

# **Disruption and Continuity: Covid-19, Live Music, and Cyclic Sociality**

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The year 2020 was disastrous for the live music and festivals industries. The previous two decades had seen consistent growth, with the business services provider and analyst PricewaterhouseCoopers confidently predicting that the “boom” would continue at least until 2023 when global live music ticket sales were set to exceed US \$25 billion for the first time (Chapple 2019). In the UK, the trade organization UK Music (2019) reported that the live sector was worth £1.1 billion in 2018, supported over 30,000 jobs, and attracted tourist spending of £4.5 billion, with all these figures having increased on previous years. On March 11, 2020, all of this changed as the World Health Organization (WHO) declared that a novel coronavirus (later named COVID-19) had spread from an initial outbreak in Wuhan, China to achieve pandemic status. State responses to this news varied, but over the course of March and April numerous countries issued stay-at-home orders and/or travel bans to institute national lockdowns. These lockdowns included a ban on mass gatherings, defined by the WHO (2020) as “events that could amplify the transmission of the virus and potentially disrupt the host country’s response capacity.” In most countries, such as the UK, this meant the “shuttering” of all live music venues and festivals of any size, leading to the cancellation of tours, and significant economic hardship for those whose livelihoods depend upon the sector; not just the artists, venue owners, and promoters, but the extended supply network that comprises it (booking agents, sound and lighting technicians and equipment companies,

transportation, road crews, catering, and so on). Promoters and venues initially responded with short term rescheduling of events but as the restrictions extended, many began to offer ticket transfer options (at no additional cost) so that fans could attend concerts and festivals that were being re-scheduled into 2021 and beyond. Where these transfers were accepted, the financial burden on venues and promoters of refunding ticket income was reduced.

An indication of the financial impact of the global lockdown was shown in Live Nation's profit postings. Second quarter profits for 2020 were just \$74 million as compared to \$3.2 billion in the same quarter in 2019 (LNE 2020). Furthermore, the sector saw venues and festivals closing permanently, and job losses worldwide, with major international booking agencies such as Creative Artists Agency, William Morris Endeavor and Paradigm Talent Agency all announcing redundancies. In Europe, Live DMA reported that across 2600 venues in 16 European countries 284,000 events had been cancelled or postponed in 2020, with an estimated loss of 1.2 billion euros (Dee 2020, 1-2). Some of the larger firms had the finances to survive the loss in revenue, but it became very challenging for smaller-scale companies and for the many freelance workers involved in the sector. For instance, in the UK it was estimated that around 72% of those working in music, performing, and visual arts were self-employed (UK Music 2019), while the Association of Independent Festivals reported that its members had average "sunk costs" (non-recoupable) of £375,000 per event and that the majority were not covered by their insurance policies for the effects of a public health crisis (AIF 2020). Similar figures were seen around the world and were exacerbated by the informal employment status of musicians who found it difficult to access government support, even where this was available. At every level, artists, managers, promoters, and others sought to innovate, to develop new revenues streams, and to try out new ways of connecting audiences with music, while also lobbying governments for enhanced financial support. In the UK,

music industry organizations ran campaigns with the hashtags #LetTheMusicPlay, #LetUsDance, #SaveOurVenues, #Savenightlife, #WeMakeEvents, and #SaveOurSummer aimed at securing emergency grants, loans, and other support. This led to the UK government creating a “Cultural Recovery Fund” of £1.57 billion (launched in July 2020) that included an Emergency Grassroots Music Venues Fund; the fund helped over 135 venues to survive in the short term (DCMS 2020). Other countries were quicker to support their cultural industries; for instance, in June, Germany announced a €1 billion aid package for the arts, while New Zealand launched an arts and music recovery package worth NZ\$ 175 million (Hickley 2020; ASEF Culture360 2020). However, without a vaccine, or a significant relaxation of social distancing measures with effective track, trace and testing initiatives, the live music and festivals sector could not return to “business as usual” during 2020, while the emergence of new coronavirus variants in late 2020/early 2021 meant that lockdowns and restrictions continued well into 2021.

