

COVID-19 IMPACT STUDY ON LIVE MUSIC EVENTS

MAY 2020

**A SURVEY OF 2,500 CANADIANS
CONDUCTED FOR MUSIC CANADA**

music
CANADA



**WHAT'S THE
NEW NORMAL?**

ABACUS DATA



HOW ARE CANADIANS FEELING/THINKING ABOUT ALL THIS?

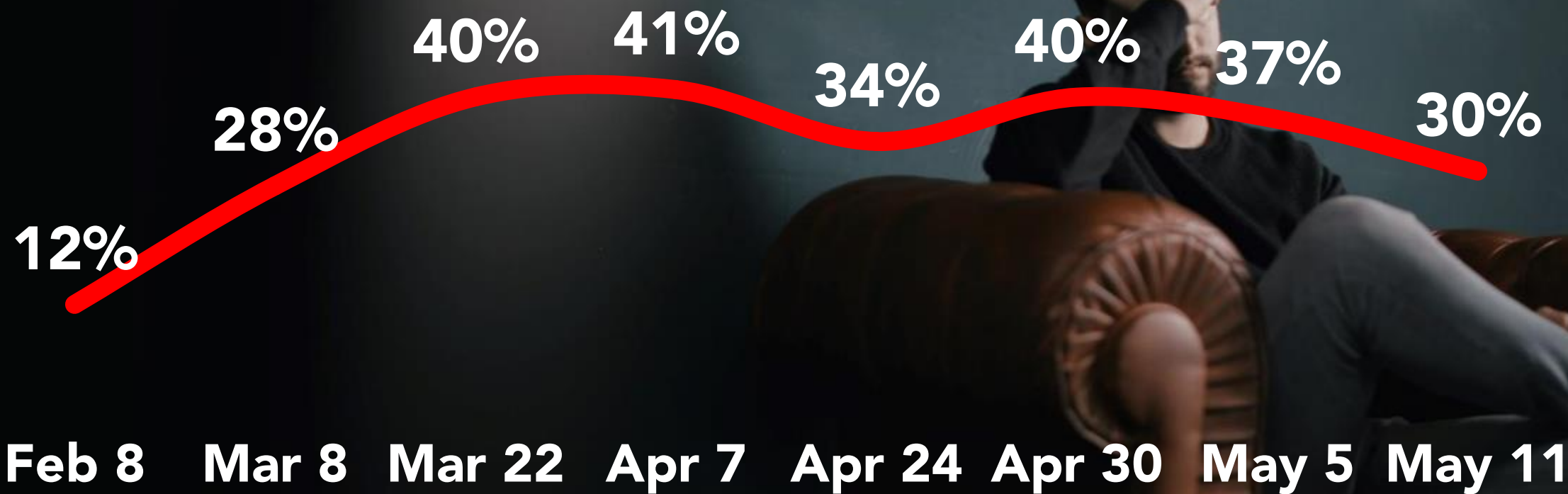


WHAT'S THE
NEW NORMAL?



FLATTENING OF THE "WORRY" CURVE

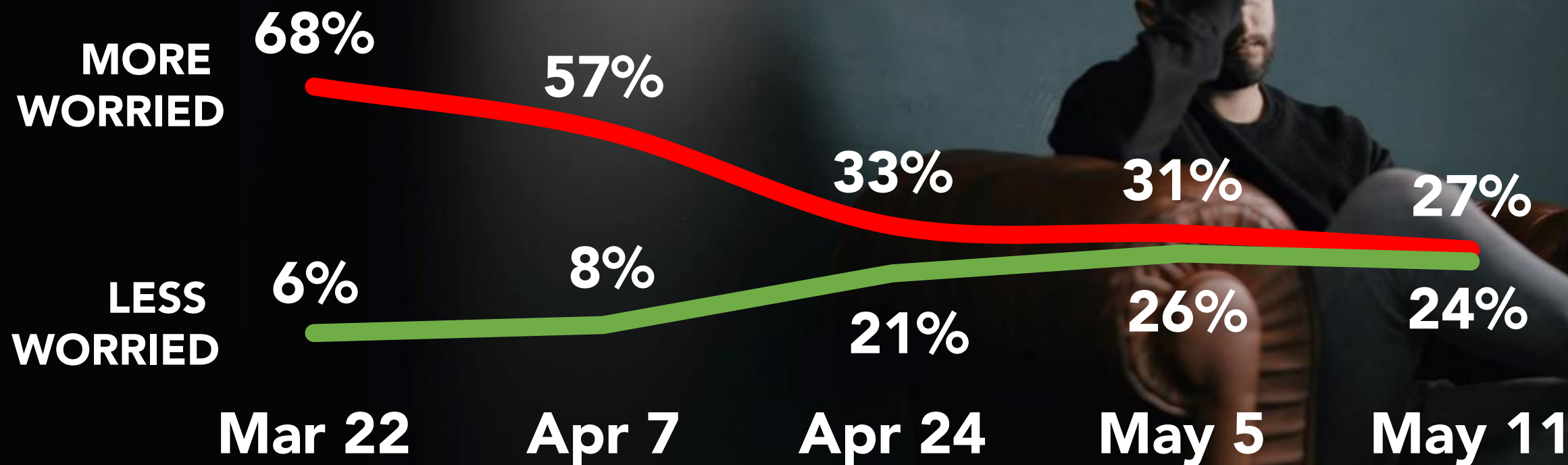
% who say they are extremely/worried a lot



