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Did You Catch The Opener?...Exploring the Transformative Dynamics of Opening Performances: A Quantitative Analysis on Streaming for Emerging Artists

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Abstract

This paper explores the impact of emerging artists serving as opening acts on larger tours, and how this exposure affects streaming metrics and audience growth. As the live music industry rebounded in 2023 and 2024, many smaller artists sought to benefit from this increased demand by opening for established acts. The study utilizes data from Pollstar, Songkick, and Chartmetric to analyze monthly listenership patterns before and after tours, tracking streaming metrics for 57 opening artists. Consumer and artist surveys offer further insights into the perceived value of these opportunities.

Results suggest that while opening for major acts can lead to an immediate increase in streaming numbers, this often does not translate into long-term audience retention. Developing artists saw significant spikes in streams during tours, followed by a sharp decline post-tour, while more established acts showed more stable engagement. Consumer surveys reveal that while audiences may not buy tickets specifically to see openers, they often discover new music during these performances, with many continuing to follow opening artists after the tour. These findings highlight the complex dynamics of touring as a growth strategy for emerging artists in a competitive live music market.

Keywords

live music • streaming • Chartmetric • Pollstar • transformative dynamics • touring

Introduction

The live music industry experienced a remarkable resurgence in 2023 and 2024 as audiences and artists returned to concerts after the downturn caused by the COVID-19 pandemic. With this resurgence came unprecedented demand for live performances, with ticket sales and audience engagement reaching new highs. According to Pollstar, grosses for the 2023 Worldwide Top 100 Tours increased by 46% to $9.17 billion from $6.28 billion in the previous year, with total ticket sales rising 18.4%, from 59 million to 70 million; average tickets sold per show up 24.25% from 14,570 to 18,103 (Gensler & Allen, 2023). As a result, opportunities for smaller, emerging artists to join tours as opening acts have expanded, offering them exposure to larger audiences. However, while these opportunities appear promising, the tangible benefits of serving as an opening act remain uncertain. Emerging artists, often struggling to break through in a crowded and competitive industry, face considerable challenges in gaining visibility. In particular, the relationship between performing as an opening act and long-term career growth, as measured by streaming metrics and audience engagement, has not been thoroughly examined. While it is commonly assumed that opening for larger artists boosts exposure, the extent to which this translates into sustained fan acquisition or streaming success is still uncertain.

This study seeks to address these gaps by exploring two key questions: 1) Does performing as an opening act offer substantial growth in streaming numbers for emerging artists? 2) How do consumers perceive and engage with opening acts during live performances? Using a combination of data from Pollstar, Songkick, and Chartmetric, along with survey responses from both consumers and artists, this research aims to provide a comprehensive analysis of the dynamics between opening performances and artist visibility.[1]

By examining streaming metrics before and after tours, as well as consumer perceptions of opening acts, this study contributes to the growing body of research on live music's impact on emerging artists. Findings will offer new insights into the strategic value of opening performances and inform future decisions for artists seeking to leverage touring opportunities for career development.

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Literature Review

Market Signaling and Affiliations in the Music Industry

Emerging artists face considerable barriers to legitimacy and visibility within the music industry, a challenge known as the "liability of newness" (Stinchcombe, 1965; Freeman et al., 1983; Yang & Aldrich 2017). This concept is particularly relevant to live performances, where opening for more established acts is often a critical step toward achieving legitimacy. Spence (1974) posits that affiliations with high-status partners serve as implicit endorsements, enhancing the perceived value and legitimacy of the lesser-known act. In the music industry, opening for a high-profile artist can signal quality and credibility to audiences and other industry stakeholders (Jensen, 2003; Pollock et al., 2010). This "borrowed legitimacy" is not unique to the music industry, but is also observed in other cultural industries such as film and fashion, where endorsements by high-status individuals or brands elevate newcomers (Kim & Jensen, 2013). In live music, the affiliation between opening acts and headliners serves as a form of social capital, where associations with well-known artists can elevate the opening artist's profile, leading to increased attention and credibility (Bourdieu, 1986; Coleman 1988; Stuart et al., 1999; Adler & Kwon, 2002).

In niche music markets, such as independent or alternative music scenes, the role of curated festival lineups has become a vital part of signaling value. Festivals often act as gatekeepers, with smaller acts gaining legitimacy through their inclusion in festival lineups, where association with high-status headliners acts as an indirect endorsement (Bennett, Taylor, & Woodward, 2014).

However, smaller artists face significant challenges in this environment. This is evident in the impact of radius clauses in festival contracts, which prevent artists from performing in nearby locations. While larger artists may be able to negotiate more favorable terms, smaller artists may struggle as these clauses limit their opportunities for exposure and performance, hindering their growth (Apruzzese, 2020). This phenomenon underscores the broader role of strategic affiliations in the music industry.

Consumer Behavior in Live Music and Streaming

Consumer behavior toward live music attendance has been studied extensively, with research highlighting the experiential and social motivations for attending concerts (Brown & Knox, 2017). These motivations often focus on the headlining artist, with attendees prioritizing familiarity and the social experience over discovering new music. However, the live performance context still serves as a key site of music discovery for many consumers. The "experience economy" (Pine & Gilmore, 1998) helps explain how live concerts are framed as more than just musical events; they are part of a larger cultural and social experience that creates opportunities for discovery.

As streaming platforms continue to dominate the music landscape, the dynamics between live music and digital music consumption are evolving. Platforms like Spotify and Apple Music employ a combination of algorithmic and human curation to personalize recommendations, creating a unique form of "algo-torial power" (Eriksson et al, 2019). This hybrid approach allows platforms to act as gatekeepers within the music industry, blending human expertise with data-driven insights to influence the "listening agendas" of global music consumers (Bucher, 2017). This has significantly reduced the barriers to users to discovering new music, while also shaping consumption patterns in a way that surpasses traditional music intermediaries. However, live performances remain critical moments of exposure where consumers might engage more deeply with unfamiliar artists. Schwartz's (2009) "paradox of choice" theory, which posits that an overabundance of options can lead to decision paralysis, is particularly relevant here: in an oversaturated market of both live and digital content, consumers tend to stick to familiar choices.

