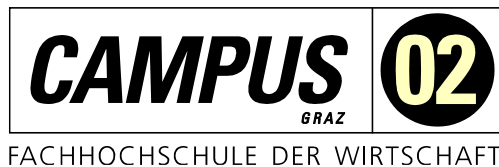


Master Thesis

**THE FUTURE OF ROCK AND HEAVY METAL
CONCERTS IN EUROPE – A NEW BUSINESS
CONCEPT IN THE POST CORONA WORLD!**

accomplished at



Master's degree program
Innovation management

by

BS Sebastian Münch

ID-Number: 2010318010

supervised and reviewed by

Dr. Ronald Tingl

reviewed by

FH-Prof. Di Dr. mont. Michael Terler

Graz, December 2021

.....
Signature

DECLARATION OF ACADEMIC HONESTY

I, hereby declare that I have authored this thesis independently, that I have not used other than the declared sources and resources, and that I have explicitly marked all material which has been quoted either literally or by content from the used sources.

.....

Sebastian Münch

ACKNOWLEDGEMENTS

I would like to send my appreciation to FH-Prof. Di Dr. mont. Michael Terler, Dr. Ronald Tingl and Mag. Sandra Pilch for all their help throughout the innovation management master studies. Laura Reiche and Christina Treichler for their ongoing support and friendship and Metallica's "Wherever I May Roam" for starting my love and addiction to Heavy Metal music. Most important, I would like to say thank you, to my baby, Beatrix Jörg, for all her love and understanding.

KURZFASSUNG

Zahlreiche kleine und mittlere Rock- und Heavy-Metal-Bands und Booking-Firmen sahen sich schon vor dem Ausbruch der COVID-19-Pandemie mit ernsthaften wirtschaftlichen Herausforderungen konfrontiert. Eine ständig wachsende Zahl von Bands, die bereit sind, in einer begrenzten Anzahl von europäischen Schlüsselmärkten zu touren, um die rückläufigen Verkäufe physischer Alben und die geringen Einnahmen durch digitale Streaming-Anbieter auszugleichen, haben zu einer Kannibalisierung des Marktes für Live-Tourneen geführt, die durch ein alternendes Kundensegment, das nicht in der Lage oder nicht bereit ist, Live-Veranstaltungen zu besuchen, weiter angeheizt wird. Das Hauptziel dieser Arbeit ist es, eine Handlungsempfehlung zu präsentieren, wie Booking-Unternehmen und Bands neue technologische Möglichkeiten in ihr derzeitiges Geschäftsmodell implementieren können, um den Kundenservice zu verbessern und die Zufriedenheit der Fans zu erhöhen.

Die durchgeführte Literaturanalyse gibt einen Einblick in den aktuellen Stand der Musikindustrie und das bisherige Touring-Geschäftsmodell einschließlich einiger aktueller Band-Fallstudien. Darüber hinaus werden die aktuellen und zukünftigen technologischen Trends aufgezeigt, die für kleine und mittlere Booking-Unternehmen und Bands relevant werden könnten.

Das theoretische Ergebnis zeigt, dass digitales Streaming und hybride Live-Events die realistischsten Geschäftsmöglichkeiten sind, um die Kundenzahlen zu erhöhen und zusätzliche Einnahmequellen zu erschließen, insbesondere während der COVID-19-Pandemie und in den darauffolgenden Jahren.

Eine Kundenbefragung und ein Kundenfokusgruppen-Workshop wurden durchgeführt, um die wichtigsten Kundenbedürfnisse zu ermitteln. Die aktuellen und zukünftigen Hindernisse und Hemmnisse der Kunden, an einem digitalen Event teilzunehmen, aber auch die Erfolgsfaktoren, wenn sie angewandt werden, führen folglich zu Kundenbegeisterung.

Die empirischen Forschungsergebnisse bieten Booking-Unternehmen und Bands die Möglichkeit, verschiedene Kundenbedürfnisse umzusetzen, um die Ticketing- und Merchandising-Einnahmen zu steigern und gleichzeitig neue Kunden zu gewinnen und die Kundenbindung zu erhöhen.

ABSTRACT

Many small and medium size rock and heavy metal bands and booking companies have been faced with serious economic challenges, even before the beginning of the COVID-19 pandemic. An ever-increasing number of bands ready to tour, in the limited European key markets, driven to off-set declining physical album sales and small revenue incomes by digital streaming providers, have resulted in a cannibalization of the live touring market, further fuelled by an aging customer segment unable or unwilling to attend live events. The main objective of this thesis is to present a plan of action, on how booking companies and bands can implement new technological opportunities to their current business set-up to enhance customer service and raise fan satisfaction.

The conducted literature analysis provides an insight of the current state of the music industry and the past touring business model including some actual band case studies. It further reports the current and future upcoming technological trends that could become relevant for small and medium size booking companies and bands.

The theoretical result identifies digital streaming and hybrid live events as the most realistic business venue to increase customer numbers and additional revenue streams; particularly during the COVID-19 pandemic and the years that will follow.

A customer survey and a customer focus group workshop were conducted, to identify the most important customer needs. They identified current and future customer obstacles, and hesitations to join a digital event and the success factors, that when applied, result in customer excitement.

The empirical research results provide an opportunity to booking companies and bands to implement various customer needs to increase ticketing and merchandising revenues, while attracting new customers and enhance customer loyalty.

TABLE OF CONTENT

1	Introduction.....	1
1.1	Preface.....	1
1.2	Problem Description	1
1.3	Research Questions	3
1.4	Goals of the thesis	3
1.5	Reference Framework	5
1.6	Structure of the Thesis.....	6
2	Definitions and Background Information	8
2.1	When digital music changed the music industry.....	8
2.2	Deeper meaning of live music	9
2.3	Live Concert Streaming	10
2.4	Hard Rock and Heavy Metal.....	11
3	Overview of the music market segment in germany 2021	12
3.1	Total sales generated in the live music segment for Germany	12
3.2	Digital Streaming Sales History for Germany	13
3.3	Sales Development physical music carrier for Germany.....	14
4	Live Events and Touring.....	17
4.1	Definition and touring concept	17
4.2	Live Event and Touring Venue Performance Agreement.....	20
4.3	Touring in 2019: The business model of European Tours with a customer capacity of 100-1000 people	21
5	Touring alternatives during the COVID-19 crisis.....	29
5.1	Digital Streaming of live events	29
5.2	Digital Streaming as a strategy to win back customers	30
5.3	Digital Streaming and Hybrid Events - Case Studies	33
6	New business opportunities and innovations after the corona crisis	41
6.1	Hybrid live music events	41
6.2	Holograms Live Events	43
6.3	Competitive advantage through innovative live locations	45
6.4	Virtual and Augmented Reality	46
6.5	Metaverse	47
6.6	Blockchain & Non Fungible Token.....	47
7	Technology Possibilities	48
7.1	Live Streaming and Hybrid Technology.....	48
7.2	Hologram Technology.....	49
8	Theoretical Findings, Selection of Success Factors And Recommendation	50
8.1	Research results for digital streaming and live events, innovations, and available technology .	51

Table of Content

8.2	Success potential for digital and hybrid live events	52
8.3	Success Factors	53
8.4	Recommendation of future action steps (Handlungsempfehlung)	54
9	Empirical methods to generate consumer insights, trends and value	59
9.1	Identifying Hidden Customer Needs	59
9.2	Personas	60
9.3	Customer Insights from the Kano Model	61
9.4	Customer Journey – Digital Live Streaming Event	63
9.5	Brainstorming – Digital Live Streaming Event	66
9.6	The 9 Windows Technique – Digital Live Streaming Event.....	66
10	Quantitative Customer Survey	69
10.1	Aspiration of the Quantitative Customer Survey.....	69
10.2	Selection of Participants	69
10.3	Customer Survey Trial Phase	70
10.4	The Customer Survey Outcome	71
11	Customer Focus Group Workshop.....	83
11.1	Aspiration of the Focus Group Workshop.....	83
11.2	Selection of participants.....	83
11.3	Customer Focus Group Trial Phase	84
11.4	Customer Focus Group Workshop Event.....	86
12	Findings and rendition of the quantitative customer survey and focus group workshop	101
12.1	Customer segment creation based on the quantitative customer survey and findings	101
12.2	Assessment of service development and customer satisfaction based on the Kano model....	105
12.3	Booking company and band recommendations	109
12.4	Digital group streaming events as an innovative enhancement	112
13	Conclusion.....	113
13.1	Outlook.....	114
	List of Literature.....	115
	List of Illustrations.....	119
	List of Tables	121
	Appendix 1 Customer Survey.....	122
	Appendix 2 Customer Focus Group Workshop.....	129
	Appendix 3 Customer Focus group workshop impressions	133

1 INTRODUCTION

1.1 Preface

The live music industry in Europe, particular for small and medium size booking companies and bands in Europe has been facing numerous challenges to sustain the current business models. The rock and heavy metal super stars like AC/DC, Metallica and Iron Maiden continue to attract large number of fans and concerts typically sell-out within hours. However, small, and medium size bands and booking companies, struggle with declining numbers in fan attendance and have found themselves competing over the availability of live venues due to an oversaturation of bands wishing to perform live. The oversupply of bands, willing to perform live, is the direct result of declining income opportunities caused by the loss of physical album sales.

The live touring and booking event industry, overlooked for many years, new business concepts to generate new revenue streams and capture customer value. A new business concept is needed to revive the industry, particularly after the current challenges in the COVID-19 world.

1.2 Problem Description

According to Darwin's Origin of Species, it is not the most intellectual of the species that survives; it is not the strongest that survives; but the species that survives is the one that is able best to adapt and adjust to the changing environment in which it finds itself. ¹

Having worked in the heavy metal recording business for well over a decade as an A&R and product manager for one of Europe's leading record labels, significant change has always been part of the day-to-day business. Even ten years ago, during a scheduled a routine business set-up; the label and artist agreed on an album release date, the artist submitted album artwork, album master and ideally creative promotional band photos. Closer to the album release a band would deliver one official music video while the label helped in financing and preparing a second video, typically a lyric video, to create more awareness for the album release. Finally, the label would discuss and organize all necessary print ads, for all leading rock and heavy metal magazines, particular in the key markets, Europe, and the United States of America. For a European band an album release meant the immediate start of a two-to-three-week-album release tour. Perhaps six to twelve months later the same band would play a second tour. After that, both band and label would return to step one.

In recent years, the music business album release set-up and bands touring arrangements has changed significantly. The decline of high street record stores has shifted the focus on record labels reaching customers directly through own webstores and other direct D2C business strategies. Labels are

¹ Cf. Darwin (1859), n.p

encouraged to offer customers a variety of products beginning with the resurrection of the good old vinyl as sound carrier. Also, customers demand more personalized and high-end products in form of CD and different coloured vinyl deluxe editions and deluxe fan boxes. These D2C business activities are the result of a divided customer base with entirely different customer needs. One customer segment that is willing to spend more money on highly limited products and a second one, that has turned away from all physical products and solely consumes music as a digital and streaming product. Labels and bands are required to provide various music videos, behind the scenes and making-of footage. A typical album release sees the release of three different videos being released simultaneous alongside digital singles and pre-order instant gratification releases, when customers purchase the full-length album digitally.

The rise of digital consumption has resulted in lower record label album advances, decreased tour-support budgets reflecting overall declining album sales expectations, resulting ultimately in slimmer royalty earnings. In the past, touring was meant to promote the release of a new album. In today's business, the only profit made from touring is often in form of concert fees and merchandise sales. What at first sounds like a logical business strategy, creates an entirely new set of problems, the oversaturation of the live market. Fans now have an oversupply of bands playing in some key markets while other markets are too expensive to access, resulting in declining tickets sales in some markets while others remain unreachable. Enough challenges? Unfortunately, not!

In early 2020 COVID-19 reached Europe and as a result the entire live music industry came to a grinding halt. All operating clubs and venues shut down and, in many cases, remain so, as Europe is facing the fourth wave of and rising numbers of people falling ill due to the Corona virus. Most touring and festival activities have been postponed first from 2020 to 2021, now in many cases already to a later time in 2022.

The starting point of the research investigation is, the argument that bands and their booking companies have been working in a highly challenging, unstable, and financially limited section of the music industry, for at least a decade. The COVID-19 crisis is just another handicap that requires a new re-evaluation of the traditional business model. In addition, it can be argued, that most business models are limited to an "physical present" live audience thereby ignoring positive income improvement opportunities by capturing additional customer segments and increasing overall customer value. The participation of online and digital fans as a new customer segment, as well as "hybrid" events, are becoming, triggered by the COVID-19 crisis, a discussion to be taken seriously.

The problem statement purposely ignores, highly successful mainstream rock, and heavy metal acts to the likes of: Iron Maiden, Metallica, Slipknot, Muse and Five Finger Death Punch, to name just a few. The primary investigation here, lies on bands and booking companies that traditionally have a business model set up that would attract an audience in the range of between 100 and 1000 fans per event and show.

The focus in the problem statement is comprised around the question how the rock and heavy metal live industry, in particular booking companies and to some extent bands can capture new customer segments using digital, pre-recorded or another hybrid forms of online and digital consumption? How can these, along with other technological and organisational innovations can create value to live customers? What are the current technological conditions and which innovations are just around the corner to increase mutually, both digital customer and regular event attendees?

1.3 Research Questions

Building on the problem statement discussed in the previous section, the research question is:

What are the innovative and technological opportunities to enrich a live music experience?

A central point of the research will identify the traditional touring set-up of bands in Europe that attract an audience anywhere between 100 up to 1000 fans per event. What were the key ingredients and success factors for booking firms or bands, given an average tour? How did COVID-19 change the business model and what are the consequences that will follow once the world goes back to normal? How could a live event look in the future? Will the live music industry embrace new innovations and technical possibilities? In recent years there has been little focus on how fans decide to purchase tickets for an event. How do customers even decide, which event they commit to and which ones they leave out? One focus is to map out a customer journey from the time an event is announced to the reflection period after an event has been visited. Which customer desires have been ignored? Maybe it is not the ground-breaking innovations that will make an event successful but in many cases the moment customer needs are identified, and options are presented. With the COVID-19 pandemic it can be expected that some technologies, that in the past were available, but used seldomly, could be resurrected and become now, the key ingredient for a successful event. Perhaps, the idea to have a physical attending audience could become obsolete. To validate the research question experts from live booking companies, record labels, live venue management, promotion, and management and finally bands could help answer the question of which changes could create customer value and help events to develop new competitive advantages. Most importantly, what hidden needs do customers have?

1.4 Goals of the thesis

The primary focus on how the future of rock and heavy metal concerts in Europe could look like, will provide a better understanding by researching and providing the following findings:

1) To identify the most important customer needs, that would allow online and digital concert events to become an enrichment to customers, band and booking companies.

Understanding customer needs requires a deep comprehension of the process to which customers first become aware of upcoming live events followed by purchasing decisions that lead to the actual event and how customers review the event. Are online and digital events, perhaps even a hybrid business concepts one solution to increase customer satisfaction? Are there other outside factors that need to be considered which would help booking firms to achieve a competitive advantage?

2) To give recommendations on how a concert experience that would typically attract an audience of an average of 100 - 1000 capacity, could raise economical value by adding innovative online and digital services.

All recommendations will follow the idea to identify which digital and online services are currently available and are being used by bands and booking companies. Which ones could become an addition to future business concepts and to answer questions on how relevant online and digital service offerings will become once the COVID-19 pandemic has disappeared? Given the economic realities of smaller events can they even be realized and if so to which extent?

3) To summarize and describe innovative technology ideas, that in the future, could generate customer value and allow digital, online, and streaming events to be successful.

The primary research concentrates on digital and online opportunities for current and future live events and its question of if they could add value to customers and booking companies alike. However, digital, and online technical innovations are likely just one aspect of creative new ideas and business concept. The main task comprises in identifying the most promising ones.

4) To suggest an alternative business concept to enhance the economic future of the live music business.

First and foremost, through the understanding of new technological and innovative research ideas new business concepts could be recommended to booking firms and bands. A full understanding of a typical customer journey, quantitative customer questionnaire and in-depth customer focus-group workshop, could provide important answers.

1.5 Reference Framework

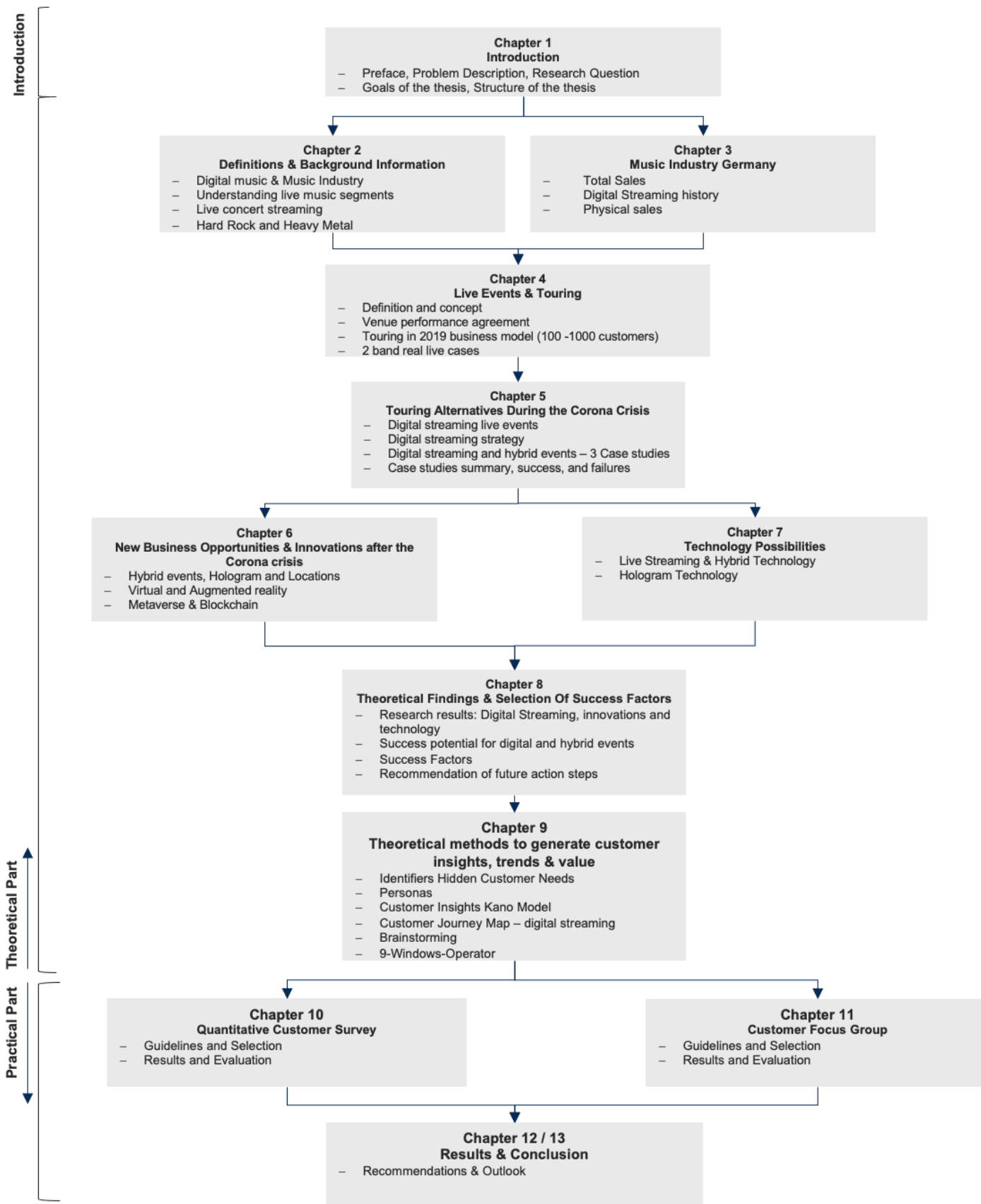


Illustration 1: Reference Framework, Own Illustration

1.6 Structure of the Thesis

Chapter 1

The reader is introduced to the idea behind the topic, problem definition, initial situation, and goal of the master's thesis.

Chapter 2

The opening chapter describes the terminology of rock and heavy metal, physical and digital album streams and the idea behind live concerts and digital live streams.

Chapter 3

The focus of this chapter is total record sales, digital music sales and revenue numbers of the music industry in Germany.

Chapter 4

The live music business as a business segment, general set for touring and its key personal is described in chapter four. It takes a closer look on touring activities before the COVID-19 crisis began, with a focus on events with an average attendance of 100 – 1000 customers. Two actual band cases close the chapter.

Chapter 5

Chapter five analyses various band and booking company strategies during the COVID-19 crisis. It also researches three band case studies as an alternative business concept. The cases successes and failures are summarized.

Chapter 6

In this chapter, alternative innovative technologies and service concepts are introduced and evaluated for its level of success and its potential during the COVID-19 crisis and the years to follow.

Chapter 7

Chapter seven focuses on the attractiveness, availability and of digital streaming and hybrid technology is scientifically analysed and hologram technology discussed as an alternative technology concept.

Chapter 8

This chapter summarizes all theoretical findings and the selection of success-factors leading to the empirical part of the master's thesis. It raises the question of success factors for digital live streaming events, recommendations, and future action steps to identify customer needs.

Chapter 9

The methods and tools used to identify customer insight, trends and how value is created for digital live events is core of chapter nine and provides the foundation of how a customer survey and focus group workshop is conducted to generate results leading to scientific recommendations.

Chapter 10

A detailed quantitative customer survey conducted in this chapter, validates the customer basic needs, performance and excitement attributes for a digital online heavy metal and rock live event. It identifies current customer challenges, obstacles, and reasons why customers are currently displeased with the current set-up. It also evaluates how often customers currently use this service and likelihood digital streaming events will remain relevant, once the COVID-19 pandemic has passed.

Chapter 11

In a customer focus group workshop, conducted in October 2021, the eight, current non-user participants evaluate through a brainstorming exercise, the customer journey map method and the 9 Windows Operator tool. The group identified their personal reasons, why they have not used a digital online heavy metal or rock event in the past and indicate which services would need to be provided in the future to create interest for such events.

Chapter 12

Chapter twelve addresses the four customer segments created based on the findings of the customer quantitative survey and the customer focus group workshop. In the second part of the chapter, the current product service level and overall customer satisfaction is assessed.

Chapter 13

The last chapter summarizes the findings of the master thesis, provides a recommendation for a course of action and a brief outlook into the future.

2 DEFINITIONS AND BACKGROUND INFORMATION

Understanding the challenges of the current live music industry, but also innovative business opportunities require a basic understanding of rock and heavy metal music, and how the musical genre translates to the world of live music. In the last ten years, the music industry as a whole and the live music industry, have witnessed radical changes in customer consumption behaviour. Physical album sales are being substituted by digital streaming and fans are no longer required to attend a concert or event in person, to take part of a live music experience.

2.1 When digital music changed the music industry

Over the last twenty years the music industry has been faced with a rapid change of the business caused by the steep rise of the digitalization of music. In the past, the primary focus was to sell as many CDs as possible, however the consumption rate has changed dramatically. Digital channels and distribution outlets like Spotify, Deezer and iTunes have heavily disrupted the traditional music business and are now major players in the music market, continuing to lead customers away from physical album sales and into digital consumption.

The 1990s were the golden age for recorded music with the CD and Vinyl's at the top of its life cycle, Mulligan reflects on the time before the drastic decline of physical record sales.² The music customers started abandoning the CD and turning to free file sharing. Streaming services grew rapidly and were a major hazard as "eating" the recorded music.³ This has been illustrated the rapid change in the music business. (Illustration 2).

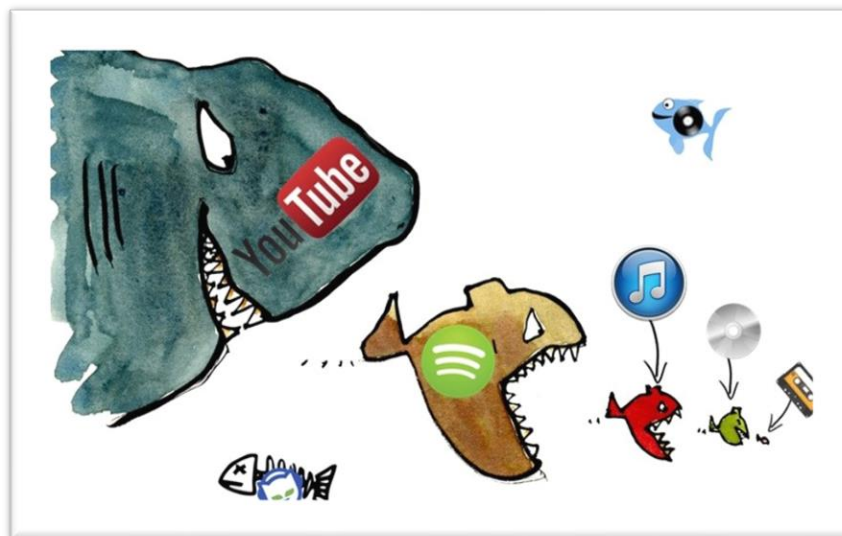


Illustration 2: "This is how streaming ate recorded music" (Resnikoff 2014), Online Source [30.08.2021]

² Cf. Mulligan (2010), Online source [31.08.2021]

³ Cf. Resnikoff (2014), Online source [31.08.2021]

Change was inevitable from distribution of music to a consumption era where “music fans expect music to be on tap, unlimited and whenever and wherever they want it”, Mulligan continues.⁴ Unfortunately, the music business was not fast enough to embrace digital, and online piracy boomed. In ten years (2000-2009) the recorded music revenues dropped to 42% of the starting point in the US and European markets, Mulligan explains further.

Masnick explains the changes from the perspective of the music industry, which has also been considered dying because of digitalization. He refers to his research report, which shows that on the contrary, the entertainment industry (including the music industry) has in fact grown 50% during they year’s 2000 -2010.

5

The amount of musical content is growing “at an astounding rate” and people are continually increasing their spending and consumption on entertainment. He suggests the challenge is not the business getting smaller but “it’s about the challenge of an industry getting larger, but within a new business structure. With the result of more content choices for consumers, more options for content creators, and more opportunities for businesses and artists to make money. According to Masnick, the global music industry value grew from \$132 billion in 2005 to \$168 billion in 2010.

A change of perception occurred when in 2012 for the first year since 1999 that the global music industry reached a slight increase and digital music was finally considered saving music and sought out as an opportunity instead of destroying it. Pfanner wrote in the The New York Times that new sources of revenue, including digital music in a variety of forms, grew enough to offset the continuing decline in CD sales.⁶ The record labels and music executives who used to see digital downloads only as the enemy, remembered from online piracy, now seemed to be ready to embrace the opportunities and what new digital business models could offer.⁷

In the years to come, an increased supply of online music fulfilled most customer needs, and enriched fans possibilities to freely decide which musical content format is desired. The fans are now more willing to pay for a service that meets their needs than the actual content itself. Customers are now able to to enjoy music from a diverse selection of formats, including physical product sales in form of CD, Vinyl, Deluxe Vinyl editions, diehard fan boxes as well as digital direct downloads and streaming formats.

Over the past two to three years, streaming has become an important source of revenue for the industry, and the decline of physical format and download sales continues.

2.2 Deeper meaning of live music

Live music cannot just be thought of as a multi-sensual communal experience, it is also a form of cultural affiance and tradition, with a history reaching as far back as the records of human art and culture.

⁴ Mulligan (2010), Online source [31.08.2021]

⁵ Cf. Masnick (2012), Online source [31.08.2021]

⁶ Cf. Pfanner (2013), Online source [31.08.2021]

⁷ Cf. ibid

“Music is a powerful social tool, beyond that of cultural and subcultural affiliations and identity making, or recreational practices.”⁸ “It arouses emotions, evokes memories and builds bonds—music touches people. While an abundance of enjoyment can be gained through listening to recorded music, live music changes and extends the rules of engagement by transforming the experience of music from that of a listener into that of an audience member. Thus “live-music augments repeatable individualized and deeply personal auditory experience of the solitary listener, and re-frames it and re-energizes it by transforming it into the communal experience with the capacity to engage all the senses at once.”⁹

2.3 Live Concert Streaming

A live streamed concert is defined by a live event, live concert, or musical performance is digitally transmitted and broadcasted in real-time. Typically, via the internet to distant audience members who can listen, watch, and directly interact using their smart phone, tablet, smart TV, computer, or various gaming consoles. Live streaming has the advantage that it can reach fans around the world, thereby allowing them to take part of an event, regardless of where they are geographically located. Fans who live in smaller or rural places or reside in countries with very little live touring activity get to see big bands and artists that do not usually come to their cities. Live streams allow bands to reach a global fan base, that exceeds any venue capacity. Ultimately, fans can benefit by gaining access to a wide range of programming which they can enjoy at the home, on the go, or wherever they prefer. Finally, concert live streaming can offer live music experiences for customers unable or unwilling to attend an event, particularly individuals with disabilities.

Since 2014, artists and tech companies have been emphasizing the value of concert live streaming as an untapped area and the next big thing for online music, according to Knopper.¹⁰ Even then, the technology was considered reserved for large events such as very successful artists or festivals.

When discussing the opportunities of a live streaming, the perceptions vary deeply. Some bands and booking companies believe that concert live streaming will, in the long run, decrease physical live attendance, which in the long run could damage the existing business models. On the other hand, some also see the potential of what concert live streaming can offer for the music fans and disagree that it is hurting ticket sales. Others, see the potential of live streaming, when the interactive fan can be engaged directly, by the band or event. The key to success, possibly, no longer lies with the actual streaming event, but to which extent the online customer can interact and participate with the streaming event, particularly with chat features and social media sharing.

Mazierska, Gillon and Rigg state in their book: “The Future of Live Music” that this is one important aspect greatly ignored by the entire live music industry. For many musicians and booking managers, long touring activities, particularly at small venues can be exhausting and demanding, with long periods of being away from home. For most musicians and booking managers a breakdown of personal relationships with loved

⁸ Bennett/Cresswell (2015), p. xii.

⁹ Bennett/Cresswell (2015), p. xii.

¹⁰ Cf. Knopper (2014), Online source [31.08.2021]

ones and family is the consequence, leaving feelings of loneliness and alienation and resulting in depressions.¹¹

2.4 Hard Rock and Heavy Metal

The rise of “Heavy Metal” as a sub-genre of “Hard Rock” developed in the early 1970’s arriving from the United Kingdom and the United States. Black Sabbath, Deep Purple and Led Zeppelin are considered the founding fathers of the genre, quickly followed by the arrival of bands such as Judas Priest, Motörhead, Aerosmith and KISS. Black Sabbath’s 1970 self-titled debut album can be considered the first classical heavy metal album, since the band used classic rock elements paired with a darker and gloomy music approach. The lyrics cover aspects of despair, and an anti-war attitude. However, they did not stop from touching more occult themes. Topics that even today are the key ingredients of many heavy metal albums.¹²

The 1980’s are often considered the high times of heavy metal since most songs were played faster and aggressively., Growl vocals were often added to support the key messages of the lyrics. With Iron Maiden, England produced one of the most influential bands as of today, followed by US bands Metallica, Slayer and Megadeth. Germany followed shortly with the arrival of Germany’s Speed and Thrash Metal bands Helloween, Sodom and Kreator.

The 1990’s era of hard rock and heavy metal saw the rise of a Scandinavian heavy metal scene in the form of Death, Viking, and Black Metal. The United States followed shortly with its own sub-genre in the form of Florida Death-, and Gore Metal.¹³

The turn of the century lead to a new wave of different rock and metal genres, this time most influenced by United States. Grunge, Cross-Over and Nu-Metal have all reach mainstream status. The world today would be less enjoyable without bands like Nirvana, Beastie Boys and Limp Bizkit.¹⁴

Today’s rock and heavy metal community and fan base is highly diversified. The evolution in this musical genre has seen more and more sub-genres. It is estimated that there are currently close to 100 sub-genres of rock and heavy metal, resulting-in a diverse fan base with a highly specialized taste in music. Metallica and Iron Maiden continue to play world-wide stadium tours and are, even after 40 years of existence, the most successful bands overall. For most other bands the challenges lie in remaining successful in a very limited music business segment. For that reason, touring with an average audience of 100 to 1000 per night at an event, is a reality these bands are living with. Fees are limited and most income is generated by the merchandise and physical music products that a band can sell.

It can be expected that many of the market leaders, in the world of heavy rock and heavy metal, will retire in the next ten years, perhaps shaking up the touring business entirely again.

¹¹ Cf. Mazierska/Gillon/Rigg (2020), pp. 84-85

¹² Cf. Wiebe (2018), p. 11

¹³ Cf. *ibid.* p. 12

¹⁴ Cf. *ibid.* p. 13

3 OVERVIEW OF THE MUSIC MARKET SEGMENT IN GERMANY 2021

Germany, France, and the United Kingdom represent the strongest music market in Europe. Most music territories in southern Europe have discontinued to service music retail outlets and lack systems collect reliable sales scans, the total number of albums sold per artist or album. In all Scandinavian countries except for Finland, the music market segment has transferred away from physical album or singles sales to digital streaming or album or single downloads. Even strong territories such as France and the United Kingdom, seldom generate trustworthy sales scans statistics, with exception of rock and metal labels that also function as a distribution company.¹⁵

Michael Spanring, head of worldwide distribution for Napalm Records, is aware of the challenge to generate valid total sales statistics and believes that Germany, Switzerland, and Austria provide the most accurate sales scans and revenue streams in the European music business. In Germany, Switzerland, and Austria all album-, single-, streaming- and digital sales, but also total revenue numbers, are listed, by product format, correctly in the GfK Entertainment (Growth from Knowledge) system. These are accessible by all music distribution partners and music labels. The GfK system is updated daily, and its statistics are reflected by the German album and single charts. Michael Spanring suggested using the German revenue and sales numbers as the benchmark to evaluate sales, revenues, and trends for Europe.¹⁶

Consequently, the following research findings are based on the findings in the music market segment in Germany.

3.1 Total sales generated in the live music segment for Germany

Since 2015, total sales in the live music segment have been rising continually, both in total ticket sales and event sponsoring. Ticket sales alone generated an income of 1,46 billion euro. In 2019 the value had risen already to 1,61 billion euro in sales. Since the beginning of the Corona pandemic the live music market has seen a noticeable collapse of all sales figures. Total revenue generated through ticket sales has declined in 2020 down to 566 million euro and total sponsoring incomes fell to 151 million euro. It is estimated that total revenue for the live music market will rise again in 2021 but won't reach the level of 2019, until at least 2022.¹⁷

In a typical business year, Germans highly prefer visiting a live event, particularly a concert. 48 million Germans would visit at least one live event per year. Live events account for 70 % of all revenue incomes in the German music business. In recent years, particular younger audiences preferred festivals over regular live events, particularly during the summer. The "BigCityBeats World Clube Dome" in Frankfurt (Hessen) was in 2019 the most visited festival with 120.000 attendees. Given the COVID-19 crisis, most live events, including concerts and festivals, had been cancelled in 2020. This reflects a decline in visitors of live events for that year, with a decline of -64%. Since March 2021, the live event business sector is discussing a variety of strategies to open the live event scene again. Recent opinion polls show that more

¹⁵ Cf, Spanring, Michael – Head of distribution worldwide, Napalm Records Austria – Online Interview, [04.10.2021]

¹⁶ Cf. *ibid.*

¹⁷ Cf. Statista (2021), Online source [01.09.2021]

than half of Germany's population would support, the proof of a negative corona test, wearing mask or a ban of all alcoholic beverages, to allow events to take place again. The overall strategy is to allow, step by step, attendees to return to an event.¹⁸

Total ticket sale revenue in billion euro for Germany:

2015: 1.464 billion euro

2016: 1.490 billion euro

2017: 1.525 billion euro

2018: 1.566 billion euro

2019: 1.611 billion euro

2020: 566 million euro

2021: 1.058 billion euro expected

2022: 1.604 billion euro predicted

2023: 1.657 billion euro predicted

2024: 1.711 billion euro predicted¹⁹

3.2 Digital Streaming Sales History for Germany

In 2020 digital music consumption has again seen an increase in the German music business segment with a total income of 1.276-billion-euro revenue generated. This shows an increase of 20.5 % compared to 2019, the highest total income achieved in any year. Compared to 2019, the 20,5 percent rise was lower than in the previous year with a total income rise of 33.3%. Within five years total digital revenue has doubled when compared to 604-million-euro revenue in 2016.