In this chapter I examine some of the innovative responses that emerged during 2020, with a focus on socially distanced events, the development of the livestreaming<sup>1</sup> and virtual reality (VR) sector, and the growth of illegal raves. I argue that the latter presage a return in fortunes for the outdoor music festival sector once the Covid-19 restrictions on mass gatherings are over, and place my analysis in relation to what I term “cyclic sociality,” an extension of my prior work into the outdoor music festival sector (Anderton 2019a). Drawing on a range of industry and media reporting, I also discuss how livestreaming is maturing into a parallel industry that is complementary to the venue and event-based live music sector. It should be noted that this chapter was written in early 2021 and by the time it is published circumstances will inevitably have changed. However, it is hoped that it will offer a useful overview of the

early responses, challenges, and opportunities seen within the live music industries during the first twelve months of the crisis.

## **Socially distanced events**

Around the world, stay-at-home orders and lockdowns were accompanied by advice regarding social distancing and the wearing of face masks or face coverings when in public places (such as shops, public transport, and so on). In the UK and Canada, the distance set was 2 meters, though the WHO recommended a distance of at least 1 meter, and there was considerable variation from country to country. When lockdowns and restrictions on gatherings started to ease (between May and August depending on the country), venue owners, promoters, and governments began to consider ways in which live events could be staged in a socially distanced manner. For instance, in July 2020, the musician Frank Turner performed at London's Clapham Grand as part of a government-backed initiative. The venue has an audience capacity of 1,250 people, but by following social distancing guidelines only 200 were allowed access to the show. Similar trials with audiences of between 10 and 20 per cent of capacity also failed to generate enough income to cover their costs, demonstrating that indoor events are unlikely to be viable for most concert venues and clubs (UK Music 2021, 14).

In contrast to indoor venues, outdoor events offered greater potential for socially distanced models. An initial development was the extension of the drive-in cinema, common in the US and Canada, to include either live performances or specially recorded films of live shows. An example of the latter is Encore Live's *Drive-In Nights* series launched in June 2020, which saw films of Garth Brooks, Blake Shelton, Metallica, and others promoted as one-off events

in drive-in cinemas around North America. Similarly, in Denmark and Germany, drive-in raves were staged as early as April and May 2020, with audiences receiving the music via a dedicated radio frequency to their in-car sound systems. In the UK, the picture was more mixed with Live Nation's *Live from the Drive-In* series and the independently run *Drive-In Me Crazy* series both being cancelled due to a change in government policy. The main issue in both cases was that local authorities gained the power to impose local lockdown measures. As a result, Maidstone Borough Council withdrew permission for *Drive-In Me Crazy*, while Live Nation decided it was too risky to proceed with its plans. Despite this, some socially distanced events were staged in the UK and Europe. For instance, a series of concerts was held at the Virgin Money Unity Arena at Newcastle Racecourse, launched by SSD Concerts in August 2020. The site had 500 "personal platforms" (elevated and cordoned-off metal platforms) in socially distanced bubbles of five or six people. Access to the site was via car, with a one-way system directing the audience to their designated platform. Food and drink could be pre-ordered and collected on arrival, or ordered directly to the platform using a dedicated app. An overall audience of 2,500 people helped the venue to be cost effective, though the site itself had a capacity of 20,000 when not complying with social distancing.

Socially distanced events (indoor and outdoor) were at best a temporary measure and were unlikely to be of benefit to live music venues and artists as a sustainable model to be scaled up across the entire industry. For this reason, Melvin Benn (Managing Director of Festival Republic<sup>2</sup>) called for the adoption of what he termed a "Full Capacity Plan" (Benn 2020). Attendees would purchase a ticket and download the NHS<sup>3</sup> contact tracing smartphone app. They would then buy a home testing kit and, following processing, would receive an in-app notification. A negative test result would create a time-limited "authority to enter" that could

be checked at an event's point of entry prior to admission. As he later stated to a UK government hearing in September (quoted by Hanley 2020):

Plan A is a vaccine, and a vaccine would be terrific if we had that but we don't know for definite whether we [will] get it. Plan B which is an absolute certainty is to test everybody and allow everybody who is clear of the virus to enter the venue and work at the venue – and those that are carrying the virus are not allowed to enter.

At the time of writing this chapter, the plan had yet to be piloted, yet the main issues with the plan were clear: it was predicated on the existence of a fully functional track and trace system aligned with rapid Coronavirus testing, and both were subject to considerable uncertainty. Testing (and results) would, ideally, need to be completed within 24 hours of the event itself, yet testing facilities were struggling to meet demand and turnaround times, with results often taking much longer. In addition, regionally based outbreaks and restrictions were unpredictable, which placed further strain on the system, and led to testing centers limiting access to emergency services and healthcare staff and those people showing symptoms. The system would also need to be streamlined considerably for it to be of benefit to smaller and grassroots venues that lack the financial resources of the major promoters<sup>4</sup>.

