

CONCERT TOUR ANALYSIS · OCTOBER 2026

Zach Bryan's With Heaven On Tour: Where does it stack up?

After setting the attendance record at Gillette Stadium, how does the tour compare on resale demand, streaming, and retail impact?

KEY TAKEAWAYS

Softer ticket demand, but a real retail moment

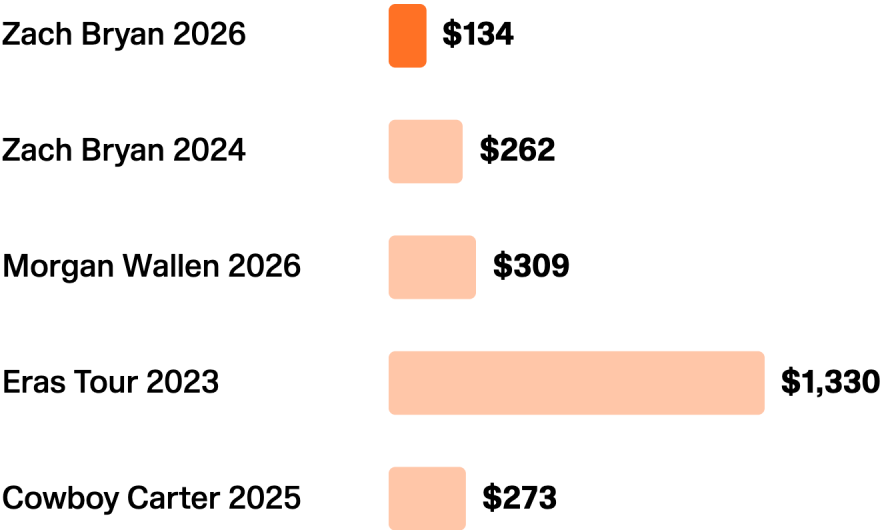
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| 01 | Ticket demand has softened | Resale tickets averaged \$134, half of the 2024 tour's \$262 and the lowest of any comparable tour, with fewer resale tickets per show. |
| 02 | Lowest price at every shared stadium | At all five stadiums shared with comparable tours, the 2026 tour posted the lowest average resale price, 22% to 48% below Zach Bryan's 2024 dates. |
| 03 | The tour did little for streaming | Monthly listeners rose 0.9% in the first eight weeks, behind Cowboy Carter (+3.2%) and the Eras Tour (+4.9%). |
| 04 | Boot Barn spend jumps before shows | In concert markets, Boot Barn spend grew 55% Y/Y in the 48 hours before a show vs. 10% nationally, on par with Morgan Wallen and Cowboy Carter. The non-country Eras Tour and Zach Bryan's 2024 tour showed no lift. |
| 05 | Millennials and baby boomers drive the retail lift | Millennial (+58 pp) and baby boomer (+73 pp) shoppers led the pre-show Boot Barn lift, while spending by Gen-Z did not rise. |

SECONDARY TICKET DEMAND

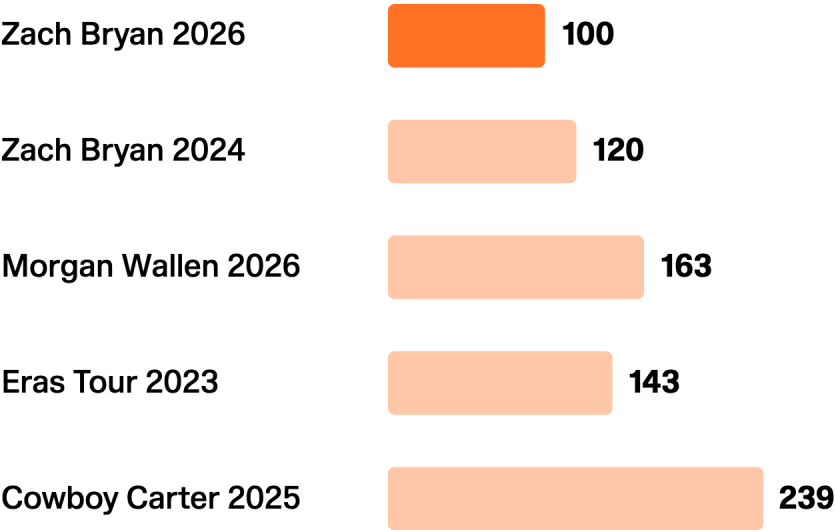
Resale demand trails every comparable tour

The 2026 shows averaged \$134 on the secondary market, about half of Zach Bryan’s 2024 level, and moved fewer resale tickets per show than any comp. No tour comes close to the Eras Tour’s pricing, but Cowboy Carter and Morgan Wallen had more tickets changing hands.

