

Never Staying Silent: Live Music in the Midst of a Pandemic

Haley J Coleman

Berklee College of Music

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Abstract

The COVID-19 pandemic brought the multi-billion dollar live music industry to a screeching halt in March of 2020 by plaguing it with globally extensive safety, refund, insurance, policy, and procedural issues (IBISWorld, 2020; Pollstar, 2020; PricewaterhouseCoopers, 2020). Now more than a year later, there still has not been a conclusive end to the global pandemic despite promising progressions such as COVID-19 testing, treatments, and vaccinations (World Health Organization, 2021). Nonetheless, responses to the pandemic have varied drastically due to differences in population size, density, and accessibility (Centers for Disease Control and Prevention, 2020; World Health Organization, 2021). Over a year later at the time of this research project, the WHO has recorded more than one hundred and twenty five (125) million confirmed cases resulting in over three (3) million deaths throughout the course of this pandemic.

For live music in particular, this has put lives and livelihoods at major risks given disjointed responses and debilitating costs. Direct professional insights will be analyzed in tandem with industry reports, studies, interviews, and articles to fully illustrate the current moment, its challenges, as well as opportunities. In these conclusions, the industry built on camaraderie and creativity needs to change its tune to encourage hope and collective action. As an industry not known for its silence, live music has been left to wonder- how will the show go on?

Research Questions

Referred to as an ‘Experience Economy’, the world had previously been enjoying constant growth in the live entertainment and experience market before COVID-19 (Lefsetz, 2020). With the inability to mass gather however, live music revenues screeched to a halt in the midst of a pandemic and left the industry in a panic as to how it will remain viable. What is the value of live music and why is it important to protect? Can the industry support not only the arts but its creators too? How can these changes be seen through to bring back a robust, vibrant industry? Existing literature on the pandemic and its impacts on live music are constantly being updated, however the general consensus agrees that moving forward will take great amounts of collaboration, creativity, and innovation. To communicate and create with one another comes at a critical moment not only for this industry, but humans as a whole.

Literature Review

Setting the Stage: Live Music Prior to the Pandemic

Prior to COVID-19, the global music industry's total revenues were primarily composed of two major income streams: recorded and live music (Hall, 2020; Lavigne-Delville & Fraga, 2018; Statista, 2021). Described by live music professionals as a booming experiential market, the 2020 season was primed to continue through a decade of incredible growth (Lefsetz, 2020; Nielsen, 2019; Pollstar, 2020; Statista, 2021). Broadly defined the live event industry:

“Creates, manages, and promotes live performances, ranging from concerts and theater performances to state fairs and air shows. Some promoters lease space from stadium, arena, and theater owners while others own and operate venues.”¹

Live music performances accounted for the majority of revenues in comparison to its recording counterpart in the five years leading up to 2020. Projected live event revenues for 2020 were set at over 34 billion dollars, with a music industry valuation of greater than 50 billion dollars (Lavigne-Delville & Fraga, 2018; PricewaterhouseCoopers, 2018). COVID-19 however introduced the single largest contraction in live event history since the Great Depression, with revenue losses set to surpass 30 billion dollars in 2020 alone (IBISWorld, 2020; Pollstar, 2020; PricewaterhouseCoopers, 2020; Sound Diplomacy, 2020). Furthermore, leading voices in global music policy have estimated more than 150 billion dollars were lost in 2020 given the retractions

¹ Definition provided by IBISWorld for data collecting purposes.

of sales for goods and services across creative industries (Goldman Sachs' Global Investment Research, 2020; PricewaterhouseCoopers, 2020; Sound Diplomacy, 2020).

As a global resource, music has served as a universal language and entertainment which extends into consumers' identities, emotions, and well-being (Bartleet & Hesser, 2020; Lavigne-Delville & Fraga, 2018). In a biometric experiment and study produced by concert giant Live Nation, live music proved to be an incubator for "excitement, emotional intensity, attentiveness, engagement, and human connection" (Lavigne-Delville & Fraga, 2018). From this 2018 study, conversations with over 20,000 fans across 5 separate continents hit the same note: the live music experience uniquely fulfills a basic human need for connection, creativity, and engagement.

From fans to artists, industry executives, and everyone in-between, live music has been built on passion and the meaningful connections or moments made along the way. Large scale live events in particular have grown exponentially in size and popularity since the 1960s with the largest modern music festival (typically) bringing in over three million attendees annually (Donauinselfest, 2021). Live music revenues are primarily composed of ticket sales, along with merchandise; sponsorships; marketing and advertisements; food and beverages; plus ancillary incomes such as parking and upgrades. Moreover, given the associated consumer costs with attending events including transportation, lodging, and hospitality, the value of live music has never been higher. Succinctly concluded by leading music policy consulting firm Sound Diplomacy: "investing in music and culture is an investment for public health" now and into the future (Sound Diplomacy, 2020).