The disconnect between digital discovery and live performance discovery requires further exploration. While algorithms can increase short-term exposure on streaming platforms, their effect on long-term fan retention remains uncertain (Datta et al, 2018). This is especially relevant for artists who perform as openers, as live exposure does not always translate into sustained streaming growth.

The Role of Streaming and Social Media in Artist Growth

Streaming has become a crucial metric in evaluating an artist's visibility and success in the digital age. However, the "attention economy" (Hesmondhalgh, 2018) framework underscores the challenges smaller artists face in maintaining sustained attention in an increasingly fragmented marketplace. Artists who open for larger acts may see temporary increases in streaming numbers, but translating this into long-term engagement is a complex and under-researched area.

Much of the research on the impact of streaming platforms focuses on how algorithms, paired with human curation, shape discovery and engagement. Spotify's Discover Weekly, for instance, is built on algorithms that incorporate user data and social signals, suggesting artists based on past listening habits (Morris, 2015). This can create a feedback loop where consumers are exposed to new music but may not fully engage unless multiple touchpoints, such as live performances or social media presence, reinforce the recommendation (Barna, 2017). As research indicates, the influence of streaming platforms on visibility and attention is significant, impacting both emerging and established artists. For emerging artists, social media can also act as a tool for sustained engagement following a live performance (Baym, 2013). Artists who leverage platforms like Instagram and TikTok to maintain visibility post-tour may better capitalize on the exposure gained from live performances. However, research indicates that the relationship between social media activity and long-term streaming growth is highly variable and genre-dependent (Hesmondhalgh, 2018).

Cultural and Economic Barriers for Emerging Artists

Touring is one of the primary ways artists generate income, but the economic model for smaller acts is increasingly precarious. Many emerging artists rely on opening for more established acts as a means of exposure, but the financial returns are often minimal, if not negative (Page, 2011). Independent artists frequently tour at a loss, shouldering travel, accommodation, and marketing costs with the hope that exposure will lead to long-term career growth (Marshall, 2013).

The economic challenges of touring were exacerbated by the COVID-19 pandemic, which greatly disrupted the live music sector. Many venues struggled to survive, and numerous independent promoters faced closure due to the challenges posed by the pandemic. While livestream performances emerged as an alternative, offering artists new revenue streams, the level of exposure and audience engagement from these virtual events often fell short of that achieved through traditional, in-person performances (Apruzzese et al, 2020). This highlights the continued importance of live performances, particularly for emerging artists seeking to build an audience through opening act opportunities.

Diffusion of Innovation and Network Theory

The dynamics of opening for larger artists can also be understood through Rogers' (2003) Diffusion of Innovation theory, which explains how new ideas or products (in this case, emerging artists) spread through a population. According to this framework, early adopters of new music — such as fans of headlining acts — can influence the wider audience's willingness to engage with an opening act. However, the rate of adoption may depend on factors such as the genre fit between the headliner and the opener, as well as the degree of promotion by both the headliner and external media.

Network theory also offers a useful lens for understanding how relationships between headliners and openers create network effects, where fans of a headliner might be more likely to engage with an opening act simply due to the social and cultural capital embedded in their association (Podolny, 2001). This theory also speaks to the importance of genre and audience alignment. If the musical styles of the headliner and opener are mismatched, the network effect may be minimized or even negative, leading to a disconnect between the two fanbases.

Research Design

This study was designed to investigate the impact of smaller artists opening for more established acts and whether or not this leads to visibility and market engagement. To create a population, this study utilized data from Pollstar, a trade industry website, to identify the top 10 tours for 2022 and 2023. Detailed information about the opening artists for these tours was subsequently collected using the website Songkick to ascertain their identities and touring schedules. This process resulted in a sample of 57 opening artists associated with these tours. Changes in engagement with these artists were tracked by measuring Spotify monthly listenership through Chartmetric for each of these tours. The analytical framework involved examining the monthly listenership data for four weeks before the tour started and four weeks after it concluded. This temporal framing was intended to capture any fluctuations in listenership directly associated with the artists' participation in the tours. Importantly, genre differentiation was not incorporated into the study design to maintain focus on the influence of tour participation across diverse musical styles. Furthermore, the study compiles historical data about the top 100 tours from 2002 to 2023 to identify what the genre trends are in the live music space. The music website AllMusic was used in order to identify the genres of each artist.[2]

Additional data were collected through two surveys aimed at gaining insights from both consumers and artists. The consumer-focused survey was administered via the Music Connect website, garnering responses from 525 participants concerning their concert attendance habits and engagement with opening acts. The artist survey was distributed using a snowball sampling technique, in which initial respondents were asked to refer other artists within their networks to participate. This method allowed the survey to reach a broader group of participants through recommendations from the initial group, ultimately resulting in responses from 47 artists. This survey targeted artists who had experience as opening acts, seeking to understand their perceptions of the impact of such engagements on their careers. In addition, Chartmetric's ranking system — which categorizes artists as "developing," "mid-level," "mainstream," "superstar," and "legendary" — was employed to classify the sampled artists according to their career stage. The genre for each artist was also identified using the AllMusic website to provide contextual data on each artist's musical category. This methodology was structured to provide a comprehensive analysis of how opening for larger acts might affect smaller artists' market visibility and career progression, addressing a notable gap in the existing literature on music industry dynamics.

The tables in figure 1 display all the tours and openers studied in 2022 and 2023. Figure 2 displays all of the genres that were present in the sample size, as well as the various stages of the artists' careers.