The growth in the digital music business segment has been driven by two factors. First, the audio streaming revenue income numbers rose by nearly 25 percent, reaching nearly 1.13 billion euro in total revenue. Compared to 2014, with a total achieved revenue of 108-million-euro, total revenue has risen tenfold. Secondly, video streaming and income generated from cloud-services has increased to 680 million euro in total revenue compared to only 510 million, in 2019. Comparing total income figures for the year 2020 for all digital income segments, video steaming share is still only 5.3 % of these incomes, leaving enough room for potential growth.

Direct digital full-length album and single downloads total income numbers continue to decline. Comparing total revenues results since 2008, direct downloads generated for the first time less than 100 million euro. For 2020, the total income of 76 million euro, reflects a decline of 24 percent to total revenues achieved in 2019.

¹⁸ Cf. Statista (2021), Online source [01.09.2021]

¹⁹ Cf. Statista (2021), Online source [01.09.2021]

Digital download income revenue earnings have halved since 2017 and currently only generate a third of the income compared to income numbers in 2015. In 2020, the total income generated by direct downloads accounts to only 6% of the entire digital music business segment.²⁰

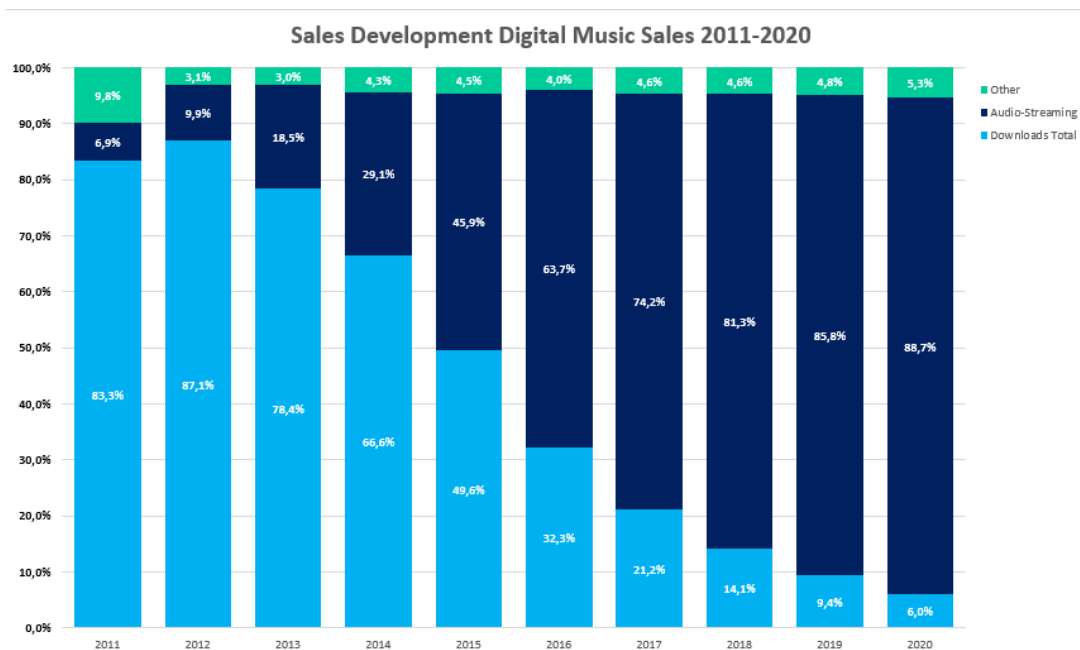


Illustration 3: Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated)

in Mio. €	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019 to 2020
Downloads Total	205	256	258	247	241	195	157	122	100	76	-24,0%
Downloads Singles	90	113	108	100	96	80	64	51	41	30	-26,8%
Download Album	113	140	147	145	144	113	92	70	58	44	-24,1%
Audio-Streaming	17	29	61	108	223	385	549	705	909	1133	24,6%
Other	24	9	10	16	22	24	34	40	51	68	33,3%
Total	246	294	329	371	486	604	740	867	1060	1277	20,5%

Table 1: Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated)

3.3 Sales Development physical music carrier for Germany

In recent years, the sales for vinyl sound carriers continue to rise, while sales revenue generated from compact disc carriers (CDs) continue to decline. CD sales were the dominant physical format preferred by customers in Germany until 2018, when audio streaming took the lead in total sales generated. Up until 2019, every third euro generated in physical sound carrier sales was accomplished through CD sales (29%). In 2020 only one fifth of euro generated results were from the sale of CDs (21.6%). Comparing total revenue figures between 2019 and 2020 it becomes evident that revenues dropped by 18 percent with total revenues declining from 472 million euro down to 387 million euro a year. CD sales have seen a downhill

²⁰ Cf. BVMI Bundesverband Musikindustrie (2021), Online source [01.09.2021]

trend in recent years, however a 17.9 % decline in total income can most likely be explained by taking into consideration that most retail outlets were closed in the year, due to the corona restrictions. CD sales remain with a market share of 21.6 % the second highest source of income in the German music market overall.

With some distance, vinyl sales are ranked 3rd with a 5.5% market share in the overall music market. Full length vinyl album sales have celebrated a real comeback since 2007 and account for close to 25% market share of all physical sound carriers. Between 2019 and 2020, full length vinyl sales grew by 24.7% thereby supporting the overall physical sound carrier business segment in Germany. The success of vinyl sales reflects positively on overall physical sound carrier incomes, resulting “only” in a loss of 11.7%, taking into consideration that most stationary record stores were closed in 2020. The renaissance of full-length vinyl sales has not lost its momentum during the year of the pandemic. On the contrary many customers many have offset the lack of live event experiences with the purchase of more nostalgic sound carriers.²¹

In 2021, the entire music industry in Germany, continues to grow and remains a highly attractive business segment, with an overall growth of 9 percent. However, regardless of the strong CD sales and the renaissance of full-length vinyl products, the physical music market continues to see a concerning decline. Comparing physical total album sales in 2020 with total sales in 2015, earnings have been reduced to less than half its number.²² Michael Spanring, head of distribution of Napalm Records argues that overall physical album sales would have declined further, if there would have been more competition from the live music industry. Customers, who typically would have invested some of their income in festival and event tickets, spent more money on physical music products to compensate for the lack of events. A trend, that in late 2021, but at the latest in 2022 could be reversed, then resulting in stronger declining physical album sales.²³ The continuing growth of digital streaming consumption indicates that most customers find satisfaction in the exploitation of digital concepts, and it can be argued that this also could lead to trend of the acceptance for digital, streaming and hybrid live events.

²¹ Cf. BVMI Bundesverband Musikindustrie (2021), Online source [01.09.2021]

²² Cf. BVMI Bundesverband Musikindustrie (2021), Online source [10.09.2021]

²³ Cf, Spanring, Michael – Head of distribution worldwide, Napalm Records Austria – Online Interview, [04.10.2021]

Overview of the music market segment in germany 2021

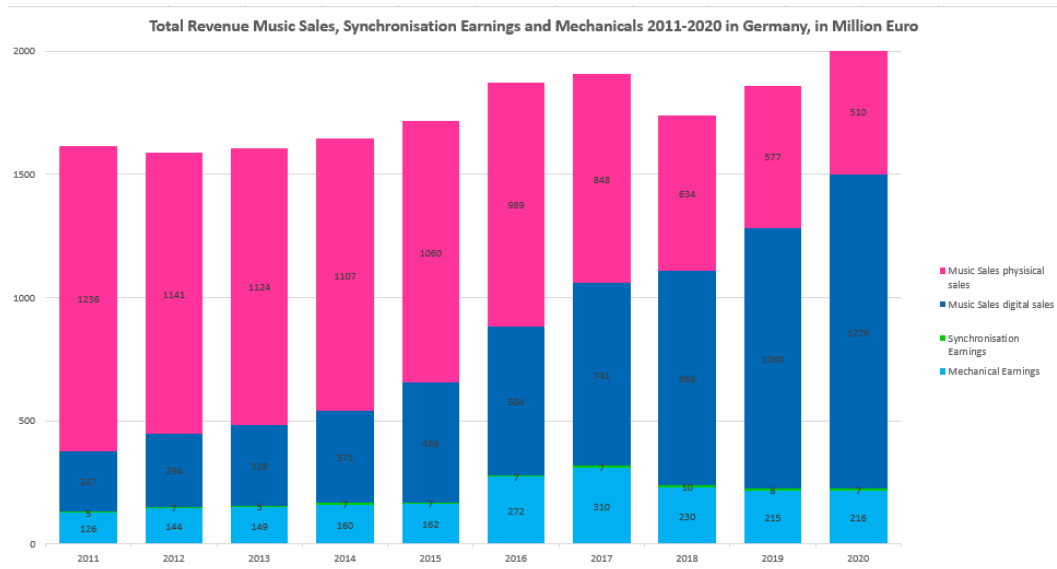


Illustration 4: Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated)

in Mio. €	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Comparison 2019	Spalte1
Music Sales / Physical / Digital	1483	1435	1452	1479	1546	1593	1588	1499	1637	1785	9,0%	↗
Music Sales physical sales	1236	1141	1124	1107	1060	989	848	634	577	510	-11,6%	↘
Music Sales digital sales	247	294	328	371	486	604	741	866	1060	1276	20,4%	↗
Synchronisation Earnings	5	7	5	7	7	7	7	10	8	7	-12,5%	↘
Mechanical Earnings	126	144	149	160	162	272	310	230	215	216	0,5%	↔

Table 2: Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated)

4 LIVE EVENTS AND TOURING

The business concept behind any rock and heavy metal tour, with the target to reach an audience of 100 to 1000 paying customers, unfortunately, is not as simple as calling up a live venue, reserving a day for a live performance and band members showing up in a touring-van on the day of the event. The following chapter provides a full understanding of key personnel involved in most touring activities and their primary roles. It provides an insight on contractual requirements needed for a live event. This chapter finishes with two band case studies to fully understand a complete live touring setting for an “average-size” rock and heavy metal band, before the outbreak of the corona crisis.

4.1 Definition and touring concept

People tend to believe, in a romantic fashion, that most bands simply jump in a van, and hit the road; playing shows as they go. Unfortunately, these times have passed if they ever existed at all.

Researching the touring set up of any band capable and interesting enough to gain an attendance anywhere in the range of 100 to 1000 paying fans a night, requires a highly organized team.

Any professional band will include three personnel that are key to ensuring that the event or tour will result in economic success:

Business Manager:

Most bands will at one point realize that they are unable to handle most business transactions themselves. The organization of live events are highly time consuming and do require the skill set of a business manager with a firm understanding of accounting.

The business manager can be considered the chief executive officer of any tour. His or her most important responsibility lies in being in constant exchange with the agent or booking company discussing a variety of touring possibilities. In most cases the booking process starts when a band has recorded a new album or new single, in some cases a digital single with a music video to support the album or single release. The business manager will, confirm an album release with a record label before a tour or event is confirmed. In many cases, the band will play an album release show on the day the new album is released. With the exception to the music market in Japan, all album releases occur on a Friday.

The album release show and following shows in the release week are strategically organized. For one reason, most record labels will release a digital single and new music video to give the album release one final push before the street date. Most promotional tools, including all print ads, social media and online marketing content see the most attention during the release week. The last single is often used as the radio single for a radio rock campaign mutually, giving both, album and tour the most attention possible. Since most bands are interested to see their new album release perform well in the official album charts, it is crucial that a band performs live as much as possible in the week starting with the release date, preferably in their home country. Live touring during the release week will provide bands with the opportunity to generate additional live album sales and will hopefully result in a higher album chart ranking.

The business manager analyses all touring opportunities once an album release date is agreed upon with a record label. The biggest decision is often whether a band is ready to play a headliner event or headliner tour. Most bands will be able to organize a headliner show in their hometown to celebrate an album release, gathering enough fans in the process. Choosing to do a headliner tour is the riskiest business decision. Being the headliner of an event or tour requires any band to carry the responsibility of the majority ticket sales needed to make an event a success.

A headliner tour has a few advantages. The business manager and its booking agent can negotiate the best possible performance fee for the band with all venues the band intends to play. The business manager and can be free to determine the touring routing, cities and venues played. Being the headliner might allow the business manager to negotiate for better merchandise sales conditions.²⁴ This could mean a lower a fee the band must pay to the venue for items sold, and a larger merchandise selection available for fans when more sales space is provided.

A third advantage of a headliner tour occurs when the band manager can freely negotiate and select which bands will join the tour as opening acts, support, or direct support acts. In some cases, a co-headliner can be selected. Being able to select the band supporting the headliner can be a crucial aspect to the success of the event or tour. Some supporting bands can increase overall ticket sales, perhaps not for every show but in some cities. For example, having a band from the United Kingdom as a support band can increase ticket sales in the British market when the band is playing a European tour.

The fourth advantage to the business manager of a headliner event or tour can be, that he or she is able to request "buy-on" fees from supporting acts. Buy-on fees are cost a band is willing to pay the headliner to be selected to join the tour. Buy-on fees are frowned upon in the live music business, but get negotiated on almost all tours, since they are a secure source of income to the headliner and booking agent.

Being the headliner of an event or tour typically has the advantage that the music press and the record label will focus more heavily on supporting the band with touring advertisement. Most music press will prepare a live review of the event which will further help to raise more awareness for the band, and potentially increase album sales. Most record labels will provide some promotional set-up to help the business manager coordinate tour interviews, press, and guest accreditation, fan give-aways and meet and greets.

One disadvantage for the business manager of the band is that most record labels will not provide any financial fundings for headliner tour engagements. Typically, most record labels will provide a full or partial recoupable tour support for supporting tour under the condition that the band is playing at least 10-14 shows in a row and most of the cities played are primary markets. A primary business market is a territory that usually has high album sales. For the most part these are Germany, Austria, Switzerland, United Kingdom, France and the BeNeLux (Belgium, Holland, and Luxemburg) as of late Poland and the Czech Republic are now often added. Some may wonder why the Scandinavia countries have not found its way on the list of high market territories. The answer is straightforward. Except for Finland all other Scandinavian countries have all but abandoned the market for physical album sales. Over 70% of music sales occur in form of

²⁴ Cf. Herstand (2019), p. 178

digital and streaming incomes. Record labels fully understand the advantages of digital and streaming revenue streams; however, tour support is today still tied to actual physical album sales. It can be debated whether this business setup will change over the next few years.

Further responsibilities of a business of a band manager include organizing band rehearsals, hiring band members and controlling all finances.²⁵ The band manager will often be responsible for hiring additional employees for the tour these include: a driver, sound technician, light technician and often someone to organize, oversee and sell all merchandise items on tour. If the services are not handled directly by the booking agent and record company, the business manager will also be responsible for coordinating tour advertisement, social media promotion and some direct band advertisement. Finally, if not completed by the booking agent directly his or her responsibilities include hiring a tour bus or nightline, book flights and ferries, in addition to loading truck, rental vans and hotels.²⁶

Booking Agent:

The second most important person for every live event or full tour set-up is the booking agent or booking company in general. Along with the business manager, the booking agent's main responsibility is to sell the band to venues and festivals as client. Most agents will point out the band's album release history, label support, album chart performance and most importantly the touring history. Where was the last tour, what attendance was achieved, what social media was reached and past-album sales?

Like a business manager, the booking agent's talent includes being connected with as many record labels and management companies as possible to identify touring opportunities for the client. Band "packages" need to be evaluated to ensure that as many fans as possible will be attracted to the event or tour. One disadvantage of packaging very similar artists is that they simply attract the same fans. These fans would have seen value in the event anyway, and thereby missing opportunities for additional ticket sales by adding a new and different customer segment. A diverse customer segment appearing at an event creates future opportunities to increase the bands own customer base.²⁷

In recent years, ticket sales have started earlier and earlier, sometimes even a year before the event. Most fans are aware that a show won't sell out quickly and tickets will be available from the booking agent. Consequently, the ticket sale process takes much longer and requires frequent reminders to potential customers, through print, online and social media marketing to market the event or tour.²⁸

One key ingredient of the success of an event or tour is, setting the ticket price. There are different strategies that need to be evaluated. Setting the price too low may increase the number of tickets sold but may also reduce the profit margin. A low price of a ticket may sell out the event faster but may give customers and venues the impression that the band is still working on a low level. This may sound irrelevant, but the music business is an entertainment industry and band image are its highest merit. Setting the ticket price too high,

²⁵ Cf. Passman (2019), p. 414

²⁶ Cf. Herstand (2019), p. 180

²⁷ Cf. *ibid.* p. 181

²⁸ Cf. Passman (2019), p. 415

will put the band at risk that too few tickets will be sold altogether. Since there is an oversupply of festivals in Europe, this allows fans to watch many live acts at the same time and often for ticket prices between 50 and 200 euro per festival. There is ample pressure to reduce ticket prices. It all depends on the band's standing in the music industry, past touring success, and uniqueness of the event. Did the customer receive added value from the last event in form of a special show, stage setting, a once in a lifetime track list or good band packaging?

Some booking agents will offer "early-bird" discounted tickets early, often in combination with a merchandise item. This serves to generate early sales and an early reassurance that a certain percentage of customers will commit to attending the show. Later ticket bundles could have higher prices and pend the customers own decision if an event is desirable, and a customer need can be fulfilled. Both business manager and booking agent typically decide on different ticket sales strategies mutually. Some see an advantage in limiting the initial number of tickets that can be sold, sometimes only 10 percent of all tickets. Later, when the event is getting closer more tickets become available and some are kept for the day of the event. Other business strategies have the primary goal to sell as many tickets as possible in the fastest time.²⁹

Tour Manager:

Tour managers, as the name implies have responsibilities while the band is performing an event or a tour. Since most business managers are unable to join a tour and are not experts in the day-to-day business of touring, they pass the responsibility to a tour manager. Most tour managers will manage the entire tour, meaning they are the decision maker for all bands entire crew and are the middleman or middle woman between band and crew and the venue management. Overall, they are responsible that a show runs smoothly, that hotel reservations are confirmed, and airline or bus tickets are booked. Show fees are collected after the show and sold merchandise is accounted for by the tour manager.³⁰

Mainstream bands with an event attendance exceeding 1000 people a night will often be managed by a promoter. In the rock metal live music industry Live Nation and AEG are the most well-known companies who purchase entire tours, rent the venues, handle promotion and ticketing and are responsible for all expenses. For this research, they are not relevant, but should be mentioned nevertheless.³¹

4.2 Live Event and Touring Venue Performance Agreement

Having considered, in the last section, the most important individuals of each live and tour event, it is of benefit, to have a more detailed understanding of a standard venue performance agreement between a booking agent and the venue who is organizing an event.

²⁹ Cf. Passman (2019), p. 418

³⁰ Cf. *ibid.*, p. 420

³¹ Cf. *ibid.*

Most venue agreements will negotiate the following terms:

- A detailed understanding on the names of both parties negotiating the agreement. In this case, the management or owner of a location and the booking company.
- The legal jurisdictions relevant to the agreement.
- The date when the agreement has been negotiated and when all terms have been agreed upon.
- The exact day, time, and location where the event is to take place.
- A listing of all musicians that will perform on the day of the event.
- The track list, style of music and which instruments are involved in the performance.
- The exact performance fee and the terms of payment. Often, a booking form will receive a small fee upfront and the remainder of the payment, directly after the performance.
- Terms and fees if a band is cancelling the event.
- Terms and fees if the venue is cancelling the event.
- Fees and terms if an event need to be postponed or its location changed.
- An “act of god” clause.
- A detailed list of the transportation rider, housing opportunities, equipment provided.
- Required back-stage area, food and drinks, number of towels and any other special needs.³²

4.3 Touring in 2019: The business model of European Tours with a customer capacity of 100-1000 people

The typical business model or set-up, analysed in this section, summarizes some of the last European tours that have occurred before the COVID-19 crisis stopped all touring efforts in early 2020.

Given the recommendation of an expert, some delimitations have been designed on purpose, to allow for a better understanding and focus, on how the business and touring process previously worked for most rock and heavy metal bands in Europe, before the COVID-19 crisis started. Bands and booking companies that typically work with an average attendance of less than 100 attendees have been purposely omitted; they are considered “leisure bands” Bands with an average attendance mostly above 1000 customers per show and night, are colloquial considered, “mainstream” rock or metal acts and incorporate an entirely different business strategy, with promoters purchasing entire tours at their own risk.³³

³² Cf. Stein (2021), pp. 146-150

³³ Cf, Vandeven, Matthias – Business Manager and owner Sound of Liberation – Online Interview, [30.08.2021]

To provide the most current results actual booking agents were asked directly to describe the touring business strategy in 2019. Booking companies and bands were selected that could prove to have completed at least ten consecutive shows through at least five European countries.

The following topics were included in the written interviews:

- Exact tour routing including the date, country, city, and venue played
- Capacity of the venue and possible ticket sales
- Number of tickets sold, pre-order and on the day of event
- Demographics of the attendees
- Success factors during and after the event
- Challenges encountered during and after the event
- Opportunities for future events

4.3.1 Example 1: A traditional German Heavy Metal Band

The first touring event describes the last European tour of a traditional Heavy Metal band in the year 2019 before the start of the COVID-19 pandemic. The band along with “Running Wild” and “Rage” was founded in 1980 in Germany, and is considered, next to Helloween, to be the leading power metal band coming out of Germany. In the more than forty-year history of the band, they have successfully released over twenty studio albums. The album released in late 2018, leading to the European tour sold close to 15,000 albums on CD and around 2,000 albums on vinyl, worldwide. The album performed well on the German and Swiss official album charts. In Germany, it reached a top 25 album chart success and remained in the album charts for one week.

The table below chronicles the country and cities played on the European tour. Fourteen out of twenty-three shows were played in Germany, supporting the notion that the primary market for the band is Germany. Most booking companies will organize at least one show in each of the key market the band is trying to succeed. Here, one show in London to cover market for the entire United Kingdom.

Country	City	Capacity	26.11.	03.12.	10.12.	17.12.	24.12.	31.12.	07.01.	14.01.	21.01.	28.01.	Day of Event	Total Tickets sold	Venue capacity utilized
Germany	Hannover	unknown	141	179	204	210	252		276	325	325	325	53	378	N/A
Germany	Andernach	600	118	122	127	150			241	346	346	346	30	376	62,70%
Swiss	Pratteln	1600	113	127	145	171		212	271	369	369	369	64	433	27,10%
Germany	Munich	550	184	187	206	218		271	280	332	332	332	21	353	64,12%
Germany	Aschafbg.	650	106	111	115	129			262	305	310	310	28	338	52,00%
Germany	Saarbr.	650	60	74	80	87			140	194	216	216	38	254	39,01%
Germany	Bochum	800	191	202	214	225	262		295	369	376	376	25	401	50,13%
Germany	Glauchau	750	188	209	229	266			364	432	490	490	57	547	72,93%
Germany	Neuruppin	900	205	212	239	248			298	326	345	345	28	373	41,44%
Holland	Rotterdam	350	55	62	64	65	72		100	111	146	146	23	169	48,29%
Germany	Hamburg	unknown	134	154	170	192		225	239	263	287	321	14	335	N/A
Germany	Berlin	550	137	149	171	196			248	277	310	322	36	358	65,01%
Germany	Bamberg	400	97	115	130	146	166		198	232	273	334	18	352	88,00%
Germany	Regensb.	1800	90	99	110	116		139	167	191	228	315	49	364	20,22%
Germany	Memmin.	800	78	91	111	128	146	167	187	208	236	272	40	312	39,00%
Germany	Ludwigsb.	1000	86	94	110	132			174	183	194	292	38	330	33,00%
France	Paris	450	87	92	104	112			147	159	180	225	12	237	52,67%
England	London	500	90	100	108	115	118		138	164	175	223	17	240	48,00%
Belgium	Vosselaar	500	27	32	35	38	41	50	53	74	89	95	24	119	23,80%
France	Lyon	500	57	60	63	67			88	100	120	132	5	167	33,40%
Spain	Bilbao	700	8	9	10	10	12		23	42	53	108	14	205	29,29%
Spain	Madrid	600	20	22	28	28	33		62	79	102	143	25	252	42,00%
Spain	Barcelona	800	22	22	25	25	31		55	66	76	110	36	240	30,00%
														Average Capacity	45,82%

Table 3: Band Example 1: European Tour Routing and Ticket Sales 2019 - private source, adjusted

On January 11th, 2019, the band played their first show in Hannover, Germany and completed the tour on February 3rd, 2019, in Barcelona, Spain. It is no coincidence, that the ticket pre-order process started in the end of November 2018, about two months after the studio album was released.

Comparing the capacity of the venues, which were sought out and negotiated by the booking company, it can be said that the show in Bamberg, Germany had the highest capacity rate with 88 percent capacity. The lowest capacity rate of all shows, occurred in Regensburg, Germany with an attendance of only 20.22 %. The average capacity rate of the entire tour was 45.82 %.

Table 4, shown below provides the exact touring routing with all venues listed and the travel distance between each show. Having a good tour bus, nightline and professional bus driver are critical for the success of any tour or event.

Live Events and Touring

SHOW	DATE	COUNTRY	CITY	VENUE	VENUE ADDRESS	TO NEXT VENUE
	11/01/2019	GERMANY	Cologne			300 Km
1	11/01/2019	GERMANY	Hanover	MusikZentrum	Emil-Meyer-Straße 26, 30165 Hannover	375 Km
2	12/01/2019	GERMANY	Andernach	JUZ Live Club	Stadionstraße 88, 56626 Andernach	425 Km
3	13/01/2019	SWITZERLAND	Pratteln	Z7	Konzertfabrik Z7, Kraftwerkstrasse 7, 4133 Pratteln	400 Km
4	14/01/2019	GERMANY	Munich	Backstage	Reitknechtstraße 6, 80639 München	360 Km
5	15/01/2019	GERMANY	Aschaffenburg	Colos-Saal	Roßmarkt 19, 63739 Aschaffenburg	220 Km
6	16/01/2019	GERMANY	Saarbrücken	Garage	Bleichstraße 11, 66111 Saarbrücken	340 Km
7	17/01/2019	GERMANY	Bochum	Zeche	Prinz-Regent-Straße 50-60, 44795 Bochum	500 Km
8	18/01/2019	GERMANY	Glauchau	Alte Spinnerei	An der Spinnerei 8, 08371 Glauchau	340 Km
9	19/01/2019	GERMANY	Neuruppin	Kulturhaus Neuruppin	Karl-Marx-Straße 103, 16816 Neuruppin	715 Km
10	20/01/2019	NETHERLAND	Rotterdam	Baroeg	Spinozaweg 300, 3076 ET Rotterdam	500 Km
OFF DAY 21/01/2019						
11	22/01/2019	GERMANY	Hamburg	Markthalle	Klosterwall 11, 20095 Hamburg	300 Km
12	23/01/2019	GERMANY	Berlin	Lido	Cuvrystraße 7, 10997 Berlin	450 Km
13	24/01/2019	GERMANY	Bamberg	Live Musik Club	Obere Sandstraße 7, 96049 Bamberg	170 Km
14	25/01/2019	GERMANY	Regensburg	Eventhalle-Airport	Ernst-Frenzel-Straße 16, 93083 Obertraubling	250 Km
15	26/01/2019	GERMANY	Memmingen	Kaminwerk	Anschützstraße 1, 87700 Memmingen	180 Km
16	27/01/2019	GERMANY	Ludwigsburg	Rockfabrik	Grönerstraße 25, 71636 Ludwigsburg,	600 Km
17	28/01/2019	FRANCE	Paris	Petit Bain	7 Port de la Gare, 75013 Paris	476 Km
18	29/01/2019	UNITED KINGDOM	London	The Underworld	174 Camden High St, Camden Town, London NW1 ONE	475 Km
19	30/01/2019	BELGIUM	Vosselaar	Biebob	2350 Vosselaar	850 Km
20	31/01/2019	FRANCE	Lyon	CCO	39 Rue Georges Courteline, 69100 Villeurbanne	900 Km
21	01/02/2019	SPAIN	Bilbao	Santana 27	Polígono Industrial Santa Ana, Telleria Kalea, 27, 48004 Bilbo, Bizkaia	400 Km
22	02/02/2019	SPAIN	Madrid	Copernico	Calle de Fernández de los Ríos, 67, 28015 Madrid	650 Km
23	03/02/2019	SPAIN	Barcelona	Razzmatazz 2	Carrer dels Almogàvers, 122, 08018 Barcelona	1400 Km
	04/02/2019	GERMANY	Cologne			

Table 4: Band Example 1: European Tour Distance Travelled

In detailed conversations with the business manager responsible for booking this European tour, many insights were given. In Germany, ticketing, and ticket prices differ widely. In the northern and eastern part of Germany an average ticket price of 23 euro is competitive. A higher priced ticket would reduce attendance by 10% per show. In the western and southern part of Germany an average ticket price of above 30 euro per ticket has proven successful. The highest ticket prices were offered in Munich with an average ticket price of 32 euro. Customers here are less sensitive to higher prices and the purchasing decision is less affected by price. By raising the price by five euro per show only 6% of fans would be inclined not to purchase.

Ticket prices on the day of event, are one to three euro above the pre-order purchasing price. Two thirds of tickets are being sold in the pre-order phase and the remaining one third on the day of the event. Weekend shows, except for Sundays, will see higher customer ticket sales numbers, compared to shows during the week. For all events, booking companies will schedule the routing accordingly. The most important markets with the largest venues and highest customer attendance expectations will always be scheduled for a Friday or Saturday. Often, Sundays are used for “filler” shows and smaller venues, in less significant markets.³⁴

On this tour, around 70 percent of all customers are male, and 30 percent are female. Ten percent of all customers are older than 18 years of age. 50 percent of all customers are above the age of 30 years and 25 percent are already older than 40 years of age, leaving the customer base with an average age older than 50 years of age with 15 percent. It can be recognized that the 40-year history of the band reflects the customer age segmentation of the customer base.

According to the business manager of booking, the biggest challenge to make a European tour a success, is to ensure that all equipment transported will reach each venue undamaged. The biggest factor of uncertainty is the health of all band member and crew during the entire course of the tour.

³⁴ Cf. Booking Business Manager (anonymous) written documentation. [25.08.2021]

The overall success of a tour highly depends on the experience level of the venue crew and how well the technical team for sound and light work together. The touring experience of the band also plays a role. The booking business manager explains, “With an inexperienced backline or technical crew, an incompetent bus-driver or a challenging support band, mistakes will occur rather quickly. By trying to compensate for one mistake, more mistakes will happen, turning into a domino effect of mistakes, turning the tour in a failure.”³⁵

The January 2019 European tour was the last tour completed. A later scheduled European Tour was postponed to January 2021 and later further postponed to early 2022. No digital or streaming shows have been played in the last two years. The band utilized the time during the COVID-19 pandemic to record and release one full length studio album and one solo-album featuring two band members of the main band.

4.3.2 Example 2: The Irish Post-Rock Band God Is An Astronaut

The Irish band, God Is An Astronaut is a highly international successful Post Rock band.



Illustration 5: Official Promotional Photo God Is An Astronaut – Source Napalm Records

Post Rock describes a musical style that is very experimental and for the most part instrumental. God Is An Astronaut has no vocalist, and the musical style is a combination of rock and heavy rock instrumentation with “spacey” electronical instrumentation which also includes the utilization of keyboards and synthesizer.

The band from County Wicklow was founded in 2012 and has released ten full length studio albums. The last studio album “Ghost Tapes #10” was released through Napalm Records in February 2021. With the new album release the band has sold so far around 5000 CDs and close to 3000 Vinyl copies. It has also received similar income through digital and streaming purchases. In Germany, the album successfully entered the German full length album charts at number 67 and remained in the Top 100 charts for one week.

³⁵ Cf. Booking Business Manager (anonymous) written documentation. [25.08.2021]

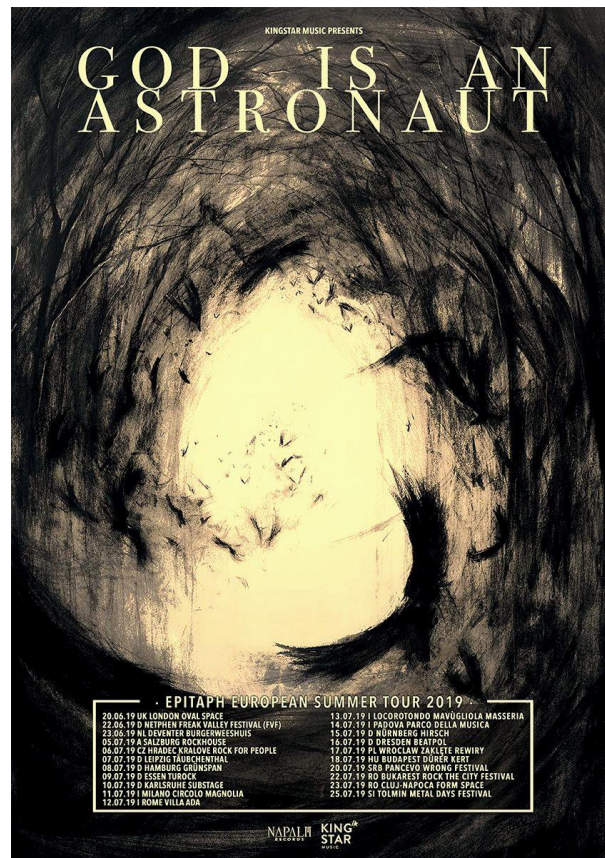


Illustration 6: God Is An Astronaut European Touring 2019, Source Band

In the summer of 2019, Kingstar Booking, a successful booking agency from Hamburg Germany organized a run of twenty consecutive shows throughout Europe. The first show took place June 20, 2019, in London, and the tour concluded with the “Tolmin Metal Days” festival in Slovenia. Germany and Italy are the key markets, where 50 percent of all shows were played, reflecting the strong album sales in these territories.

