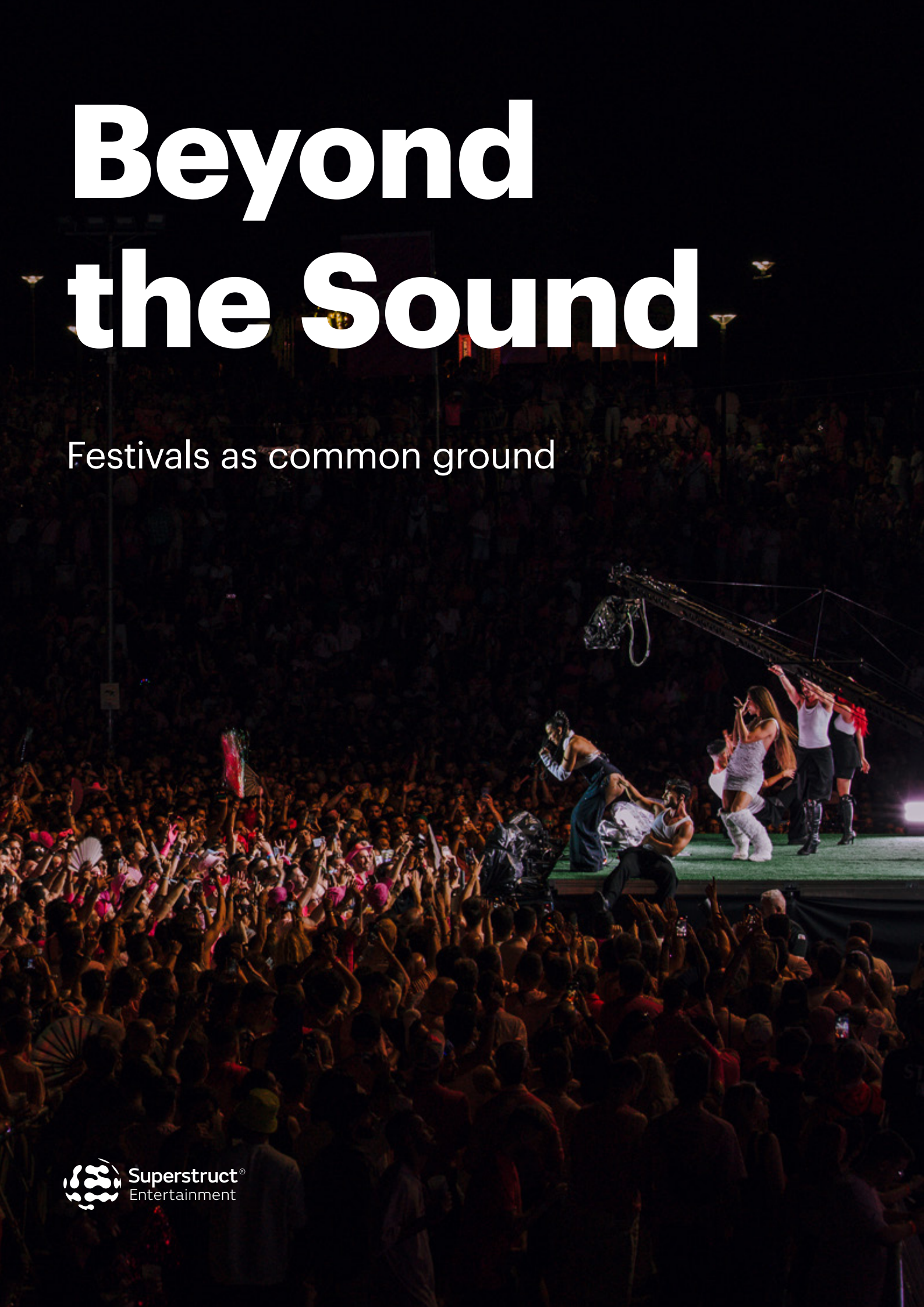
Beyond the Sound

Festivals as common ground



Superstruct®
Entertainment

A note from Alex Mahon



"Live events are one of the last truly communal things we do. In a world that keeps pulling people apart, festivals bring them together, in their thousands and in person, for the simple joy of being there. That matters far beyond the music.

This research gives us a way of seeing how that happens. It shows that there is no single festival experience, and that the magic lives in the particular, the rituals, places, people and quirks that make each festival itself. Our job is to protect that. To homogenise festivals would be to devalue them. To ignore the unspoken rules of festival life would be to break them. To underestimate festival-goers would be to lose them.

Our portfolio spans every kind of festival experience, and we're proud to keep each one true to its own. Because when festivals are free to be fully themselves, they make belonging possible for millions of people, every single year."

— **Alex Mahon**, CEO of Superstruct Entertainment





CONTENTS

Introduction – Why we gather	**Page 4**
If not now, when?	**Page 5**
Four tensions of modern life	**Page 6**
Four ways belonging is built	**Page 7**
Layer 1 – It lifts you out of ordinary life	**Page 8**
Layer 2 – It creates a crowd that recognises itself	**Page 10**
Layer 3 – It turns a crowd into an “us”	**Page 12**
Layer 4 – It makes the bond outlast the weekend	**Page 14**
Different festivals for different summers	**Page 16**
The close – Festivals are social infrastructure	**Page 18**
About the research	**Page 19**
About Superstruct Entertainment	**Page 21**
A note from the field	**Page 22**
Notes	**Page 23**

INTRODUCTION

Why we gather

100+

hours of fieldwork

120+

conversations on the ground

3,000

recent festival-goers aged 18–60, surveyed across the UK, Spain and the Netherlands

To gather is one of our oldest instincts. Long before cities, calendars or clocks, people came together to mark the turning of the seasons, to feast, to dance, to make music, and to feel, for a while, part of something larger than themselves. The modern festival is where that instinct still runs freely. Every year, millions of people cross into worlds built for just a few days, on beaches, in cities, in fields and in deserts. They are made possible by everyone who dreams them up, builds them, plays in them and keeps them running, and by the creators who help make them happen.

This tradition matters, and perhaps especially now. So much of life is spent indoors, arranged by algorithms that sort us into audiences of one. A festival works the other way. It gathers strangers in their thousands, asks little of them beyond their presence, and lets them find one another. Its power lives in its particularity: the character, rituals, place and people that make each festival itself. A festival that could be anywhere ends up belonging to no one.