Headliner	Opener(s)	Dates
Bad Bunny	Alesso	2/9-10/1
	Diplo	
Elton John	None	n/a
BTS	None	n/a
Morgan Wallen	HARDY	2/9-10/1
	Larry Fleet	
Eric Church	Jelly Roll	1/7-9/3
	Hailey Whitters	
Eagles	None	n/a
John Mayer	Alexander 23	2/17-7/16
	Yebba	
Genesis	None	n/a
Garth Brooks	Mitch Rossell	2/4-10/2
	Ghost Hounds	
	Trisha Yearwood	
Dua Lipa	Megan Thee Stallen	2/9-12/9
	Caroline Polachek	
	Lolo Zouaï	

Headliner	Opener(s)	Dates
Taylor Swift	Paramore, Haim, Phoebe Bridgers, Beabadoobee, Girl In Red, Muna, Gayle Gracie Abrams, Owenn	3/17 - 8/9
Beyonce	DJ Khaled	7/12 - 10/1
Morgan Wallen	ERNEST, Bailey Zimmerman, HARDY, Parker McCollum	2/20 - 11/18
Drake	Skillibeng, Sleepy Hallow, Central Cee, Sexyy Red, Zack Bia, and Lil Yachty	6/29 - 10/9
P!NK	Grouplove, DJ KidCutUp, Brandi Carlile, Pat Benatar & Neil Giraldo	10/12 - 11/18
Bruce Springsteen & The E Street Band	None	n/a
Ed Sheeran	Budjerah, Cat Burns, Denise Chaila, Dylan, Griff, Khalid, Maisie Peters, Rosa Linn, Russ, and Calum Scott	4/10 - 10/28
George Strait	Chris Stapleton, Little Big Town	5/6 - 11/28
Karol G	Agudelo888, Young Miko, Bad Gyal, Mar Mejía, Jhay P, Nath, Soley, Nejo, and Ryan Castro	8/3 - 9/28
RBD	None	n/a

Figure 1. Headlining acts, openers, and tour dates via Pollstar.

Genre			Career Stage	
Pop/Rock	26		Developing	7
Country	10		Mid-level	5
Latin	9		Mainstream	21
Hip-Hop	8		Superstar	25
Dance	1		Legendary	0
Dancehall	1			
Folk	1			
R&B	1			
Electronic	1			

Figure 2. Distribution of Genre and Status via Chartmetric.

Results

The analysis of streaming numbers for artists who opened for larger acts was conducted at both macro and micro levels to identify patterns related to high-profile tours, including Taylor Swift's 2023 *Eras* Tour. This approach aimed to explore the "Taylor Swift effect," a term describing Swift's profound influence across various sectors including culture, economics, and media. Her fanbase is known to drive significant consumer engagement, demonstrated through phenomena from increased voter registrations to surging NFL viewership after her attendance at a game — which led to a 400% rise in sales of Travis Kelce's jersey (Fatemi, 2023). In this context, the research focuses on how association with a globally-recognized artist can elevate lesser-known opening acts, reflecting Swift's broader influence on audience behavior and market dynamics (Bibey, 2023; Lansky, 2023; Chayka, 2023). This phenomenon illustrates the economic power of fandom and highlights the value of strategic alignment to expand market reach.

Macro-Level Analysis

The macro-level analysis focuses on categorizing artists by their career stage according to Chartmetric rankings, and by genre for the years 2022 and 2023, with an additional combined analysis. Notably, there are no mid-level artists in the 2022 sample. The findings indicate a distinct pattern in the impact of touring on streaming numbers:

Developing Artists: Showed a notable increase of approximately 18% in streaming numbers leading up to and during the tour in 2022, followed by a subsequent decrease of 6% after the tour's conclusion.

Mainstream Artists: Experienced smaller increases and decreases in streaming numbers, suggesting a more stable audience engagement throughout.

Superstar Artists: Unlike other categories, superstar artists not only maintained but also increased their streaming numbers post-tour, underscoring the benefit of sustained high visibility.

The genre analysis for 2022 revealed significant variability in impact across different music styles. Pop, rock, country, and hip-hop genres exhibited the most substantial increases in streaming numbers, with pop rock showing the largest decline post-tour. This trend mirrors the historical dominance of these genres in live music tours, as evidenced by a separate analysis conducted of Pollstar's top 100 tours over the past 21 years. To quantify this, a sample of 2,100 artists were gathered via Pollstar, which was used to identify the top 100 tours each year from 2002-2023. The website AllMusic was used to determine and code each headlining artist's genre classification. As noted in the limitations section, a potential issue with AllMusic's genre tagging is the combination of Pop and Rock into a single category, which can obscure distinctions between these two genres and blur the boundaries of many subgenres. This method provided a comprehensive overview of genre trends and their long-standing influence in the live music industry.

2023 Trends

Similarly to 2022, developing artists in 2023 saw significant increases in listenership before and during tours, but faced the largest drop-offs post-tour. In contrast, superstar artists showed minimal changes in streaming numbers, suggesting a plateau effect at higher levels of fame. Noteworthy in 2023 was the inclusion of mid-level artists, who displayed a modest pre-tour increase in listenership but a substantial post-tour surge of 28%, highlighting the potential long-term benefits of such exposure.

