



Journal of the
Music & Entertainment Industry
Educators Association

Volume 20, Number 1
(2020)

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Cancel, Postpone, or Reschedule: The Live Music Industry's Response to Ticket Refunds During the COVID-19 Pandemic

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<https://doi.org/10.25101/20.2>

Abstract

The impact COVID-19 has had on the live music industry has been well documented. An unprecedented number of events have been canceled, postponed, or rescheduled. While ticket refund policies under normal circumstances are familiar, this paper addresses how ticket refund policies were applied during the pandemic. After a discussion of the economic impact of the pandemic on the live music industry, this paper provides a chronology of significant cancellations and offers a qualitative analysis and visual representation of the 261 major music events affected by the pandemic as reported by *Billboard*.¹ The paper then extends upon the existing *Billboard* data by leveraging modern technological tools to make this data more complete and publicly available for research purposes. Following is an outline of the ticket refund policies of major promoters, independent promoters, and festival promoters and a review of some of the alternatives and incentives offered to ticket holders. The paper concludes with a summary of some of the legal and reputational ramifications faced by promoters and discusses questions for further research.

Keywords: ticketing, COVID-19, music, industry, touring, refunds, cancellations, reschedule, concerts

The Impact of COVID-19 on Live Music

The COVID-19 pandemic has led to irrevocable shifts in our daily lives, especially in regards to large event gatherings. In the wake of COVID-19, thousands of concerts and festivals have been canceled across the globe, beginning slowly in late January through early March before increasing exponentially.² As early as March 5, analysts had already predicted that the music industry could lose up to \$5 billion in live music revenue as a direct result of shutdowns due to the novel coronavirus.³ On March 11 alone, the stock price for Live Nation (LYV) fell 16.6%, for a single day valuation loss of more than \$1.8 billion⁴ and the Madison Square Garden Company (MSG) fell 9.5% the same day.⁵

On March 12, Live Nation, AEG, CAA, WME, Paradigm, and UTA released a joint statement:

The world's leading forces in live entertainment have come together to form a global task force to drive strategic support and unified direction ensuring precautionary efforts and ongoing protocol are in the best interest of artists, fans, staff, and the global community. At this time, we collectively recommend large scale events through the end of March be postponed. We continue to support that small scale events follow the guidance set by their local government officials. We feel fortunate to have the flexibility to reschedule concerts, festivals, and live events as needed, and look forward to connecting fans with all their favorite artists and live entertainment soon.⁶

With the hundreds of concerts directly impacted by the above statement, the declaration of a national emergency on March 13 only served to compound the amount of events that were affected and the live music industry came to a virtual standstill by late March 2020.⁷ On April 3, only three weeks after the officially-declared national emergency, *Pollstar* predicted that "the live industry would lose up to \$8.9 billion of revenue if the rest of 2020 were to remain dark," a far turn from the estimated \$12.2 billion that would have been collected had the shows continued as planned.⁸

By June 9, major promoter AEG had to lay off 15% of its workers, furlough another hundred, and cut pay by 20%-50% for its remaining employees. *Billboard* estimated that, at this time, "approximately 45,000 full

time employees [had been] furloughed or laid off and another 300,000-400,000 part-time and freelance employees [are] out of work this summer.”⁹ With live music being among the first industries to close and slated to be among the last to reopen, these employees may be unable to find work in the industry well into 2021.¹⁰

Many predict that independent venues may have to close their doors forever. As one survey conducted by the National Independent Venue Association (NIVA)—an organization created in April 2020 to support independent venues and to lobby for government support due to losses caused by the pandemic—reported, “90% of independent venues report they will close permanently in a few months without federal funding.”¹¹

Due to so much uncertainty surrounding the continual spread of COVID-19, there is little consensus as to whether and when concerts and tours will be able to resume. NIVA argues that until major markets—such as Seattle, Los Angeles, New York City, and St. Louis—are open, tours will not be able to be routed across the country, which will impact secondary and tertiary cities as well (Exhibit 1).

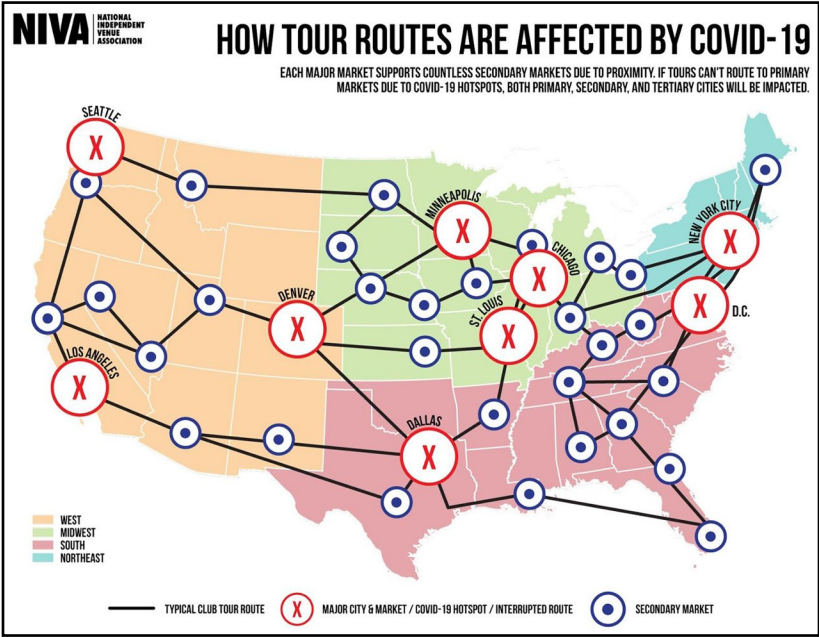


Exhibit 1. How tours are affected by COVID-19 (National Independent Venue Association).

