

#ReviveLive Music

National survey of 25,000 live music fans
May 2021



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Introduction

As the UK vaccination programme moves forward, test events go ahead, and the UK Government's roadmap looks to reopen venues and events, it was important to explore how live music fans feel about returning to live music.

The research was led by LIVE Chief Economist Chris Carey in association with Katy Raines and Flo Carr from Indigo Ltd.



Methodology

The survey was distributed by the membership of LIVE, ensuring a good coverage of events of all shapes and sizes.

Over 25,000 responses were collected from UK live music fans. These responses were then weighted to reflect the age and gender demographics of the ticket buying population.

As such, this reports gives a representative indication of the attitudes, behaviours and current thinking of live music fans in the UK.



Key findings



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Key Findings: Fans are ready!


Fans are confident: They want live music, and they want it now. Over 75% of fans are either ready to go right now, or with some mitigation measures in place.

They want a normal experience: 53% would come to gigs with no extra hygiene considerations. Masks and socially distanced seating were most likely to deter fans from attending, especially in the youngest age groups.

Tickets are selling: 73% of fans have already bought new tickets, and 1/3rd of those who haven't yet just haven't seen something they wanted to go to.

Demand for live has grown: Despite the pandemic, fans are more passionate about going to more shows than before!

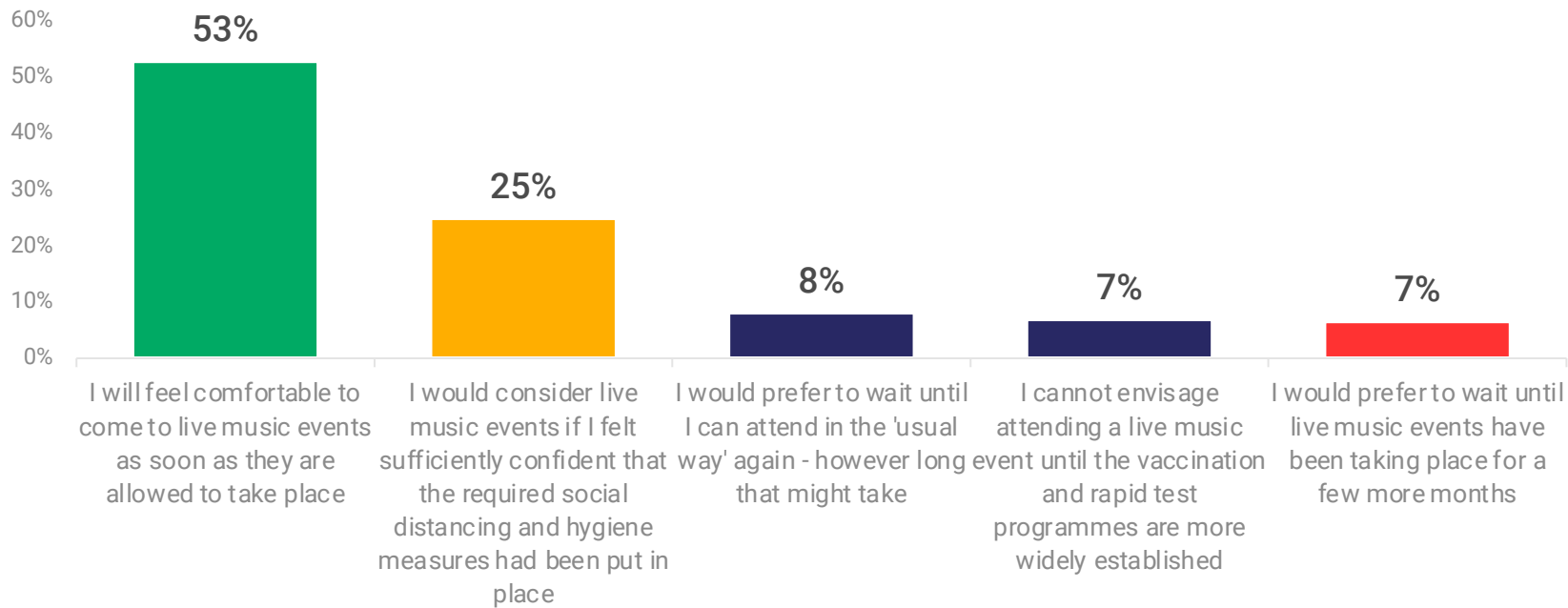


A photograph of a concert crowd with warm, golden lighting. In the foreground, two hands are raised and joined to form a heart shape. Other hands in the background are also raised, some forming smaller heart shapes. The overall atmosphere is energetic and celebratory.

Fans want to get back to live!