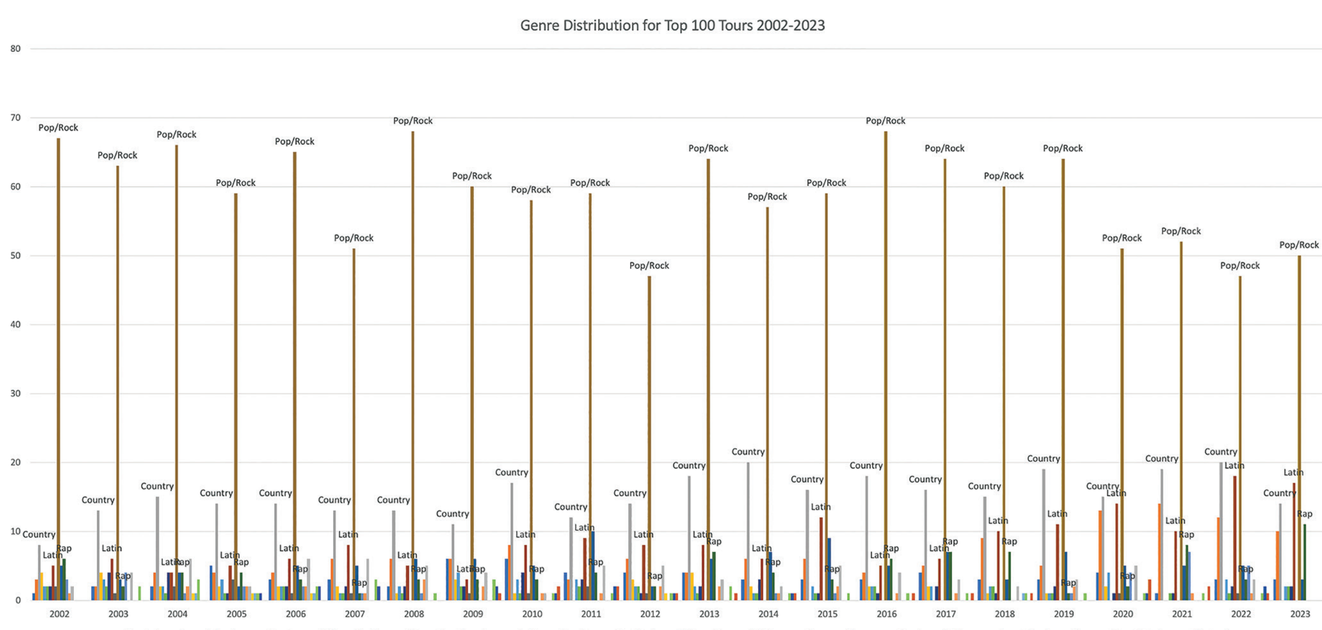

Figure 3. Genres for Top 100 Tours via Pollstar.

Genre Analysis

While pop, rock, country, and hip-hop continued to dominate in terms of increase, 2023 also marked a notable rise in the Latin genre, which demonstrated significant gains both before and after performances. These results collectively suggest that while the immediate benefits of opening for larger acts are more pronounced for developing artists, the sustained impact varies significantly across different levels of artist development and genres. We find that the smaller the artist, the more of a pronounced increase we see and subsequently, more of a pronounced drop-off. The higher up we move in artist size and ranking, we see less of an increase and subsequently less of a decrease. However, once we reach the top of the hierarchy of artist ranking, not only do we see an increase leading up to and during the tour, we also see an increase following the tour dates. The findings underscore the complexity of the "opening act" phenomenon and its differential impact on artist visibility and career progression.

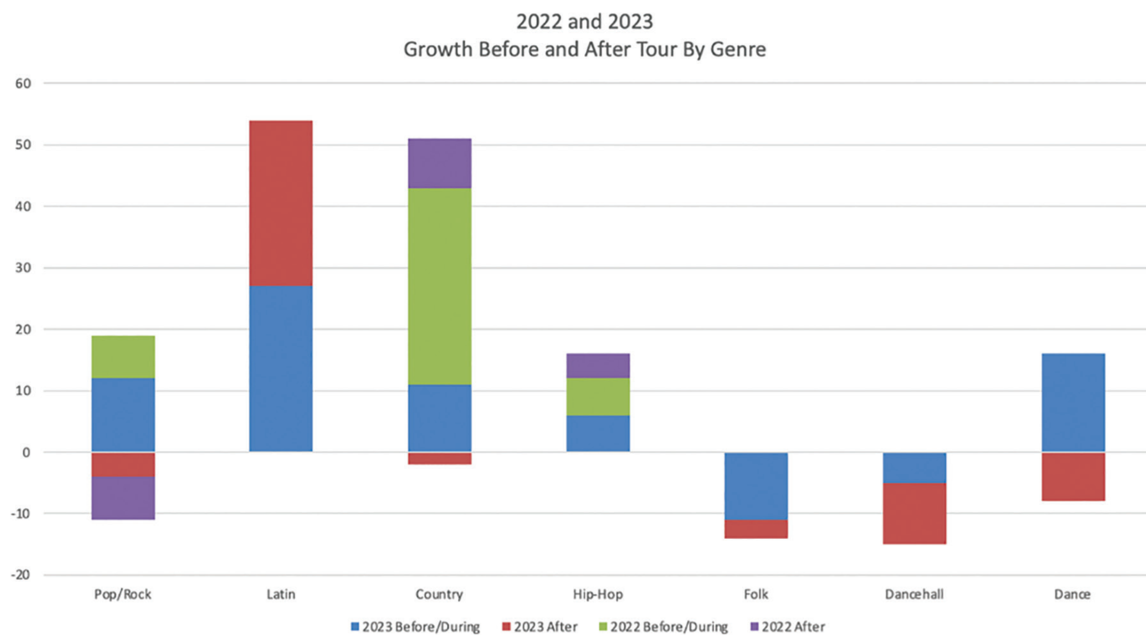

Figure 4. Streaming Change by Genre via Chartmetric.

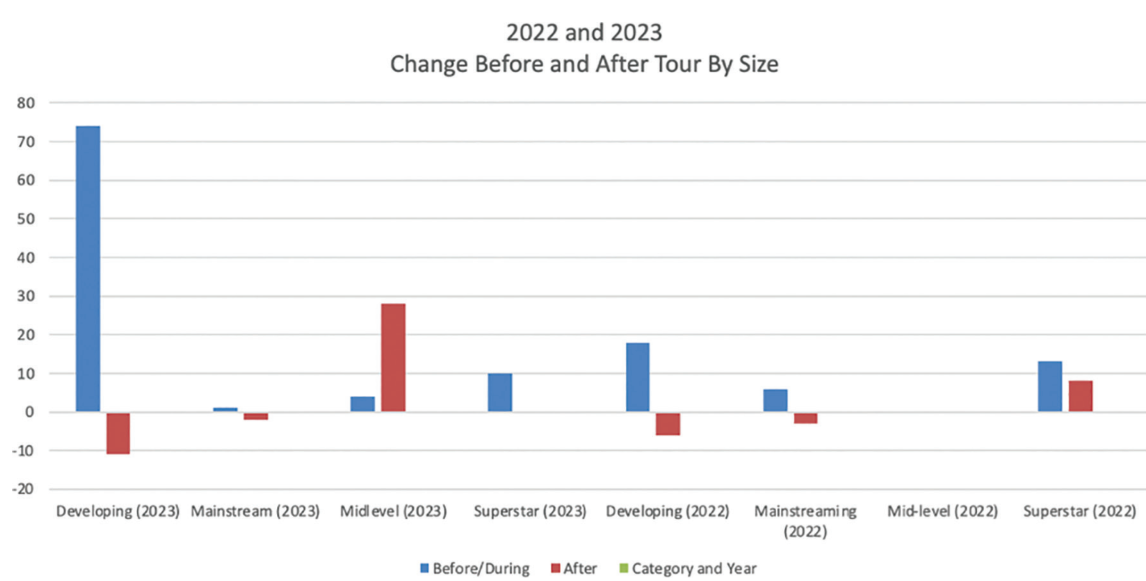

Figure 5. Streaming Change by Size via Chartmetric.