Average resale price per ticket

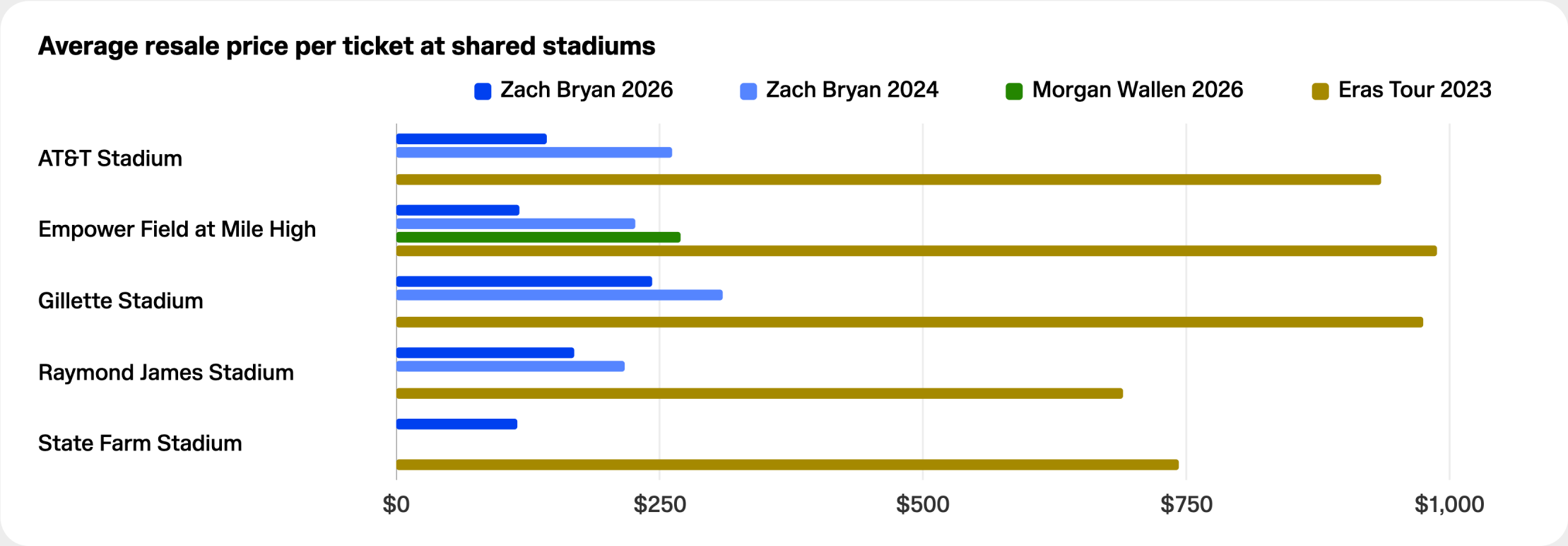


Resale tickets per show (index, Zach Bryan 2026 = 100)