Currently well into 2021, the live music industry continues to face uncertainty as events reschedule, cancel, or indefinitely postpone (Live For Live Music, 2021; Sisario & Ryzik, 2021; Ticketmaster, 2021; Vulture, 2021). At live events, professionals of all levels help one another accomplish fantastic feats; from venue managers to booking agents, ticketing, security, production, merchandise, artists, and everyone in-between, significant resources go into ensuring shows are safe, efficient, and exciting. It should be noted that although the live music industry is highly diverse and expansive, US based entertainment conglomerates Live Nation Entertainment (Live Nation) and Anschutz Entertainment Group (AEG) remain formative titans in the international events market (Gensler, 2021). As the world battles this pandemic, majors and independents alike have been forced to adapt, pivot, or remain silent. Throughout these disruptions however, humans have banded together in finding answers to the developing COVID-19 crisis. Collective communication and action have proven instrumental in finding focus, engaging communities, and effectuating change. Ultimately everyone - both on and off stage - has been put on pause to hear what happens with 2021 and beyond.

Immediate Ramifications

The cacophonous shift for live music occurred once the international concert industry began to rapidly cancel and postpone events with artists due to the COVID-19 pandemic (Gensler, 2020; Pollstar, 2021; Ticketmaster, 2021). Led by the shuttering of festivals South By Southwest (SXSW) and Ultra mere days before 2020 iterations, the onslaught of event

postponements and cancellations which shortly followed en masse left music fans and professionals alike stunned (Pollstar, 2020; Sisario & Ryzik, 2021). The dominos quickly fell and by (Friday) the 13th of March, the live music industry enacted a precautionary global shutdown. Suddenly plans for mass gatherings morphed into mass confusion as everyone was abruptly thrust into uncharted pandemic territory, desperate for guidance and alternatives (Lefsetz, 2020; Pollstar, 2020). In a moment's notice previous schedules for shows, tours, and festivals around the globe were wiped clean from the year of 2020 due to the ascension of COVID-19 cases and casualties (Gensler, 2020; Ticketmaster, 2021; Vulture, 2021).

The imposed halt simultaneously swept the world and live music industry off its feet. Initial projections from the first quarter of 2020 reported the Top 100 tours grossing 10.9% more than the previous year, along with ticket prices and sales rising 10% and 4.6% respectively (Allen, 2020; Pollstar, 2020). According to box office data from Pollstar between November 2019 to November 2020, the Top 100 tour grosses shrank upwards of 78 percent; attendance rate dropped by over 60 percent; even average ticket prices were slashed in half (Allen, 2020; Pollstar, 2020). In totality, the accumulated grosses and number of tickets sold in 2020 was roughly less than one quarter of what the live music business produced the year prior (Allen, 2020; Pollstar, 2020). Cost saving measures were implemented shortly thereafter, moving forward with uncertainty as to when the industry would safely return.

Consequences on events from COVID-19 included widely established nonpharmaceutical interventions (NPI) such as lockdowns, crowd restrictions, and pandemic guidelines; hiring freezes; program or production losses; funding and budget cuts; salary and benefit reductions; massive furloughs; unfortunately often ending with business closures (Save Live Events Now,

2020; Save Our Stages, 2020; Sound Diplomacy, 2020). Pleas from industry wide assistance and relief sources reported upwards of 90 - 95% of events in 2020 as being impacted by cancellations and postponements (NIVA, 2020; Sound Diplomacy, 2020). In turn this has caused more than 97% of contract jobs to reportedly be eliminated in the market, while 77% of other live event employees and wage earners have lost *all* of their income (NIVA, 2020; Sound Diplomacy, 2020).² US unemployment similarly exhibited spikes during the pandemic, leading to decade highs as seen in Figure 1. The continued ripple effects endured from COVID-19's shockwave have proven equally catastrophic and pervasive across the globe.



Note: Shaded area represents recession, as determined by the National Bureau of Economic Research.

Source: U.S. Bureau of Labor Statistics.

² Please note the QR codes within infographics below for COVID-19 relief sources/efforts to support struggling musicians and live music professionals: NIVA, Crew Nation, and Sound Diplomacy.

Figure 1. Rates of unemployment within the United States as of May 2021. Reprinted from US Bureau of Labor Statistics Unemployment. 2021,

<https://www.bls.gov/charts/employment-situation/civilian-unemployment-rate.html>

Copyright [2021] by US Bureau of Labor Statistics.