Micro-Level Analysis

The macro-level analysis revealed a clear trend: the impact of touring with a larger artist is disproportionately greater for smaller artists in terms of streaming numbers. These artists typically experience significant increases in streams during the tour, followed by a substantial decline once the tour concludes. Conversely, as artists grow in stature, the increase in streams associated with such tours becomes less pronounced; however, the subsequent drop-off in streams post-tour is also smaller, and in some cases, established artists continue to see an increase in streams after the tour has ended.

To explore these dynamics in more detail, I conducted a granular analysis of the opening acts for Taylor Swift's 2023 *Eras* Tour. The selection of this particular tour for in-depth analysis was informed by historical data, indicating that many of today's prominent pop stars, including Justin Bieber, Ed Sheeran, Shawn Mendes, and Florida Georgia Line, significantly advanced their careers by opening for Swift at earlier stages in their professional journeys. This historical context raises intriguing questions about the unique potential of certain headliners, such as Swift, to amplify the careers of lesser-known opening acts through their substantial fanbase support.

This further analysis helps determine whether a strong fanbase for a headlining artist like Taylor Swift can substantially elevate the profile of all associated opening acts, suggesting a distinctive dynamic where the fanbase's support extends beyond the primary artist to benefit supporting acts as well. This phenomenon is particularly pertinent in assessing the strategic benefits of tour partnerships in the music industry, especially for emerging artists seeking to expand their reach and influence.

The analysis of individual artists who opened for Swift underscored the variability of this effect. While Taylor Swift's music spans multiple genres, including pop, country, and folk, her sound has evolved to be primarily pop-oriented, with elements of singer-songwriter introspection. In contrast, some of her opening acts, such as Owenn (who was one of her former backup dancers), come from a more R&B and dance-focused background, which could lead to stylistic dissonance for Swift's predominantly pop audience. This difference might partly explain the dramatic 75% decline in streaming that Owenn experienced post-tour, despite an initial 188% increase during the tour. His musical style might not have fully resonated with Swift's core fanbase, illustrating the precarious nature of gains derived from such high-profile exposure. Similarly, Gracie Abrams, whose style aligns more closely with indie pop and introspective ballads, experienced a more moderate streaming trajectory, with a small decline at the onset of the tour followed by a sustained increase after its conclusion.

In the case of Paramore, another superstar act, the results were minimal, with a 1% decrease during the tour and no change thereafter. This scenario suggests that highly established artists may see little to no benefit from opening for artists of similar or greater fame and might even experience negative associations due to perceived mismatches in audience expectations.

Phoebe Bridgers, whose blend of indie rock, folk, and introspective lyricism shares thematic and stylistic commonalities with Swift's recent albums, such as *Folklore* and *Evermore,* saw a more positive reception from Swift's audience compared to other opening acts. Bridgers experienced a 6% increase in streams during the tour, followed by only a slight 5% drop-off afterward. This suggests that the alignment of musical styles and shared themes between Bridgers and Swift may have contributed to a stronger connection with Swift's fanbase, which emphasizes the role of genre compatibility in shaping the effectiveness of tour pairings.

Additionally, Bridgers' sustained interest post-tour is likely linked to her concurrent activities with her band, boygenius, a

Artist	Genre	Ranking
Beabadoobee	Pop/Rock	Superstar
GAYLE	Pop/Rock	Superstar
girl in red	Pop/Rock	Superstar
Gracie Abrams	Pop/Rock	Mainstream
HAIM	Pop/Rock	Mainstream
MUNA	Pop/Rock	Mainstream
Owenn	Pop/Rock	Developing
Paramore	Pop/Rock	Superstar
Phoebe Bridgers	Pop/Rock	Superstar

Figure 6. Eras Tour Openers via Chartmetric.

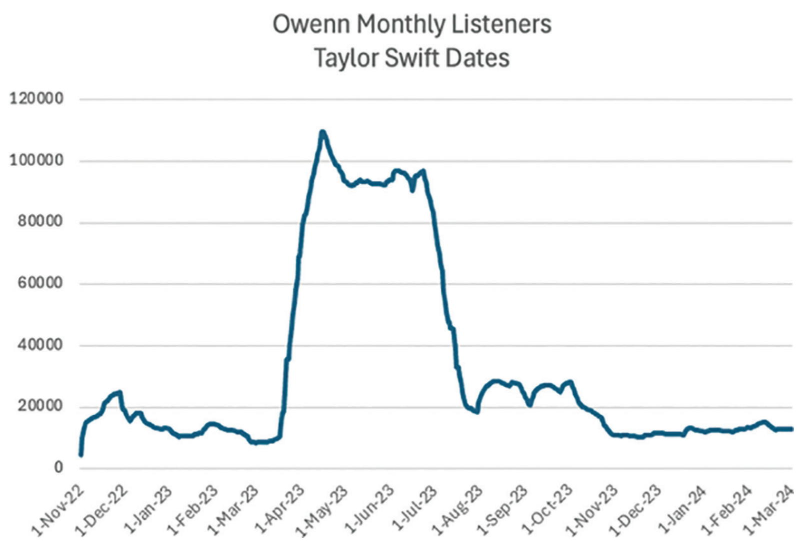

Figure 7. Change in Streaming for Owenn via Chartmetric.

