

The Future Landscape of Live Entertainment in the Post-Pandemic Era

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Abstract: The COVID-19 pandemic has led to a dramatic shift in how people consume entertainment, prompting a surge in remote activities and redefining traditional paradigms. As the world grapples with these rapid developments, a crucial and complex question remains at the forefront: can online live performances genuinely supplant the longstanding tradition of offline live concerts or shows? This paper delves deep into this evolving landscape, exploring the dynamic interplay between these formats while considering a multitude of factors. It considers audience preferences, highlighting how online concerts have proven financially lucrative but often lack the emotional depth of their offline counterparts, which, remarkably, continue to thrive and are even projected to surpass pre-pandemic revenue levels. Amidst these considerations, a new trend emerges with hybrid concerts, blending online and offline elements to cater to diverse preferences. In this transformative and ever-evolving environment, both formats coexist, offering artists and audiences a vibrant spectrum of options, ultimately reshaping the future of the entertainment industry.

Keywords: Coronavirus, music, concerts, live entertainment, virtual concerts

1. Introduction

The global landscape has undergone an unprecedented transformation in a world still grappling with the far-reaching effects of the COVID-19 pandemic. The pandemic has led to a seismic shift in how people consume entertainment, prompting a surge in remote activities and redefining traditional paradigms. One noteworthy trend that has gained remarkable traction worldwide is the surge in online live performances.

The current trend in the live entertainment industry is the remarkable rise of online live performances, wherein artists of various genres and backgrounds have readily embraced digital platforms to deliver their talents directly to audiences' screens. As a result, millions of individuals, constrained to their homes, have discovered solace, connection, and entertainment in the virtual realm. This trend, accelerated by the necessity of the pandemic, raises profound questions about the future of live entertainment in a post-pandemic world.

This transformative moment in the entertainment industry has sparked a flurry of research and discourse. Scholars and industry experts have sought to comprehend the implications of this digital revolution, exploring its advantages and limitations. Developments in this field have encompassed studies on audience behavior, the economic impact on artists and venues, and the evolution of

technology to enhance the online experience. However, amidst these rapid developments, there exists a conspicuous gap in a comprehensive analysis of whether online live performances can genuinely supplant the longstanding tradition of offline live concerts or shows.

It is within this context that this paper aims to explore the intricate interplay between online and offline live performances in the post-pandemic era. Specifically, it scrutinizes the multifaceted question: Can online live performances replace traditional offline live concerts or shows? To unravel this complex inquiry, the paper delves into audience preferences, economic considerations, technological advancements, and the emotional resonance of both formats. The paper does not merely provide an answer but endeavors to offer a nuanced understanding of how these two seemingly divergent realms of live entertainment can coexist and complement each other, thereby shaping the future landscape of this vibrant industry.

In the pages that follow, the research embarks on a journey of exploration, analysis, and contemplation, ultimately shedding light on the evolving tapestry of live entertainment in a world irrevocably altered by the events of the past.

2. The Evolution of Online Concerts during the Pandemic

The live music business came to an abrupt, unexpected stop in early 2020 with the onset of the COVID-19 epidemic. Concerts, festivals, and tours were canceled or postponed as public gatherings became a risk. This abrupt disruption left artists, promoters, venues, and fans grappling with uncertainty and financial losses [1]. For example, the date of the global tour of the South Korean boy band BTS (Bangtan Boys) had to be changed due to concerns about the coronavirus [2]. With amazing sales of \$4.1 million, their most recent album, "Map of the Soul: 7," has become the best-selling record in South Korea. 'BTS World Tour: Love Yourself' was their previous tour, which ran from August 2018 to April 2019. It won the Tour of the Year prize at the 2019 American Music Awards. The epidemic finally forced the cancellation of the new tour, which was supposed to break all previous records for live performances. [3].

In response to these challenges, the music industry swiftly pivoted to adapt to the new normal, leading to the emergence of online concerts as a viable alternative.

Online concerts began as informal and often impromptu live streams from artists' homes, using platforms like YouTube, Facebook, Instagram, Twitch, and Zoom. Performances posted on YouTube, Facebook, and Instagram can be either live or prerecorded, but Twitch or Zoom only provide live performances. These initial performances were marked by a sense of authenticity and vulnerability, with artists providing a direct and unfiltered connection with their audience through chatbox or reaction buttons [4].

It didn't take long for musicians and their teams to recognize the need to enhance the production quality of online concerts. As artists, as well as entertainment companies, realized the foreseeable future financial losses without concerts, they started investing in better audiovisual equipment, such as high-quality cameras, microphones, and professional lighting setups to hold official online concerts for profit.