Table 5 shows the capacity and venues, Kingstar Bookings had successfully booked for the European tour. Capacity numbers for all festivals can be overlooked since they reflect the capacity of all festival attendees and cannot directly be attributed to God Is An Astronaut. As part of the bands business strategy, the booking company books shows near to one another to avoid long and unnecessary driving distances. Tour busses and nightliner are avoided to reduce expenses. Band members will share the driving responsibilities, with a small stipend given for fuel and expenses. Ferry and Eurotunnel fees get calculated as a separate expense.³⁶

³⁶ Cf. Niels Kinsella: Written Interview: [01.09.2021]

#	DATE	CNTRY	CITY	VENUE	CAP
1	20-Jun-19	UK	London	Oval Spec	900
2	22-Jun-19	Germany	Netphen	Freakvalley	5.000
3	23-Jun-19	Netherlands	Deventer	Burgerweeshuis	450
4	06-Jul-19	Czech Republic	Hradec Kralove	Rock For People	25.000
5	07-Jul-19	Germany	Leipzig	Täubchenthal	1.200
6	08-Jul-19	Germany	Hamburg	Grünspan	900
7	09-Jul-19	Germany	Essen	Turock	500
8	10-Jul-19	Germany	Karlsruhe	Substage	1.000
9	11-Jul-19	Italy	Milano	Circolo Magnolia	1.200
10	12-Jul-19	Italy	Rome	Villa Ada	1.200
11	13-Jul-19	Italy	Locorotondo	Mavùgliola Masseria	800
12	14-Jul-19	Italy	Padova	Parco Della Musica	1.200
13	15-Jul-19	Germany	Nürnberg	Hirsch	700
14	16-Jul-19	Germany	Dresden	Beatpol	800
15	17-Jul-19	Poland	Wroclaw	Zaklete Rewiry	1.000
16	18-Jul-19	Hungary	Budapest	Dürer Kert	850
17	19-Jul-19	Day Off			
18	20-Jul-19	Serbia	Pancevo	Wrong Festival	2.500
19	21-Jul-19	Day Off			
20	22-Jul-19	Romania	Bukarest	Rock The City Festival	65.000
21	23-Jul-19	Romania	Cluj-Napoca	Form Space	800
22	24-Jul-19	Day Off			
23	25-Jul-19	Slovenia	Tolmin	Metal Days Festival	15.000

Table 5: Tour Routing God Is An Astronaut 2019, Source Band

God Is An Astronaut follows a detailed business strategy, explains Niels Kinsella, founding member of the band. The European Tour generated close to 80,000 Euro income by performing, not counting any merchandise incomes or additional sponsoring fees. The ticket pricing strategy is set to sell as many tickets as possible in the pre-order purchase. Ticket sales on the day of the event account for 12% of the total sales. The average ticket is priced between 20 and 25 euro, regardless in which country the band is performing. The band prefers an audience capacity of 300 – 500 attendees per night and show, with capacity utilization rate of 60 percent. The low utilization rate is accepted, and larger venues are purposely booked to allow for a bigger stage production, to guarantee a perfect live show. Regardless, the capacity most weekend shows are sold out in the process. The band has seen attendance reach capacities in London and Dublin of more than 1000 tickets sold, and in 2019 performed with an attendance of 4500 paying customers in Moscow.³⁷

70% of the attendees are male, and 30 percent are female. In Russia, attendance by gender is 50% each. One percent of all customers are younger than 18 years of age, 11% is between the age of 18 and 21, 23% between 28 and 34, 21% between 35 and 44, 8% between 45 and 59 and finally 2% of all attendees are over the age of 60. The attendance by age breakdown supports, that God Is An Astronaut attracts a very diverse fan-base. The high rate of younger fans reflects the high digital album sales and streams.

³⁷ Cf. Niels Kinsella: Written Interview: [01.09.2021]

Live Events and Touring

God Is An Astronaut has not played any shows since 2019. However, the band has streamed a full live show on August 14th, 2021, funded by the Department of Arts and Culture in Ireland. The first four live shows in Ireland for the middle of September 2021 in Ireland are confirmed without any Corona restrictions. A continental European tour is currently scheduled to take place in the beginning of March 2022.

5 TOURING ALTERNATIVES DURING THE COVID-19 CRISIS

The COVID-19 pandemic led to a complete shut-down for all live touring events in both Europe and the United States of America. The live music industries have seen touring announcements for the fall of 2020 that later in the year had to be re-scheduled for the Spring of 2021. By the middle of 2021, most booking companies had moved tours to 2022 altogether. There have been sporadic events and minor touring activities happening, but they have been overshadowed by numerous cancelations due to musicians and crewmembers falling ill with Corona and being forced to cancel all remaining shows. To allow some touring to take place, most bands intend to play a couple shows in their home countries. Traveling and touring in Europe is nearly impossible due to numerous, and varying traveling restrictions and quarantine laws on a regional, national, and international level. Booking companies are facing numerous economic challenges with show cancelations always being imminent, and expensive 2G and 3G government regulations. Most touring profit margins depend on strong ticket sales, which make touring in the pandemic impossible.

Economical aspects in form of touring fees, sponsoring fees and merchandise sales are all crucial for the survival of any band and booking company, however there is also one other aspect to consider. Live events are a key promotional tool to maintain or raise the status of any band. Without touring or activities that mirror touring, bands will see negative consequences in future album sales and reduced social media and online presence.

Many bands have moved to online streaming, either pre-recorded or live, and other alternative to hold against these negative consequences.

5.1 Digital Streaming of live events

The technical possibilities and economic opportunities for digital live streaming have been in dispute for well over a decade. In Jeremy Wade Morris article "Artist as Entrepreneurs, Fans as Workers", written in 2014, supporting the overwhelming feeling, that digital streaming would create a disadvantage to musicians that would not be wanted by any musicians. Where in the past, artists were simply musicians, and their sole responsibility was to provide a great live performance, a new digital live streaming business would put them into positions like record labels and business managers. Artists would be required to run a business, rather than just being the performer. Morris himself, does not deny that digital streaming tools could create an advantage for artists but argues that bands alone would carry all the burden.³⁸

Since the beginning of the COVID-19 pandemic, artists and booking firms have tried eagerly to establish new forms of digital entertainment. The preferred solution was the idea of online events. Concerts and even festivals were announced as livestreams events and made available, typically free of charge, on platforms like Facebook, Vimeo, and YouTube. The overall challenge remained, since everything that has to do with the event location, does not exist in a digital streaming environment, particularly without an actual euphoric audience. At live events, people want to dance, clap, sing and laugh together and have a

³⁸ Cf. Morris (2014), Online source [03.09.2021]

drink. It is possible, to invite friends over, to an online concert at home. However, it won't feel any different than a TV evening with a live recording on DVD.³⁹ "The live atmosphere, the group experience and the interaction between the artists and the audience cannot be transmitted. Just think of the classic concert rituals like clapping, trampling, shouting or - loved and hated - the inevitable waving of lighters during the quieter notes."⁴⁰

The great advantage for the opportunity of digital streaming events lies in the technical achievements accomplished over the past few years. The digital infrastructure can be provided in a highly resilient and reliable manner. Most bands and booking companies will have affordable and genuine access to various internet and WLAN solutions that give event organizers a great basis for event management opportunities and could give customers great new event experiences. Central data availability, digital streaming servers (mainly Youtube, Facebook and Vimeo), synchronisation of information in real time and automation technologies are excellent tools for each digital streaming event.⁴¹

The COVID-19 crisis may serve as the catalyst needed to help the live music event industry to make a quantum leap in digitalization, that may have taken another decade to develop and find acceptance.⁴²

5.2 Digital Streaming as a strategy to win back customers

One aspect to take into consideration, is the assumption that the entire live music industry will eventually return to the business set-up before the COVID-19 pandemic began. Booking companies fade out all thoughts, that customers' needs, and moods could entire change once the pandemic ends. Can the live music industry expect that all customers will return to performance venues to enjoy an event?

The US research company, Performance Research, reputable in sports and event research conducted one of the first impact studies for the time after COVID-19, along with the Full Circle Research company. The research, conducted in March 2020, included 1000 participants and analysed customers perception and impact on live music, entertainment, and sports events, both indoor and outdoor. The results give a concerning outlook for the live music industry and may further put the focus on hybrid music activities.⁴³

The research asked, how likely would customers be to return to live events after COVID-19 if social-distancing restrictions would no longer be required. Respondents were asked, if they would be inclined to attend the same number of events, perhaps even more to make up for the time, live events were not accessible, or if generally less events, compared to the time, before the Corona outbreak. Illustration 7, shown below, provides an overview of the results:

³⁹ Cf. Eventnet, Online source [03.09.2021]

⁴⁰ Cf. Ibid.

⁴¹ Cf. Eventnet (2021), Online source [03.09.2021]

⁴² Cf. Ibid.

⁴³ Cf. Performance Research (2020), Online source [04.09.2021]

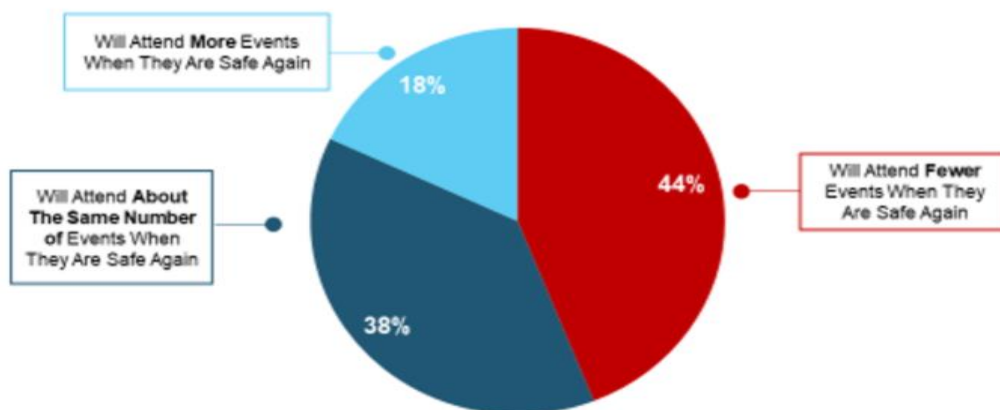


Illustration 7: Live events gatherings after Corona, source Performance Research

Based on the findings, 38 percent of the participants asked would continue visiting events in general in the same fashion as they did so in 2019. The Corona crisis has not limited their desire to enjoy live events as a leisure event, nor do health concerns, play a dominant factor. The lowest number of participants, with 18 percent, responded that they would be inclined to visit more live events. The most dominant factor could be a high desire to enjoy more live events due to its shortage of live possibilities. A concern for the live event industry could be, that nearly half (44 percent) the participants asked, would visit fewer live events in the future.⁴⁴ Unfortunately, the research conducted gives no further insights, on which age groups were taken into consideration. For the rock and heavy metal live music industry, concern could be lighter if the findings suggest that most participants asked are over the age of 50 years old and customers younger than 50 years of age, would share fewer concerns to visits live events in the future. The live event expert, Matthias Vandeven interprets the US research findings as very much realistic and representative for the European music market⁴⁵

The findings in, illustration 8 summarise, that the live music event industry will continue, to take the longest time, to return to the level of business generated, before the COVID-19 crisis. Evaluating the results to other live events, mainly visits to outdoor parks and beaches, zoos, museums and exhibitions, theme parks and sport events, both indoor and outdoor, major indoor live music events will face significant more effort and time for customers to return. Live music outdoor events, typically considered safer, taking social-distancing regulations in consideration, do not necessarily benefit much, compared to indoor music events. 48 percent of all participants responded that their willingness to return to live outdoor music events has been reduced. These range, from waiting a couple month to the extreme, not having a customer need again. For outdoor sports events, 44 percent of fans would wait a couple of months or choose not to take part indefinitely. Unsurprisingly, for indoor live music events, more than half, with 56% of participants asked, expressed their preference to wait for a couple months to the extreme,

⁴⁴ Cf. Performance Research (2020), Online source [04.09.2021]

⁴⁵ Cf. Vandeven, Matthias – Business Manager and owner Sound of Liberation – Online-Interview, [30.08.2021]

not attending ever again. ⁴⁶ Both research results, are concerning to the future of the live music event industry. Outdoor live music events, with a slightly better outlook, face the challenge of seasonal limitations for that business concept.

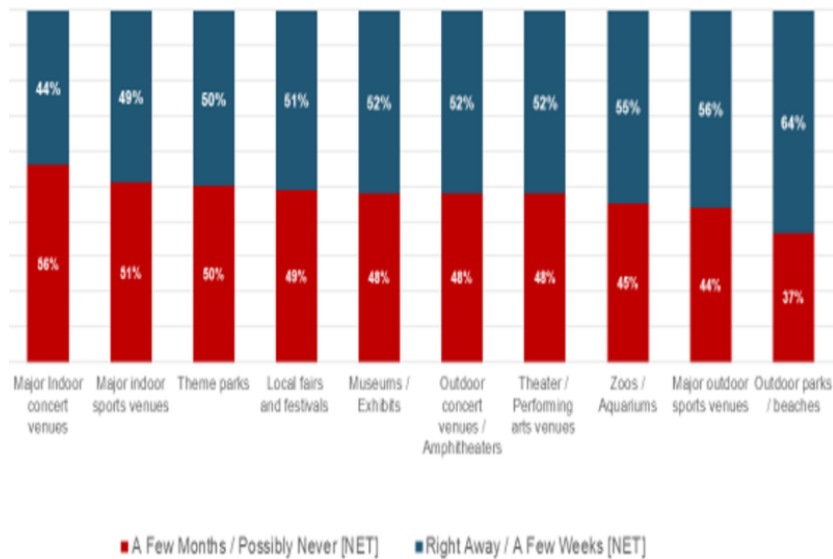


Illustration 8: Events split by category and indoor / outdoor, source Performance Research

The research conducted in 2020, by Performance Research detects other interesting findings. These findings provide strong insight on the psychological insights on the participants asked, summarized in Illustration 9.

Personal safety for a live event attendee and its family, has always been a strong indicator for the level of enjoyment of an event and its overall satisfaction. In the past, concerns over violence, directly against one person, or triggered by panic, caused direct customer satisfaction. The same negative feelings would be experienced in cases of an extreme drunk or rowdy crowd, in theft, and ticket scams, regardless of the actual quality and satisfaction of the event. The list of reasons an event in the future could cause complete dissatisfaction to, have now completely changed in priority. More than half of all participants asked, value concepts of social distancing at an event. Cleanliness and sanitation of the venue itself, restrooms, food, and service areas are, for more than half of all participants, an absolute priority to enjoy an event in the future.⁴⁷ For booking companies, venue management and bands, these changes in future triggers of customer satisfaction will need to be addressed.

⁴⁶ Cf. Performance Research (2020), Online source [04.09.2021]

⁴⁷ Cf. Ibid.

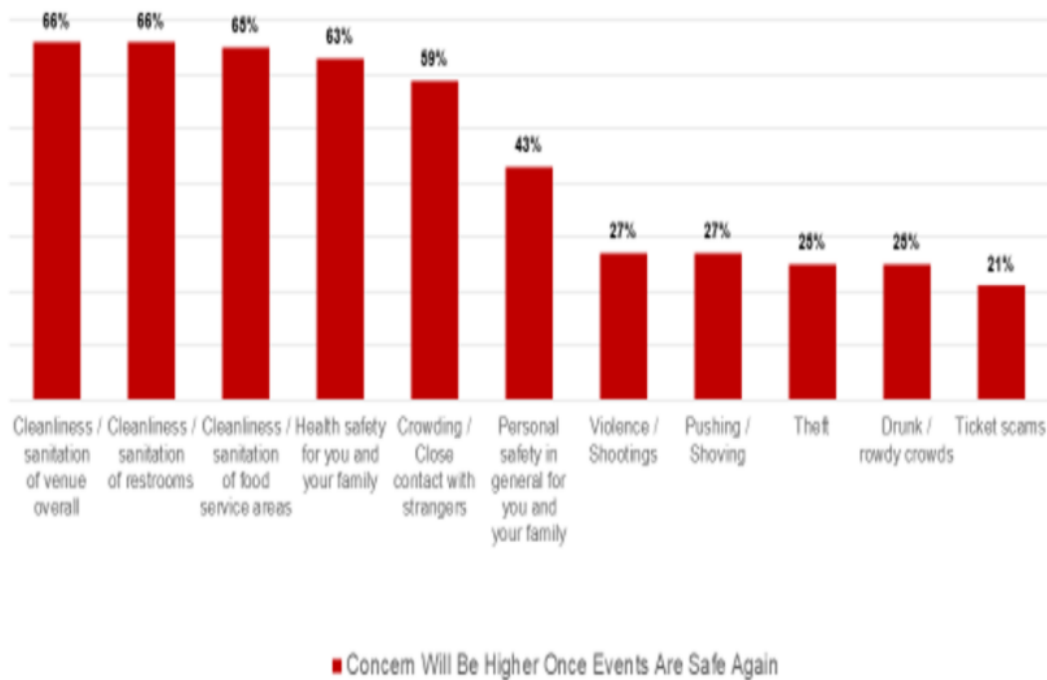


Illustration 9: Change of concerns during live events, source Performance Research

The research conducted by Performance Research would support business concepts, that digital online event streams, could provide a platform, at least temporarily, to guide customers back to live events. Customers would have the choice to decide if they are prepared to attend a live music event directly or, for the time being, they feel more comfortable enjoying an event from the safety of their homes. Hybrid events could be the answer to capturing both customer segments.

5.3 Digital Streaming and Hybrid Events - Case Studies

The case studies researched in the following sections describe the business strategies of two bands during the Corona crisis and the subsequential complete shut-down of all live events in Europe. It also recounts the struggle of survival and search for alternative business ideas concepts, of the popular live event venue, Colos-Saal in Germany.

5.3.1 A virtual evening with Nightwish

Nightwish is a symphonic metal band from Finland, founded in 1996. The band is one of the most successful metal bands in Finland. In total, the band has sold over 15 million records worldwide and played concerts in forty-five countries. The music of Nightwish is strongly inspired by film music. Since 1997, the band has released 9 full length studio albums. In April 2020, Nightwish successfully released, their latest studio album: Human. :II: Nature. The album achieved success on numerous global Top 20 studio album charts.

This included the number one chart position in Germany, Finland, and Switzerland.⁴⁸ After the tour to promote the new album was postponed due to the COVID-19 pandemic, the band was scheduled to return and begin the world tour on March 12, 2021. They planned to host an interactive livestream experience in a tavern built in virtual reality, with songs from the album on the setlist. The virtual livestream show was later postponed until May 2021.⁴⁹

On May 28th and 29th 2021, Nightwish performed in a virtual tavern called "The Islanders Arms" built in a virtual world. On both nights, fans world-wide experienced a two-hour digital and virtual performance, hearing songs of the latest album, for the first time live.⁵⁰

The first night of the bands interactive experiences attracted over 150,000 viewers, making it a new record for the largest paid virtual concert in the history of Finland. Most viewers streamed the digital event from Europe and the United States of America. However, it was a global event, with fans in 108 countries purchasing tickets online and generating a total ticket revenue of well over one million euro, combined for both events.⁵¹



Illustration 10: Virtual Night with Nightwish, source Metal.de

The booking company responsible for organizing all technical set-ups for the virtual event was Fullstream Agency, from Helsinki. In partnership with the management company Till Dawn They Count the entire project required six months of preparation to make the event possible. 30 employees were required to build the 3D images surrounding the digital stage and to provide the digital knowledge to allow fans to interact with each other, in form of a chat feature during the event. The entire computer-generated imagery, which applied computer graphics and digital animation was supported by the band performing in the studio, playing in front of a green box.

⁴⁸ Cf. Metal-archives (2021), Online source [04.09.2021]

⁴⁹ Cf. Braveworlds (2021), Online source [04.09.2021]

⁵⁰ Cf. Blabbermouth (2021), Online source [04.09.2021]

⁵¹ Cf. MoreCore (2021), Online source [04.09.2021]



Illustration 11: Virtual Night with Nightwish, source Metal.de

5.3.2 Becoming a hybrid live music venue – Colos-Saal Aschaffenburg

The Colos-Saal is an iconic live venue in Aschaffenburg, a town in the northern part of Bavaria, Germany. Founded in 1983, the live location has delivered about 10,000 events, with a heavy focus on concerts, cabaret, theatre, indoor events, open airs, and political events. The company boasts 55,000 newsletter subscribers, sixteen full-time event management and entertainment technicians and many more part-time employees and volunteers. With close to 3 million visitors, over close to forty years, and more than 300 events each year, the venue is considered a cultural treasure.⁵²

Due to the COVID-19 pandemic and consequently the entire closure of the live event music business, Mathias Garbe, the business manager of event booking, began looking for alternative business opportunities for the time when a government social-distancing regulations would be either reduced or lifted altogether. The idea to offer both bands and fans hybrid events was born in early 2020. Hybrid events would allow for a small number of customers to attend an event, complying with all German government regulations and following strict 3 G mandates. Additionally, additional revenue streams could be generated by providing a high quality online live stream for customers watching from home.⁵³

In the coming months customers were able to purchase advance tickets online and the company could securely plan for these events to take place. Even if COVID-19 government restrictions changed, the event could go on as a hybrid event or in the worst case as a live streaming event. The shows are titled “corona shows” to underline that all events would only be accessible, live and on the day of the event, instead of as in other digital formats, whereby an event would be pre-recorded and later sold as a live stream that could be accessed indefinitely once an online ticket has been purchased by a customer.⁵⁴

All customers are required to purchase tickets online, which are offered in three price categories. Digital tickets were sold at a discounted rate compared to classical ticket. Customers also had the opportunity to

⁵² Cf. Colos-saal (2021), Online source [06.09.2021]

⁵³ Cf. Garbe, Matthias (04.09.2021), Streaming Infos Colos-Saal. [info@colos-saal.de]

⁵⁴ Cf. Colos-saal (2021), Online source [06.09.2021]

volunteer to purchase digital streaming tickets at a higher and pay a “social-fee” to support musicians and organizers.

All online or streaming tickets for the hybrid concerts have a link to the streaming platform and a code to log into the concert account. Customers are advised to play the concert on any Internet-enabled device using a browser (Personal computer, laptop, smartphone, tablet, TV via Apple TV, Fire TV, and Chromecast), optimally redirected to a big screen television at home, with docked sound system. Once the live concert is over, fans still have 24 hours to watch the event again before the viewing link expires.

At the actual venue only 100 customers are admitted, and the venue must provide hygiene measures and seating. Masks are only compulsory while out of your seating area. Once seated, masks may be removed during the concert. Reservations are mandatory to be conducted by small groups of customers with an exact registration of all group ticket holders. Individual ticket purchases are not possible. Individual ticket purchases would reduce the allowed total attendance at Colos-saal down to 60 people. Each group has assigned seats and it is not possible to change seats outside the group. Chairs must remain in place and cannot be rearranged. Re-entry to the venue is not allowed for fans to prevent two- way traffic. By entering the event, customers automatically accept and agree, that the event will be filmed, streamed, and broadcasted.⁵⁵

5.3.3 A Digital Streaming event to survive in the music business - Wolfheart

In 2012 Tuomas Saukkonen founded the Finish Melodic Death Metal band Wolfheart. The band is considered one of the most successful and influential bands coming from the northern part of Europe and has released five full length studio albums so far. The latest released album from 2020, “Wolves of Karelia”, reached the number eight album chart position in Finland. It was also able to achieve strong album chart results in both, Germany, and Switzerland. “Wolves of Karelia” sold nearly ten thousand physical copies world-wide.⁵⁶



Illustration 12: Wolfheart Band Photo, source Napalm Records Handels GmbH

⁵⁵ Cf. Garbe, Matthias (04.09.2021). Streaming Info's Colos-Saal. [info@colos-saal.de]

⁵⁶ Cf. Napalm Records Handels GmbH (10.09.2021) Abrechnungen [info@napalmrecords.com]

In the spring of 2020, the band was scheduled to play a twenty-show headliner tour in the USA and Canada, after having completed two full-length tours in Europe the previous year. Tuomas Saukkonen had already invested close to €20,000 euro in flights and working visa applications for himself, his band, and the crew. The headliner tour got cancelled on short notice, just weeks before its start, due to newly introduced COVID-19 restrictions, making all travel arrangements to the USA impossible. The band was facing an economical disaster.⁵⁷

Wolfheart, was one of the first bands in the rock and heavy metal music business segment to provide a digital live streaming concert event to off-set some of financial losses occurred. The event took place on April 10th, 2020, at the Finlandia Club in Lahti, Finland. This venue usually has a capacity of 650 customers. Wolfheart used the crowdfunding internet platform “Indiegogo” to offer tickets. Customers were asked to spend €20 per ticket to receive the digital code to take part of the online event, which was pre-recorded. No other ticket bundling, and merchandise options were offered. The digital stream provided was valid for one night and customers did not have the opportunity to interact with the band or with each other during or after the event.⁵⁸

A total 675 customers signed up for the event, generating 13,749 euro in income for the band. Illustration 13 demonstrates that most fans joined the event from Finland, United States of America, Germany, the United Kingdom and France. The geographical statistics by customer segment, reflect nearly identical, actual album sales generated by country for the bands two last album releases. The income numbers also reflect that Wolfheart was able to reach customers world-wide.

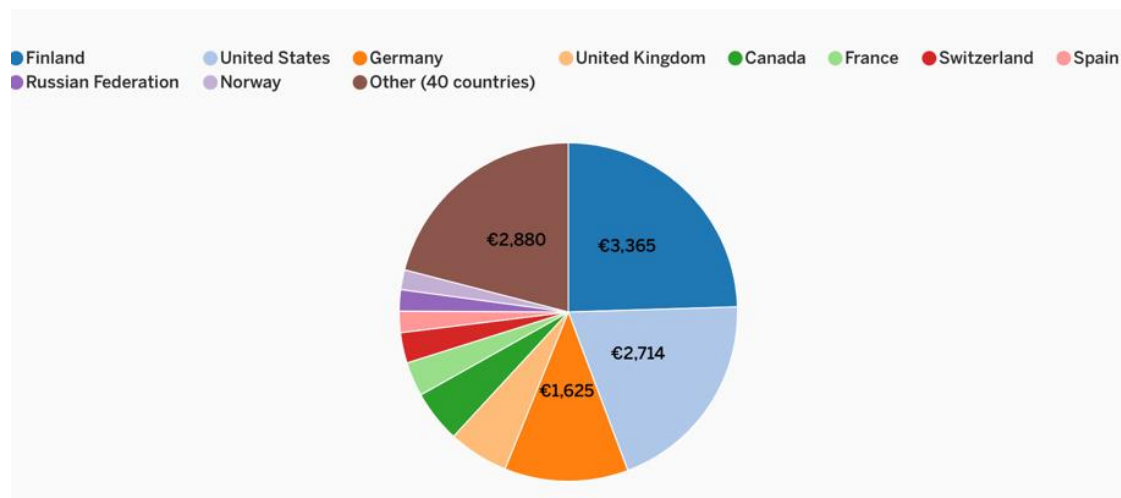


Illustration 13: Digital Streaming Income by geographical location, source: Saukkonen, Tuomas (2021), tuomas.saukkonen@gmail.com

Wolfheart spent close to 3,000 euro in renting the venue, audio, and video camera technicians. The technical set-up included a high-quality venue stage with a big light rig. The crew at the venue was working with ten cameras: using professional quality live recording equipment. Wolfheart did not require its own streaming technician to finalize the event. The success of the digital streaming income, combined with a

⁵⁷ Cf. Saukkonen, Tuomas (08.09.2021). Wolfheart Master Thesis. [tuomas.saukkonen@gmail.com]

⁵⁸ Cf. Ibid.

conservative expense structure made the event a financial success and allowed the band to continue to run a successful business.

5.4 Case Studies: Summary - Success stories and failures

The previous section, researched in detail, two case studies of bands and one live event venue, during the COVID-19 crisis. This was the period of the strictest government regulations and nearly complete venue shut-down, Europe. The successful bands, Nightwish and Wolfheart have made significant different experiences during the COVID-19 lock-down, while the event venue Colos-Saal continues its search for a sustainable business concept.

5.4.1 Nightwish's Virtual Streaming Event

Nightwish's virtual streaming event in the animated tavern "The Islanders Arms" is most certainly a success for multiple reasons:

a) In the history of rock and heavy metal live performance, there are only a handful of bands that have a similar success in reaching 150,000 customers in a two-night event with an actual customer segment being present. Arguably, only the market leaders: Metallica, Guns n' Roses, Iron Maiden and AC/DC would be capable of servicing similar levels of customer demand. 150,000 total customers, divided over two events, would require two stadium shows. This comes with an enormous financial investment and high level of logistical expertise.

b) Attracting customers from over 108 countries in a two-day live event cannot be matched by any regular touring activities. Nightwish's virtual live stream allowed to reach customer segments all-over the world. Particularly, some countries that would have very seldomly seen the band perform live. It can be presumed that Nightwish was able to capture additional customers and deepen the loyalty levels with current customers.

c) Nightwish was able to generate nearly one-million-euro revenue for a two-day digital live stream event. By comparison, heavy metal super stars Rammstein received a performance fee of one million euro, as the headliner at the world's biggest heavy metal festival in Wacken, Germany in 2013.

d) Due to all regular touring activities being cancelled or postponed until 2022, bands trying to compensate for missed touring opportunities; the digital event, created imposing media attention. Touring activities create press, promotion, and social media attention for any band. The lack of live touring events can damage the standing of a band, resulting in declining future album sales. The virtual live event did a fantastic job, bridging the distance between a new album release or an actual tour, after the COVID-19 crisis has ended.

Critique for the virtual live event, comes from Austria's biggest online heavy metal magazine Stormbringer. Here, the journalist Sophia Brandt argues in the article: "An Evening with Nightwish in a virtual world" that the silence between songs was unbearable. At a regular live event fans would celebrate each song with cheering and clapping while the silence here, made her miss fans at an actual event. The silence made for an artificial feeling, that could not compensate for an actual live event. As exciting as the fully animated outside world seemed, the inside also seemed static and unmemorable, Sophia Brandt explains further.⁵⁹

At the beginning of the event, the hard edges between the person and the green screen reminded her of bands in computer games. After a short time, however, the eye got used to it. The customer live-chat, which was supposed to be at the edge of the screen for viewers to exchange ideas, was also largely unavailable. For people who were looking forward to the digital exchange with other fans, this was certainly a setback.⁶⁰

Unquestionably, the virtual live event was a successful promotional and economical event. However, assumptions can be made, if a new digital live event would attract the same amount of interest for fans and press alike. There are also some technical challenges evident and direct customer communication with the band and other fans would need to be improved.

5.4.2 Colos-Saal and the sustainability of digital and hybrid live events

Mathias Garbe, the business manager of the Colos-Saal event location in Aschaffenburg, Germany has mixed impressions about the future of digital streaming and hybrid live events. At the beginning of the COVID-19 pandemic, these events have been mostly positively received by the customers as an alternative to regular concerts. Now, in the summer of 2021 the interest for digital and streaming events has declined drastically. In general, he noticed that digital and hybrid events are interesting to customers that simply enjoy listening to a band perform. For cultural customers with the need to participate in an event, structured primarily as a party and less so, a music live event; digital streaming has proven ineffective. The dominant customer need cannot be fulfilled.⁶¹

The limiting of the digital stream availability for 24 hours, designed to create some limitation and thereby increase customers interest in purchasing a digital live event, received some criticism from fans, Fans claimed that the consumption of the digital live event was too short. The booking agency did not have an economical advantage here. Another disadvantage to customers occurred when the Colos-Saal decided not to offer any fan chat functions during an event. One reason was that the additional manpower to supervise the online event was economically not feasible. In addition, the event location was concerned that chat functions, would create a playground for too many negative and insulting conversations. For this reason, all chat functions were deactivated. This made any fan to band, or fan to fan dialogue impossible.⁶²

⁵⁹ Cf. Stormbringer (2021), Online source [11.09.2021]

⁶⁰ Cf. Ibid.

⁶¹ Cf. Garbe, Matthias (07.09.2021). Streaming Infos Colos-Saal. [info@colos-saal.de]

⁶² Cf. Ibid.

The bands performing enjoyed the digital and streaming events; to play again and to reach fans throughout the world. They mostly see a digital and hybrid performance as a promotional campaign to be done on a very limited basis, once or twice per album release cycle.

Matthias Garbe still sees potential for the technology and economical possibilities for the future of digital or hybrid events, particularly for customers with health challenges. There are also customer segments that will remain concerned and will continue to avoid large fan gatherings, even once COVID-19 passes. One advantage will be to increase revenue streams for album release shows and sold-out events.⁶³

5.4.3 Digital Streaming with Wolfheart – A job to be done

For Tuomas Saukkonen and his band Wolfheart, the digital streaming event was literally a lifesaver to recover financial losses of the cancelled tour in the United States of America and Canada. It allowed for some social media attention to keep the band interesting to its customer fan base.

After reflecting on the event, Tuomas Saukkonen would prefer as a musician not to play any digital live streaming events in the future. In his opinion a digital live event can never replace a concert. Playing in front of an actual audience and playing in an empty venue felt awkward and difficult. It felt like a job that needed to be done and should not be repeated. Wolfheart, see business opportunities in form of hybrid events more optimistically since they would occur in front of an actual live audience but could also generate additional revenue streams and reach more fans globally.

⁶³ Cf. Garbe, Matthias (07.09.2021). Streaming Infos Colos-Saal. [info@colos-saal.de]

6 NEW BUSINESS OPPORTUNITIES AND INNOVATIONS AFTER THE CORONA CRISIS

The COVID-19 pandemic outbreak in early 2020 has changed the business concept of the live music industry drastically. Cancelled events, festivals and entire touring activities have been reduced to nothing. The entire industry was hopeful to re-start all live activities in 2021, the outlook looks disheartening, with most business ideas already being postponed to at least 2022.

Digital streaming and hybrid events, are not, new innovations or newly developed business concepts. They are now being considered as alternatives to conventional touring and event activities of the past. The innovative ideas of digital streaming, hybrid events and a variety of other technological innovations have been available for the live music industry but have remained wildly ignored. The COVID-19 pandemic outbreak can be considered the catalysator, to re-evaluate new technological innovations that could serve as alternatives to conventional live events. These could provide a competitive edge for booking companies and bands in the future.

In 2015, Live Nation, the world-wide market leader in live events, believed that live music events are not threatened by technology, but on the contrary, it would allow customers around the world to discover new artists, increase artists followers and thereby drive market demand for live entertainment.⁶⁴

The opportunities of digital streaming events have been considered in different parts of the research provided. The following sections analyse in more detail, alternative innovative ideas.