Geoff Steele, independent promoter and Executive Director of the Gillioz Center for Arts and Entertainment in Springfield, Missouri, likens this situation to an ecosystem:

No one is coming to Springfield, they're going through Springfield. They're on their way to Kansas City or St. Louis or Tulsa or Little Rock or Wichita, which are the larger hubs that we're associated with when routing. We're really an ecosystem that's dependent on one another. The number one question that everyone is asking is, "when are we coming back?" And the answer is, that's an industry-wide, collective question because no one is going to get in a bus in Nashville and drive to Springfield when St. Louis is behind us in the reopening process or Kansas City is behind us in the reopening process...we really are living in an unprecedented season where the industry collectively had to hit pause.¹³

This collective reopening may result in countless shows needing to be refunded throughout 2020 and beyond. The erosion of this "ecosystem" has become even more significant as two major markets, New York City and Los Angeles, recently announced that it is "difficult to imagine" live events until 2021.¹⁴

Not only has the pandemic disrupted the touring ecosystem, it has also derailed the "tenuous ecosystem" of festivals. Some opined that many in the festival business may not survive.¹⁵ By late March, many large festivals had been altogether canceled, including Ultra Music Festival in Miami and South by Southwest in Austin. Others had a more optimistic viewpoint and chose to reschedule to the fall, with Coachella moving its March dates to October. *Billboard* even posed the question, "Will Fall Become the New Summer?" for the festival season at this time.¹⁶ However, the lasting impact of the virus on large events had yet to be seen and by July, most major festivals in 2020 had officially canceled. This list included Coachella and Stagecoach,¹⁷ Austin City Limits,¹⁸ Bonnaroo,¹⁹ and many others.

Now that this paper has summarized the impact COVID-19 has had on the live music and festival business, we turn our attention to what is arguably the most important customer service issue faced by every venue and promoter responding to the pandemic: ticket refunds. This begins

with a qualitative analysis and a novel visual exploration of a few hundred major music events affected by the pandemic. Next will be a review of sample ticket policies and an assessment of the ways promoters managed ticket refunds when faced with postponement, rescheduling, and cancellation. The paper will also take a look at how some refund policies were adapted in the response to the crisis and highlight some of the legal and reputational ramifications associated with these decisions.

Methods and Results

On January 24, 2020,²⁰ *Billboard* began compiling a global list of major music events affected by the COVID-19 pandemic. This list has been consistently updated in the past months and at the time of this writing, has been updated through July 1, 2020. The following section provides a qualitative analysis of the information derived from this article, including some of the first major cancellations, the dates of cancellation, the artists or festival names, the statuses of the events, the genres of the musicians, and the refund policies for the individual events.

In this paper, the authors present a novel dataset that they have created, which is free for public use. It is available online via [GitHub](#).²¹ To create the dataset, the authors developed an online web scraper which parsed text from the aforementioned *Billboard* article and used natural language processing techniques to extract relevant variables such as the event name and when it was cancelled. The authors then built a bot to automatically search Google for relevant refund information. Finally, they manually verified and edited these results as necessary. This dataset is limited in that it is not comprehensive; this by no means captures every concert that was cancelled in the era of COVID-19 (of which there are thousands). Rather, this dataset, although limited in scope, is a meaningful contribution in that it allows researchers to analyze other factors, such as refund policy, genre, and date of cancellation, with respect to specific events.

Following these initial closures outlined in Exhibit 2, cancellations and postponements began compounding rapidly. As Exhibit 3 shows, this uptick began on March 12, the day before U.S. President Donald Trump declared COVID-19 a national emergency. In the 45 days from January 24 to March 8, only 48 cancellations of major concerts were announced worldwide. In the five days following, from March 9 to March 13, 66 cancellations were announced, around 40% of which occurred on March 12.

First Major Cancellations Worldwide		
Type of Cancellation	Date	Location and Entity
First Major Worldwide Venue Closure	January 24	The Chinese government closes Mercedes Benz Arena indefinitely
First U.S. Festival Canceled, Due to Travel Concerns from Asia	February 25	Korea Times Music Festival, set to occur on April 25 in Los Angeles, is canceled
First European/U.K. Tour Cancelled	March 2	The band Wolf Parade cancels its entire tour, slated to begin on March 2 in the Netherlands
First U.S. Music Festival Canceled, Due to Coronavirus Outbreak in the U.S.	March 4	Ultra Music Festival's Miami festival scheduled for March 20-22 is canceled
First Full U.S. Tour Postponed	March 9	Pearl Jam postpones its U.S. tour scheduled to start March 18

Exhibit 2. First major cancellations worldwide.

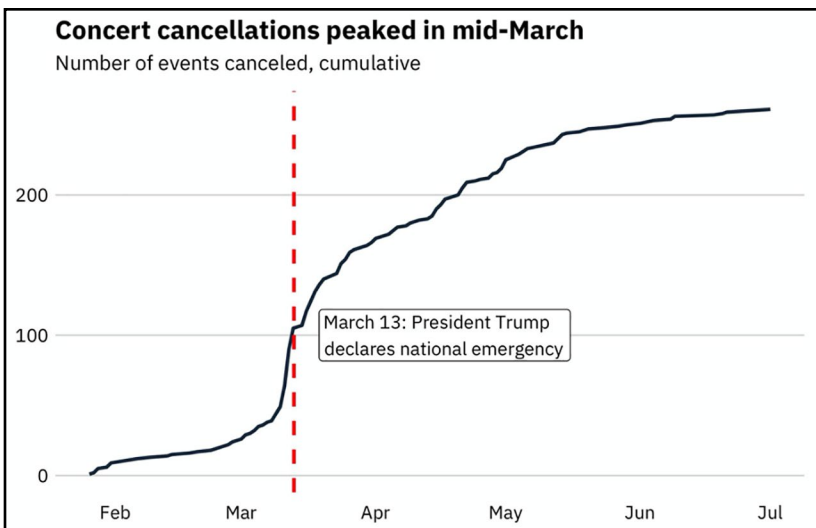


Exhibit 3. Major concert cancellations worldwide February to July 2020.

