

Live FM: FAN MONITOR

20
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Edition

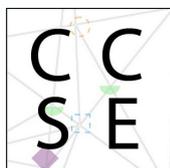
Analysis of attitudes and behavioral trends of music fans in **Germany** and **Scotland** during the Covid-19 pandemic.

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LiveInnovation.org is an independent academic initiative. Its mission is to develop and share research and educational content. It focuses mainly on marketing related topics applied to contexts of live experiences.

Live FM: Fan Monitor is a research project aimed to collaborate with and contribute to industry stakeholders, students, academics and life learners. We aim to share research findings in an accessible format and shed light to relevant issues in the entertainment sector.

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WELCOME

Live FM: Fan Monitor

2020 Edition

The year of 2020 will be forever remembered as a time of unprecedented challenges for humanity. Unexpectedly, life on earth changed in a matter of weeks.

The nature of the Covid-19 pandemic revealed one staggering reality for the entertainment sector: as human gatherings were forbidden, the industry came to a halt.

In my mind, this challenging scenario required one important action: the development of a permanent tool to monitor perceptions and future intended behaviors of fans of live experiences, such as music.

After all, our perceptions of safety and security, service quality, experience consumption, risk and consumer expectations, among many other factors, will not be the same as they were in late 2019.

With this in mind, I envisioned the "Live FM: Fan Monitor". It represents our way of contributing to the industry to support managerial actions and decisions. Furthermore, to shed light on current impressions and behaviors of fans.

This first edition, of hopefully many, focuses on two relevant markets: Germany and Scotland, and a collaboration between scholars from IUBH University of Applied sciences and the University of the West of Scotland.

Results presented here, however, are not representative of their populations, as non-probability sampling techniques were applied and samples are too small for results to be generalized. Nevertheless, findings reveal relevant insights of music fans on both countries.

Although the near future still seems extremely challenging for the industry, a bright future is expected. Historically, pandemics, and the social isolation it causes, are often followed by intense human rush for hedonism. The demand for pleasurable experiences will be very high.

When this happens, the industry must be ready to take timely actions to enable the creation and delivery of innovative and memorable experiences, tailored to the new needs of fans.

It will require creativity, action and openness for a paradigm change: old solutions will not solve new problems. However, I am confident the entertainment industry will strive, as it always does. But for now, let us discuss what the current trends of concert goers are.

Welcome to the 2020 Live FM: Fan Monitor!



Prof. Dr. Francisco Tigre Moura

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EXECUTIVE SUMMARY

The analysis comparing music fans from Germany and Scotland did not suggest striking differences between markets. In general, attitudes and intended behaviors followed fairly similar trends.

Overall, respondents indicated moderate concerns towards Covid-19 infection and the need for clear and rigorous application of health and safety measures once concerts return. Addressing these consumer issues will be a fundamental step for success.

Furthermore, results suggest that fans expect that live experiences will not be the same as they were, prior to the pandemic, with less socialization.

Despite the high number of ticket cancellations among respondents, it is clear their commitment to attend them once concerts are once again allowed. The pandemic has not impacted loyalty. And is expected to have positively impacted the need for experience consumption.

Results also reveal a very low awareness of actions made by brands to support musicians and the industry during the pandemic. It seems as a lost opportunity for brands to be associated with positive actions and timing.

In regards to technological innovation, virtual reality has rarely been used as a solution for the lack of concerts in both markets. Furthermore, Instagram live streaming seem to have reached saturation, according to the attitudes of respondents.

For the future of live experiences and the industry, respondents have called for greater interactivity with artists, greater possibilities of live streaming, and further support from the industry to artists. Especially in regards to fairer financial return to streaming and support in promoting musicians.



METHODOLOGY

The data here presented was collected online in Germany and Scotland between the months of September and November of 2020. The measurements were defined through a thorough discussion among the scholars and industry stakeholders. The population of the study was defined as active music concert goers, based on their frequency of attendance on the year of 2019.

For the data collection, a non-probability sampling technique was applied. Convenience and snowball sampling methods were applied. The survey was distributed directly and indirectly on university mailing-lists, shared on social media platforms of the institutions and of the researchers, to industry stakeholders and on LiveInnovation.org.

Although the project was not funded, gift vouchers were raffled to motivate participation. A total of 616 respondents answered the survey. After data screening, a final valid sample of 454 respondents was used for the analysis (Germany= 343; Scotland=111). An online survey platform was used for the online questionnaire and the analysis was conducted on SPSS V25 and tests of frequencies, cross-tabulation, Chi-Square, independent Samples t-Test and ANOVA were applied to the data.

LIMITATIONS

The non-probability sampling technique, total sample size and profile of respondents represent limitations of the study. Thus, findings are not representative of the populations, and thus, results cannot be generalized.

