

A woman with long dark hair is seated on a wooden stool, playing an acoustic guitar. She is positioned in the center-left of the frame, facing right. The setting is a dark forest at night, with tall, slender trees visible in the background. The air is filled with numerous colorful bokeh lights in shades of purple, blue, yellow, and orange, creating a magical and dreamlike atmosphere. To the right of the woman, there is a large, dark, rectangular object that appears to be a piece of audio equipment, possibly a speaker or amplifier. The ground is covered with a layer of dry leaves or grass. The overall mood is serene and artistic.

**FORWARD  
& JAMBASE**

# THE SHIFTING LANDSCAPE OF LIVE ENTERTAINMENT



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# APPROACH & METHODOLOGY

Forward Studio and JamBase worked to explore the shifting landscape of live entertainment. From music to installations, the team worked to gather trends and key insights that are shaping the next three to five years of live entertainment.

We conducted traditional desk research, gathered first-party data, spoke to industry experts and looked at the influences on live entertainment, ranging from financial to political and human values shifting post-pandemic.

We made a point of looking at past projections of areas like virtual reality and other immersive “live entertainment” products that were poised for significant growth. We are so often only focused at the current burgeoning technology of human behavioral trend that we often forget to see how previous “hype” products and experiences have performed. Those successes and failures can help us leverage the why and apply it to the next wave of what’s next.

Appendix of resources and references available on request.

# ABOUT

## JAMBASE

Since 1998, JamBase has been the online destination for fans of live music. By providing the most reliable database of concert and festival listings, ticket information, and personalization tools. JamBase connects fans with the music they love and empowers them to Go See Live Music.

JamBase works with both commercial enterprises and startups to provide access to our live music database via API and custom delivery. With a depth of 25 years of concert, festival, artist, venue, and ticketing data points partners unlock the power of fandom and supercharge business insights and growth.

Founded by fans for fans, JamBase serves all lovers of live music, while providing a platform for musicians to be discovered. Today, millions of fans utilize JamBase's features every month and rely on the website and mobile app to find the most accurate listings available for over 300,000 artists across genres, performing in 170,000 venues worldwide.

## FORWARD

Forward is a consumer experience design agency driving business growth through partnerships and product and marketing innovation.

We provide marketing and digital product experience design and brand partnership services for future-obsessed companies! We specialize in entertainment, innovation, and emerging technology.

We have over 80+ collective years of experience transforming client ideas and dreams into groundbreaking realities.

Fueled by a passion for innovation, consumer needs, and a desire to make the future a more positive place for all, we push the boundaries of what's possible using new technologies that drive business growth and captivate audiences.

# INTRO



Source: COSM

# POST-PANDEMIC IS GIVING IRL REALNESS.

The last five years have transformed live entertainment. The pandemic spurred a surge in IRL screen-based and virtual experiences, fueling demand for immersive and digital experiences. The absence of in-person events underscored their power, with millions going back to theatres, concerts and festival, and immersive experiences. Add global economic turbulence, the rise of niche interests, and a few pop stars reshaping entire economies, and we find ourselves in a radically different entertainment landscape moving into 2025.

Drawing on 25+ years of data from live music data leader JamBase & Forward's 60+ years of entertainment experience, we'll explore the key trends shaping fan behavior and the entertainment industry. Is a full digital takeover looming, or will the longing for intimate, IRL experiences make a full comeback? Should brands and entertainment purveyors play the long game or adapt fast?

Separating fads from lasting changes, this analysis aims to provide a little clarity on the near future of live and digital entertainment!



# LIVE ENTERTAINMENT

In this snapshot, we view live entertainment as **a live event happening** in real-time or a pre-recorded event being screened or shown live within a fixed period of time.

This can be on a stage, a stadium, a sound stage being streamed live, captured in VR, streamed on Twitch or any other live platform.