Ticket Refund Policies

Historically, the refund policy in the live music space has been more limited than some in the hospitality sector or retail sector. As Limbong has explained, the “live event economy is a complicated one, and it’s been a struggle for ticket buyers to get their money back.”²² More akin to the airline industry, ticket inventory cannot be warehoused, demand is highly cyclical, and the investment in shows can sometime be irrational.²³ However, unlike many travel-related services (e.g., airlines, car rental, hotel), that offer partial or even full refunds for customers who choose to cancel before the service is rendered, live music events are “normally resistant to refunding post-purchase cancellations” requested by the customer.²⁴ Despite this historic resistance, in the wake of COVID-19, concert refund policies have had to be exercised at a level never seen pre-pandemic.

It can be argued that fans are more conscious of ticket refund policies than ever before. One study found that in a survey of over 100,000 respondents, 80.7% said that the ability to get a full refund if the event was canceled would influence them to buy a ticket for a future event. Additionally, over 70% said they would be more likely to make a future purchase if they could exchange their tickets for another event or receive credit to be used in the future.²⁵ The following sections examine various refund policies under the status of cancellation, postponement, or reschedule. This section ends with a novel interactive visualization of various refund policies.

In the analysis of our *Billboard* cancellations dataset, the authors researched the prevalence of three types of refund approaches under the aforementioned statuses: *automatic*, *optional*, and *no refund*. As Exhibit 4 shows, the most prevalent refund strategy at the time of cancellation was an optional refund.

This relationship was mostly static over time. However, notice that concert cancellation refund strategies were more explicitly stated as the coronavirus grew in prevalence. Using March 13 as a cutoff—the day COVID-19 was declared a national emergency—we observe a marked difference in refund strategies. Of the events cancelled up until March 13 (N = 105), 29.5% did not publicize a refund approach at the time of cancellation. By contrast, of those events cancelled after March 13 (N = 156), only 14.1% of the events had an unknown refund strategy. The events in the latter category were instead more likely to offer optional refunds (51.3% of events after March 13, and 30.5% of events up until March 13). Exhibit 5 visualizes the breakdown.

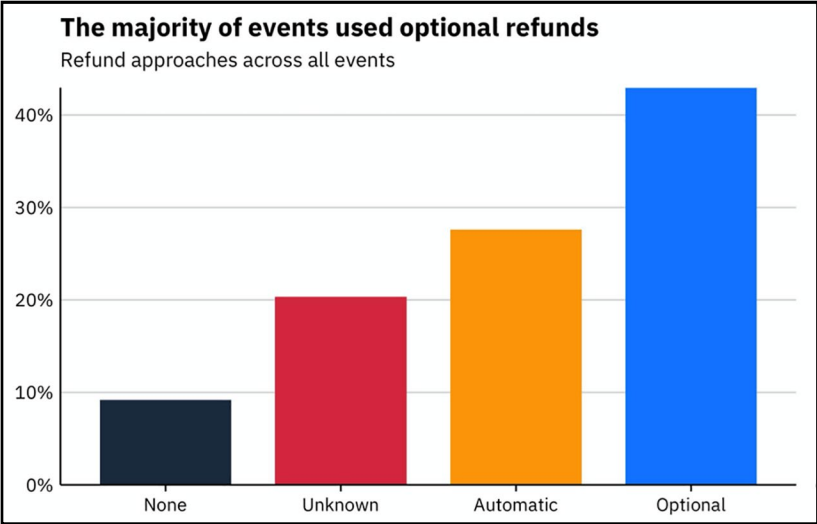


Exhibit 4. Cancellation policies for events in the *Billboard* dataset.

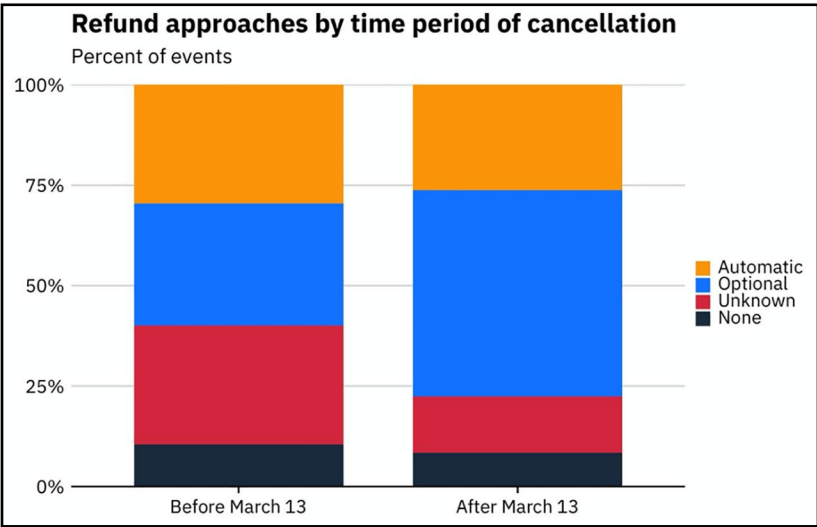


Exhibit 5. Cancellation policies for events in the *Billboard* dataset by time period of cancellation.

This relationship can also be observed with respect to other variables, such as the genre of the artist/event. Exhibit 6 presents this relationship. Here, notice that country artists were more likely than those in other genres to provide automatic refunds. However, this result is interpreted with a high degree of caution, due to the low number of country artists in the dataset ($N = 17$).