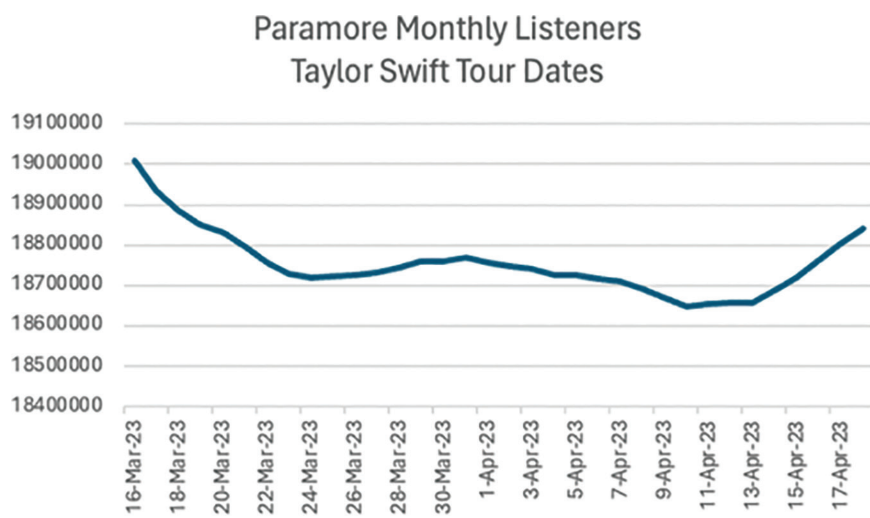

Figure 8. Change in Streaming for Paramore via Chartmetric.

supergroup also featuring Lucy Dacus and Julien Baker. This highlights how strategic tour pairings and parallel musical engagements can synergistically enhance an artist's profile, contrasting with acts like Paramore, whose established stature and stylistic differences from Swift did not yield significant streaming benefits.

While analyzing the genres of opening acts may provide some insight, it is essential to acknowledge that longstanding principles established during the era of promoters like Bill Graham continue to hold relevance. Historically, eclectic lineups were the standard, and pairing decisions have not been strictly genre-dependent. In his book *Bill Graham Presents: My Life Inside Rock and Out*, Graham emphasized the value of diverse lineups that transcended musical genres. He was known for curating concerts where artists from vastly different musical backgrounds performed together, believing that what mattered most was the audience's relationship with the headlining act. Graham's audiences were often motivated by their trust in his ability to create unique and memorable experiences, rather than by any particular genre alignment between the acts (Graham and Greenfield 1992).

This eclecticism reflected Graham's philosophy that the success of an opener was largely due to the loyalty and cultural connection the headliner had fostered with their audience. As a result, even if two acts seemed mismatched stylistically, Graham's audiences were open to a variety of musical experiences, supported by their trust in the headliner's choices. This suggests that balanced or genre-similar lineups

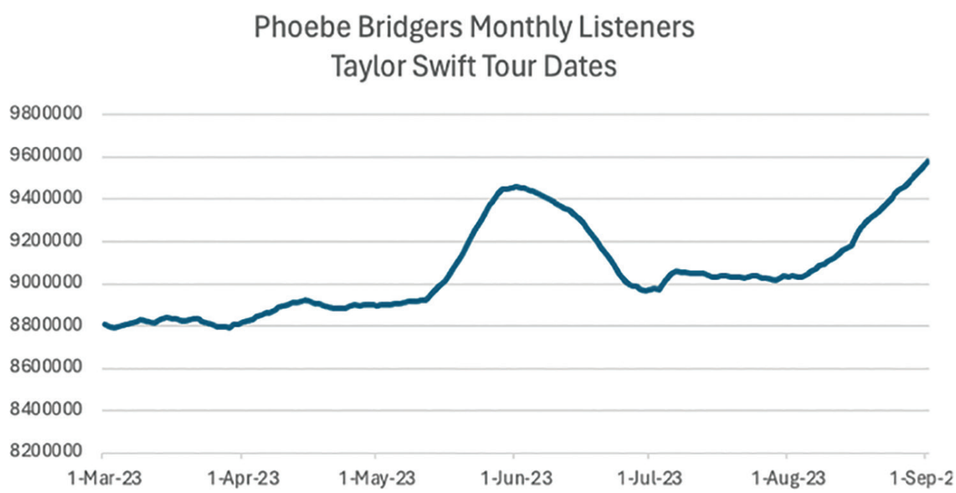

Figure 9. Change In Streaming for Phoebe Bridgers via Chartmetric.

between headliners and openers are not a prerequisite for audience engagement. Instead, the fanbase's enthusiasm for the headliner enables the acceptance of a diverse range of opening acts, regardless of their genre.

Moreover, the study noted the significant role of genre and external activities. For example, MUNA, another mainstream artist with a blend of synth-pop and indie, not only benefited from opening for Swift but also maintained interest. They were likely buoyed by their subsequent appearances with boygenius and new music releases. This indicates that an artist's activities outside the tour — such as participating in other high-profile tours and releasing new tracks — play crucial roles in sustaining and enhancing the initial boost received from tour exposure. These findings challenge the simplistic assumption that exposure through association with leading artists is uniformly beneficial. Instead, they reveal a complex interplay of factors — such as genre compatibility, external activities, and audience alignment — that contribute to an artist's streaming trajectory post-tour, highlighting the multifaceted nature of career development in the music industry.

A synthesis of the findings from the analysis of artists who open for more established acts reveals that the immediate benefits for opening artists are significantly more pronounced than the long-term advantages. While audiences frequently explore the music of opening acts during the tour, this initial interest seldom translates into sustained fandom. The data indicate that smaller artists experience substantial spikes in attention during the tours; however, these spikes are often followed by notable declines. Conversely, more established artists typically exhibit smaller surges in interest, accompanied by less pronounced drops, if there are any. This underscores a stability in audience engagement as one ascends the artist ranking scale. Additionally, the analysis reveals that certain genres, specifically pop/rock, country, and Latin, tend to see larger increases in audience engagement associated with these tours. This genre-specific variation points to differential impacts that may be influenced by audience preferences and the musical styles' mainstream appeal.

