LIVE Insights
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 May 2024.

This is the fifth wave of research previously undertaken in November 2023, April 2023, November 2022 and May 2022.

The five data points captured over a two year period allows us to view audience trends as we moved out of lockdown and into a new normal.

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The Fifth Wave

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May 2024: a more settled picture with lingering challenges

- **Fundamentally, people love live music**, just 11% say they do not think about going to gigs.
- Highest recorded figure (31%) for those not changed approach to ticket buying suggests **a more settled picture**.
- **Post-lockdown habits now established across the population.** c. 10% of 18-24s finding reasons not to go out and a concerning 19% saying they do not have enough energy.
- **Cost of living still a factor** as highest figures recorded for 'everything feels expensive (27%) and having less disposable income (20%).
- **Ticket usage highest to date** (65%). Oldest customers most likely to use (73%).
- **Lockdown legacy** leaves 25% not wanting to be in crowds. Beyond that, good to see **low levels of concern**, though younger groups are most concerned about violence against women and minorities.
- **Spending snapshot** suggests a night out at a gig comes to £166 (London £220).
- Uncapped **secondary ticketing** is not popular with just 15% supporting the idea that sellers should be free to set their own price.
- Using **ticketing mechanics/elements** to fund wider industry projects is popular.

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Ticket Purchasing & Attendance

Approach to ticket buying in the last year

- 31% now say their approach to buying tickets has not changed in the last year up from 24% two years ago.

- Where there is change, age remains a significant factor
  - 10% are buying later to be sure they can afford to attend
    - Rises to 18% for 18-24s, just 3% of 55+, 25% Country
  - 8% are buying earlier to guarantee attendance
    - Rises to 16% for 18-24s, just 4% of 55+, 18% Metal/House
  - 6% are buying later as confident tickets will be available
    - Rises to 17% for 25-34s, 19% Electronic

These figures have remained consistent across the last four waves of research, suggesting a new normal.

Attitude towards attending

	All	18-24	55+	Genre	Region
Not as much energy	16%	19%	14%	23% Classical/Metal	London 21%
Attending fewer events	15%	10%	13%	25% Country	London 24%
Travelling feels like a lot of effort	13%	10%	14%	20% Classical/Blues	S East 20%
Don’t think about going to live music	11%	8%	12%	18% Classical	
Now do not go out midweek	7%	11%	4%	16% Metal	
Now do not go out weekends	7%	9%	3%	17% Metal	
Going out more	6%	16%	2%	19% Classical	

The youngest age group is also the most volatile, less energy and less likely to go out weekends and midweek but also most likely to be thinking about live music, attending events and going out more.

While the figure attending fewer events has fallen over the last two years from 20% to 15%, the other factors remain consistent over the five waves of research suggesting we are at a new normal.

How are people currently feeling about buying tickets?

- 31% feel tickets are too expensive
  - 21% 18-24s, 35% 35-54s, 44% Rock

- 27% everything feels expensive these days (highest recorded across all waves of research)
  - 21% 18-24s, 55+ (a rare example of alignment), 34% 45-54s, 31% South East, 42% Rock

- 20% have less disposable income to spend on tickets (up 4% since the last wave of research)
  - 14% 55+, 28% 35-44s, 27% London, 37% Blues/Jazz

- 8% buying some tickets, but going to fewer events overall
  - 12% 18-24s, 5% 55+, 14% London, 20% Country

The economic headwinds that have hit the live music industry in recent years continue to impact a material percentage of respondents. Audience's love of live music means these figures are lower than they could otherwise be. An improving economy should have a rapid and positive impact on attendance.

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Ever bought a ticket and not attended

Again, significant differences between age groups

- 65% say that if they have a ticket they always use it (highest figure recorded across all waves)
  - 53% 18-24s,73% 55+, 68% Rock/Pop, 51% Metal, 75% N Ireland, 57% North West
- 6% bought and sold on
  - 12% 25-34, 1% 55+, 15% London, 17% Metal
- 4% bought and forgot to use
  - 11% 18-24, 1% 55+, 12% North East, 14% House
- 6% bought but could not be bothered to attend
  - 10% 18-24, 3% 55+, 17% Metal
- 5% bought but did not attend because of the expense of the whole night out
  - 10% 18-24s, 1% 55+, London 10%, 16% Classical/Country/Metal/House

Overall, it is clear that a small but persistent element of the important youth market remains least likely to use their ticket.

