



Co-funded by the
Creative Europe Programme
of the European Union

LIVEDMA
JANUARY 2023



POST-COVID19 CHALLENGES IN THE LIVE MUSIC SCENES ACROSS EUROPE

© ELODIE LE GALL
TRANS MUSICALES 2022

TABLE OF CONTENTS

INTRODUCTION

- **SUMMARY** P.3
- **RECOMMENDATIONS** P.4
- **THE FUTURE IS NOT WHAT IT USED TO BE** P.5

GOTTA BOOK'EM ALL! P.8

The non-regulated restart of live music activities is putting the independent sector and emerging artists at risk.

GIVE ME BACK MY AUDIENCE! P.12

Audience development and community building as a core concern for the live music organisers.

WHERE ARE OUR MINDS? P.14

The live music sector is facing an alarming shortage of skilled staff and volunteers.

MUSIC IS NOT NOISE P.18

Organising local diplomacy to preserve local music scenes

A PATH OF GREEN P.25

The ecological transition of the live music sector as an opportunity to create fairer and more inclusive conditions for the music ecosystem

CONCLUSION

- **WHAT KIND OF FUTURE DO WE WANT FOR THE LIVE MUSIC SCENES?** P.31
- **LIVE DMA IN 2023** P.34
- **CONTACT** P.36

SUMMARY

Almost a year after the reopening of the live music venues, clubs, and the relaunch of festivals in Europe, **the long-lasting impact of the Covid-19 is disrupting the music ecosystem**. The live music sector is over-heating, with an increased number of events, especially during the festival season, which **creates more competition and tensions** between the music stakeholders than ever. Indeed, the live music economy has always bore fragile business models, which are now **aggravated by the raising artistic, production and energy costs**. The live music scenes are still in survival mode and they have to sell out most their events and/or increase their audience capacity and audience incomes to get a chance to stay financially sustainable. The situation represents a **risk for the independent live music scene**, as we can observe a growing concern about buy-outs of independent music festivals by larger non-music related firms, as well as aggressive strategies on the booking processes. It also **endangers emerging artists and their teams**, as bookers have less financial capacity to take risks on programming non-mainstream artists who might not attract large audiences and therefore provide enough incomes.

The situation is exacerbated by a brain drain and lack of staff, especially in technical production, since the Covid-19 lockdowns. Mental health of music professionals, which was addressed as a core issue for the cultural sector these past years, must be taken very seriously. Do we want to continue the way it used to be? How to de-escalate and preserve our staff and our organisations while supporting a growing artistic offer?

At the same time, it seems like the two years of pandemic and restrictions had an impact **on the audience who is not fully returning to live music activities yet**. Is it just a slow process that will require a bit more time and again more energy from the venues' teams to gain their audience back, or a signal of a long-term trend that will require live music organisers to reconsider their entire way of working? **What is the mission of the live music scenes in the post-Covid19 area? And how to re-establish the importance of cultural spaces in our societies while they have been considered as non-essential and declared riskier than any other places during the pandemic?** The rise of neighbours complaints about noise since the reopening of venues and clubs and relaunch of festivals demonstrates that we need to define spaces for local mediation and raise more political support towards the local music scenes, to include live music representatives in the city planning, and support more community building actions.

More and more initiatives towards a green transition are flourishing in the live music sector, as the climate emergency awareness is rising in our societies. It pushes **the live music organisers to take responsibility, act and implement new strategies to reduce their carbon emissions, but also to rethink the relevance of their current economic model**, based on infinite growth of events' production and careers' development, in terms of sustainability.

In this context, what are the live music organisers needs in terms of regulation and support from policy makers? How can live music organisations provide support to the live music venues, clubs and festivals teams in providing a fairer, more inclusive and sustainable conditions? **The current report aims to define the challenges identified by Live DMA members during the network's autumnal activities and design the milestones of our 2023 activities, based on observation, resource, exchange of good practices, capacity-building and bottom-up of proposals and collective design of policy recommendations, to contribute to an effective dialogue with policy makers at local, national and European level.**

RECOMMENDATIONS

10 RECOMMANDATIONS FOR THE FUTURE OF THE LIVE MUSIC SECTOR IN EUROPE

The live music sector requests an urgent attention from European policy makers and cooperation between the European Members States to support their local music scenes. The independent live music operators need public support to fulfil their core missions in terms of artistic diversity and inclusion to balance their financial risks. Live music associations are willing to work hand in hand with official representatives for the sake of the sector, not just to repair a leak in the system but to sustain adequate models for the future.