Building on these insights, the consumer survey results were analyzed to address a key secondary research question: are consumers more likely to explore new artists if they are endorsed by an artist they already support? This line of inquiry aims to understand how the endorsement of a well-known artist influences audience willingness to engage with lesser-known opening acts, thereby highlighting the potential for strategic partnerships in the music industry to foster new artist discovery.

Consumer Listening and Support of Openers

The following analysis is based on data from a consumer-focused survey administered through Music Connect, with a total of 525 participants (N = 525). The sample consisted of 272 males (51.8%), 246 females (46.9%), 5 non-binary individuals (1.0%), and 2 participants who preferred not to disclose their gender (0.4%). In terms of age distribution, 240 respondents (45.7%) were between the ages of 18-34, 234 respondents (44.6%) were between the ages of 35-54, and 51 respondents (9.7%) were aged 55 or older. The survey aimed to gather insights into concert attendance habits, engagement with opening acts, and overall listening behaviors.

Preliminary analysis of the consumer profiles provides valuable insights into concert-going behaviors and preferences. The data reveal that a substantial majority (89%) of respondents attended at least one concert annually, and a significant portion (74%) spend at least $50 or more on concert tickets annually. The predominant musical preferences among respondents are pop, rock, and country, with 90% of respondents indicating they listen to at least one of these genres.

A notable finding from the survey is that while 81% of respondents reported being somewhat or extremely likely to arrive early enough to view opening acts, only 39% consider the identity of the openers when purchasing tickets. Moreover, 68% of respondents acknowledged that they have discovered new bands through their exposure to opening acts at concerts. This suggests that although the initial motivation to purchase concert tickets may not be influenced significantly by the presence of opening acts, the concert experience itself serves as a valuable platform for audience exposure to new artists.

Furthermore, the data indicate that half of the respondents had subsequently purchased tickets to see an opening act perform as a headliner when they next appeared in town. This progression from initial exposure at a concert to actively seeking out subsequent performances by the opening act underscores the potential long-term benefits for emerging artists in securing opening slots at larger concerts. These findings illuminate the complex dynamics of concert attendance and the discovery of new music, highlighting that while consumers may not prioritize opening acts when making ticket purchases, the live concert experience significantly influences their subsequent music choices and spending behaviors.

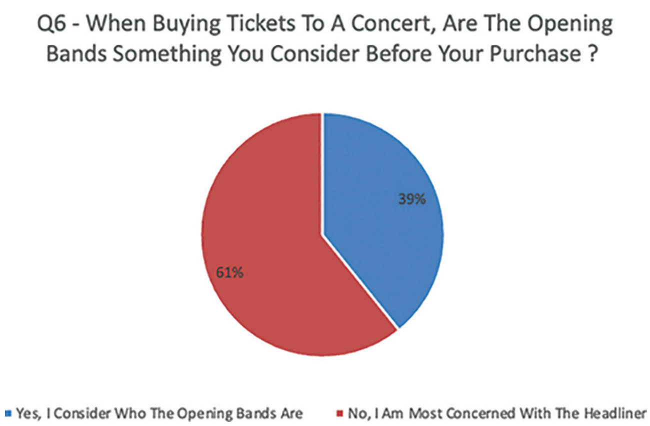

Figure 10. Percentage of Purchasers Who Consider the Openers.

Further exploration of the second research question revealed that 69% of survey respondents are likely to explore new music if it is endorsed by an artist they favor. Additionally, 73% of participants indicated that after purchasing a concert ticket, they actively seek more information about the opening acts, and 67% reported that they stream the music of the opening acts. These findings suggest that while associating with well-established artists or artists with a dedicated fan community might not guarantee long-term career success, it does appear to facilitate immediate increases in consumption. This is evidenced by the initial spike in streaming following concerts and corroborated by consumer behaviors indicating a predisposition to engage with new music endorsed by favored artists.

Regarding artist perceptions, an analytical approach was adopted to examine both the streaming statistics on Spotify and the firsthand experiences of artists. A survey of 47 artists of varying stature, deployed using the snowball sampling

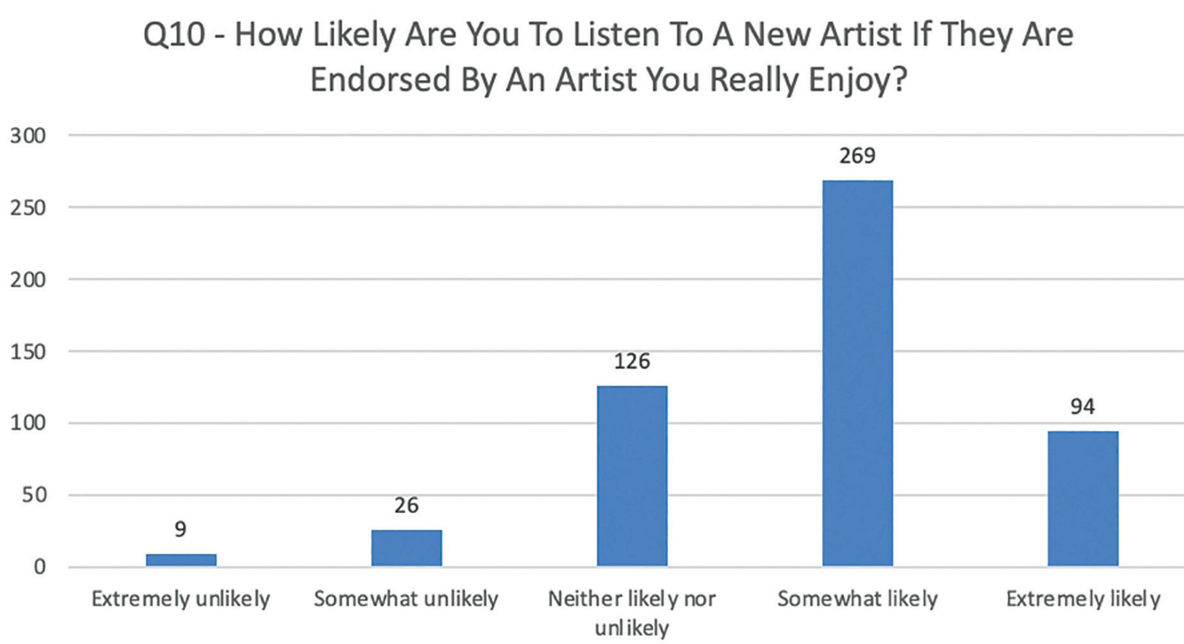

Figure 11. Percentage of Consumers Who Consider Endorsement.

method, revealed that 81% had experience opening for larger acts. Of these, 63% observed a noticeable increase in social media activity and followers, while 20% were uncertain if there had been any real impact.