6.1 Hybrid live music events

The rise of digital streaming acceptance, in recent years, can be attributed to technological innovations. These include boosts in internet bandwidth and the arrival of new streaming platforms. Technological advances in mobile devices equipped with state-of-the-art cameras and high-speed internet has further increased the opportunities for digital streaming.⁶⁵

One alternative, and widely considered a compromise to satisfy various customer segments is the idea of hybrid live events. Hybrid live events could provide the live music event industry with a real alternative and revolutionize the entire business set-up in the future. Where in the past, the core business strategy was based on selling out an event in form of an actual physical attendance of customers; a hybrid event could increase the number of customers attending, both physically and digitally. A hybrid live event allows for an unlimited number of digital tickets to be sold, while at the same time the old concept of touring can be saved. Potential fans, unable to attend, due to health or travel distance could be added as a customer segment.⁶⁶

⁶⁴ Cf. Live Nation (2015), Online source [12.09.2021]

⁶⁵ Cf. Yanev, Victor (2019), Online source [12.09.2021]

⁶⁶ Cf. Nordgård (2018), pp. 88-92

Hybrid events offer a mix of offline and online live concerts and may be the perfect solution for many artists and music professionals in the future. In the absence of fully occupied events and tours, allowing for a smaller physical attending audience, they could secure additional revenue streams. This benefits the musicians, their touring or event crew, venues, booking companies, stage managers, sound and light technicians, equipment rental companies, catering companies and merchandise sellers. It also allows fans who love the live experience to attend the show in person, with all the safety and health precautions in place. It also does not neglect fans who still want to experience the event but can't or don't want to be there in person.⁶⁷ Hybrid live event approaches, offer creative possibilities to engage customers in providing music online; and allow new social connections both among the live audience online and bands and their audiences.⁶⁸

Maurizio Iacono, co-owner of the Continental Concert booking company and Hard Impact artist management company in the United States of America believes that hybrid live event business strategies will offer creative opportunities for booking companies and artists to intensify direct customer relationships and open new forms of cooperation. The live business industries will see further transitions away from a primary focus on sales and marketing from a goods-based approach to a service-based perspective, where bands and booking companies are complementing their products with services or concentrating more on services as a business strategy.⁶⁹

Matthias Vandeven, the business manager, and owner of Sound of Liberation booking company in Germany believes that hybrid business strategies will become the new standard after the COVID-19 pandemic passes. For most European touring activities, providing at least one hybrid event, either at the tour-start or in combination with a live event and album release show. One hybrid event per touring cycle will allow additional revenue incomes that can be shared with the live venue, band and booking company. For Vandeven, the key opportunity of success is based on the reliable and inexpensive technology that allows for a hybrid event to take place. Hybrid events reach customer segments that geographically are unable to attend an event. For European bands the entry barriers to break-into a US market are excessive. Hybrid live events, where a band is performing in Europe but a customer segment in the US can participate online, could further increase interest for the band in the United States, and thereby creating opportunities to enter the market in the future. Hybrid events would also directly provide statistics to support the location of customer segment and compare them with record sales and social media analytics, to identify new business opportunities and available markets.⁷⁰

Enzo Marangelli, an experienced Belgian rock, and heavy metal manager see the greatest customer potential of hybrid live events. He sees there being great value and viewer engagement for online customers. Where in the past, digital streaming events primary focused on technical set-ups of the actual stream, hybrid live events could become the next step in the customer service evolution. If online customers are engaged during and after the streaming event, this could add great value. To him, an effective customer

⁶⁷ Cf. Show4me (2021), Online source [04.09.2021]

⁶⁸ Freeman (2010), pp. 149-168

⁶⁹ Cf. Iacono, Maurizio (12.09.2021). Master Thesis Hybrid Events. [maurizio@hardimpact.net]

⁷⁰ Cf, Vandeven, Matthias – Business Manager and owner Sound of Liberation – Online Interview, [30.08.2021]

engagement includes offering customers background information about the event, two-way chat functions between not only fans, but also with the band. Innovations are required, that will create customer satisfaction and excitement, not just providing a link to a hybrid live event.⁷¹

Frank Maier, journalist at Backstage PRO, Germany's biggest professional booking network agrees that digital streaming and hybrid events would need to provide new services and customer concepts, other than simply filming two-hour concerts. The main challenge is determining what a streamed event will consist of. Simply transferring the current live event concept 1:1 as a live stream will not work, particularly since most artists already offer, mostly for free, an infinite amount of good quality video material of concerts on YouTube. The industry needs to think outside the box and take inspiration from formats that are already established. For gaming, the Twitch platform provides special features that allow direct interaction with the audience. Twitch allows the audience to give comments, tips, and instructions, while the gamer can respond to these comments. This creates a live dynamic, interactive, and impulse experience for both gamer and audience. Applied to a concert stream and hybrid live event this could mean that the audience decides on the live track list and how a concert should proceed. As bonus features digital and hybrid online customer could take part of the band's sound-check and rehearsals or the creation process of a new song.⁷²

6.2 Holograms Live Events

Holographic representations are for the most part, not a "new" innovation. Since the 1860s they have been called Pepper's Ghost and were a simple trick or illusion used for Victorian fun fairs and circus attractions. A Pepper's Ghost trick consists of a variety of mirrors, where a reflective glass panel is placed on a stage and tilted down toward a hidden cubicle. When the hidden cubicle lights up, it reflects an image on the glass, which then projects the image for the live audience. Looking at the image from a very close distance, it would look squashed, however when the audience is looking at the stage, the image looks real, with a ghostly, translucent appearance. This technology still requires an actual actor to appear as the image to be projected.⁷³

Today's hologram technology is made using a photographic technique that captures the light scattered from an object and then projects it, so that it appears three-dimensional.⁷⁴

No other hologram live event has ever seen more public interest than the September 2021 announced ABBA reunion show "ABBA Voyage". The hologram live event, using the band members as pre-recorded avatars will take place in various cities throughout Europe and will equally promote the first new album release in 40 years, due out in November 2021.⁷⁵

The appeal of hologram technology as a business strategy to a booking agent, promoter, band manager and venue could create some competitive advantages. In the rock and heavily metal live music industry,

⁷¹ Cf. Marangelli, Enzo (28.08.2021). The Vintage Caravan Touring. [enzo@mirror-am.com]

⁷² Cf. Backstage Pro (2022), Online source [12.09.2021]

⁷³ Cf. Sportsclinictampico, (2021), Online source [15.09.2021]

⁷⁴ Cf. Ibid.

⁷⁵ Cf. Berliner Zeitung, (2021), Online source [15.09.2021]

they could allow for the resurrection of deceased artists. The resurrection of deceased artists could satisfy a niche, allowing fans to re-live the concert experience they enjoyed and experienced in the past; particular the period 1980-1990, as a nostalgia. However, they could also provide customer opportunities to see an artist for the first time, thereby introducing new customers to a band and booking company.⁷⁶

The business opportunities created by the hologram technology, could create some security for booking agents, promoter, and venues. Some bands and artists suffer from fatigue, tantrums, depressions, or other emotional breakdowns that could become an obstacle or lead to cancellations of an event; holograms will make very little demands. Demanding touring schedules, that will result over time in declining quality performances could be avoided by adding hologram technology as a live performance alternative.⁷⁷

In the rock and heavily metal live music industry holograms have been used for various Ronnie James Dio shows since his death in 2010. Ronnie James Dio was the famous performer and singer of the bands Rainbow, Dio and Black Sabbath. A live hologram performance, including all remaining band members was introduced in 2016 at the Wacken Festival in Germany followed by world-wide tours featuring the legacy of Ronnie James Dio. The Dio hologram, created by a Los Angeles-based entertainment company called Eyellusion, presented a challenge right from the start. The cost of providing the hologram technology was expensive, and the size of the hologram too large, which created logistically and transportation challenges. Given the live performance stage requirements needed; this ruled out many locations interested in such an event, leaving only a couple venues in Europe and the United States of America.⁷⁸

The biggest challenge to Ronnie James Dio's hologram touring activities came from the perception of press and other musicians. Many fans felt that the artist was appearing like a ghost, resulting in negative emotions, reminding fans again, that the artist had, passed away. The hologram appeared like a puppet, lacking any real emotions. Announcing the tour as "Dio Returns" made matters worse when the artist was not returning at all but had died years ago. Some musicians and music industry executives argued that that Dio's death and accomplishments should be held in memory, and not used for economical gain⁷⁹

⁷⁶ Cf. Mazierska/Gillon/Rigg (2020), p. 116

⁷⁷ Cf. Ibid., p. 118

⁷⁸ Cf. Blabbermouth, (2021), Online source [15.09.2021]

⁷⁹ Cf. Kerrang, (2021), Online source [15.09.2021]



Illustration 14: Ronnie James Dio Hologram, Online Source [15.09.2021]

Kris Krovatin, of the popular heavy metal magazine Kerrang, described in 2019 in his article: “The Dio Hologram Is Awful Needs To Stop”; the Ronnie James Dio performance as an aesthetical anomaly named the Uncanny Valley. An Uncanny Valley is a term that describes reactions to human-like objects; the more something appears to look human, the more viewers should like it, however when it looks imperfectly human-like the effect reverses, creating feelings of disgust. The thought is that it reminds viewers of a corpse and creates negative feelings.⁸⁰

Hologram live performances will continue to be an attractive business alternative and could possibly create a competitive edge to every tour for both musicians, bands and booking events alike. Many of the successful rock and metal bands are looking back at forty or more years of live performances. Arguably, in the next five to ten years many of these bands will discontinue their touring activities, while technology innovations will create more interesting and assumingly more affordable opportunities.

6.3 Competitive advantage through innovative live locations

Most present time live events are associated with an open-air festival, an indoor event location or the occasional street or park event in urban areas. One business concept, mainly on the rise since the outbreak of the COVID-19 pandemic, focuses on providing creative alternative venues that can comply with all government regulations and allow for social distancing. The heavy metal queen, Doro Pesch performed on June 13, 2020, at the CARantena Arena in Worms, Germany, a drive-in theatre event. Hundreds of fans were able to watch a full performance in their cars, making the event a unique experience.⁸¹

The US artist Sammy Hagar, best known as the former singer of Van Halen, performed in front of 200 guests at a rooftop concert on September 22, 2021, above the Strip at Beer Park in Las Vegas. The

⁸⁰ Cf. Kerrang, (2021), Online source [15.09.2021]

⁸¹ Cf. Metal Hammer DE, (2020), Online source [17.09.2021]

performance included surprise guests that spontaneously determined the track-list for the live event. Additional fans were able to watch and hear the performance on big screens near the venue.⁸²

Live streams are still often the only way for many bands to present themselves to a larger (virtual) audience. The progressive US band Mastodon, offered in July 2021, a high-quality live stream experience. The special live stream event took place at the Georgia Aquarium offering fans not only the live performance, but a breath-taking view of the underwater zoo.



Illustration 15: Mastodon – Captured Live at Georgia Aquarium, Online source [17.09.2021]

Since Mastodon was concerned about the wellbeing of the animals at the aquarium, the band performed a shorter acoustic set to reduce the volume of the sound.

6.4 Virtual and Augmented Reality

One prediction for the future of live music events is the use of virtual and augmented reality. For many this seems to be a utopian concept becoming reality in the upcoming years; but virtual reality has already arrived in the gaming industry a decade ago. Gaming customers already enjoy virtual reality headsets to take advantage of visionary and virtual gaming environments. Customers unable or unwilling to attend a concert, could soon be able to attend and participate in a virtual live event, enjoying an extremely realistic stage set-up and band performance.

In 2016 Facebook bought the virtual reality audio company Two Big Ears, to become the early innovator and market-leader in 3D audio technology, which impacts the viewer perception in the virtual reality for live events and games alike. Enveloping 3D audio is highly important for high-end virtual reality; it is and even more so for the virtual reality experiences on Facebook videos, still in their infancy. The technology focuses primarily on how sound is supplied in 3D spaces, and how its interconnects with surfaces that surround the viewer.⁸³

⁸² Cf. Blabbermouth. Net, (2021), Online source [17.09.2021]

⁸³ Cf. Techcrunch, (2016), Online source [17.09.2021]

Virtual reality concerts are still less common than digital online streaming or hybrid live events but could become an attractive business segment in the future. In a virtual reality concert, customers in the form of avatars can participate in a digital live event, performed by real bands, which also appear as avatars. The actual event could take place in a video game or any other virtual location, at a specific time. In the past similar concerts have already taken place in the Fortnite video game platform, which allowed fans as avatars to jump, clap and dance. For now, these virtual events are free to customers, but they already have a great benefit in raising social media band and brand awareness, and push album and band merchandise sales.⁸⁴

6.5 Metaverse

In the summer of 2021, Facebook announced that they are working on a virtual world called Metaverse. The idea is that customers in the future can meet in the virtual world, spend money, and consume games and virtual events. It would even be possible to work in the virtual world. The idea behind the Metaverse is to give users a sense of real presence and a feeling of interacting with actual people. Products like virtual reality headsets and smart screens could give customers the feeling of being interconnected, even if they are geographically apart from each other. The idea behind the Metaverse is not entirely new. The video game producer Epic Games is working on similar technologies and already uses the gaming platform Fortnite as base for players and live events. Metaverse has the potential for booking companies and bands to become one of the most important live venues of the future.⁸⁵

6.6 Blockchain & Non Fungible Token

Arizona's heavy metal band Megadeth is one of the first rock and heavy metal bands that combines live events and touring with the non fungible token technology to generate added value to its customers. Fans of the band can purchase non fungible token VIP and general admission packages. The sales of these are limited to 1500 for VIP packages and 2500 for general admission world-wide. They will be provided as non fungible token gift cards. They became immediate collector items; the band saw an increase in ticket pre-sales for the upcoming tour in the United States. Since these tokens were first offered to customers who are part of the official band fan club, these tokens helped to create customer loyalty. As a business strategy the token campaign worked well, because the entire rock and metal press was talking about the token campaign thereby helping to promote the tour and raising the bands social media standing. All available tokens were sold within one month.⁸⁶

⁸⁴ Cf. Forbes, (2021), Online source [17.09.2021]

⁸⁵ Cf. FAZ, (2021), Online source [17.09.2021]

⁸⁶ Cf. Megadeth (2021), Online source [15.09.2021]

7 TECHNOLOGY POSSIBILITIES

In the live music event industry, digital streaming as a standalone technological environment or in form of a digital hybrid mix business, along with live holograms, are presently, the most applied technologies. This chapter explains both technologies in more detail.

7.1 Live Streaming and Hybrid Technology

Technical requirements to make a digital streaming or hybrid live events possible are highly standardized and inexpensive today. Most bands and booking companies will regularly negotiate with the management of live venues for these opportunities, particularly for album release shows or special content events. Often there are no additional expenses bands and booking companies need to pay up front, but instead, earning shares on the streams and digital ticket income, are directly negotiated in the performance agreement.

Dave Brey, the technical director and in charge of all digital and hybrid live events for the Colos-Saal live venue in Aschaffenburg, Germany argues that the key for success lies in the correct video camera set-up. Having a highly professional video set-up will ensure that customers watching the live event online, will be visually integrated to follow the entire show. Colos-Saal has for that reason, seven cameras distributed in the venue. Three of them are fixed to the ceiling (one far back centre, two left and right quite close to the stage). All cameras can be moved via a console or can be saved in a position to use them later, when a band is playing a solo part. One camera is installed on a tripod in the hall and is operated by a staff member during the concert and is the only camera that does not provide a static image. An additional camera is placed behind the drums to look over the drummer's shoulder. Two other cameras are set-up on the stage, one left and one right. These move freely and can be set-up depending on the band requirements.

All signals received during the live event, converge to a control desk, which manages to steer the actual live transmission, selected by a technical manager of the venue. From that point all visual images and effects are final and can no longer be changed.⁸⁷

Following the visual technical set-up, the technical team focuses on adjusting the audio sound of the performance. The instruments that are typically the loudest in the venue and least likely will be included in the live mix, mostly the drumming, need to be adjusted in volume for the live stream. Finally, ambient sound will be added, so that the audience at home will get the feeling of the live atmosphere. Technically, the set-up does not require much effort, everything is hard-wired directly at the venue, so the biggest challenge is to position the cameras on stage and save the positions of the band members in advance.⁸⁸

The Colos-Saal event venues streams all online and hybrid events via Reservix, which uses Vimeo as a platform.⁸⁹ The most popular livestreaming platforms include Twitch, Instagram Live, Periscope, YouTube Live and Facebook Live.

⁸⁷ Cf. Brey, Dave (14.09.2021). Streaming Infos Colos-Saal. [dave@colos-saal.info]

⁸⁸ Cf. Ibid.

⁸⁹ Cf. Ibid.

7.2 Hologram Technology

Holograms are considered independent 3D light structures, since they are not reflected onto a surface, different than 2 D images, but can be diffused by glass or other bodies with a similar structure. Most hologram technologies used for live music performances are based on the Musion Eyeliner Screening technique which uses a projector and thin layers of Mylar film. At the next step, the Mylar film is placed in front of a performance stage at a 45-degree angle, where a projector in front of the stage casts an image onto the Mylar film. A source or content video is required for the demonstrations. As a requirement, the source video should be completely still to create the image that an artist is on stage. The source video can be created by using a still camera, or more costly by using a 3D model. The new 3D models require financial investments close to €400,000 making them inaccessible even for mainstream rock and metal acts like Metallica, KISS and Aerosmith.⁹⁰

Musion Eyeliner technology is currently the state of art technology used for most hologram events. The technique, using still video technology, is more affordable to bands and booking companies but is nowhere near at a mature technology level.

Some of the present challenges are:

Synchronisation:

Holograms require multiple projectors to create a perfect wide and clear hologram image. These projectors need to work synchronously to create such image. If one projector faces a technological problem, the image will be ruined.

Wind:

The Musion Eyeliner technology uses very thin Mylar screens which are susceptible to winds and breezes, making the image appear wavy.

Viewing:

Holograms are best viewed straight on. Viewing a hologram from the side will give it a flat appearance.

Illumination:

Holograms work best in a dark or dim stage environment, but the image itself will look disproportionately bright and flat when actual musicians join the stage.⁹¹

⁹⁰ Cf. Sportsclinictampico, (2021), Online source [15.09.2021)

⁹¹ Cf. Ibid.

8 THEORETICAL FINDINGS, SELECTION OF SUCCESS FACTORS AND RECOMMENDATION

The research findings suggest that the live music segment, particular in Germany, continues to be a thriving business; regardless of the current economic challenges caused by the COVID-19 pandemic and are expected to reach in the year 2022, a total revenue above 1,6 billion euro.⁹² Digital music consumption is expected to rise to more than 1,3 billion euro in total revenue in 2021.⁹³ The hypothesis can be raised, that with the overall growth numbers of total live music and digital music streams, customers could be interested in digital live concert streams, either as stand-alone digital concerts or hybrid events.

Michael Spanring, head of distribution worldwide at Napalm Records strongly believes, that with the decline in physical music product sales, the equilibrium switches away from physical musical sound-carriers, towards merchandise sales and live touring revenue streams. This vacuum could create more opportunities for live touring income available.⁹⁴ None of the theoretical findings, nor literature, can confirm or dismiss this hypothesis and would need to be further analysed in quantitative and qualitative customer surveys.

The band case study's findings in chapter 4 narrate that the COVID-19 pandemic caused disastrous consequences to the live event business over the past two years. Nevertheless, both cases proved that bands with an attendance of 100-1000 people in the rock and heavy metal genre had struggled before. The traditional heavy metal band achieved a touring attendance capacity of below 50 percent. Its audience is an aging and primary audience. The band is currently unable to reach any other audience outside mainland Europe.⁹⁵ The band God Is An Astronaut was the second case study. While the band is overall successful, describes an economical imbalance between the size of the venues booked and a strong inconsistency in event attendance. This reflects a discrepancy between venue fees paid and a paying audience. Matthias Vandeven, business manager of the booking company Sound of Liberation, sees in the findings the observable ongoing challenge, between medium size bands and touring activities in a saturated live market availability. He foresees that the discrepancies between touring opportunities provided and convincing a customer segment to attend, will further increase.⁹⁶ As described in chapter 5, the research survey conducted by Performance Research in March 2020, indicates that nearly 44 percent of all live music customers consider attending less concerts or none in the future.⁹⁷

⁹² Cf. Statista (2021), Online source [07.10.2021]

⁹³ Cf. BVMI Bundesverband Musikindustrie (2021), Online source [01.09.2021]

⁹⁴ Cf. Spanring, Michael – Head of distribution worldwide, Napalm Records Austria – Online Interview, [05.10.2021]

⁹⁵ Cf. Booking Business Manager (anonymous) written documentation, [25.08.2021]

⁹⁶ Cf. Vandeven, Matthias – Business Manager and owner Sound of Liberation – Online Interview, [07.10.2021]

⁹⁷ Cf. Performance Research (2020), Online source [04.09.2021]

8.1 Research results for digital streaming and live events, innovations, and available technology

The digital streaming and hybrid event case studies described in chapter 5 show that digital online and streaming events have been economically successful and for the most part have been well received by customers during the COVID-19 pandemic. The technology requirements needed to provide a digital live streaming event or hybrid are available and accessible at many live event venues. Utilization of them would create very little additional expenses to bands or booking companies.⁹⁸ Nonetheless, for the business concept to be sustainable in the future, booking companies are required to identify the most important basic customer expectations and reduce obstacles that hinder music fans to join a digital or hybrid live event.

In all research conducted and band cases studied, the band or booking company was able to capture why customers participated in a digital event yet failed to conduct any exploration on what customers enjoyed during the event. There is no available information or statistics accessible to describe what customer needs, unmet- or hidden needs could be. The rock and heavy metal live industry's primary focus has been to provide the technological infrastructure for live digital streaming events, but fails to identify customer needs, pleasure points, or create enough excitement that would create an ongoing band / booking company and customer relationship. It can be argued that the primary "job to be done" for a customer is to watch and listen to their favourite band online, however this could, at best, describe a basic function and would create a very basic level of customer value.

Alternatively, current, or futuristic technologies, researched in chapter 6 offer interesting opportunities to create a competitive edge for a minority of live events and booking companies. The described Nightwish virtual reality case, with an investment of more than one million euro to provide fans with the technological know-how, is simply not economically sound to function as a business strategy for a booking company with an average attendance of 100 to 1000 fans. This implies that no such large customer base is currently obtainable. Virtual and augmented reality, but also Metaverse business concepts, according to Thorsten Harm, the head of the booking company Napalm Events and label owner of Rodeostar (Booking- & Artist Management Agency and Record-Label), being newly implemented technologies, will become a relevant business concept for bands attracting an audience more than 20,000 or more fans interested in a digital live event.⁹⁹ The research results gathered in chapter 6, identifies that these new live music industry concepts, aside from its intensive financial investment requirements, do lack the full acceptance of fans and media press alike.¹⁰⁰ Currently, all virtual reality shows lack the technology development to create events with customer emotions. They are perceived to create customer dissatisfaction by the break between songs, lack of applause, and without direct communication between band and online audience.¹⁰¹

New technologies involving augmented and metaverse reality are very early technologies, that currently are in the developmental phases and have not received testing at real live or online music events. For the practical sections of the master's thesis, with the goal to identify customer value and provide suggestion to

⁹⁸ Cf. Garbe, Matthias (04.09.2021). Streaming Infos Colos-Saal. [info@colos-saal.de]

⁹⁹ Cf. Harm, Thorsten, Online Interview, [07.10.2021]

¹⁰⁰ Cf. Blabbermouth, (2021), Online source [08.10.2021]

¹⁰¹ Cf. Harm, Thorsten, Online Interview, [07.10.2021]

booking companies and bands on how added customer value can enhance customer attendance, these technologies are irrelevant and will be, going forward, disregarded.

Blockchain and non- fungible token technology as researched in chapter 6.7 will become a key service for customer ticketing and the overall live event industry in the next three to five years, but currently only drives customer behaviour for mainstream live bands and booking companies. Here also, the financial investments required exceed all physical and digital ticket sales to be expected for a band attracting an average audience of 100 -1000 music fans.¹⁰²

8.2 Success potential for digital and hybrid live events

New business opportunities in form of digital and hybrid live events have been described in chapter 6.7. The key success factor is, that pure digital or hybrid live events can be easily added to the existing business set-up of most booking companies that on average attract a live audience of 100 to 1000 customers. As described in the technology requirements for digital and hybrid technologies in chapter 7, the technology is highly standardized and inexpensive. Live venues like the Colos-Saal in Aschaffenburg, already provide the full technology necessary to provide a full service; including camera setting, audio control desk and streaming outlet via Reservix, which uses Vimeo as a platform.

The key advantages of digital and hybrid live events are:

1. Attendance

With hybrid events, the booking company can reach many attendees who are both live and virtual. An in-person event may have limitations on the size of the venue and the number of attendees who can attend. A digital online or hybrid event will utilize the capacity of the live event.¹⁰³ Many venues are still underutilized because the social distancing requirements. have not yet been met. Even at maximum capacity, there is a certain number of viewers that each live music venue can accommodate. With live streaming, the event has endless opportunities to reach customers anywhere in the world.¹⁰⁴

2. Accessibility, scheduling and location

Digital streaming has made great performances more accessible, and people appreciate the easier access to the event. This is also holds true for people with disabilities, who previously had difficulty navigating on-site events.¹⁰⁵ The COVID-19 restrictions continue to change rapidly, making it extremely difficult for a music fan to guarantee attendance. A hybrid event can convert some of the in-person attendees into virtual attendees. This could reduce the need to cancel or postpone an event while reducing financial liabilities.¹⁰⁶

¹⁰² Cf. Iacono, Maurizio (12.09.2021), Master Thesis Hybrid Events. [maurizio@hardimpact.net]

¹⁰³ Cf. Morethandigital.info (2021), Online source [08.10.2021]

¹⁰⁴ Cf. Broadcast Mgmt (2021), Online source [28.08.2021]

¹⁰⁵ Cf. Ibid.

¹⁰⁶ Cf. Morethandigital.info (2021), Online source [08.10.2021]

3. Environment Benefit

Travel is one of the biggest contributors to CO2 emissions and in-person events always require a short or long journey to the venue. This opens the opportunity to participate in an event with a sustainable mindset while attending events in a faraway cities and countries. Attendees who want to reduce their carbon footprint have the option to visit in an online event. This way, attendees can participate in the event and enjoy the same benefits as all other participants, while helping to reduce carbon emissions.¹⁰⁷

4. Reduced venue costs

In-person events require a high financial investment, and the more people that attend your event, the higher those costs will be. Hybrid events will reduce expenses by decreasing the number of in-person attendees, which in turn reduces the cost of travel, venue rental fees, catering, and cleaning staff.¹⁰⁸

5. Customer engagement

Adding a digital stream to a live event provides more opportunities to connect directly with customers before, during and after the event. Online customers can actively participate via mobile phones, tablets, smart TV's or home computers. Customers would be able to ask questions, like and share, and interact with other music fans and attendees.¹⁰⁹

8.3 Success Factors

The scientific findings in chapter 8.2 provide a variety of opportunities and benefits for booking companies to increase the online attendance. For pure digital live events, or to expand overall customer numbers by adding an online audience to a live music event. Adding an online customer segment would enable booking companies to reach new customers, who are unable or unwilling to attend a live event.

The research findings, particularly in all evaluated band cases studies, provide convincing reasons to believe, that very little focus on actual customer preferences was given. In all studies, it is generally believed that the attractiveness of band and music and the overall technical digital stream set-up fulfilled most customer needs. The assumption cannot entirely be refuted. Nevertheless, the hypothesis, based on the research results gathered, suggest that booking companies could create important and necessary competitive advantages, if all customer needs are collected, obstacles and pain points are identified, and opportunities are discovered that create customer excitement. These customer findings could later be captured in a booking company value proposition and later transferred to a successful business model canvas.

¹⁰⁷ Cf. Morethandigital.info (2021), Online source [08.10.2021]

¹⁰⁸ Cf. Ibid.

¹⁰⁹ Cf. Broadcast Mgmt. (2021), Online source [28.08.2021]

8.4 Recommendation of future action steps (Handlungsempfehlung)

All research findings conducted, through literature and trade press, band case studies and expert evaluations lead to the theoretical result that digital online streaming, either as stand-alone event streams, or in form of hybrid events, offer the most business potential to bands and booking companies. With the COVID-19 crisis continuing well into the year 2022 and customers concerns about returning to crowded live venues, digital streaming of online and hybrid live events provide a strong foundation to further increase customer online attendance thereby off-setting the declining “on-site” customer numbers. The technological aspect of digital online streaming of concerts is attainable, at low additional cost, throughout all European countries, Customers generally accept the technology, and a high rate of user experience has been confirmed.

To maximize the customer potential, direct customer research is proposed to achieve a full in-depth understanding of:

a) Identification of the current customer and the customer of tomorrow

The most important customer service deficits are the untapped customer potential of customers currently not using any online digital concert services. There is currently very little understanding as to why a customer chooses to take part of a digital online event or why such an offer is declined.

A full understanding of who the current customer is, and which customers have not been reached or ignored is needed. All research suggests that the question for customer needs has not been raised, by any digital live events in the past. The first starting point would be to create 2-3 personas to identify the most important current customer group and two potentially new customer segments.

b) Identification and naming of current customer basic needs, performance, and excitement attributes

None of the current theoretical research suggests that these customer needs are known or recognized to bands and booking companies. As a result, it is important to name these different needs and identify which needs are already considered basic needs to customers, and which ones would create additional value to customers. Identifying performance, unspoken needs and implementing them for future digital online performances, could create customer loyalty and further increase the attendance of online customers.

c) Recognizing customer pain points and obstacles that currently impede customers to take advantage of digital online streaming events

Practical customer surveys are required to fully understand why customers are unwilling to join an online live event. Perhaps, customers are unfamiliar with the advantages of online live events, or they are unfamiliar with the service provided. Based on the research findings, additional customer service besides the basic concert stream offering could be implemented to capture new customer segments, who currently declining all existing offers.

d) Understanding how customers compare traditional live events with online digital events

A better customer knowledge is required to understand and assess, if customers will simply return to traditional concert offering after the COVID-19 crisis has ended, making digital online concerts a temporary substitute. Which customer service offering, and personal circumstances would continue to make digital online concert offerings attractive.

The following customer research survey methods are recommended to understand the questions raised and the answers needed to verify that digital online concerts are to be recommended for booking companies and bands in the future:

A quantitative customer survey to identify basic, unmet, and hidden needs, and evaluate the findings and formulate them according to the Kano model. Customers participating in the survey all have some experience with online digital streams of live concerts. The focus, throughout the customer survey concentrates on the quality of the service provided, user experience and the search for performance needs and pleasure points. It provides an attempt to understand what basic customer needs are.

The questions raised, will identify how easily customers will switch back to traditional live performance concepts, after the COVID-19 crisis has passed and what additional services and circumstances could attract customers in the future. It attempts to analyse and identify possibilities that could lead to long-term interest in online services provided. The quantitative customer survey will investigate the interplay between frequency of current customer concert stream, and the online ticket cost sensitivity that determines a customer decision towards online live events versus traditional live concert experiences.

A customer focus-group workshop to identify obstacles that currently deter customers from participating in online digital live events and identify customer jobs to be done and pleasure points. Brainstorming techniques are used to identify the current customer understanding and experience level of online digital streaming events. In the workshop, participants will be guided through a customer journey to identify all touchpoints the customer has during an online digital concert event. Here the purpose is to identify hidden customer needs, the potential to provide better services on the product and to reduce all obstacles and current deterrents (pain creators) that hinder customers from currently using online events. In the final stage of the focus group workshop, all nine sections of the 9 Windows Operator are used to take advantage of the customer research tool. The method of zooming in and out on the actual service provided and view the product from different angles to identify the products components and the service provided while the service is being used, the time before and the time after. Finally, the customers are observed before the service is used, during the live event and afterwards.

In evaluating the results of the quantitative survey of customers who have experienced a digital online live concert, and a qualitative focus group workshop of customers with little to no experience with a digital live event, an exact proposal will be created to determine how current customer behaviour is driven. Personas are created and identified that represent the most important customer segments. Being able to name new

customer values, excitement points, and customer pains will allow for to create suggestions with the purpose to refine the live music experience in the future.

Illustration 16 summarizes the theoretical key findings and results leading to decision to focus on digital live online events as a recommendation to further raise customer attendance and increase ticket and merchandise income potentials. The action plan will focus on current customers and customers that are currently non-users. Applying a customer survey for digital online streaming events and customer focus group workshop for non-users.

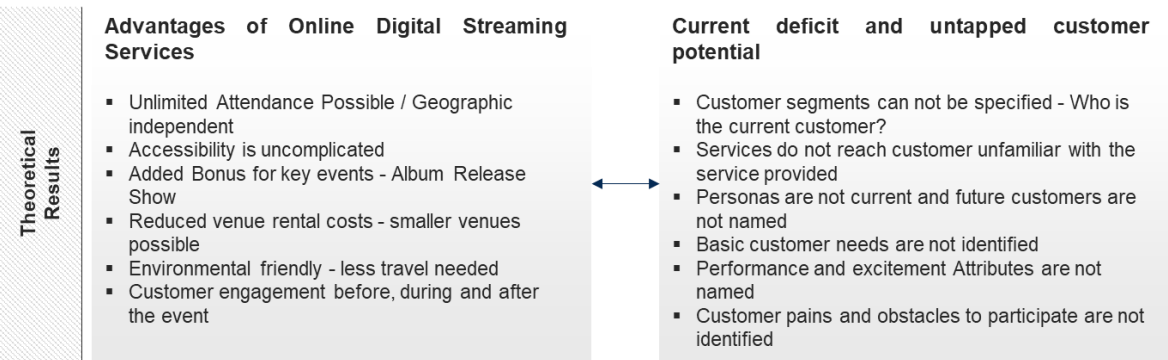
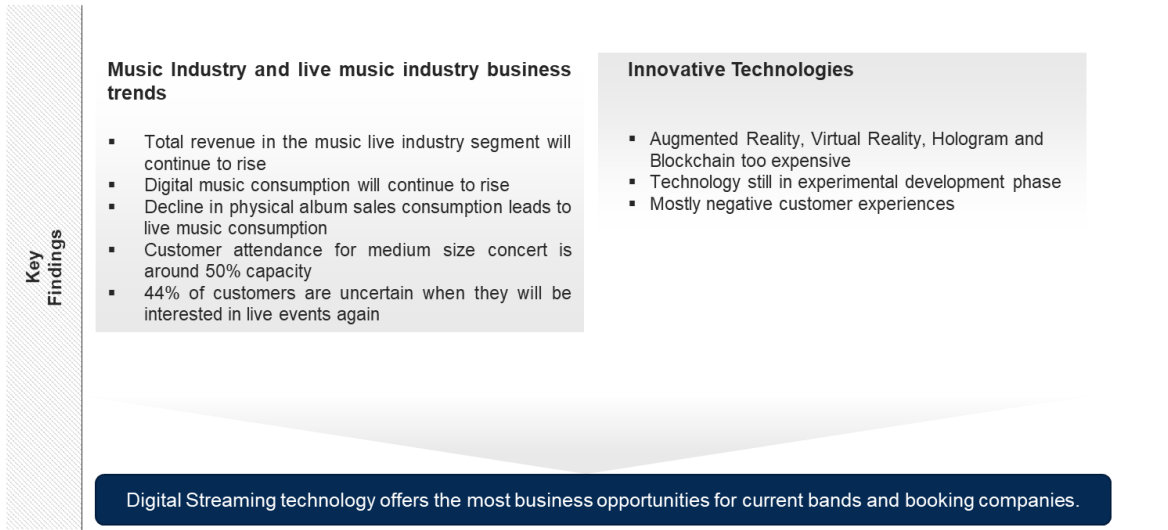
The desired results of the survey and workshop are to:

- Verify 2 customer segments / personas for current users.
- Verify 3 the key customer needs, performance, and excitement attributes for current users.
- Verify 2 customer segments / personas for current non-users.
- Verify the key obstacles of non-users for digital events and how they can be reduced.
- Verify the key customer needs, performance, and excitement attributes for current- non-users.

The results and verification should lead to:

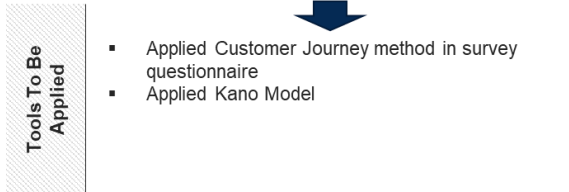
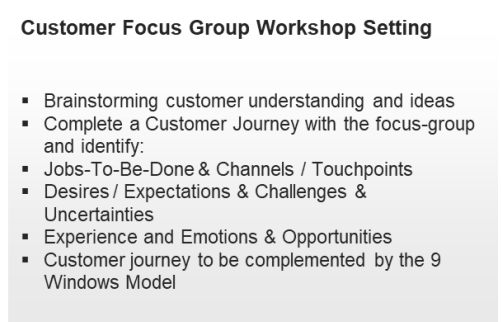
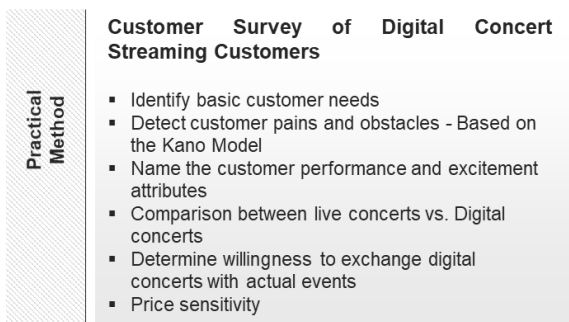
- Apply 3 unique selling propositions that can be applied to a digital event for current users.
- Apply 3 unique selling propositions that can be applied to a digital event for current non-users.