In line with the [One Voice for Music](#) initiative, launched under the French presidency of the European Union and followed-up by the Czech presidency in 2022, as well as the Music Moves Europe preparatory action, **Live DMA releases its proposals to answer some European priorities : support employment and the working conditions for the artists and music professionals, drastically reduce our carbon emissions, and enhance a diverse musical expression across the globe.**

In addition, the Live DMA recommendations also attach **importance to include the local populations and local environment in the development of relevant policies :**

1. Create a working group with EU institutions and live music representatives to define the scope of support to live music venues, clubs and festivals in the Members States.
2. Create an ambitious European Music Observatory to monitor the fast evolutions of the sector, especially regarding audiences practices and the live music sector's competitiveness.
3. Regulate the energy costs and index subsidies on the inflation rates to maintain the live music activities.
4. Re-inforce the EU and national support schemes for venues, clubs and festivals to book emerging artists.
5. Support community building actions in the live music scenes and local audience development.
6. Support slow touring initiatives, including residency programs in the funding schemes.
7. Develop local diplomacy tools and include live music representatives in urban planning strategies and sound regulations policies (see more detailed proposals p24).
8. Support alliances with education systems to provide trainings and certification for live music professionals and develop their skills.
9. Improve the working conditions and wages for the cultural workers to keep the sector attractive, especially to young professionals.
10. Regulate the maximum artists fees and ensure fair remuneration for all within the Status of Artist to reduce gaps and pressures on the live music ecosystem.

○ THE FUTURE IS NOT WHAT IT USED TO BE

Live DMA, the European association for live music venues was founded 10 years ago by national associations from Spain, France, Belgium, the Netherlands, and Denmark. The network now counts 20 members across 16 countries.

10 years ago, live music representatives were joining forces to improve the conditions of the live music across Europe. They shared a mission statement to obtain recognition for the artistic, cultural, social and economic impact of our local music scenes.

10 years later, Live DMA produces facts & figures, gathers resources, expertise and good practices; Live DMA provides tools and supports the advocacy capacity of the live music associations; Live DMA is one of the main interlocutors to represent the live music sector at European level.

VISIT LIVE DMA WEBSITE



○ THE FUTURE IS NOT WHAT IT USED TO BE

Back in 2012, Live DMA invited 30 participants, people working in live music venues, to join a seminar, “The future is not what it used to be”¹. The goal of the seminar was to imagine future scenarios and offer a space of reflection about the possibilities to adapt for music professionals.

Back in 2012, the participants imagined scenarios where audiences would run the venues, public institutions would collapse, or where people would access all the cultural contents on-line. None of these scenarios would become reality, but they stretched the imagination of the participants to think out of the box and actually provide ideas to address current challenges of the time.



© Ludivine Pellissier, MaMA Festival & Convention 2022

Indeed, none of them could imagine the major crisis that would hit the world some years later. The impact of the restrictions related to Covid-19, climate emergency, and the invasion of Ukraine have shaken all of us in a short-time. The live music scenes are barely recovering from the impact of Covid-19, and they are facing rapidly increasing costs, rough competition, staff crisis, ecological concerns, and less predictable audience behaviours (no-shows, last-minute tickets purchase, etc).

What will the future of the live music scenes look like in 10 years? How to imagine a bright future when dealing with so much uncertainties?

¹ the seminar was part of a Erasmus project “Lighthouses” and hosted in partnership with TransEuropeHalles and VNPF in Amsterdam.

○ THE POWER OF COOPERATION



© Olga Ruiz - Bufalo Produkcioak, Live DMA at BIME 2022

Live DMA members gathered this autumn to share their worries, fights, and get support from each other to sustain the future of the live music scenes.



15 live music venues' teams gathered for the first time to start implementing collectively a step-by-step methodology called The Try-Angle to **support their reflections and actions in building new audiences by going beyond the usual conception of a concert** [READ MORE](#)

With our Survey group, 15 live music representatives are **developing their capacity to collect data and analyse the challenges of our sector**, especially on venues & festivals business models, but also booking practices and artistic development. [READ MORE](#)

All together, the Live DMA members discussed **how to adapt our practices towards a fairer, more inclusive and sustainable live music sector** through panels and informal sessions this autumn, at music conferences from Hamburg to Zurich, Paris, Prague and Bilbao. [READ MORE](#)

The very large engagement of live music representatives during these events, as well as the great interest of the conferences' attendees in the panels and workshops has demonstrated **how crucial live music scenes are for the whole international music sector.**

GOTTA BOOK'EM ALL!

THE NON-REGULATED RESTART OF LIVE MUSIC ACTIVITIES IS PUTTING THE INDEPENDENT SECTOR AND EMERGING ARTISTS AT RISK.

Live music venues, clubs and festivals remain one of the sector hardest hit by the pandemic. As “first ones in lockdown and last to re-open”, they suffered multiple restrictions for almost two years, in 2020 and 2021. There was a **lack of consultation** between the live music sector and authorities. Therefore, restrictions did not match its reality (e.g. the impact of bar sales restrictions on non-subsidised venues or the obligation of seated concerts, the impact of seated cultural events on concerts compared to cinemas) and sometimes resulted in **insufficient or exclusive recovery funds** (live music venues are not always included as cultural operators).