In October 2020, BTS streamed two live concerts titled "Map of the Soul ON: E" [5]. During the concert, viewers had the choice of six camera angles to watch simultaneously, allowing them to select their preferred view. Additionally, a chat box on the right side of the screen enabled fans to comment and interact with fellow BTS enthusiasts in real-time. Fans could also sync their "BTS Lightstick" via Bluetooth to match the song's colors, replicating the experience of using it at physical concerts. These live streams, which attracted almost a million viewers from more than 190 countries and regions and brought in at least \$35 million in ticket sales [6], have served as a model for virtual concert productions.

The T-Mobile-sponsored Justin Bieber New Year's Eve performance took place on December 31, 2020, and was live-streamed twice more in January [7]. Other performances included pop, rock, and country, as well as smaller musical performers that accepted fixed-price online concert platforms [7].

As the pandemic persisted, dedicated platforms designed for hosting online concerts gained traction. Ticketed live streamed concerts generated US\$0.6 billion in 2020 [8]. Artists and event organizers began selling tickets to access exclusive online performances, providing a much-needed revenue stream during a time of financial uncertainty. This transition marked a significant shift from free or donation-based live streams to a more structured and monetized approach, demonstrating the industry's adaptability and resilience.

Furthermore, the ongoing technology innovation played a crucial role in the development of online concerts. Artists and production teams began incorporating augmented reality (AR) and virtual reality (VR) elements into their performances. These technologies, which were used to create immersive experiences, opened up new possibilities for artistic expression, taking online concerts to a level that transcended the limitations of physical venues [9].

3. The Resilience of Offline Concert

Earlier this year, research conducted by Pricewaterhouse Coopers International (PwC) indicated that the live music industry is on track to surpass its pre-pandemic performance. In 2023, live music ticket sales are projected to exceed the \$21.5 billion recorded in 2019 before the global pandemic, as detailed in the Global Entertainment & Media Outlook 2023–2027 study [10].

The live music sector has made a gradual recovery, bouncing back from a significant drop in revenue to \$5.4 billion in 2020, then reaching \$10.2 billion in 2021 and \$20.3 billion in 2022. The report anticipates that live music earnings will continue to grow steadily, reaching an estimated \$25.6 billion by 2027. Additionally, it foresees a resurgence in live music sponsorship, hitting \$5.7 billion by 2024, matching 2019 figures, and rising to \$6.1 billion by 2027. Furthermore, the combined revenue from live music and cultural events is expected to surpass the 2019 total of \$66.6 billion by 2024 [10].

While the COVID-19 pandemic led to an extended period of inactivity in the live music industry, PwC emphasizes its significance and underscores that it is now positioned to outperform the entire entertainment and media sector. Revenues from live experiences are predicted to grow at a Compound Annual Growth Rate (CAGR) of 9.6% from 2023 to 2027, which is four times the 2.4% CAGR forecasted for total consumer revenue. This underscores the enduring appeal of live events [10].

4. Comparison Between Online and Offline Concerts

4.1. Profitability

In the financial analysis of a Chinese pop group TFBOYS's offline and online concerts in 2019 and 2020, critical insights have emerged. Live concerts, with their 18,000-person capacity and tiered ticket pricing, generate substantial revenue, totaling around \$4,600,000 [1]. However, they entail additional costs, including security and paper ticket distribution, resulting in a profit of approximately \$4,525,000. In contrast, online concerts, with their vast accessibility, reach an audience of approximately 700,000, generating impressive revenue of approximately \$12,000,000. While they share common costs with live concerts, such as artist compensation and production expenses, online concerts also bear the cost of souvenir products for high-tier ticket buyers, leading to a total cost of approximately \$63,000. Consequently, online concerts yield a substantial profit of approximately \$11,937,000. The key takeaway is that despite comparable total costs, online concerts prove considerably more profitable due to their unrestricted audience capacity. In

conclusion, online concerts have demonstrated their financial viability and superiority, earning significantly higher profits than live concerts, marking a noteworthy trend in the evolving landscape of music performance.

4.2. Sustainability

When comparing the sustainability of online and offline concerts, a multifaceted assessment emerges. According to the energy consumption of TFBOYS's concerts calculated by Yi Fan et al, online concerts, with their larger viewer base, produce significantly more carbon emissions at 93,902.4 kg compared to the 12,407.7 kg emitted during a live concert [1]. However, when considering emissions per participant, online concerts exhibit greater sustainability, generating only 0.206 kg of CO₂ per participant, a fraction of the 0.994 kg emitted by live events. Furthermore, online concerts demonstrate clear environmental advantages in ticketing practices by eliminating paper tickets, resulting in no carbon emissions, water use, or ticket-related expenses.