Even if the 'Full Capacity Plan' was enacted in the UK, there were no guarantees that a local or national lockdown would not be reinstated, that the social distancing guidelines would not be amended, or that the rules and strategies adopted in the UK would match those adopted in other countries. In the UK, there were also issues regarding event insurance for the festival sector, as insurance companies were not providing cover for disruption caused by Covid-19, and the UK government opted not to extend to music festivals the support it had given to the

film and television industries—support that was available to festival promoters in other countries such as Germany and Austria (UK Music 2021, 25). Dealing with each countries' differing guidelines and rules would also add time and expense to a tour budget, yet promoters were, understandably, seeking to reduce the fees they paid out to artists because of lost revenue during the lockdown, and because of the additional expenses involved in managing socially distanced events or those that could make use of the testing regime. As a result, international touring acts would not find it cost-effective to arrange tours or to deal with the regional variations found from one country to the next. For these (and other) reasons, international tours, and festivals reliant on international acts continued to be postponed until 2021 and 2022.

### **Livestreaming and virtual reality (VR)**

In the early days of the global lockdown videos appeared on social media and on television news bulletins showing people singing from their balconies in Italy and using video apps to bring musicians and singers together to create music through the virtual space of the Internet. Professional and amateur musicians performed live on social media, entertaining and supporting their fans, even as their concerts and gigs were cancelled. Television events such as *One World: Together at Home* (broadcast on April 18) brought music from the stars into listener's homes around the world, and there was an optimistic feeling that the lockdown would lift and things would soon go back to normal. As the weeks and months of the pandemic dragged on, it was increasingly clear that the “new normal” of social distancing, face masks, and so on was becoming a long-term proposition, leading musicians, music managers, and promoters to seek new revenue streams that could help to sustain them while the “bricks and mortar” live music industries were closed (see also Vandenberg et al. 2020).

Several responses were seen. For instance, those artists who had archives of recorded material began to release those archives through Direct-to-Fan (D2F) websites such as Bandcamp. Alongside this, many artists offered livestreamed gigs on platforms such as YouTube, Instagram, and Facebook alongside “virtual tip-jars” (sometimes raising money for charities), thus accelerating a slow-burning trend towards the livestreamed gig model that has its roots in the mid-2000s (Daman Thomas 2020, 83). Others hosted listening parties, online quizzes, DJ sets, and other activities that enhanced their connection with their audiences and pointed viewers toward their websites in the hope of attracting download and merchandise purchases. However, as the Covid-19 lockdown extended, it became clear that livestreaming would need to be monetized beyond the “virtual tip jars,” advertising revenue, and cross-marketing associated with the free model of livestreaming.

Pay-per-view (PPV) or “ticketed livestreaming” soon emerged as a viable option available not only for artists at the superstar level, but across the spectrum of music-making. Two principal models emerged. The first involves pre-recording a live performance and then later broadcasting it as a time-limited livestream. A good example of this is Nick Cave’s performance recorded at the Alexandra Palace in London in August 2020. By pre-recording a concert, the artist can take more time in editing and enhancing the presentation of the video, and they may also be willing to contribute personally to concurrent and/or post-event message boards or video chats. Pre-event message boards and video chat rooms typically open at least half an hour prior to the livestream so that the audience can talk to each other, helping to build anticipation and excitement for the event to come. In this way, the livestream apes the experience of a bricks and mortar gig where the doors open prior to the scheduled performance time, with friends meeting and chatting together.<sup>5</sup> Livestreamed concerts also



allow artists to play different set-lists, bring in guest musicians, or amend the staging of their concerts from livestream to livestream, thus giving their audiences more reason to attend more than one show.<sup>6</sup> The second model involves real-time live performance, which may also be geo-blocked and scheduled for particular time zones.<sup>7</sup> Additional live performances may be scheduled for other time zones so that particular live music markets can be more directly catered to. An example of this is Laura Marling, who livestreamed a concert from London's Union Chapel in June 2020 for a UK audience and then performed another concert later that same day for a US audience.