Drawing on more than 100 hours of fieldwork at five festivals, over 120 conversations on the ground and a survey of 3,000 recent festival-goers aged 18–60 across the UK, Spain and the Netherlands, this report takes the festival apart to see how it works. Its focus is deliberate. Festivals raise practical questions that deserve study in their own right, from safety and welfare to ticket prices and travel. This report looks at the experience itself: what a festival gives people when it goes well, and the psychological and social value that creates.

What emerged is the story of how a crowd of strangers finds common ground: four layers of experience, shared by every festival, through which thousands of separate people become an “us”. Common ground is the space a festival makes. Belonging is what grows there, and it is the deeper subject of this report. The case it makes is simple. In a world that keeps pulling us apart, we crave belonging more than ever, and festivals are one of the last places where we still build it, thousands of us at once. They are social infrastructure, as surely as any park, library or town square.



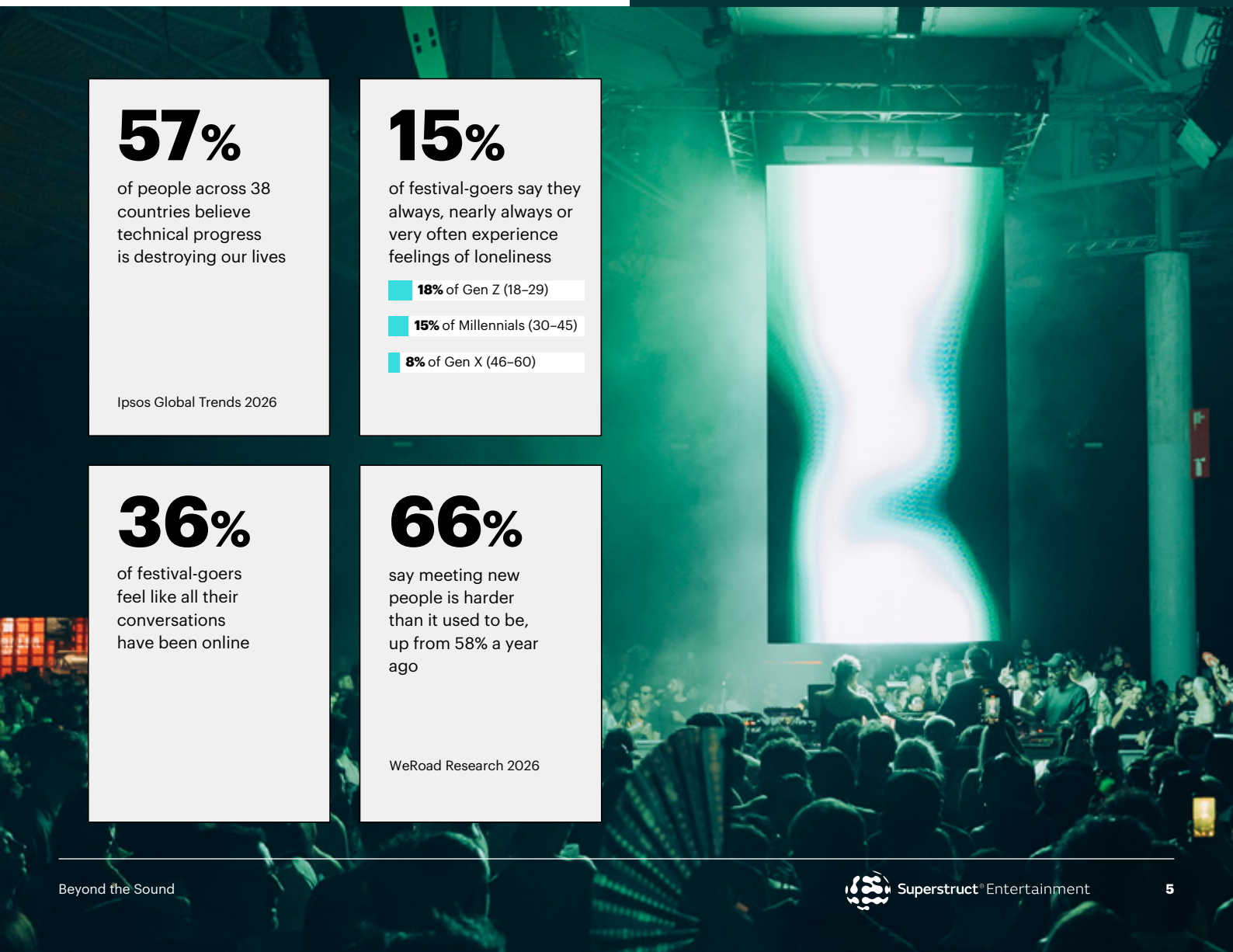
If not now, when?

Modern life poses a real challenge to gathering. It is fast, scheduled, fragmented, individualised and increasingly lived through a screen.

We fly through life solo, with technology serving us all we need, and fewer and fewer things happening en masse. The institutions that once handed us belonging without our asking — the neighbourhood, the workplace, the place of worship — have lost much of their communal pull, and some have disappeared altogether. Spontaneous, shared experience used to happen to us. Now we have to go out and find it.

We all, to some extent, feel this loss. Across 38 countries, more than half of people believe technical progress is destroying our lives. Loneliness has become an ordinary part of life, and it is sharpest among the young: Gen Z, the most connected generation in history, are the loneliest of all. For many, conversation itself has moved online.

> "Neotribal theory says humans have an inherent need for community. We used to get that from very stable institutions — your neighbourhood, your work, religious affiliation. As those became transient, our need for community is no longer met in the same way."
>
> — **Amy Thompson**, Qualitative Researcher, Ipsos



57%

of people across 38 countries believe technical progress is destroying our lives

Ipsos Global Trends 2026

15%

of festival-goers say they always, nearly always or very often experience feelings of loneliness

- **18%** of Gen Z (18–29)
- **15%** of Millennials (30–45)
- **8%** of Gen X (46–60)

36%

of festival-goers feel like all their conversations have been online

66%

say meeting new people is harder than it used to be, up from 58% a year ago

WeRoad Research 2026

Four tensions of modern life

The loss of belonging rarely arrives as one obvious problem. It shows up in small, everyday ways, as a pull between how life is and how we wish it was. Across this research, that pull takes four forms. We call them tensions, each one sets something modern life gives us in abundance against something it leaves us short of.

1 Scheduled vs suspended

Days run by the clock, the calendar and the pressure of constant self-improvement, so that even rest becomes something to plan and optimise. Set against this is the wish to step out of ordinary time altogether, with nowhere to be and nothing to get right.