Fans want to get back to live music asap

How do you currently feel about attending live music events?



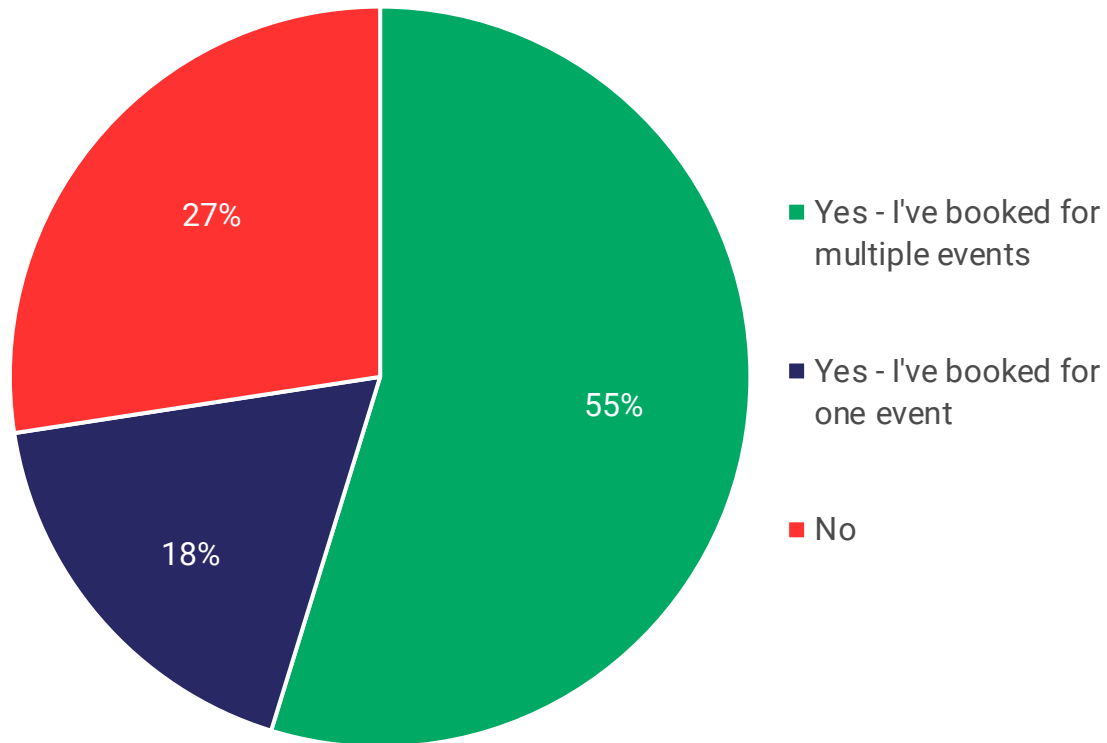
Over half (53%) of respondents will feel comfortable returning to music events as soon as they are allowed to happen.

A further quarter would consider returning if they were confident in the safety and hygiene measures in place at the venue.

Looking at the youngest age group, 75% of under 24s are comfortable returning to events as soon as possible.

And those fans are spending money now

73% of fans have booked tickets for future events already.