COVID19 SURVEY REPORT

STAY ALIVE PUBLICATION

Since the reopening of live music scenes in spring 2022, live music venues, clubs and festivals suffer from an unprecedented economic pressure, aggravated by the inflation crisis, especially on energy costs.



“We have all the postponed and rescheduled shows of all the tours that didn’t happen in 2020 and 21, they were all moved to 2022 and on top of it, you have all the new upcoming artists. So, there were more music events and concerts, basically, than in 2019. But there’s the same amount of audiences and there’s less workers. So it’s not that the pandemic is over and we reopened and everything is fine. I think it will be a long term process to actually recover from everything.”

Arne Dee, Live DMA’s Survey Coordinator

Venues and clubs face high inflation in 2022, especially for energy, but also for other expenditure such as accommodation costs, workers costs, and catering purchase. They also face a lack of income, independently of their financial model. The venues mainly relying on subsidies struggle since the latter have not increased enough to compensate inflating costs, and the venues mainly relying on audience income struggle to attract music lovers: tickets and catering prices are rocketing, triggering an accessibility concern for audiences that might become priced out of live music. **Venues and clubs are then battling to maintain an accessible offer to develop and engage with audiences, who are worried about recession and general living costs and do not prioritize gig tickets.**



© Duo Ruut, Tallinn Music Week 2022



“Venues are facing a raise in operating costs that impacts the ability to stay open and provide live shows to the audience. We still don’t know in the next months or years how bad it will get and we don’t have a really clear idea of the inflation rates. So it’s a changing situation and we have to keep up day by day on new information that are coming from our members. And secondly, all of this comes on top of what we just talked about. So COVID crisis is not over yet even if we are open and we’re working, there are still a lot of things. Venues are facing a lot of pressure.”

Gaiane Kevorkian, KeepOn Live Project Manager (IT)

○ GOTTA BOOK'EM ALL!

Live music associations are currently working on shared methods, at the different national scales, to follow-up on the inflation costs for live music scenes and provide recommendations to policy makers to limit them. Still, **numerous venues across Europe are planning to stay closed from mid-December until end of January to limit their energy costs and bills. In addition to the alarming sign of closing cultural spaces to audience and artists, this might also worsen the booking pressure in the upcoming months.**

In terms of artistic programming, the consequences of the Covid-19 restrictions and inflation crisis seem to be impacting emerging artists the most. In the last [Survey report](#), we calculated the artistic impact and there were 1.9 million fewer artists performances in the two years of pandemic. There was also over 730 million euro less spends on artists, so the financial impact of Covid-19 was really harmful for the venues, but the artists were the biggest victims of the whole pandemic.



© Noémie Croissac, MaMA Festival & Convention 2022



"I think that the emerging artists are maybe in the worst part of the picture. Because there's a lot of concerts programmed in the music venues, there's not so much audience attending the emerging artists concerts. Of course, the emerging artists are taking the worst part because international touring is coming back. There's been a long time during which you could not see an international band playing in your town. So that's more attractive than an emerging artist.

Also we have to count that the music venues are not in a comfortable situation right now. They had been struggling for two years. So sometimes they cannot take some risks or the same risks that they did like two or three years ago: programming more emerging artists or unknown artists now, they have to be more strategic for their programming and programme artist they know will sell tickets."

Adriana Alcover, ASACC Communication Manager (CAT)

○ GOTTA BOOK'EM ALL!

To summarize, these last two years, the emerging artists did not get a chance to perform at all. Now, performances have resumed again, but audience habits seem to have shifted to more solitary activities and towards seeing mostly headliner acts, with exceptions for the clubbing activities or more local and festivals with specific aesthetics. In addition, with the financial pressure related to the resuming of international tours and inflation, emerging artists might not be booked as much in the future.



"There are increasing costs which are not compensated by more audience income, and it's also not compensated by more subsidies, because the subsidies are not indexed here. So that means there will be less money at the end of the year. So when we ask, concretely, from our venues, what is the first thing they will cut back, 70 % of the venues say risky programme. We will book less new and emerging artists, we will book safer acts to make sure that we have enough income."

Arne Dee, VNPf Policy Officer

This trend should be taken into consideration seriously, as it does not only represent a short-term threat for emerging artists but for the whole music ecosystem that relies on the live music scenes' landscape to develop the artists careers.



© Diana Pshkovich, Tallinn Music Week 2021

GIVE ME BACK MY AUDIENCE!

**AUDIENCE DEVELOPMENT AND COMMUNITY BUILDING AS A CORE CONCERN
FOR LIVE MUSIC ORGANISERS.**

○ BRING THE AUDIENCE BACK!

On Wednesday 26 October 2022, representatives of 17 live music venues from different parts of Europe gathered in BIME, Bilbao to work together on the question of audience development. They were invited by Live DMA to join an experimental project over 2 years – the test-driving of a tool for audience development and community building, the Try-Angle. These venues gathered with the willingness to reflect on their work practices, learn from their peers, participate in a collaborative project that will benefit many other venues and, most of all, take care of the social links that are born out of live music events.