Plan of Action



Current Digital Live Concert Customer

Non-Users of Digital Live Concerts



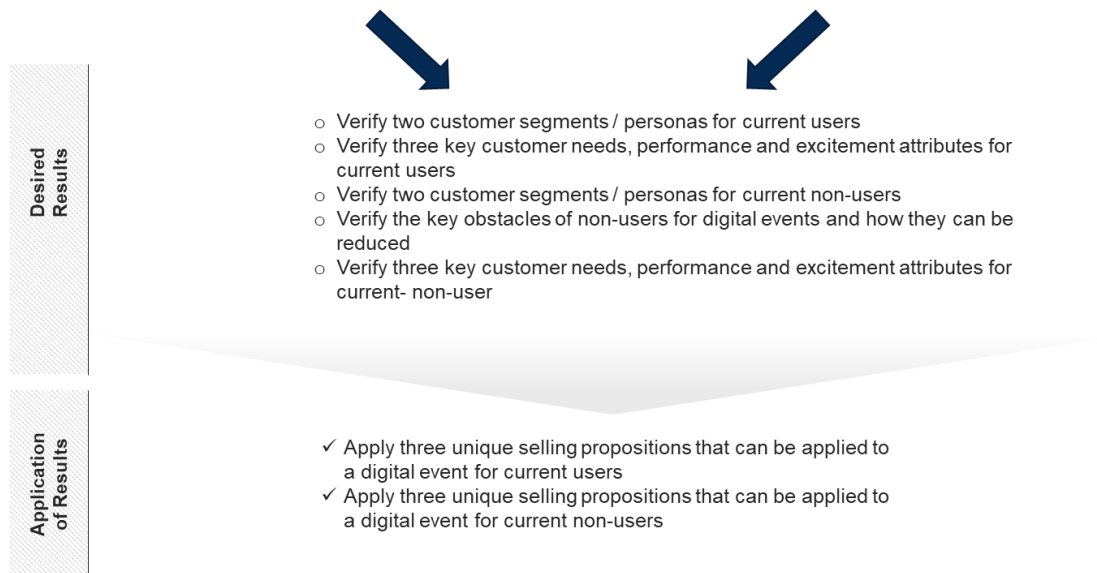


Illustration 16: Plan of Action for a Band or Booking company, own creation

9 EMPIRICAL METHODS TO GENERATE CONSUMER INSIGHTS, TRENDS AND VALUE

The following chapter lists the empirical research methods applied, necessary for the proposed quantitative customer survey and a customer focus-group workshop to validate or discard the recommendations of action steps summarized in the previous chapter.

9.1 Identifying Hidden Customer Needs

Many newly introduced services in the live event music industry have been expensive disappointments in the past. It can be argued that hologram technology, as explained in the Ronnie James Dio business case, has simply not matured enough to satisfy customers. In all research conducted, no evidence could be found that the band management or booking company conducted any scientific research to identify if customers would see a Ronnie James Dio hologram live event as an added benefit. The hologram technology created mostly negative customer experiences, resulting in negative emotions towards the hologram and its limited technology.

For new products and services to be successful, they need to inspire customers. Often these products and services fail because they are too like existing products in the market. Product and service differentiation are, however, only one aspect why products fail to attract customers. The actual problem is that companies do not understand customer desires enough and need to identify what the hidden needs of customers are. Hidden needs are topics and challenges customers are confronted with. Since they are hidden needs, they are not suspected by customers. As soon as these hidden needs are taken care of for customers, they result in positive effects of surprise and pleasure. Therefore, hidden needs are desires, that many customers will identify as important once they see the final product or service but are unable to articulate in advance.¹¹⁰ Therefore, hidden needs are challenges and problems customers face, but have not registered to the customer.¹¹¹

Customer needs can be divided in 3 categories:

Known Needs:

These are customer needs that have been known for a long time and are basic performance features. Known needs are already added to all products and services and used by all competitors as well. For customer satisfaction indicators they mostly reflect the base level to achieve some satisfaction; its absence leading to dissatisfaction.¹¹²

¹¹⁰ Cf. Goffin/Lemke/Koners/ (2011), pp. 1 -15

¹¹¹ Cf. Ibid., p. 8

¹¹² Cf. Ibid.

Unmet Needs:

These are customer needs for services and products that have been identified by a product or service provider, but the need itself has not been satisfied.¹¹³

Hidden Needs:

Hidden needs that have not been addressed by companies providing a service or product, but also have not been identified by customers.¹¹⁴

9.2 Personas

Personas are fictional customer profiles that are often created to represent and narrow down a particular customer segment based on their common interest, needs, challenges and values. The developed personas can represent the most important customer groups that could be selected for qualitative customer surveys and focus group interviews.¹¹⁵

The most common method for developing personas is to summarize research findings into groups with common interests that can be established as representing characters. The key to a strong persona is how appealing it is. There are various techniques used to create personas, from visual portraits to detailed anecdotal profiles to establish real characters.¹¹⁶

Personas can produce several different perspectives on a customer service or product provided, and its stakeholders in the target market. Effective personas can explain the desires, needs, pains and challenges of real people. Although the personas themselves are fictional, they can explain actual customer reactions and motivations.¹¹⁷

Both fictional persona cards for Manfred and Michaela as presented in illustrations 17 and 18 could provide a better understanding of the customer segment, their goals, behaviours, and challenges.

For a live digital streaming event, the persona Manfred could be 25-year-old super-market manager who is in a relationship. Manfred could be interested in football and music. He owns a large CD collection and in his free time attends as many concerts as possible. Manfred uses various social-media outlets to stay informed about upcoming shows and has watched live streaming concerts in the past. His challenge is that due to work constraints, he is unable to attend as many concerts as he would like.

¹¹³ Cf. Goffin/Lemke/Koners/ (2011), pp. 1 -15

¹¹⁴ Cf. Ibid.

¹¹⁵ Cf. Stickdorn/Schneider, (2010), p.172

¹¹⁶ Cf. Ibid.

¹¹⁷ Cf. Stickdorn/Schneider, (2010), p.173

For a live digital streaming event the persona Michaela could be 45-year-old mail-order manager, single with one young daughter. Michaela is interested in cooking, shopping, music, and meeting friends. Michaela uses only Facebook and Instagram to consume social media input and has never watched a digital live event. Michaela loves to attend concerts but finds it often difficult to find a babysitter or have the means of transportation to attend an event.

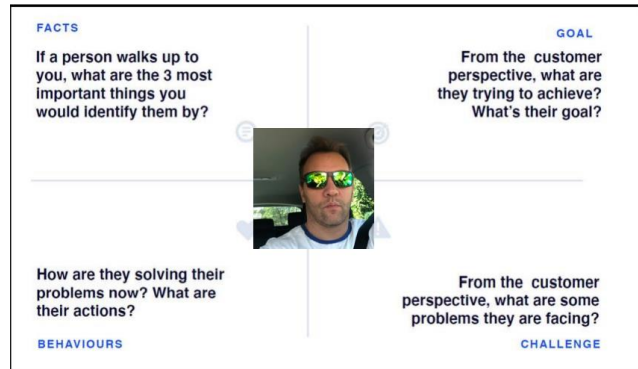


Illustration 17: Persona Manfred, Source Dr. Ronald Tingle Campus 02 Lecture: Innovation Marketing, slightly changed

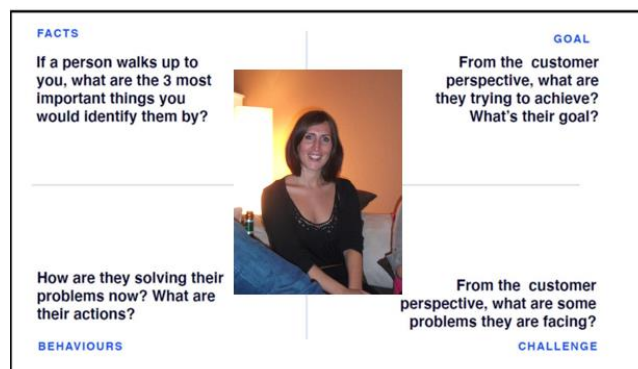


Illustration 18: Persona Michaela, Source Dr. Ronald Tingle Campus 02 Lecture: Innovation Marketing, slightly changed

Both personas could represent the most important customer segments for the practical research. One customer base that would be interested to consume more live events to balance the time between work responsibilities and leisure time. The other customer base is currently not interested in digital live events and faces several challenges to attend live events in general.

9.3 Customer Insights from the Kano Model

One of the best-known models for understanding customer needs, particular hidden needs, is that from Professor Noriaki Kano. His own model for customer needs was originally published in 1984.¹¹⁸

Kano's customer need model is based on Herzberg's theory of motivation-hygiene. The psychologist Frederick Herzberg distinguishes between hygiene and motivation factors. A fulfilment of the hygiene

¹¹⁸ Cf. Kano/Saraku/Takahashi/Tsuji (1996), pp. 165-186

factors serves to eliminate dissatisfaction. However, an elimination of the negative factors cannot lead to the achievement of satisfaction. Only a state of eliminated dissatisfaction is achieved. For satisfaction to occur, additional motivators must be met. Overall, Herzberg's theory of motivation suggests that satisfaction must be viewed not as a one-dimensional construct, but as a multidimensional construct.¹¹⁹

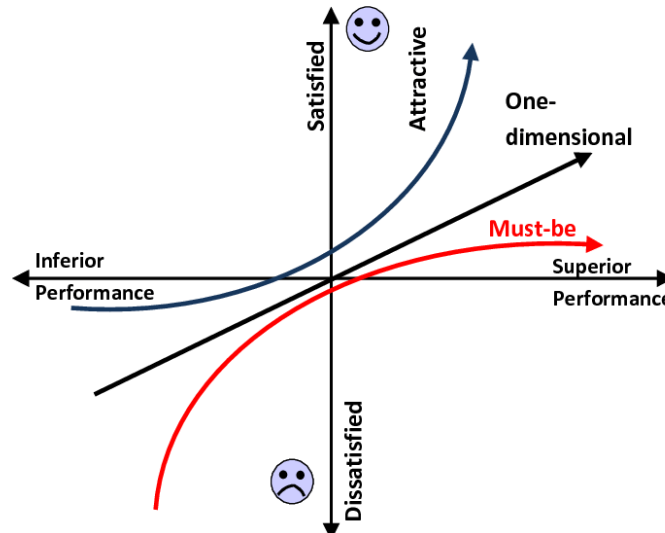


Illustration 19: "Kano-Model-of-Attractive-and-Must-be-Attributes" (Researchgate 2013), Online Source [22.09.2021]

"The Kano Model is a technique used in product development to identify the most appropriate mix of features in order to maximize the satisfaction of a product."¹²⁰

In the model, the horizontal axis describes the product or service functions from inferior performance to superior performance. The vertical axis describes the customer perception of satisfaction with the service or product from completely dissatisfied to completely satisfied. Must-be attributes are represented by the red line reflect the basic functions of the product or service. Basic functions will not generate any satisfaction and are not a selling point at all. If the basic functions are missing, customers will be dissatisfied. For a streaming live event this means waving good audio sound, or enough camera set-ups to give the viewer appropriate visual participation.¹²¹

One-dimensional attributes are directly associated with the performance characteristic. The higher the performance attributes are, the higher customer satisfaction will be perceived. One-dimensional attributes for a live streaming event would be good chat functions during the event and the band performing a live set that was voted on by the online community ahead of time.¹²²

Attractive attributes will achieve high levels of customer satisfaction when the performance is high. A lack of attractive attributes, or low level of attractive attributes, on the other hand, will not result in negative

¹¹⁹ Cf. Herzberg/Mausner/Snyderman (1959) pp. 4 - 8

¹²⁰ Dalton (2019) p. 189

¹²¹ Cf. Researchgate, (2013), Online source [22.09.2021]

¹²² Cf. Ibid.

customer satisfaction. For a live streaming event this could be an active communication between band and online audience, or a surprise gift for all fans that joined the online concert.¹²³

There are two remaining attributes mentioned in the Kano model. Neutral attributes are located where both axes cross. Here customer satisfaction is neither positive nor negative, regardless of the attributes. Customers simply do not care one way or the other. The last remaining attribute is the reverse attribute. With reverse attributes, a product or service designed to provide additional customer satisfaction, results in customer dissatisfaction. An example of this could be: if the booking company for a digital live event offers too many purchasing options in the pre-order phase, confusing the customers, or making them question their need for a purchasing altogether.¹²⁴

One key focus, in the practical chapters of the master thesis, will be to analyse live streaming, or hybrid live events to determine what customers perceive as basic customer needs; which aspects of digital streaming are considered one dimensional, which aspects create pleasure, and which aspects are unexpected.

9.4 Customer Journey – Digital Live Streaming Event

A customer journey is a marketing and innovation management tool, that describes the process a potential customer goes through from evaluating different products or services, to making a purchasing decision, and the post purchase phase. From a marketing viewpoint, the customer journey refers to all points of contact, the so-called touchpoints, of a customer with a product or service.¹²⁵

The customer journey is the typical interaction process that a person goes through with a brand at a certain stage of an interest, decision, or purchase process. Consumer touchpoints and customer touchpoints are the individual points of contact and interaction between the customer and the brand or the company, which together make up the customer experience.¹²⁶

A customer journey map is drawn up to visualize both particularly positive and particularly negative contact points within the overall service offering. The insights gained can then be used to eliminate the deficits within the service offering, or to build on strengths, which further increase customer satisfaction.¹²⁷

A customer journey is often designed following the formation of personas, because contact points can then be specifically adapted to these target persons. Further in the research, in a customer focus group setting, a customer journey map can be created to identify new customer needs, behaviours and expectations. It can then compare them with possible strengths and weaknesses of the product or customer service provided.

Regarding the decision to participate or not to participate in a live streaming event, customers can be asked to describe a customer journey. The goal being to gain a deeper understanding of what drives customer

¹²³ Cf. Researchgate, (2013), Online source [22.09.2021]

¹²⁴ Cf. Ibid.

¹²⁵ Cf. Kruse Brandão/Wolfram, (2018), p. 14

¹²⁶ Cf. Ibid., p. 95

¹²⁷ Cf. Stickdorn/Schneider, (2010), p.159

behaviour. As described in table 6, the journey begins with the pre-event or awareness phase; when customers become conscious that a digital live event is being offered. As a next step it follows the pre-order or consideration phase when customers evaluate all purchase option and decide if the event would create value. The third phase along the customer journey map describes the decision process for the event. The fourth and final phase relates to the emotional results of the event, in particular the delighters and the customer evaluation of if the digital live event has created pleasure and added value.

Digital Streaming of a live event Customer Journey Map				
Journey Phase	Pre-Event Phase	Pre-Order Phase	Day of the event	Post Event Phase
	Awareness	Consideration	Decision	Delight
Jobs To Be Done				
Channels / Touch-points				
Desires & Expectations				
Challenges /Uncertainties				
Experience / Emotions				
Opportunities				

Table 6: Customer Journey Map for a digital streaming live event, source: Own Illustration

Each of the four phases in the customer journey is divided in six sections that provide an in-depth understanding of the thought process and emotional state, while the customer is making a purchase decision.

Jobs To Be Done:

Jobs To Be Done precisely determines the underlining task a customer is trying to get done, even if the customers themselves may not understand the task they are trying to get accomplished.¹²⁸

In the awareness phase, a customer job could be to stay informed about all upcoming live streaming events; while in the consideration phase, comparing ticket options could be the key job. In the decision phase, using the correct log in information and getting comfortable with the event could be the task at hand. At last, in the delight phase, chatting with friends could be the most important job to the customer.

Channels and touch-points:

Channels and touchpoints describe the moments the customers come directly in touch with the live event or perhaps the booking company.¹²⁹

In the awareness phase, this could be the moment the customer follows the band or event on various social media pages. In the consideration phase, customers could watch a tour teaser video or read about the

¹²⁸ Cf. Wunker/Wattman/Farber, (2017) p. 41

¹²⁹ Cf. Ibid.

event in a music magazine. In the decision phase, the customer locks up the band or booking webpage to compare ticket options. A delight touchpoint could be a chatroom for fans, where fans can discuss the event.

Desires and Expectations:

Desires and expectations collect all customer needs and pleasure points that are anticipated by the customer. Often these are the emotions that will decide if a customer will be completely satisfied with the service offered and if they would continue using a product or service.¹³⁰

In the awareness phase these could be getting timely and accurate information about the live streaming event. In the consideration phase this could mean easy access to all ticket options or a confirmation that the customer likes the latest album of a band. At the decision phase having high quality audio and visual sound could be a desire or expectation, while in the delight phase, having the opportunity to chat with the band online after the event could result in fulfilment.

Challenges and Uncertainties:

These are all the customer pain points that could lead to uncertainty or dissatisfaction. In the worst case, they describe all scenarios that result unhappiness and an unwillingness to consider a service or product.

In the awareness phase, these could be finding little to no information about the live streaming event, or an information over-flow. In the consideration phase customers could perceive ticket prices as unreasonably expensive or consider ticket options as overwhelming. Losing the internet connection or a poor quality digital live performance could lead to dissatisfaction and fear in the decision phase, while perceiving the event as too short could be an uncertainty in the delight phase.

Experience & Emotions:

The customer journey captures all experiences and emotions customers will encounter in each phase of the decision-making process, from the pre-purchase phase to the post event delight phase. A customer focus group could collect all possible results and seek them as opportunities to reduce pain points or increase pleasure aspects of the digital streaming event.

Opportunities:

Every band and booking company that conducts a customer journey with actual customers, could create opportunities to provide a better service for a streaming event. Each phase of the customer journey offers insights on customers desires and wishes, basic job expectations and offers a deeper understanding of customers concerns, pain-points and challenges.

¹³⁰ Cf. Wunker/Wattman/Farber, (2017) p. 128

In summary, an in-depth customer journey enables booking companies to create additional customer value, construct competitive advantages, and fully understand customer gains and pains to prepare successful business value propositions.

9.5 Brainstorming – Digital Live Streaming Event

Brainstorming is an idea generation method invented by Alex F. Osborn in 1939 and further developed by Charles Hutchison Clark to promote the generation of new, unusual ideas from people.¹³¹

There is hardly a constraint in which brainstorming cannot be applied. Very typical fields of application are problem types with simple complexity. This method is useful as an introduction to a topic, to mark out the field of possible solutions. A group of five to seven people is assembled, if possible, from different areas of expertise.¹³²

The facilitator introduces the group to the problem, which is analysed and specified in the process. The participants spontaneously, name ideas for finding a solution, ideally inspiring each other, and allowing different points of view to flow into new approaches and ideas. The ideas are then presented in a discussion phase by the moderator and discussed, evaluated, and sorted in the team. The assessment and evaluation can be done in the same discussion by the participants.¹³³

9.6 The 9 Windows Technique – Digital Live Streaming Event

The nine windows technique, in some literature, called the nine windows operator, is a scientific tool to explore customer issues on a product or service. This is done by explaining and observing the past, present, and future of a system, sub-system, and super-system. This technique is often used to ensure that companies change and evolve, without relying on tactics from the past that may not work as well in today's world.¹³⁴

“A nine windows matrix or diagram is an idea creation tool to ensure that companies, teams, and individuals do not stop innovating or developing new ideas and methods for systems, services, and products. It helps separate a problem in space and time. Once the problem has been isolated, it helps in changing the parameters of the related objects based on condition, time, or environment, or all three.”¹³⁵

Using the Nine Windows process and identifying potential new solutions, and insights as a system with time-space dimensions can help break the psychological walls associated with repeating the same actions and service steps and expecting the same results.¹³⁶

¹³¹ Cf. Lercher (2019) p. 148

¹³² Cf. Ibid.

¹³³ Cf. Ibid.

¹³⁴ Cf. Asq.org (2021), Online source [05.10.2021]

¹³⁵ Asq.org (2021), Online source [05.10.2021]

¹³⁶ Cf. Ibid.

This method encourages the user to investigate the product or service (zoom in), i.e., to look at the details, and in the opposite direction to look at the environment or the overall system (zoom out), i.e., to act from a helicopter perspective. In addition, the temporal view is also varied by looking into the past and into the future. The most useful view is at the top level of the model, i.e., mostly at the level of the customer view. It is particularly helpful to look for so-called "magic moments" at this level, i.e., special moments from the customer's point of view over time that have a particular and important influence.¹³⁷

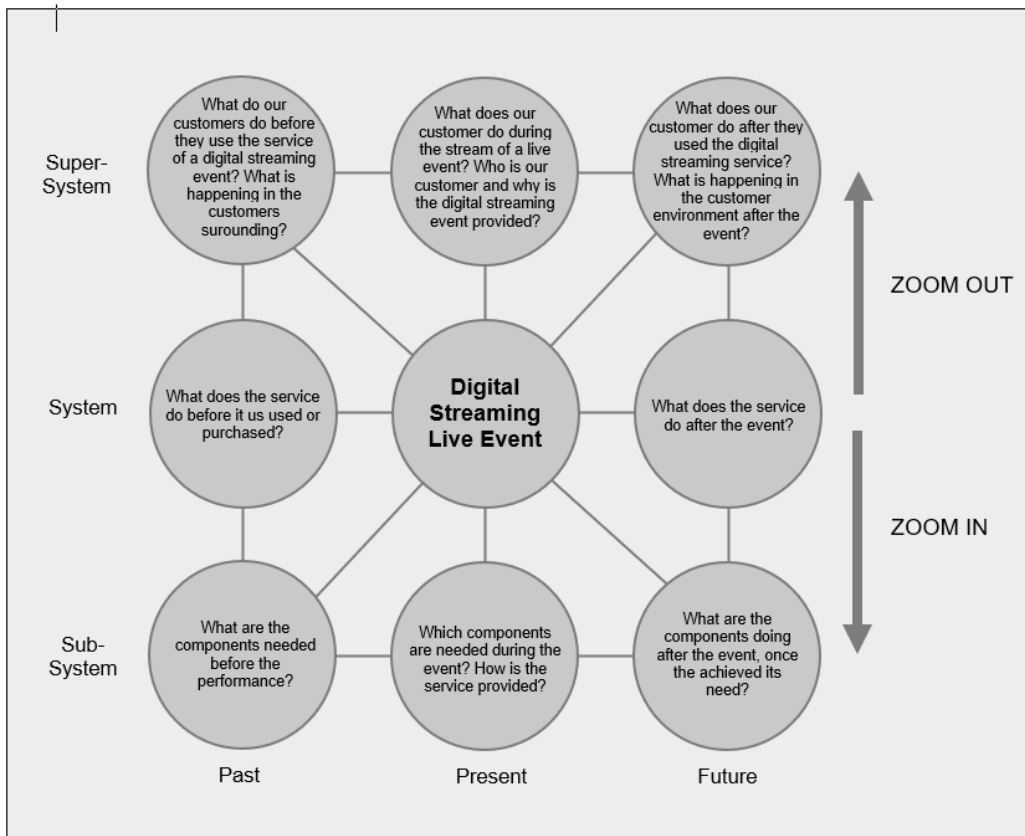


Illustration 20: The 9 Windows Operator, source: asq.org, slightly changed

The 9 Windows Operator described in Illustration 20, functions as a research tool that will be used as a complement to detect all remaining customer needs and behaviours, that have not been discovered by the customer journey method. Both, customer journey map and the 9 Windows Operator method will be applied for the customer focus group workshop.

On a system present time level, it shows the digital streaming live event as the starting point. On a system level, taking a view in the past and the future, the research questions raised will seek out answers on which services a digital streaming event should provide or does so. What does the service do before and after its dominant service of providing a digital streaming event?

The sub-system analyses the components needed before, during and after the digital live event. How is the service provided, and perhaps will identify components still missing or currently not being used? In a

¹³⁷ Cf. Lercher (2019) pp. 156-157

customer focus group workshop, the super system will focus on the customer needs directly. In the present time it will summarize and evaluate what the customer is doing during a live digital event and what best describes a customer, and why the digital streaming service is provided in the first place. Looking at the time before the actual streaming event answers should identify what the customer is doing before a digital live event, and perhaps what motivates a customer to participate in the first place.

The past super system will provide valuable insights on the customers behaviour after a live digital event. What does the customer do after a live digital event? How is customer value perceived and possibly customer loyalty created? For a sustainable business concept in the live music industry, it is crucial that a customer shares positive impressions via social media, and word of mouth communication to create future interest for digital live events.

The customer focus group workshop conducted, as a method to achieve empirical insights, will identify new undetected customer values and customer needs, while identifying challenges and obstacles that currently hinder customers to participate in online digital live events.

10 QUANTITATIVE CUSTOMER SURVEY

10.1 Aspiration of the Quantitative Customer Survey

The quantitative customer survey was designed with the following objectives:

1. To verify two customer segments (personas) that are currently using digital online streaming event services.
2. To verify the most important customer needs, performance, and excitement attributes for digital online streaming events, for customers that currently consume or have previously consumed online digital live music events.
3. To verify possible game-changers for performance and excitement attributes that would capture customer loyalty for digital online live events once the COVID-19 pandemic has passed and regular live concerts are possible again.

Once the verification process has been finalized, the overall goal is to name three unique selling propositions. These propositions be applied to the current customer segments to enhance the customer loyalty for future digital online live events and simultaneously result in an increase in the number of customers willing to attend such live events in the future. It should be possible to identify the most important customer segments, name the customer basic needs, and recommend opportunities of services that are considered performance attributes to customers. Recommended excitement attributes should create a competitive edge for bands and booking companies in the future.

10.2 Selection of Participants

In August 2021 an email request was send to Andreas Wetzstein, the Austrian founder of the Facebook Heavy Metal Group “Metal Fans Austria” to ask if it would be possible to contact some group members to see if they would be interested in participating in an online survey.

The topic, purpose, and goal of the online survey was discussed with Andreas Wetzstein and would focus on the group members experience levels with digital online concerts currently and in the past; the frequency of how this service is or was used, and its members satisfaction and dissatisfaction of various service levels dealing with the topic of digital online live events.

“Metal Fans Austria” was chosen for a pool of candidates, since it resembles Austria’s largest fan group on Facebook, with currently close to 4000 active members. The purpose of the group is to inform members of the new album releases, upcoming concert events and the evaluation of music videos. Of its members 3613 currently live in Austria, 141 in Germany, 49 in other European countries and 4 in the United States of America.¹³⁸ Of the Austrian members, 887 live in Vienna, 166 in Graz, 125 in Linz, 67 in Vienna Neustadt, 64 in Leoben, 52 in Innsbruck, 48 in Klagenfurt, 47 in Wels, 41 in Salzburg and 37 in Ternitz. All other Austrian group members live in rural places.¹³⁹

¹³⁸ Cf. Wetzstein, Andreas, Online Interview, [02.11.2021]

¹³⁹ Cf. Wetzstein, Andreas, Online Interview, [02.11.2021]

For the customer survey it was agreed that the groups administrator would send out 60 random requests to group members asking them if they would be interested in participating in an online survey discussing the following topics:

- Are online concerts an alternative or complement to traditional concert events during the COVID-19 pandemic and beyond?
- What are customers' experiences to date?
- How frequently are concert streams used?
- What are the most important needs of customers?

All members were allowed to participate, but it was described, that candidates should have watched at least one digital live music event in the genre rock and heavily metal, within the past 12 months. With the administrator it was further agreed that in the survey all members should be allowed to have the option to omit a question, if a member felt uncomfortable answering it or did not have an answer to the question raised. In addition, it was requested that the survey would not ask for the full names of the candidates.

Out of the 60 randomly selected group members 44 agreed to take part in the customer survey. Out of the 44 group members, 7 candidates were disqualified because they had not watched a rock or heavy metal digital live music event in the past 12 months. Out of the 60 candidates contacted 37 candidates were selected.

10.3 Customer Survey Trial Phase

The trial survey was conducted on October 15, 2021, with two participants who both had previously watched a digital online heavy metal live concert. One participant is the social media manager for Napalm Records, the other an IT manager working for a marketing company in Graz, Austria.

The original trial service as described in Appendix 1 consisted of 25 questions and was divided into separate sections of interest.

- Introduction and purpose of the customer survey
- Demographics of participants
- The qualification question of if the candidate had participated in an online heavy metal or rock digital online concert
- General Online concert streaming questions
- Past customer viewing behaviour during a digital online event
- Level of interest for digital online concerts after the COVID-19 pandemic has passed
- Digital Online concert customer service questions

The time it would take participants to complete the survey was estimated to be 15 minutes. Both trial candidates claimed that a 15-minute window would be inaccurate, and most candidates would require 20 to 25 minutes to complete the survey.

Both trial candidates found the service questions of what would create future satisfaction very challenging and discussed that selecting five services to rank in the order of importance challenging. They suggested that customers should have the option to name fewer services if they struggled to generate five services. As a result, the final version of the customer survey offered participants the choice to list up to five services that created satisfaction or alternatively displeased customers. Participants were still required to rank their however, now candidates could decide to choose fewer options if needed.

The most important finding of the trial survey was that both candidates were able to complete the survey on a tablet or regular computer but struggled to complete the survey using a smart phone. There were some difficulties in clicking the answers in the pre-designed sections for “Yes” or “No” questions. For that reason, the questionnaire originally designed on a word document and sent as a cloud document was redesigned and sent as a live link via Umbuzoo.de.

10.4 The Customer Survey Outcome

The customer survey conducted on Umbuzoo.de was available to all participants from October 21st until November 1st, 2021. The survey consisted of 25 questions and was divided up in the following sections:

- Introduction and purpose of the customer survey
- Demographics of participants
- The qualification question of if the candidate had participated in an online heavy metal or rock digital online concert
- General Online concert streaming questions
- Past customer viewing behaviour during a digital online event
- Level of interest for digital online concerts after the COVID-19 pandemic has passed
- Digital Online concert customer service questions

The survey was sent to 60 candidates. 44 candidates wanted to participate in the customer survey but only 37 candidates were chosen since they had watched a digital online live rock or heavy metal concert in the past 12 months. Seven candidates disqualified from the customer survey since they had never watched a digital online live concert.

a) Demographics:

Age:

The average participant is 38 years of age.

The youngest participant is 24 years of age.

The oldest participant is 65 years of age.

The mode age was 41, which was represented by 4 candidates.

Gender:

20 participants in the customer survey group are male.

17 participants in the customer survey group are female.

b) The qualification question of if the candidate had participated in an online heavy metal or rock digital online concert

There were 44 candidates who responded to the customer survey. 7 candidates were disqualified since they had never watched a digital online heavy metal or rock concert in the past 12 months.

c) General Online concert streaming questions

How many online concerts have you participated in over the past 12 months?

Fourteen participants had watched **one** online concert in the past 12 months.

Ten participants had watched **two** online concerts in the past 12 months.

Five participants had watched **three** online concerts in the past 12 months.

Two participants had watched **four** online concerts in the past 12 months.

Two participants had watched **five** online concerts in the past 12 months.

One participant had watched **six** online concerts in the past 12 months.

One participant had watched **seven** concerts in the past 12 months.

One participant had watched **eight** concerts in the past 12 months.

One participant had watched **nine** concerts in the past 12 months.

As a result, **65,9** % of the customers asked had only watched one or two concerts in the past 12 months. The average concerts watched for all survey participants is 3,6 concerts in the past 12 months. 15 out of the 17 female participants had watched one or two digital online concerts in the past 12 months.

How many of the online concerts participated were free of charge?

The customer survey identified that the 37 participants had watched a total of 97 digital online concerts in the last 12 month. 55 concerts were free of charge. In other words, for **56,7%** of all digital online events customers were able to join without paying for the event.

For how many of the online concerts where you required to pay fee to join the event?

Here the customer survey identified that customers had to pay a ticket price for some of the events. Of the 97 digital online events visited 42 events required some form of payment. In other words, for **43,3%** of all visited rock or heavy metal online events, customers decided to pay a ticket price.

What was the highest online streaming ticket price you paid in the past 12 months? - Without additional ticket & merchandise bundle options?

The highest ticket prices specified by the participants of the customer survey are €35 per ticket. The lowest ticket prices paid for are €5 per ticket.

The highest ticket priced paid for are:

€5 per ticket: 16,2% of all tickets paid for

€7 per ticket: 2,7% of all tickets paid for

€13 per ticket: 2,7% of all tickets paid for

€15 per ticket: 2,7% of all tickets paid for

€20 per ticket: 32,4% of all tickets paid for

€25 per ticket: 35,1% of all tickets paid for

€35 per ticket: 5,4% of all tickets paid for

One participant was unable to name a price

72,6% of all customers were willing to pay €20 or more for a single online digital live event. Only **24,3%** of all participants were willing to pay less than €20 per ticket. Here again, nine out of the 17 female participants had paid €20 or less per ticket. One participant was not able to name a high price.

What was the cheapest ticket price you paid for, for an online digital concert in the past 12 months? Without ticket and merchandise bundle options and free events?

The question was designed so participants in the customer survey would avoid choosing a free concert as the lowest price. However, many participants felt that a free concert is simply the lowest price available. In addition, in the customer survey design it was disregarded that for some events the band or booking company would decide to offer their customers a “pay as you wish” function.

The lowest ticket prices for a digital online event are:

€0 per ticket: 48,6% of all tickets

€5 per ticket: 13,5% of all tickets paid for

€10 per ticket: 13,5% of all tickets paid for

€13 per ticket: 2,7% of all tickets paid for

€15 per ticket: 2,7% of all tickets paid for

€20 per ticket: 8,1% of all tickets paid for

Pay as you wish: 10,8% of all tickets paid for

d) Past customer viewing behaviour during a digital online event in the past 12 months

The participants in the customer survey were asked next if they typically would stream the digital online concert alone. 33 participants out of the group decided to answer the question.

24,2% of the participants claimed that they would watch all digital live streaming events alone.

18,2% of the participants claimed that they would watch all digital live streaming events mostly alone.

39,4% of the customers asked had no preference in watching a digital live event alone or with others.

3,0% of the customers in the survey felt they would tend to rather disagree in watching a digital live event by themselves.

15,2% of the participants claimed that they totally disagree in having watched a digital live event all by themselves.

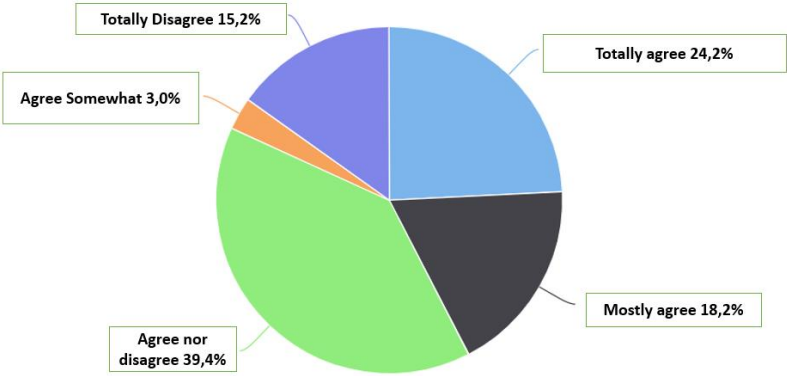


Illustration 21: Customer Survey Viewing Preferences, own source

In the following question the customer survey group was asked if they would prefer watching a digital online live event alone in the future? Alternatively, they had the option to watch the event with one to three friends, three to five friends or more than five friends. The findings in the customer survey suggest that in the future there is no interest in watching a digital live event alone. There is also no interest in watching the digital live event with more than five other people. The absolute preference for customers to enjoy a digital online live streaming event with two - three other fans in the future.

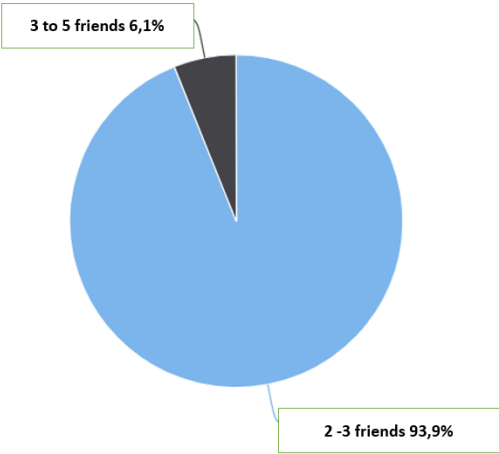


Illustration 22: Customer Survey Viewing Preferences, own source

e) Digital Online concert level of interest after the COVID-19 pandemic would pass

The customer survey questions raised next, provide a better understanding on how easily customers would switch back to regular heavy metal and rock “on-site” events once the COVID-19 pandemic has passed and attending regular live events would be possible again. Table 7, below, summarizes the answers provided by the customer survey.

Given the current serve levels, nearly two third of all participants would return to attend regular concerts and would not continue to stream digital online rock or heavy metal concerts in future. Only 15% of current customers would be inclined to use digital customer streaming events in the future.