WHAT'S THE
NEW NORMAL?

ABACUS DATA

ARE WE BECOMING MORE OR LESS WORRIED?



WHAT'S THE
NEW NORMAL?

ABACUS DATA

WORRY

**CANADIANS REALLY OR
SOMEWHAT WORRIED
ABOUT A 2ND SPIKE IN
COVID-19 INFECTIONS**

69%

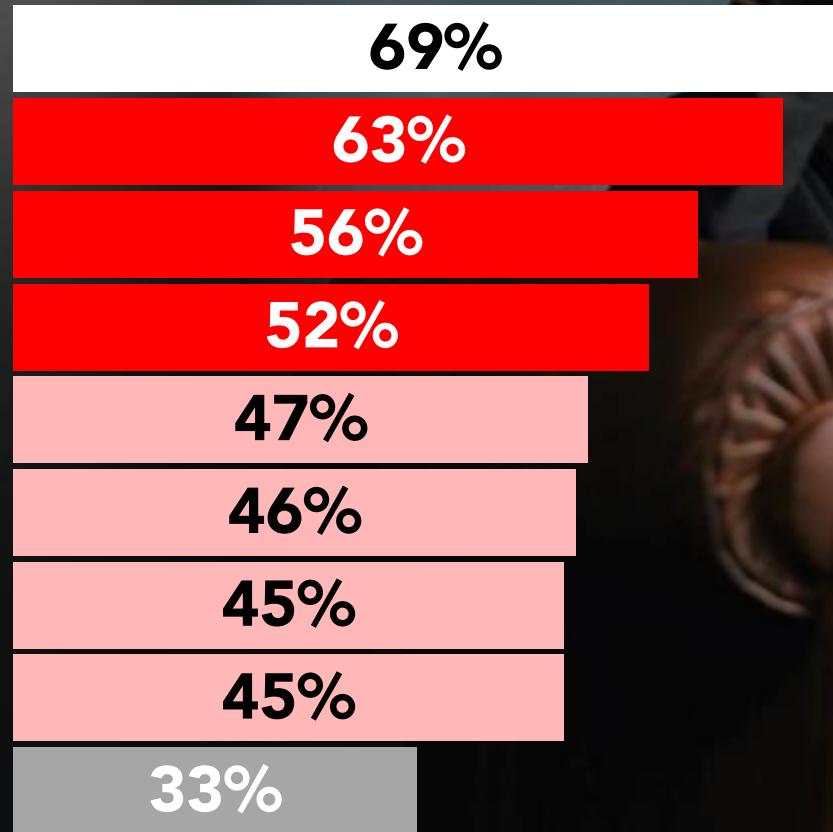


WHAT'S THE
NEW NORMAL?

ABACUS DATA

WHAT ARE PEOPLE WORRIED ABOUT?

A 2nd spike
Deficit/public debt
Family member getting COVID
Not enough medical equipment
Not enough hospital beds
Social unrest
Getting COVID yourself
Long-term financial situation
Not being able to pay bills



