



MUSIC FESTIVAL

STUDY

Eventbrite

mashwork

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TOP FINDINGS & INSIGHTS

Music festivals are becoming one of young Americans' favorite pastimes. Music festival conversation saw a 34% increase this year as compared to last festival season, which equates to over 20 million conversations. The high prevalence of Millennials driving this conversation signals that conversation will only continue to grow in future years. All told, roughly 75% of music festival conversation was generated by individuals between the ages of 17 to 34.

People discussing festivals are talking significantly more about the experiential nature of these events and less about the specific artists and performances. A full 17% of all positive conversation specifically commented on the festival experience. When people do discuss the artists performing, they are four times more likely to discuss the lineup holistically as compared to calling out a specific artist or performance. These trends suggest that individuals consider festivals to be more about the overall experience and not just about going to a concert.

8 out of the top 25 music festivals were exclusively electronic. Not only are electronic music festivals driving high turnout, they are also generating massive amounts of social conversation. Even though multi-genre events, such as Coachella and South by Southwest, topped out the list of the most discussed festivals in terms of raw volume, no other single-genre category of events had as prominent a showing as electronic music. One reason for this is the high prevalence of Millennials discussing music festivals (roughly 75% of people discussing music festivals are between the ages of 17 and 34), and this age group has an established affinity for events in this genre.

Remote participation is driving conversation about music festivals. Roughly 1 out of every 4 posts about music festivals came from people participating remotely via live streams or other forms of engagement. This is important because live streaming increases interest in the events themselves, as 70% of people said they are more likely to attend a future live event after participating in the experience online.**

Most event conversation happens before the event actually occurs. Nearly half of conversation about music festivals happens before the event. Many of the positive drivers of music festival conversation are anticipatory in nature, such as announcements of a ticket purchase (3%) or excitement about the lineup of an event (39%). An illustrative example is Coachella, which drove two of the largest spikes in festival season conversation: the first from their lineup announcement and the second during the commencement of the event.



AMERICA'S MOST BUZZED ABOUT

MUSIC FESTIVALS

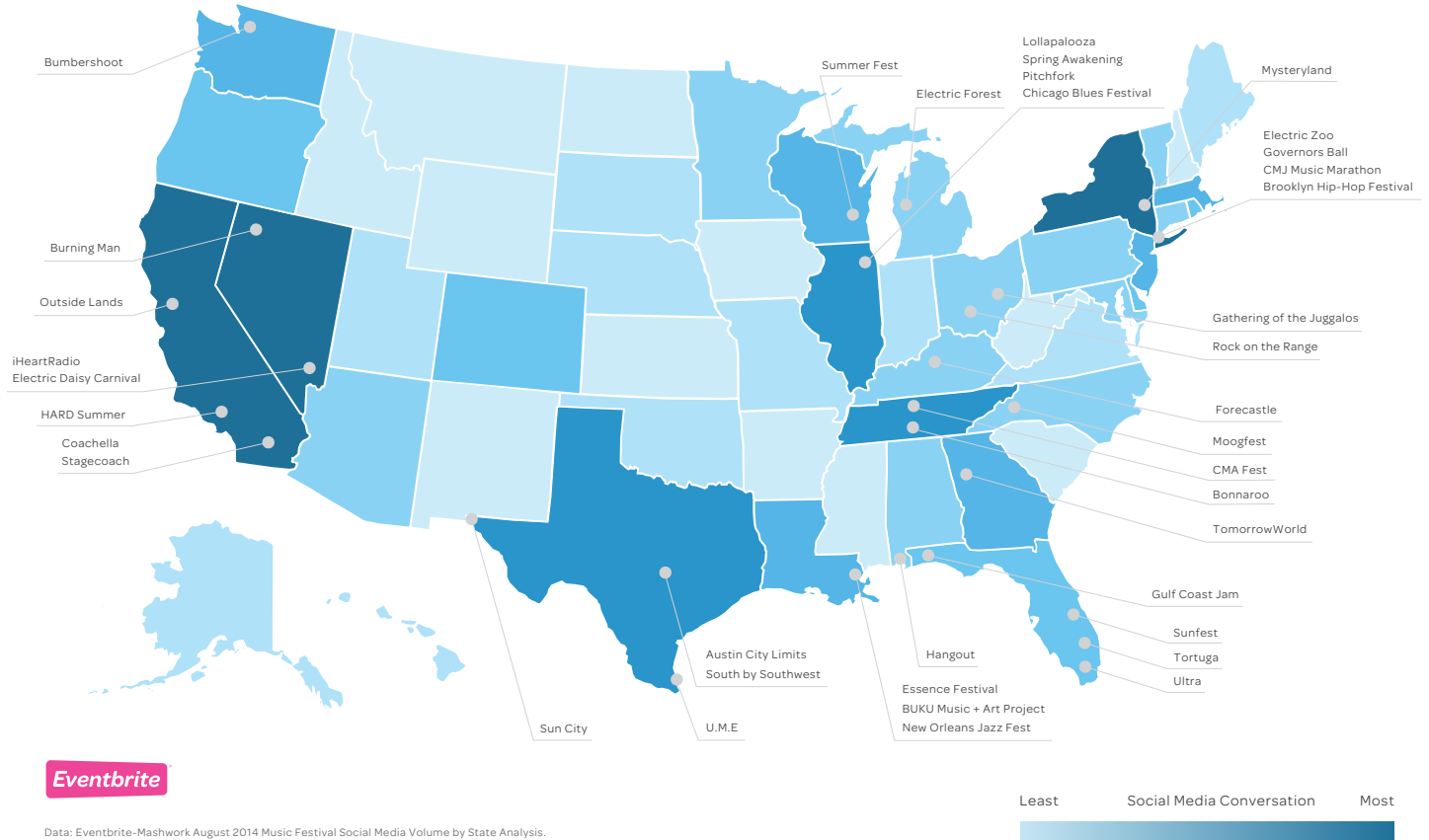
Below is a list of the most discussed music festivals of the 2013 – 2014 festival season.