According to the research findings there is no benefit to watching digital live events from home in order to save time by avoiding having to prepare for a night out and traveling to the venue. 75,8% of the participants somewhat disagree or totally disagree with that statement.

When it comes to combining a digital online heavy metal or rock event with an album release show where a band releases a new album and hopefully plays some of the new songs live, a great majority of 63,6% of customers would be interested in attending the event, if the event takes place outside of Austria. For album release shows, that take place in Austria the interest is significantly less. Only 27,3% of all the participants asked would see a digital live streaming event as a benefit.

Like the findings, that participants do not see it beneficial to switch to digital online rock and heavy metal concerts to save time, they are also not considered a help to re-organizing the participants leisure time. Nearly 75,6% of all participants totally disagree or somewhat disagree with that question.

The environmental benefit of saving CO2 emissions, by participants not traveling to a concert venue, and instead watching a live concert from home, is not a benefit to customers asked in this survey. 72,2% of the customers would disagree about seeing a benefit here and would continue to travel to the live venue. If the actual live venue is considered far away from the customers home, then 39,4% of all customers asked would consider switching to a digital streaming alternative while 30,3% of the customer would not see a benefit here and would decide to travel to the live location.

The customers asked in the survey are not sensitive to the pricing of the tickets. If digital streaming tickets were offered at a discount, in comparison to the asking price directly at the venue for an on-site or hybrid live event, only 12,1% percent could be convinced to decide upon the more affordable ticket option. 66,7% of customers asked in this survey could not be convinced to pick the digital online live event even if the ticket price would be more affordable.

Customer Survey Questions	Totally Agree	Somewhat Agree	Undecided	Somewhat Disagree	Totally Disagree
I would use online concerts streaming only during Corona pandemic	45,50%	27,30%	12,10%	6,10%	9,10%
I would use online concerts in the future to save time	0,00%	3,00%	21,20%	27,30%	48,50%
I would use online concerts in the future to attend album release shows online abroad	21,20%	42,40%	12,10%	12,10%	12,10%
I would use Online Concerts in the future to attend Album Release shows online in Austria	9,10%	18,20%	24,20%	18,20%	30,30%
I would use online concerts in the future to plan my free time more flexible	15,20%	0%	9,10%	21,10%	54,50%
I would use online concerts in the future in order to save CO2 by the otherwise usual journey to live events	0%	6,10%	21,20%	12,10%	60,60%
I would attend online concerts in the future if the actual venue is too far away from my home.	18,20%	21,20%	30,30%	9,10%	21,20%
I would use online concerts in the future to save money if they are cheaper than the concert ticket of the actual event.	3,00%	9,10%	21,20%	9,10%	57,60%

Table 7: Customer Live Concerts after the COVID-19 pandemic is over, own source

f) Digital Online concert customer service questions

The next section of questions raised in the customer questionnaire focus on a different aspect of customer service that a digital online stream a heavy metal or rock concert could provide to increase customer satisfaction and loyalty and increase the possibilities a customer would use the service in the future by reducing current obstacles and dissatisfaction.

It is important to me that the online stream is permanently available - even after the actual event?

In the customer survey, fans were asked how important it would be that the digital online stream would become permanently available once the event has finished. 17,6% of all customers asked, find this feature very important. 41,2% of all customers find this service feature somewhat important. Combining both findings, it can be estimated that 58,8% of all customers asked would prefer the digital link to remain available after the event. For 29,4% of the customers asked, maintaining the digital streaming link for future usage is not a matter of interest, and would therefore not increase customer satisfaction.

It is important to me that the online stream has a chat function?

Providing a fan to fan and band to fan chat function is considered important for the level of service provided and the perception of customer satisfaction. 58,8% all customers asked, consider a chat function as very important or mostly important. Only 5,9% of all customers do not have a need to use a chat function while watching a digital live event.

Exclusive merchandise purchase options for digital online concerts are important to me?

Exclusive merchandise bundles offered during the online ticket pre-sale, during or after the event is an important factor in achieving customer satisfaction and creating more customer interest for a digital live event. 70,6% of all customers asked in the survey perceive exclusive merchandise bundles as very important or somewhat important. 17,6% of customer replied that they most likely would not be affected by a digital online event purchase decision, based on exclusive merchandise bundles offered. No customer replied that that they would be not interested in the service provided.

It is important to me that bands take the time after the concert to answer online questions from online fans?

Direct communication between the band and its fans before or after the digital live event is important to the customers asked in this survey. 11,8% of all customers asked, find this service very important, while 35,3% find the communication and service provided somewhat important. 29,4% of all customers would not be interested in communicating with a band and it would not influence their level of interest to join a digital live event. 23,5% of all customers are currently undecided.

7) When there is reason to feel more comfortable at home watching a live event.

Which merchandise bundles are important to you when buying a digital online ticket?

Rank the merchandise products in descending order of importance by assigning them a number from 1-5.

1 is the most important and 5 the least important.

In this question customers had the opportunity to rank some merchandise items in the order of preference to indicate which merchandise bundles could be offered in the future in combination with an online ticket. Customers had the choice to rank an audio CD of the event, an exclusive album shirt, a signed autograph of the band, a band image or logo patch or a band image or logo flag in the order of personal interest and preferences. All items are typical merchandise items sold through the band's own webstore, record label or booking company webstore or live at the band's merchandise booth during the event.

47,1% of the customers picked an audio CD of the event as their first choice.

35,3% of the customers picked an exclusive band shirt of the event as their second choice.

47,1% of the customers picked a signed band autograph as their third choice.

42,2% of the customers picked a band album or logo patch as their fourth choice.

64,7% of the customers picked a band album or log flag as their fifth choice.

As a result, bands or booking companies that offer tickets for a digital live event for a ticket price or free charge could receive more interest if a CD of the live event or an exclusive band shirt is offered.

Which 5 services are most important to you during the online concert stream?

Rank the services you selected in descending order of importance by assigning them a number from 1-5.

1 is the most important and 5 the least important.

The focus of the customer survey question which services are the most important during a digital online event intends to identify some of the basic customer needs the participants require during the event. The Table 9, below, summarizes the key findings and identifies the key aspects that are demanded by most customers. The most crucial customer demands are summarized in the Service tables one and two since they reflect the most important customer demands. The customer feedback of 30 or more percent in green and the 20 or more percent in feedback are the most crucial to meet basic customer demand.

It is with very little surprise that the customer service reveals that the technological set-up is a basic feature. Customers demand a reliable internet connection and a flawless streaming link. Quality sound and a variety of camera angles to increase the viewing pleasure, are expected by all customers as a given basic need. Band interaction with their fans, possibly before, during or after the live event, are not considered an excitement criterion for a pleasing performance, but is, in all reality, a basic customer need.

Quantitative Customer Survey

Unanswered Services 1	Unanswered Services 2	Unanswered Services 3
Behind the scene videos	Stream available as download	Set-list voted by fans
Exclusive Streaming Merchandise	Exclusive Streaming Merchandise	Frequent Buyer Discount
Exclusive digital live show	Frequent Buyer Discount	Playing the hits of the band
Lyrics added in the stream	Exclusive Merchandise Items	Show available as DVD / Blu-ray
Bandbio available in Stream	Exclusive NFT's available	
Additional songs performed	Streaming event starts on time	
Pre-Show Band Event		
After Show Event		
Virtual Reality Show		
Show available as DVD / Blu-ray		
Customer Feedback of more than 30%		
Customer Feedback of more than 20%		
Customer Feedback of more than 10%		

Table 11: Unanswered customer service requirements, own source

11 CUSTOMER FOCUS GROUP WORKSHOP

The following chapter describes the customer focus group workshop findings held in October 2021, in Frankfurt, Germany. The chapter is divided, by the aspiration to conduct the focus group workshop and the selection of its participants. The customer focus group experienced a trial run before the actual workshop took place. The actual customer focus group workshop is divided in three sections: Brainstorming, Customer Journey Map and the 9 Windows Operator method.

11.1 Aspiration of the Focus Group Workshop

The customer focus group workshop, conducted on October 29th, 2021, in Frankfurt was designed with the following objectives:

- 1) To verify two customer segments (personas) that are currently unable or unwilling to use any digital online streaming event services.
- 2) To verify the most important obstacles of non-users of digital online streaming service and how these entry barriers can be reduced in future, with the overall target to create customer interest for these events.
- 3) To verify the most relevant customer needs and game-changers for performances and excitement attributes to capture current non-users of digital online streaming events.

Once the verification process has been finalized, the overall target is to name three unique selling propositions that can be applied to future digital online live events. These would result in an increase in the number of customers willing to attend such live events in the future.

11.2 Selection of participants

In September 2021, a written request was sent to the WhatsApp society “Heavy Metal Festival Mittelhessen” to actively seek out members interested in taking part in a customer focus group workshop. The research topic discussed in the chatroom was described, as digital online live events during the COVID-19 crisis and the future of digital online live events once the pandemic is past. At the time of the request, the society “Heavy Metal Festival Mittelhessen” consisted of 27 active members between the age of 34 and 48. The group is divided between 18 male and 9 female members. Out of the 27 members contacted, 18 members raised interest in taking part of the customer focus group workshop.

A short questionnaire was sent to the 18 group members to further narrow down and select the desired candidates. The questionnaire included the following questions:

- Are you able to attend a focus group workshop in Frankfurt Germany on October 29th in the afternoon for about two to three hours?
- How many rock and heavy metal festivals have you visited in the year 2018?
- How many rock and heavy metal festivals have you visited in the year 2019?

- Have you taken part in an online digital live streaming rock or heavy metal event in 2020 or 2021?
- What is your gender?
- What is your age?

Six potential participants responded that they would be unable to attend the focus group workshop, scheduled for the 29th of October, leaving twelve remaining potential candidates for the focus-group. Out of the remaining pool of candidates three replied that they had taken part of digital online streaming concert events in the past year. Since the focus group is intended to concentrate on current non-users, these candidates were disqualified. One last candidate had not attended any concerts in 2018 or 2019 and had apparently lost all interest in attending concerts in general.

The remaining eight candidates have never taken part of an online digital live concert event but had been frequent visitors to concerts in 2018/2019 and therefore have been selected for the customer focus group workshop.

The groups demographic consists of:

- Five male candidates between the age of 34 and 43
- Three female candidates between the age 36 and 40
- No participants are married but seven are currently in a relationship
- Five participants have one child – None of them have more than one child
- All eight participants work full time
- Five candidates live in an urban setting, divided up between the city of Frankfurt, Wiesbaden and Gießen
- Three candidates live in rural areas

11.3 Customer Focus Group Trial Phase

In early October, a trial run for a customer focus group was conducted in Graz, Austria with 2 volunteers. Both participants, one female, one male, were over the age of 40 years and had no previous online digital live concerts experience but were both open mind to the idea of participating in the future.

As summarized in Appendix 2 a test run was conducted in the following sections of the workshop:

- Introduction, Icebreaker, and general set-up of the interview, with a scheduled timeframe of 15 minutes.
- Brainstorming the understanding of digital online live events, with a scheduled timeframe of 15 minutes.
- Introduction, purpose, and concept of a customer journey, with a scheduled timeframe of five minutes.

- Conducting the customer journey, with a scheduled time frame of 20 minutes.
- Discussing the results of the customer journey group findings and compare the results between two groups, with a scheduled time frame of 15 minutes.
- Introduction, concept, and purpose of the 9 Windows Operator Tool, with a scheduled timeframe of 15 minutes.
- Preparing a 9 Windows Operator exercise and discussion of findings, with a scheduled timeframe of 30 minutes.
- Last questions and conclusion of the customer focus group workshop, with a scheduled timeframe of ten minutes.

In the trial run for the customer focus group workshop, the eight sections were scheduled with total time of a little bit more than two hours to allow for a relaxed group discussion and completion of the three key exercises: Brainstorming, Customer Journey Map, and the 9 Windows Operator Tool. As a result of the trial run and a discussion of both volunteers the following challenges were identified:

- The trial group identified that the general purpose of a customer focus group workshop needed a better explanation
- A brainstorming discussion of seven to-eight participants would require more time. A 15-minute scheduling window would allow each person only two minutes of dialogue.
- Explaining a customer journey map, in theory, would take about five minutes. The volunteers required a much deeper understanding of each step along the customer journey. The focus group would require a much more detailed explanation of what the meaning of “jobs to be done” would detail in the context of a customer journey map.
- Conducting, describing, and explaining the findings of a 9 Windows Operator exercise would require significantly more time. Explaining each different time-zone and system within the 9 Windows Operator would require at least 20 minutes alone.
- Both volunteers found the workshop challenging, but the topic interesting enough to participate actively.

As a result of the customer focus group work shop the following changes were implemented:

- The introduction and brainstorming exercise would require 30 minutes scheduled time.
- The customer journey explanation, exercise, discussion of findings and results would require 90 minutes.
- The 9 Windows Operator exercise would require 90 minutes to explain the tool in detail, conduct the exercise and discuss the findings and results.

For the actual customer focus group workshop, the total time window was changed to a maximum time of five hours:

#	Agenda - Raising Ideas	Start	End	Duration
1	Introduction & Set-Up	15:00	15:15	00:15
2	Brainstorming Concept & Ideas	15:15	15:45	00:30
3	Break	15:45	16:00	00:15
4	Customer Journey Map Exercise	16:00	17:30	01:30
5	Break	17:30	17:45	00:15
6	9 Windows Operator Exercise	17:45	19:15	01:30
7	Break	19:15	19:30	00:15
8	Discussion, Last Questions & Conclusion	19:30	19:45	00:15

Table 12: Customer Focus Group Workshop Timetable, own source

11.4 Customer Focus Group Workshop Event

The customer focus group event took place at a private resident in Frankfurt, Germany on October 29th, 2021. In a two-room setting the attendees met at 2pm for a group lunch.

At the beginning, the initial situation, the workshop goals for the day and the characteristics of idea generation were explained to the participants. To start the workshop, the "rules of the game" for the following creative work were read out.

The "rules of the game" are as follows:

- Quantity before quality
- You are a "Creative Team"
- Let your imagination run free
- Everything that happens in this room stays in this room
- There are no bad ideas¹⁴⁰

Part I: Introduction & Brainstorming

The eight participants of the customer focus group were introduced to the overall topic of the workshop.

Due to the current COVID-19 challenges visiting concerts has been a challenge for many fans. Many bands have offered digital online concerts and hybrid live events due to the lack of touring opportunities. In the focus group discussion, the key question is to discover customer expectations of digital streaming and hybrid events. The group will discuss the services offered and what would interest the participants in future digital live events. It will analyse why the focus group members have not used the service in the past and what current obstacles are stopping the groups participation? Would the group consider using an online digital live event opportunity in the future? What services would need to be provided?

The customer focus group will brainstorm possible innovation or creative ideas that could be considered an advantage or excitement factor in using this service, in the future.

¹⁴⁰ Cf. Hennink (2014), pp. 28-33

The focus-group discussed their knowledge-level of digital live event:

- A band is playing in an empty live venue, customers can participate via an online link.
- All members were aware of the digital live event of the Heavy Metal Wacken Festival in 2020.
- All members knew about the digital virtual Nightwish concert in the summer of 2021.
- Assumptions of poor sound and visual quality during digital live events were raised and are widely shared by all members.
- Group members discussed that they were concerned that the internet connection would not be reliable.
- There is a general consent that just providing a digital online link would not convince them to join a digital live event.
- All participants see a value in watching a digital live event directly from home, conveniently from the couch with snacks and drinks.
- All participants liked the idea of creating a group event to view a digital live concert together.
-
- All participants mentioned that they would miss talking to friends and “smell” the venue during a digital live event.
- Most participants liked the idea of balancing their free time according to personal needs.
- All participants liked the idea not having to travel and staying home.

Part II: Customer Journey Map

Once the customer focus group completed the brainstorming exercise, a short break followed, the group then moved to the customer journey map exercise. The entire exercise lasted for 90 minutes and was broken down in separate sections:

- 20 minutes: Explaining the customer journey map and its components
- 40 minutes: Customer journey map workshop
- 30 minutes: Combining the customer journey, analysing the customer journey workshop, and sharing the most significant findings.

The customer journey map was explained as an exercise, the group as customers, would take when considering joining a digital live online concert event, regardless of whether the event is offered as a purely digital live event or as a hybrid live event that includes some actual fans on site.

As a next step, the focus group was divided in two sub-groups. One group discussed and analysed the time prior to the event taking place. The “Pre-event” phase would look into the customers behaviour before a digital live event is even scheduled or officially announced and while the “Pre-order” phase would summarize the customers behaviour once a digital live event became available.

The second customer focus group conducted the “Day of the event” phase and the “Post event” phase. The “Day of the event” phase would discuss all aspects of the customer behaviours, emotional state, fears, and expectations when a digital online event would take place. The purpose of the “Post event” phase is to understand what the customer is doing after the digital live event has been completed.

In the last 30 minutes of the customer journey map exercise, both groups presented their findings and explained their thought process. Both groups compared their findings and added additional aspects to each other’s phases of the customer journey map.

The findings of the customer journey map are summarized in Table 13, the actual board and post-it notes findings are presented in the customer focus group impressions section of Appendix 3.

Journey Phases throughout the customer journey map:

a) Jobs To Be Done:

In the “Pre-event” phase of a digital online live event, customers want to be very familiar with the bands day to day activities and insist on timely and frequent band to fan communication. Customers themselves see their job in knowing the most current musical outputs of their favourite artist, knowing the music, track list and album artwork.

In the “Pre-order-phase” customers see the most significant job to be done is to fully understand all ticket options for the digital online live event. They want to evaluate the financial benefit in comparing regular ticket prices with the ticket prices of digital live events, including savings occurred by reducing travel expenses. The customer job includes evaluating “early-bird” and “VIP” ticket options and various exclusive merchandise bundles available in the pre-order phase. Events, falling in a similar timeframe, do get compared and evaluated to decide which events hold the most value. One of the most significant jobs to be done is to share and to promote an upcoming event with friends and other fans.

At the “Day of the event” phase customers see their job in creating a comfortable and relaxing environment at home to participate in the event. One focus is, on having a variety of snacks and drinks at home and to watch the online event from the couch. The customer job here is to have one easy access link to participate in the live event, while preparing its own technical device for the perfect sound, visual effect, and internet stability.

In the “Post event” phase customers do not simply want to turn off the live concert transmission and return to their lives. For customers, the job is to share the memories of the event that took place, exchange the experiences of the event, the band performance, venue se-up, discuss the bands play-list and evaluate the event. Customers see the most important jobs as being; to ask for signed autographs and to purchase exclusive merchandise directly from the band and online event.

b) Channels and Touch-Points:

The customer age of the focus group lies between the age of 34 and 43 years. In the “Pre-Event” and “Pre-Order” phase the group still relies on traditional media outlets to stay informed about live events. The focus group relies on print advertisement, particularly the rock and heavy metal magazines: Rock Hard, Metal Hammer, Deaf Forever, Sonic Seducer and Legacy magazine, to receive information about upcoming digital live events. For social media communication channels, the customer focus group relies heavily on the bands and record labels Facebook and Instagram channel to stay informed about a digital live event. TikTok, Snapchat and other social media outlets are not used by this group. All participants react positively to band video event teasers and music video releases that promote a live event and use these to prepare for a purchasing decision.

During the “Day of event” phase the focus group would be interested to use all band, booking company or record label outlets to purchase online tickets for a live event, however they feel uneasy if there are too many outlets to choose from and would prefer having one outlet to purchase tickets.

The channels and touch-points for customers in the “Post event” phase would be in the need to use digital band merchandise booth streams to directly purchase merchandise from the band. The focus group would like to be able to have direct contact with a band after the event for a questioning and answering post performance event. More importantly, customers would like to see fan to fan chat functions as a performance driver.

c) Desires and Expectations:

In the “Pre-event” phase, customers require a fixed date for the event to be scheduled and communicated in advance to allow customer to book the date of the event. Ideally, customers would prefer if an event were scheduled once a week or month at a certain time to allow fans to have more routine in watching online digital live events more frequently.

For both the “Pre-event” and “Pre-Order” phase, customers wish that they could stay connected with their own group of friends to organize the live digital event as a group experience. Fans request a ticket or chat room function that allows for a group to communicate directly and watch the event together. Additional desires are to have access to exclusive merchandise items.

During the online digital live event customers liked the idea of watching an event from the comfort of their home, enjoying a selection of snacks and drinks. The focus group’s desire is to have the online digital event as interactive as possible. Chat functions between fans during the event are a basic function that should be provided at every event. Performance factors are the possibility to digitally pause the event for short bathroom breaks, having different camera functions that create a visibility advantage compared to actual live events and the band playing songs based on digital voted playlist. The focus group would really enjoy it if during the event, a member of the band crew or manager would provide background information in the chat-function. Another idea is if background information, lyrics and song and album history are added in the streaming link while the band is performing as seen often during music shows on mainstream television.

The most important expectation in the “Post event” phase for customers in the focus group is to have exclusive access to band merchandise. Ideally the band should appear at a digital online merch-booth to talk to fans and to sign merchandise purchased.

d) Challenges and Uncertainties:

The most significant challenges that currently obstruct the focus group for participation in online digital live events are being unsure when these events are scheduled and if they will occur on time. This fear is combined with uncertainties in the “Pre-event” phase of if the home technical set-up and internet connection allows for a satisfying viewing experience. The focus group members currently with a relationship status of being “single” are displeased that online digital events would not allow them to meet potential partners.

In the “Pre-order” phase customers are worried that the actual digital live event is a simple pre-recorded show in an empty venue, making for a “boring” digital event. All focus group customers are concerned that the digital access to the online live event will be difficult with many log-in steps. Purchasing online tickets should be simple and ticket purchase possibilities, along with online payment options should not be overwhelming and drastically simplified.

Some of the concerns during the “Day of the event” phase are a continuation of the previous phases. The key uncertainty is a boring live event, with the band performing poorly, while audio and sound options are reduced to a minimum. A major set-back for all members of the focus group would be if ticket purchase options suddenly become unavailable or if the online streaming link is incorrect or difficult to access.

A key fear to all members of the customer focus group is the lack of ability to create memories of the experienced live event. In the “Post event” phase customers are concerned that they are unable to share these memories with other fans who took part of the digital live event. A lack of fan-to-fan chatroom in the technical set-up is entirely undesired. A key disappointment to all members of the focus group would be if the band did not take the time to meet their fans digitally after the event, to answer questions and share the performance experience.

e) Experience and Emotions:

During the “Pre-event” phase, the emotions are mixed in the customer focus group. There is a strong desire to enjoy and take part in a live musical event and listen to some of the band’s new songs. At the same time, all members are concerned that a digital live event would create uncontrollable technical difficulties that would turn a live event into a negative experience. There are negative emotions anticipated. They had a feeling that watching a digital live event alone would cause them to feel lonely. Finally, a negative concern could be that the audio sound must be reduced to a volume that would take away any live audio feeling, out of respect for the neighbours.

The overall negative emotion of fear that the technology of the digital online live event would be poor, or the customers own technological set-up is insufficient becomes the key emotional driver in the “Pre-order” phase. Some customers are melancholic that they would miss the feeling and smell of an actual live event venue.

Some of the negative emotions during the actual digital live event are like the ones in the “Pre-order” phase. Customers would miss the smell of the actual venue, the feeling of missing fans and friends and all emotions that go with the excitement of attending a live event.

In the “Post event” phase, customers would like to be able to “brag” about how special the digital live event was, with other fans and the rock and heavy metal community. The focus group would like to be able to create a questionnaire or other feedback function that can directly be submitted to the band or booking company.

f) Opportunities:

The greatest opportunity for the customer focus group is the interest and desire to take part in a live music live event regardless of whether the event is an actual on-site event or a digital streaming event. This desire is apparent to all eight members of the focus group in the “Pre-Event” phase. There is an enormous anxiety about attending large group gatherings, that can be described as a developed social anxiety and the direct result of the COVID-19 pandemic. The idea of watching a digital live event conveniently, directly from home with different camera views and satisfying sound is attractive to all participants.

In the “Pre-Order” phase all focus group members wish for one direct ticket outlet and log-in link to the digital live event, for easy access. They would enjoy the idea of receiving hard-tickets or VIP tickets that could be kept as souvenir or collector’s item even if the live music event is held digitally. All customers see a digital live event as a great opportunity for single parents or fans that are unable to take part in an actual live event for a variety of reasons. Since some focus group members share one vehicle per household, they like the opportunity not to need a vehicle, to save fuel, parking, and other traveling expenses. The funds customers save by not being on-site for events, could be invested into the purchase of exclusive merchandise items.

During the online live event, the customer focus group would like to be treated like VIP customers. The most significant opportunities are available when there is a direct band to fan contact and communication available. Bands and bookings companies should provide chatrooms to start conversations and answer questions before and after the digital live event. Customers would be excited to receive pictures of the band’s backstage set-up as part of a fan meet and greet, along with general behind the scenes photos and merchandise booth services. The customer focus group feels that album release shows would be a fantastic opportunity for a digital live event since it would create the most interest in taking part in the event. There is an increased interest throughout the focus group to receive customized and limited merchandise items of high quality that have been environment friendly produced.

In the “Post-event” phase the customer focus group would see the greatest opportunity in providing the online digital live event as a physical carrier (CD, DVD or Blu-Ray) purchase option. The customer focus group would like to be able to have access to individual online videos of the event and purchase options for CD, DVD or Blu-ray disc editions. In general, exclusive shopping opportunities for merchandise individual items and bundles that create a “memory” of the event are considered an opportunity for bands and booking companies. Here again customers would expect to be offered customized and limited merchandise items of high quality that have been produced in an environment friendly manner. The focus

group participants would see opportunities for the band and booking companies to present future online digital live events and offer tickets at a discount.

Digital Live Event Customer Journey Map

Journey Phase	Pre-Event Phase	Pre-Order Phase	Day of the event	Post Event Phase	
Jobs To Be Done	<i>Awareness</i>	<i>Consideration</i>	<i>Decision</i>	<i>Delight</i>	
	Keeping informed with band developments	Evaluating "early-bird" & "VIP" ticket options	Watching the show	Get signed autograph	
	Knowing the new album	Evaluating ticket & merchandise bundles	Great Audio Sound	Purchase merchandise	
	Becoming familiar with the new band album	Evaluate saved travel and event expenses	Many Cameras	Discuss with friends the show and venue set-up	
	Clear band communication	Review of possible live tracklist	One Step streaming link access	Discuss with friends the playlist and band performance	
		Comparing event with other alternative events	Being Relaxed and watching event from home	Upload pictures and videos to social media	
		Exchange with fans and friends	Food and snacks available	Having memories of the streaming event	
			Prepare technica set-up	Exchange memories with friends	
	Channels / Touch-points	Band social media channels	Band and record label announce an event	Purchasing ticket directly from venue	Digital Band Merch Booth
		Instagram	Band releases a new music video to promote the event	Purchasing ticket directly from a ticket outlet	Band Q&A
Homepage		Band releases tour video teasers	Purchasing ticket directly from the label	Fan chat-room	
Facebook		Band releases personal messages to fans	Purchasing ticket directly from the band		

Band and record label newsletter	Booking company announces event	Streaming App
Band and record label social media channels	Print Advertisement of even in magazines	Youtube & Vimeo
Rock / Heavy Metal Community discussion groups	Radio & TV	Band webpage

Desires & Expectations

Dates need to be known in advance	Being able to invite friends for the event	Comfortable evening at home	Exclusive Merch available
Fixed weekly date and time for various events	Friend invitation option	Favorite food and drinks at home available	Chance to meet the band at the digital merch booth
Not having to watch alone	Various pre-order functions and purchase	Many exclusive camera functions	Having band sign merchandise
Update friends and invite others		Band member or or crew chat during songs with fans	Unable too conserve / keep memory of the event
		Band or Crew provide background information	Unable to exchange the experience with fans
		Direct interaction with band	
		Playing fan selected play-list	
		Chat function with band and fans	
		Time-shift to stop the event for a break	
		Background info on songs and lyrics	

Challenges /Uncertainties	Information overflow from too many channels	Available paying options are difficult or unavailable	Unreliable Internet Connection	Band does not meet fans
	Date changes or uncertain	Ticket purchase options are overwhelming	Poor sound, audio and cameras	Exchange with other fans is impossible
	Poor internet	Pre-recorded event not live event	Live event feeling does not happen at home	
	Technical set-up	Boring digital venue	Boredom	
	Not being able to meet the other sex	Technical hurdles are overwhelming	Poor sound and visibility during the show	
			Low quality band performance	
			Tickets are unavailable - event is sold out	
			Too difficult to sign up and/or use streaming link	

Experience / Emotions	Fear of technical failure	Overwhelmed with technology level	Live event feeling is missing	Desire to exchange the experience and brag a bout
	Anticipation for event	Feel of event location and smell is missing	community feeling is missing	Feedback function
	Feeling alone		feel and smell of the venue is missing	Customer experience questionnaire about the event
	Anticipation to hear new songs			
	Live not alone and have to be quiet			

Opportunities	All live events are great	One streaming link	VIP Treatment during the event	Event available on physical carrier
	Fear of too many people / social anxiety	One ticket outlet	Backstage Meet & Greet	Exclusive merch bundles
	Great View and audio sound	Hard tickets / VIP tickets	Direkt band contact	Buying memories
		Single Mum	Band Q&A	Exclusive Shopping
		Not mobile, comfortable from home	Digital streaming behind the scene, backstage and merch booth	Providing information about origin and quality of merchandise
		Saving money on travel and high event expenses	Providing information about origin and quality of merchandise	Video clips packing ticket and merchandise bundles

Table 13: Customer Focus Group Workshop “Customer Journey”, own source

Part III: The 9 Windows Operator

Once the customer focus group completed the customer journey exercise, short break followed, then the group moved to the 9 Window Operator exercise. The entire exercise lasted for 90 minutes and was broken down in separate sections:

- 20 minutes: Explaining the 9 Windows Operator method and its components
- 50 minutes: 9 Windows Operator workshop
- 20 minutes: Analysing the 9 Windows Operator method and sharing the most significant findings.

The 9 Windows Operator methods was explained as an exercise to the customer focus group The group would conduct the 9 Windows operator method from the point of view as a customer visiting on online digital live event, regardless of if the event is a standalone digital live event or a hybrid live event that includes some actual fans on site. It was explained to all members of the focus group, that the 9 Window Operator method would function as an additional exercise to the customer journey map, with the purpose to identify customer opportunities, that have not been named by the previous exercise.

As a next step, the focus group was divided in two groups. One group discussed and analysed the time before an actual event would take place. The “Pre-event” phase would look into the customers behaviour before a digital live event is even scheduled or officially announced, while the “Pre-order” phase would summarize the customers behaviour once a digital live event would became available.

In the last 20 minutes of the 9 Windows Operator method exercise, the groups presented their findings and explained their thought process for each section zooming in and out in each section of the present, past, and future as well as system, sub-system, and super-system.

The findings of the 9 Windows Operator method are summarized in the Illustration 23, the actual board and post-it notes findings are presented in the customer focus group workshop impressions section of Appendix 3.

Present System:

The customer focus group started the 9 Windows Operator workshop in the Present System of a digital online live event. The focus group described that while watching and listening to the event, a key activity would be to receive information about the band, albums and lyrics of the songs performed. They would research the history of the band, albums, and lyrics.

Past System:

Before the actual online live music event, the customer focus group would research the various exclusive merchandise bundles available, in addition to personalized merchandise items, signed by the band. The customer decision to join an online digital live event or decide against the service provided, depends heavily on the ease of registration for the digital event, and its simplicity to access the digital link provided. Payment options should be uncomplicated, ideally with one website to complete the payment process. The customer focus group also identified the customer preference for regularly scheduled events that are free of charge.

All Past System requirements, as customer needs could be opportunities for booking companies and band to convince customers to join a digital live music event.

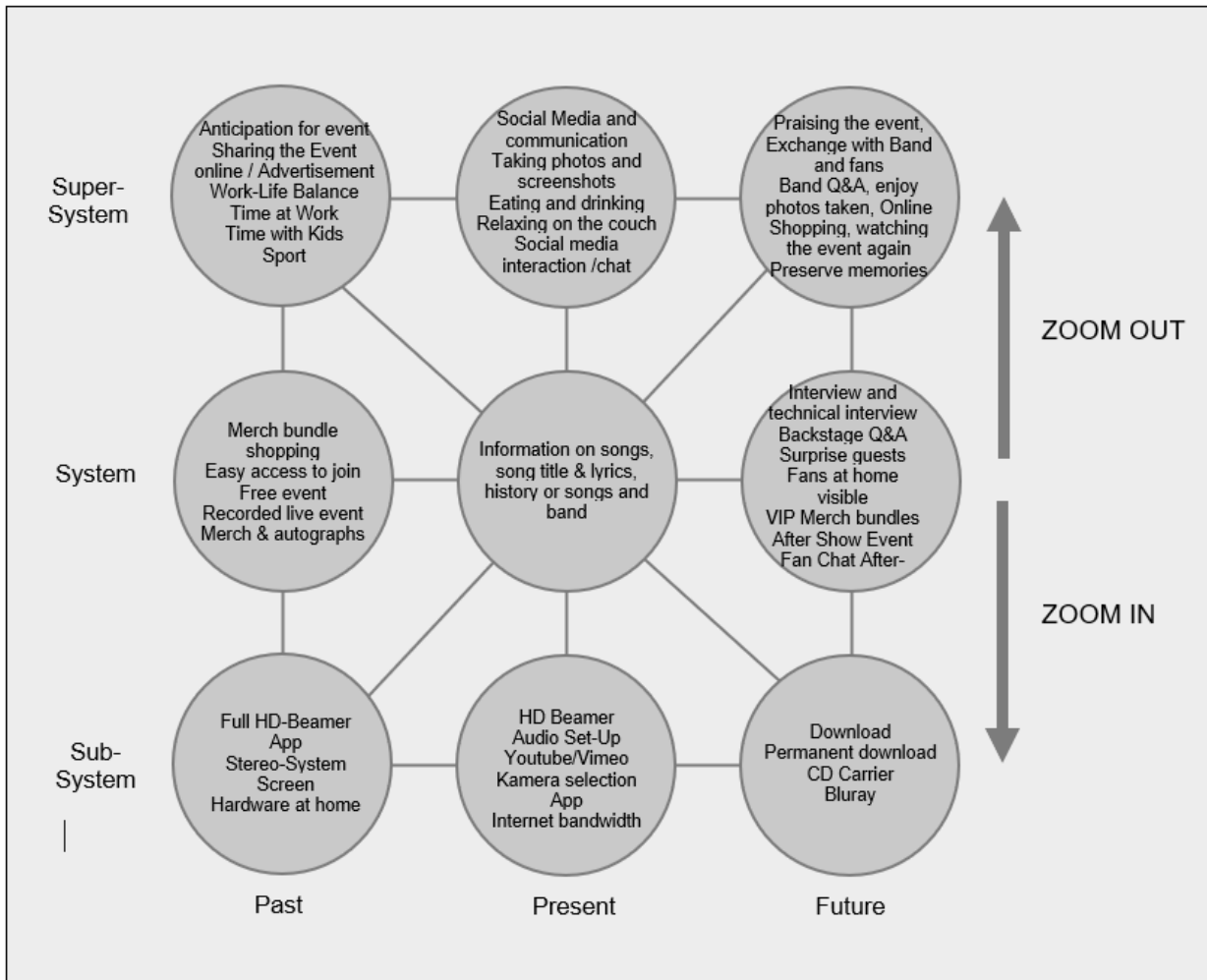


Illustration 23: Findings Focus Group 9 Windows Operator, slightly changes and own illustration

Future System:

The customer focus group workshop identified a variety of possibilities to reach customers and create performance and excitement attributes, once the actual digital online live event has been completed. Customer loyalty and product life cycle enhancement opportunities were identified by providing online band interviews between the band and fans. A scheduled question and answering event that explains the process and making of the live event just experienced including the technical set-up, would be of interest to customers. A band could provide surprise guests that join the post event stream. Customers would be strongly interested in having access to VIP or alternative exclusive merchandise items. Providing the technical set-up for fans to be able to chat with other fans that experienced the live event, is an activity all focus group member's demand.