In terms of Light Boards and Electronics, live concerts for 18,000 attendees result in higher overall emissions and water usage [1]. However, when viewed on a per-capita basis, online concerts are the more sustainable choice, with per-capita carbon emissions of 0.063 kg and per-capita water consumption of 10.679 kg, compared to live concerts with per-capita emissions of 0.184 kg and per-capita water usage of 31.200 kg.

Regarding express costs and associated environmental consequences, online concerts incur expenses of \$17,787, generating 2,572.7625 kg of carbon emissions and using 57.75 kg of water in express box production [1]. In contrast, live concerts have minimal resource consumption in merchandise transportation, showcasing their sustainability in this aspect.

4.3. Satisfaction

In a study conducted by Hyun Ju Hong and Seung in Kim on the factors influencing the user experience of online concerts, the findings underscore the significant role of functional, reliable, and user-friendly attributes in shaping user satisfaction with online concert experiences [11]. The analysis reveals that audience satisfaction primarily stems from the ease of access, reasonable pricing, and effective live-streaming capabilities offered by online concerts. However, it is noteworthy that viewers tend to rate the emotional gratification derived from online concerts lower. When asked about the presence of unique and emotionally moving elements exclusive to online concerts, over half of the respondents indicated "not so many", "no", or "absolutely not". Further examination of specific elements of enjoyment reveals that 38% of respondents mentioned technical support (such as CG, AR, XR) and diverse performances as sources of pleasure, while 35% cited factors like clear picture quality and composition (including multiview and close-ups). Only a small percentage mentioned ease of viewing, real-time communication, high attention, or other factors. Notably, emotional resonance, a common aspect associated with offline concerts, was rarely reported by online concert audiences.

On the other hand, a satisfying offline concert experience often comprises keywords including "passion", "energy", "great interaction with audiences", and "amazing environment", according to reviews for Taylor Swift on Ticketmaster.

4.4. Emotional Support

Offline concerts undeniably wield a profound emotional impact. In a recent report on live performance intrinsic impact, researchers assessed emotional resonance through audience responses, connection with performers, and therapeutic value [12]. The study collected 90 responses, yielding an aggregated Emotional Resonance Index. Notably, music concerts stood out from different forms of performance, with audiences consistently reporting higher emotional resonance, registering

+0.30 standard deviations above the mean. This underscores the potent emotional impact of live music.

The study also explored spiritual impact, examining upliftment, transcendence, and empowerment [12]. Music performances consistently received above-average scores on the Spiritual Value Index, providing evidence that live music performances hold the potential to offer not only positive spiritual value to audiences.

Moreover, live concerts emotionally support not only audiences but also artists themselves. During the "Permission to Dance on Stage" live concert, BTS members expressed mixed emotions about their online virtual concert held in an empty 70,000-seat stadium [13]. They felt a sense of nostalgia and sadness due to the absence of a live audience. "After two years, I noticed that I was losing my motivation. I require the drive to carry on both as an individual and as a BTS member." said the leader of team RM, "So I'd really looked forward to tonight, because ... I need to see you, connect, and dance".

On the other hand, although streamed concerts provide a sense of comfort and closeness throughout the pandemic, whether this positive impact on audiences' mental health will remain in the post-pandemic era. A recent study shows that the pandemic's significance played a role in generating *kama muta* (an emotion of being moved by love), and this effect was entirely influenced by the sense of social connection [14]. More specifically, when the pandemic was more prominently featured, it led to a stronger emotional response, but only because it increased the feeling of social connection among the audience.

5. Motivation Analysis of Concert-goers

The research conducted by Martijn Mulder and Erik Hitters provides valuable insights into the motivations behind pop music concert attendance, shedding light on the distinct factors that drive individuals to participate in these live music events [15]. The study's primary objective was to explore the extent to which these motivations align with those of music festival attendees. Through the development of the Live Music Motivation Scale (LMMS) and an extensive sample size of 1131 Dutch people who had attended a live pop music event (concert or music festival) within a year prior to the survey, the researchers identified six key components that shape the motivations of live music event-goers: togetherness, escapism, discovery, being there, uniqueness, and music-specific.

The most compelling and influential motivating factor identified is "togetherness". This component encompasses a wide range of aspects, including the opportunity for socialization with known groups, engagement in external socialization, creating a unique atmosphere, and participating in uninhibited behaviors such as dancing, singing, and partying. When combined, these elements collectively contribute to the motivation of togetherness, emphasizing the sense of communal bonding that offline concerts offer.