% WHO SAY THEY ARE REALLY OR SOMEWHAT WORRIED

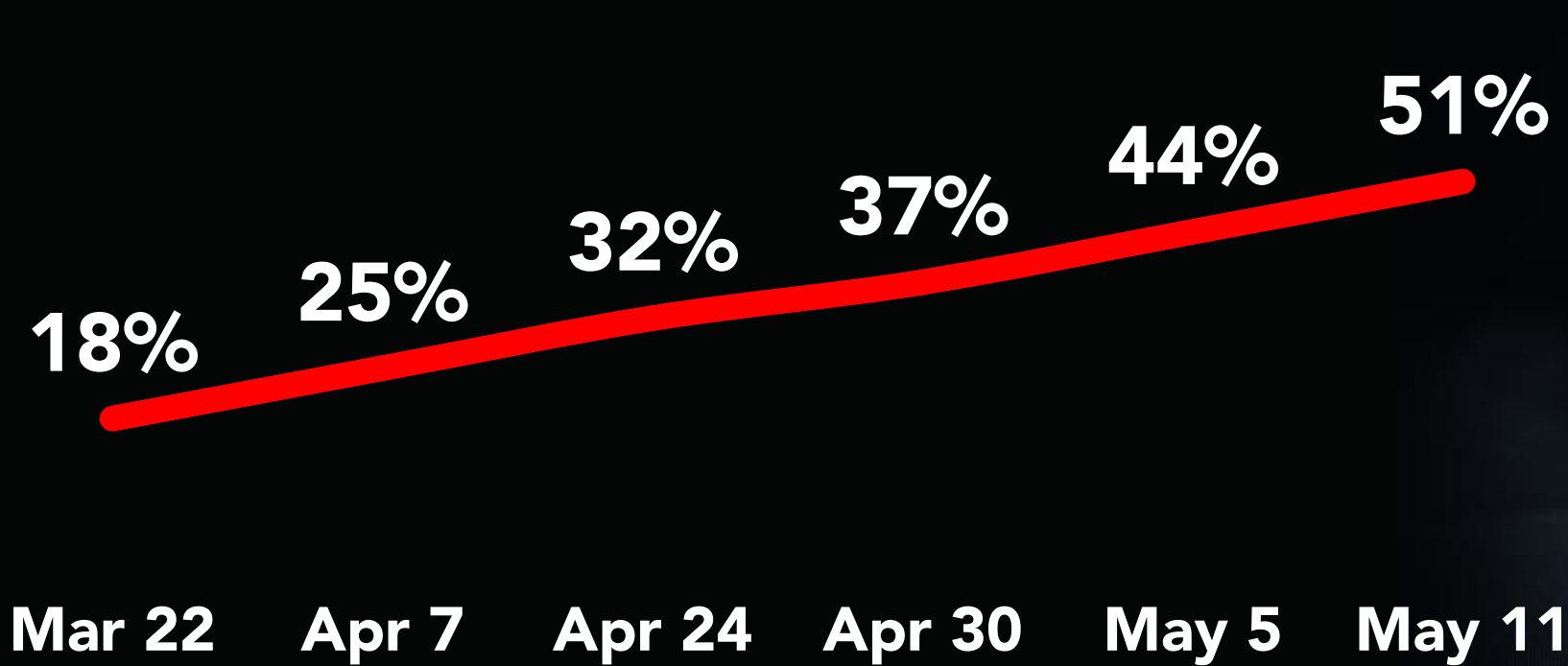


WHAT'S THE
NEW NORMAL?

ABACUS DATA

WHEN WILL NORMAL RETURN?

% who say it will take **6 months or more** to get back to life more or less as before



WHAT'S THE
NEW NORMAL?

ABACUS DATA

STUDY FOR MUSIC CANADA

SURVEY METHODOLOGY

- **ONLINE SURVEY OF 2,500 CANADIAN ADULTS.**
- **APRIL 24 TO 30, 2020.**
- **REPRESENTATIVE OF CANADIAN POPULATION BY AGE, GENDER, LANGUAGE, REGION, AND EDUCATIONAL ATTAINMENT.**
- **MARGIN OF ERROR: $\pm 2.0\%$, 19 TIMES OUT OF 20**



ALMOST ALL CANADIANS HAVE AN APPRECIATION FOR MUSIC



55%
LOVE IT



36%
LIKE IT





MUSIC AND THE PANDEMIC

CHANGE IN BEHAVIOUR LEADING TO...