Moreover, the data was collected during a period of constant attitude change and general uncertainty, given the developments of the pandemic in each country and how the respective governments defined actions and policies. In such scenarios, cross-sectional data collection represent another limiting factor.

PROFILE OF RESPONDENTS



454 valid respondents



111 valid respondents



46.6% male respondents
54.4% female respondents
1% chose "other" as gender



27.1% male respondents
72.9% female respondents
0% chose "other" as gender



92.2% between the ages
of 18 and 35 years old



61.4% between the ages
of 18 and 35 years old



17.6% High-school degree
68.1% Bachelor degree
9.5% Post-graduate degree



9.4% High-school degree
61.5% Bachelor degree
20.8% Post-graduate degree



25.9 % fans of electronic music
42.9% fans of pop music
37.9% fans of rap/hip hop music



41.4 % fans of rock music
39.6% fans of pop music
44.1% fans of indie rock music

Topic of investigation

01

COVID 19 AND MUSIC CONCERTS



The first section of the study investigated respondents perception of the virus and the pandemic. Moreover, it measured how much the pandemic influenced their trust on attending concerts and how they perceived future experiences to be.

During the interpretation of findings, please be aware that during the months of data collection Germany and Scotland faced different challenges regarding the development of the pandemic in the respective countries. Not only the spreading of the virus was different in each country, but also how their governments dealt with the situation.

Fears and Concerns

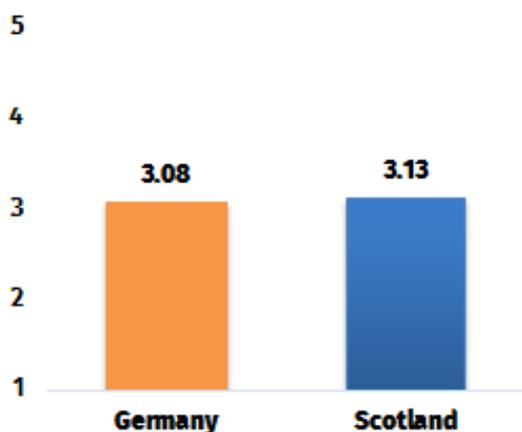


Of total **German** respondents are "very" or "extremely" concerned of contracting the Covid-19 virus.



Of total **Scottish** respondents are "very" or "extremely" concerned of contracting the Covid-19 virus.

How concerned are you with contracting the Covid-19 virus?

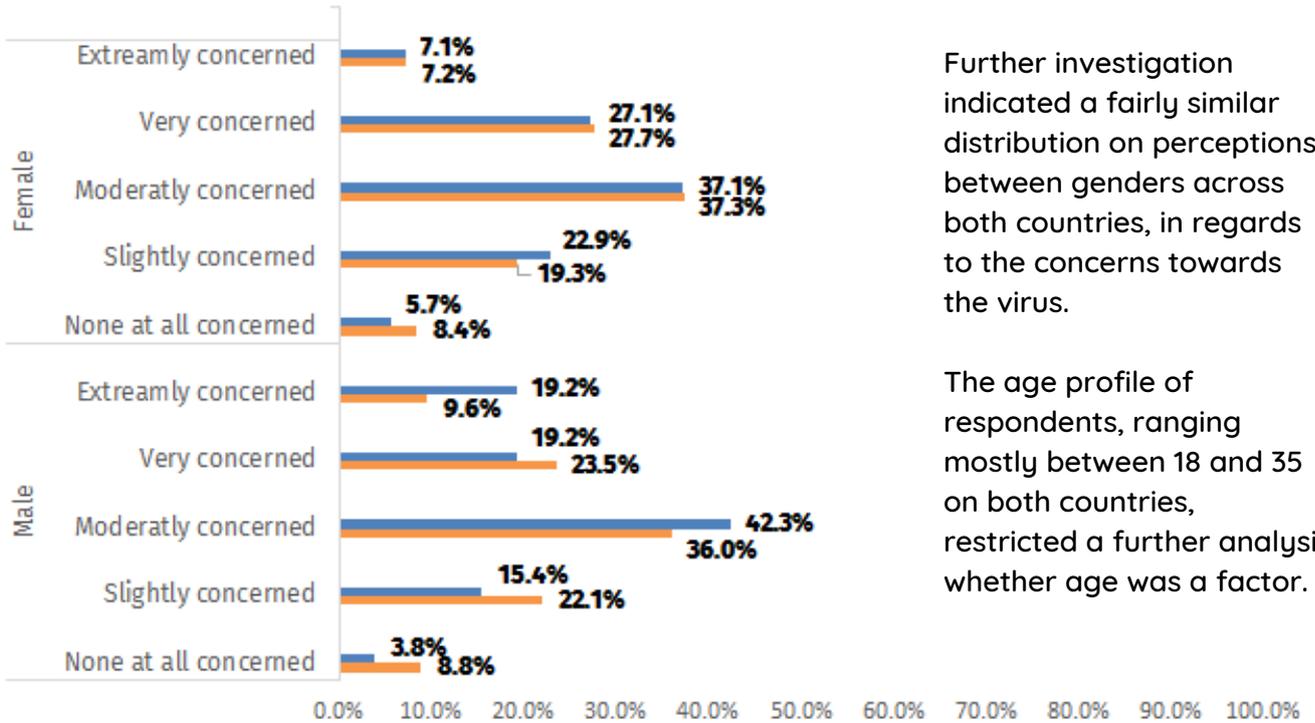


Scale ranging from 1- Not at all concerned, to 5 - Very concerned.