Between 2020 and 2021, the venues and clubs experienced 141 million fewer audience visits, about an 80 % decline from pre-pandemic times. Beyond the numbers, this also means that the habit of live music has shifted during those two years, especially with younger audiences, and this change in habits is surfacing post-covid.



"How we spend our free time has changed since Covid-19. For example in Catalonia, we have a good weather, people want to go outside all the time, and it has been difficult to get people again in indoor venues. Also there's some people, of course, that are still afraid of COVID nowadays. So I think one of the challenges is trying to be attractive again."

Adriana Alcover, ASACC Communication Manager (CAT)

Indeed, 2 years after the pandemic, during which social isolation and closing of venues was a safety measure, the big question is how to bring people back to venues? How to convince people and policy-makers that there is a tremendous added value to being together with others, in the same room, as an active piece of the larger puzzle which is live music?

Even before the pandemic, the question of audiences was already a challenge for venues. Live music professionals have always had in mind how to bring together new audiences, younger audiences, less privileged audiences around the joy of music. Live music professionals have always had at heart the question of thinking outside the box and expanding the experience of live music in their venue, and to as many people as possible. These are some of the questions, challenges and expectations that the 17 venues gathered in Bilbao will tackle over the months to come.

Live DMA, helped by audience development expert Ken Veerman, will facilitate the venues' exchange of knowledge and ideas, in order to build a tool that will help live music venues navigate the audience question. And perhaps, more than just this tool, this project will help build a community of live music organisers who wish to step aside from the usual conception of concerts, and be as passionate about the people who come to their venue than they are about the music they want people to discover and socialize over.



© Sveta baar, Tallinn Music Week 2021

WHERE ARE OUR MINDS?

THE LIVE MUSIC SECTOR IS FACING AN ALARMING SHORTAGE OF SKILLED STAFF AND VOLUNTEERS.

○ WHERE ARE OUR MINDS?

We have seen during the Covid-19 crisis that a lot of people have left our sector: cultural workers working in venues and festivals have undertaken new jobs, new careers. Especially in production, a lot of technicians changed sectors. In Norway a survey last year ²¹ showed that 20 % of people working in production found new jobs. Resulting from that, not enough skilled people were working as technicians during festivals of the summer 2022. Workers are overworked and it has been quite a tough summer for many festivals. It has also been harder to recruit young people and finding volunteers to get involved, especially during the festival season. Because we have this two-years gap now, young people are coming up and we have to teach them again what is volunteer work at music events.

HOW TO OVERCOME SUCH AN ISSUE? IS IT A TEMPORARY ISSUE OR A LONG-TERM TREND?

Behind the issue, live music representatives are questioning the current growth and speed of the sector. Last decades have been about bigger events, larger sceneries, getting more audience, more artists on the programme etc. **Recent data shows that some venues in the Netherlands do 40 % more programme than what they did in 2019 (mainly because of rescheduled Covid-19 concerts).** This year, there is more programme than ever but this model is reaching saturation, and is not viable anymore: on many levels, we are talking about reducing our carbon impact and preserving mental health of the artists and workers.



"We've always been an industry that has worked too many and too long hours, and we've also glorified this. We need to change the mindset"

Ingrid Stroom, Head of Music Estonia, tour & production Manager (EE)

In the age of music being all around, doing less programming would mean giving artists fewer opportunities. At the same time, a lot of bands cannot live from touring anymore and cancel their tours because they aren't financially viable. **The sector is overheating and we need to find a good balance to ensure good conditions for the live music sector in the future.**

HOW DO WE TACKLE THIS ISSUE - DO WE LET IT JUST ORGANICALLY HAPPEN, AND CANCEL SOME FESTIVALS AND SHOWS OR DO WE DO SOMETHING TO INCREASE THE NUMBER OF PEOPLE GETTING INTO THE INDUSTRY?



"Next summer we will have the same problem in our sector because Bruce Springsteen is touring, Rammstein, Coldplay, Beyonce, U2... because they haven't toured the last couple of years, and they're all touring at the same moment, and they will take all workers in our sector. So next summer we'll be crazy again.

In order to run that big tours, you really need experienced personnel and you can't go out with kids who've never done this before... I think we'll see more and more cancelling. But then, what can we expect with the energy crisis is not growth, growth, growth, but it's recession. So I think there will be a correction. The correction will happen on its own."

Ken Veerman, Strategic Advisor for music venues and cultural organisations (BE)

○ WHERE ARE OUR MINDS?