Most discussed is determined by total event buzz relative to total attendance.

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1. **SOUTH BY SOUTHWEST (MUSIC)**
 2. **IHEARTRADIO**
 3. **TOMORROWWORLD**
 4. **LOLLAPALOOZA**
 5. **COACHELLA**
 6. **SUN CITY**
 7. **MYSTERYLAND**
 8. **PITCHFORK**
 9. **ELECTRIC DAISY CARNIVAL**
 10. **BONNAROO**
 11. **ELECTRIC ZOO**
 12. **WARPED TOUR**
 13. **GATHERING OF THE JUGGALOS**
 14. **BUKU MUSIC + ART PROJECT**
 15. **HARD SUMMER**
 16. **BURNING MAN**
 17. **HANGOUT**
 18. **FORECASTLE**
 19. **GOVERNORS BALL**
 20. **ULTRA**
 21. **SPRING AWAKENING**
 22. **SUNFEST**
 23. **MOOGFEST**
 24. **GULF COAST JAM**
 25. **BROOKLYN HIP HOP**

AMERICA IS BUZZING ABOUT MUSIC FESTIVALS

A Look at Music Festival Social Media Chatter by State



ELECTRIC ZOO

New York 7.58%

"I am in madly love with Intense! my God #Ezoo is going to be AWESOME #ArminVanBuuren"

—@x3Redd, Twitter

ELECTRIC DAISY CARNIVAL

Nevada 6.76%

"Life is complete...heaven for me #deorro #edclv #kineticfield #mainstage #melbournebounce... <http://instagram.com/p/pmAQClhZYe/>"

—@valerieblayze, Twitter

COACHELLA

California 6.73%

"Doin' it #intencity (at @Coachella Valley Music and Arts Festival w/ 445 others) <http://4sq.com/1kD8FW8>"

—@TonyUtweets, Twitter

LOLLAPALOOZA

Illinois 5.28%

"OH I WANT TO GO TO LOLLA THIS YEAR ITS GOING TO BE AWESOME!!"

"wait. for. the. lineup. shhhhhhhhh shhh"

—@jamesontwats, Twitter

SXSW

Texas 4.84%

"Oh my @PSB_HQ is amazing! So awesome :) #SXSW"

—@waaltmusic, Twitter

BONNAROO

Tennessee 4.04%

"Bonnaroo is awesome!!"

—@JoMiller87, Twitter



— PART I —

MUSIC FESTIVAL CONVERSATION ANALYSIS

INSIGHTS: PRE/DURING/POST EVENT CONVERSATION BREAKDOWN

Pre-Event discussion represents the most scalable pool of conversation for marketers to target.

Pre-Event conversation dominated discussion, accounting for over half of overall posts. People announced ticket purchases, shared commentary about lineups, and expressed that they wished they could attend a particular event. These statistics are important because they can help to inform social media marketing strategy. Knowing that social media is primarily used to discuss pre-event buzz, event promoters can spend resources on pre-event-specific hashtags to ensure that everyone that is talking about an event is having the same conversation in the same place. Branded hashtags are also helpful from an analytics perspective, as promoters can easily see which performers drive excitement or concern.