In general, German and Scottish respondents revealed a moderate concern towards the idea of contracting the virus. This is especially relevant for future return to live experiences, as a desensitization, due to overexposure of the topic, is to be expected.

Moreover, further analysis revealed no significant statistical difference when comparing the perceptions of respondents from both countries.

How concerned are you with contracting the Covid-19 virus?



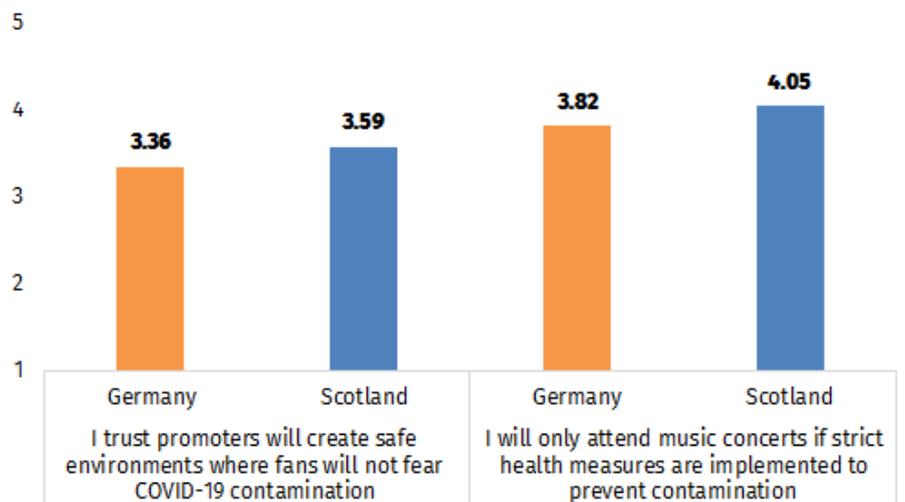
Further investigation indicated a fairly similar distribution on perceptions between genders across both countries, in regards to the concerns towards the virus.

The age profile of respondents, ranging mostly between 18 and 35 on both countries, restricted a further analysis whether age was a factor.

Overall Expectations

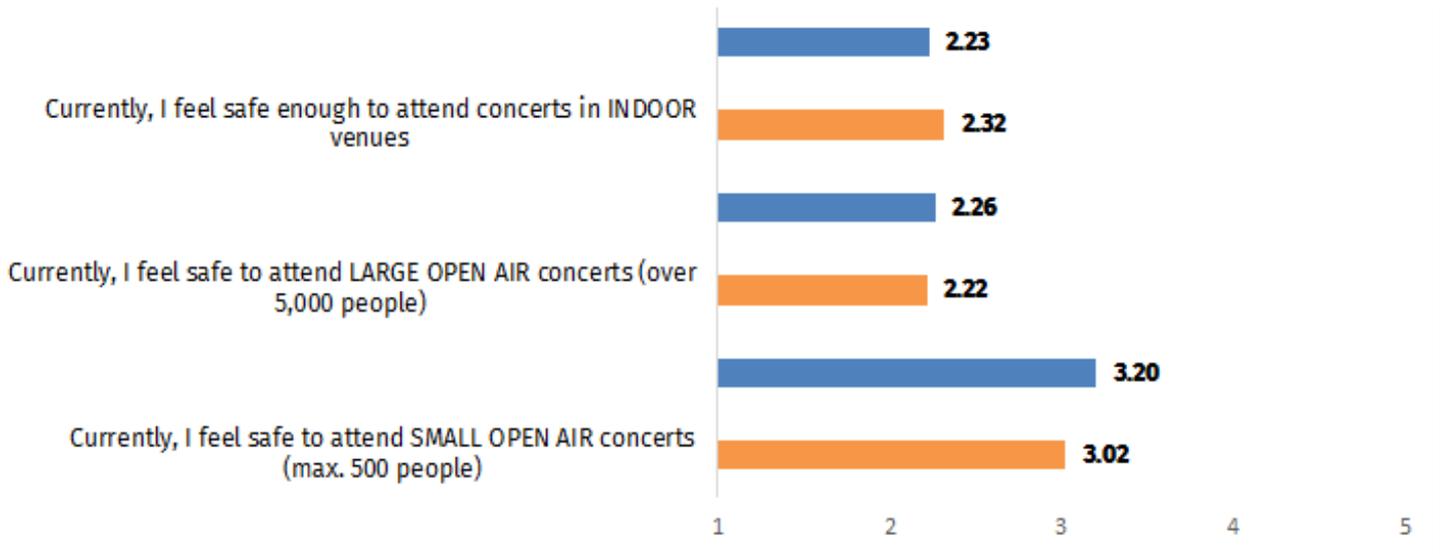
Further questions investigated the perceptions and expectations of respondents towards the consumption of live experiences. It measured, for example, the extent to which respondents trusted that strict health measures would be taken and also that promoters would be able to create safe environments in regards to the virus.