2 Individual vs collective

The atomised self, curated, performed and often alone, even in company. Set against this is the longing to be part of an "us", one of many and glad of it.

3 Digital vs embodied

Life lived through screens, where friendships are counted rather than felt and conversation happens in text. Set against this is a deep want for faces, physical closeness and warmth, being in the same place as other people, at the same time.

4 Fleeting vs enduring

Experiences that are consumed and forgotten by next week, on feeds that refresh before anything has a chance to settle. Set against this is the need to build something that lasts, shared memories, stories and bonds that keep their value long after the moment has passed.

Festivals relieve all four. They can't change how the rest of the year is lived, but for a few days they tip the balance the other way, out of the schedule, into the crowd, face to face, and towards memories that last. As the rest of this report shows, they do it through a layering of experience that every festival shares.





Four ways belonging is built

Every festival makes its magic in the same way, through four layers, each built on the one before. First, a festival suspends the everyday. Then it creates a crowd that recognises itself. Next, it connects that crowd into an "us". And finally, it makes the bond endure long after everyone has gone home.

Each layer relieves one of the tensions of modern life, and each is carried by an idea with deep roots in anthropology and sociology. Together they trace the whole arc of a festival, from the threshold you cross on the way in, to the mark it leaves afterwards.

The sections that follow take each layer in turn, how the magic is really made, and what it takes to keep it whole.

LAYER 1

It lifts you out of ordinary life

The threshold you cross (liminality).

LAYER 2

It creates a crowd that recognises itself

The rules that change once you're across (the carnivalesque).

LAYER 3

It turns a crowd into an "us"

The bond that forms in that changed space (communitas and collective effervescence).

LAYER 4

It makes the bond outlast the weekend

The mark left after you leave (cultural memory).

LAYER 1

TENSION RELIEVED

Scheduled
↓
Suspended

It lifts you out of ordinary life

Before belonging can form, the festival first has to suspend the everyday.

The festival creates a separate world. It is bounded in space, in time and in mind, and it runs on its own rhythm, anticipation, joy, climax and comedown, in place of alarms, duties, meetings and deadlines. Getting there means crossing a threshold. You show your wristband, walk through the gate, and something in you moves.

People have always had places like this. Anthropologists call the state they create liminal, an in-between space where you have left your ordinary status behind, haven't yet returned to it, and the normal order of things is suspended for a while.[1] For most of human history, thresholds like this came as ritual — initiations and rites of passage undergone at fixed moments in a life. A festival is one people choose freely, as leisure, which makes it one of the clearest modern versions we have.[2]

> "It lets me forget everyday life and dive into your other world, and be ME, not just 'so-and-so's mum' or 'so-and-so's colleague'"
>
> — Post-event survey participant: **Woman**, Gen X, Parookaville

For many people, that first threshold is crossed at the edge of adulthood. Festivals play the same role, and their

44%

of festival-goers say a benefit of music festivals is a sense of release, behind only to building memories with friends and family

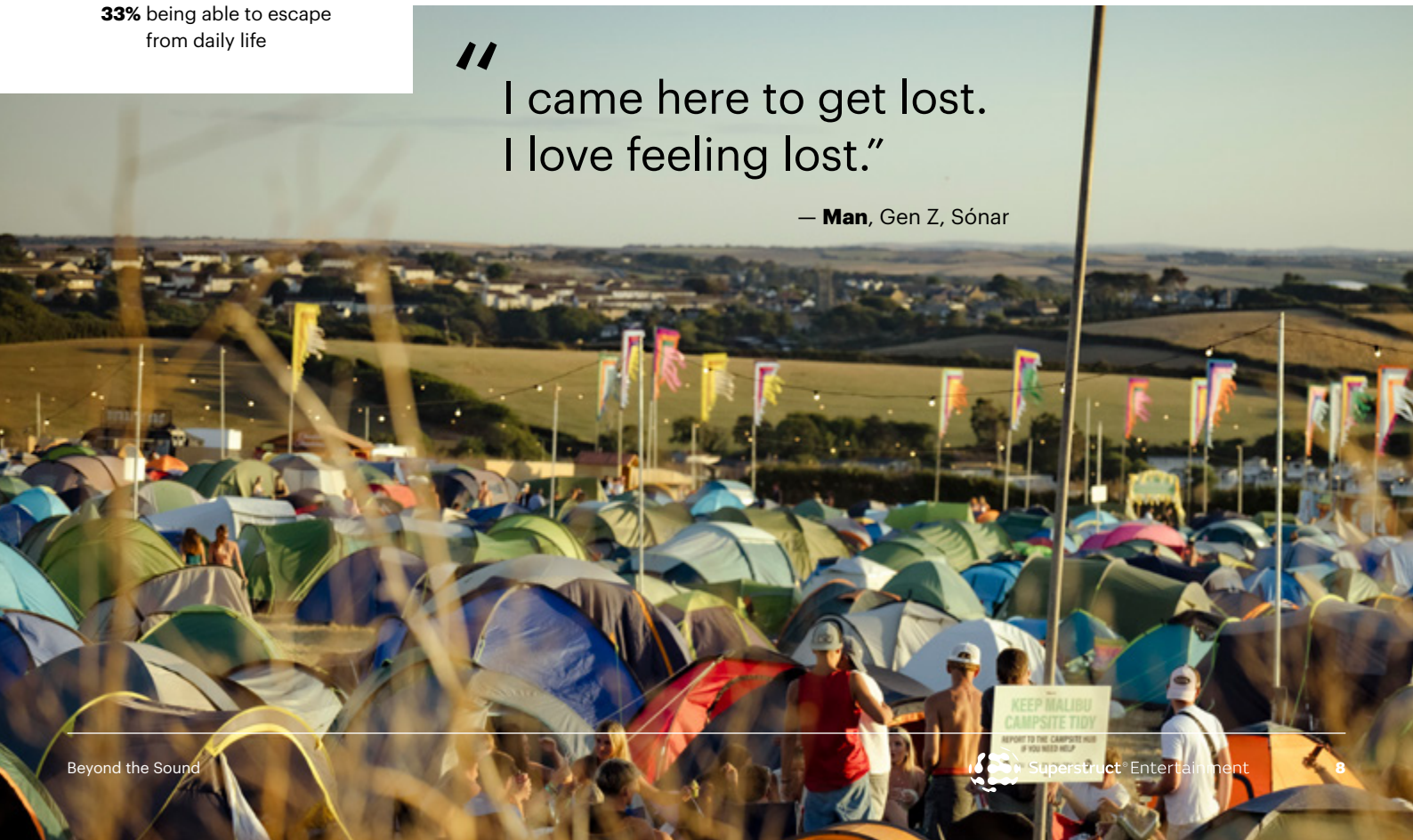
Festival-goers associate festivals with...