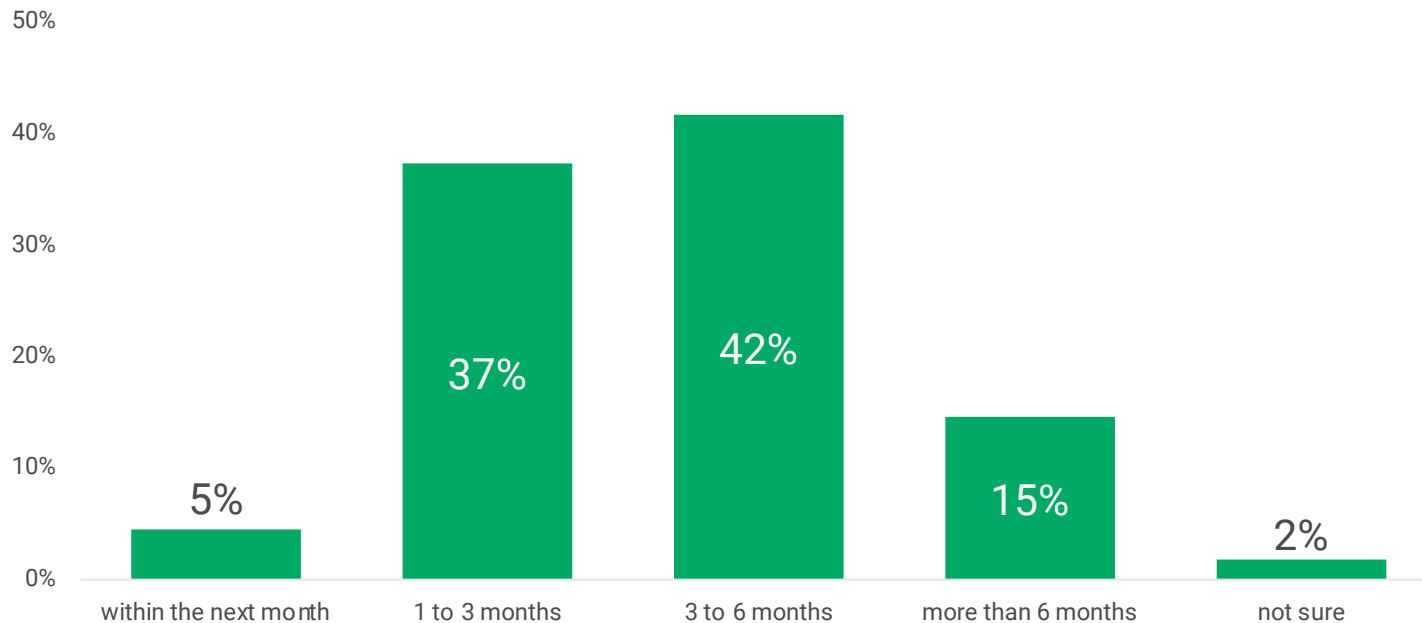
One concern for the sector was whether people would be cautious or whether they would be quick to engage with music.

The results are extremely encouraging with almost three quarters (73%) of respondents having already booked for a live music event. Over half (55%) have booked for more than one event.

The youngest age groups are quickest out of the gate with 66% of under 24s buying multiple tickets already.

Of those buyers, 42% will attend by July

Most fans have bought tickets for events within the next six months

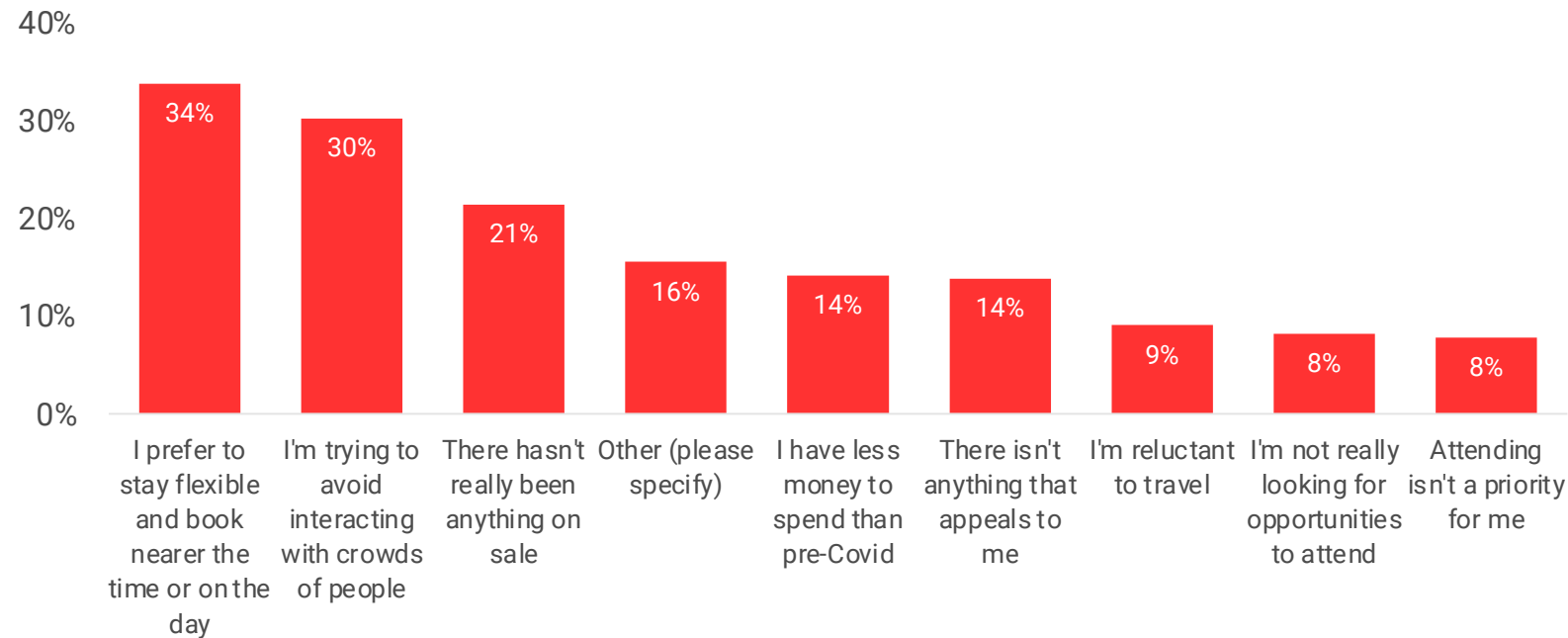


When we consider the 73% of people who have booked, confidence is high and they are eager to get back to live as quickly as possible.