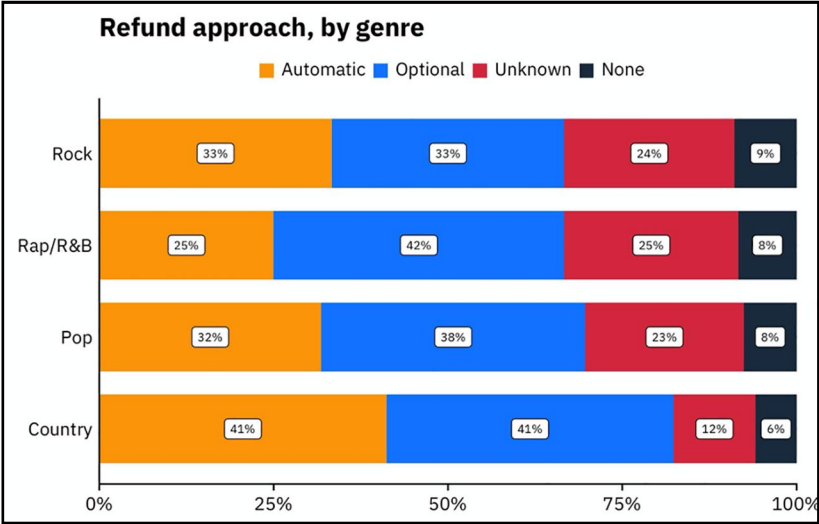


Exhibit 6. Refund approach by genre for events in the *Billboard* dataset.

In addition to our analysis of genres, we look at the *type of event*, most specifically whether the event was a single-artist concert or an entire festival, and whether this factor interacts with refund policies. Notably, it was found that individual artists ($N = 185$) were more than twice as likely as festivals ($N = 71$) to provide automatic refunds (33% vs. 15%). In contrast, festivals were more likely than individual artists to offer optional refunds (58% vs. 36%). Exhibit 7 presents this breakdown visually.

Finally, consider how events with different *cancellation statuses* (canceled, postponed, and rescheduled events) might differ in their refund policies. Here, it is logical to assume that rescheduled and postponed concerts would be less likely to provide automatic refunds, as they intend on occurring at a later date. This assumption is borne out in the data, as Exhibit 8 presents. Canceled concerts ($N = 109$) were more than twice as

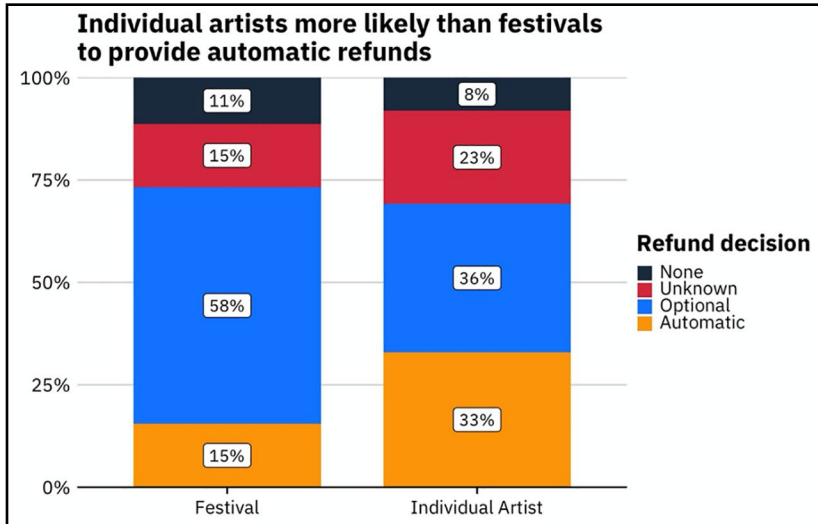


Exhibit 7. Refund approach by event type for events in the *Billboard* dataset.

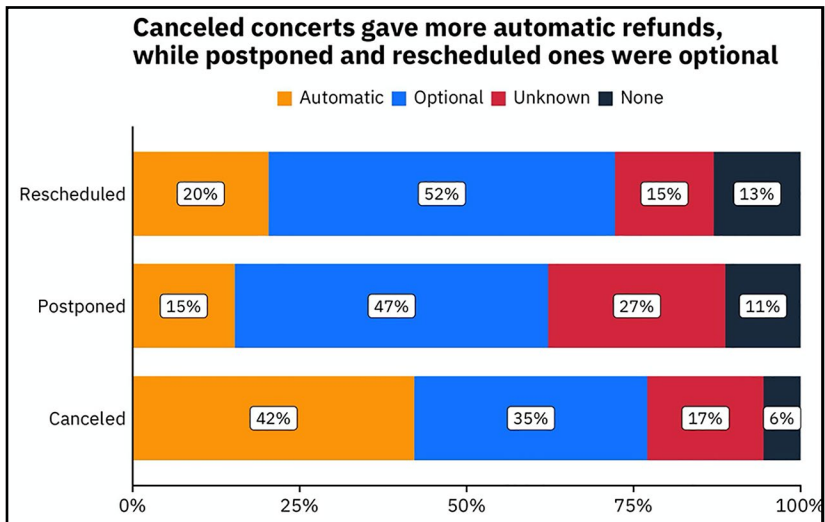


Exhibit 8. Refund approach by cancellation status for events in the *Billboard* dataset.

likely as postponed (N = 98) and rescheduled (N = 54) ones to provide automatic refunds (42% vs. 15% vs. 20%, respectively). Also of note is that roughly one in four (27%) postponed events had not provided a clear refund policy at the time of their announced postponements.

Interactive Exploration

To be fully transparent and to inspire future research, the authors have developed an *interactive data visualization* based on a dataset built from the original qualitative content reported by *Billboard*.²⁶ This allows the reader to explore the temporal trend in concert cancellations, with a focus on the refund policy of each event that was cancelled. The visualization can be found online at [GitHub](https://connorrothschild.github.io/cancelled-covid-concerts/d3/)²⁷ and it is presented in a still image below (Exhibit 9).