46% enjoying live music from my favourite artist/s

40% summertime fun

36% the energy of dancing with the crowd

33% being able to escape from daily life



> "I came here to get lost. I love feeling lost."
>
> — **Man**, Gen Z, Sónar

37%

of festival-goers say being physically present with the music, beyond the digital world, is a benefit of music festivals

72%

of festival-goers say being present matters more than capturing content

thresholds are often among the first that young people choose for themselves. Parookaville is a case in point: for many attendees, it offers a chance to step outside the roles and routines of everyday life and inhabit a different version of themselves.

Because the space is bounded, people feel free to play. To dance without judgement. To be silly. To follow instinct over intention. The setting helps: a beach at dusk, a city transformed overnight, open sky where there is usually a ceiling. Everything about it marks the distance from ordinary life.

In this sense, going to a festival is a kind of pilgrimage back to an older way of being.[3] For a few days, people live in a temporary settlement. Tents pitched side by side, food shared, neighbours met on the walk to the water point. Very few of us have ever lived like this, and yet, once we are there, we seem to know exactly how.

A world at human scale

Part of what the suspension delivers is a return to human scale. Digital life has no edges, it's all endless scrolls and rabbit holes. A festival is a bounded, walkable, knowable world. You can cross it in an afternoon, learn its landmarks by the first evening, and recognise faces by the second day. It offers something modern life rarely does, a whole world small enough to hold, and safe enough to be lost in.

This is also where psychological safety becomes tangible. A legible, human-sized container makes it safe to make a mistake, to ask a stranger for help, or to try something that felt like a risk and come through it smiling. People can let go because the festival world is holding them.

For many, stepping out of ordinary life means stepping away from the phone, and the digital world that comes with it. They notice, and mind, when the festival pulls them back in.

> "A festival is a bubble — a moment and place that exists for a very short time. You exist in a parallel reality where everything is the same, but slightly different."
>
> — **Lamberto Ferrara,** Cultural Strategist, Ipsos

What it means

For festival-goers

A few days at human scale, where faith in other people, and in yourself, can be restored. A counterweight to a life lived at global, digital scale.

For festivals

The suspension is designed, built through site, threshold and time. That bounded, human-scaled world is a civil achievement, and understanding how it works shows what to protect.

For festival partners

The festival is a rare context where people have chosen to switch off from ordinary life. The opportunity for brands is to contribute to and enable what people came for, without creating the wrong kind of friction or pulling people out of the moment.

LAYER 2

TENSION RELIEVED

Individual
↓
Collective

It creates a crowd that recognises itself

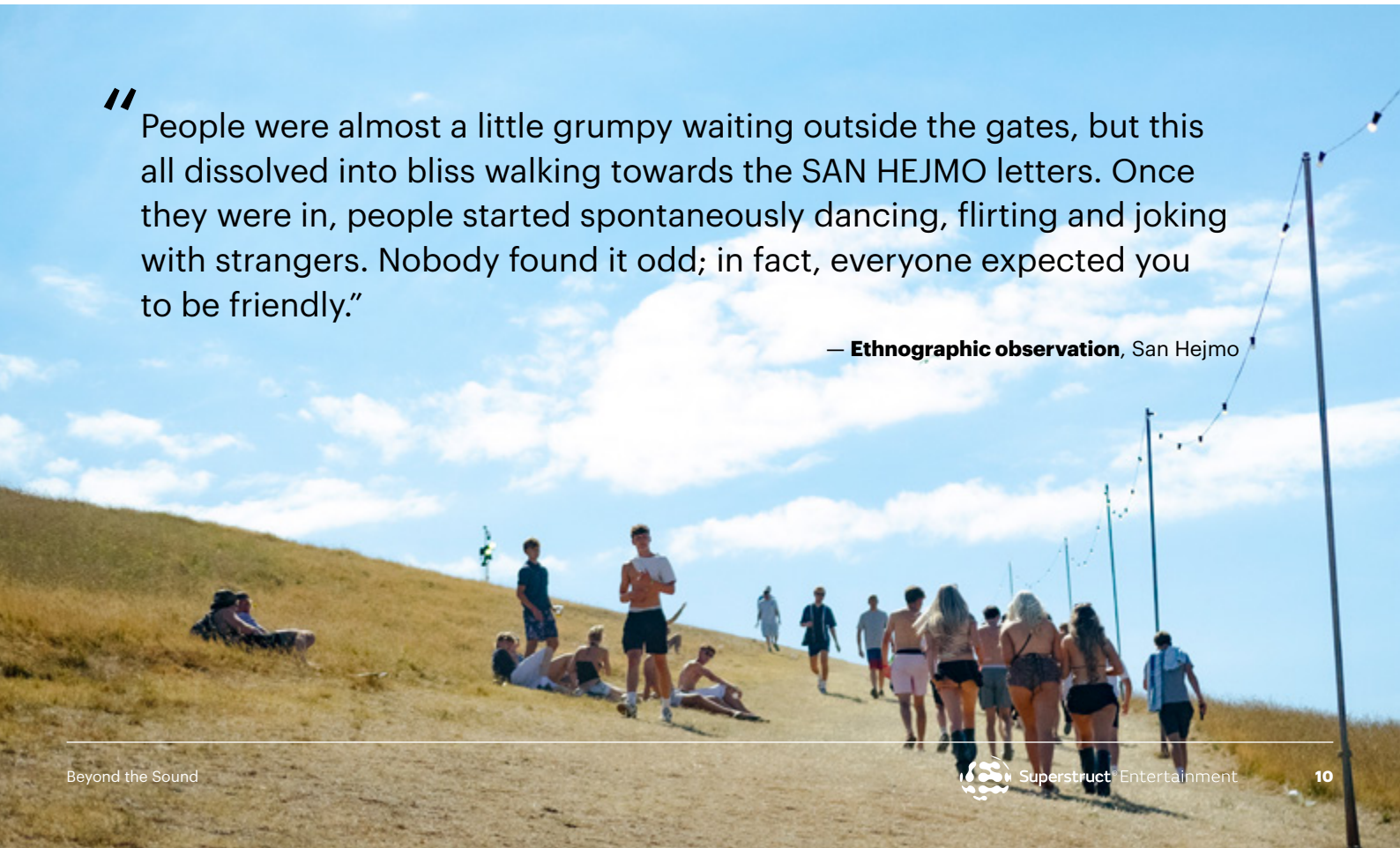
Freed from everyday roles, people show more of themselves, and the crowd learns to recognise itself.