Lowest resale price at every shared stadium

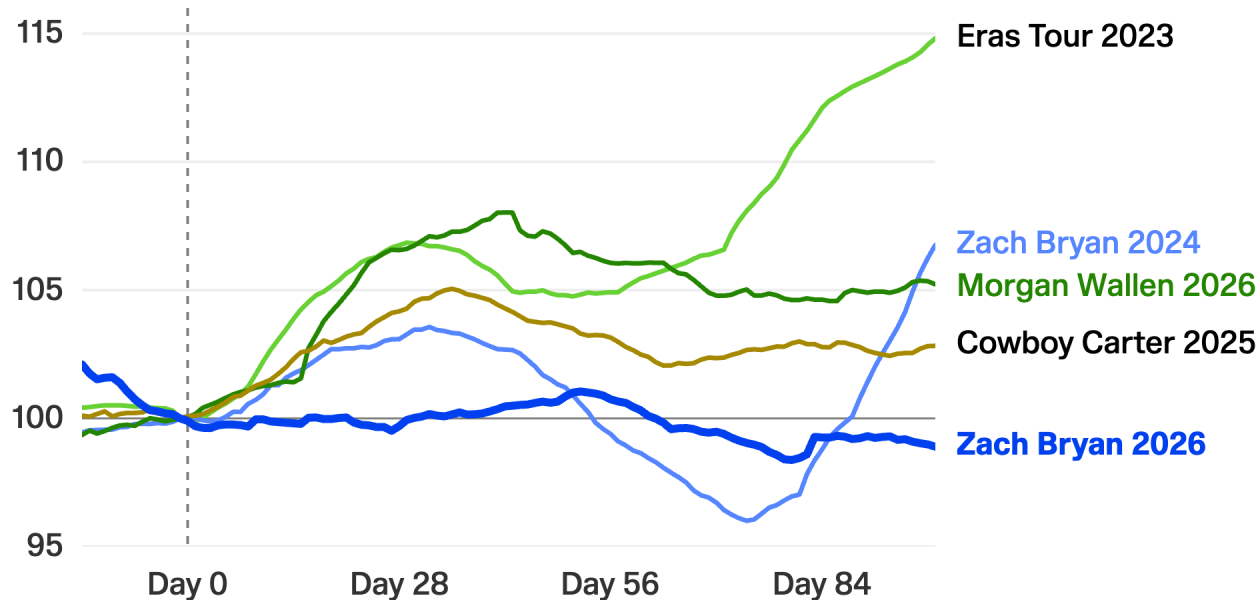
At all five stadiums the 2026 tour shared with comparable tours, it posted the lowest average secondary price, 22% to 48% below Zach Bryan’s own 2024 dates at the same venue.



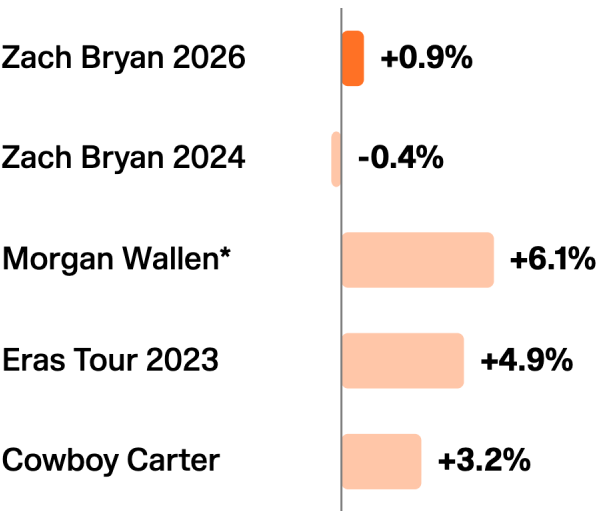
Streaming barely moved after the tour launched

Zach Bryan gained 0.9% in monthly listeners eight weeks in, better than his 2024 tour but behind every other comp. Morgan Wallen’s lift includes the release of “I Can’t Love You Anymore” with Ella Langley two weeks after his first show; listeners were up 1.6% the day prior.

Spotify monthly listeners, indexed to the day before tour start (= 100)