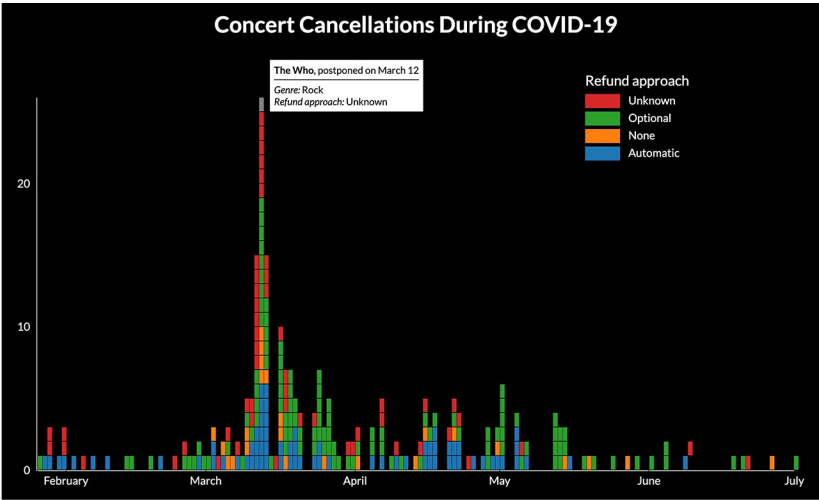


Exhibit 9. Interactive data visualization based on a dataset built from the original qualitative content reported by *Billboard*. <https://connorrothschild.github.io/cancelled-covid-concerts/d3/>.

Now that a better understanding of when live events were announced as canceled, postponed, or rescheduled, and the type of refund policy associated with each has been established, we turn our attention to a deeper assessment of refund policies of major promoters (Live Nation and AEG), independent promoters, and festival promoters.

Live Nation and AEG Refund Policies

In 2019, Live Nation was the highest selling promoter worldwide with 46.66 million tickets sold; AEG followed in second with close to 15 million tickets sold.²⁸ Together, Live Nation and AEG “control about three-quarters of the concert business based on ticket revenue” and also control two of the largest ticketing systems, Ticketmaster and AXS respectively.²⁹ During the pandemic, these two entities were responsible for deciding how to refund thousands of events hosted on their ticketing platforms. Ticketmaster stated on April 17 that “30,000 events...have already been postponed or canceled as a result of COVID-19.”³⁰

AXS’s FAQ section has always stated that, “Tickets have a ‘no refund, no exchange’ policy.”³¹ While this official statement has never changed, following the start of the pandemic it created a page dedicated directly to their ticketing response for shows affected by COVID-19. It states:

Sometimes events can’t be rescheduled. If your event is cancelled, we’ll email to let you know and automatically refund the payment method used for purchase (usually within 30 business days of the cancellation announcement). See the FAQs below for more info about refunds for cancelled events.

If your event is currently postponed or suspended, a new event date and time have not been confirmed yet. Once an event is rescheduled for a new date and time, you don’t have to do anything: your tickets will still be valid. We’ll email you if your event is postponed or rescheduled, and you can also search for the event on our site or app to see the latest event status.

As further clarified in the FAQ, for canceled events, ticket holders will automatically receive a refund. For rescheduled shows, ticket holders are advised that their tickets are valid for the new date. Only certain shows qualify for a refund and deadlines for submitting a refund request vary by event provider. If shows do not offer a refund, ticket holders are encouraged to try to sell or transfer their tickets. For postponed shows, there is

currently no opportunity to request a refund until the show is officially canceled or a new date is announced and the show qualifies for a refund.³²

AEG has also implemented its own pandemic ticket policy on top of its ticketing platform AXS's policy, which allows ticket holders to request a refund for rescheduled shows within thirty days of the new date being announced.³³

AEG Presents will be offering [ticket holders] the opportunity to obtain refunds on shows that have been postponed due to the unprecedented impact of the coronavirus. Refund requests will be honored for any postponed show, once the rescheduled date has been announced. [Ticket holders] will then have 30 DAYS to request a refund on all rescheduled shows.

For shows that have already announced a rescheduled date, you will receive an email from the ticketing company starting on May 1 with instructions on how to refund your tickets. You will have 30 DAYS from the time the email is sent to you to request your refund. Tickets purchased AFTER the rescheduled date has been announced will not be eligible for this refund.

If your show hasn't announced a new date yet, please hold on to your tickets. You will be receiving an email notification from the ticketing company when the show is rescheduled, along with information on how to request a refund should you choose not to attend the rescheduled event. Note that if you wish to attend the rescheduled show, your original tickets will remain valid for the new date.

Like its platform AXS, AEG's policy offers no course of action for ticket holders to obtain a refund for shows in the postponed state.

Live Nation's Ticketmaster fell under scrutiny after it changed the language of its refund policy online amid the growing impact of the pandemic on large gatherings. On March 13, Ticketmaster's policy stated that "refunds are available if an event is postponed, rescheduled or canceled"

while on March 14 the same page showed only that “refunds are available if your event is canceled.”³⁴ Ticketmaster stated the language change was in line with its refund policy over the last few years despite the above change, and clarified that:

In many cases, event organizers will provide you with the option to request either a refund or a credit toward a future event. Please note that if your event is canceled, you do not have to request a refund as it will be processed automatically in as soon as 30 days.”³⁵

Under this policy, ticket holders get a full refund on canceled shows and may opt for a refund if a show is rescheduled or postponed.³⁶ Despite the similarities between AXS’ and Ticketmaster’s policies, Ticketmaster was heavily criticized for not allowing more restitution for fans and for changing the language of its policy. The legal and reputational ramifications are discussed later.

Since this controversy occurred, Live Nation introduced its ticket refund plan, which is arguably more lenient than any other in the industry.

Ticket holders will automatically receive a refund for cancelled events. Alternatively, if your show is at a Live Nation venue (list below) you will have 30 days to opt in to receiving a 150% credit to use towards buying future tickets. See more information below.

Tickets will automatically be valid for the new date, unless you opt for a refund within 30 days of the new show date being announced. Emails will be sent to ticket holders notifying them of their options. If you have tickets to a show that is postponed, you will be able to select your refund option once the new date is announced. If 60 days has passed since a show was postponed and no rescheduled dates have been announced, the 30-day window for refunds will open at that time.