Identity and self-expression
The festival is one of the best stages we have for exploring and expressing who we are, or who we might like to be. Clothing, glitter, adornment, the way people hold themselves and move, it all becomes a form of speech. Everyday life fixes us into roles — a job title, a status, a set way of being seen. The festival loosens their hold.

> "We're dressed riskier than we usually would, because we're at the festival."
>
> — **Woman**, Millennial, Sónar

What emerges is sometimes a hidden, authentic self that ordinary life leaves no room for. Just as often, it is an aspirational one, who a person might be, tried on where the stakes are low and the audience is generous. Carnival has always worked this way. Its masks and costumes celebrate the joy of change and a refusal to be fixed as one thing, and it has no footlights, no line between those who perform and those who watch.[4]

So is festival self-expression authentic, or a performance? Usually both, and happily so. All social life involves some staging; the festival simply turns up the lights.[5] People dress to stand out and to belong at the



> "People were almost a little grumpy waiting outside the gates, but this all dissolved into bliss walking towards the SAN HEJMO letters. Once they were in, people started spontaneously dancing, flirting and joking with strangers. Nobody found it odd; in fact, everyone expected you to be friendly."
>
> — **Ethnographic observation**, San Hejmo

56%

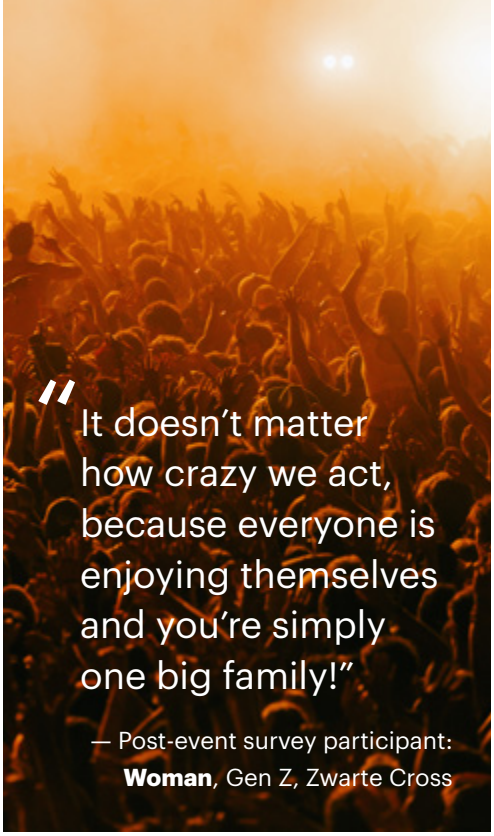
of Gen Z festival-goers say they feel more authentic at music festivals than in daily life, compared with 43% of Gen X

same time, together in difference. Whether any of it lasts beyond the weekend is an open and fascinating question. Either way, these signals are the raw material a festival works with. What people wear and how they carry themselves lets a crowd recognise itself, and see who belongs, and to what.

Rules, norms and rituals

Every festival quickly develops its own rules for how to behave. Some are particular to that festival, inherited as part of its character. People pick them up almost the moment they arrive. Some are loosenings, where ordinary constraints fall away, and behaviour that would draw stares on the pavement on a Monday morning becomes perfectly normal. Others are additions, rituals and shared practices that define the experience and mark you as part of it. Either way, the crowd converges on a shared code, and that code turns thousands of separate individuals into a single social world.

Carnival gives us a name for this, the carnivalesque. In medieval Europe, carnival was a licensed suspension of the everyday order. Hierarchy flattened, the usual constraints lifted, and excess, play and equality were permitted, precisely because everyone knew the space was bounded and would end.[6] It explains why the rules seem to change the moment you arrive at a festival, and why the new ones take hold so fast. Carnival always came with its own temporary code. Superstruct Entertainment's own post-event feedback points the same way, a unique community and atmosphere is the description its festival-goers choose most often.



What it means

For festival-goers

Room to be who you truly are, or to try on someone you might become, and a crowd that reflects it back. A place to find your people, by recognising them and being recognised.

For festivals

A festival's look, rituals and unwritten rules are how a crowd recognises itself. A strong, legible character is what makes belonging possible, so it is something to cultivate and protect. Every choice either builds that character or dilutes it.

For festival partners

A festival is a place where many people are actively working out who they are and signalling it to others. Brands that understand this process and contribute to it can become part of how people express themselves.

LAYER 3

TENSION RELIEVED

Digital
↓
Embodied

It turns a crowd into an "us"

The forces that turn a gathering of strangers into a temporary community.

Once the crowd can recognise itself, something more remarkable happens. People who arrived as strangers start to feel as one, with a shared mood and a shared story. Four forces do the work, moving together, weathering things together, setting status aside, and small acts of looking after one another.

Embodiment: moving together

There is a particular magic in doing the same thing at the same time as thousands of people. Dancing, singing, jumping, swaying as one mass, it is the physical opposite of a life lived as an individual facing a screen. When a group moves and feels en masse, it generates a heightened, almost electric charge. The sociologist Émile Durkheim called it collective effervescence, and believed it was where shared social feeling itself begins.[7]

Sound is a critical part of this. Communities have always been held together partly by the sounds they share. The old parish was defined by the reach of its church bell, if you could hear it, you belonged.[8] At a festival, the main stage does the same job, reaching everyone at once and turning a crowd into an audience, and an audience into a congregation. In everyday life, shared sound has become a rarity.

Friction: weathering it together

A short night's sleep, a long walk between stages, a sudden downpour, or a heatwave. Small discomforts like these, shared with people you can talk, laugh and occasionally cry with, are one of the strongest forces there is for turning strangers into friends. Nobody bonds over a perfectly smooth experience.