Over 40% of ticket buyers will be attending a show by July.

Yet to book? Crowds & supply of shows

Crowds, flexibility and availability are the key reasons people haven't booked yet.



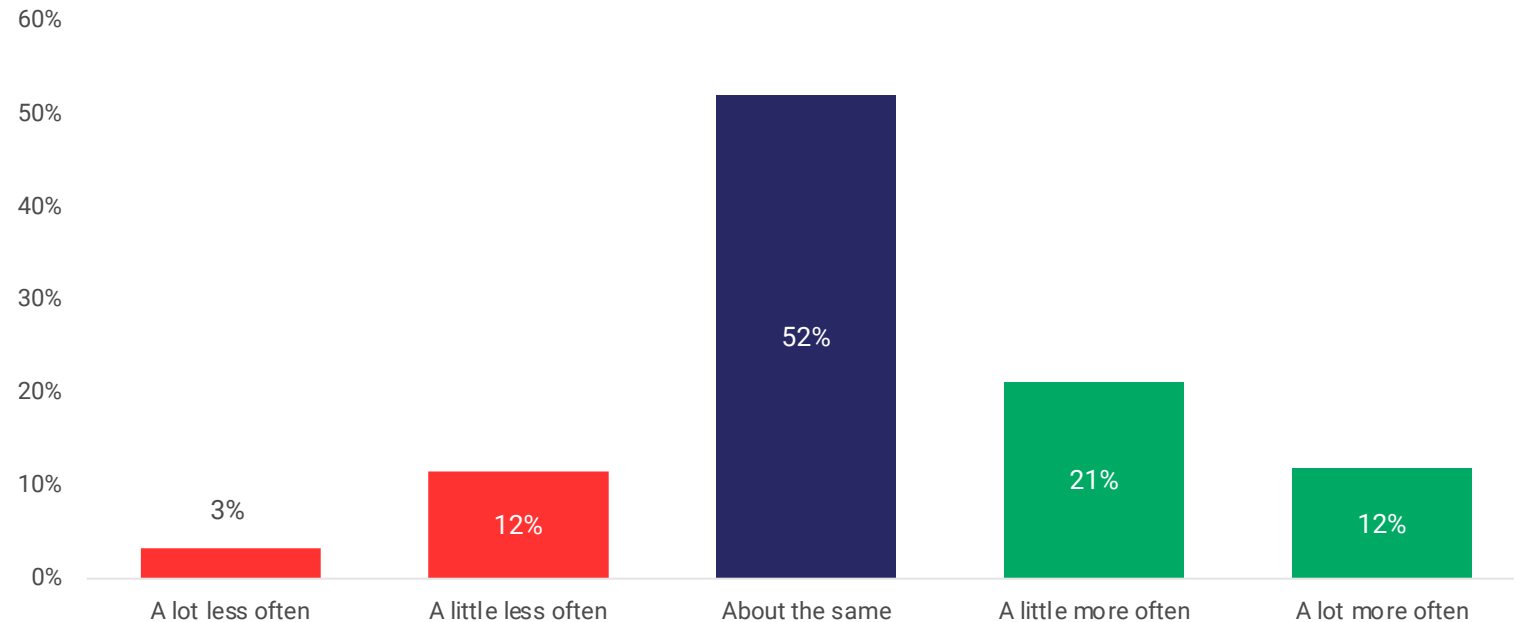
When asked why they had not booked, a third preferred to remain flexible and book nearer to the time, and 30% wanted to limit their interactions with crowds.

Age was not a factor when considering crowds but younger fans have been most financially affected by the pandemic.

Importantly, 1/3rd of those yet to purchase would have done so if more shows had been on sale (21%) or if something had appealed to them (14%).

Fans will see music more than before!

When events come back, people plan to go more than ever!



Overall, the appetite for live music events remains strong.

Half of all people surveyed will go back to their old consumption habits.

While 3% of fans will go a lot less often than before the pandemic, a third of attendees say they will attend more (21%) and 'much more' (12%) frequently than they did before Covid.