Watching more video content
from musicians online

31%

Listening to more music

35%

Watching more music videos

31%

Watching more recorded live
concerts

24%



POSITIVE IMPACTS

Listening to music is a way
to relieve stress

78%

They discovered new artists
during the pandemic

43%

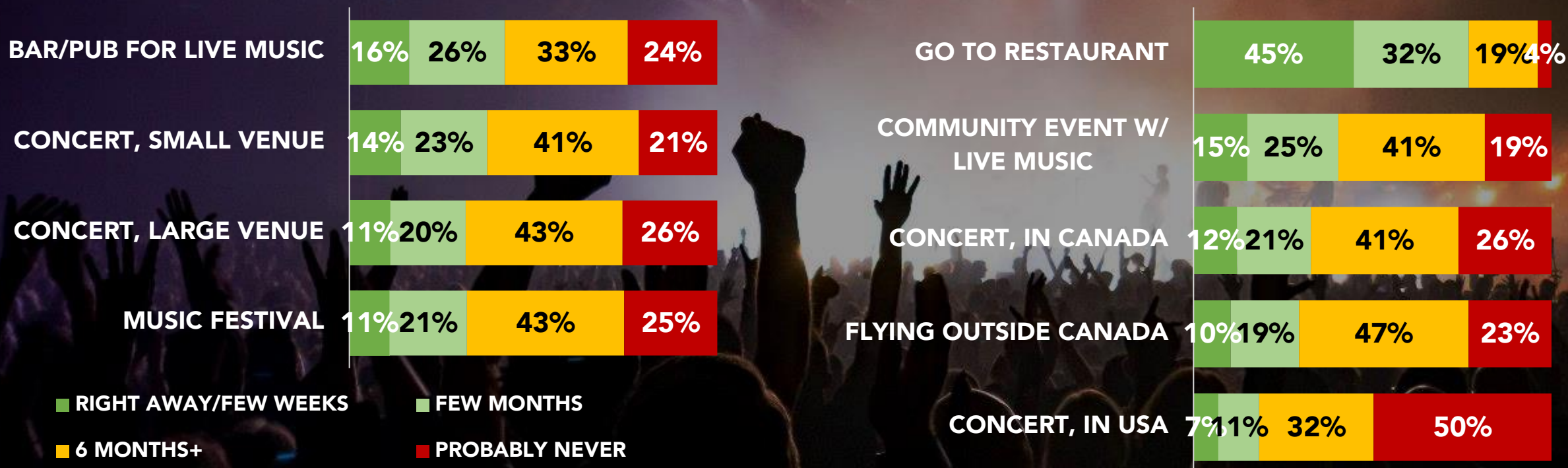
They found a ton new
content online about music
& musicians they love

55%



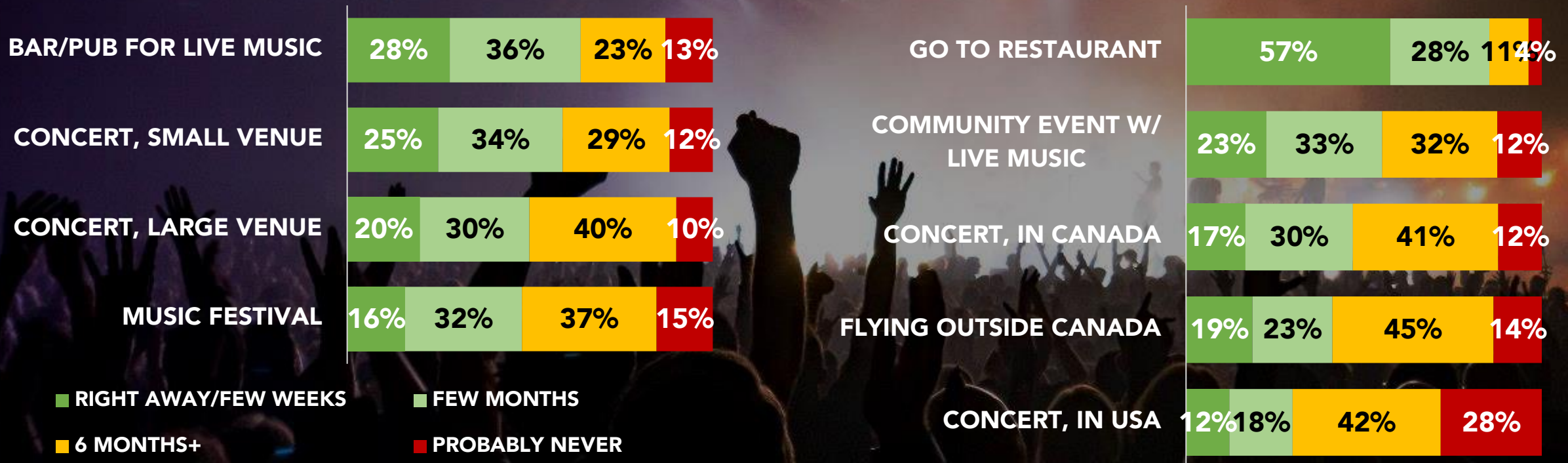
HOW LONG BEFORE YOU'LL FEEL COMFORTABLE GOING TO A CONCERT AGAIN?

When physical distancing restrictions are lifted, how soon will you feel comfortable enough doing the following?



