



LIVE NATION® + *ticketmaster*®

COVID-19 IMPACT FROM LIVE MUSIC FANS

PART ONE | 7 MAY 2020

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

LIVE MUSIC GOERS'
RETURN TO LIVE MUSIC

#1

LIVE MUSIC WILL BE THE MOST LIKELY ATTENDED TYPE OF EVENT (91%), OUTRANKING MOVIES (87%), THEATER (78%), AND SPORTS (75%)

89%

OF GEN X WILL BE LIKELY TO ATTEND LIVE MUSIC EVENTS (92% GEN Y/MILLENNIALS)

CURRENT TICKET HOLDERS'
RETURN TO LIVE MUSIC & TIMING

91%

OF LIVE MUSIC TICKET HOLDERS STILL PLAN ON ATTENDING THEIR SHOW

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%

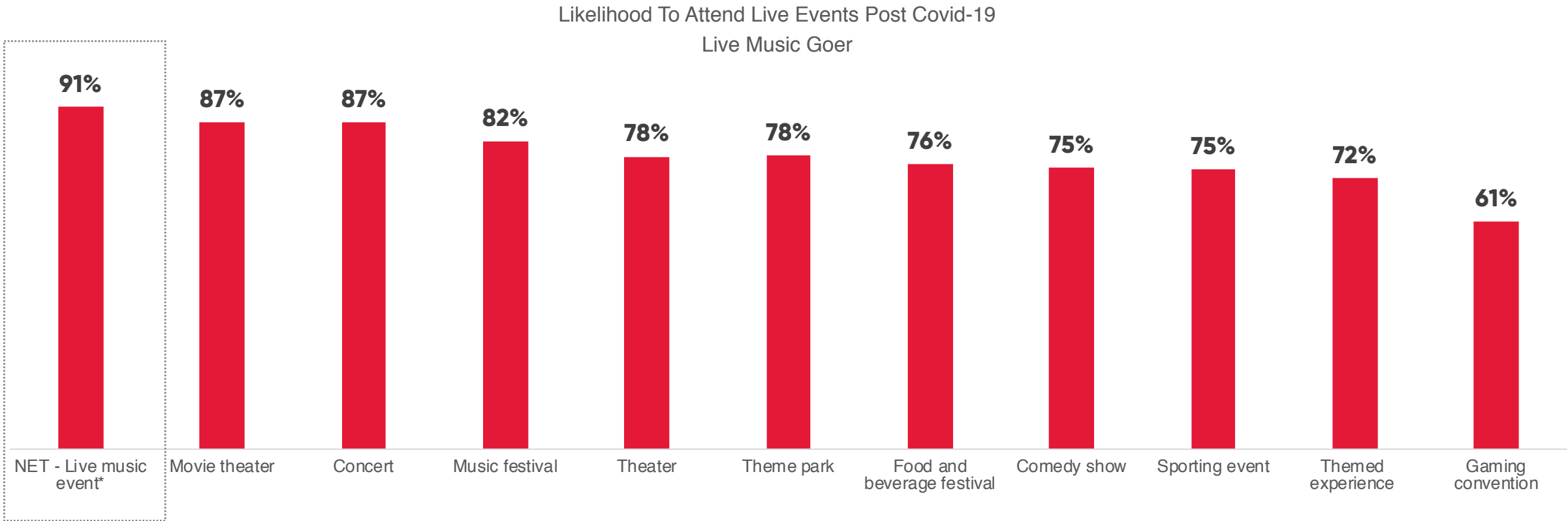
OF LIVESTREAM VIEWERS SAY WATCHING DIGITALLY MAKES THEM MORE EXCITED TO ATTEND LIVE MUSIC EVENTS