We are in a crisis mode and the show must go on, we need urgent solutions, and there might be some crashes. We've been talking about how poorly people were being paid before the pandemic. Then during the pandemic, we said we have to go through this difficult period and then we'll get ready again to work on better conditions. Then we started again and now we say it's a bit of a new crisis, we need to work harder and more and with less experience and security. So maybe next year we'll do it better. And I think we have to be very careful with these promises that's year to year promises. We need a plan"

Ken Veerman, Strategic Advisor for music venues and cultural organisations (BE)

WHAT WILL BE THE LANDSCAPE IN TWO YEARS AND HOW DO WE WANT TO MAKE IT BETTER THAN IT WAS?

Live DMA members (Norway, Switzerland, Finland, France) are implementing actions of training, mentorship and capacity building to recruit and upgrade cultural workers skills.



In Norway, the live music association [NKA](#) has developed a 3 years project supported by foundations with an approx. budget of €150.000

Target group: people between 15 and 25.

Objective: encourage young people to develop a career in the music sector (music venues and festival organisers) with:

- 100 participants doing an internship in 5 different festivals in summer 2023, through training seminars starting this autumn 2022.
- A leadership programme for young leaders through 4 sessions to build competences and get new skilled profiles in the venues and festivals.



In Finland, Tampere University of Applied Sciences is working on an initiative that helps sector's former workers to find their way back to the live music sector. They build up a training that includes also on-the-job learning.

Training includes courses that develop students technical skills, knowledge of sustainability and security in live music, marketing, but also leadership skills. Other educational institutions have same kind of initiatives but [LiveFIN](#) is taking part in this very initiative as a steering group member.

Addition to this initiative, LiveFIN is searching for possible fundings to develop mentorship program to the field.



In France, [FEDELIMA](#) and the trade union [SMA](#) have decided, with the support of the National Centre for Music, to launch support to the leadership position in music venues, consisting of several modules, namely:

- History of current music venues
- Communication with public partners and the media
- Management and contracting methods
- Non-profit organisations and governance
- Which management in the cultural sector?
- What HR tools?
- Accounting and budgetary management tools in the management function

In addition to the educational content provided by expert speakers in their field, and throughout the duration of the support, the participants will be able to share their problems and help each other in a supportive manner, with the aim of breaking the feeling of isolation and loneliness that can appear when it's about meeting the challenges of leadership.



In Switzerland, [Petzi](#) members in the Fribourg region have submitted a cantonal project to set up training for technicians and paid internships to face the staff shortage.

The live music venues organise their own trainings within 5 organisations, with a total of 60 trainings days on sound and 30 days on lights. The projects aims at opening to other cantons and other sectors such as theatre.

The problem is clearly not only on recruitment but also on working conditions and wages. Our organisations need to work on labour market agenda to negotiate better fees, including for freelancers. Organisations would also need to connect with educational systems to complement what people learn in school and what the sector needs.

MUSIC IS NOT NOISE!

**ORGANISING LOCAL DIPLOMACY TO PRESERVE
LOCAL MUSIC SCENES**

○ MUSIC IS NOT NOISE!

Back in 2019, Live DMA launched its Working Group “[Music is not noise](#)”. With this Working Group, representatives of the Live DMA network exchanged information on the different sound regulations in their countries. From this exchange, resource and good practices were gathered, such as an [overview of the different sound regulations](#) in different countries part of the Live DMA network.

One objective of this Working Group was also to gather a common advocacy voice, notably because the World Health Organization had just released some guidelines where live music was categorised as leisure noise, besides road traffic noise and railway or aircraft noise. The main purpose of these guidelines was to protect human health from hearing loss. Yet, our Working Group wanted to react and make the point that you cannot consider music the same way you would consider aircraft and railway noises, because sound is embedded in music. We thus released a [White Paper](#) which gave us the opportunity to enter into dialogue with the World Health Organization. Live DMA representatives went to the World Health Organization to participate in the consultation and we invited representatives from the World Health Organization to participate in the in the Stadt Nach Acht conference on nightlife culture.

After this dialogue, the World Health Organization released its recommendations to the Member States, a [global standard for safe listening in venues and events](#) in March 2022. This standard includes our recommendations, and the dialogue shows that live music professionals are responsible, but they need support and some rules are not applicable to the different venues’ situation.

**MUSIC
IS NOT
NOISE**

www.live-dma.eu

Now, Live DMA set-up a task force to follow-up on this topic. The task force meets regularly to see how the standards are implemented at different national levels and exchange information on these implementations. The task force also shares good practices such as prevention campaigns. But what was discussed in the recent meetings is that, since the end of the lockdowns and restrictions related to COVID-19, an increase in neighbours’ complaints was felt. A new chapter on our work regarding sound management needs to be open. Not only on the sound regulation level, but more on the mediation and local diplomacy related to sound.



“It was more or less two quiet years. Now the bass is back, but it has not become louder. Festivals and music venues have the same sound levels and regulations as before.”

Marc Wohlrabe, Livekomm Board Member, Director Stadt nach Acht Nightlife Policy Conference, Clubcommission Berlin Co-Founder (DE)

The Covid-19 crisis brought a strong break into our social system and the way we deal with culture. While the cultural spaces were in lockdown, people relied on many cultural products at home: books, movies, music among many others, to endure isolation.