Interestingly, further analysis revealed statistical differences when comparing both countries. Thus, Scottish participants seem to have greater trust that safe environments will be created and also that they will only attend if measures are implemented, when compared to German respondents.



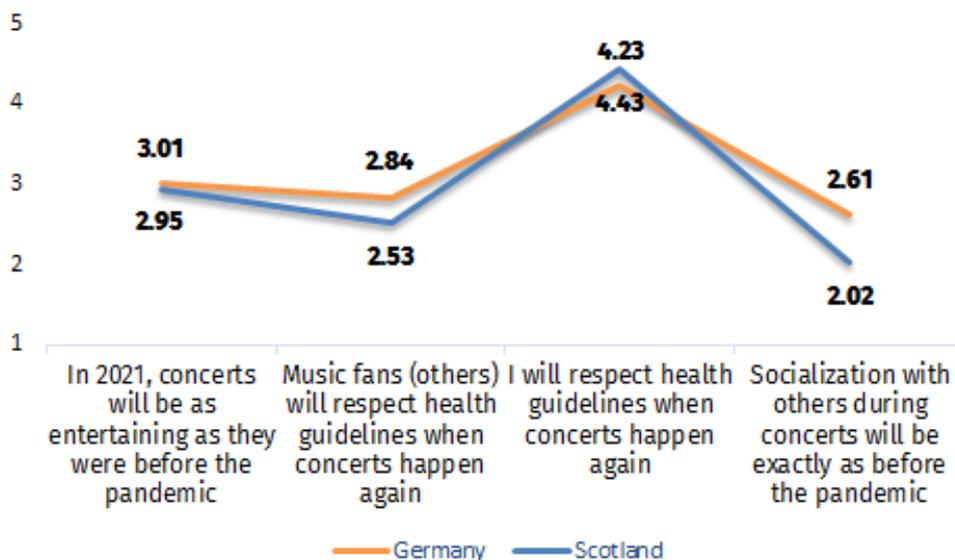
Scale ranging from 1 - Fully disagree, to 5 - Fully agree.

Given the contagious nature of the pandemic, it was also important to investigate the perceptions of respondents towards attending different types of venues. Here we display findings regarding three types concert venues: indoor venues, open air with large gatherings (over 5,000 people) and open air gatherings with small gatherings (maximum of 500 people). Findings revealed no statistical significant different between the countries. Moreover, as expected, respondents from both countries were not feeling safe to attend indoor concerts and were more inclined to attend smaller open air, rather than large open air events.



Scale ranging from 1- Fully disagree, to 5 - Fully agree.

Also, findings indicated that respondents were unsure whether concerts in 2021 would be entertaining. And there was no significant different between the countries. Furthermore, respondents from both countries were rather skeptical if others will respect health guidelines, with Scottish respondents being significantly more pessimistic. Scottish respondents were also significantly more negative as to the expectation that socialization will be as before the pandemic.



Scale ranging from 1- Fully disagree, to 5 - Fully agree.

Interestingly, respondents from both countries responded very positively that they would respect health guidelines in future concerts.

Disclaimer: This is a rather normal finding in behavioral studies, when there is a possible socially ethical or responsible answer. Thus, please interpret this finding with care.

01

COVID 19 AND MUSIC CONCERTS

KEY INSIGHTS

Findings from the analysis of music fans in regards to the Covid-19 virus and expectations towards future events revealed important insights:

1

Respondents from both countries revealed a rather cautious overall perception towards attending large gatherings and preference for open air with smaller crowds.

2

Concert goers are still cautious about gatherings. Organizers must be careful with planning of large outdoor and indoor events. All must be done to deliver and communicate services and messages which can enhance trust through quality management measures.

3

Concert goers will expect a different, perhaps more negative type of socialization experience when concerts return. Nevertheless, generally, they seem to be willing and open to behave in accordance to the new health guidelines.