85%

OF LIVESTREAM VIEWERS SAY LIVESTREAMS OR VIDEOS CAN'T REPLACE THE LIVE MUSIC EXPERIENCE



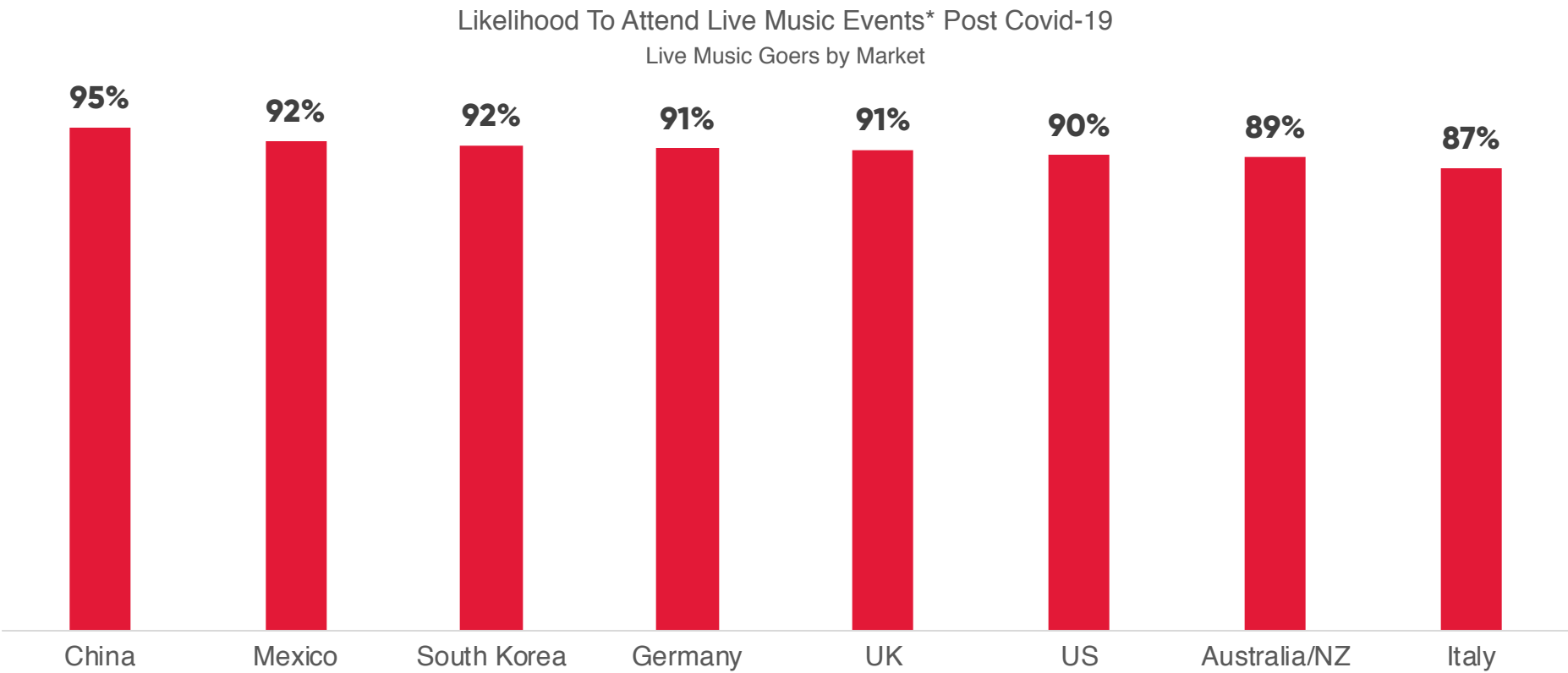
LIVE MUSIC AND MOVIE GOERS MOST LIKELY TO RETURN



2020 Live Nation Global Impact of COVID-19 on Live Events Benchmark Study
*NET – Live Music Event refers to audience likely to attend either concerts OR music festivals when officials deem it safe to do so
C1. 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).