Past Sub-System:

The Past Sub-System was analysed from a customer perspective in the customer focus group. Half the group, with its members technically affine, would like to invest in full high-definition beamers, screening hardware and better sound-systems to allow for a more realistic live experience. Ideally, the home digital live event should be experienced. The other half of the focus group members prefer a simple one step solution in form of an application or link to watch the live event conveniently from a smart-phone or tablet. High quality sound and visuals are not a driver for increased customer satisfaction.

Past Sub-System:

During the Past Sub System phase the customer focus group identified the need to have a reliable and strong internet bandwidth. The group watching the digital live event from a smart-phone or tablet required the application and access link of the digital event to be uncomplicated and easy to access. There is a preference for the band or booking company to share the digital online live event via YouTube or Vimeo since all customer focus group members are familiar with these channels. The technically affine group members expect the band or booking company to provide a variety of camera angles.

Future Sub-System:

The customer focus group mutually believes that the digital live event should remain available for repeated viewing pleasure. Members of the focus group mentioned that they would like to watch the event a few times in the future. Alternatively, bands and booking companies should offer a CD, DVD or Blu-ray sound carrier that can be purchased by fans, after the event has taken place.

Present Super-System:

Next, the customer focus group moved on and zoomed out to the Super System. In the Present Super-System, the customers, once relaxed and comfortable, watch the digital online event from home, while enjoying snacks and drinks from the couch. The customers would be able to use various band to fan, and fan to fan chat functions while watching the event. In general, communication between fans and the band during the live performance necessary to keep all customers entertained during the event and provide an incentive for customers to watch the full event.

Past Super System:

In the Past Super System there is a high positive anticipation for the digital live event. Customers are generally very excited for a live musical opportunity to take place. Customers like to share the possibility of the event with friends and other fans. The venue, band set-up and selection of songs are discussed in all social media outlets. Customers recognize various forms of social media and print advertisements that promote the upcoming digital event. The customer focus group would evaluate how the attendance for a

digital online live event can be scheduled and if it creates a conflict with work, family, sport, or other leisure time commitments. Ideally, a digital live event should be scheduled in advance or should be offered as a regular reoccurring event to avoid all scheduling conflicts.

Future Super-System:

As a last step, the customer focus group zooms to the Future Super System. Here the group discussed all activities that take place after the actual live digital online event has been completed. The customer activities in that system include digitally interacting with other fans about the experienced event. Fans evaluate the bands performance and exchange photos that were taken online. The key activity is to preserve the “memories” of the live event and exchanges these feelings with other fans. Some customers will choose to watch the live event a second time. Here again, customers would like to be able to have a question and answering service initiated by the band and are interested in purchasing.

Part IV: Last Questions and Conclusion of the Customer Focus Group Workshop

All participants found the topic of the customer focus group highly interesting since it complemented their interest in rock and heavy metal music and live concerts. When asked, how many would consider watching a digital live concert in the future, following the workshop, seven participants replied they would be interested if some of the customer services discussed during the exercises would be provided by bands and booking companies. One participant would prefer to wait until “real” live concerts would be possible again but would re-consider if a digital streaming event would be organized as a group event from home. All participants feel that all online digital live events should be free to attend and paying more than 20 Euro for online tickets would be dissatisfying. All customers would be willing to spend between 50 and 100 Euro for exclusive merchandise items. After the last topic the customer focus group workshop ended.

12 FINDINGS AND RENDITION OF THE QUANTITATIVE CUSTOMER SURVEY AND FOCUS GROUP WORKSHOP

The following chapter describes two customer segments developed based on the quantitative customer survey. An interpretation can be complex since an analysis on the findings of nearly 40 participants, based on 25 research questions, allows for multiple variables that could present a customer segment. The two-customer segment represent a cross-section of all findings. Creating two personas of possible future customer segments which summarized the customer focus group workshop findings was an easier task. The research findings could be combined with the emotions, reflections but more importantly the direct face-to face interaction with all 8 participants. The chapter concludes with a summary of the basic customer needs and customer attributes, that are attractive and delighters for current and future customer segments.

12.1 Customer segment creation based on the quantitative customer survey and findings

Personas Customer Survey:

The results of the customer survey identify, in the Illustration 24, below, persona “Florian Jörg” as one of two most important customer segments of fans who currently consume digital online live events or have done so in the past 12 months. This persona is highly interested in heavy metal live music events and has visited five or more events in the past 12 months, while spending €20 Euro or more on ticket fees per event. This customer has watched all events alone but would be interested in watching future events in a small group setting. This customer segment would consider digital online live events in the future when the distance from home to the venue becomes a challenge or a band or booking company provides an album release show outside of Austria. This customer segment is likely to substitute digital online events with traditional live events once the COVID-19 crisis has passed unless a band or booking company can dissolve basic customer need challenges and offers attractive and exciting services that will make this customer segment reconsider. The customer segment is highly interested in technology and would consider using the home technology for digital online live events as a group event. Exclusive merchandise, including shirts or an audio CD of the event, offered by a band or booking company during the live event would be purchased by this customer segment. The biggest challenge and strongest indicator for dissatisfaction are a poor technological set-up of the digital event, including the digital streaming link itself but also the sound quality and lack of different camera angles.

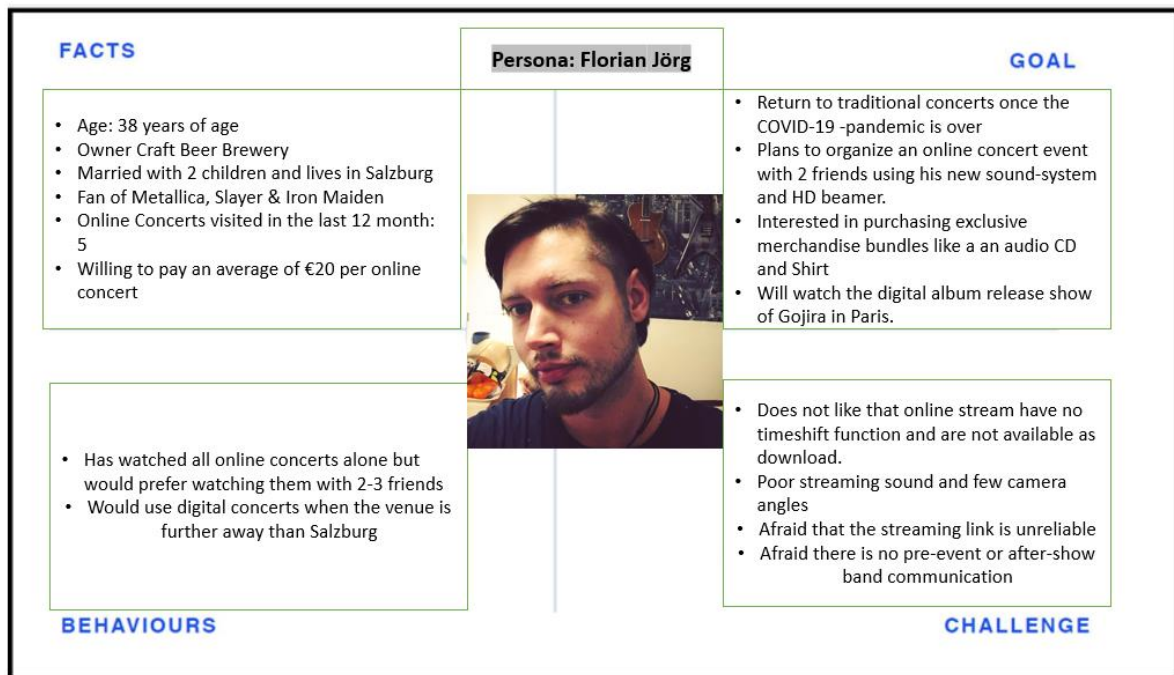


Illustration 24: Customer Survey Persona 1, own illustration

The results of the customer survey identify, in the Illustration 27 below, persona “Silke Krämer” as one of two most important customer segments of fans who currently consume digital online live events or have done so in the past 12 months. This customer segment is mostly female and with an average age of 26 years younger than the average participant in the customer survey. As a key fact, this persona has consumed a digital online rock or heavy metal live event only sporadically, one or two times in the past 12 months, and is mostly unwilling to pay a ticket price for an event. €5 for ticket price has been paid on average, but most past events have been free of charge. Like persona one of this customer segment, there is an interest to watch digital live events in future as a small group and in general the group is interested in chat functions with other fans or the band before, during or after a live event. Persona “Silke Krämer” would be interested in watching digital live events in the future to balance her free time between work and family. Along with an expectation for digital online events to be highly affordable or ideally, free of charge, this customer segment would also spend less money on exclusive merchandise items compared to persona one. This customer segment is mostly interested in the entertaining effect of a digital online event and is therefore concerned about a boring live atmosphere or the band performing poorly during the event. One big technological challenge is all difficulties resulting from streaming interruptions.

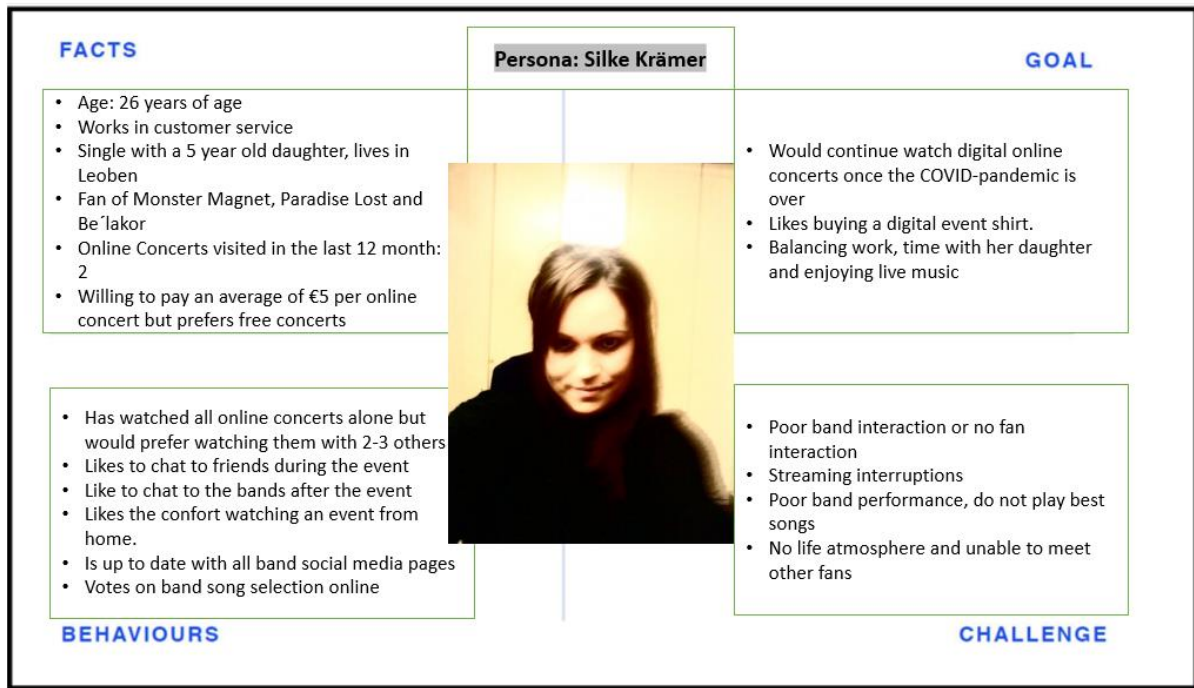


Illustration 25: Customer Survey Persona 2, own illustration

Personas Focus Group Workshop:

The most important customer segments, in form of personas derived from the customer focus group workshop are summarized in the following pages in both Illustration 26 and 27. Both customer segments are currently non-users of digital online rock and heavy metal live events but would both be interested in using the service in addition to traditional live music events provided all basic customer needs are fulfilled and a band or booking company will create attractive and excitement attributes to capture both customer segments.

Persona “Jens Lederer” has never streamed a digital live event in the past and would not be interested in paying for an online ticket in the future. However, Jens would be interested in spending more money by purchasing exclusive and customized merchandise items, if offered by a band or booking company. This customer segment represents the members of the customer focus group workshop who are highly interested in all technological gadgets. They have very little concerns about accessing a digital live stream and would invest in technology like high priced sound system to create a home set-up that comes close to an actual live event.

“Jens Lederer”, like many members in the customer focus group, would be interested in creating a group event while watching a digital online live event, by inviting four to six of their friends over to participate. This customer segment is not interested in watching a digital streaming event alone from home. A combination of having comfort at home with snacks and drinks and social anxiety due to the COVID-19 pandemic further create an interest for digital online live events. In general, this customer segment would like to watch the digital live event a couple times or ideally purchase a CD, DVD or Blu-Ray edition of the event, along with other exclusive merchandise items. Emotions, particularly the feeling of belonging to the event are the desire of these customers and underlines the interest of purchasing a lasting memory of the event.

The biggest challenge of this persona are the emotions and feelings of an actual event, the smell of the venue and missing friends and fans that typically could be met, while enjoying ones favourite band. Being unable to conserve positive memories, even being able to brag about the concert, creates an emotional challenge.

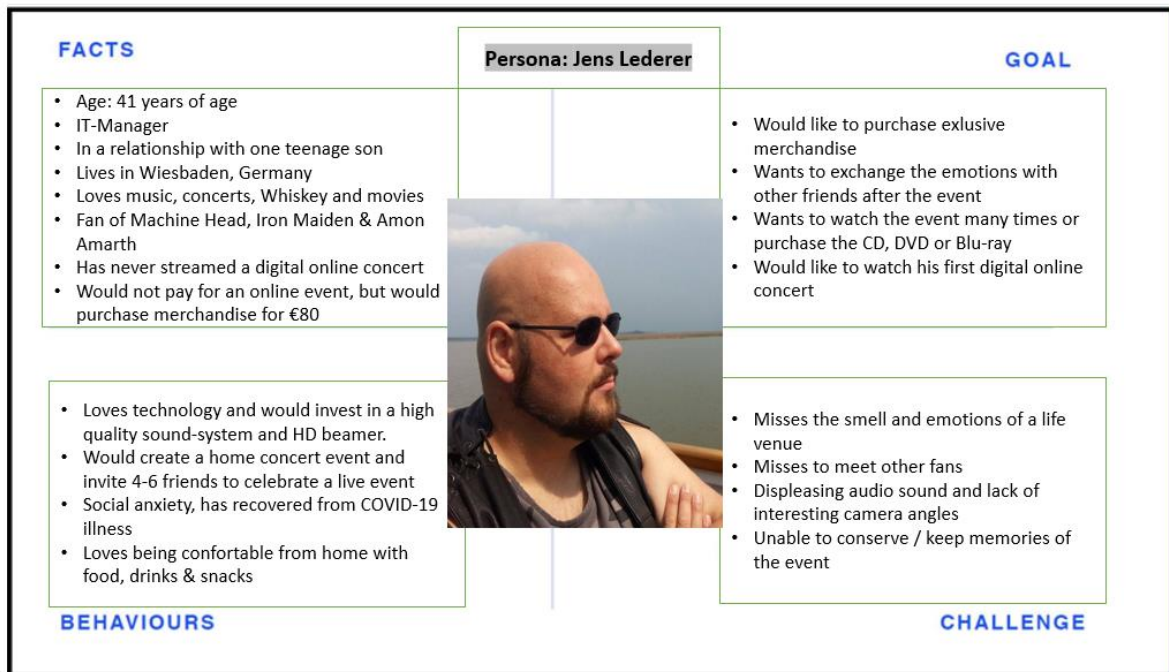


Illustration 26: Focus Group Persona 1, own illustration

The second customer segment identified at the customer focus group workshop is the persona “Annekatriin Müller” summarized, below, in Illustration 27. Annekatriin has never participated in an online digital rock or heavy metal event but would be interested to do so in the future if the event is free. In contrast to persona 1, this customer segment would be interested in purchasing exclusive merchandise items but would spend significantly less money on doing so. Consuming a digital live rock or heavy metal live event is mostly done out of the behaviour to receive entertainment for a couple of hours. The digital live event should be accessible as an easy, one step procedure. The persona is not interested in high tech sound or visual elements but watches the live event on a smartphone or tablet to become familiar with the band’s newest musical outputs. Since this customer base is struggling with the daily work-life balance, the event is mostly watched once. There is, however, a strong interest for some merchandise shopping, direct band communication before, during and after the live event and backstage band footage, soundcheck and while the band is preparing for the digital live event. The customer segment is highly interested in receiving background information on the band, band biography, albums and lyrics of the songs played.

The biggest challenges to the customer segment described, are all aspects that require investing time in technological set-ups. Having too many tickets payment options, and lengthy procedures to access the event streaming link, create dissatisfaction to these customers. This persona would discontinue choosing to watch a digital live event a second time if these challenges are encountered. Since entertainment is the key behaviour driver, the customer group strongly dislikes a boring pre-recorded “live” event, a weak band performance and if the band ignores their digital fans at home.

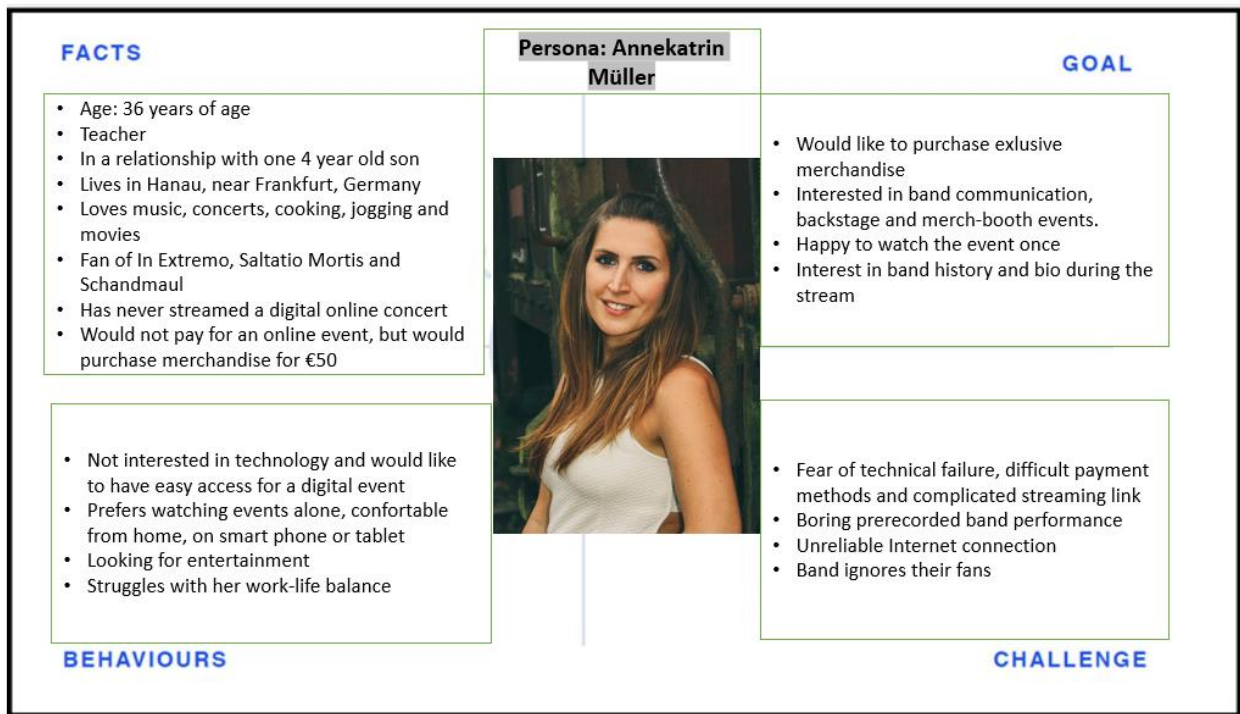


Illustration 27: Focus Group Persona 2, own illustration

12.2 Assessment of service development and customer satisfaction based on the Kano model

The following section summarizes the customer survey and focus group findings for a digital online rock or heavy metal streaming event, broken down in the different categories of the Kano Model.

Must-be quality or Basic quality service requirements:

A digital online streaming event will always encounter some limitations compared to a traditional concert event. The group dynamic when attending an event collectively as fans or friends, the smell of the venue and the celebration when a band plays the most popular songs of a new album, can never be replaced by a digital live event.

Digital online rock or heavy metal live events have proven to be of interest to customers during the COVID-19 pandemic and could continue to be so in the future. The biggest challenge identified throughout the research conducted, is the band or booking companies current fan misunderstanding of the service level provided for these events. The common understanding that a band’s popularity and assumed natural fan interest in the rock and heavy metal music industry is highly overrated. Providing a basic digital streaming option may have only been acceptable to fans during the COVID-19 pandemic but will become entirely unattractive once the pandemic is over. The customer survey proved that many customers have consumed a digital live event seldom in the past 12 months and most fans are not excited about using the service

again. The focus group, as current “non-users”, have yet to experience a poor digital online rock or heavy metal event but there are already concerns about the basic customer service requirements, once such service is tested in the first place.

The requirements listed below, are not additional services or “nice to have” content for a band or booking company that typically would attract 100 – 1000 customer during a traditional live, but basic requirements that should be made available for every digital online event to dissolve customer satisfaction and increase the chances a customer will return for a future digital event.

- Reliable and one step digital audio stream set-up
- Ticket prices should be free, pay as you decide or the lowest fee possible
- Pre-recorded live events are not digital live events
- Customer communication and instructions to reduce uncertainty of which viewing hardware is needed to participate in the digital online streaming event
- Digital live events should always start on time
- Quality sound and a variety of camera angles are mandatory and most venue can provide this technical se-up today
- A band needs to perform on a high level and enthusiastically, regardless of their own displeasure for digital live events
- Band communication and interaction with fans before, during and after the event is mandatory
- A fan-to-fan communication channel for communication needs to be provided

Indifferent quality:

Surprisingly in the research findings both customer groups, current users and current non-users are indifferent when it comes to the possibility of saving money by watching a digital live event from home. When compared to higher ticket prices for on-site live events, expensive food, drink and beverage prices at the venue and parking and fuel expenses occurred while traveling to the event, the cost saving benefit is mostly irrelevant to customers.

In addition, only some customers value the benefit of saving time when deciding to watch a digital live event instead of traveling to the venue. There is some interest, mostly from female participants, single parents or when a balance between work and leisure time is in demand, however there is little indication that saving time is a benefit at all. It does not create satisfaction nor dissatisfaction.

Providing a digital download code or the lack of one creates neither satisfaction nor dissatisfaction. Many customers are happy to watch the event once, others in needing to “conserve” memories would prefer a more permanent memory in form of exclusive event merchandise or an audio CD, DVD or Blu-Ray version of the event.

Reverse quality:

It was assumed, that customers would prefer, to have multiple outlets where digital event tickets can be purchased. In the research conducted, many customers found this mostly confusing and would prefer to have one outlet where tickets and possibly merchandise can be purchased. An overwhelming amount of ticket outlet service offerings creates dissatisfaction to customers.

Some advertisement, provided during the digital online live event, intended to supply customer offerings, to support their current needs, do create interruptions to customers watching the event, resulting in customer dissatisfaction.

One-dimensional quality:

The customer survey group of current digital online streaming participants, and the customer focus group of current non-users, identified that providing a specialty show for a digital live event creates customer satisfaction. This show could be an event that allows a digital online audience to vote on the track list to be performed by a band or when a band offers to play a “best-of” live event. Customer satisfaction is heightened when the event is located outside the customers own country, an exclusive album release event or if an onsite or hybrid event is sold out. Most customers would appreciate it if their fan loyalty would be recognized in the future, by receiving discounts for future events as part of a frequent buyer program.

The most attractive attribute to customers would be the ability to purchase exclusive merchandise of the digital event. Fans see their “job to be done” in conserving the memory of a special digital online live event. Purchasing exclusive shirts, CD’s, signed band cards, band patches and band flags clearly creates high customer satisfaction and off-sets some of the disadvantages of an online live event. Fans would ideally request to pay very little for the actual online ticket but would off-set this lack of source of income, for band and booking company, by spending between €50 - €100 per customer on additional merchandise purchases.

- Specialty show provided by a band or booking company
- Album release show provided by a band or booking company
- Song selection or greatest hits voted online by fans
- Frequent buyer discounts on future digital live events
- Attractive exclusive and customized band merchandise

Delighters / Attractive Quality:

The findings of the quantitative customer survey and the focus group workshop identified some important customer service opportunities for bands and booking companies when digital online rock or heavy metal events are offered. None of these service offerings are currently provided, and all of them could be applied for medium size bands and bookings companies without high financial investments

Most fans, participating in the survey or focus group miss the live atmosphere of traditional live events and spending time with friends and fans during an event. Many of the past digital live online events have been consumed by customers watching alone or in very small groups, creating negative emotions. Booking companies and bands could offer group event tickets allowing fans to organize home events with other fans and friends. As a result, fans could become excited about a digital event and schedule a concert event at home with others to create more emotions and a live or party feeling. Bands or booking companies could connect deeper with the group events by showing videos snippets or photos of the fan groups watching from home, while the band is performing. This could be a delighter to many fans and could create social media and online marketing opportunities for bands and booking companies. One benefit would be that bands and booking companies would be able to sell more exclusive merchandise items to groups of fans watch the digital live event or after the event has finished.

Another delighter for fans could be if the band sells merchandise directly to fans at home after the live event, while communicating directly to fans and signing merchandise. Customers will be more interested in purchasing exclusive merchandise items if the band is directly involved in the process. The event could be called: "Meet us for a beer at the merch booth!". Bands and booking companies could enhance the customer service perceived by fans and create additional exciting moments for customers if a stream, films the bands backstage or while the band is conducting a soundcheck. All these activities bring fans closer to a band and create lasting customer emotions and memories of the event.

The final customer delighter and unique selling proposition for a band or booking company could be, to add multifunctional chat functions to fan to fan and band to fan communication channels, during a digital online live event. As described earlier, regular chat functions are considered by most customers a basic quality for a digital live event. The digital online concert could have a host, perhaps a surprise guest, who can moderate the live event, announcing the songs and support the event by providing information about the band, songs being played or its lyrics. The moderator could help by answering fan questions or could communicate directly to the various online groups who have joined the live event. A multifunctional live chat would bring fans closer to the band, increase communication and creates lasting positive emotions and excitement to fans.

Summary of customer delighter and unique selling propositions:

- Creating a unique digital event experience for fan groups and friends
- Videos of group and friends' events added to the band's live performance
- Band sells and streams from the band merch-booth – "Meet us for a beer!"
- Behind the scenes and backstage band communication with fans
- Interactive multifunctional communication channels during a digital live stream, that include:
 - Moderations of the digital event through a host or moderator
 - Surprise guest chat appearance
 - Band lyrics, biography, background information history added

12.3 Booking company and band recommendations

Both, the customer survey and focus group research, of fans that have visited at least one digital online rock or heavy metal event in the last 12 month have identified that the customer perception of the current services provided by booking companies and fans has been mostly dissatisfying. It can be assumed, that the demand for digital online events will vanish completely if booking companies are unable to resolve dissatisfying basic quality service problems. Most customers, simply demand to receive all relevant technical and hardware requirements ahead of time; allowing fans to participate fully in future digital live events. Uncertainties and customer negative technical expectations, increase the chance that customers will discontinue using the service provided or current non-user will find the obstacles to join too difficult to use the service in the first place.

Booking companies and bands are also required to invest more enthusiasm and talent in the actual digital online performance, once the decision has been made to provide the service to customers. Bands must practise for digital live events and digital live events should never be pre-recorded. Digital live events should start at the scheduled time and do not leave fans waiting for the show to start. Adhering to these basics is an obvious indicator of a band's professionalism towards their own work and their fan appreciation.

Through the research of the master thesis, it has been indicated, that many live events have digital streaming set-ups available, for band playing a live show, hybrid, or complete digital event. Providing customers with the best sound technical standard possible while offering various camera angles is a basic quality service that should always be fulfilled.

Ticket prices for digital online events should ideally be for free or at least at a very low-ticket price. "Pay as you like" ticket price options are a good alternative as well. The customer research has proven, that a booking company and band can offset the lack of ticket revenues by offering customized band merchandise.

A digital live event should always provide channels of communication, in form of chat functions, for fan to fan, but also fan to band, direct interaction. These services are currently misunderstood as high-level service provided by such events; they are however basic customer quality requirements. Without these services, customers will be completely dissatisfied.

In both the customer survey and customer focus group workshop, the biggest concern to customers is that they miss the feelings involved when attending a traditional live concert. Celebrating the songs of a band, the smell of a live venue, and most importantly enjoying the music collectively with other fans and friends. No booking company currently offers group tickets for fans or friends. These group tickets would allow fans to organize digital live events for rock and heavy metal events from home and would significantly improve the quality of the events and positive customer emotions experienced. As a step further the band or booking company, could fade in images of these group events to the actual streaming event, thereby deepening the connection between the band, the actual event and the fans involved.

The research findings, strongly indicate, that customer satisfaction can be increased by providing digital online rock or heavy metal events that focus on a speciality event. Allowing customers to vote on the band's song track list, a best of event or an album release show, present themselves as fantastic

opportunities. Appreciating fan loyalty and dedication, thereby creating opportunities for booking companies and bands, to generate repeated business, can be accomplished by providing frequent buyer discounts for future digital online events.

The customer survey and focus group workshop also identified that there is a strong correlation between increased customer satisfaction and the selection of customized band merchandise a band or booking company is providing for these events. Customized merchandise creates the key source of income for a live event, but also fulfills the intangible customer need of being part of a special event and purchasing memories and positive emotions and participation, for such events.

Inexpensive game changers for booking companies and bands can be accomplished by providing 360-degree customer communication and band interaction services for digital online event. A digital rock or heavy metal online event can provide services that no traditional live event can provide.

Taking customers on a journey, that starts when a band is arriving at the backstage area of the venue, the set-up of the instruments and sound-check of the show are opportunities to have customers take part of the bands touring life, before the actual show event begins. Providing a special guest, a host or moderator of a live event will immediately connect fans with the digital live event. Booking companies can achieve a competitive edge when a live event is not just the band's performance but also when fans can access information and content of the band simultaneously. It is strongly recommended, to the band history, interesting band facts, song lyrics, all while the moderator communicates with the fans directly. After show events, that provide direct band and customer interaction, will complete the multifunctional communication cycle of a digital live show.

Providing basic and performance customer services will create customer satisfaction and ensure that customers will return to digital events and booking companies and bands can rely in increased merchandise incomes. By adding the customer delighters, competitive advantages can be created, that currently are not offered by any other digital live events.

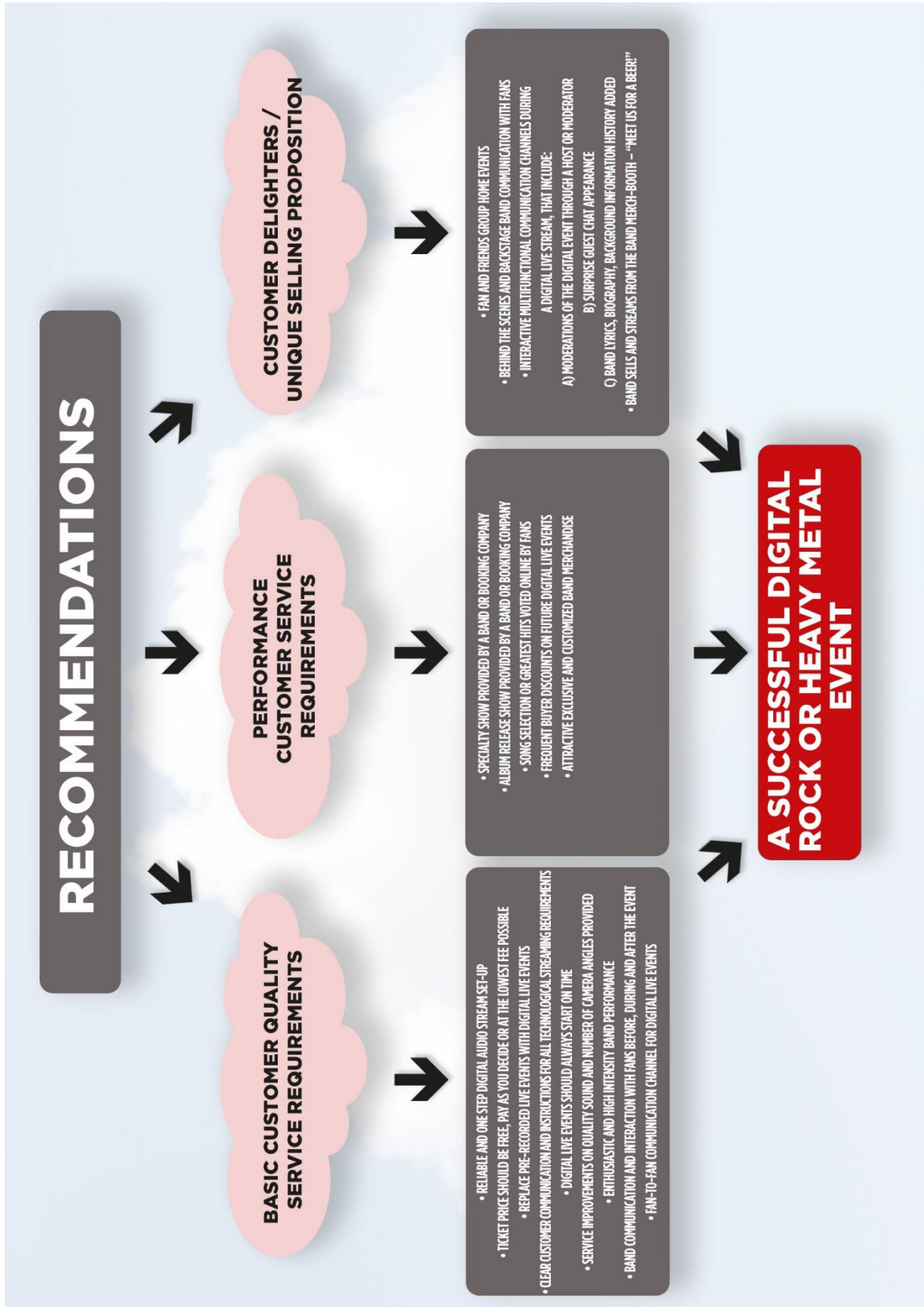


Illustration 28: Booking Company and band recommendations, own source

12.4 Digital group streaming events as an innovative enhancement

The research findings for digital streaming concerts as group events have been further discussed with Matthias Vandeven, the owner of the booking company Sound of Liberation, and Bernd Rieger the Head of Digital Marketing at Napalm Records. Both agree that offering customers the opportunity to create group events at home could create a competitive edge for booking companies and bands. Bernd Rieger suggested that a group should pay €20 for the first digital ticket purchased, followed by a small fee of €3 for each additional ticket purchased. Bands and booking companies would be able to generate more revenue, while fans would be attracted, the idea of organizing an inexpensive event at home. Both suggested that groups with the largest number of attendees could qualify for a raffle, whereby the winning fan groups could win a meet and greet with a band, backstage, an hour before the live event starts. Matthias believes this strategy would create added customer excitement and fan loyalty, while at the same time it would bring customers much closer to the band. An additional incentive, for fan groups to sign up for digital live events, could be, if the band would give away, highly personalized band goodies or rarities as the grand prize. The band would be able to have the winning group join the digital live event via video stream to receive the prizes. Digital group events could become a reality for upcoming album release shows particular in Germany and Austria to attract customer groups in North America, South America, and Australia.