Topic of investigation

02

MARKETING AND PURCHASE BEHAVIOR

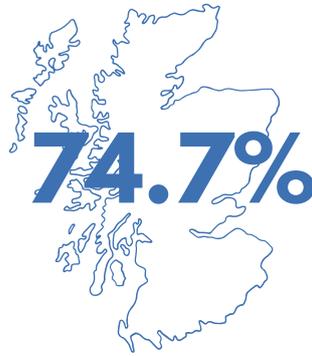


The second section of the study focused on investigating respondents perception towards ticket purchase, ticket selling and intended behaviors. Moreover, it addressed the role of brands and organizations in supporting the industry as it faced its most challenging scenario in the past decades.

Ticket Cancellations



Of total **German** respondents had tickets cancelled for music events in 2020, after the Covid-19 crisis started.



Of total **Scottish** respondents had tickets cancelled for music events in 2020, after the Covid-19 crisis started.

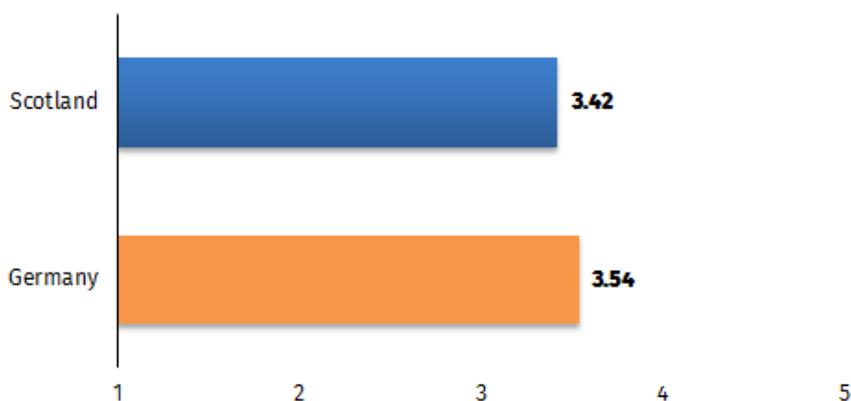
Scottish respondents revealed a significantly higher number of ticket cancellations when compared to German respondents.

Cancellations were found most commonly among respondents between 18 and 35 years. No significant differences were found between genders.

Moreover, despite the high number of cancellations on both countries, respondents revealed a rather positive attitude towards attending these concerts in the future. This represents an important indication to the industry and reaffirms the loyalty of fans to their favorite artists.

Furthermore, no significant statistical different between countries was found.

What is the likelihood you will attend the same concert (cancelled in 2020) in the future?



Scale ranging from 1- Extremely unlikely, to 5 - Extremely likely.

The second section of the study investigated respondents perception towards ticket purchase, selling and intended behaviors. Moreover, it addressed the role of brands and organizations in supporting the industry as it faced its most challenging scenario in the past decades.

Ticket Purchase



Of total **German** respondents had purchased tickets for music events in 2021, after the Covid-19 crisis started.



Of total **Scottish** respondents had purchased tickets for music events in 2021, after the Covid-19 crisis started.

Ticket selling for an uncertain future in 2021 became a solution widely adopted with the hopes of an immediate form of revenue.

Nevertheless, results indicated a very low purchase behavior on both countries. This result, however, is to be expected given the development of the pandemic in both countries.

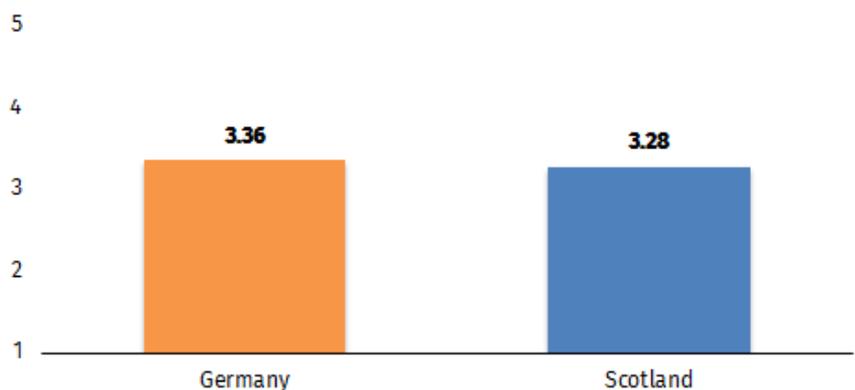
During the entire year of 2020, the end of the pandemic was never certain, which certainly affected purchase behaviors for future events.

In face of this uncertainty, results also indicated a rather high risk perception of respondents in both countries.

And further tests indicated no statistical difference among them.

This reinforces how risk perception influenced purchase behavior.

How risky do you believe it is to purchase a ticket for a concert which will only take place in 2021, given to Covid-19 crisis?



Scale ranging from 1- Not at all risky, to 5 - Extremely risky.

The final of this section is devoted to the support of brands. Given the nature of the pandemic, all tours on main global markets needed to be cancelled. As live shows represent the main stream of revenue for musicians, the pandemic poised a critical situation for the industry. Therefore, a clear support from brands, organizations and governments was to be expected.

