EXECUTIVE SUMMARY

AMONG LIVE MUSIC GOERS, WHEN EVENT RESTRICTIONS ARE LIFTED...

**LIVE MUSIC GOERS’ RETURN TO LIVE MUSIC**

- **#1**
  - **91%**
    - Live music will be the most likely attended type of event (91%), outranking movies (87%), theater (78%), and sports (75%).

**CURRENT TICKET HOLDERS’ RETURN TO LIVE MUSIC & TIMING**

- **89%**
  - Of Gen X will be likely to attend live music events (92% Gen Y/Millennials).

- **79%**
  - Of active fans expect to be back at live music events within 4 months.

**VENUE CHANGES**

- **86%**
  - Of active fans desire increased cleanliness and sanitation at venues.

- **85%**
  - Of active fans desire hand sanitizing stations at venues.

**LIVESTREAM BEHAVIORS**

- **72%**
  - Of livestream viewers say watching digitally makes them more excited to attend live music events.

- **85%**
  - Of live music ticket holders still plan on attending their show.

- **85%**
  - Of active fans desire livestreams or videos can’t replace the live music experience.
C1. Think about AFTER the COVID-19 pandemic, once government/health officials deem it safe to do so.

"NET – Live Music Event refers to audience likely to attend either concerts OR music festivals when officials deem it safe to do so.

Live Music Goer (n=5,404).

POST COVID-19 GLOBAL LIVE EVENT ATTENDANCE BY MARKET

91% OF LIVE MUSIC GOERS AROUND THE WORLD ARE CONFIDENT IN THEIR RETURN

Likelihood To Attend Live Music Events* Post Covid-19
Live Music Goers by Market

<table>
<thead>
<tr>
<th>Country</th>
<th>Likelihood to Attend</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>95%</td>
</tr>
<tr>
<td>Mexico</td>
<td>92%</td>
</tr>
<tr>
<td>South Korea</td>
<td>92%</td>
</tr>
<tr>
<td>Germany</td>
<td>91%</td>
</tr>
<tr>
<td>UK</td>
<td>91%</td>
</tr>
<tr>
<td>US</td>
<td>90%</td>
</tr>
<tr>
<td>Australia/NZ</td>
<td>89%</td>
</tr>
<tr>
<td>Italy</td>
<td>87%</td>
</tr>
</tbody>
</table>

*NET – Live Music Event refers to audience likely to attend either concerts OR music festivals when officials deem it safe to do so.
CT: Think about AFTER the COVID-19 pandemic, once government/health officials deem it safe to return to public gatherings. How likely or unlikely are you to attend each of the following types of paid live events/experiences after it is deemed safe to return? Base: Live Music Goer (n=5,404)
FANS OF ALL AGES ARE ANTICIPATING A RETURN TO LIVE MUSIC

Likelihood To Attend Live Music Events Post Covid-19
Live Music Goers by Generation

- **90%**
  - Gen Z

- **92%**
  - Gen Y

- **89%**
  - Gen X (Millennials)

*NET – Live Music Event refers to audience likely to attend either concerts OR music festivals when officials deem it safe to do so.*

*Think about AFTER the COVID-19 pandemic, once government/health officials deem it safe to return to public gatherings. How likely or unlikely are you to attend each of the following types of paid live events/experiences after it is deemed safe to return? Base: Live Music Goer (n=5,404)
POST COVID-19 GLOBAL TICKET HOLDER ATTENDANCE

9 OF 10 TICKET HOLDERS STILL PLAN ON ATTENDING THEIR SHOW

Likelihood To Attend Live Music Events Post Covid-19
Current Live Music Ticket Holders

91%

2020 Live Nation Global Impact of COVID-19 on Live Events Benchmark Study

QCT1: How likely are you to attend this event when it is held assuming the government/health officials deem it is safe to return to public gatherings?
Base: Total Current Ticket Holders Globally = 2,731
POST COVID-19 US ACTIVE FAN LIVE EVENT ATTENDANCE TIMING

79% OF ACTIVE FANS EXPECT TO BE BACK AT LIVE MUSIC EVENTS WITHIN FOUR MONTHS OF COVID-19 RESTRICTIONS LIFTING

This line represents cumulative % of fans who expect to be attending live events within X months of COVID-19 restrictions lifting