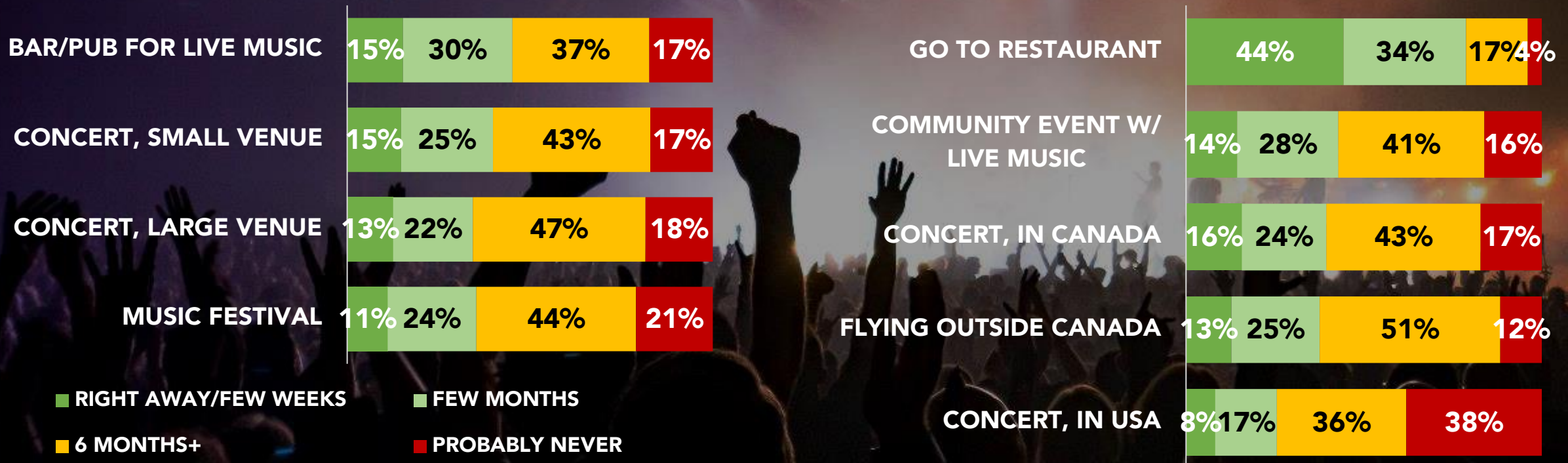
HOW LONG BEFORE YOU'LL FEEL COMFORTABLE GOING TO A CONCERT AGAIN? **18 TO 29 YEARS OLD**

When physical distancing restrictions are lifted, how soon will you feel comfortable enough doing the following?



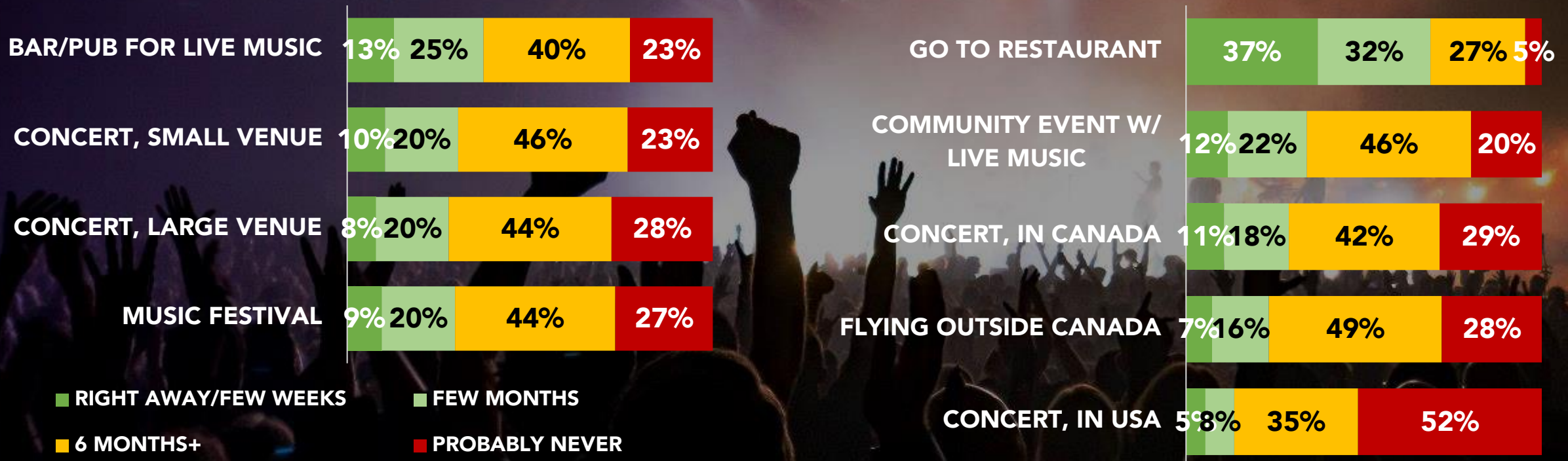
HOW LONG BEFORE YOU'LL FEEL COMFORTABLE GOING TO A CONCERT AGAIN? **30 TO 44 YEARS OLD**

When physical distancing restrictions are lifted, how soon will you feel comfortable enough doing the following?