Opportunities to Innovate

In times of crisis such as these, humans often look to one another for support and direction. The sacrifice, ingenuity, and determination exhibited by everyone throughout this time has been defining in the progress made forward. This global emergency has demonstrated the necessity to effectively pivot, subsequently encouraging newfound strengths in creating, collaborating, and innovating (Blistein, 2020; NIVA, 2020). Despite these monumental challenges, the current moment has also presented several opportunities. During COVID-19, the demand for live music has continued to be heard through the technological adaptations and innovations of live streaming, gaming, and event shape shifting in addition to augmented and virtual realities.³

When devising alternatives to live events while simultaneously abiding by COVID-19 protocols, some entities took cues from the past. For drive-ins specifically, this presented many with a short term solution for filling the gap year of 2020 to varying degrees of success given

³ Event shape shifting refers to the revisions made in direct response to COVID-19 whether it be in format, capacity, or procedural differences.

logistical, financial, and experiential constraints (Gensler, 2020; Lefsetz, 2020; Melas, 2020).

During this, parking lots and large empty spaces quickly became prime real estate for pandemic conscious events with iterations spanning across genres, locations, and restrictions. Other event alternatives were found in the forms of individual platforms, drive thrus, and even space bubbles for instance (Melas, 2020; Woodyatt, 2020). Event organizers in the United Kingdom (UK) made headlines in August of 2020 by upping the ante and introducing raised platforms to host 2,500 attendees in separate pods (Melas, 2020). Electric Mile started off the new year (2021) with an “interactive audiovisual drive-thru festival” in California’s Santa Anita Park (KABC, 2021).

Meanwhile, The Flaming Lips introduced 100 individual inflatable “space bubbles” in Oklahoma complete with high frequency supplemental speakers, a water bottle, battery-operated fan, towel, and sign for break requirements in each (Savage, 2021).⁴ London based dance festival We Are FSTVL made use of an expansive airfield by limiting capacity and splitting the audience into groups of two, four, or six. Alternatively, Austria’s Donauinselfest mobilized its 2020 format and hit the road for an abbreviated tour made up of COVID compliant shows (Donauinselfest, 2021; Farmer, 2020). Complete with captured performances and monumental moments, *Coachella: 20 Years in the Desert* brought the festival home and saw the industry again connect with fans in a new format: #Couchella (Coachella, 2020). For some acts, forging a new path proved more fruitful than previous, more traditional methods. In August of 2020 artist The Weeknd teamed up with social media platform TikTok for “The Weeknd Experience”, which drew in over 2 million unique views and raised \$350,000 for the Equal Justice Initiative (Spangler, 2020). This specific collaboration featured the performing artist’s avatar in an immersive and interactive world that

⁴ Accommodation signs included verbiage “I gotta go pee” one on side, “hot in here” on the other (Savage, 2021)

brought international audiences into a customized “hallucinatory dream world” built on augmented, virtual, and mixed reality elements (Spangler, 2020).

Many artists have looked to the livestreaming as easy access to fans and content. According to Nielsen Total Audience Report, cost, variety, and user friendliness were consumers’ top priorities when selecting a streaming service or platform (Nielsen, 2020). Focusing on these needs have paid off for musical acts not only in terms of financial gain, but brand engagement, awareness, and long term relationship growth too (Nielsen, 2020). These technological innovations have successfully supported awards shows, music performances, sporting events, and games looking to virtually or digitally connect performers with audiences. Successfully enough in fact that live streaming has a projected compound annual growth rate (CAGR) of nearly 20% year over year from 2020 to 2027 (Grand View Research, 2020).

It is not solely the majors making moves however as independents have also exponentially stepped up to present modified events and establish new formats for live music. Representing the interests (and restrictions) of respective areas, independent promoters and artists remain instrumental in sustaining a bountiful music ecosystem with involved, passionate communities.⁵ Cumulatively the ingenuity and creativity demonstrated across live music has once again highlighted its ability to innovate and collaborate. Working together to effectuate change amplifies the ability to do so on a large scale now and well into the future.

⁵ Notable examples from Southeastern US promoters include Ear For Music, Charleston Music Hall, and Eagle Nest Management to name only a few.

Banding Together for Good & the Road Ahead

The music industry is no stranger to disruption and although widely prepared with various contingency plans, pandemics were an unexpected and direct hit for those looking to attend and work events. Put on pause, people involved with live events were quickly inundated with questions regarding event refunds, risks, artists' guarantees, and liabilities, in addition to insurance clauses and coverage (Gensler, 2020). Compound this with the rules changing from location to location and the equation instantly became chaotic and unmanageable. As agencies, venues, artists, and even fans crave live events and their alternatives, realistic expectations conclude that this COVID-19 timeline may potentially extend into the 2021/2022 seasons without proper navigation and facilitation (Vulture, 2021). Through these historical and often difficult times, live music has been kept alive by the tangential heartbeat of fans, artists, and creatives alike. Organizations such as National Independent Venue Association (NIVA); National Independent Talent Organization (NITO); Save Live Events Now; as well as Save Our Stages (SOS) Act have been several examples of the industry stepping up to the COVID-19 challenge head on with demands for direct relief aid and policy reform (NIVA, 2020; Sound Diplomacy, 2020). NIVA research specifically requests federal relief and reform as a call to action that live music could be lost without continued support of its local, independent sector. Large organizations such as Live Nation and Spotify have also contributed with efforts including Crew Nation and COVID-19 Music Relief respectively (Live Nation Entertainment, 2021; Spotify, 2020). Creatives of all calibers have acknowledged that together we are better, particularly when it brings solidarity and hope in a moment of darkness.