Though many people engage with festivals outside of the event, a significant portion of the positive buzz comes while it is happening. 17% of discussion occurred during festivals, even though mid-festival conversation can obviously happen on far fewer days than pre and post-event conversation can. For event promoters, this high percentage of During Event conversation emphasizes the importance of organizing this conversation to create buzz. 38% of posts within the During Event category used a hashtag. This was not only the highest percentage of any of the three phases, but it was also 16% higher than the overall Twitter average of hashtag usage. Since more people are using hashtags during events than they are at other times, they will be more willing to use an event's branded hashtag. Informing both attendees and those participating remotely of the event's branded hashtag(s) can have a huge upside in terms of both building positive buzz and assessing which elements of a festival are popular and unpopular.

INSIGHTS: CONTINUED

A music festival's brand and reputation are the primary drivers of positive social media conversation.

The majority of posts fell into categories that emphasized the festival experience as opposed to specific performances that were taking place. 39% of posts mentioned the lineup without mentioning an artist and 17% of conversation expressed excitement about the event without mentioning a performer or lineup. However, only 8% of positive posts specifically mentioned an artist or performance. The takeaway is that talent plays an important role in building a festival's brand, but a festival is far more than the sum of its lineup. What matters most to attendees is the overall festival experience itself. In building their brand, promoters should know what truly differentiates their festival and sets their brand apart - like yoga at Wanderlust or the beautiful beach setting of Hangout Music Festival.

Festivals have the potential to garner huge engagement outside of the festival itself. 23% of conversation (approximately 5 million posts) came from people who were participating in the festival remotely. These posts included live streams as well as music videos and videos from concerts or festivals. 21% of posts expressed fear of missing out (FOMO) or came from fans that wished they could have attended a particular festival. As a result, the "remote" audience included both non-attendees and attendees after they left the event. It is advantageous for promoters to incorporate the "remote" audience into their social media and overall marketing strategy. Knowing that live streams and videos of performances after an event are so popular, promoters can look to provide new types of content, such as exclusive interviews or behind the scenes videos.

PRE/DURING/POST EVENT CONVERSATION BREAKDOWN

The following graphic is a visual representation of the conversation breakdown relative to when a music festival takes place.



PRE/DURING/POST EVENT CONVERSATION BREAKDOWN



PRE-EVENT: 54%

This category consisted of any post that spoke about festivals before they happened. Conversation ranged from commentary about a particular festival's lineup, to statements about intending to go to an event, to media posts about an event. A large percentage of posts expressed excitement about attending an event of choice.

VERBATIMS

"The lineup for the Firefly Music Festival has been released - I was going to buy tickets and now I definitely will <http://bit.ly/1d4aC3v>"

—@VictoriaWolk, Twitter

"Can't wait to see what Vanessa Hudgens and Austin Butler are going to wear next for Coachella 2014 (and other celebs)"

—@mariaxfrancesca, Twitter

"I think I will go to burning man next year. How much are the tix?"

—@NitrogenComplex, Twitter

"Tonight will be fun, I'm going to the Rush City music festival for karaoke and a band. Come on out admission is... <http://fb.me/2OaKft5eZ>"

—@PaulGammel, Twitter

"So, turns out I'm going to Bonnaroo next week. Any other nerds gonna be there? Ready for camping, dancing and good music."

—@TimeLord_mk, Twitter

PRE/DURING/POST EVENT CONVERSATION BREAKDOWN



DURING EVENT: 17%

This category consisted of posts from people while at a music event or while watching it on TV. Many posts in this category shared quotes, videos, and photos from the event, while others simply stated that they were watching the event or that they were enjoying a performance. A few posts described funny stories that had just happened while they were at an event.

VERBATIMS

"Watching CMA Music Festival :))))"

—@ClausenCourtney, Twitter

"Im diggin' ultra music fest right now"

—@_carmeloo, Twitter

"J cole right now on iheart radio music festival, killing it"

—@Stamey18, Twitter

"#Greenlight music festival now happening!"

—@stealth_hiroshi, Twitter

"I could not be any happier right now, seriously. #HangoutFest"

—@rhpmiller, Twitter

PRE/DURING/POST EVENT CONVERSATION BREAKDOWN



POST-EVENT: 29%

Posts in this category generally reflected on experiences that people had during an event in the past. Media coverage, photos that were posted after an event, and fond memories of a past event all fell into this category. Some posts were also critical of a live performance they had seen.