A significant motivation identified is "escapism", which encompasses elements associated with escaping the routines of daily life and engaging in behaviors that may not be acceptable in typical social settings [15]. This motivation reflects the desire for a respite from the ordinary and the chance to experience a carefree and liberating environment, which offline concerts often provide.

The third component, labeled "discovery" is characterized by items related to exploration, enrichment, and curiosity [15]. This motivation highlights the desire to discover and engage with new experiences, which aligns with the sense of novelty and excitement that offline concerts can offer.

Conversely, the "music-specific" component, the weakest among the six motivations, directly relates to the artistic content of the event [15]. It reflects the motivation to hear new music or different versions of songs that may not be part of the recorded repertoire. While this motivation

underscores the significance of the music itself, it may not be the primary driver for attending offline concerts.

The findings indicate that offline concerts continue to dominate in terms of providing a platform for the profound fulfillment of these motivations. The tangible, in-person presence of like-minded individuals in the same physical space amplifies the sense of togetherness and escapism, creating an environment where attendees can fully immerse themselves in the shared energy and atmosphere of the event. Offline concerts offer a unique opportunity for concertgoers to form deep connections with fellow attendees, reinforcing their sense of belonging to a vibrant and dynamic social community. In contrast, while music-specific motivations remain important, they do not differentiate significantly between offline and online performances, suggesting that the live music itself may serve as a common thread in both settings. Nonetheless, it is the social and experiential dimensions of offline concerts that continue to set them apart as a preferred choice for frequent concert enthusiasts, reaffirming their enduring appeal in the ever-evolving landscape of live music events.

6. Future Trends in Live Entertainment

While many artists are returning to the production of offline concerts, a growing number of artists are embracing hybrid concerts, which allow both online and offline performances to occur simultaneously. A large-scale study by Bandsintown shows that over 80% of artists express a willingness to make live streaming a permanent part of their performance plans even after the resumption of live concerts, and over 60% of music listeners also express this willingness to continue live streaming concerts after the reopening of music venues [16].

Hybrid concerts epitomize a delicate equilibrium, balancing the enhancement of audience experiences with the fulfillment of organizers' financial expectations. They acknowledge the unique merits of both online and offline formats, catering to diverse audience preferences and motivations. Hybrid concerts have emerged as an inclusive choice for fans of all kinds. A prime example is BTS's groundbreaking offline concert, "Permission to Dance on Stage LA", which not only raked in a remarkable \$33.3 million in revenue and sold 214,000 tickets but also attracted an astounding 581,000 additional fans for the online streaming on December 2nd [17, 18]. With ticket prices ranging from \$46.1 to \$69.3, the online streaming component not only significantly bolstered overall profitability but also fulfilled the desires of countless fans to spend important moments with their favorite artists.

A compelling contrast emerges when examining the approach of Eastern and Western music industries to live-streaming activities [19]. K-pop labels have exhibited a remarkable readiness for live streaming, largely owing to their vertically integrated structure. This integration streamlines decision-making and support across multiple business units. In contrast, Western artists often operate as independent entities, necessitating the streamlining of their value chain to navigate live streaming successfully. The industry may witness more Western acts embracing live streaming as they establish better organization and partnerships, smoothing their transition into the digital space. Both Eastern and Western artists possess the potential to thrive in the expanding live-streaming market, each encountering unique opportunities and challenges.

Looking ahead, several trends are expected to shape the landscape of online concerts. One significant trend is the increasing engagement of at-home audiences. As technology continues to advance, fans are likely to enjoy more immersive and interactive experiences during live-streamed events [19]. The emotional connection between artists and their global fan communities will significantly influence the future of online concerts. Music's unifying power transcends geographical boundaries, and the digital sharing of these moments has the potential to foster a profound sense of unity among fans worldwide. However, it is important to note that until online

concerts can replicate the emotional resonance and physiological reactions provided by live performances, offline concerts will likely remain the preferred choice of concert-goers.

7. Conclusion

In conclusion, the post-pandemic era has seen the coexistence of online live performances and traditional offline concerts, with each format offering unique advantages.

Online concerts have proven financially viable, thanks to their ability to reach global audiences, but they may lack the emotional resonance of offline events. Offline concerts, on the other hand, continue to thrive due to their ability to foster togetherness, escapism, and a sense of community.

The future likely holds a dynamic blend of both formats, with hybrid concerts gaining popularity. Technology will play a significant role in enhancing online experiences, but until they can replicate the emotional impact of offline concerts, the latter will remain a preferred choice for many.

In this evolving landscape, the coexistence of online and offline live performances offers diverse options for artists and audiences, reshaping the future of the entertainment industry.

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