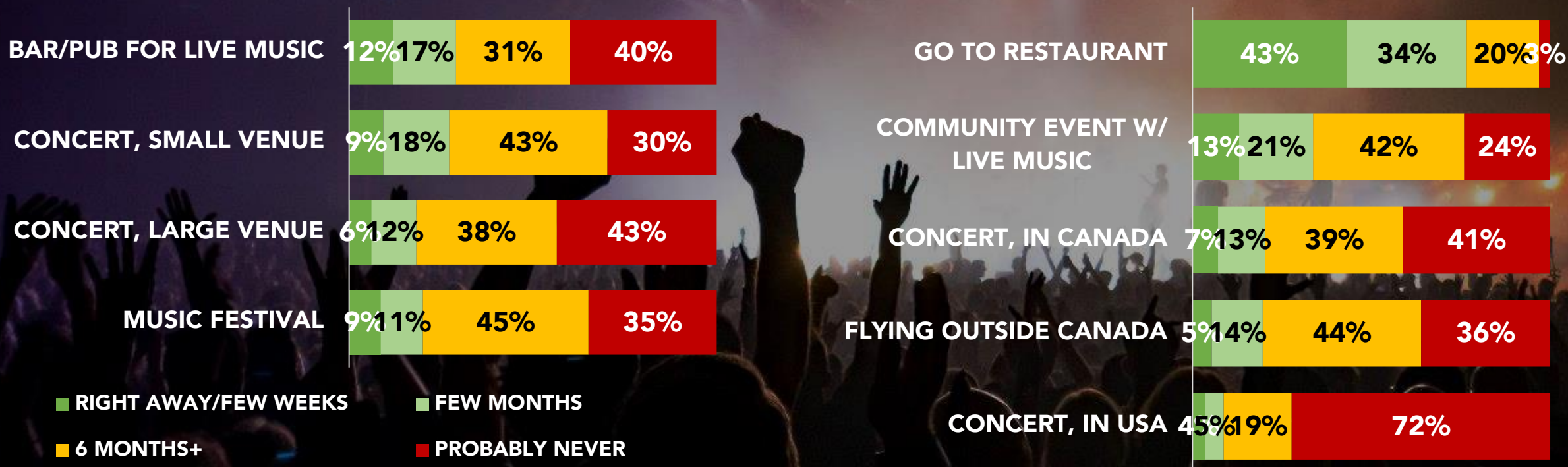
HOW LONG BEFORE YOU'LL FEEL COMFORTABLE GOING TO A CONCERT AGAIN? **45 TO 59 YEARS OLD**

When physical distancing restrictions are lifted, how soon will you feel comfortable enough doing the following?



HOW LONG BEFORE YOU'LL FEEL COMFORTABLE GOING TO A CONCERT AGAIN? **60 AND OVER**

When physical distancing restrictions are lifted, how soon will you feel comfortable enough doing the following?

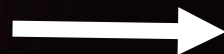




DIGITAL REPLACEMENT

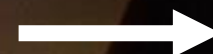
30%

HAVE WATCHED A LIVE
MUSIC SHOW ON
FACEBOOK OR OTHER
PLATFORMS



70%

ARE SATISFIED WITH THE
OVERALL EXPERIENCE



79%

DIGITAL
EXPERIENCES ARE A
SUFFICIENT STAND-
IN, BUT THEY
CANNOT REPLACE
THE REAL THING





BUT WHAT ABOUT THOSE WHO LOVE LIVE MUSIC?

KEY AUDIENCE MARKET SEGMENTATION

LIVE MUSIC LOVERS



26%

OF ADULT CANADIANS

OCCASIONAL



22%

OF ADULT CANADIANS

OCCASIONAL, NO BARS



18%

OF ADULT CANADIANS

INFREQUENTS



34%

OF ADULT CANADIANS

ABACUS DATA

**FOCUSED ON
THEM TODAY**



LIVE MUSIC LOVERS

26%

OF ADULT CANADIANS

Go to bar/pub to listen to live music at least a few times a month	49%
Go to concert in large venue a least a few times a year	81%
Go to a music festival at least a few times a year	62%

DEMOGRAPHICS

Younger:
62% under 45
Higher income:
66% made \$50K+

71%
LOVE MUSIC



OCCASIONAL AUDIENCE

22%

OF ADULT CANADIANS

Go to bar/pub to listen to live music at least a few times a month	11%
Go to concert in large venue a least a few times a year	10%
Go to a music festival at least a few times a year	17%

DEMOGRAPHICS

Younger:
54% under 45
Higher income:
60% made \$50K+

57%
LOVE MUSIC



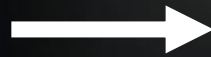


LIVE MUSIC
LOVERS

BROAD AND DEEP WORRIES ABOUT COVID-19.