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



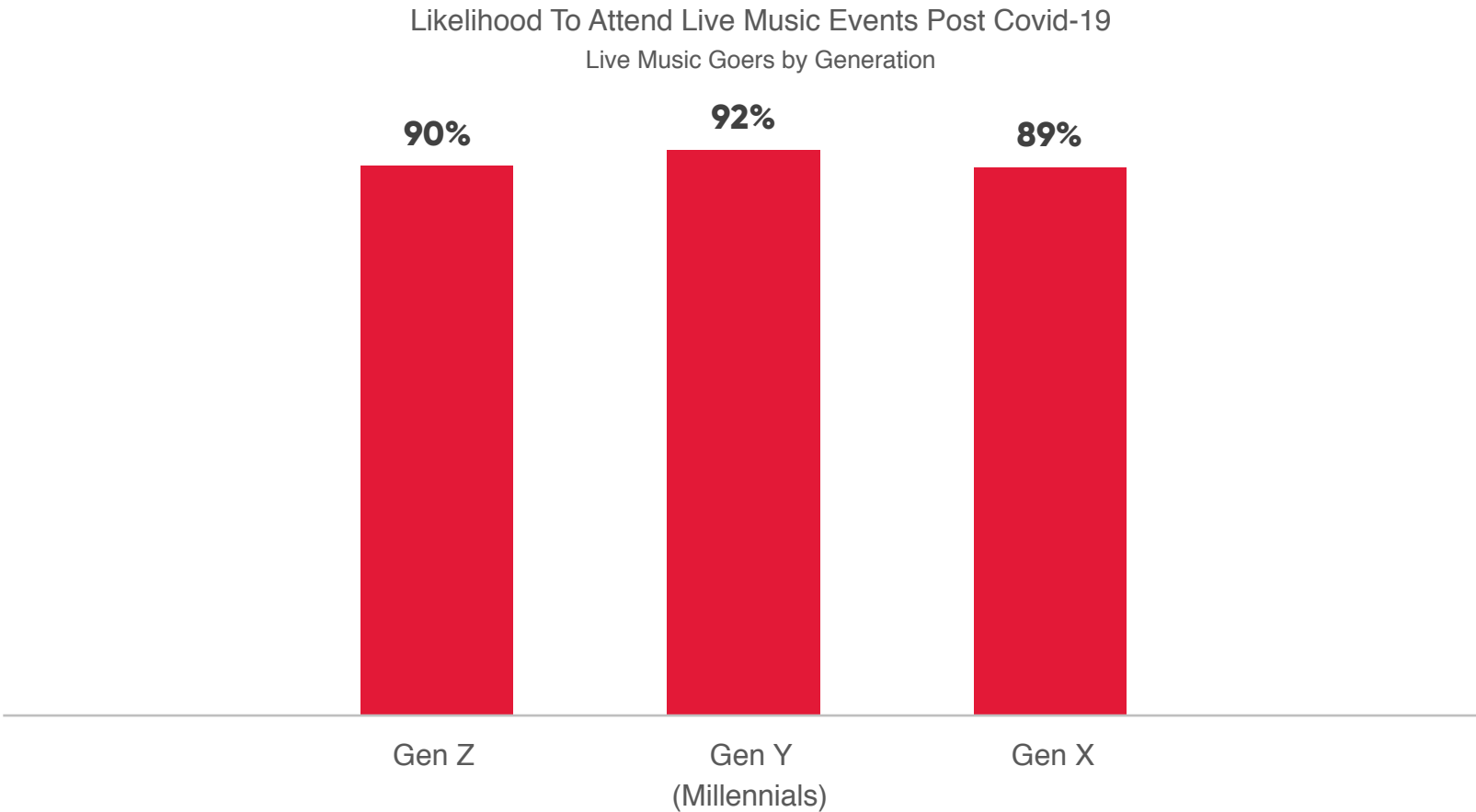
2020 Live Nation Global Impact of COVID-19 on Live Events Benchmark Study

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

C1. 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



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

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

C1. 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)



9 OF 10 TICKET HOLDERS STILL PLAN ON ATTENDING THEIR SHOW

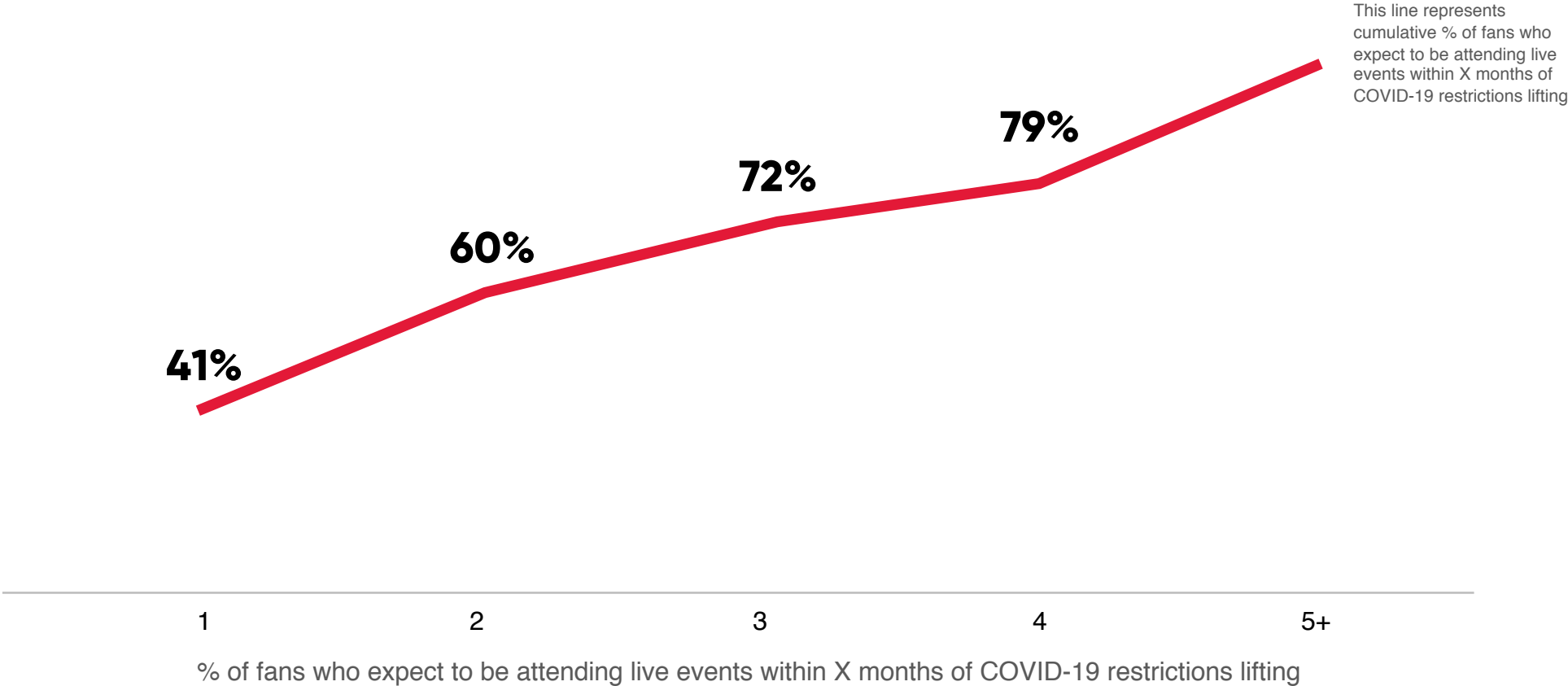
Likelihood To Attend Live Music Events Post Covid-19
Current Live Music Ticket Holders