○ MUSIC IS NOT NOISE!

During this period of time, many of us missed the social interactions connected with cultural activities, and how distance, streaming and social networks could complement but not replace the physical experiences. Although it has not been assessed yet, we feel like this period of time represented also a shift in peoples' lives, both professional and personal, changing their relationship with jobs and homes. In this context, Live DMA members have been noticing a change in audience behaviours but also with neighbours' relations.

If, on one hand, many music venues' teams are renewing and recalling the importance of their mission towards audience engagement, especially at local level, reflecting on their own practices and will to develop their community building capacity, then on the other hand they also face a rise in complains from neighbours since the end of lockdowns.

The noise nuisance can come from the sound levels performed during the concerts, but mainly also from the audience when they leave the venues or clubs.

HOW TO SOLVE CONFLICTS AT LOCAL LEVEL AND HIGHLIGHT THE SOCIAL VALUES OF OUR LOCAL MUSIC SCENES?



In France, the law about noise comes from a study about health issues related to noise. Indeed, if we look at the long-list of how noise impacts health, very few are connected to the live music activities. However, if the law is implemented the way it is written now, it directly endangers the survival of small music venues and clubs.

Because when you are in a small capacity venue with drums, the sound levels are already above 105 dB, which also means that aesthetics such as punk, metal, hip-hop, techno, are endangered."

Yacine Mokhnachi, project manager, Collectif Culture Bar-Bars (FR)



In France, organisations such as [AGI-SON](#) were created to mediate the discussions between music professionals and policy makers on sound management.

AGI-SON carries the voice of live music organisers but also provides prevention campaigns and training for the music sector to adapt their practices and develop technical solutions. In most of the European countries, such dedicated organisations do not exist and are part of the missions of live music associations.



"In Germany, we have a lot of politicians who are on our side. They are trying to help us figure out the legal situation and to deal with the neighbours and, also, to invite police and other structures, other parts of the government to round tables. And this is a very huge support that we have from local politicians especially, not from the federal level. In Germany you have to understand we have the federal level,

then we have the 16 Parliaments of the States and then it comes down to a communal level. So laws often come from the federal level. They're interpreted and given on the state level and then the communal level is executing them.

○ MUSIC IS NOT NOISE!

If you have a communal situation where your environmental department and maybe the Police Department is quite open for roundtables, we don't have so much problems.

But on the other side, we have maybe other regions or other people, (depends also maybe sometimes from what kind of party they are coming from) where they use the existing law to make us more problems, and here we need the political help for the roundtables."

Marc Wohlrabe, Livekomm Board Member, Director Stadt nach Acht Nightlife Policy Conference, Clubcommission Berlin Co-Founder (DE)

It appears that live music scenes need a strong political message and support, on the regulatory side, to implement adapted and tailor-made rules, but also on the mediation side and relation with local authorities or populations.



"The festival exists for almost 25 years, but it has changed location and therefore environment two years ago. It has always been a festival related to electronic music, from hip-hop to electro, and previously it was on a time schedule and format that corresponded to these aesthetics, so eminently at night, from 6 p.m. to 6 a.m.

I give this as a context, because so far we had not had any major problem with the neighbourhood on noise. We are now in this new environment with new residents, with a new sociological and social typology. In 2021, the festival was very constrained because of the Covid-19 restrictions, and so we had to stop our activities at midnight.

The fact remains that in this very constrained context, there was an outcry from local residents. For the 2022 edition, we took over and revised our format a bit, and we have, in particular in the light of the new site in which we are, in the open air, which is a garden, reconfigured our festival so that it operates from 2 p.m. to 2 a.m. We consider that the discomfort until 2am is still less difficult to bear than 6am. But this is not heard by the local residents.

They were quite virulent, and some of them set up an association called the "collective of local residents" which does not only target our organisation. Indeed, we are in a new area with a lot of open-air events and **this is the accumulation of events during the summer season which becomes very difficult for them to bear**. Except that as we are, as an event, let's say, the most visible and structured, it was easier to come and attack us while other organizers are less easy to target.

We received a letter from a lawyer mandated by this group of residents. We did not take things lightly, and decided to see what things we could implement to try to take this discomfort into account and contain it as best as possible.

We apply the regulations, of course, but the sound decree imposes a limit of 3 dB of spectral emergence³ for open-air, but this rule is inapplicable and put us out of the scope of the regulations.

But in fact, it is the text that is not well adapted to our activity. However, we decided to take the subject into account, to work on what bothers the most neighbours, namely the low frequencies, which are not within the framework of the regulations. We worked on a subject that is not included in the framework of the law, we actually did more than what is recommended, because we are aware that it is the low frequencies that create the major inconvenience for local residents. We went as far as to work with a sound engineer and work with an acoustician to modify our own sound system but also raising awareness among our own sound engineers, because it's another way of working on sound monitoring.