The billion dollar question on everyone's mind: when and how will live events safely return in full force? Projected rebound predictions are hopeful of a strong return once events are able to largely resume at full capacity (Goldman Sachs, 2020; Sound Diplomacy, 2020).

However, given the evolving circumstances surrounding the pandemic, predictions for when live music returns vastly differ. Whereas LN CEO Michael Rapino shared visions of rebounding in Summer or Fall of 2021, festival promoters in Germany and the United Kingdom have already deemed 2021 another enforced fallow year (Live Nation Entertainment, 2021; Smirke, 2021).

Regardless, immediate assistance is required along with long term support for music *and* its creators. Majors and independents alike will have to work together in effectuating massive, systemic change because further constricting and condensing business into the hands of few will impact *everyone* in the musical ecosystem. While the industry may have temporarily pressed pause and shape shifted, its absence also highlighted the value it has in our lives. Throughout the pandemic specifically, humans repeatedly sought the arts for comfort, connection, and creativity. At present there are numerous opportunities to positively transform the music industry for future generations. Policy reform impacting modern artists such as copyright royalties or safe harbor provisions have been proposed as starting points, along with standardizing blockchain and non-fungible tokens (NFT) technologies as developing instruments within music (Hall, 2020). Additional issues surrounding the industry include mental health and time management, where heavy show loaded schedules commonly led to breakdowns, burnouts, or worse (Hall, 2020). Redeveloping environments to center around music can also elicit a wide-range of positive responses, particularly as it hearkens back to human reliance on sound for safety, connection, and community (Jones, 2021). Investing the infrastructure and regulatory framework into these areas

supports longevity of the arts and artists. For creatives and consumers these disruptive times call for collective action and ingenuity. Ultimately, adapting to this moment will remain as a testament to the perseverance and resilience of human beings as well as live music.

Methodology

The mixed methods approach employed in this culminating experience is composed of both qualitative and quantitative data. By using abductive reasoning, this paper comprises current reports, surveys, and in-depth interviews to assess the evolving situation as it pertains to the live music industry. Reliance on these gray sources is instrumental because it enables insight to large companies with access to audience pools and resources that represent a sizable portion of the live event industry.⁶ Moreover, skill sets and expertise vary drastically between professionals, providing ample perspectives to the numerous parts required in live events. This diversity presents an opportunity to include insights from both major and independent sources.

Quantitative Methods

The quantitative portion of this study includes data analysis and visualization of the global live music industry's varied responses to COVID-19. Trusted industry sources such as Pollstar, Billboard, and Statista consistently share quantifiable datasets to illustrate trends and

⁶Gray literature refers to research from a primary source either unpublished or published in a non-commercially way such as financial filings, government reports, white papers, and press releases.

contextual references. The rapid progression of these circumstances are included in a timeline to further demonstrate the pace at which changes took place at the beginning of the pandemic.

Given the fragmented live music industry employment sourcing, unemployment figures from US Bureau of Labor Statistics (BLS) will instead further establish COVID-19's extensive effects on lives and livelihoods. Particularly when unable to mass gather, live music was forced to quickly get creative with alternatives. The popularity of live streaming for example has taken off dramatically over the course of the pandemic, with Pollstar now reporting viewership in lieu of traditional box office data such as ticket sales and revenues.

Qualitative Methods

The qualitative portion of this observational study includes in-depth, semi-structured interviews that capture personal and professional experiences as a result of COVID-19. For the protection and integrity of involved participants, the conducted interviews remain anonymous. These semi-structured discussions include focused points while simultaneously leaving room for participants to elaborate as seen fit. Respondents represent views from both major and independent live event entities. Due to COVID-19 restrictions, many of these interviews were conducted via phone or video call. From the researcher's past professional experiences with the included individuals, all have exhibited superior quality and care for live music time after time. The analysis of interview responses provides general themes regarding COVID's repercussions, along with evaluating the opportunities for live music to collaborate and innovate moving

forward. The included questions are as follows:

1. Initially heading into 2020, what was the upcoming season preparing to look like?
2. When did you first witness impacts on the industry directly due to the pandemic and how did it affect your area of expertise?
3. Can you describe some of the challenges live events specifically faced during this time?
4. Have you participated in any events modified for COVID-19 considerations and guidelines? What did these adaptations look like?
5. Where have you recognized the greatest opportunities for innovation in the music industry given the current circumstances?
6. With consequences felt far and wide, what lessons can be carried from this crisis?