Like all other policies, for canceled shows, ticket holders will receive an automatic refund. Unlike other policies, Live Nation is also allowing

ticket holders to opt to receive a credit for shows at Live Nation venues. For rescheduled shows, ticket holders may opt to receive a refund within thirty days of the new date being announced. Finally, if a show has been postponed for sixty days without a new date being announced, a thirty-day refund request period will automatically open up.³⁷

Independent Venues Ticket Refund Policies

With over two thousand independent venues registered through NIVA and many more operating globally, it is difficult to accurately cover the scope in which they handled ticket refunds during the pandemic.³⁸ However, a convenient sample of twelve venues from major music markets may offer some insight (see Exhibit 10).

Independent Venues Ticket Refund Policies				
Venue Name	Location	Refund Policy?	Addressed COVID?	Changed Policy?
Neumos	Seattle	Yes	Yes	No
Bottom of the Hill	San Francisco	Yes	No	No
The Satellite	Los Angeles	No	Yes	No
Hi-Dive	Denver	Yes	No	No
First Avenue	Minneapolis	Yes	Yes	No
The Bomb Factory	Dallas	Yes	Yes	No
Off Broadway	St. Louis	No	Yes	No
Empty Bottle	Chicago	No	No	No
Smith's Olde Bar	Atlanta	Yes	No	No
9:30 Club	Washington, D.C.	Yes	No	No
Bluebird Cafe	Nashville	Yes	No	No
Le Poisson Rouge	New York City	Yes	Yes	No

Exhibit 10. Independent venues ticket refund policies.

After doing a content analysis of the websites of these independent venues, half specifically addressed the COVID-19 pandemic either on the homepage or FAQ section. Out of the twelve venues, nine have a refund policy posted on their websites or event pages and all had some variation

of “no refunds” or “sales are final.” Finally, using the archival tool Way-back Machine⁴⁰ it was found that none of the independent venues altered its ticket refund policies after the declaration of a national emergency in the United States.

An interview with NIVA’s founder Adam Hartke⁴¹ provided more insight into how these policies, while officially remaining the same, may have not been strictly adhered to in order to better serve their customer base. As a general proxy for the members of NIVA, as well as a promoter for venues like WAVE in Wichita, Kansas, Hartke suggested that flexibility was key during this time.

We have to work together with everybody and knowing that these are very unusual circumstances, we have to be super flexible...It’s about customer retention and keeping those positive opinions and positive reviews going.

WAVE’s ticket refund policy has never changed. However, WAVE has made exceptions and provided refunds where it wouldn’t normally have because everyone is in “crisis mode” and could not have imagined a pandemic situation when creating the policy. In the end, decisions to refund came down to maintaining relationships with customers and maintaining its role as a community-focused business. For those who did go through with a refund process, Hartke notes that those patrons were “appreciative and happy that it was an easy process” and that an estimated 95% requesting refunds had plans to repurchase tickets in the future.

Unlike large corporations like Ticketmaster and AXS, which faced challenges with refunds because they had already paid event providers and no longer had access to that capital,⁴² Hartke states that most independent venues will never consider ticket revenue earned until a show is played. This means that while independents are facing more financial trouble during the pandemic, their reserves may have allowed them to respond quicker and more effectively to refund inquiries.⁴³

Music Festival Refund Policies

As stated earlier, the first music festival in the United States to cancel due to COVID-19 was Ultra Music Festival Miami.⁴⁴ Its original refund policy states:

Organizer may, in its sole and absolute discretion elect to either, (a) issue Purchaser a full or partial refund, (b) postpone the Event for a future date and/or (c) offer Purchaser a comparable ‘make good.’

With this language in place, Ultra decided to forgo any ticket refunds to ticket holders and instead allows purchasers to choose to attend a future festival in either 2021 or 2022. In addition, it offered “benefit packages” discussed in more detail in the section below.⁴⁵

Following only two days behind Ultra Music Festival, on March 6, 2020, SXSW was cancelled by the City of Austin due to growing coronavirus concerns.⁴⁶ Much like Ultra, SXSW chose not to issue any refunds to ticket holders, as it did not have insurance to cover its losses and did not have the funds to issue refunds to every ticket holder.⁴⁷ This implementation aligned with its original refund policy as well, which states:

SXSW does not issue refunds under any circumstances. Any and all payments made to SXSW are not refundable for any reason, including, without limitation, failure to use Credentials due to illness, acts of God, travel-related problems, acts of terrorism, loss of employment and/or duplicate purchases.⁴⁸

Ticket holders were able to choose to roll their tickets over to 2021, 2022, or 2023, and they also received the opportunity to purchase tickets for another one of those years for fifty percent off. These policies were not well received and the ramifications of Ultra Music Festival and SXSW’s no refund policies are discussed in depth later.

Many other high-profile festival cancellations have occurred since the beginning of March to the writing of this paper in early July. Coachella, which was first rescheduled from its original March 2020 dates to October 2020, was altogether canceled on June 10 by the public health officer in Riverside County, California.⁴⁹ After its October cancellation, the festival allowed ticket holders to opt for a full refund including fees by July 15, 2020 or roll their tickets over to be used in 2021:

Your passes will automatically be rolled over to 2021 - no action needed. If you would prefer to swap weekends, please visit our Fan to Fan Weekend Exchange.

If you would prefer a refund, please verify that the order ID and email listed below are correct, click the circle below to confirm your choice, and enter any requested information. This page is unique to your order and email address. This cannot be edited or updated.⁵⁰

BTS Hyde Park in London, England offered another approach, choosing to automatically refund all ticket holders. With this approach, it is also offering priority access to purchase tickets for 2021.