13 CONCLUSION

This research aimed to identify the technological and overall opportunities available for booking companies or bands in Europe that would typically attract a live audience of 100 to 1000 fans per event. Since the beginning of the COVID-19 pandemic and the closing of live venues throughout Europe, some bands have started to look for alternative business opportunities to substitute for the lack of live events. The thesis identified that under normal circumstances the live music segment as part of the overall music industry, has been a business success. It was able to intercept declining revenue streams, particular the sales of physical sound carriers. However, it was also pointed out, that many bands underperformed economically, before the COVID-10 pandemic started; particularly in the business years 2018 -2020. Some of the challenges include renting expensive venues that could not match the number of paying customers attending the event, uncoordinated ticket pricing, and a lack of understanding on who the actual customer is.

Some alternative business concepts have been applied by the live music industry including hologram-, virtual- an augmented reality live event. These have proven to create mostly customer dissatisfaction particularly since the technology is still at a very early stage of development. These technological innovations for bands and booking companies, best described as medium size businesses, in the rock or heavy metal live business segment, have proven to be financially unserviceable. Highly creative innovations for virtual worlds like the metaverse driven by Facebook or similar concept by Epic Games will be unreachable for the entire rock and heavy metal industry for the next couple.

Digital online streaming or hybrid live events are not an innovation but have been recognized in the research as the best business concept for medium size booking companies, not only during the COVID-19 pandemic but also in the future once the crisis has ended. Many customers have experimented with digital online live events in the past, but the music business has, in all reality, failed to ask customers what requirements and desires are demanded and sought after. The findings summarized in the customer survey and focus group workshop have identified the basic customer needs that would increase the opportunity for fans to use the service again, even if the first customer service experiences have been perceived dissatisfying. By applying the discovered basic customer needs, new customers could be pleased and, in the future, maintained as customers that provide repeated business.

By analysing the customer survey and focus group workshop, the findings provide very realistic customer service drivers that, in the future, can increase customer satisfaction; at the same time these drivers will allow a band or booking company to increase revenue streams during a digital live event. Multifunctional communication and moderating services provided during a digital live event, particularly for specialty and album release shows are realistic recommendations to a band or booking companies to create customer delighters and competitive advantages for a live event. Emotional customer feelings are currently neglected by the lack of actual live events and could be reasonably supplemented by converting digital live events to fan and friends group events that are actively included during the band's performance.

Having worked in the music business for over a decade, all recommendations are realistic tools, that can be applied by all medium size bands and booking companies quickly, without overwhelming financial investments or the need for excessive manpower.

One regrettable limitation of the master thesis is that the customer survey was unable to gather more information on customer behaviour, customer needs and what drives satisfaction, of customers aged 20 or younger. It would have been interesting to analyse if the reach findings would have differed. The lack of younger research participants does not come fully as a surprise since the entire rock and heavy metal industry struggles with an aging customer segment, when compared to the musical genres of pop, techno, or rap.

13.1 Outlook

The recommendations provided in this research could be applied to most digital online streaming events, but traditionally the live music industry has been slow to adopt in a changing business world. It can be assumed, that the booking industry will return to its traditional business concept in 2022 or 2023, unaware that this will create extreme competition and bottlenecks for bands willing to tour live again. The industry will also face the challenge, that many customers have some level of social anxiety due to the COVID-19 pandemic. The question is how many years it will take for customers to visit a live event again, care-free. There is some fear, that particularly in an already aging customer segment, some customers are lost forever.

Booking companies and bands today, ignore the challenge of an aging customer segment altogether, particularly since there still a reliable sales driver for physical album sales and other customized merchandise items. The industry turns a blind eye on all concerns of who the actual customer could be in the future. Bands like Metallica, Iron Maiden and Judas Priest will most likely retire and disappear from all live activities. Which must see bands will take their place as live rock and heavy metal powerhouses?

LIST OF LITERATURE

Printed Literature

- Bennett, Rebecca Jane, Cresswell Jones, Angela (2015): *The Digital Evolution of Live Music*, First Edition, Elsevier Ltd., Kidlington
- Darwin, Charles (1859): *On the Origin of Species by Means of Natural Selection, Or, the Preservation of Favoured Races in the Struggle for Life*, J. Murray, London
- Freeman, Jason (2010): *Web-based collaboration, live musical performance and open-form scores*, International Journal of Performance Arts and Digital Media, 6:2, pp.149-170.
- Goffin, Keith, Lemke, Fred, Koners, Ursula (2011): *Hidden Needs*, First Edition, Schäffer-Poeschel Verlag, Stuttgart
- Grote, Sven, Goyk Rüdiger (2018): *Führungsinstrumente aus dem Silicon Valley – Konzepte und Kompetenzen*, Springer-Verlag Gmbh Deutschland, Berlin
- Henning, Monique, M. (2014): *Focus Group Discussions*, First Edition, Oxford University Press, New York City
- Hepworth-Sawyer, Russ (2021): *Innovation in Music: Future Opportunities (Perspectives on Music Production)*, First Edition, Routledge Publishing, Abingdon, Oxon
- Herstand, Ari (2019): *How to Make It in the New Music Business: Practical Tips on Building a Loyal Following and Making a Living As a Musician*, Second Edition, Liveright Publishing Corporation, New York City
- Herzberg, Frederick, Mausner, Bernard, Snyderman, Barbara: (1959): *The Motivation to Work* (2nd ed.). John Wiley Publishing, New York
- Kruse Brandão, Tanja, Wolfram, Gerd (2018): *Digital Connection*, Springer Fachmedien, Wiesbaden
- Kano, N., Saraku, N., Takahashi, F. and Tsuji, S., "Attractive Quality and Must-be Quality." In Hromi, J. D. (ed.) *The Best on Quality*, Vol. 7, Ch. 10, Milwaukee: ASQC, 1996, pp. 165–186.
- Krueger, Richard, A., Casey, Mary Anne (2015): *Focus Groups*, Fifth Edition, Sage Publishing Inc., Thousand Oaks, California
- Lercher, Hans (2019): *Big Picture Das Grazer Innovationsmodell*, Second Edition, DI Dr. Hans Lercher, Graz
- Mazierska, Ewa, Gillon, Les, Rigg, Tony (2020): *The Future Of Live Music*, First Edition, Bloomsbury Publishing Inc. New York City
- Mayring, Philipp (2015): *Qualitative Inhaltsanalyse: Grundlagen und Techniken*, 12. Edition, Beltz Verlag, Weinheim and Basel
- Nordgård, Daniel (2018): *The Music Business and Digital Impacts: Innovations and Disruptions in the Music Industries*, First Edition, Springer Nature Switzerland AG, Cham

- Osterwalder, Alex., Pigneur, Yves., Bernarda, Greg., Clark, Tim (2010): *Business Model Generation: A Handbook For Visionaries', Game Changers and Challengers*, Strategyzer, Hoboken, New Jersey
- Osterwalder, Alex., Pigneur, Yves., Bernarda, Greg., Smith, Alan (2014): *Value Proposition Design: How to Create Products and Services Customers Want*, John Wiley & Sons, Inc., Hoboken, New Jersey
- Passman, Donald, S (2019): *All You Need to Know About the Music Business*, 10th Edition, Simon & Schuster, London
- Stein, Tom (2021): *The Business of Music Management – How to survive and Thrive in Today's Music Industry*, First Edition, Business Expert Press, LLC, New York
- Stickdorn, Marc, Schneider, Jakob (2010): *This Is Service Design Thinking*, BIS Publishers, Amsterdam
- Vaha, Dietmar, Brem, Alexander (2015): *Innovationsmanagement: Von der Idee zur erfolgreichen Vermarktung*, Schäffer-Poeschel Verlag, Stuttgart
- Wiebe, David, A (2018): *The Essential Guide to Music Entrepreneurship: 2018 Edition*, CreateSpace Independent Publishing Platform, North Charleston
- Wunker, Stephen M., Wattman, Jessica, Farber, David R. (2017): *Jobs To Be Done: a roadmap for a customer-cantered innovation*, Stephen Wunker, New York City

Internet Resources

- Asq Org, (2021): <https://asq.org/quality-resources/nine-windows> [Accessed: 05.10.2021]
- B2binternational, (2021):<https://www.b2binternational.com/research/methods/faq/what-is-the-value-proposition-canvas> [Accessed: 10.10.2021]
- Backstage Pro, (2020): <https://www.backstagepro.at/thema/streaming-und-virtuelle-konzerte-nur-lueckenfueller-oder-echte-chance-2020-03-24-HVrbghWkCy> [Accessed: 12.09.2021]
- Berliner Zeitung, (2021): <https://www.berliner-zeitung.de/news/globales-abba-event-hologramm-show-und-neue-musik-erwartet-li.180373> [Accessed: 15.09.2021]
- Blabbermouth, (2021): <https://archive.blabbermouth.net/news/nightwishes-first-virtual-concert-draws-150000-viewers/> [Accessed: 04.09.2021]
- Blabbermouth, (2021): <https://www.blabbermouth.net/news/wendy-dio-explains-decision-to-put-ronnie-james-dio-hologram-on-hold/> [Accessed: 15.09.2021]
- Blabbermouth, (2021): <https://www.blabbermouth.net/news/sammy-hagar-to-play-rooftop-concert-above-the-strip-in-las-vegas/> [Accessed: 17.09.2021]
- Bravewords, (2021): <https://bravewords.com/news/nightwish-upcoming-human-ii-nature-virtual-livestream-show-rescheduled-for-may-2021> [Accessed: 04.09.2021]
- Broadcast Management, (2021): <https://www.broadcastmgmt.com/live-production/5-advantages-of-virtual-concerts/> [Accessed: 08.10.2021]

- BVMI Bundesverband Musikindustrie (2021): <https://www.musikindustrie.de/markt-bestseller/musikindustrie-in-zahlen/umsatz-2020#c1380> [Accessed: 01.09.2021]
- Colos-Saal, (2021): <https://colos-saal.de/service-info/%C3%BCber-uns.html> [Accessed: 06.09.2021]
- Digitaleneuordnung, (2021): <https://digitaleneuordnung.de/blog/value-proposition-canvas> [Accessed: 10.10.2021]
- Eventnet, (2021): <https://eventnet.de/musik-events-als-livestream-funktioniert-das/> [Accessed: 03.09.2021]
- Eventnet, (2021): <https://eventnet.de/digitalisierung-im-eiltempo-imho/> [Accessed: 03.09.2021]
- Frankfurter Allgemeine Zeitung, (2021): <https://www.faz.net/aktuell/wirtschaft/digitec/metaverse-facebook-entwickelt-virtuelle-welt-17456090.html> [Accessed: 17.09.2021]
- Icacono, Maurizio, (2021) www.continental-concerts.de [Accessed: 12.09.2021]
- Kerrang, (2019): <https://www.kerrang.com/features/the-dio-hologram-is-awful-and-it-needs-stop/> [15.09.2021]
- Knopper, S. (2014): *Why live concert streaming has yet to take off. Billboard*
<http://www.billboard.com/biz/articles/news/digital-andmobile/5915586/why-live-concert-streaming-has-yet-to-take-off> [Accessed: 31.08.2021]
- Live Nation. (2015): Live Nation 2014 Annual Report.
http://s1.q4cdn.com/788591527/files/doc_financials/2014/LYV-2014-Annual-Report.pdf [Accessed: 12.09.2021]
- Masnack, M. (2012): *The Sky Is Rising: The entertainment industry is large & growing... Not shrinking.* Techdirt <https://www.techdirt.com/articles/20120129/17272817580/sky-is-rising-entertainmentindustry-is-large-growing-not-shrinking.shtml> [Accessed: 31.08. 2021]
- Megadeth (2021): <https://megadeth.io/> [Accessed: 17.09.2021]
- Metal Archives (2021): <https://www.metal-archives.com/bands/Nightwish> [Accessed: 04.09.2021]
- Metal Hammer Germany (2020): <https://www.metal-hammer.de/doro-spielt-drive-in-konzert-im-autokino-1495225/> [Accessed: 17.09.2021]
- MoreCore (2021): <https://www.morecore.de/live/live-bei-an-evening-with-nightwish-in-a-virtual-world-28-05-2021/> [Accessed: 04.09.2021]
- Morris, J. W. (2014): Artists as entrepreneurs, fans as workers. *Popular Music and Society*, 37(3), pp. 273–290
- Moreandigital.ino (2021): <https://morethandigital.info/en/7-reasons-why-hybrid-events-will-be-the-future/> [Accessed: 08.10.2021]
- Mulligan, M. (2010): *Music industry meltdown: Recasting the mold.* Forrester Research blogs.
http://blogs.forrester.com/consumer_product_strategy/2010/01/music-industry-meltdownrecasting-the-mold.html [Accessed: 31.08.2021]

Napalm Records Handels GmbH (2021): <https://www.napalmrecords.com> [Accessed: 10.09.2021]

Performance Research (2021): <http://performanceresearch.com/covid-19-is-ratcheting-up-consumer-anxiety-about-future-events-but-there-are-silver-linings-for-the-sports-and-entertainment-industry/> [Accessed: 04.09.2021]

Pfanner, E. (2013): *Music industry sales rise, and digital revenue gets the credit. The New York Times.* <http://www.nytimes.com/2013/02/27/technology/music-industry-records-first-revenue-increase-since-1999.html> [Accessed: 31.08.2021]

Researchgate (2013):

https://www.researchgate.net/publication/263248287_Identifying_the_impact_of_incremental_innovations_on_customer_satisfaction_using_a_fusion_method_between_importance-performance_analysis_and_Kano_model [Accessed: 22.09.2021]

Resnikoff, P. (2014): <https://www.digitalmusicnews.com/2014/05/20/streaming-ate-recorded-music/> [Accessed: 31.08.2021]

Show4Me. (2021): https://show4me.com/blog/what_is_a_hybrid_concert_1601549453 [Accessed: 04.09.2021]

Sportsclinetampico (2021): *How do Holograms work on stage.*

<https://sportsclinetampico.com/design/how-do-holograms-work-on-stage> [Accessed: 15.09.2021]

Statista (2021): <https://de.statista.com/statistik/daten/studie/939593/umfrage/umsaetze-im-markt-fuer-livemusik-in-deutschland/> [Accessed: 01.09.2021]

Stormbringer (2021): <https://www.stormbringer.at/stories/896/an-evening-with-nightwish-in-a-virtual-world.html> [Accessed: 11.09.2021]

Techcrunch (2016): <https://techcrunch.com/2016/05/23/facebook-just-bought-vr-audio-company-two-big-ears-and-is-making-their-tech-free-to-developers/> [Accessed: 17.09.2021]

Yanev, Victor (2019): *Live Streaming Statistic – The Story of a Booming Industry*, Tech Jury: <https://techjury.net/stats-about/live-streaming> [Accessed: 12.09.2021]

LIST OF ILLUSTRATIONS

Illustration 1: "Reference Framework", Own Illustration.....	5
Illustration 2: "This is how streaming ate recorded music" (Resnikoff 2014), Online source [31.08.2021].....	8
Illustration 3: https://www.musikindustrie.de/publikationen/digital-music-report Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated).....	14
Illustration 4: https://www.musikindustrie.de/publikationen/digital-music-report Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated).....	16
Illustration 5: https://napalmrecords.com/deutsch/godisanastronaut , Online source [04.09.2021].....	25
Illustration 6: https://godisanastronaut.com/ God Is An Astronaut European Touring 2019, Source Band.....	26
Illustration 7: "Live events gatherings after Corona", source Performance Research.....	31
Illustration 8: Events split by category and indoor / outdoor, source Performance Research.....	32
Illustration 9: "Change of concerns during live events", source Performance Research.....	33
Illustration 10: https://www.metal.de/konzertberichte/nightwish-an-evening-with-nightwish-in-a-virtual-world-421990/ , Online source [04.09.2021].....	34
Illustration 11: https://www.metal.de/konzertberichte/nightwish-an-evening-with-nightwish-in-a-virtual-world-421990/ , Online source [04.09.2021].....	35
Illustration 12: Wolfheart Band Photo, Online source Napalm Records Handels GmbH [10.09.2021].....	36
Illustration 13: Digital Streaming Income by geographical location, source: Saukkonen, Tuomas (2021), tuomas.saukkonen@gmail.com	37
Illustration 14: https://www.revolvermag.com/culture/secrets-behind-ronnie-james-dio-hologram-motion-capture-peppers-ghost [15.09.2021].....	45
Illustration 15: https://www.rockhard.de/artikel/mastodon-captured-live-at-georgia-aquarium_550933.html , Online source [17.09.2021].....	46
Illustration 16: Plan of Action for a Band or Booking company, own source.....	57
Illustration 17: "Innovation Marketing" (Dr. Ronald Tingle 2020) Campus02 Innovation Management Lecture [13.11.2020].....	61
Illustration 18: "Innovation Marketing" (Dr. Ronald Tingle 2020) Campus02 Innovation Management Lecture [13.11.2020].....	61
Illustration 19: https://www.researchgate.net/figure/Kano-Model-of-Attractive-and-Must-be-Attributes	

Conclusion

_fig1_263248287 [22.09.2021].....62

Illustration 20: The 9 Windows Operator, source: asq.org.com, slightly changed and own illustration.....67

Illustration 21: Customer Survey Viewing Preferences, own source.....75

Illustration 22: Customer Survey Viewing Preferences, own source.....75

Illustration 23: Findings Focus Group 9 Windows Operator, slightly changes and own illustration.....98

Illustration 24: Customer Survey Persona 1, own source.....102

Illustration 25: Customer Survey Persona 2, own source.....103

Illustration 26: Focus Group Persona 1, own source.....104

Illustration 27: Focus Group Persona 2, own source.....105

Illustration 28: Booking company and band recommendations, own illustration.....111

...

LIST OF TABLES

Table 1: https://www.musikindustrie.de/publikationen/digital-music-report Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated..	14
Table 2: https://www.musikindustrie.de/publikationen/digital-music-report Sales Development Digital Music Sales Germany, source: Bundesverband Musikindustrie (2021), online (slightly changed and translated...	16
Table 3: Band Example 1: European Tour Routing and Ticket Sales 2019 - private source, adjusted.....	23
Table 4: Band Example 1: European Tour Distance Travelled.....	24
Table 5: Tour Routing God Is An Astronaut 2019, Source Band.....	27
Table 6: Customer Journey Map for a digital streaming live event, source: Own Illustration.....	64
Table 7: Customer Live Concerts after the COVID-19 pandemic is over, own source.....	76
Table 8: Reasons customers would prefer using a digital live event instead of a traditional live event, own source.....	78
Table 9: The most important customer services during a live digital stream, own source.....	80
Table 10: Dissatisfaction during a live digital stream, own source.....	81
Table 11: Unanswered customer service requirements, own source.....	82
Table 12: Customer Focus Group Workshop Timetable.....	86
Table 13: Customer Focus Group Workshop “Customer Journey”, own source.....	93

APPENDIX 1 CUSTOMER SURVEY

Customer Survey for fans with customer experience in online digital streaming events:

Onlinestreaming von Live Rock und Heavy Metal Konzerten

Teilnahmeberechtigung für den Fragebogen:

Teilnehmer*in hat in den letzten 12 Monaten mindestens an einem Online-Konzert teilgenommen.

In der folgenden Umfrage geht es um das Thema **Online-Streaming von Live-Konzerten**. Im Rahmen meiner Abschlussarbeit beschäftige ich mich mit folgenden Forschungsfragen:

- Sind Online-Konzerte eine Alternative oder Ergänzung zu traditionellen Konzertveranstaltungen während der Corona-Pandemie und der Zeit danach?
- Was sind die bisherigen Erfahrungen der Kunden?
- Wie häufig werden Konzert-Streams genutzt?
- Was sind die wichtigsten Bedürfnisse von Kunden?

WICHTIG: Bei vorgegebenen Antworten, bitte hinter dem vorgegeben Kästchen klicken, um die für dich richtige Antwort einzutragen. Bei beantworteter Frage erscheint ein Haken.

Bitte den ausgefüllten Fragebogen an meine E-Mail-Adresse: sebastian.muench@napalmrecords.com oder falls die Teilnahme über Facebook erfolgt, als Nachricht über mein Facebook Account verschicken.

Name: *(Name Angabe ist freiwillig)*

Datum:

Alter:

Geschlecht:

1. Allgemeine Online-Konzert-Streaming Fragen

Frage 1:

Hast du in den letzten 12 Monaten an einem Online Streaming Konzert als Zuschauer teilgenommen?

Ja

Nein

Frage 2:

An wie vielen Online-Konzerten hast du in den letzten 12 Monaten teilgenommen?

Anzahl:

Frage 3:

Wie viele der obengenannten Online-Konzerte waren kostenpflichtig?

Anzahl:

Frage 4:

Was war der höchste Ticketpreis, den du bezahlen musstest für das Online-Ticket? – Ohne beinhaltete Merchandise-Bundles-Optionen mit Ticketpreis

Betrag:

Frage 5:

Was war der niedrigste Ticketpreis, welchen du bezahlen musstest für das Online -Ticket? – Ohne beinhaltete Merchandise-Bundles-Optionen mit Ticketpreis

Betrag:

Frage 6:

Wie viele der in Frage 1 beantworteten Online-Konzerte waren gratis?

Anzahl:

2. Teilnehmer von Online-Live-Konzerten

Frage 7:

Ich streame Online-Konzerte allein

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 8:

Ich streame Online-Konzerte gemeinsam mit..

- 2 – 3 Freunden
 3 – 5 Freunden
 mehr als 5 Freunden

3. Online-Live-Konzerte Nutzen nach der Corona-Pandemie

Frage 9:

Ich würde Online-Konzerte- Streaming nur während der Corona-Pandemie nutzen

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 10:

Ich würde Online-Konzerte in der Zukunft nutzen, um Zeit zu sparen

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 11:

Ich würde Online-Konzerte in der Zukunft nutzen, um an Album Release Shows im Ausland online teilzunehmen

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 12:

Ich würde Online-Konzerte in der Zukunft nutzen, um an Album Release Shows in Österreich online teilzunehmen

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 13:

Ich würde Online Konzerte in der Zukunft nutzen, um meine Freizeit flexibler planen zu können

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 14:

Ich würde Online Konzerte in der Zukunft nutzen um CO2 zu sparen bei der sonst üblichen Anreise

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 15:

Ich würde Online-Konzerte in der Zukunft besuchen, wenn der eigentliche Veranstaltungsort zu weit weg ist von meinem Zuhause.

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

Frage 16:

Ich würde Online-Konzerte in der Zukunft nutzen, um Geld zu sparen, wenn diese günstiger sind, wie das Konzert-Tickets des eigentlichen Events

- Stimme voll und ganz zu Stimme eher zu Teils, teils Stimme eher nicht zu Stimme gar nicht zu

4. Online-Live-Konzerte Service Fragen

Frage 17:

Mir ist wichtig das der Online-Stream dauerhaft verfügbar ist – auch nach dem eigentlichen Event

- Stimme voll und ganz zu
 Stimme eher zu
 Teils, teils
 Stimme eher nicht zu
 Stimme gar nicht zu

Frage 18:

Was wären für dich Gründe ein Online Konzert, dem eines traditionellen Konzert vorzuziehen?

<i>Gründe:</i>	<i>Rangordnung (1-5):</i>
1	
2	
3	
4	
5	

Ordne die, von dir gewählten Gründe in absteigender Wichtigkeit, indem du ihnen eine Zahl von 1-5 zuteilst. 1 ist hierbei die wichtigste und 5 die unwichtigste. 5 Angebote und Wünsch sind hier die maximale Antwort möglich. Es können aber auch weniger Angebote und Wünsche aufgelistet werden.

Frage 19:

Mir ist wichtig, dass der Online-Stream über eine Chat-Funktion verfügt

- Stimme voll und ganz zu
 Stimme eher zu
 Teils, teils
 Stimme eher nicht zu
 Stimme gar nicht zu

Frage 20:

Exklusive Merchandise Kauf-Optionen für digitale online Konzerte sind mir wichtig

- Stimme voll und ganz zu
 Stimme eher zu
 Teils, teils
 Stimme eher nicht zu
 Stimme gar nicht zu

Frage 21:

Welche Merchandise Bundles sind dir wichtig bei Kauf eines digitalen Online-Tickets?

<i>Merchandise:</i>	<i>Rangordnung (1-5):</i>
Exklusives Shirt	
Autogrammkarte	
CD des Live-Events	
Band Patch	
Bandfahne	

Ordne die Merchandise Produkte in absteigender Wichtigkeit, indem du ihnen eine Zahl von 1-5 zuteilst. 1 ist hierbei die wichtigste und 5 die unwichtigste.

Frage 22:

Mir ist wichtig, dass sich Bands nach dem Konzert Zeit nehmen Online-Fragen der Onlinefans zu beantworten.

Stimme voll und ganz zu
 Stimme eher zu
 Teils, teils
 Stimme eher nicht zu
 Stimme gar nicht zu

Frage 23:

Welche 5 Service Leistungen sind dir während des Online-Konzert-Streams am wichtigsten?

<i>Service Leistungen:</i>	<i>Rangordnung (1-5):</i>
1	
2	
3	
4	
5	

Appendix 1 Customer Survey

Ordne die, von dir gewählten Service Leistungen in absteigender Wichtigkeit, indem du ihnen eine Zahl von 1-5 zuteilst. 1 ist hierbei die wichtigste und 5 die unwichtigste. 5 Service Leistungen sind hier die maximale Antwort möglich. Es können aber auch weniger Leistungen aufgelistet werden.

Frage 24:

Welche 5 negativen Erfahrungen hast du in den letzten 12 Monaten bei Online-Streaming Konzerten gemacht?

<i>Negative Erfahrungen:</i>	<i>Rangordnung (1-5):</i>
1	
2	
3	
4	
5	

Ordne die, von dir gewählten negativen Erfahrungen in absteigender Wichtigkeit, indem du ihnen eine Zahl von 1-5 zuteilst. 1 ist hierbei die wichtigste und 5 die unwichtigste. 5 negative Erfahrungen sind hier die maximale Antwort möglich. Es können aber auch weniger Erfahrungen aufgelistet werden.

Frage 25:

Welche 3 Service Angebote von Bands und Booking-Firmen würden dich begeistern und wurden bisher jedoch noch nicht angeboten, wenn du ein Online-Konzert gestreamt hast?

<i>Angebote und offene Wünsche:</i>	<i>Rangordnung (1-3):</i>
1	
2	
3	

Ordne die, von dir gewählten Angebote und Wünsche in absteigender Wichtigkeit, indem du ihnen eine Zahl von 1-3 zuteilst. 1 ist hierbei die wichtigste und 3 die unwichtigste. 3 Angebote und Wünsche sind hier die maximale Antwort möglich. Es können aber auch weniger Angebote und Wünsche aufgelistet werden.

Vielen Dank für Deine Teilnahme!

APPENDIX 2 CUSTOMER FOCUS GROUP WORKSHOP

Attendees 8
Date: 29. October 2021

Topic	Content
Introduction & Ice Breaker	<p>Hello, thank you for taking the time for today's workshop. As you probably know, I am studying innovation at the FH Campus02 in Graz, Austria. For the completion of my master thesis, I am researching innovative concepts that could change how we conduct live concerts in the future.</p> <p>Please introduce yourself, state your age and give me an estimate on your attendance of concerts in a year before the Corona crisis. What was the longest distance you traveled for a live concert?</p> <p><i>(Small talk questions to loosen up: How are you doing these days? etc.)</i></p>

General set-up of the interview 10 minutes	<p>Due to the current COVID-19 challenges visiting concerts has been a challenge for many fans. Many bands have offered digital online concerts and hybrid live events for the lack of touring opportunities. In today's interview we will discuss and research your expectations on digital streaming and hybrid events. We will discuss the services offered and what would interest you in a digital live event? Why you haven't used the service yet, what are your current obstacles? Would you consider using an online live event? What services would need to be provide?</p> <p>We will also brainstorm possible innovation or creative ideas that you would consider an advantage or excitement factor in using this service-</p> <p>There are no right and wrong answers - we are interested in your personal views, creative ideas, and experience with the today's topic. The purpose of the workshop is not to change your mind about online-digital streaming events but to better understand your feelings, thoughts, and activities you enjoy.</p> <p>The conversation will take about 2 hours of your time and will be recorded. We hope this is okay with you. I would need these recordings as a tool for our evaluation.</p> <p>First, I would like to thank you for taking the time for this workshop. If there are any questions during the workshop, please feel free to ask them or do you have any questions before we start?</p>
--	--

Brainstorming 15 Minuten	<ul style="list-style-type: none"> What do you know about online digital concerts and why they have been offered? How do you hear about them? Tell me briefly why you have not yet used this service? What has been your biggest concern? 																																			
Introduction & Purpose Customer Journey 5 Minutes	<p style="text-align: center;">Digital Streaming of a live event Customer Journey Map</p> <table border="1"> <thead> <tr> <th>Journey Phase</th> <th>Pre-Event Phase Awareness</th> <th>Pre-Order Phase Consideration</th> <th>Day of the event Decision</th> <th>Post Event Phase Delight</th> </tr> </thead> <tbody> <tr> <td>Jobs To Be Done</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Channels / Touch-points</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Desires & Expectations</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Challenges /Uncertainties</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Experience / Emotions</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Opportunities</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Explanation of the idea behind a customer journey – 5 Minutes</p>	Journey Phase	Pre-Event Phase Awareness	Pre-Order Phase Consideration	Day of the event Decision	Post Event Phase Delight	Jobs To Be Done					Channels / Touch-points					Desires & Expectations					Challenges /Uncertainties					Experience / Emotions					Opportunities				
Journey Phase	Pre-Event Phase Awareness	Pre-Order Phase Consideration	Day of the event Decision	Post Event Phase Delight																																
Jobs To Be Done																																				
Channels / Touch-points																																				
Desires & Expectations																																				
Challenges /Uncertainties																																				
Experience / Emotions																																				
Opportunities																																				

Appendix 2 Customer Focus Group Workshop

Let's work on a customer journey for a digital live event with you as customer. The group will be divided in 2 parts:

Group A prepares the Pre-Event & Pre-Order Phase

Group B prepares the Day Of Event & Post Event Phase

Customer Journey Workshop 20 Minutes	Pre-Event Phase	Jobs- To Be Done Channels & Touch-Points Desires & Expectations Challenges & Uncertainties Experience / Emotions	Focus on <ul style="list-style-type: none"> • Focus Group staying in the correct phase of the customer journey • Registering Opportunities • How do answers differ btw. Males and Females. If at all • Ensuring everybody gets equal time to speak.
	Pre-Order Phase	Jobs- To Be Done Channels & Touch-Points Desires & Expectations Challenges & Uncertainties Experience / Emotions	Additional notes:
	Day Of Event	Jobs- To Be Done Channels & Touch-Points Desires & Expectations Challenges & Uncertainties Experience / Emotions	

	Post Event Phase	Jobs- To Be Done Channels & Touch-Points Desires & Expectations Challenges & Uncertainties Experience / Emotions	
--	------------------	--	--

Let's discuss the results together

Customer Journey combining both groups 15 Minutes	Customer Journey Summary	Combining both groups and their results One person in each group explains the findings	Focus on <ul style="list-style-type: none"> • Guide findings • Allow all group members to share ideas • Avoid one or more members to be too dominant • Reduce negative participation
	Reverse Group additional thoughts	How does each group like the other groups findings? What is missing? What is important?	Focus on <ul style="list-style-type: none"> • Guide findings • Allow all group members to share ideas • Avoid one or more members to be too dominant • How does the finding differ? • What was the biggest challenge? • New ideas?
	Findings	Summary of findings 3 Key Findings Ranking of Ideas	Focus on <ul style="list-style-type: none"> • Takeaways • Feelings of group • Level of creativity • Additional Notes

Topic	Content
9 Window Operator Introduction- 15 Minutes	<p>The purpose of the 9 Windows Operator is explained. It's purpose is to discuss and blue oceans that have not been identified in the previous Customer Journey exercise- They have been shown the actual tool and have been explained all sections of the 9 Window operator: Systems and Time Point of View. It was explained to the focus group that the 9 Window Operator will be used to analyse A Digital Streaming Event. The explanation time is 15 minutes.</p> <p>The diagram is a 3x3 grid with 'Digital Streaming Live Event' in the center. The rows represent System levels: Super-System (top), System (middle), and Sub-System (bottom). The columns represent Time Points: Past (left), Present (middle), and Future (right). Each cell contains a question:</p> <ul style="list-style-type: none"> Super-System, Past: What do our customers do before they use the service of a digital streaming event? What is happening in the customers surrounding? Super-System, Present: What does our customer do during the stream of a live event? Who is our customer and why is the digital streaming event provided? Super-System, Future: What does our customer do after they used the digital streaming service? What is happening in the customer environment after the event? System, Past: What does the service do before it is used or purchased? System, Present: Digital Streaming Live Event System, Future: What does the service do after the event? Sub-System, Past: What are the components needed before the performance? Sub-System, Present: Which components are needed during the event? How is the service provided? Sub-System, Future: What are the components doing after the event, once they achieved its need? <p>Vertical arrows on the right indicate 'ZOOM OUT' (upward) and 'ZOOM IN' (downward).</p>

Let's work on the 9 Window Operator for Digital Live Events as one Group

Topic	Aspect	Question	Control Question
9 Window Operator – 30 Minutes	Present System	What does the customer do during the digital stream?	Focus on <ul style="list-style-type: none"> Where is the customer streaming from? Technology Functions of the stream
		<ul style="list-style-type: none"> What are the technology requirements? Which services should be offered? 	Focus on <ul style="list-style-type: none"> Chat functions Interaction between band and fan Camera and sound
	Super System Present	Who is our customer? What does the customer do during the streaming event? Why is the digital streaming event provided?	Focus on <ul style="list-style-type: none"> Customer segments (new and old) Why does the customer want to stream an event? Why did the customer choose this alternative
	Sub-System Present	Which components are needed during the event? How is the service provided? Which technical set-ups are used?	Focus on <ul style="list-style-type: none"> Are there any components that will benefit the customer and create additional value? How is the digital set up to excite customers
	Sub-System Past	What are the components needed before the performance? What ticketing options create value to customer? Which merchandise bundles create value? Which promotional tools would interest customers?	Focus on <ul style="list-style-type: none"> Ticketing Merch Bundles Other creative ideas Venue when hybrid event
Sub-System Future	What are the components doing after the event once they achieved it's need? How can value created after the event?	Focus on <ul style="list-style-type: none"> Customer copy of the event Backstage at the venue Meeting at the Merchandise Booth 	

Appendix 2 Customer Focus Group Workshop

Topic	Aspect	Question	Control Question
9 Window Operator	Past- System	What is the venue, booking company and band do before the digital event?	Focus on <ul style="list-style-type: none"> • Online Information • Promotion • Band / Booking Company Offering
		What set-up should the booking company and band provide to allow for a digital streaming event that will create customer value?	Focus on <ul style="list-style-type: none"> • Booking Company Offering • Technical Set-up • Fan Communication (Band) • Fan Communication (Booking Company)
	Future System	What services can the band and booking company offer after the digital live event to their customers?	Focus on <ul style="list-style-type: none"> • Future Streaming services • Bundles after the event • Fan Communication • Meet and Greet • Merchandise • Backstage Event • After Event
	Sub-System Present	Which components are needed during the event? How is the service provided?	Focus on <ul style="list-style-type: none"> • Are there any components that will benefit the customer and create additional value? • How is the digital set up to excite customers
	Super System Past	What does our customer do before the digital live event? How do they spend their free time? How do they schedule the invent? How do they prepare for the digital live event? How do they become aware of the event and stay informed?	Focus on <ul style="list-style-type: none"> • Customer segments that are interested in the service • What drives customer behaviour? • How do customers decide on the event?

Now we have almost reached the end of our workshop...

Topic	Content
Last Question	Is there perhaps anything else on this topic that we haven't discussed that you would like to bring in?
Thank You	We have now reached the end of the focus group and I would like to thank you once again for your time, participation, and many interesting answers.

APPENDIX 3 CUSTOMER FOCUS GROUP WORKSHOP IMPRESSIONS

