in the coming 12 months.

But the most important thing we learned? One type of festival attendee is disproportionately spending and attending more.

“

One out of every four festival attendees spends more on music festival tickets in a year than the other three attendees combined.

So the question is... Who is this stand out attendee?

The Festival Super Fan and the 80/20 Rule

As a festival organiser, you already know that some fans drive more revenue than others. Most people have heard of the 80/20 rule, where 20% of your customers might drive up to 80% of your business. For UK festivals we found it's more like the 72/28 rule, with 28% of festival goers being festival super fans, attending an average of four festivals a year. But how can you identify and target this audience, so you can focus your efforts and achieve the greatest success?

To pinpoint the festival super fan, we looked at several factors that impact how valuable a festival fan might be: their average ticket spend, how many festivals they attend, how influential they are in getting friends to go, how often they go back to the same festivals, and many more. When we looked across all the variables, we found that festival goers clustered into three distinct groups:

1. **Festival Super Fans** (28% of all festival goers; attend an average of four (3.9) festivals each year)
2. **Moderate Festival Goers** (34% of all festival goers; attend two festivals each year),
3. **Casual Festival Goers** (38% of all festival goers; attend one festival each year).



Festival super fans spend 43% more on an average festival ticket than casual festival goers.

Festival super fans are not only attending more events overall, they're also more valuable to your specific business: they're spending £45 more on a festival ticket compared to casual festival goers. This increase in spend could be on upgrades in camping and glamping, or access to VIP areas. They also demonstrate loyalty, attending their favourite festivals an average of two to three (2.6) times.

In fact, festival super fans outrank casual fans in attending, social influence, and virtually every other aspect of spending and engagement.

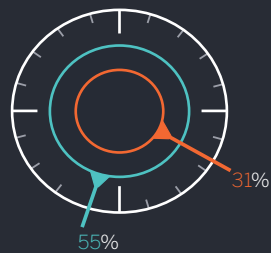
Festival Super Fans vs. Casual Festival Goers



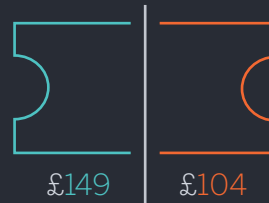
Super Fan
Attends 4 festivals a year



Casual Festival Goer
Attends 1 festival a year



Say their friends count on them to keep them informed about upcoming festivals

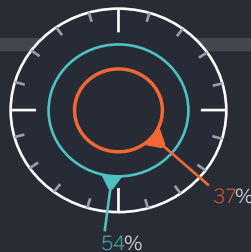


Average spend for a festival ticket



77%
66%

Post on social media while at a festival



Would go alone to a festival they really wanted to attend



Have purchased a VIP ticket in the past

While festival producers want to reach every potential attendee, even the most casual festival goer, doubling down on the 28% of festival super fans can power your business' growth.

Now that you've realised the value of your biggest fans, it's time to get to know them.

Meet the Festival Super Fan

The average UK festival super fan is 32 years old and skews male. They don't just have outsized enthusiasm for festivals — they also appear to be bigger spenders on music overall, with 79% having purchased a digital download in the past year, 61% buying a CD or vinyl.

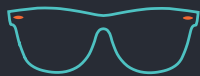
Dissecting the festival Super Fan

The Basics:

Age:

32

Gender:



59% Male



41% Female

Income:

£45K+

Spending & Attending:



Attends 4 music festivals a year

£149

Spend on an average music festival ticket

£226

Spend on their most expensive music festival ticket

61%

have been to their favourite festival 3+ times

37%

travel over 2 hours but still within the UK, a further 24% travel abroad to attend

55%

say they keep their friends informed about upcoming music festivals

3

Number of times they've been to their favourite festival

What Else You Should Know:

#1

Reason they
attend festivals:
the headliners



Favourite Genres:



Alt. /Modern Rock



Classic Rock



Dance



44%

use Instagram while at a festival

58%

engage with sponsors for free drinks or food while at a festival



Festival super fans know what they like. Nearly half (47%) say they would rather attend smaller, niche festivals catering to their specific interests than mainstream festivals. They are also more sensitive to corporate interests affecting the festival experience.

Festival super fans are 50% more likely than casual festival goers to think festivals today are too corporate.



Something keeps festival super fans coming back for more — perhaps the feeling of community that 68% of this group says they get from attending music festivals. That community might also be why festival super fans have serious brand loyalty for certain festivals, often attending their favourite events multiple times.

Festival super fans go to their favourite music festival an average of two to three times.

The festivals that have captured the hearts and wallets of the most festival super fans?

The Top Five UK Music Festivals Super Fans Attend

1. Glastonbury

2. V Festival

3. T in the Park

4. Reading
and Leeds

5. Download
Festival

But before you can win their loyalty, you have to win them over for year one. Now let's dive into how a festival super fan decides on which festivals to go to.

Getting the Festival Super Fan to Your Festival

To reach super fans, it's important for festival producers to consider a diverse marketing mix that encompasses digital and traditional media, as well as key distribution channels like tapping into artists to get the word out.

Compared to casual festival goers, this group is much more likely to learn about festivals through radio and TV, artist communications, and online or print publications.