The challenges caused by COVID-19 continue to affect the global event industry. After regular consultations with the artist community and The Royal Parks regarding the ongoing crisis, we will continue to monitor the situation before announcing our 2021 programme of artists. As a result, we believe that the best course of action is to automatically refund all ticket holders whilst this process continues. No further action is needed from your side.

Whilst we continue our discussions with the artists, we want to reassure fans that you will not miss out and if your 2020 headliner confirms for the 2021 event, you will be given priority access before the general on sale to re-purchase your tickets for that show. Full details will be released upon artist announcement.⁵¹

Alternatives and Incentives to Offset Refunds and Build Goodwill

With billions of dollars in live music ticket sales lost due to the pandemic, many promoters sought alternative methods to retain or generate much needed capital.⁵² Exhibit 11 summarizes various alternatives and incentives to offset refunds that are described in detail in this section.

A Sample of Incentives and Goodwill Building Activities Offered by Promoters			
Activity or Offer	Offered by	Action and Conditions for Patron	Type and Reason
50% off merchandise	Ultra Music Festival	Up to \$250, Expires December 31, 2020	(Incentive) No refunds available for any ticket holder
Priority admission to “Extra Ultra Hour” exclusive DJ set in 2021	Ultra Music Festival	Opt to roll ticket over to 2021 within 30 days	(Incentive) No refunds available for any ticket holder
Free ticket to a differ- ent Ultra Worldwide or Resistance event in 2021	Ultra Music Festival	Reserve on a first-come, first-served basis	(Incentive) No refunds available for any ticket holder
Exclusive access to additional tickets and upgrades for 2021	Ultra Music Festival	Must pay for upgrades, Reserve on a first-come, first-served basis	(Incentive) No refunds available for any ticket holder
150% credit at Live Nation venues	Ticketmaster	30-day time limit to opt-in	(Incentive) In lieu of a refund
Donate one ticket to a healthcare worker	Ticketmaster	Automatic when choosing 150% credit	(Goodwill) In lieu of a refund
Donate the amount of ticket to United Way	AEG	Opt-in and Consent to share personal information with United Way	(Goodwill) In lieu of a refund

Tiered exclusive incentives including: Limited edition T-shirt "Skip the Line", Ticket upgrades, Exclusive tour, Live set recording, Room rentals, and more	Cain's Ballroom	Make a donation via GoFundMe, ranging from \$10 to \$5,000	(Incentive) Crowdfunding for venue staff
Limited edition T-shirt with proceeds supporting the venue	The Historic Gillioz Theatre	Pay and order during 2-week pre-sale period	(Incentive) Crowdfunding for venue operations
"Drinks for your future self" drink voucher	Le Poisson Rouge	Donate a minimum of \$5	(Incentive) Crowdfunding for venue staff
Donate directly to venue staff support fund	recordBar	Donate any amount via Eventbrite or PayPal	(Goodwill) Crowdfunding for venue staff
Promoter stored excess produce in freezers and offered virtual farmer's market online	WAVE	Purchase goods online to have delivered or pick-up in venue parking lot	(Goodwill) Give venue staff purposeful work, help farmers distribute excess food, support the community
Food and Supply Drive	Empty Bottle	Drop off various supplies at the venue	(Goodwill) Support the community

Exhibit 11. A sample of incentives and goodwill building activities offered by promoters.

Ultra Music Festival, for example, developed a benefits package to supplement its no refund policy. This benefits package includes priority admission for an exclusive DJ set only available for 2020 ticket holders rolling their tickets over to 2021, a free ticket to other Ultra Worldwide

or Resistance events through 2021, a discount code for fifty percent off of merchandise, and opportunities for paid upgrades and other exclusive purchases.⁵³

For Live Nation, this came in the form of a 150% credit in lieu of a refund for canceled shows at any of the 136 qualifying Live Nation owned venues. Not only would ticket holders receive the 150% credit if they opted for it within thirty days, but Live Nation also committed to donating one ticket to healthcare workers for every one ticket originally purchased.⁵⁴

AEG also offered a way to donate tickets instead of requesting a refund for tickets bought through AXS.⁵⁵ In partnership with United Way, ticket holders whose shows were rescheduled have the option to donate the amount they paid to United Way's COVID-19 Relief Efforts. When selecting this option, the ticket holder's zip code is shared with United Way so that the funds can be distributed to the closest chapter.⁵⁶

Some independent venues created additional donation campaigns outside of ticket refunds to keep their venue operating. In a statement by NIVA, "Live music venues are unique from most industries in that, while generating zero revenue as a result of the pandemic, we are also refunding past ticket revenue from cancelled shows." With so many venues plagued by fixed costs that are not able to be paid by their normal income from shows, additional income from donations may provide the funds needed to keep these businesses open while NIVA continues to lobby for federal support.⁵⁷

Cain's Ballroom in Tulsa, Oklahoma turned to the platform GoFundMe and created the Cain's Family Fund to directly support its venue staff, including "bartenders, stagehands, runners, box office support, medics, security guards," and others. In a tiered incentive system ranging from a \$10 donation to \$5,000, Cain's offered things such as a limited edition T-shirt, the ability to skip the general admission line for a selected show, mezzanine ticket upgrades, a tour of the venue for up to ten people, a live set recording including tech support with the recorded tracks delivered to the client after the event, and room rentals.⁵⁸

The Historic Gillioz Theatre in Springfield, Missouri sold limited edition T-shirts as well, boasting the phrase, "Be safe. Be kind. Be hopeful." This was the same message spelled out on its marquee since it had to close in March and all proceeds went to "help offset the ongoing expenses of our closed theatre."⁵⁹ Le Poisson Rouge in New York City sold "drinks to your future self," which included a drink voucher for any donation of

five dollars or more.⁶⁰ RecordBar in Kansas City, Missouri also implored fans to donate directly to a fund supporting its venue staff, including “security, bar, technical, and kitchen staff.”⁶¹