SPORTS



MUSEUMS



THEATRE



MUSIC

## WE ASK

*How are people consuming live entertainment?  
What gets them out of the house?*



Source: NextVR

**\$99.3 Billion**

US Spending on live entertainment in 2023\*

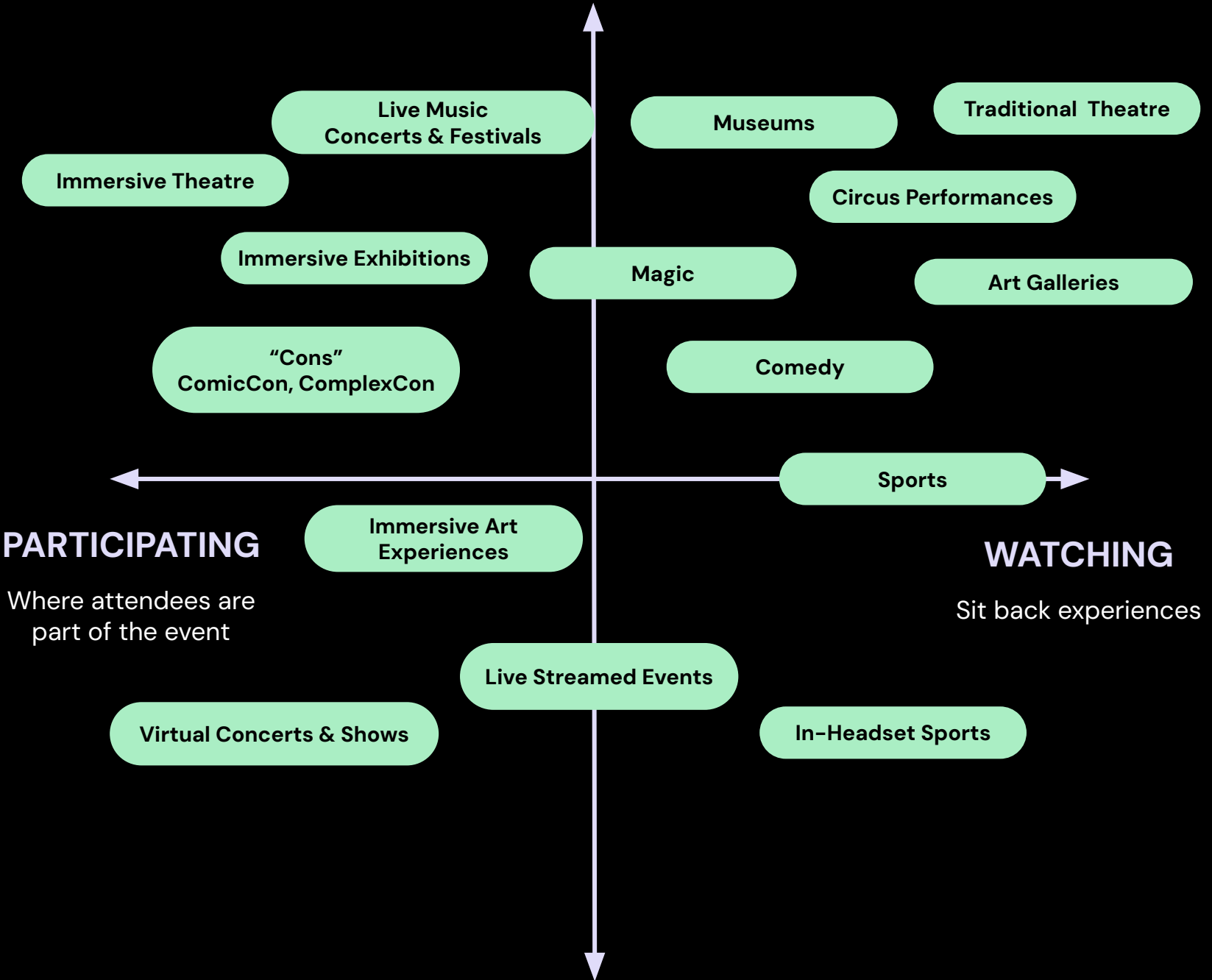
**4.3% CGAR**

for US E&M\*\*

# LIVE ENTERTAINMENT

## IN-PERSON

Events where the attendees are present in person



## HYBRID

Events that are either hosted virtually or live streamed, or relies on the attendee to be part of the entertainment.





Source: MOJO

## TOP TRENDS

### REVENGE OF IRL

The revolution of IRL bringing us back to together

### PERSONALIZATION PERSISTS

From schedules to voting on setlists, reward superfandom by giving back

### HYBRID HUE

The cross-platform hybrid landscape

### CULTURAL EVOLUTION

The niche-defining live events

### AUGMENT TO AMAZE

Novel and scaling tech tools elevating live shows

### A THEATRE REBIRTH

From live streamed music to esports to studios reframing value on cinemas, streaming has not won the war

### DATA DELUGE

From bookings to playlists, how data is shaping the near future more than ever

# THE TRENDS





Source: Sphere

# IRL 2.0

From the Eras Tour to Cosm, IRL is back and redefining the definition of live entertainment.