73%

ARE AT LEAST
SOMEWHAT WORRIED
ABOUT COVID-19



53%

THINK IT WILL TAKE UNTIL
SEPTEMBER UNTIL MOST
DISTANCING RESTRICTIONS
ARE LIFTED



54%

THINK COVID-19 WILL
"REALLY CHANGE
HOW I LIVE"





LIVE MUSIC
LOVERS

MOST HAVE EXPERIENCED DELAYED OR CANCELLED LIVE EVENTS WHICH MAKES THE PANDEMIC EVEN WORSE.

Did you have tickets to any live events that were...

39%



POSTPONED

43%



CANCELLED

58%

SAY THE CANCELLATION OF
LIVE MUSIC EVENTS MAKES
THEM FEEL WORSE ABOUT THE
PANDEMIC.

34-POINT MORE LIKELY THAN
OTHER CANADIANS.

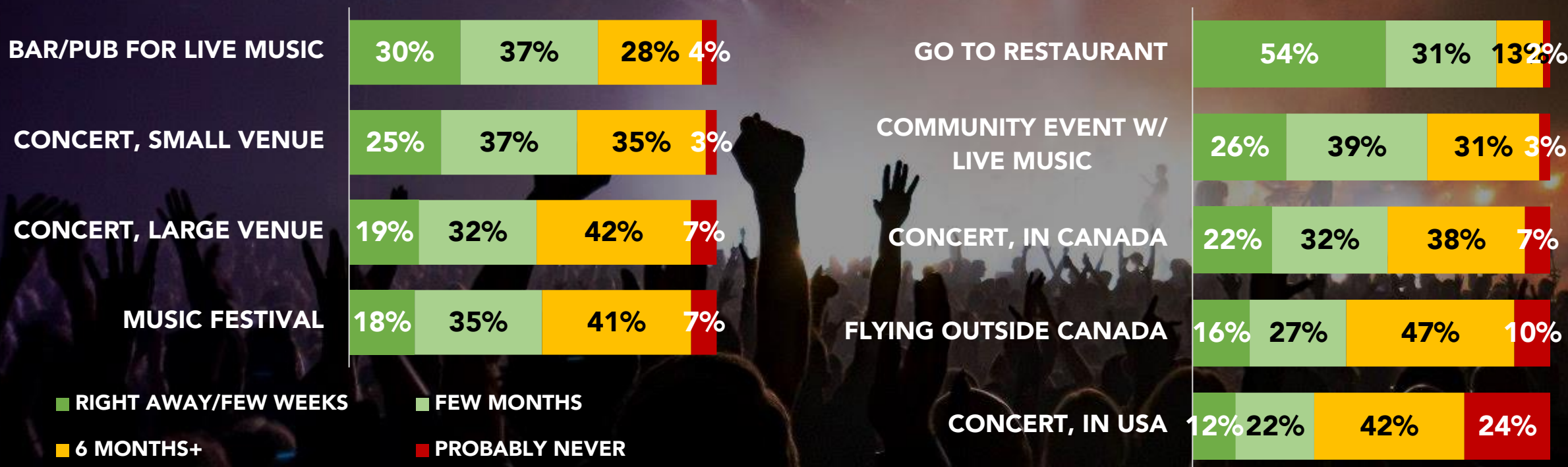




LIVE MUSIC
LOVERS

HOW LONG BEFORE YOU'LL FEEL COMFORTABLE GOING TO A CONCERT AGAIN?

When physical distancing restrictions are lifted, how soon will you feel comfortable enough doing the following?





LIVE MUSIC
LOVERS

MUSIC HAS HELPED THEM GET THROUGH THE QUARANTINE PERIOD BUT DIGITAL DOESN'T REPLACE LIVE.

DISCOVERY

61%

"I DISCOVERED NEW
MUSICIANS AND ARTISTS
DURING THE PANDEMIC"

RECOVERY

86%

"MUSIC HAS BECOME A
WAY TO RELIEVE
STRESS"



REAFFIRM

84%

"FOR ME, DIGITAL CONTENT
WILL NEVER REPLACE THE
FEELING I GET WHEN I SEE
LIVE MUSIC."