Not only have venues enacted new ways to support their staff, many are opening up their doors to support the community at large. At The Empty Bottle in Chicago, that took the form of a food and supply drive. They encouraged patrons to bring in a variety of essential supplies, which would be housed at the venue until they could be distributed to areas of need in the city.⁶² WAVE in Wichita, Kansas created a virtual farmers market. Community members could buy a range of fresh produce and other food products online, have their goods delivered to them at home, or they could pick it up in the parking lot. They also had an option to donate a purchase to those in need. This arrangement aided WAVE, local farmers, and the broader community. When asked about this event, Adam Hartke noted, “It wasn’t really based on generating a lot of revenue, it was more about filling a need and using our space to help people.”⁶³

Legal and Reputational Ramifications

For a few companies whose policies were deemed unfair to ticket holders during the pandemic, negative press coverage and legal actions against those companies followed. Both Ultra Music Festival and SXSW faced class-action lawsuits regarding their no-refund policies. In the suit against Ultra, the named plaintiffs and those who fall into the class of ticket holders are seeking restitution in the form of “damages and monetary relief for the plaintiffs and class, and/or refund ticket holders the cash they paid for their tickets in full.” The representative on the case, Joe Sauder, also followed with this statement:

We understand that the COVID-19 pandemic has impacted every part of the global economy but we do not believe that gives the Ultra Music Festival the right to shift the burden of this extraordinary crisis onto its customers, who, in some cases, paid hundreds of dollars to attend this festival and now the COVID-19 pandemic has or will preclude them from ever using any credit.⁶⁴

SXSW has also been named in a class-action lawsuit for its no refund policy, with the plaintiffs claiming unjust enrichment and breach of

contract. The suit claims “SXSW has, in effect, shifted the burden of the COVID-19 pandemic onto festival goers...individuals who in these desperate times may sorely need the money they paid to SXSW for a festival that never occurred.”⁶⁵

Though both festivals had these no-refund policies in place prior to the pandemic, and the ticket holders agreed to them upon purchase, they had never, before the COVID-19 pandemic, been tested for enforceability to this magnitude. The outcomes of these cases, though undetermined at the time of this writing, may set a precedent for no-refund clauses for festivals in a post-pandemic world.

Not only were previously-set refund policies getting challenged, policies that had been altered after the start of COVID-19 were being criticized as being unfavorable to ticket holders. Ticketmaster and Live Nation were named in a class-action suit for “retroactively revising” its ticket policies. The plaintiffs are seeking “damages, injunctive relief and restitution.” The case outlines that:

Prior to the coronavirus outbreak and at the time that Plaintiff and Class Members purchased event tickets from Ticketmaster Entertainment, Inc., a division of Live Nation Entertainment Co., Ticketmaster assured customers that Ticketmaster would refund ticket purchase prices “if your event is postponed, rescheduled or canceled.” After the coronavirus outbreak forced the cancellation or postponement of most large events and public gatherings, Ticketmaster retroactively revised its policies applicable to the prior ticket sales to allow for refunds only for canceled events, not postponed or rescheduled ones, including when postponed events are “indefinitely” postponed.⁶⁶

As the case was filed prior to Live Nation’s newest refund policy, it is unclear the state of the case and what the outcome may be. Regardless, the press coverage regarding fan outrage and the lawsuit was immense, and may have caused considerable damage to the reputation of the company.⁶⁷

Discussion and Conclusion

This paper contributes to the ongoing conversation surrounding the state of the live music industry through the pandemic and beyond. Its con-

tributions are threefold. First, it provides a chronological account of the deteriorating state of the live music industry due to COVID-19. Second, it offers a qualitative analysis and visual representation of close to three hundred live music events affected by the pandemic. While the qualitative data provided by *Billboard*⁶⁸ was immensely helpful to the industry and these researchers, the information shared was in paragraph form, inconsistently displayed, and incomplete. In this paper, the authors extend upon the existing *Billboard* data by leveraging modern technological tools to make this data more complete and publicly available for research purposes. Further, with the advent of more online academic journals, providing an interactive visual representation of the data seems fitting for those with an increasingly visual appetite. Finally, the paper provides a summarized account of many ticket refund policies and highlights the legal and reputational hits a company may face when policies are perceived as unjust.

While our paper answers some of the questions about the who, when, how, and what associated with cancellation status and refunds, it prompts a number of questions for future research. It would be interesting to measure the satisfaction level of ticket holders when comparing the response of large promoters to those of independent promoters. Would the duopolistic nature of the *big two* yield a satisfaction level that is statistically different from those who engage with independent promoters and venues, which are often an important part of the fabric of local arts communities? Related, it would be beneficial to discover if the largest promoters have a significant advantage over smaller promoters when it comes to providing incentives that would offset refund requests. Furthermore, based on an initial review of the literature and interviews, it would be interesting to catalog the various ways promoters have gone about building goodwill with community stakeholders in the midst of a crisis. While at least one national promoter has offered to donate a ticket to healthcare workers to build goodwill (and possibly offset refund requests), there are thousands of smaller independent promoters who have utilized their limited resources to serve the local community as well. A catalog of these creative efforts could serve as inspiration to other promoters. Finally, the refunds offered during this pandemic prompts the question, if refunds can be provided during a crisis, why can't partial refunds or transferability of tickets be embraced after the pandemic? Xie and Gerstner⁶⁹ and Guo⁷⁰ have put forth research that would suggest a partial refund policy may have a positive financial outcome for live concerts with high demand. The evidence may

show that a partial refund policy may also allay some of the fears of fans wanting to purchase tickets in a post-pandemic world filled with economic uncertainty.

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The *Journal of the Music & Entertainment Industry Educators Association* (the *MEIEA Journal*) is published annually by MEIEA in order to increase public awareness of the music and entertainment industry and to foster music and entertainment business research and education.

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Music & Entertainment Industry Educators Association
1900 Belmont Boulevard
Nashville, TN 37212 U.S.A.
www.meiea.org

The *MEIEA Journal* (ISSN: 1559-7334)
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