VERBATIMS

"The 17 Best Things we saw at @Lollapalooza <http://win.gs/1stwCRa>"

–@redbull, Twitter

"@jenalive11 @TonightAlive had a crazy time in the mosh pit at @VansWarpedTour #tonightalive #adelaide #warpedtour"

–@NicoleTohl, Twitter

"Hey remember that time we saw @3eb at sxsw? #tbt #sxsw2013 #relivingthe90s #classic #shutdown4thst? <http://instagram.com/p/kpLJhdK7OS/>"

–@ktb182, Twitter

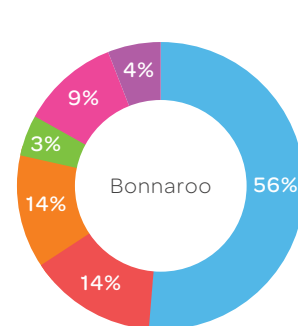
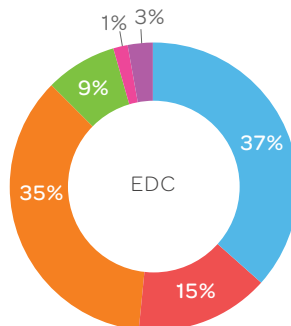
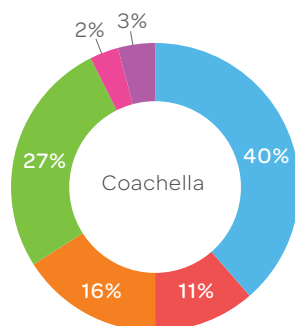
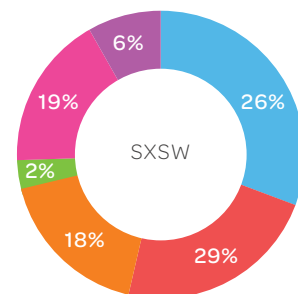
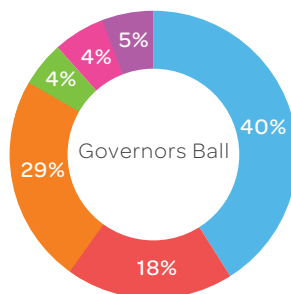
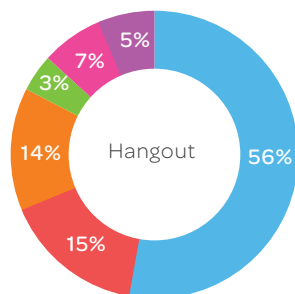
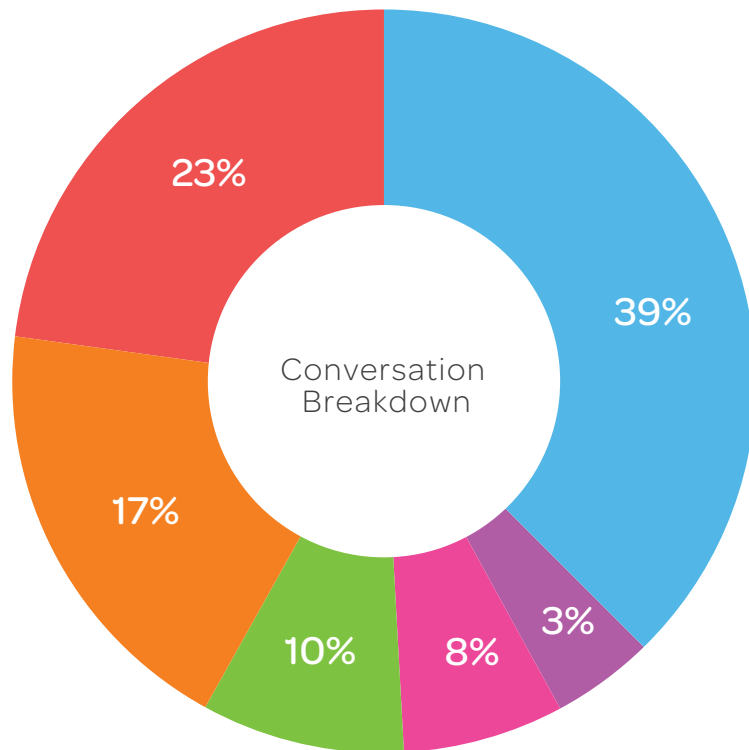
"Had a great time with @letsbefriendsUK at @Mysteryland_USA #mysteryland #LetsBeFriends #edm #festival #edmvibes ..."