Listener lift at week 8

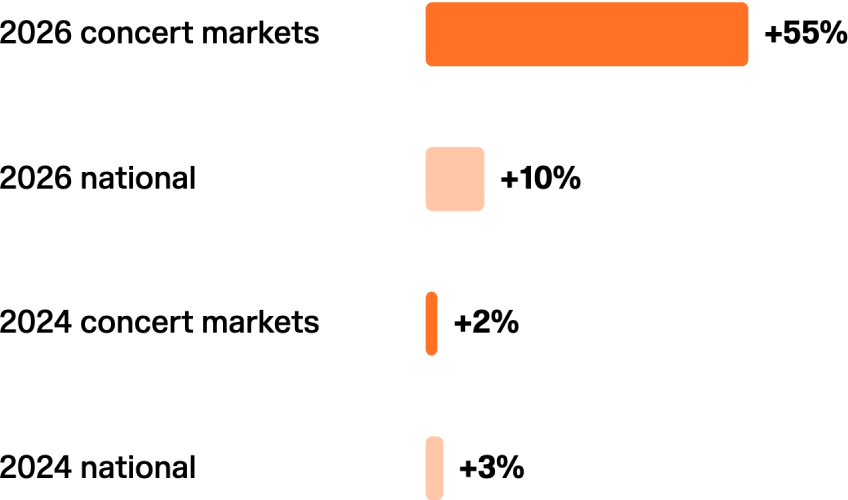


*Mid-tour single; +1.6% before

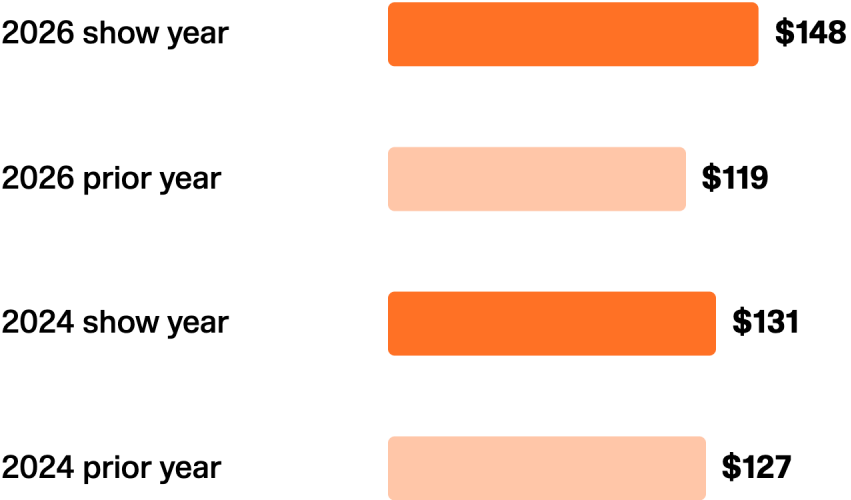
Concerts activate local Boot Barn spend before shows

In the 48 hours before each 2026 show, Boot Barn spend in the concert market grew 55% Y/Y vs. 10% nationally, a 45-point lift. The 2024 tour showed none. Average ticket rose 25% to \$148, more than the average secondary ticket price.