KEY DATA

78% of fans use live music to cope with stress

66% of Americans prefer live to digital experiences

38% of fans aren’t going to shows because of high cost

SIGNALS

**Anyma at the Sphere**

Originally a three-night stint at Sphere in Las Vegas, the first of its kind audio visual electronic music performance sold out in record time and scaled to a residency. Five shows were added, resulting in over **100,000 tickets sold in less than one day for one artist at one very unique venue.** This show will be a milestone in live music.

Cosm is Just Getting Started

Cosm has **ushered in a new way for fans to experience live sports, immersive art, and experiential entertainment through a curved dome screen experience.** Small stadium style seating, full food menus, and full service bar create an almost VIP like experience. They have two venues in operation, and next up are Atlanta and Detroit as their next venue locations.

DRIVERS

**Reconnecting Nation**

We are inherently communal creatures. Although we date, play, and sleuth online, it is in person connections that we are looking for. This continues to five our activities to IRL.

Rising Costs of Everything

From transportation to licencing costs, promoters are strapped. Between 2019–2024, concert ticket prices went up 34.3%. Creating economies of scale, extending the value of investments and allowing artists to make more money from touring and merchandise are all drivers.





Source: Earmilk

# The Power of Personalization

From Fred Again to unique participatory experiences, personalization builds loyalty and connection.

## KEY DATA

**Attendees will pay more for personalized control in virtual concerts: 80% for the ability to control the "view" from many angles**

**Spotify instantly can match over 350M fans with concert recommendations based on their listening habits**

## SIGNALS

### First Fans to Private Performance

Two days before his sold out concert at the LA coliseum Fred Again... tracked down and invited 150 fans who attended his first LA concert in 2021 to a private listening party. **He greeted each fan personally, handed out mugs of tea, and previewed new songs.** The artist often turns to his online community to vote on what he'll release next and to crowdsource content.

### Bieber Closer to Fans in the Metaverse

In November 2021 The Wave Network presented "Justin Bieber – An Interactive Virtual Experience" offering fans an unprecedented level of personalization and interactivity. **In real-time fans could engage directly with Bieber appearing live on stage with his avatar, influence the performance by sending virtual reactions that altered the virtual environment and visual effects, and appear on the virtual jumbotron.** Each experience was unique while real-time motion capture mirrored Bieber's live movements.

## DRIVERS

### Superfandom Fuels Organic Growth

Diehard & early adopters carry the torch for culture. They foster communities online and mobilize others. Rewarding them with personalized experiences moves the needle.

### In a Sea of Content, a Lake of Curation Wins

Customizable experiences based on personal preferences will stand out in the race for entertainment spending. Unique only-at-this-event experiences create drive demand.





Source: Complex

# The Scene Killed The Genre

Events can deeply resonate with fans when seamlessly integrating all facets of a scene– Fashion, Food, sights, and sounds.

KEY DATA	69% of people say music is important to their identity	ComplexCon generates over 25M in retail sales	91% of Americans can't imagine their lives without their favorite books, music, films, bands sports
SIGNALS	<div>ComplexCon – Lifestyle on Display</div> <div>"The Disneyland of Streetwear" this year's Las Vegas convention attracted <b>60,000 attendees who could shop, participate in panel discussions, see concert, and eat at a family style food festival.</b> Converging an entire lifestyle the event provided new experiences, discovery, and community.</div>	<div>Strengthening Fan–Artist Connection at FORM</div> <div>FORM Festival held in Arizona got back to basics. <b>No VIP sections, No artist backstage tents. Musicians walked amongst fans to share in appreciating the remote desert location.</b> FORM sold out in less than 24 hours by removing typical festival barriers – a rare experience at festivals today. They focused on a communal atmosphere where artists and fans are equal participants. No competing set times, and a venue that created space and comfort.</div>	
DRIVERS	<div>Offline Community Building</div> <div>Spaces that incorporate many facets of a scene foster a sense of belonging through shared interests. Authentic connection stems from shared identities.</div>	<div>Exclusivity Done Right</div> <div>Events that foster unique organic moments through intimacy, exclusivity, or authenticity stand out as not-to-miss.</div>	



Source: Fortnite

# Cross Platform, Big Reach

Phygital simulcasted events allow for larger audiences, deeper interactions with fans, and ways to test and play.