LIVE MUSIC
LOVERS

SCENARIO TESTING

% WHO SAY "TOO RISKY"

	NO VACCINE (CONTROL)	NO VACCINE, TEMPERATURE CHECK	NO VACCINE, BUT RAPID TESTING	IMPACT
CONCERT IN USA	71%	60%	56%	11 – 15
FLYING ON PLANE OUTSIDE CANADA	61%	54%	49%	7 – 15
INDOOR CONCERT	52%	46%	40%	6 – 12
MUSIC FESTIVAL	52%	41%	38%	9 – 12
FLYING ON A PLANE WITHIN CANADA	44%	35%	35%	9
BAR/PUB FOR LIVE MUSIC	36%	31%	26%	5 – 10
OUTDOOR CONCERT	37%	31%	25%	6 – 12
RESTAURANT	23%	19%	14%	4 – 9

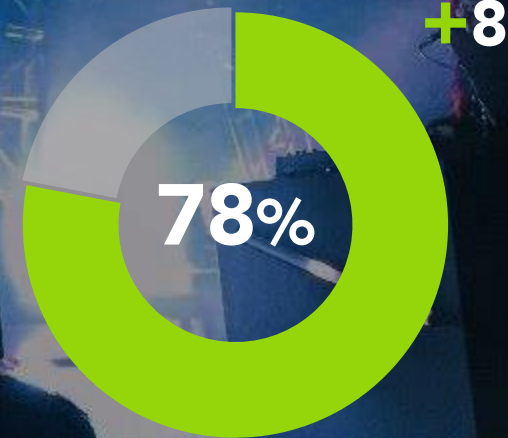




THE DESIRE FOR MUSIC EXPERIENCES IS TRANSFERRING ONLINE, AS HALF SAY THEY HAVE WATCHED LIVE MUSIC STREAMED ONLINE.

+17
47%

**OF LIVE MUSIC LOVERS
REPORT HAVING WATCHED
ANY OF THE LIVE MUSIC
SHOWS ON FACEBOOK OR
OTHER PLATFORMS**



WERE *SATISFIED* WITH THEIR EXPERIENCE

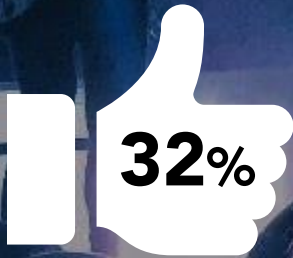
% difference from gen pop



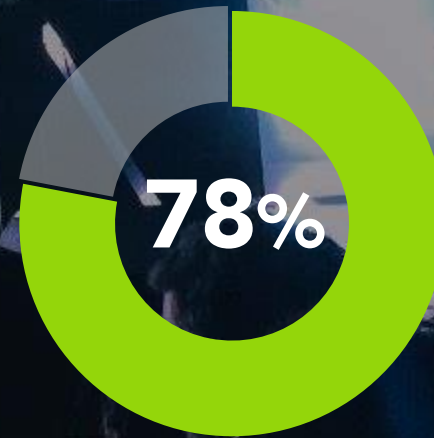
LIVE MUSIC
LOVERS

BUT ONLINE MUSIC SHOWS CANNOT REPLACE EXPERIENCE OF LIVE MUSIC

⁺¹⁷
84% *AGREE* THAT DIGITAL CONTENT CANNOT REPLACE
THE FEELING OF SEEING LIVE MUSIC



FELT IT WAS "*PRETTY GOOD BUT
NOT THE SAME*" AS LIVE MUSIC
SHOWS



FEEL THAT LIVE MUSIC SHOWS ON
PLATFORMS LIKE FACEBOOK ARE
SUFFICIENT FOR NOW, BUT THEY CANNOT
REPLACE THE EXPERIENCE OF LIVE MUSIC

% change from gen pop

ABACUS DATA

WHAT SHOULD YOU BET ON?

1. **DEEP CONCERNS REMAIN ABOUT COVID-19, ESPECIALLY AMONG LIVE MUSIC LOVERS.**
2. **LIVE MUSIC LOVERS DEEPLY MISS THE EXPERIENCE, BUT FEAR OF CONTRACTING THE VIRUS MAY KEEP THEM HOME, EVEN IF ALLOWED TO ATTEND.**
3. **THERE'S A CHANCE THAT UNTIL A VACCINE IS FOUND, REGULAR LIVE MUSIC GOERS WON'T FEEL COMFORTABLE, EVEN WITH TESTING.**
4. **DIFFERENCE BETWEEN BEING *ABLE* TO DO SOMETHING & FEELING *COMFORTABLE* TO DO SO.**