A large crowd of people at a concert, many holding up light sticks and phones. The scene is illuminated by warm stage lights, creating a hazy atmosphere. In the background, a sign reads "NO STAGE DIVING OR CROWD SURFING".

Most safety measures are a balancing act

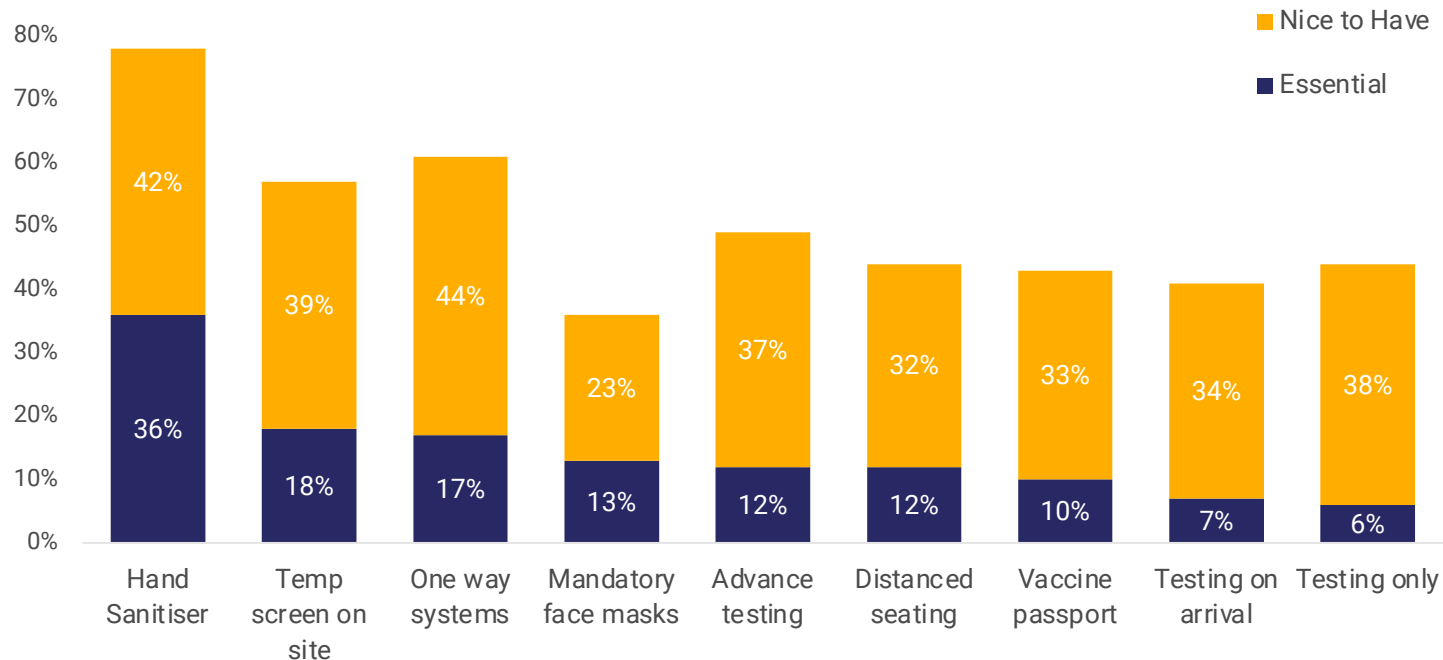


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Masks & testing not essential for fans

When presented with a range of measures to help ensure safety, only the simplest of measures was considered to be essential.