How Festival Super Fans Learn About Music Festivals

40%

Radio, TV

38%

From an artist's website, email, or social media

38%

A friend/family member's post on social media

36%

From a ticketing provider's website, email, or social media

36%

From the festival promoter's website, email, or social media

35%

A friend/family member told you about it (not on social media)

31%

From an online advertisement

24%

Event listing sites or apps

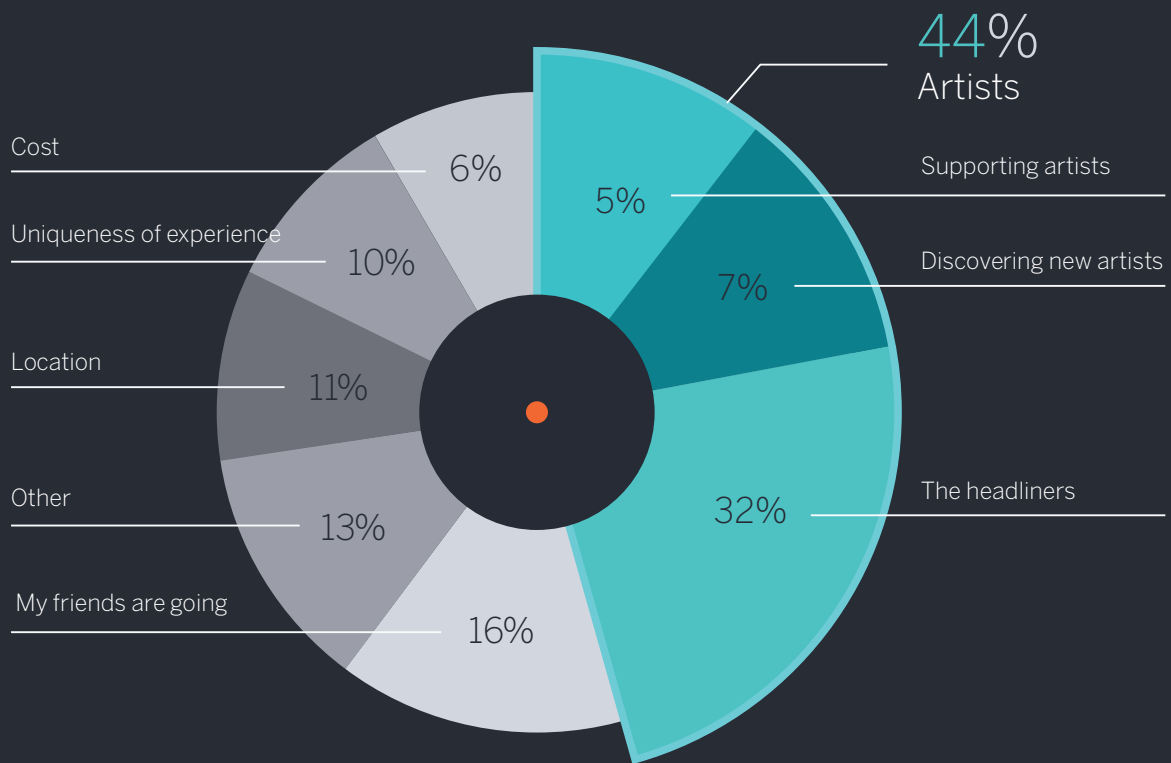
24%

Streaming or video service or app

16%

Street posters or other signage

The Reason Festival Super Fans Decide to Go to a Music Festival



This group is also willing to splash out on an upgraded experience. 18% say they typically purchase VIP festival tickets (vs. 6% of casual festival goers). Motivations for purchasing upgraded tickets were VIP-only access to artist lounges, viewing areas close to the stage, VIP toilets, and free drinks. Around half (48%) of festival super fans who have purchased VIP in the past are willing to pay at least double the cost of a general admission ticket. Two out of five are willing to pay at least double the price of GA for access to faster, private entry.



When asked about the most they spent on a festival ticket, festival super fans spent £226 per ticket — that's £29 higher than the average UK festival goer.

So now that we've covered what aspects of the festival experience appeal most to the festival super fans, let's break down their technology preferences and behaviours.



Festival Super Fans Tech Preferences

As a festival producer, some of the most financially important decisions you make about your event are around technology. So how important are investments in RFID wristbands, cashless payments and live streaming to these festival super fans?



While all the groups preferred to use wristbands for festival entry, only festival super fans were convinced about using similar technology for payments.

In general, festival super fans are more active on social while at a festival, being 23% more likely to use Snapchat, 63% more likely to tweet about it and 70% more likely to use Instagram as casual festival goers. Across all groups, Facebook is the most popular social app used at a festival overall, followed by Instagram and Twitter.

When they can't attend a music festival, festival super fans are more likely to participate virtually - 68% say they have actually watched a festival's live stream in the past (vs. 36% of casual festival goers). This statistic suggests that investing in live streaming technology can pay off in the form of festival super fans' engagement and loyalty.

Festival Super Fans are Disproportionately Driving Growth in the Festival Industry

So what does all this mean? To put it simply: festival super fans are driving the majority of the growth in the music festival industry.

43% of festival super fans attended more festivals in the past 12 months in comparison to the previous year. And while festival super fans only make up 28% of festival attendees, they account for over half of the total annual spend on festival tickets. For festival super fans like Matthew, it's not just about chasing the next thrill – music festivals are a way of life.



Eventbrite

Eventbrite enables people all over the world to plan, promote, and sell out any event. Since its inception in 2006, Eventbrite has processed over 200 million tickets in 187 countries.

The online ticketing platform makes it easy for anyone to discover events, and to share the events they are attending with the people they know. Eventbrite provides a professional, simple way to manage and promote events to help you reach your business goals.

Learn more at www.eventbrite.co.uk/music or call 0800 652 4993.

About this study

These findings are from a survey conducted by MusicWatch, Inc. from June 17-28, 2016 on behalf of Eventbrite. A sample of 504 adults age 18-49 from the Quest Mindshare UK panel were surveyed online in English.