Limitations

Without a definitive end to the global pandemic, there remains uncertainty as to what the future holds for live music. Undeterred by these monumental challenges however, the industry as a whole has remained adaptable and hopeful for a robust return. Circumstances surrounding COVID-19 have shifted nearly daily throughout this time, however as vaccinations continue to roll out there are positive movements being made towards live events' revival. With these limitations it is important to remember that projections reflect ongoing circumstances and are likely to change as time passes. Nevertheless, examinations into available resources and perspectives afford this research direct insights to this pandemic's immense threats (and opportunities) present within the live music industry.

Results

Data

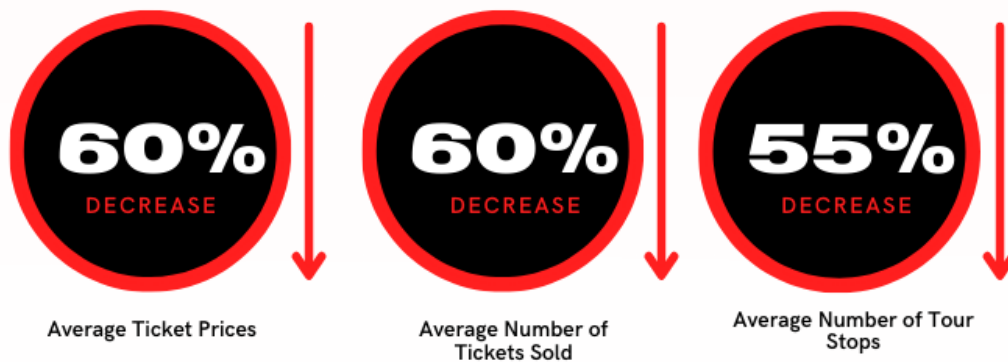
Billboard, Nielsen Music, and Pollstar are sources from which music professionals often rely upon for industry insights. Without the ability to mass gather in a pandemic, many repeatedly returned to music for comfort across multiple genres and mediums. Previously following an upward trend in live music revenues, foundational shifts for top music tours were witnessed between 2019, 2020, and 2021. Pollstar simultaneously witnessed a clear drop off for

live events, notably forgoing box office data in lieu of live stream music viewership from May 2020 until April 2021. Once resuming the publication of box office data in May 2021, Pollstar shared negative projections in regards to ticket sales, pricing, and frequency. Also marked as a historically defining moment in time, Billboard, Nielsen Music, and MRC Data collaborated to release a US 2020 Year-End Report concluding demonstrative growth in virtual concert attendance and interest. It reports that on-demand audio streams significantly outpaced other recorded music formats such as digital downloads or physical albums, with particular attention on music live streams. Additionally during this same time BLS reported US unemployment rates peaking at 14.8% between March and April of 2020, hitting the creative sector especially hard. Moreover, the exorbitant progression of these circumstances rapidly crippled individuals and the industry, leaving some to never fully recover. These results were collected and synthesized through excel to determine notable anomalies or trends. Research findings indicate that live music industry professionals experienced extensive personal and professional losses through this time. In contrast, there also remain moments of opportunity and strength as circumstances surrounding COVID-19 progress towards a conclusion. Figure 2 illustrates these impacts on the industry at large. Industry sources including interviewees all indicated March 2020 as when the sudden shift occurred. Additionally captured in Figure 3, data indicates quick, steep losses over the timeline of a week in March.

COVID-19 IMPACTS ON LIVE MUSIC

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The Top Live Events box office data is recorded and shared by Pollstar. These findings rank based off the average gross per city for an artist. In this research, the Top 5 were chosen in May of 2019, 2020, and 2021.



There was a brief period between 2020 and 2021 from which Pollstar pivoted to focus from Box Office to Live Stream data. Respondents in the survey were of split opinions as to the longevity of live streaming shows, however it has proven to effectively garner attention from an exponentially larger venue- the world stage.



The largest modern music festival annually welcomes over 3 million attendees, whereas 11 million fans joined for the highest viewed livestream in 2020. With livestreaming, artists and venues now have the opportunity to gain a crowd from around the world.



US unemployment significantly increased +300% during COVID-19 with rates having yet to return to pre-pandemic levels.