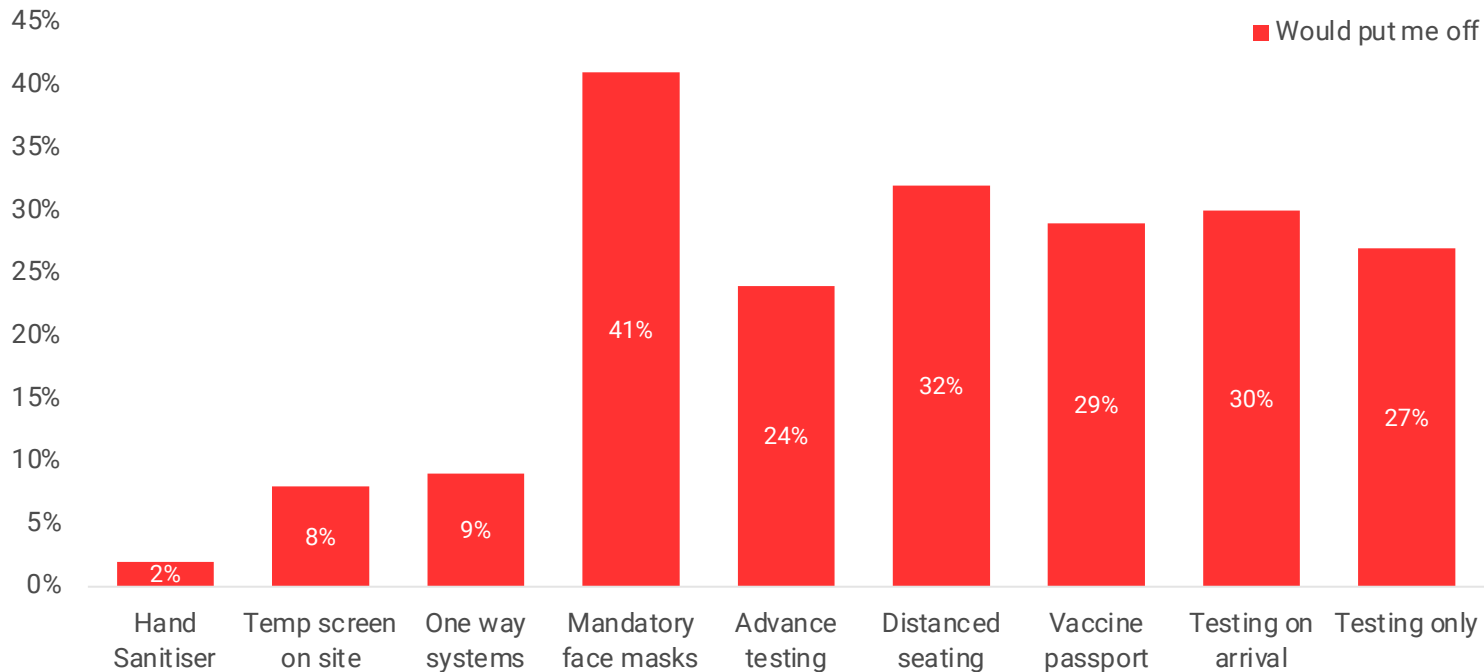
Music fans are largely indifferent to most of the Covid measures potentially being proposed.

There was a broad appreciation for a variety of measures seen as nice to have.

The availability of hand sanitiser is the only essential for most music fans to feel safe returning to events.

Masks and social distancing deter fans

Only hand sanitiser, temperature screening and one way systems appealed.



However, some measures would deter fans if they were implemented. Mask wearing during the show (41%) and socially distanced seating (32%) saw the strongest rejection.

Half of under 24s said socially distanced seating would put them off attending.

The vaccine passport was a much larger deterrent for those under 30, who have had less access to vaccinations.



Fans missed friends,
joy, escapism and artists.