56%

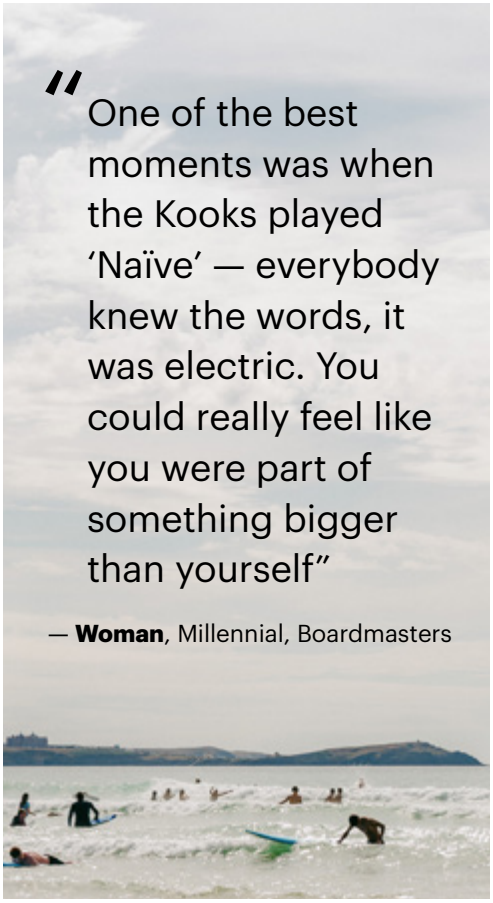
of festival-goers feel closer to others through shared physical experiences at music festivals

46%

of festival-goers say going through the hardships of festival life contributes to authenticity and community

67%

of festival-goers feel their job or social status is irrelevant at a festival



In everyday life, many of us are insulated, wrapped up in our own private routines. Earbuds, for instance, privatise the sounds we hear. Personal listening has become a way of managing daily life, a bubble in which we control our mood and our surroundings, and keep the unplanned encounter at a safe distance.[9] It is sound split from its source and replayed somewhere else, a condition the composer R. Murray Schafer called schizophonia.[10] The festival turns this inside out. You surrender to a shared sonic landscape you can't skip, turn down or choose, but can respond to, together. Sound belongs to a place again, as the ringing of the church bells once did. And gathered in these

66%

of festival-goers agree that music festivals allow them to associate with people who are different to them more than they do in daily life

53%

of festival-goers feel a strong sense of connection to new people they meet at festivals

numbers, a crowd is powerful enough to bust our perfectly personalised bubbles.

Levelling: what matters, matters differently

Inside the festival, the ordinary markers of status lose their grip. Job, income and background count for far less. Everyone is equally muddy, singing equally loudly, equally present. Status takes on a different currency, knowing the shortcut between stages, the best spot for breakfast, where to stand when the headliner comes on. Some of that comes with a VIP wristband, and just as much is earned simply by being there. Once everyone reads as part of the same crowd, the old markers of rank have much less to hold on to.

What forms in their place is a spontaneous bond between people meeting as equals. The anthropologist Victor Turner called it communitas.[11] That unity makes connection across difference possible, building the bridges between unlike people that a healthy society depends on, and that everyday life offers fewer and fewer chances to build.[12]

> "People are so nice. Someone just lent me cotton pads to remove my make-up because I forgot mine."
>
> — **Woman**, Gen Z, Boardmasters

> "Festivals bring together what can feel like quite splintered communities. You go for that elevated feeling of connection — to the music, and to each other."
>
> — **Daniel Nkwocha**, Artist, Music Journalist & Cultural Strategist, Ipsos

Participation: acts of reciprocity

The "us" becomes real through small reciprocal acts. Sharing water. Minding a stranger's spot. Helping someone up or to find their friends. Passing things forward through the crowd. Participation is what turns a crowd into a community. It is also where people practise community itself. Small kindnesses and acts of looking out for one another that make the whole place feel safer, and that can outlast the weekend.

What it means

For festival-goers

The connection you feel to strangers is real, built through moving together, weathering things together and setting status aside. Festivals are one of the few places left where it still happens.

For festivals

These four forces carry the experience. Whatever comforts are offered to people who want to keep their trainers clean and their sleep deep, they should never get in the way of the forces that create the "us" for everyone else.

For festival partners

The "us" is open to brands on its own terms. Brands that add to embodiment, levelling and reciprocity are welcomed in; brands that stand apart from it can be felt as intrusions.

LAYER 4

TENSION RELIEVED

Fleeting
↓
Enduring

It makes the bond outlast the weekend

The strongest festivals live on as an imagined community.

The gates close. The stages come down. Everyone goes home, unpacks, sleeps for 14 hours. And yet something stays.

Some festivals create more than a temporary collective. They create a community that lasts. Like a nation, it binds together people who may never meet, an imagined community, held by a shared sense of belonging.[13] It is sustained by the knowledge that "you were there too", and by stories, shared values and artefacts, the polaroid, the wristband, the group chat that stays alive all winter, the hoodie that draws a knowing nod on the train, the in-joke that makes no sense to anyone else. Over time, the festival takes on the character of an institution.

> "So many highlight memories of my life so far were made at Boardmasters. I'll carry them with me forever — it was such a special time"
>
> — **Man**, Gen Z, Boardmasters (his first ever festival)

Many festivals support and sustain this broader imagined community, in part through offshoot events built around the main event, and loyalty offers that reward the people who come back year after year.

> "My daughter has been every year since she was born and she turns 12 this year. It's an institution within our family and friend group. Annual pilgrimage."
>
> — Post-event survey participant: **Woman**, Gen X, Tramlines





63%

of festival-goers agree festivals show them how to be more open and spontaneous in daily life

53%

of festival-goers say building memories with friends and family are a benefit of festivals

But they also create this community through the annual basic provision of space for collective joy, connection and belonging. For the individual, a festival can become a self-defining memory, a fixed point people date the rest of their lives around.[14] The summer I met them. The year everything changed. For the group, it becomes something closer to cultural memory, kept alive through ritual

Much of that remembering lives in the body, in practices repeated together, the same songs, the same place, the same rituals, year after year.[16] It builds a tight, inward sense of "us", the bonding counterpart to the bridges built across difference in the crowd.[17]
The festival becomes a kind of community currency, something you can spend years later to recognise a fellow member, across a bar or an office or a continent.

And people carry the festival home in subtler ways too — in how they act, and who they are willing to be.



What it means

For festival-goers

You come home with more than memories, formative experiences, discoveries about yourself, and membership of an "us" you carry into daily life long after the weekend ends.

For festivals

A festival lives far beyond its weekend. Value compounds after the gates close, through artefacts, mythology and the returning "us", which makes a festival an institution to be looked after across years.