Safety

Concerns about live events

	All	Male	Female	18-24	55+	Genre	Region
Do not want to be in crowds	25%	20%	29%	19%	27%	28% Folk	31% E Eng
Worried about terrorism	13%	10%	16%	16%	9%	25% Hip/Hop	18% London
Do not feel safe	8%	7%	9%	8%	6%	12% Classical	13% NE
Worried about violence against women	8%	6%	9%	16%	4%	17% House	13% London
Worried about violence against minorities	7%	6%	7%	13%	4%	15% Hip Hop	14% London
Concerned about environmental impact	5%	5%	5%	5%	3%	13% Classical	10% London

Good to see that the vast majority of customers feel safe at live music events. Again, the youngest age group over indexes on concerns. Combined with their wider issues, suggests a need to be addressed.

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Spend

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Audience Spend Across the Whole Night

- Given ongoing financial pressures and the shifting dynamic between large and small events, LIVE used this wave of questions to understand more about spend on a night out
- Average spend on a single ticket for a live music event is £65.10
  - 25-34 £80.40, 55+ £53.80, N. Ireland £58.10, London £82.90, Metal £76.40
- Average spend at a live music event (e.g. on merchandise, food, drinks, etc.) is £45.40
  - Male £51.60, Female £39.90, 25-34 £64.80, 55+ £27.80, Wales £26.90, London £66.30, Electronic/House £68.40
- Average spend either side of the event (travel, food, drink accommodation) is £55.50
  - Male £62.20, Female £49.90, 25-34 £67, 45-54 £44.30, South East £45.70, London £70.60, Electronic/House £68.00
- Average spend across the whole night is £166
  - London £219.80

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Supporting Wider Initiatives

Audience Behaviour: Ticketing, levies and resale

Given LIVE's ongoing development of the LIVE Trust and work with partners across live music on ways to support grassroots venues, festivals, artists and promoters, we took the opportunity in this wave of research to ask about ticketing, levies and resale.

- Only 15% support the idea that sellers should be free to set their own price in the secondary market
- 41% support (14% oppose) using part of VAT on tickets to reduce carbon emissions related to live music events and associated audience travel
    - Rises to 57% amongst Folk fans and 54% amongst 18-24s
- 47% support (10% oppose) using part of VAT on tickets to reinvest in the live music industry
    - Rises to 61% amongst fans of Rock, House and Blues/Jazz/Soul
- 48% support (9% oppose) lower VAT on tickets to ease the pressure on grassroots music venues and independent festivals
    - Rises to 63% amongst Rock fans

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Audience Behaviour: Ticketing, levies and resale

- 33% support adding an additional fee (e.g. £1) to tickets to offset the carbon footprint of the event
  - Rises to 47% of 18-24s, 50% Folk fans
  - 22% oppose, rises to 29% amongst Classical fans
- 40% support adding an additional fee (e.g. £1) to tickets to support the music industry (e.g. emerging artists, small venues, etc.)
  - Rises to 51% of 18-24s, 59% of House fans
  - 17% oppose, rises to 27% of Classical fans
- 39% support (18% oppose) using a portion of the ticket price (e.g. £1) to offset event's carbon footprint
  - Rises to 53% of 18-24s
- 44% support (13% oppose) donating a portion of the ticket price (e.g. £1) to support the music industry (e.g. emerging artists, small venues, etc.)
  - Rises to 52% of 18-24s

All funding mechanics are popular with the idea of diverting VAT to support grassroots having the most backing.

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Conclusions

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- Fundamentally, people love live music, that provides a tremendous platform for growth as economic conditions improve.

- A combination of lingering lockdown legacies and economic challenges could be addressed by targeted Government support to boost participation and access for our youngest customers.

- Gigs, concerts and festivals are seen as fundamentally safe though we can all do more to ensure all feel welcome.

- Labour's plans to address ticket touts are clearly popular with just 15% supporting the idea that sellers should be free to set their own price.

- Taking forward the CMS Committee recommendations in its recent report on Grassroots Music Venues would prove popular with support for industry action and movement on VAT.

Thank you.

For questions and data requests please email:

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