% of fans who expect to be attending live events within X months of COVID-19 restrictions lifting

41% 60% 72% 79%

Q. Based on your best guess, when do you think COVID-19 stay-at-home restrictions will no longer be necessary in the US? Base: Active Live Fan (n=6,968)

Q. While we understand that rescheduling an event is uncertain at this time, when will you feel most comfortable in attending events? Base: Active Live Fan (n=6,968)
**POST-COVID US ACTIVE FAN PRECAUTIONS**

**INCREASED CLEANING OF VENUE AND PROVIDING HAND SANITIZER ARE PRECAUTIONS FANS DESIRE MOST**

- **Increased cleaning & sanitizing of venue**: 86%
- **Hand sanitizer stations through venue**: 85%
- **Seating that maintains adequate distance between attendees**: 41%
- **Social distancing requirements at entrance lines**: 39%
- **Closed beverage containers**: 36%
- **Temperature check at entrance**: 32%
- **No general admission (only seated shows)**: 27%
- **Wearing masks is required**: 21%
- **Pre-packaged merchandise**: 18%
- **Only pre-packaged food**: 16%

*Health & Safety Precautions of Fan Interest*

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2020 Ticketmaster US Impact of COVID-19 on Live Events (Active Fan) Benchmark Study

Q: What health and safety precautions will you need to see at events in the future? (Please select all that apply), Base: Active Live Fan (n=6,968)
AMIDST COVID-19 GLOBAL LIVE MUSIC DEPRIVATION ATTITUDES

LIVESTREAMS HELP BUT DON’T REPLACE LIVE MUSIC EVENTS

81% MISS THE EXCITEMENT OF PLANNING A LIVE MUSIC EVENT
72% OF LIVESTREAM VIEWERS SAY WATCHING DIGITALLY MAKES THEM MORE EXCITED TO ATTEND LIVE MUSIC EVENTS
85% OF LIVESTREAM VIEWERS SAY LIVESTREAMS OR VIDEOS CAN’T REPLACE THE LIVE EXPERIENCE

2020 Live Nation Global Impact of COVID-19 on Live Events Benchmark Study
Q2: For each of the following statements about music below, please select to what extent you agree or disagree in relation to your experience with the COVID-19 pandemic. Please select one best option per row.
Base: Live Music Goers: 5,404, Live Music Goer Livestream Viewers: 1,716
METHODOLOGY

GLOBAL GEN POP/LIVE MUSIC GOER STUDY

BENCHMARK / 49 QUESTION SURVEY
- 24–28 Apr: N=9,885 (COMPLETE)
- +/- 1%, with a 95% confidence interval
- Data has been weighted to adjust for country-specific gender and age

TRACKING / 21 QUESTION SURVEY (to be fielded)

KEY AUDIENCES

Live Music Goer  Live Music Ticketholder

DEMOGRAPHICS/PSYCHOGRAPHICS
- Gender: F/M
- Live Event Attendance:
  - Casual Fan: 1–2 paid concerts and/or 1 paid festival P12M
  - Avid Fan: 3+ paid concerts and/or 2+ paid festivals P12M
- Health Impact of Personal Network of COVID-19
- Financial Impact of COVID-19

8 KEY MARKETS
United States: n=1,358
Italy: n=1,196
South Korea: n= 1,382
United Kingdom: n=1,262
Germany: n=1,177
China: n=1,112
Mexico: n=1,131
Australia/New Zealand: n=1,267
BENCHMARK / 67 QUESTION SURVEY
• 10–20 Apr: N=8,037 (COMPLETE)
• +/- 2%, with a 95% confidence interval
• Data has been weighted to adjust for gender, age, and region

TRACKING / 36 QUESTION SURVEY (to be fielded)

KEY AUDIENCES
Active Fan

DEMOGRAPHICS/PSYCHOGRAPHICS
• Age: 18–70 YO’s
• Gender: F/M
• Live Event Attendance:
  • Have purchased tickets to a live event through Ticketmaster P12M
  • Event Category: concerts, festivals, sports, arts & theater, family
• Region/DMA within US