For festival partners

The bond outlasts the event, and so does association with it. A brand's physical presence at a festival may last three days, but it can leave a lasting imprint on people's identities and memories.

Different festivals for different summers

67%

of festival-goers have attended more than one festival in the past two years

Every festival builds belonging through the same four layers, but no two feel quite the same. Each has its own character, the rituals, places, people and quirks that make it itself, and that people come back for.

> "People don't want you to mess with the traditions of a festival just for the sake of it. They want to know there's some element of dependability there."
>
> — **Daniel Nkwocha**, Artist, Music Journalist & Cultural Strategist, Ipsos

Our research suggests most festival-goers move between festivals, choosing different ones for different yearnings, a familiar favourite where everything is just as it should be, a line-up full of sounds you haven't heard yet, a weekend with no plan at all. And they feel far more than one thing at any of them. The mix shifts across a life, too, who we are at 19 asks something different of a festival from who we are at 35, or at 50.

Because each festival's character is particular, what sustains one can unsettle another. Change a cherished tradition for the sake of change, and people feel the loss. Let the programme start to look like everyone else's, and the sense of discovery fades. Plan every corner in advance, and there is no room left to roam.

How partners fit

Young festival-goers are open to brands, on clear terms. Boiler Room, the music platform known for its live-streamed DJ sets, asked its own audience of 18–34-year-olds about brands for its 2025 Audience Report. 65% said they were comfortable with brands in cultural spaces as long as the pairing feels authentic,



> "Very different from same kind of festivals in other European cities. Completely unique and a reason to visit Helsinki."
>
> — Post-event survey participant: **Woman**, Gen X, Flow Festival



and 62% were willing to pay more for a brand they believe is genuinely invested in supporting culture.

A festival's character is the first test of whether a brand belongs there at all. Within it, partners tend to be welcomed when they do one of three things for festival-goers, make the festival easier (sun cream when the heat arrives, a supermarket at a camping festival, phone signal when you need it), invite connection (games, activities, conversations worth joining), or add to the festival's story and programme (a secret stage hidden somewhere unexpected).

Partner examples:

- DGTL x L'Oréal Paris: "Bike Buddies" crews cycle festival-goers home after dark, tackling street harassment.
- Tuska x Saucony: "Run Like Hell" training sessions, starting in May, get metal fans "pit-ready" seven weeks before the festival.
- Lost Village x DHL: hidden warehouse club "Depot No. 4" with a surprise DJ, plus app-alerted DHL merch collection.

> "Some festivals, like Sónar, I get excited about because you never know what you're going to get. Then there are smaller ones I go to every year precisely because I know exactly what I'm going to get, who I'm going to see, what I'm going to experience."
>
> — **Woman**, Millennial, Sónar

What it means

For festival-goers

They want different things from different summers, and a way of understanding why one festival can feel like a familiar favourite while another feels like a step into the unknown, and why both can matter enormously.

For festivals

A festival's character is what people come back for. The more clearly a festival understands what makes it itself, the better it can protect that as it grows and changes.

For festival partners

A way to choose festivals by fit as well as by audience size, and to shape activations around the character of each one.

THE CLOSE

Festivals are social infrastructure

One of the last places where the conditions for real connection still exist.

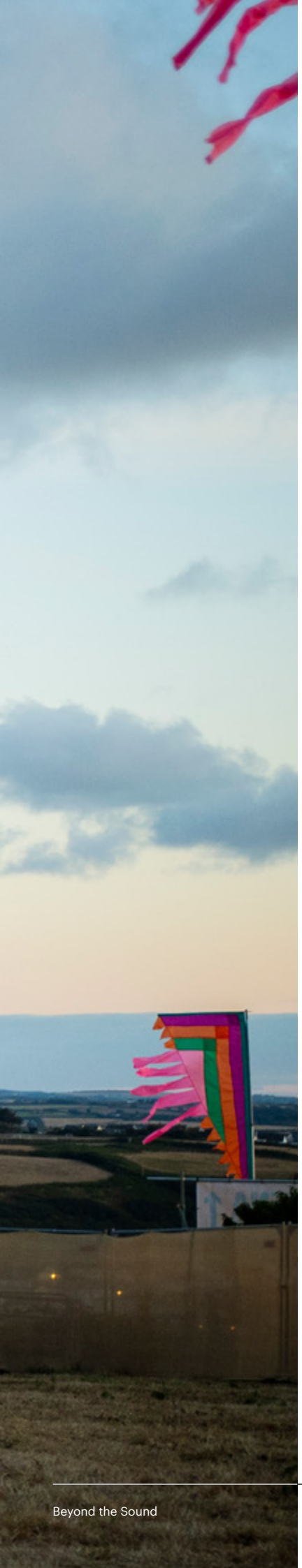
Every festival that returns year after year builds a community of its own. Together, they build something larger, “the festival” as a cultural institution, an idea people carry in their heads long before they arrive. It’s why a first-timer already half-knows how to behave. They arrive having absorbed the wider idea of the festival, with rituals, rules and expectations handed down by everyone who came before them.

That institution is made of every kind of festival there is. Each builds belonging by its own route, and each is, in its way, a return to life as it was once lived, gathered, communal, and at a scale people can hold.

This is why festivals matter far beyond the music. We crave belonging, and modern life doesn’t always make it easy to find. Festivals offer common ground, through four layers of shared experience, for millions of people every year. They are social infrastructure as surely as any park, library or town square. Protecting the full range of them, and keeping each one true to its own character, is how belonging stays within reach of everyone who goes looking for it.

Finding common ground becomes a common good.





About the research

Superstruct Entertainment commissioned Ipsos to explore the cultural value of festivals, what people go looking for, what they find, and what they carry home.

The project was led by Dr Monique Centrone, head of Ipsos' Culture + Futures practice in Strategy3. She also led the fieldwork in person. Her specialism in culture and brand, and how meaning, ritual and collective experience shape behaviour guided the study from start to finish. It took researchers onto festival sites to watch rituals as they unfolded, set the visual language of each festival alongside what people said about it, and grounded the findings in the anthropology and sociology of gathering.

The study combined three strands of evidence, designed to show both the scale of what festivals do and the texture of how they do it.

Quantitative

Ipsos UK conducted an online survey between 22 and 28 March 2026 among 3,000 music festival-goers across three markets: the UK (n=1,000), Spain (n=1,000) and the Netherlands (n=1,000).