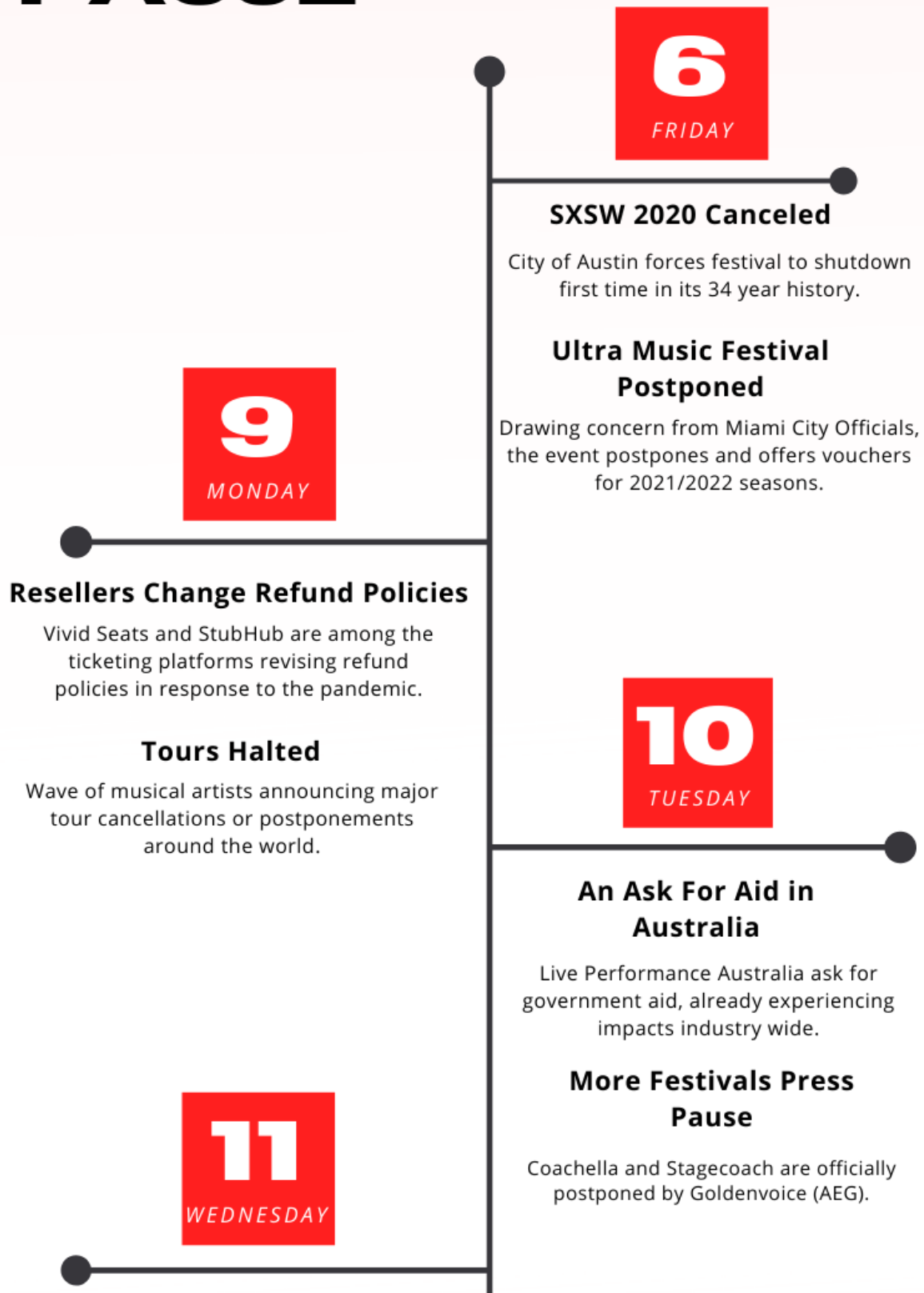


More than 90% of live event workers reported lost income or wages without the ability to maintain unmodified in-person mass gatherings.

Figure 2. Comparison of live music festivals contingency plans for 2020 and beyond.

Infographic created by author with information pulled directly from festival sources.

TIMELINE: LIVE MUSIC PRESSES PAUSE



Mass Gatherings Banned

States begin banning mass gatherings, meanwhile Washington DC declares a State of Emergency.

Travel Suspended

Travel is suspended between US and Europe by 45th US President.



Worldwide Pause

Cancellations and postponements continue for live events worldwide.

Money Woes

Tidal wave of layoffs, closures, and cost-saving measures begin across the industry.



Announcement From the Majors

Major U.S. promoters and agencies announce task force, recommending suspension of all live events.

Independent Venues Unite

Independent venues and stakeholders begin meeting to form National Independent Venue Association.

Figure 3. Information confirmed from multiple industry sources with the infographic created by the author on Canva.