Branding and Industry Support

Which brands do you recall having contributed to musicians or the music industry during the Covid-19 crisis?



The most striking finding of this investigation was the extraordinary amount of respondents which could not recall any brand which had supported musicians or the industry during this period.

A few respondents named companies such as YouTube or Apple simply for the fact that live streams were made on their platforms. But not because they had taken specific measures to support the industry during the pandemic period.

From marketing and ethical perspectives, it seems as missed opportunity from, high and low congruent brands with the industry, to have made a stand and long lasting positive impression. And most importantly, to support the industry.

In your opinion, how should BRANDS (e.g. Apple, Sony, Spotify) support musicians and the music industry during the Covid-19 crisis?

Here is a summary of the key themes proposed by fans:

Financial Support Measures

- Enhance royalties
- Fairer financial return from stream platforms
- Development of recovery funds
- Fundraising from more renown artists
- Long-term governmental support
- Reduce musician fees
- Development of global music organizations to raise funds

Marketing Support Measures

- Promotional support of independent artists
- Provide greater opportunity for interaction between established and new artists
- Create opportunities to link artists with brands
- Help connect artists with brands beyond the music industry
- Develop platforms solely devoted for virtual concerts
- Incentivize greater fan engagement

Results from the open questions revealed a great concern from respondents towards the financial and professional situation of musicians, in face of the pandemic. The key theme identified from a financial perspective, is a clear negative perception of "unfair payment" from music streaming companies.

Respondents perceive it as duty for such companies to, in face of the current situation, play an active role in providing fairer financial returns for artists to help alleviate the losses from not being able to perform live.

02

MARKETING AND PURCHASE BEHAVIOR

KEY INSIGHTS

Findings from the analysis of music fans in regards to ticket purchase behavior and perspectives on the role of brands during the pandemic revealed important insights:

1

Ticket cancellations have not influenced the fans desire to attend the live events. This reinforces a high loyalty of fans towards their favorite artists and high involvement with the type of experience. The longer the pandemic restrictions last, the greater is the expected motivation of fans to attend such events.

2

Overall, the risk perception for ticket purchase for a future event is still high. This is expected, given the lack of clarity and uncertainty of the situation. It also suggests that ticket selling for future events may not be a viable solution at the moment.

3

Stakeholders of the music industry have missed a historical opportunity of supporting musicians in need and enhancing their brands by supporting a relevant cause. Respondents overall indicated low awareness of such actions in both countries.

Topic of investigation

03

TECHNOLOGY
AND
INNOVATION



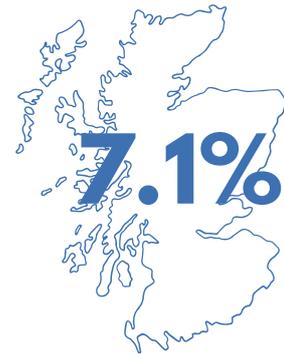
The third and final section of the study focused on understanding how respondent's have tried to replace the lack of live experiences through technology. This way, questions aimed at the main general perceptions and behaviors towards innovations such as virtual reality and live stream of concerts on platforms (e.g. Instagram). Moreover, it also investigated perceptions towards alternative solutions to live experiences, such as drive-ins.

Virtual Reality

Despite its enormous potential and unique possibility of immersive telepresence, the use virtual reality as a means for replacement for live events was minimal on both countries.



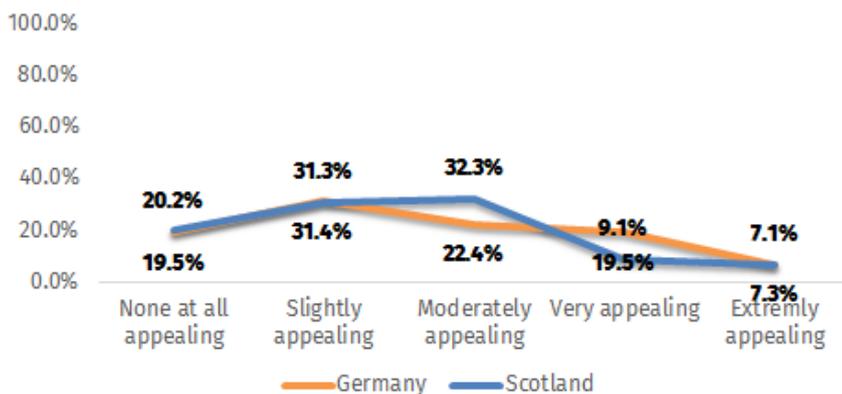
Of total **German** respondents watched virtual concerts using VR glasses, since the Covid-19 pandemic started.



Of total **Scottish** respondents watched virtual concerts using VR glasses, since the Covid-19 pandemic started.