© Marsatac Festival 2022

Some local residents at the end of the event thanked us because it created a real progress and improvement, especially for everything concerning the rear and the sides of the stage, to already ensure that the sound only diffuses from the front. On the noise level, we remained within the framework of the law, but the fact remains that when the inhabitants are 80 meters from the stage because we are in urban territory, it creates discomfort.

Some others were very much stuck on “you have not complied with the regulations”. From there, I don’t know how we can manage to stay within the spectrum of the 3 dBs that are allowed to us in terms of spectral emergence. It was a political decision by the city of Marseille to give authorizations for the festival to be held there, and the fact remains that the politicians, those who are really alongside the local residents, are rather more easily convinced by the local residents than by us, the organizers, whereas they are fervent defenders of our artistic project.

³ Spectral emergence is defined by the difference between the ambient noise level, comprising the particular noise in question, and the residual noise level consisting of all the usual noise, exterior and interior, corresponding to normal occupancy of the premises in the absence of the particular noise in question.

○ MUSIC IS NOT NOISE!

The dialogue is engaged, we organized an open day only for local residents, to install a sample of our new sound diffusion system. Some appreciated it, others did not come to the meeting that we proposed so as not to endorse our efforts. Well, that was an illustration. But what we have put in place is intended to be replicated, duplicated, if you encounter similar difficulties, we are at your disposal to help you think, and what gives me satisfaction is that we add to our reflection the equipment rental companies and equipment constructors, and there is the will to work in this direction, but it will take a lot more time than the complaints of the local resident who knocks on our door every day.”

Béatrice Desgranges, Marsatac Director



© Marsatac Festival 2022

Apart from that, **new possible regulations on ventilation in music venues might also have an impact on the live music scenes.** The obligation to have a performant ventilation system, to install CO2 meters, to run a risk analysis and to have an action plan would require extra and heavy investments from the venues in order to be in line with the new regulations that are imposed by the authorities.

Music venues are concerned about air quality rules in indoor venues accessible for the public, but **strongly recommend to take into consideration the context in which music venues operate.** Extra ventilation measures would also mean extra possible noise hinderance for the neighbourhood.

RECOMMENDATIONS

During the “One Voice for European Music” day in Prague, live music associations from different European countries also sat at a table to discuss possible recommendations:

PROTECT VENUES AGAINST ADMINISTRATIVE CLOSURES FROM NOISE COMPLAINTS

- Especially often based on no legal measurement
- We need venues protection on a legal basis and not only on the basis of temporarily good relations with local policy makers.

RELEASE THE VENUES’ RESPONSIBILITY ON NOISE OUTSIDE THE VENUES

SUPPORT VENUES INSULATION TO LIMIT THE NOISE DISTURBANCE

PROVIDE MEDIATION TOOLS

- Based on existing good practices
- Mediation must be done by external civil organisation, night watchers
- Support venues community building such as Open Club Day.

PROVIDE ADAPTED TRAINING FOR THE SECURITY STAFF

- Challenging because often service providers
- In-house security is important to match with the venues values but it requires more budget.

A PATH OF GREEN

THE ECOLOGICAL TRANSITION OF THE LIVE MUSIC SECTOR AS AN
OPPORTUNITY TO CREATE FAIRER AND MORE INCLUSIVE CONDITIONS FOR
THE MUSIC ECOSYSTEM

Since 2020, Live DMA started to [collect resource and good practices](#) among the European live music scene on ecological sustainability. The Digital Safaris on Sustainability give live music professionals from all around Europe the opportunity to virtually visit live music scenes that work in an ecological way. From catering to sustainable building, up to the mobility of the audience and artists, the inclusive actions put in place or the way they manage waste, the Digital Safaris are a place for exchange of concrete tips on how to think and act in a sustainable manner in a live music venue, club or festival.



At the same time, Live DMA members expressed that, although accessing and sharing knowledge and experiences are crucial to support the music professionals and volunteers in their transition, **we need to take collective measures to initiate a structural change in our sector and request more political actions with a common voice.**

The music industry's transformation relies on involved professionals and qualified experts who will be the driving-forces to enrol and empower their peers, to reveal their capacity

to make effective change, not only as citizens, but as a mass of liable decision-maker along the music value chain.

Live DMA, as European association representing mainly small and medium sized enterprises and non-profit organisations from the live music industry, commits to empower and support them in adapting their practices while maintaining economic viability, and advocating for adapted rules for the sector.



"What can be the impact of change as a single venue? You know, regarding the standards of carbon impact, our venues, even the biggest ones, are very low. The biggest carbon emissions come from the big industries and cities.

But if we tackle this argument as an umbrella organisation, and if we count on every single little impact of change our venues, we can have a very large impact and be more powerful."