A music festival-goer was defined as an adult aged 18–60 who reported attending at least one music festival within the previous two years.

Data collection was through an online self-completion survey via the Ipsos Digital Platform. Quotas were applied to ensure sufficient representation across key audience groups of interest, including age and gender. Age quotas were set to achieve 40% Gen Z, 40% Millennials and 20% Gen X, while gender quotas were set to an equal split between men and women.

As the study was designed to understand the views and behaviours of festival-goers rather than to represent the wider population in each market, results are presented unweighted. Aggregate findings are reported as an average across the three participating countries and should be considered indicative of the views of surveyed festival-goers rather than representative of national populations. Comparisons between groups should therefore be interpreted as directional rather than nationally representative.

Fieldwork formed part of a broader research programme conducted by Ipsos UK on behalf of Superstruct Entertainment between February and April 2026.



Ethnographic

Researchers spent more than 100 hours on the ground at five festivals — Mighty Hoopla, Tramlines, Boardmasters, Sónar and San Hejmo — observing and speaking to more than 120 festival-goers. The festivals were selected to capture variation in geography, setting, musical programme and audience profile, encompassing events in the UK, Spain and Germany and including urban, coastal and camping-based experiences.

On site, researchers used an intercept approach, inviting festival-goers to share their experiences before beginning a conversation or any focused observation. Recruitment was purposive rather than statistically representative, researchers sought a varied cross section of attendees by gender, age, and social configurations such as including people attending alone, as a couple, in friendship and family groups. Fieldwork combined informal interviews with observation of how attendees used festival spaces, interacted with one another and responded to different moments and environments.

A further 15 contributors took part in digital ethnography. Potential participants were invited through a mailing list of ticket holders and completed a screening questionnaire. From the eligible respondents, participants were purposively selected to provide a mix of genders and ages, first time and experienced festival-goers, campers and non-campers (where relevant to the festival), and attendees holding single-day and multi-day tickets. Selection also considered participants' willingness to contribute throughout the research period and their confirmed plans to attend a Superstruct Entertainment festival during summer 2026. Participants documented their experience before, during and after attending, allowing the research to follow how expectations, emotions and interpretations developed over time.

In addition, six under-25 year old festival goers also participated through a combination of interviews and accompanied or observed festival visits, providing additional depth on festival experiences and expectations.

Expert interviews and semiotics

Five experts were interviewed. Experts were chosen as they either had a background in analysing culture from a behavioural science to cultural strategy background or had done academic research into festivals themselves.

Semiotic ethnography was also employed: the Ipsos project lead, a cultural sociologist, and two additional team members, cultural strategists and experts in behavioural observation, cultural communication and experience design attended alongside. Five festivals were attended in total, hundreds of images were analysed and reviewed as observational evidence.

About Superstruct Entertainment

Superstruct Entertainment is a British founded, owned and operated live entertainment group, home to more than 80 festival and live event brands globally. Its portfolio includes some of the most respected and culturally significant events in the world, such as Mighty Hoopla, Wacken Open Air, Lost Village, Flow, Defqon.1, Sónar, Zwarte Cross, Arenal Sound, Øya, Parookaville and Boardmasters.

Superstruct's approach is built on creative independence. The group partners with founders and local teams to help festivals grow while preserving the identities, communities and cultures that make them unique. While operating at international scale, its festivals remain locally led and deeply rooted in the places and communities they serve. Combining entrepreneurial creativity with operational expertise, Superstruct supports millions of people each year to come together through live experiences, music and culture.

For more information, visit: **https://www.superstruct.com/**





Notes from the field

People travel a long way to a festival and arrive feeling they've come home. Within the first hour the wristband goes on, the signal drops, a stranger offers you sun cream, and the rules of ordinary life start to loosen. The task we set ourselves was to find out how that happens, explain why it matters, and understand what it says about the world people have travelled from to find it.

To do that, we spent time at festivals and drew on Ipsos's world-class research (surveys, ethnography and semiotics) alongside our expertise in sociology and anthropology. But no single dataset held the story. It came from being there, walking the sites, joining the queues, staying late, listening. Being in the field myself is what let me connect the numbers to what people actually lived, and see the bigger story they added up to.

That story is of festivals as one of the few places left where people can step out of ordinary time, find each other and carry some of it home. In a world increasingly mediated, sorted and optimised, festivals protect something communal. They are a sort of homecoming to our own humanity, and the relevance of that today lives well beyond the festival itself.

My thanks to every festival-goer who let us into their bubble.

Dr. Monique Centrone
Head of Culture + Futures at Ipsos Strategy3

Beyond the Sound started with a simple question: what are people really taking away from festivals beyond the line-up, the ticket sales and the satisfaction scores?

As the project unfolded, I was struck by the depth of what people shared with us. Across different festivals, countries and audiences, many described these experiences as an important part of how they connect, recharge and spend time with others. The stories themselves were very different, but the importance people placed on them wasn't.

What stayed with me was how often people talked about festivals not just as events, but as markers in their lives. Weekends they look forward to for months, experiences they return to in conversation years later, and memories that continue to shape friendships, relationships and a sense of identity long after the gates close.

This report brings together those perspectives and explores what they can tell us about the place festivals hold in people's lives today.

Thank you to everyone who shared their time, experiences and stories with us.

Luiza Fortuna
Research & Insights Lead, Superstruct Entertainment

Notes/Citations

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2. Victor Turner, 'Liminal to Liminoid, in Play, Flow, and Ritual' (1974), reprinted in From Ritual to Theatre: The Human Seriousness of Play (1982), on the 'liminoid': liminal-like experiences people choose in modern leisure.

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4. Mikhail Bakhtin, Rabelais and His World (1965; English translation 1968), on the carnival mask and on carnival as a spectacle without footlights.

5. Erving Goffman, The Presentation of Self in Everyday Life (1959), on social life as performance, with its front and back stages.

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10. R. Murray Schafer coined 'schizophonia' in The New Soundscape (1969) and develops it in The Tuning of the World (1977), reissued as The Soundscape: Our Sonic Environment and the Tuning of the World (1994).

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15. Jan Assmann, 'Collective Memory and Cultural Identity' (1988; English translation 1995), which distinguishes everyday communicative memory from longer-lived cultural memory.

16. Paul Connerton, How Societies Remember (1989), on memory carried through bodily practice and commemorative ritual.

17. Robert D. Putnam, Bowling Alone (2000), on bonding social capital.

Copy of the data tables are available here


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