The use of PPV and geo-blocking not only extends the livestreaming ecology to incorporate other music and media sectors, but also helps to create a sense of scarcity. For this reason, the stream should be taken down after the show is over: if you missed it, you missed out. This can be further enhanced by using fan forums to promote "early bird" discounts (fostering a sense of community and specialness), by selling bespoke bundles, merchandise, and collectibles, or by offering VIP benefits such as access to post-event "meet and greets." Some artists will archive the livestreamed gigs for rental, streaming or download in much the same way as bands such as Metallica, Pearl Jam, and others have done in the past with their "official bootleg" offerings. This provides an extended revenue stream for the artist, with the recording acting either as a souvenir for someone who attended the livestream, or as a way for those unable to attend the show to have access to it.

The emergent PPV market rapidly demonstrated its worth. For instance, it was widely reported that the K-Pop band BTS achieved an equivalent of over US \$20 million in ticket sales for its *Bang Bang Con: The Live* event held on June 14, which was viewed by a worldwide audience (in over 100 countries) and reached a concurrent peak viewership figure

of over 756,000 connections (Frater 2020). In Europe, Dermot Kennedy's *Some Summer Night* performance at London's Natural History Museum on July 30 attracted over 30,000 paid tickets, making it the biggest livestreamed PPV concert in the US and Europe at that time (Johnston 2020). PPV livestreams are often staged in iconic venues or unusual spaces that are not typically associated with live music performance, such as recording studios and museums. For instance, Ellie Goulding's *The Brightest Blue Experience* was filmed at London's V&A (Victoria & Albert) Museum. In this sense, they are an extension of the Sofar Sounds model discussed by Loïc Riom in **Chapter 15** of this book. Unlike Sofar Sounds, these concerts are open to as many people as are willing to buy a ticket, yet with close-up filming and careful staging, they may create seemingly intimate experiences, as the artist appears to perform to each and every viewer as if they were the only one. Higher quality staging, multiple camera angles, and quality post-production is more likely to be delivered by artists with higher budgets (and subsequently higher ticket prices), but livestreaming technology is cheap and simple enough to be available and beneficial for artists at all levels.

One of the problems that faced the thousands of artists making livestreams available online was how to connect with viewers in the absence of a dominant platform to host the streams, or one to collate listings for events worldwide. Several ticketing platforms began to list ticketed livestreams, such as Ticketmaster, Songkick, JamBase, Bandsintown, and Dice, but all too often artists found themselves playing primarily to their existing fans. In order to develop and broaden the livestream sector, new and existing companies began to innovate. For example, the independent music specialist eMusic.com, which began as a subscription download sales platform before morphing into a hybrid download/streaming site, created eMusic Live in collaboration with the digital music distributor 7Digital. This livestreaming platform allows artists to create fully customizable digital storefronts to promote and sell their music releases

and merchandise, embed their livestreams (either directly through eMusic Live or from other video hosting sites), and sell PPV tickets directly to their fans. Artist livestreams are promoted by the platform, which also offers access to detailed analytics. Other new entrants into the PPV livestreaming market are Driift and LiveNow. Driift, created by the music managers Brian Message and Ric Salmon, was responsible for the Laura Marling and Dermot Kennedy concerts mentioned earlier, and focuses principally on the livestreaming of music events. In contrast, LiveNow, responsible for the Ellie Goulding livestream noted above, has a broader programming remit, as it also offers livestreams of sporting events, fitness classes, and other entertainment. Over time, many other companies have entered the livestream market as suppliers, merchandisers, or hosts, including concert promoters, media and PR companies, social media platforms, and record companies, though no one model has yet achieved ascendancy.

Livestreams compete for attention with audio streaming services (such as Spotify, Apple Music, and so on), so a further development was the announcement of deals that bring the two sectors together—deals which also brought virtual reality (VR) applications into the equation. VR applications offer immersive digitally created environments that allow users to create avatars in a multi-user environment, to interact with each other through those avatars, and to choose from a variety of camera angles. These can give close-up views of performers and give a sense of being onstage with them while they perform. Examples of deals that bring together these technologies include TIDAL's investment in Sensorium Corporation (whose Sensorium Galaxy offers VR music and entertainment concerts), the purchase of Napster by MelodyVR (which also has deals with Live Nation, Universal Music Group and others), the creation of Sony's Immersive Music Studios (working with PlayStation VR and Oculus VR), and Amazon Music's addition of livestreaming capabilities to its primary app through the

integration of its video game streaming site Twitch.<sup>8</sup> The connection with video gaming is important, as those creating livestreaming experiences need to ensure that viewers maintain engagement with the stream and come back for others, and gamification, with discount incentives, targets, and interactivity that encourage viewers to stay involved, is one method of doing so. This is, however, an area that is still in its infancy within live music streaming, though it has long been a mainstay of video game platforms.