KEY DATA

- The "Just Chatting" category on Twitch is more popular than gaming
- Over 6.94M people globally watched the 2024 League of Legends championships
- Tomorrowland's Tik Tok LIVE reached 16M unique viewers across both weekends

SIGNALS

- Snoop Dogg & Ice Spice Simulcast**

14 million players in-game and millions more watching via YouTube and TikTok took in the concept that was captured in Times Square and streamed live in Fortnite. These platform converging performances continue to bring fans together, allows people to engage with their favourite artists in novel ways, and creates a drive to be part of the big moments.
- Live streaming Redefines the Mainstream**

Kai Cenat’s 727,700 paid subscribers at the end of his November 2024 “Mafiathon 2” demonstrates how live digital events can rival traditional media in terms of cultural impact and audience engagement. The streamer’s record-breaking subscriber numbers and ability to draw massive crowds in real life show how **interactive content, staging elaborate multi-day events across multiple platforms, and improvisational spontaneous moments feel more authentic** than traditional entertainment.

DRIVERS

- Across Platforms and Around the World**

Content that flows between platforms, spill out into the real world, and are recapped across socials create wider reach and viral moments.
- Capturing the Moment for a Limited Time Only**

When a fan knows an event can be seen anytime, anywhere, the drive is lacking. In a sea of mediocre content exclusivity is fast becoming a key driver to how and where experiences are being programmed.





Source: Reddit User ObiYawn

# Augment to Amaze

Technology is defying our expectations of what’s possible and is bringing new life and excitement to in person events.

KEY DATA	<b>The XR concert market is expected to grow from \$105.58 billion in 2023 to \$472.39 billion by 2028</b>	<b>85% of Snapchat users claim to use the app to enhance their live music experiences</b>	<b>AR product experiences are 200% more engaging delivering double the interactivity compared to non-AR</b>
SIGNALS	<b>Coldplay Lights the Sky Green</b>  To help achieve Coldplay's vision to create the most sustainable tour on Earth, and give fans a once in a lifetime live experience, PixMob invented the <b>world's first compostable LED wristband</b> . Launching the most advanced immersive lighting stadium tour to date. 4M fans. 500,000 wristbands.	<b>Bjork Brings the Birds to Coachella</b>  In 2023, Bjork performed alongside an orchestrated and mesmerizing flock of 800 drones at Coachella. <b>Synced up live, alternating in flocks of 200 the drones accompanied the performance</b> , by assembling in mesmerizing formations complementing the music and stage production of Icelandic singer’s set.	
DRIVERS	<b>Fans Desire Unique Moments</b>  Seeing a performance live is special. Being part of the show is memorable. From the Lo-fi days of fans holding signs up, the desire to be part of the show is being met with technology at physical shows.	<b>Tech is Catching up with Artists Imaginations</b>  Show enhancements in LED displays, drones, and synchronized systems are more affordable and accessible than ever. Improved software and wireless communication enable seamless synchronization of large-scale visuals and audience participation elements, such as light-up wristbands.	



Source: Look Cinema

# Cinema Takes Center Stage

From live streamed music to esports to studios reframing value on cinemas, streaming has not won the war.

KEY DATA	Live music & cinema accounted for ⅓ of all 2023 consumer revenue growth	Regal Cinema raised 250M for theatre, ticketing, and app upgrades	2023’s Renaissance: A Film by Beyoncé grossed \$43.9M worldwide in limited release
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SIGNALS

### Movies as Cultural Moments

From “Barbenheimer” to “Glicked” massive marketing budgets leverage ubiquity, virality, and show cinema is here to stay. **With AMC Theatres reporting a record 8.8 million attendees, over 2024 Thanksgiving weekend, marking its busiest period in the company’s 104-year history.** Stories that cross demographic and cultural lines, speak to the moment and indicate that audiences will still flock to cinemas for films that are major cultural events.

Concert Films Extend the Tour to Theaters

In 2023, “Taylor Swift: The Eras Tour” became the highest-grossing music documentary of all time, earning \$261.6 million at the global box office. **Music films extend concerts to fans in non touring markets and let fans relive the live experience.** While on hiatus, members of Korean superstar group BTS have augmented their solo careers with documentaries via limited cinema releases. Jung Kook’s ‘I Am Still’ came in as the highest grossing music film of 2024 with \$18.5M globally.