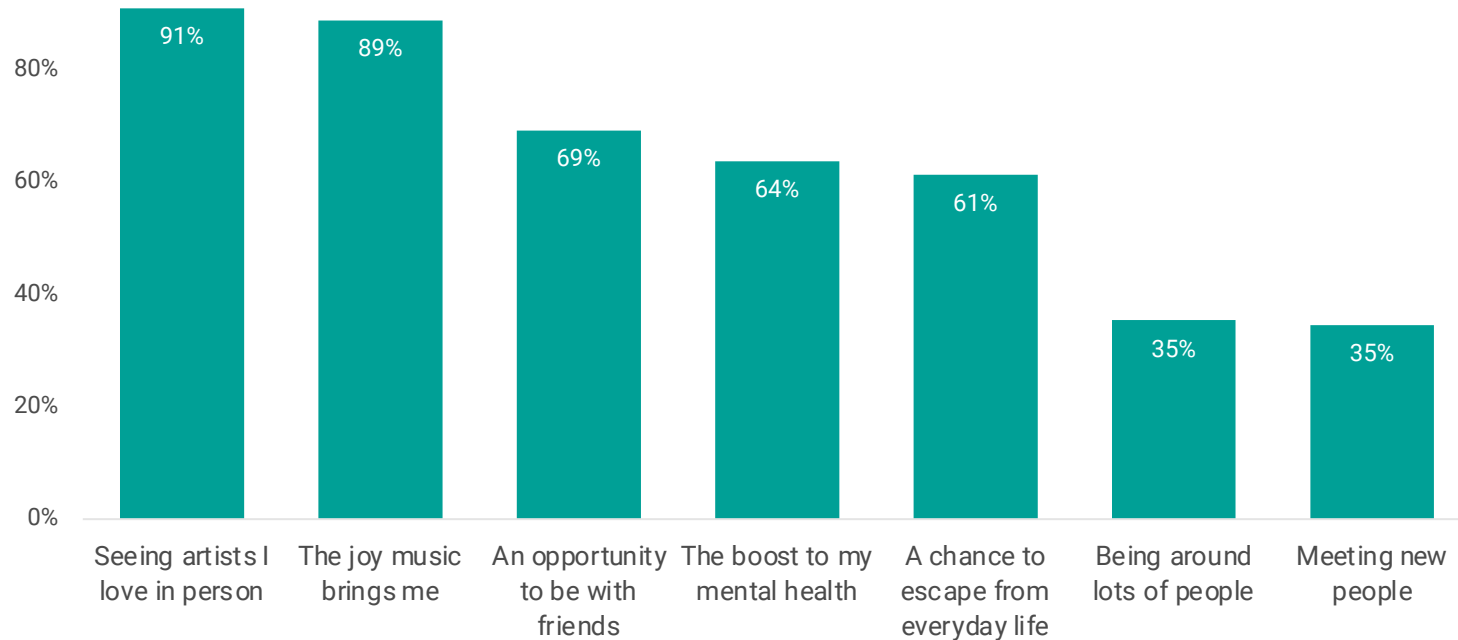


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Fans missed friends as well as music

Nothing can compete with the joy music brings, but it's important for social interaction and gives a mental health boost to 2 in 3 fans.



Overwhelmingly, music fans have missed seeing the artists they love (91%), and the sheer joy of music (89%).

They have also missed being able to spend time with friends at live music events (69%) and the boost to their mental health as a result of attending (64%).

There were very few variations between age groups highlighting live music's consistent appeal.



Live fans moved online,
many want to stay too.

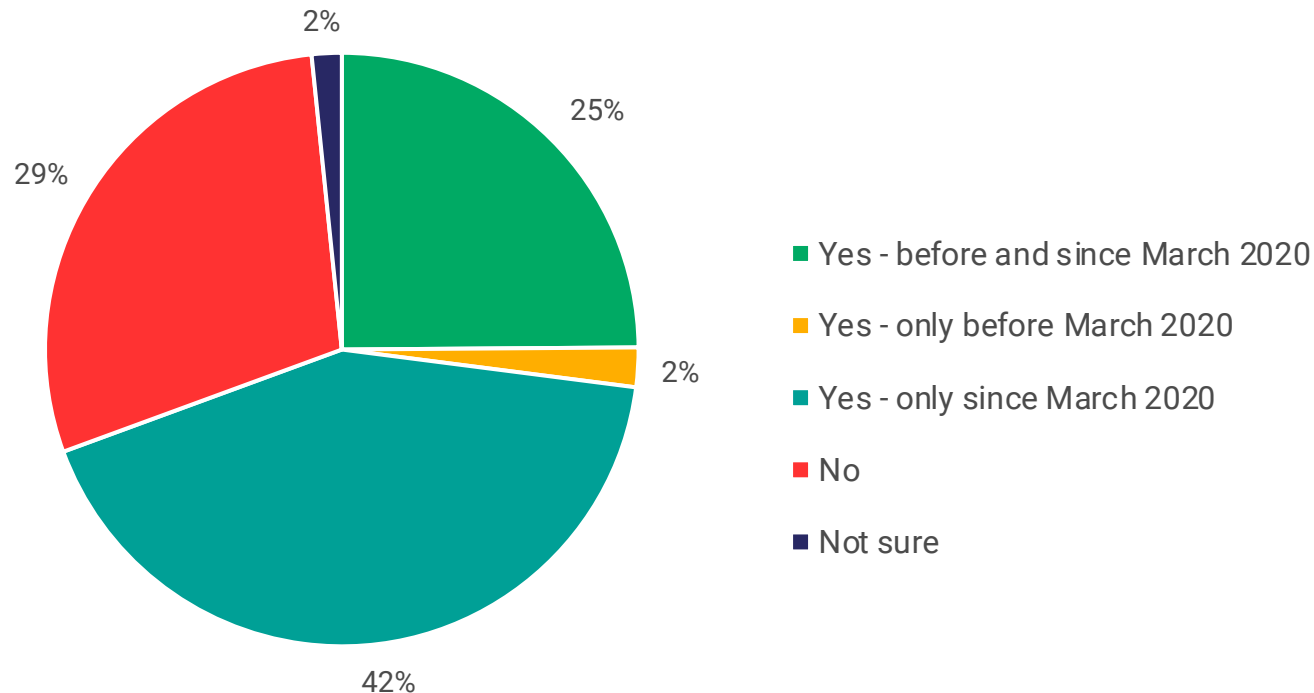


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Online events filled a void for fans

Around 70% of fans engaged with live music online during the pandemic.