VR applications related to live music are especially interesting as they were at an early stage of market development at the beginning of the global pandemic but saw a degree of acceleration as the lockdown extended and people sought out new activities to keep them occupied. MelodyVR and Sensorium established Covid-19 secure studios to record concerts and other audio-visual content, and partnered with labels, publishers, games developers, and venues around the world. Both companies focused primarily on electronic music and hip hop, as these genres have substantial crossover appeal to the global video gaming community; a community that is more used to the headset technologies required to make the most of VR systems.<sup>9</sup> In July 2020, MelodyVR partnered with Festival Republic's *Wireless Connect* festival (which focuses on rap, hip hop, and R&B) to provide a 360° virtual festival, and to help market their VR technology. MelodyVR used their own studio based in Los Angeles (for American artists), and the Alexandra Palace in London to record three days of performances that were broadcast through its own platform as well as on YouTube. However, immersive online experiences do not necessarily require VR, as demonstrated by *Tomorrowland Around the World*, a virtual version of the popular electronic music festival. In this case, a virtual festival site was created online using 3D design, which incorporated eight stages, firework displays, laser shows, and a range of interactive activities. Nevertheless, as with livestreaming in general, events in VR cannot replicate the underlying social experience of attending a

festival: the excitement of being co-present with others in close physical proximity, of watching performances in the open air, and so on. Nevertheless, the developments seen in livestreaming and VR are rapidly expanding into a parallel industry, as they offer a compelling alternative that does not directly compete with the traditional live music industry, but offer further ways to engage with live music, including the provision of digital merchandise and customizable avatars for use within VR applications.

### **Illegal raves, music festivals, and cyclic sociality**

In its planning recommendations for mass gatherings, the WTO (2020) noted that events have “important implications on the psychological well-being of large numbers of individuals” and that they have “substantial political, cultural, social and economic implications.” I would like to focus briefly on the social implications in relation to live music events, because these events are more than simply economic transactions affecting the livelihoods of artists, promoters, venues, and the supply chains that support them. Socially distanced events (as well as livestreaming more generally as discussed above) are grounded on what might be called the “concert model” of the live music industry, where the motivation to attend is, according to Dave Laing (2004, 7), largely based on seeing and experiencing a particular act. I would argue that the concert experience is broader than Laing suggested, as evidenced by pre-concert fan meets, post-concert after-parties, and the prevalence of social media postings both during and after events (livestreams, films, photos, selfies, and so on). The 2017 UK Live Music Census demonstrated that spending time with friends, making new acquaintances, and sharing experiences with others were key motivations for British concert attendees (Webster et al. 2018, 28). These are also key motivators for music festival attendance, yet the music festival experience offers much more than this: numerous stages, retail areas, campsites,

catering concessions offering food from around the world, and sponsored enclosures that reach far beyond the music on offer (AIF 2018; Anderton 2019a). Festivals seek to foster an atmosphere of freedom and excess that makes them qualitatively different to a concert experience, and it is difficult to see how socially distanced and livestreamed events can meet the same expectations and needs of the music festival experience as it has developed over the last 60 years.

This is perhaps best demonstrated by a resurgence in the illegal rave sector when strict lockdown measures began to be relaxed in Europe during May and June 2020 (Holden and Waldersee 2020). These ranged from relatively small and informal street parties and house parties, to beach raves, warehouse parties, and forest parties attracting thousands of people and organized on a commercial (though unlicensed) basis. The commercial events were promoted through social media and messaging apps, where attendees would sign up and pay for a ticket using a bitcoin system that would then provide them with travel instructions on the night of the event; in effect an updated version of the premium tariff phone lines that the illegal raves of the 1980s and 1990s had operated through. In the UK, as elsewhere in Europe, the police struggled to deal with the sheer numbers of events that were being held; in London alone, there were as many as 200 events reported on some weekends during July and August 2020 (UK Home Office 2020). It is tempting to view these “quarantine raves” as a rebellion against the lockdown, or as young people protesting against authority and the establishment in general, which connects ideologically and socially to the rave and free party rhetoric of the past (Anderton 2019a: 16–19). They may, therefore, be likened to Hakim Bey’s notion of the Temporary Autonomous Zone—an anarchic, ephemeral, and mobile site of transgression that constantly shifts location (Bey 1991). However, as Michael Kill, CEO of the UK Night Time Industries Association told BBC Radio 4, illegal raves grew mostly because youngsters were

“socially starved” during the lockdown and wanted a release from the restrictions imposed on them (quoted by Sales 2020). This was echoed by the Berlin-based DJ Elias Doré who felt that “people are just longing to socially connect” at the height of what would have been the European festival season (quoted by Holden and Waldersee 2020).