Boot Barn spend growth Y/Y, 48 hours before shows

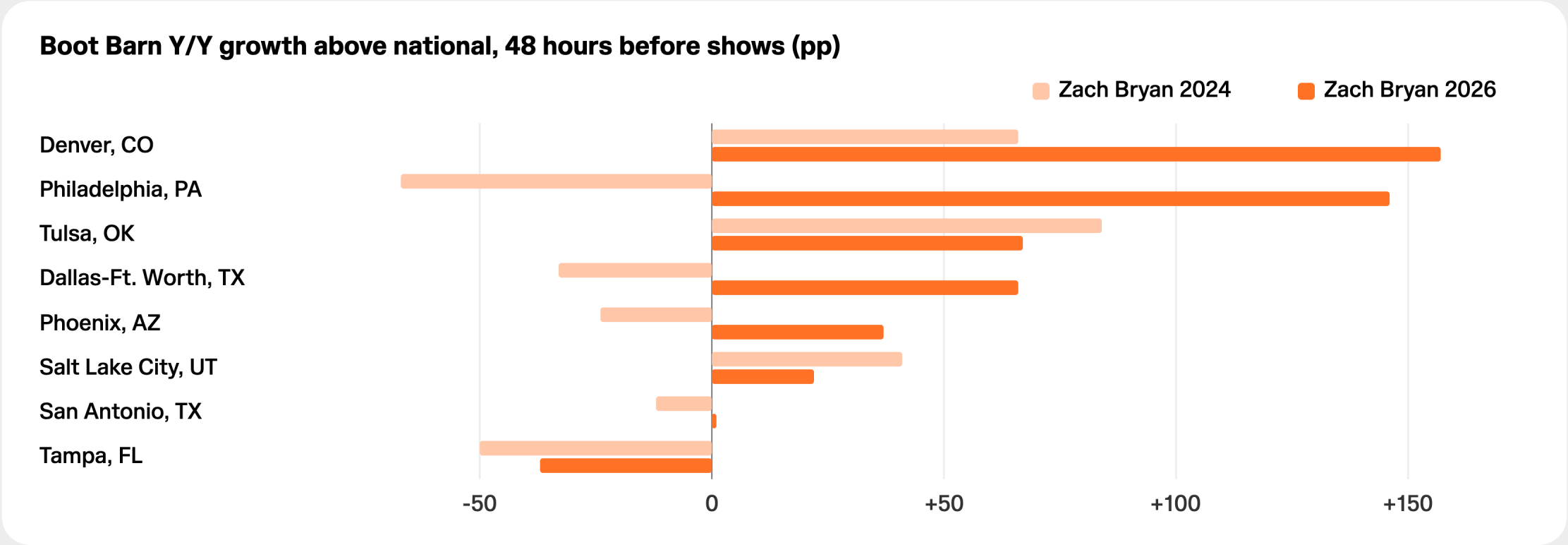


Boot Barn average ticket, 48 hours before shows



Most shared markets lifted more in 2026

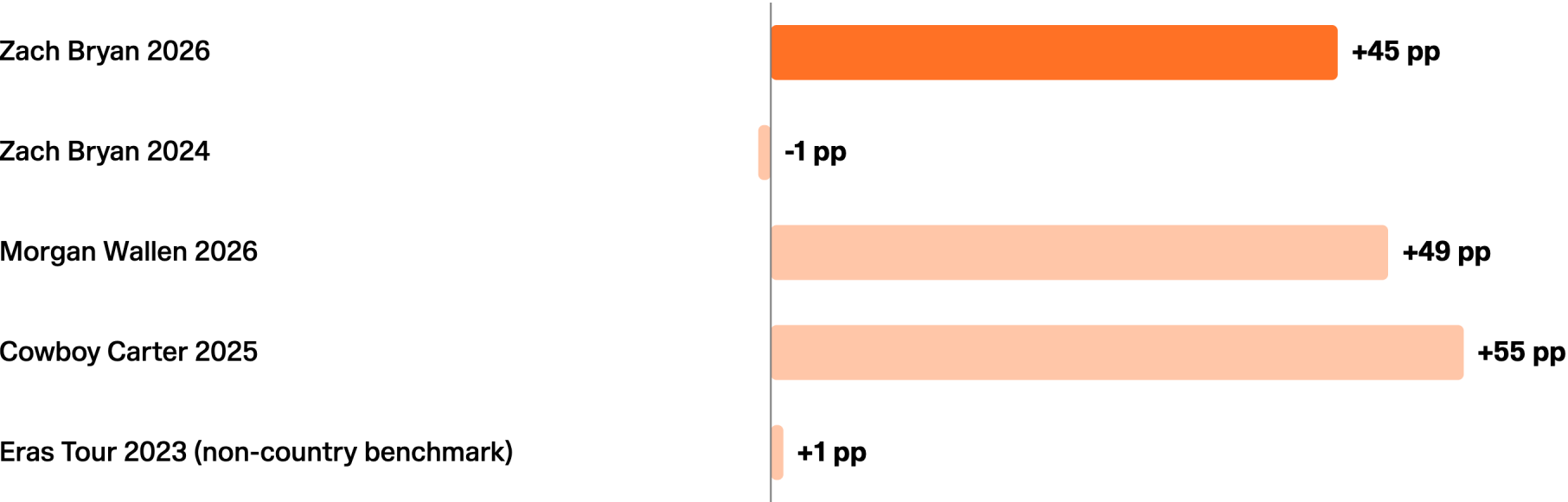
In 6 of the 8 markets both tours played, the 2026 lift beat 2024. Denver and Philadelphia led in 2026, and Tulsa was strong both years.