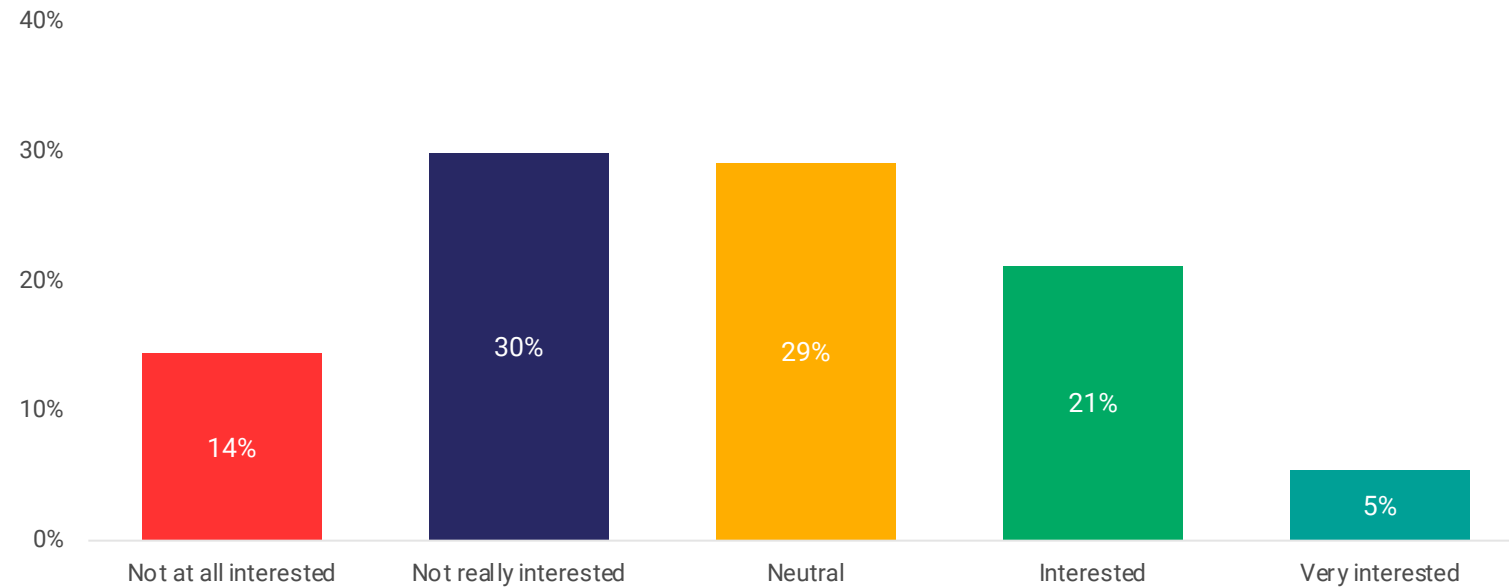


As artists and organisers innovated during the pandemic nearly 70% of live music fans have seen live music performances online since March 2020.

Looking at the profile, over half of those were new to watching live shows in this way.

There is still demand for online events

Online events won't disappear even as real life events return, with 1 in 4 fans interested or very interested in attending online.



Around 1 in 4 respondents said they were interested in engaging in online music events in the future.

This could prove an interesting way for artists to keep in contact with fans in anticipation of shows.

While the preference for being in the room is clear, virtual shows could become a growing revenue stream for the live industry as fans who cannot make the show purchase the virtual ticket instead.

#ReviveLive Music

LIVE is the voice of the UK's live music business. The organisation was initially formed to tackle the unprecedented challenge from COVID-19 and it launched formally in March 2021. LIVE members are a federation of leading live music industry associations representing 3,150 businesses, over 4,000 artists and 2,000 backstage workers.

Indigo Ltd provides smart, sensible and practical consultancy for the cultural sector in the UK and beyond. During the COVID-19 pandemic they have been at the forefront of tracking customer sentiment to enable the return of live events, working with arts and cultural organisations across the UK, Ireland and Italy.
www.indigo-ltd.com

LIVE members are:

- Association of Independent Festivals (AIF)
- Association for Electronic Music (AFEM)
- Association of Festival Organisers (AFO)
- Association of Independent Promoters (AIP)
- British Association of Concert Halls (BACH)
- Concert Promoters Association (CPA)
- Featured Artists Coalition (FAC)
- The Entertainment Agents' Association (TEAA)
- Music Venue Trust (MVT)
- Music Managers Forum (MMF)
- National Arenas Association (NAA)
- Production Services Association (PSA)
- Society of Ticket Agents & Retailers (STAR)



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