The hedonistic freedoms and social experience of the festival sector are, as shown by numerous studies, the primary motivational factors for attendance, though they are by no means the only ones (Webster and McKay 2016; Anderton 2019a). For instance, while my research into UK music festivals found that “freedom from everyday life” and “socializing” were two of the primary reasons to attend a festival (Anderton 2019a: 136–8, 143–5), the “search for authentic experience” and “transcendence of the self” were also important (138–43, 146–8). Furthermore, “socializing” extended, for annually occurring events, into a “sense of belonging” associated with the event, its location, and with other regular attendees. It is this sense of belonging that underpins what I refer to here as “cyclic sociality,” a concept that extends upon that of “cyclic place” which I introduced in my book *Music Festivals in the UK. Beyond the Carnavalesque* (Anderton 2019a). A cyclic place may be described as a space used in “an ephemeral yet recurring manner”; one that is typically (re)constructed on an annual basis by a network of organizers, mediators (magazines, websites, and broadcast media) and festivalgoers who not only co-create the physical presence of events, but also the communally held meanings and experiences that become attached to them (2019a, 125). Festivals that are held over many years develop a coherent “sense of place” (Relph 1976) and returning to such events/places can be a form of homecoming and pilgrimage for regular attendees: “for those few days of its annual existence it is every bit as “real” as any other place a person might visit on an occasional basis” (Anderton 2019a: 126). Yet, it is also one that is imbued with personal meaning—a spatial identification with the event and its host location that may help

to develop brand loyalty and encourage regular attendance. Festivals become part of how people think about themselves, and the activities and memories of a festival become part of their collective experience, as festivals “develop their own histories, behaviors, landmarks, rules and policing” (126). This is what I term as an event’s cyclic sociality – the social meanings, mediations, and performativities that come to define the meaning and social atmosphere of an event through their regular renewal on-site, and through informal conversations on social media and between groups of friends. This cyclic sociality may be associated with hedonistic activity such as drug use, or with hedonic consumption practices “that relate to the multi-sensory, fantasy and emotive aspects of one’s experience with products” (Hirschman and Holbrook 1982, 92). Contemporary festivals may therefore offer a commercialized form of what Mikhail Bakhtin (1984) termed the carnivalesque: a temporary liberation from the rules of everyday social life in which the world is turned inside out for a limited period and social tensions are released (Anderton 2019a, 19–23). Ultimately, the resurgence of illegal raves may be regarded as indicative of a social need for pleasurable collective experiences that are life-affirming, exciting, and part of who we think we are (see also Ehrenreich 2006). They show that the demand for live music events such as festivals did not wane during the lockdown, despite the growth of livestreaming, VR, and other online entertainments, but instead laid dormant. This may explain why so many people accepted the offer from festival organizers to honor their existing tickets for rescheduled events in 2021, and why festivals saw their “early bird” tickets for 2021 selling out months in advance.

## **Conclusion**

The live music sector suffered considerably in 2020, and at the time of writing, it seemed certain that many festivals and venues would likely close for good, leading to knock-on



effects for the staff who worked for them and the supply chains that supported them. This was a particular issue in the UK where grassroots venues were already struggling to achieve financial sustainability. Socially distanced events failed to deliver the kinds of social experience that live music audiences craved and were largely impractical or loss-making exercises.

From December 2020 newly developed vaccines gained regulatory approval around the world, with mass vaccination programs soon beginning for health workers and the most vulnerable populations. This was a positive sign for the live music industries, yet with some concerts and tours already postponed to 2022 the sector could not recover to its previous level and form during 2021. As suggested above, the festival sector will likely prove to be more flexible in its ability to adapt to changing circumstances, and will find an audience ready to return to the fields when it is safe to do so.<sup>10</sup> However, in the UK, the lack of insurance cover for coronavirus-related disruptions (or of government support to ameliorate the issue) led to further postponements into 2022, since the financial costs of cancellation were too significant for many festival organizers to accept the risk.