DRIVERS

### Elevated Cinematic Experiences

Theatre chains like LOOK Cinema and Alamo Drafthouse have extensive food and beverage offerings as well as varying theatre sizes, and improved seating, making theater going a more well rounded experience.

People will Always Want to Date and Mate

Cinema and theaters remain a steadfast option for date night or to get the kids out of the house.





# A Data Informed Relationships Business

From bookings to playlists, data is shaping the near future of live entertainment more than ever.

KEY DATA	82% of marketers struggle to quantify and qualify event attendee interactions	73% of fans went to concerts as much or more than pre-pandemic levels	Live music revenue grew 26% in 2023
SIGNALS	<p><b>200+ Themed Data Driven Nights a Year</b></p> <p>Burwood Media, home to Emo Night Brooklyn and Taylor Swift dance parties leverage data to <b>determine whether themed events should be scaled nationally or remain market-specific, and make strategic decisions about locations and themes</b> by leveraging historical venue data, ticket sales, and audience metrics.</p>	<p><b>Counter Strike Chooses Brazil</b></p> <p>After the pandemic canceled previously scheduled tournaments for the massive shooting game Counter Strike:GO creator Valve and organizer ESL <b>analyzed player and spectator solidity and location data to identify Rio de Janeiro as the site of it's 2022 world championship</b>, selling out in under an hour.</p>	
DRIVERS	<p><b>Optimization for Informed Decisions</b></p> <p>From routing to stage schedules and personalization touches turning to data like venue capacity, historical performances and ticket prices can take the guesswork out of live event planning.</p>	<p><b>URL Behavior as IRL Indicator</b></p> <p>Historical online behavior can indicate real world preferences. Tapping behavior data to inform decisions is a must. More and more, insights and data teams are vital to identifying data streams that bring value to the event planning process.</p>	



# THE CHALLENGES

# CHALLENGES

Despite post pandemic boom the entertainment industry faces mounting pressures as rising costs strain accessibility and viability, crowded digital spaces increase competition for attention and hamper discovery, while demographic shifts are fragmenting the market.



"The cost of living crisis is creating competition for consumer spending."

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"Maintaining authentic connections and "cutting through the noise" is increasingly difficult in crowded digital/virtual spaces."

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"There is fierce competition for audience attention and spending across entertainment."

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"Cultivating new superfans while understanding their different needs/wants is a balancing act."

# TAKEAWAYS & RECOMMENDATION S



# KEY TAKEAWAYS

## INTEGRATE SOCIAL

Find ways to integrate social into experiences so fans can put their phones down and be more present.

During Jack White's 2022 tour, fans' phones were locked in bags. Immediately after the show, they all got exclusive photos of the show via text to share.

## DEFINE DATA STRATEGY

Leverage comprehensive data to make more informed decisions about everything from event locations to personalized experiences.

Explore personalization blockchain tools that ethically capture and store consumer purchasing and online habits to build profiles and inform decisions.

## MAKE IT A LONG PLAY

Invest in consumers' end-to-end experience. They are cost sensitive and are moved by novelty and what reflects their identities. Competition is fierce, do good!

Put people into your loyalty ladder now, reward early purchasing, and follow your customer's journey. They will thank you for it.

# HOW MIGHT WE...

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## BRANDS

Leverage both digital and physical touch points to create authentic, data-informed experiences that resonate with fans' desire for personalization while fostering genuine connections?

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## ARTISTS

Balance the use of new technologies and immersive elements with authentic fan interactions to create memorable experiences that work across platforms while maintaining accessibility for our core fanbase?

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## ENTERTAINMENT PROPERTIES

Partner with brands and artists to design hybrid experiences that combine the best of IRL and digital engagement, while using data strategically to inform programming and create sustainable, scalable events that audiences are willing to pay for?

# FROM THE INDUSTRY...

“With data scattered across hundreds of ticketing platforms, transparency and shared access to reliable insights are critical for the future of live events.”

– Diana Gremore, Founder & CEO | [RealCount](#)

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“As music becomes less of a thing– a cylinder, a cassette, a disc– and more ephemeral, perhaps we will begin to assign an increasing value to live performances again.”

– David Byrne in his book *How Music Works*

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“There will always be a kid in their parents’ basement trying to tell their story and connect with others to share in the collective pain and joy of those stories. This is always more impactful live.”

– Mark DiPietro, *Modo Live*

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# Reach out! Let's Build.

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