–@Tony_Colasurdo, Twitter

WHAT FANS ARE SAYING ABOUT MUSIC FESTIVALS

Eventbrite research shows how fan conversation differs by music festival

- Excited about the lineup
- Excited to see a specific artist
- Got my ticket
- Excited for the experience
- Fashion
- Participating remotely/ watching a live stream



A person wearing a hat and boots stands on a stage, facing a large crowd of people. The scene is dimly lit, with the audience visible in the background. A microphone stand and a small electronic device are on the stage floor.

PART II

AUDIENCE DEMOGRAPHICS

DEMOGRAPHIC INSIGHTS

Social media marketing is the best way to reach music festival audiences and understand their preferences.

Within our sample, people who tweeted about music festivals over-indexed in the “>5 tweets/day” category by 34% and “>1,000 followers” by 16% relative to the average Twitter user. In fact, the age breakdown of people tweeting about music festivals was almost identical to the overall Twitter demographic breakdown, with only two age groups deviating from the Twitter average by more than 1% (Age group 20-24 by 2.1% and Age group 30-34 by 1.7%). Regardless of festival type or even age, music festival audiences align closely with heavy Twitter users. From the event promoter’s perspective, this information is useful because it underscores the importance of social media strategy in overall marketing effectiveness. Since the average festival attendee and fan is so apt to post on social media, the data and insights gleaned from social media listening are even more robust and actionable.

DEMOGRAPHICS

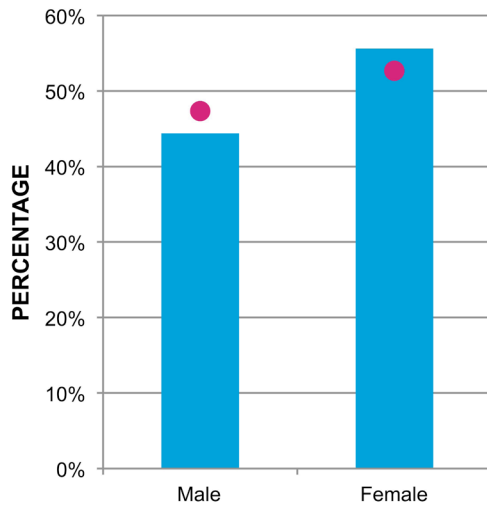
Below is a breakdown of the basic demographics of those discussing music festivals.

KEY

- MUSIC FESTIVALS
- TWITTER AVERAGE

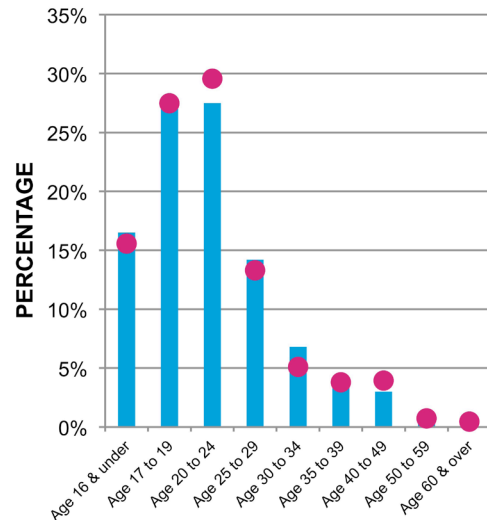
GENDER

The majority of music festival discussion came from women.