Instagram Lives

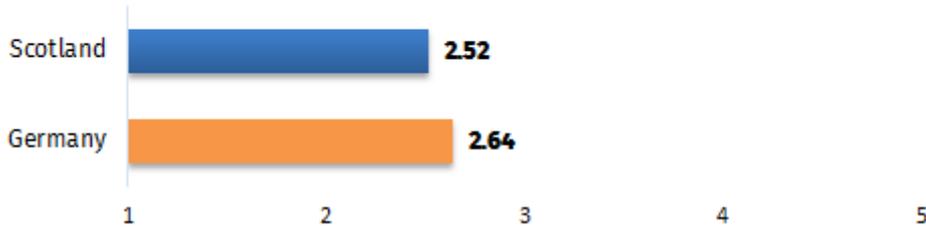
How appealing do you find watching live music concerts streamed on Instagram?



Live broadcasting of concerts on social media platforms, such as Instagram, became a popular solution during lockdowns.

Although being a short-term solution for the lack of live shows, the general perception of fans towards the concept was somewhat low. In Scotland, for example, only 16.4% of respondents found the concept "very" or "extremely" appealing.

How appealing do you find watching live music concerts streamed on Instagram?



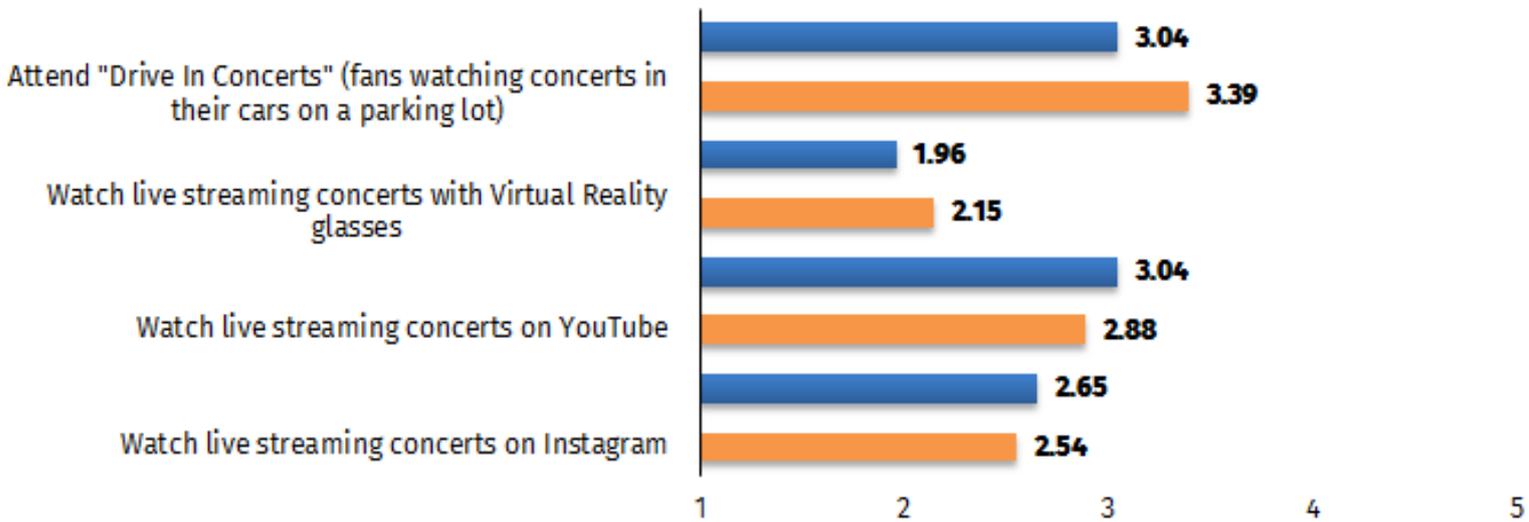
Scale ranging from 1- Not at all appealing, to 5 - Extremely appealing.

The overall evaluation of both countries towards live concert streaming on Instagram reinforces the somewhat negative perception. Moreover, further analysis revealed no statistically significant differences across both markets.

This may indicate the saturation of this type of concept.

Virtual Experiences

When the pandemic is over, what is the likelihood that you will do the following:

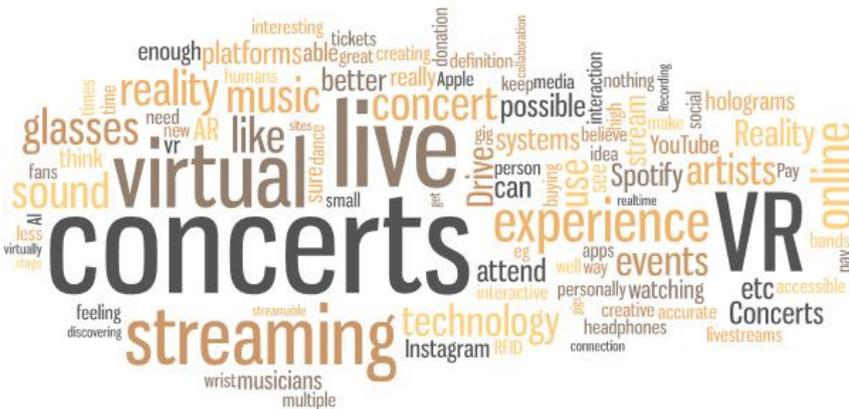


Scale ranging from 1- Very unlikely, to 5 - Very likely.