Interviews

In regards to the eleven interview participants, ten identified as live event professionals⁷. Leading into 2020, schedules for these professionals were split between somewhat and extremely busy. **All** interviewees identified March as the beginning of particularly disruptive COVID-19 upheavals, with several indicating ‘naive’ initial projections of six to eight weeks worth of displacement. Subsequently, 100% of the live event professionals reported negative impacts on revenues or returns in 2020 as a result of COVID-19. During this time, 90% of participants engaged in modified music events such as drive-ins and live streams. These efforts were widely recognized as being beneficial solutions given the constraints of a global pandemic however lack the authenticity of an in-person live music experience. Below are the Participants A- K, from which conclusions are drawn.

Participant A: Production Crew, Male

Participant B: Musician, Male

Participant C: Event Tech Specialist, Male

⁷ It should be noted that *all* participants identified as music enthusiasts, regardless of being professionally involved within the industry or not.

Participant D: Event Tech Specialist, Female

Participant E: General Manager of Music Venue, Male

Participant F: Musician, Male

Participant G: Musician, Male

Participant H: Media & Marketing, Male

Participant I: Music Industry Professor, Female

Participant J: Ticketing Director, Male

Participant K: Box Office Manager, Male

In respect of the participants' willingness to provide both personal and professional perspectives throughout the culminating experience, anonymity here is critical to protecting identity and information. With this, it should be noted the interviews varied in length, though the focal points were directed around specific questions to highlight specific topics. These semi-structured interviews held with professionals and fans of live music illustrate the immense challenges, as well as opportunities, presented throughout this crisis. In addition to the hard data collected through interviews, reports, and surveys, several trends emerged regarding participants' sentiments and projections. Across the board, music fans and professionals were forced to pivot and abide by COVID-19 restrictions. However, applying these procedures and mandates differed vastly between respondents and their locations.

Responses for question one consistently described 2020 as a year that behaved very differently from what was originally planned. **All** of the interview participants reported experiencing upsets in live music directly due to COVID-19, several of which were forced to

make calls on events mere hours before showtime. Question two again had participants generally aware of murmurings surrounding COVID-19 at the beginning of 2020, with things rapidly changing by mid-March. This fell in line with other research findings, which saw the industry virtually stop over the period of a week in March. The consensus at the time was that a shutdown might be inevitable, however brief. What was originally thought to be only six to eight weeks of pain rolled into over a year of suffering. Responses to question three noted not only the disjointed effort at making information accessible, but the reliability and communication of it as well. With insurmountable unknowns looming, people across the industry were forced to make hard calls in attempts to survive the initial blow. Majors and independents alike employed cost saving measures with 90% of interview participants seeing a negative impact on business as a direct result of this pandemic. Over half of respondents went on to engage with COVID-19 compliant events throughout 2020, with livestreaming being the preferred medium. Although nice alternatives, interviewees unanimously agreed that these could not fully replace the live event experience. In regards to opportunities and innovations brought to the forefront by this pandemic, live streaming was frequently mentioned. These virtual spaces in particular have allowed audiences to remain connected and enjoy experiences without the need to mass gather. Through this the capacity for a live event extends past its purely physical capacity and enables viewers worldwide to participate. Additionally, sensory issues which may traditionally keep one from enjoying the live event in-person can instead be part of the event from the comfort of their own home. The need for the internet to participate in modern society has been made clear as humans were forced to rely on it for education, entertainment, and even emotional connection throughout this time. Additionally, respondents noted a new appreciation for live music, as well

as one another. What may have once been taken for granted as a staple in society now risked staying silent- forever. Without collaborating and supporting one another, the events near and dear to our hearts were in danger. The loss of live music comes with heavy economic, mental, physical, and emotional tolls, which *all* of the participants acknowledged and experienced in some fashion throughout the pandemic. In summation, though 2020 is widely recognized as being an unprecedented, challenging, and uncertain time, there have been bright spots and lessons learned along the way. Participants from both majors and independents noted how the live music industry is an exhausting, yet fulfilling and exciting experience. Key lessons shared by these individuals are below. Additionally, a summarization of research and interview findings can be found in Figure 4.

- A. Importance of social contact through events is infinite.
- B. Value of music extends into identity, culture, and communication.
- C. Technology allows for further democratization of music.
- D. Changes can also help us learn.
- E. Do not take for granted the live events which enrich and connect our communities.
- F. There is a lot of room for growth and innovation.
- G. In our experiences with music, we should learn to appreciate and support it.
- H. The arts are for everybody and should be easily accessible.
- I. These disruptive times can inspire love, respect, and collaboration throughout the industry.

- J. Hopefully businesses and individuals can learn from this to prevent it from happening again.
- K. Music remains an important way to discover, create, and connect with others.