A particular focus of the survey was to understand how artists were selected for opening slots. This aspect of the research, which will be discussed more comprehensively in the Implications section, revealed that selection criteria for opening acts vary widely. A majority of respondents indicated that personal connections, such as friendships with the band, were often crucial, with 29% attributing their selection to a booking agent and 21% to recommendations by concert promoters. Fewer than 10% mentioned management recommendations, and notably, none of the respondents were selected through contests, paying to play, or buying onto the tour — methods that, while not represented in this sample, are still prevalent in the industry.

Additionally, the survey explored the financial implications of these opportunities. Nearly 40% of the artists reported a financial loss from taking the opportunity to open for larger acts, while about 10% were uncertain of any financial impact. Conversely, approximately 50% reported no financial loss. These findings illustrate that while the opportunity to open for larger acts presents significant exposure, it often comes at a financial cost, and the criteria for selection can vary significantly, highlighting the complex dynamics within the industry.

Limitations and Future Research

In addressing the limitations and directions for future research, it is essential to acknowledge the diverse mechanisms through which bands are selected as opening acts. Selection processes vary widely; they can be based on personal connections such as friendships within the industry, shared business relationships like booking agents or concert promoters, or commercial strategies, including purchasing tour slots. Such diversity complicates the identification of clear patterns in how opening acts are chosen and their subsequent impact on career trajectories. Moreover, the analysis of streaming accounts and monthly listeners in relation to tours revealed multiple extraneous factors that could influence these metrics. These include viral social media activities, performances at high-profile festivals, new music releases, features in notable publications, and concurrent openings for other high-profile artists. These variables underscore the complexity of attributing changes in an artist's popularity solely to their role as an opening act.

The methodological challenges of this study were also notable. While data on top tours were readily accessible, gathering comprehensive details about all opening acts for these tours proved to be a labor-intensive and sometimes difficult task. Not all major artists utilize opening acts, and among those that do, many are not newcomers but rather established entities within the industry. Furthermore, a notable limitation of this study is the genre categorization provided by AllMusic. The site combines Pop and Rock into a single tag, which limits the ability to differentiate between these distinct musical styles. This overlap may obscure meaningful genre-specific trends in streaming patterns and audience engagement. Additionally, the reliance on self-reported survey data introduces the possibility of response bias, where participants' responses may not accurately reflect their concert-going habits or engagement with opening acts.

Looking ahead, future research could focus more specifically on artists who are truly at the nascent stages of their careers to determine the impacts of such high-profile exposures more clearly. A longitudinal study tracking these artists could provide insights into the long-term effects of opening for major tours. Additionally, adopting a qualitative approach could enrich the understanding of this dynamic. Interviews with artists, managers, concert promoters, and booking agents would offer deeper insights into the subjective experiences and strategic decisions behind these touring partnerships.

Further, a systematic, annual analysis of the top 100 tours, as cataloged by sources like Pollstar, could help in identifying recurring trends and shifts in the impact on opening acts over time. This approach would allow for a broader understanding of the evolving landscape of live music performances and the strategic implications for emerging artists within the industry. Future research would also benefit from more granular genre classifications, as the current study's use of combined Pop/Rock categories may have obscured meaningful distinctions between subgenres. Additionally, a larger, more diverse sample would help mitigate limitations in representativeness and ensure broader applicability of the findings.

Conclusion

This study elucidates that serving as an opening act, while beneficial, is not a transformative strategy capable of singularly dictating the trajectory of an artist's career. Although opening for larger tours provides emerging artists with the opportunity to perform before more extensive audiences and hone their stagecraft, it is but one of many factors influencing their developmental path.

The investigation reveals that artists occupying opening slots typically experience an immediate surge in streaming numbers. However, this increase does not reliably translate into long-term fan acquisition, as evidenced by the subsequent decline in streaming activity post-tour. This observation supports the premise that increased streams do not necessarily equate to a solidified fan base. The subjective criteria used to select opening acts, coupled with the minimal financial compensation associated with such opportunities, introduce significant variables and potential opportunity costs for artists.

This analysis also addresses the phenomenon of the "Taylor Swift effect," where artists with strong fan communities significantly bolster the profiles of their opening acts. Fans of a headlining artist are more inclined to explore and support endorsed opening acts, as demonstrated in the consumer survey data. A notable percentage of respondents indicated that they would listen to and even attend concerts of opening acts if these were recommended by artists they already support. Nevertheless, the magnitude of this effect varies; larger artists tend to influence streaming numbers less dramatically, and inappropriate artist pairings can lead to negative outcomes. Such mismatches may result in market oversaturation and a lack of resonance with the fan bases of the established artists, highlighting the critical importance of strategic alignment in tour planning.

Overall, while the role of opening acts in career development is undeniable, it must be viewed as part of a broader strategic framework aimed at cultivating and sustaining an artist's presence in the competitive landscape of the music industry.

Endnotes

[1]Pollstar is a leading resource for live music industry data, tracking concert tours, ticket sales, and live performance revenues globally. Available at: https://www.pollstar.com. Songkick is a concert discovery platform that allows users to track upcoming concerts, live shows, and artist tours in their area, providing notifications and ticket purchase options. Available at: https://www.songkick.com. Chartmetric is a music data analytics platform that tracks artist performance across streaming platforms and social media, providing insights on listenership, audience demographics, and chart performance. Available at: https://chartmetric.com.

[2]AllMusic is a comprehensive music database that provides information on genres, artists, albums, and songs. It is commonly used for genre classification and artist discographies. Available at: https://www.allmusic.com.

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