When reflecting on future behaviors, respondents have rated more favorably an experiences which takes place outside, "drive in concerts", in comparison to virtual solutions. Once again, virtual reality seems to trigger a low desire on music fans. Greater preference for streaming on YouTube, in comparison to Instagram, might suggest an influence of screen size on consumer's preference for the consumption of live events online.

Future Innovations

Which technological innovation would you like to see being applied (or more frequently used) in the music industry for fans?



Furthermore, we asked respondents for insights on innovative technological solutions which they would like to see applied in the near future.

Interestingly, results indicated a high desire for more frequent live performances. Surprisingly, VR technology was very often mentioned.

This finding requires further investigation. Especially given that, in their answers, respondents have called for greater integration, accessibility and co-creation with this technology.

Addressing these issues might solve the current low adoption of virtual reality.

Interactive Relationships

Furthermore, respondents have made claims for closer interactive contact with artists. New solutions such as "online hangouts" and "virtual conferences" on platforms such as Skype or Zoom, which allows fans to establish an intimate type of contact with the artists, were often mentioned.

Access to such interactive online experiences may also be seen a possible a possible new form of revenue stream for artists and for brand activation.

03

TECHNOLOGY AND INNOVATION

KEY INSIGHTS

Findings from the analysis of music fans in regards to technology and innovation revealed important insights:

1

The low use of virtual reality as immersive tool for online experiences in music is an important finding. Further research must focus on understanding if this is due to the perception of the technology itself or due to issues such as access and general knowledge of it, for example.

2

The use of Instagram live as digital solution for artists and brands seems to have reached saturation. Following its high use early on the pandemic, the fairly low evaluation suggests the industry must seek other fresh solutions.

3

On a post-pandemic scenario, fans will appreciate relationships with artists based on an even greater intimacy and interactivity. This type of interactions, driven by technology solutions, should be seen by the industry as an opportunity for monetization and targeted brand activation.

FINAL CONSIDERATIONS

The first edition of the **Live FM: Fan Monitor** has enabled timely insights for the industry. It revealed perceptions and intended behaviors of music fans in two relevant global markets on the year of 2020, during an unprecedented time for the music sector.

Moreover, it provides such insights during a period of real-time interactivity at global level, where all stakeholders involved are trying to find solutions, at the same time, to the exact same problem: **which innovations represent profitable solutions to the lack of live music events?** What we can perceive is that the rush to address this issue, by everyone at the same time, has triggered an overuse of some solution and their life cycles were shortened. As consequence, saturation is reached fast. This trend is expected to remain and calls even greater permanent monitoring of fans' perceptions.

Once again, old solutions will not solve future problems.

For the year of 2021, we aim to further develop this research project. Industry collaborations will be necessary in order to reach an even greater sample size, and enable findings which are able to be generalized to each market involved. Nevertheless, the 2020 edition represents the first step in this direction.

The year of 2021 will most likely still be characterized by the lack of live events or a slow return. Thus, it will call for further investigations, measurement of constructs which were not included here. Therefore, a closer collaboration with the industry will allow a deeper understanding of their current concerns and enhance the relevance of results.

As always, findings will be made available on [LiveInnovation.org](https://liveinnovation.org). For us, the collaboration with other academics and stakeholders, and the openness to make findings available to everyone in an accessible format it is a matter of principle and purpose.

Hope to see you on the 2021 edition of the **Live FM: Fan Monitor**.

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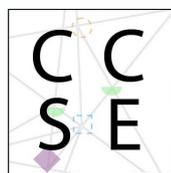
For a copy of this report or more information regarding the project, please contact Prof. Dr. Francisco Tigre Moura at f.tigre-moura@iubh.de or go to the Live FM: Fan Monitor page at [LiveInnovation.org/fanmonitor](https://liveinnovation.org/fanmonitor)

Reference

Tigre Moura, F., Leschik, D., Carnicelli Filho, S., McPherson, G., Reid, E. (2021). Analysis of attitudes and behavioral trends of music fans in Germany and Scotland during the Covid-19 pandemic. Retrieved from Live FM: Fan Monitor project, Germany: <https://liveinnovation.org/fan-monitor>

Acknowledgment

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Educate to inspire.



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Edition

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