Similarly, respondents were asked where there might be opportunities moving forward including:

- A. Adapting and pivoting remain crucial as circumstances develop.
- B. Without smaller independents, artists have nowhere to grow.
- C. Artist compensation rates remain low and need technological revolution.
- D. Communication and leadership are needed in times of crisis.
- E. Opportunity costs v risks at live events.
- F. Industry depends on further research, development, and infrastructure .
- G. How to evaluate survival through unforeseen challenges.
- H. The industry is constantly evolving and requires adaptation.
- I. Our need to connect through music is innate and will always find a way to be heard.
- J. Changes can be both unforgiving and unpredictable.
- K. Strong leaders will necessitate safely moving forward.

COVID-19 IMPACTS ON LIVE MUSIC

Although there has yet to be a definitive conclusion to the pandemic, promising progressions have been made as vaccination rates climb. Subsequently Live Nation 2021 Q1 results showed a high demand for live music's safe return.



Numerous music festivals including Bonnaroo, Electric Daisy, and Travis Scott's Astroworld have sold out in record time for 2022. Heading into 2023 and beyond trends indicate strong return growth, though ultimately event modifications continue to be made and monitored per the appropriate local response.

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Majors and independents alike have participated in interest of the common goal: save live music. With support from sources throughout the industry, live music has banded together in solidarity and strength. A healthy musical ecosystem demands space for independents and majors. Further constriction would negatively impact music artists, fans, and professionals in condensing power and accessibility into the hands of few.

The keys to success for moving forward (as provided by interview participants) include:



- Remain flexible and willing to collaborate at a moment's notice.
- Out of disruptive change can also encourage growth, learning, and creating.
- Appreciate and support live music, as the industry and its fans rely on one another for survival.

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National Independent Venue Association (NIVA)



This organization calls for long and short term support (and reform) for the local, independent venues struggling to survive the COVID-19 pandemic. NIVA and SOS Act have successfully garnered attention and resources for the live music industry, demonstrating its value to the economy, arts, culture, and society overall.

Crew Nation



Efforts from Live Nation's Crew Nation enables artists and live event workers to apply for aid and resources. Reportedly raising over \$18 million, music fans can also support efforts by choosing to donate, represent 'crew' merch, or get involved with its mission.

Sound Diplomacy



Sound Diplomacy is an instrumental organization at the forefront of education and revitalization to ensure robust music environments for creatives and consumers. With abundant research and a passionate team, this company seeks to strengthen musical landscapes around the world.

Figure 4. A glimpse into the future for live music with efforts for recovery, relief, and support. Sourcing provided by respective organizations in addition to infographic created by the author.

Conclusion

In conclusion the pandemic has severely impacted not only live music, but the world and its people. As reported by first-hand accounts in addition to the completed research, live music's absence reiterated its value as a resource to individuals and communities alike. In consideration of the lives and livelihoods at stake, live music hastily pivots to survive and remain heard around the world. With detrimental personal and professional sacrifices and losses witnessed along the way, the industry has depended on working together to survive a generationally defining pandemic. Music has proven louder than mere entertainment and economic pillars of modern life, but also as important methods for communication and connection throughout this time. Not only is it intertwined into the basics of environments and identities, the need and demand for live music improves health and culture too. Industry published surveys, interviews, reports, and research repeatedly illustrate how music harmonizes humans' ability to think, feel, move, connect, and progress. The included data found these disruptive moments as simultaneous launching pads for change. Without a clear ending to the pandemic at the time of this writing, the situation should be actively monitored and cohesively addressed because negligence to do so comes at huge costs. Particularly given the importance of live music, efforts to support and collaborate will be instrumental in helping the industry regain its footing both short and long term. Immediate relief is absolutely needed, though continued attention will also be required for introducing foundational support to protect live music and its professionals. Policy reform and

technological innovations stand to transform live music's trajectory, some of which were necessitated as responses to this crisis. Through shape shifting and collective action, the industry has again proven its perseverance and passion. Put simply, this culminating experience concludes that life is not the same without live music experiences and memories given its extraordinary ability to uniquely meet basic human needs and desires. Although unsure *when* the industry will fully return, this pandemic has shown that the show must undoubtedly go on and live music never stays silent for long.

Questions for the Future

The long term effects from this pandemic may take time to reveal themselves, however the industry will continue to move forward in its planning for the future. Technological advancements and digital spaces have opened the world past its physical boundaries. Leaning into these technologies and better intertwining into events going forward will be crucial to gaining an engaged worldwide audience. Will there be continued collective efforts for policy reform and support? How can businesses and individuals maintain the momentum of protecting both the art and its creators? Why are these important steps for securing an equitable, vibrant music community? For music fans and professionals alike, the return to live events is inevitable and eagerly awaiting. The only way to get there however will be together.

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