The lift matches other country tours

Zach Bryan’s 2026 tour lifted Boot Barn spend to a similar level (+45 pp) as Morgan Wallen’s 2026 tour (+49 pp) and Cowboy Carter (+55 pp). The Eras Tour, a non-country benchmark, shows no lift, nor did Bryan’s 2024 tour.

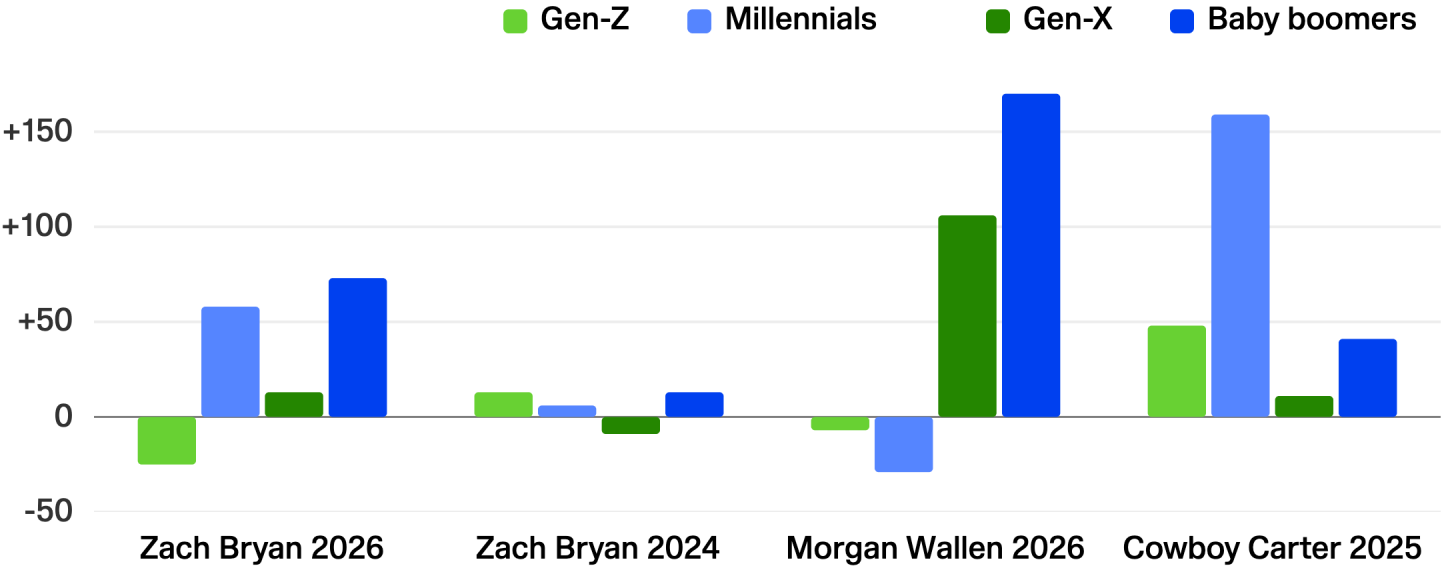
Boot Barn Y/Y growth above national, 48 hours before shows (pp)



Millennials and baby boomers drove Zach Bryan’s lift

Boot Barn’s audience leans older and Zach Bryan’s audience drove further growth among that cohort ahead of shows. Gen-Z was only meaningfully activated by Cowboy Carter; Morgan Wallen’s activations leaned older than Zach Bryan’s.

Boot Barn growth above same-generation national rate (pp)



Boot Barn’s base

Share of 2026 panel spend

40% Gen-X

30% Millennials

24% Baby boomers

6% Gen-Z

Gen-X and baby boomers make up 64% of spend

Zach Bryan’s audience under-indexes with Millennials

Zach Bryan’s audience under-indexes with Millennials, while Morgan Wallen’s audience leans Gen-X and Beyoncé’s skews younger, mostly in line with their Boot Barn activations. Despite the lower index, Millennials make up a larger share of Zach Bryan’s audience than of Morgan Wallen’s and appear to be more highly activated by concert tours.