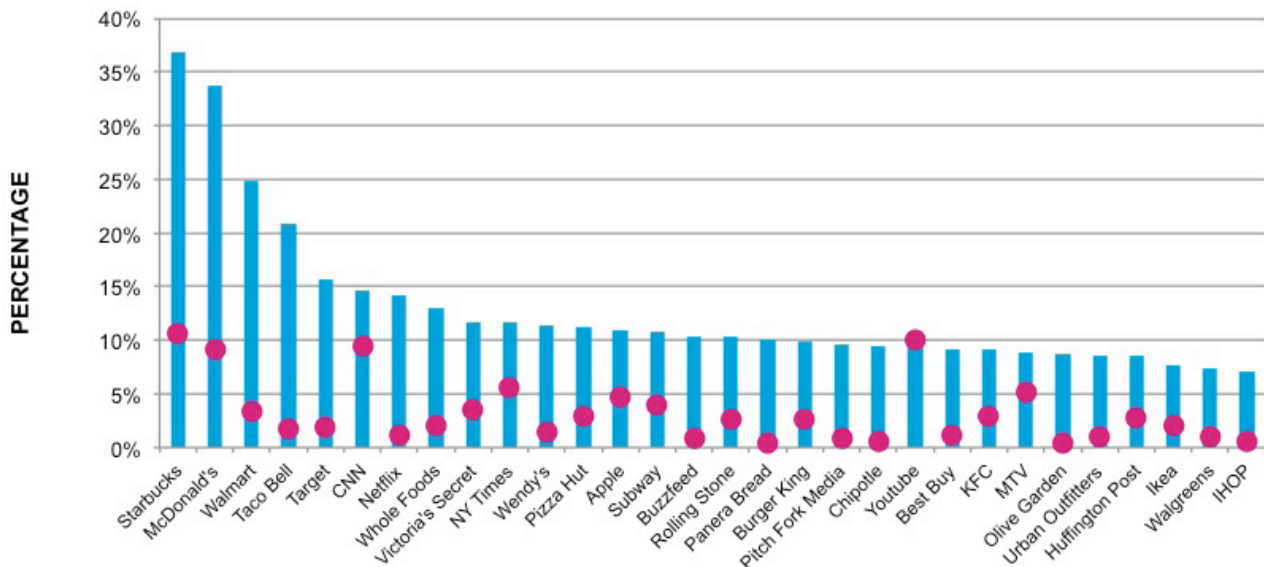
AGE BREAKDOWN

The age breakdown of music festival fans closely echoed that of the average Twitter user.



FAVORITE BRANDS

Starbucks, McDonalds, and Walmart were music festival fans' favorite brands.



SOURCE: 9,329 Twitter Accounts

METHODOLOGY

For this analysis, our goal was to holistically understand music festivals through the lens of social media. We approached this analysis with a multifaceted approach, one that relied on social listening, influencer analysis, and an in-depth demographic and psychographic analysis of the people discussing music festivals.

PART 1: MUSIC FESTIVAL CONVERSATION ANALYSIS; PRE/DURING/POST EVENT CONVERSATION ANALYSIS

We started by analyzing the total social media conversation surrounding music festival season at large. We accomplished this by constructing a complex Boolean framework that captured 181 major music festivals, their branded and popular unbranded hashtags, as well as their Twitter handles when applicable. In addition to this, we developed a complex Boolean framework designed to capture the entirety of unbranded music festival conversation. We combined these two frameworks into a comprehensive Boolean aggregate, designed to holistically capture all conversation surrounding music festivals at large. We used this aggregate framework to study conversation from 8/6/13 through 8/5/14, capturing a full year's worth of social media conversation surrounding music festivals across Twitter, public Facebook, blogs, and forums.

Once the conversational results were returned from our aggregate Boolean framework, we analyzed the spikes in conversation over time, identified the largest ones, and called out the festivals that drove these swells in conversation. We then performed this same process again, to study where the conversation was geographically coming from.

We took these results and sorted conversation that occurred before, during, and after a festival into three separate thematic "buckets." Our goal was to understand where in time conversation took place (at scale) in relation to the events. Once we had organized a sample of conversation, we used our technology to replicate our organizational judgement across the entirety of music festival conversation. We then analyzed the returned results for accuracy, as well as actionable trends and insights.

We then replicated the process previously mentioned to discover what makes a music festival "loveworthy." Again, we organized conversation into different thematic "buckets," only this time we grouped them by different drivers of positive sentiment. Our technology replicated our organization across music festival conversation at large, and returned to us the breakdown of the most scalable drivers of music festival conversation.

PART 2: AUDIENCE DEMOGRAPHICS

To determine the demographics of the individuals discussing music festivals, we gathered a sample of over 9,000 Twitter users who had discussed at least one music festival within our aggregate Boolean framework. We then analyzed their profiles' social signals, inclusive of all their recent posts, their engagement with brands, as well as their profile metadata. We leveraged this information to derive their demographic information, such as location, age and gender. Lastly, we analyzed their Twitter behaviors, gathering information about the number of followers they had, the number of times they tweeted each day, as well as the accounts they followed the most collectively.

A dark, atmospheric photograph of a concert stage. In the foreground, the silhouettes of musicians are visible, including a person on the right with their hands raised in a gesture. The background is filled with bright, out-of-focus stage lights in shades of yellow and orange, creating a hazy, dreamlike atmosphere. The overall scene is dimly lit, with the primary light sources being the stage lights.

THANK
YOU