In contrast, livestreaming (including VR) has developed into an important income stream and marketing tool for many artists, and it is likely that it will continue to grow as a sector. One of the benefits of livestreaming has been fan engagement, and while Daniel Ek's comment that artists "can't record music once every three to four years and think that's going to be enough" may have attracted condemnation by many artists (Laing 2020), the disruption to the traditional album/tour promotional cycle suggests that artists may need to re-think their approach. Livestreaming fills a void just as well as artist-led podcasts, social media interaction, and so on, but can also provide a ready stream of revenue. Several models have

emerged, but the PPV pre-recorded time-limited stream might well offer the best outcome: a less risky option that allows for higher production values and for social interaction with listeners in real-time. Such a model is attractive for artists (especially “heritage” acts) and promoters, as they can achieve a worldwide audience with considerably less financial risk than traditional touring, hence potentially higher rates of return. At the time of writing, no dedicated livestreaming platforms have gained significant market share, with live concerts and festivals appearing on a range of video platforms (such as Vimeo, VenewLive, and Mandolin) and social media and gaming applications (including Facebook, Instagram, YouTube, and Twitch). Integration with digital music service providers such as Spotify, Apple Music and Deezer could also prove beneficial, as the livestreaming of concerts and festivals adds an element of scarcity that such providers typically lack (as their recorded music catalogues are largely similar). Exclusive deals and cross marketing could therefore be highly beneficial for these various platforms and help to drive both artist discovery and awareness of livestreaming events. Unfortunately, the existing hierarchy and inequality seen in the live music sector in the past is likely to be replicated within the livestreaming sphere: artists that have greater financial and promotional support from record labels and sponsors will be able to afford higher quality productions, better marketing, and charge more lucrative ticket prices as a result.

This review of the live music sector’s early responses to the Covid-19 pandemic suggests that there are always risk-oriented promoters and entrepreneurs looking to enter the market and develop new and innovative opportunities (see also Anderton 2019b), and that the sector as a whole is adapting to the potential benefits afforded by digital technologies in ways that it has not previously done. The pent-up demand for live performance in real world venues offers hope for the future, though such shows and events are likely to become increasingly linked to

online opportunities and creative collaborations, thus opening a new chapter in the history of the live music industries.

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<sup>1</sup> Throughout this chapter I use the term “livestreaming” to refer to the online video streaming of live music performances (whether live or pre-recorded).

<sup>2</sup> Festival Republic is a leading festival promoter in the UK which has Reading/Leeds, Download, Wireless, Latitude, and others on its roster.

<sup>3</sup> The National Health Service (NHS) is the UK’s publicly funded health service provider.

<sup>4</sup> Primavera Sound Barcelona successfully piloted a similar testing scheme based on same-day antigen tests and mandatory mask-wearing, yet with fewer than 500 attendees (compared to



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its usual capacity of 50,000), it was not financially viable. However, the audience was able to attend without social distancing, and demonstrates the potential for scaling up such schemes in the future (Access All Areas 2021, 6).

<sup>5</sup> Vandenberg et al. (2020) found that concurrent chat channels helped to build feelings of social solidarity and resilience in the electronic music livestream audiences that they examined.

<sup>6</sup> The variations possible in live performance enhance feelings of novelty and specialness, something which helps to drive concert attendance in general (Black et al. 2007; Brown and Knox 2017) yet it can be extended to the more flexible space of the virtual concert—a format that is freed from the logistics of the typical touring model, where the show may include tightly controlled and pre-programmed lighting, staging, and other constraints.

<sup>7</sup> Geo-blocking means that only internet users from specific countries/regions can access the livestream. Geo-blocking and time-zoned broadcasting can also be found in pre-recorded concerts where the aim is the same—to make the show available at a time that is suitable for the intended audience.

<sup>8</sup> Amazon bought Twitch in 2014, and while it is best known for streaming live video gameplay, it has since become popular for livestream performances and, more controversially, for the unlicensed delivery of audio streams.

<sup>9</sup> For instance, the video game Fortnite hosted short concerts by the electronic music DJ Marshmello in February 2019, and by the rapper Travis Scott in April 2020, each of which achieved over 10 million concurrent views within Fortnite alone (plus additional streams on platforms such as YouTube and Twitch).

<sup>10</sup> This was further demonstrated by the speed at which tickets sold out for both Creamfields and the Reading and Leeds Festivals following the UK government’s announcement of a one-way “roadmap” out of lockdown in February 2021.