2020 Live Nation Global Impact of COVID-19 on Live Events Benchmark Study
QC11. 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



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

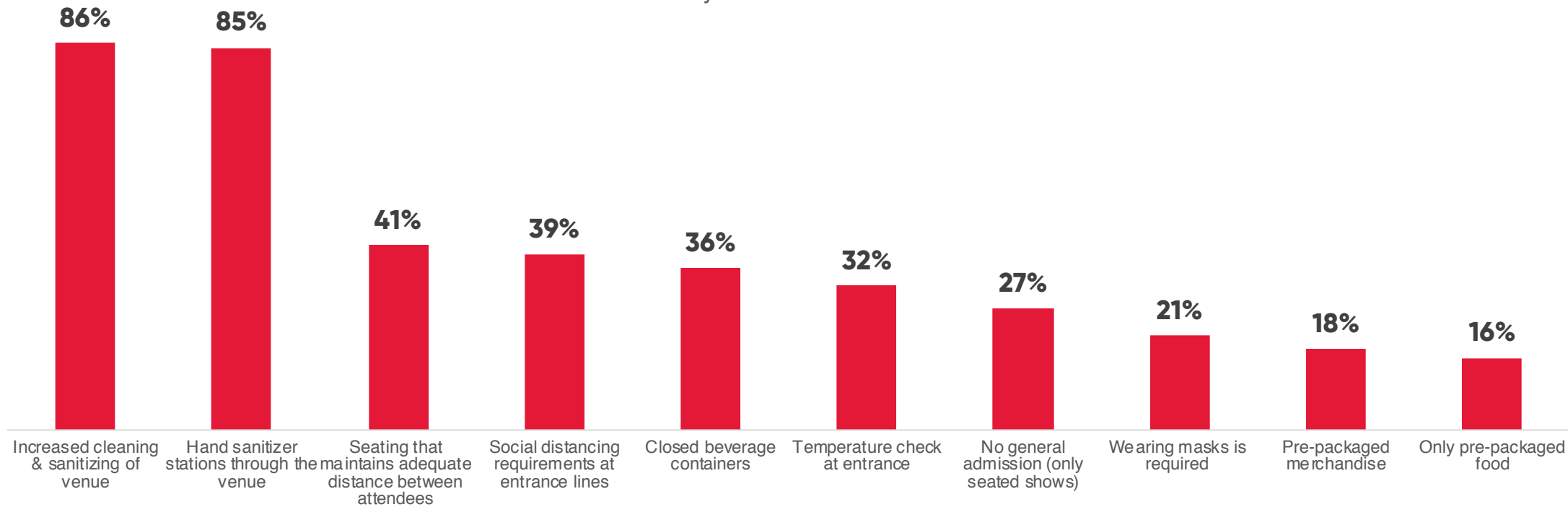


2020 Ticketmaster US Impact of COVID-19 on Live Events (Active Fan) Benchmark Study
Q. Based on your best guess, when do you think COVID-19 stay-at-home restrictions will no longer be necessary in the US? Base: Active Live Fan (n=6,968)
Q. While we understand that rescheduling an event is uncertain at this time, when will you feel most comfortable in attending events? Base: Active Live Fan (n=6,968)



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

Health & Safety Precautions of Fan Interest





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

APPENDIX

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

- Age & Generations: 16-50 YO's (Gen X: 41-50, Millennials: 26-40, Gen Z: 16-25)
- 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

METHODOLOGY

US TICKETMASTER ACTIVE FAN STUDY

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