Federico Rasetti, Managing Director at KeepOn Live, and Event Manager (IT)

Sustainability is a paradigm for thinking about the future in which environmental, societal and economic considerations are balanced in the pursuit of an improved quality of life. Live DMA's roadmap on ecology is inscribed into a sustainability approach, which means also considering some social and economic indicators. Live DMA's strategy on sustainability was drafted based on an exploration of the results of existing carbon footprint analysis of live music venues and festivals, the attendance of dedicated panels and workshops in live music conferences, complimentary lectures, and an online Survey from the Live DMA's members needs.

○ A PATH OF GREEN

The results of an online survey on the needs of Live DMA members (national associations) show that:

- Most of Live DMA members (national associations) **have inscribed sustainability as part of their organisation's strategy**
- When implementing actions, Live DMA members **focus on: awareness campaigns, measurement actions and programmes, carbon reduction projects** (food, waste, equipment...)
- The members' sustainability strategies **connect with SDG's or other national initiatives**
- The **main barrier for Live DMA members is the staff capacity**. They do not have the capacity to hire dedicated staff to implement dedicated sustainability actions, and the staff who gets responsibility of such projects need dedicated training.
- Live DMA members **need to exchange at trans-national level** on carbon footprint calculators uniformization, green management strategies and green transition mainstreaming/engagement (or how to work on a larger scope of members and not the same driving-forces) and **connect with expert organisations on sustainability**
- Regarding **possible common actions**, Live DMA members mention touring, exclusivities clauses, investment in venues buildings, and reflections on audience mobility.
- Live DMA members also feel the need to **work at trans-national level to “look at the big picture”, and not only carbon reduction strategies**.

Live DMA aims at tackling sustainability challenges and taking responsibility as an umbrella organisation, reflecting on its members shared vision and engaging change thanks to a local presence in every part of Europe.

RETHINKING OUR BUSINESS MODELS: AUDIENCE MOBILITY AND ATTRACTIVENESS

Roughly half of the carbon emissions of live music venues rely on audience mobility. To tackle this main issue, live music organisers are pressuring local governments to develop public transportation or bike racks nearby the venues and clubs as well as free public transportation included in the concert ticket. This challenge can be further emphasised by modern urban challenges which push live music venues and clubs from the city centres to fringe areas where public services are less developed. It can be a major issue for venues in rural areas as well, without a proper public transport offer.



© Demo Europe

However, even in city-centres, a large public transport offer does not seem to completely solve the problem. Audiences seem to prefer the use of the car as it allows more flexibility, sense of security and less stress at the end of the concert when considering missing the last ride.

For club nights, it often remains the only option if you are not willing to stay up until the first tram/buses/metros. For the live music organisers to bypass this challenge, possible options can be to develop earlier shows, but the options remain limited, especially for club nights. Some events and venues also encourage carpooling, or home-walking groups on their social media's channels. **Several initiatives are also flourishing to set-up a night-walk with live music organisers, audiences and local policy makers, to better understand where and how the unsecure feelings are created in the public space at night, in order to implement new actions to improve safety.**

NO MUSIC ON A DEAD PLANET

© Music Declares Emergency

The festivals' or venues size/capacity and the number of events per year automatically increase their audience carbon footprint. More importantly, the scope of attractiveness of a venue or an event is the most influential indicator.

“ *In a festival like Les Vieilles Charrues (FR), which brings together more or less as many people as Dour (BE), the 3% of the public arriving by plane represents half of the emissions of all the festival-goers»*

Music Declares Emergency France, [SHIFT project](#)

Since the Covid-19 pandemic, the pressure on festivals to increase their audience capacity or number of programming days has grown again, to face the increasing production costs, bigger artists fees, insurance conditions while staying economically viable. Indeed, taking advantages of economies of scales implies to grow the events and attract more audiences to increase the ticketing, catering and merchandising incomes. However, **developing more and more audience means automatically to increase the audience mobility, which has direct and massive consequences in terms of carbon footprint compared to all the other carbon reduction policies** (waste, equipment, local products etc.) that a festival can implement. The live music business models have always been fragile especially when relying mainly on audience incomes.

In a context where the costs are increasing and the subsidies are not sufficient to match this increase, the only option for live music organisers is to increase their audience capacity to get more audience incomes, which is then a non-sense in terms of carbon reduction and climate action. To match their carbon reduction objectives and ecological policies, the public authorities at national and local level must dedicate consistent funding for the live music scenes.

SLOWING THE TOURING ROUTES FOR ARTISTS

Artists mobility represents between 10 and 20% of the venues carbon footprint, but it represents a more visible part of the public debate on sustainability, and it can have a large impact in terms of awareness.

It is more logical to make the artists circulate more than to move audiences to attend shows.

There is no intention to revise here the fundamental values of arts and culture in terms of freedom of expression, mutual understanding and multiculturalism. It is for these reasons Live DMA members want to facilitate the circulation of artistic works and provide physical spaces to connect, engage and feel with others through cultural experiences, and these should not be limited. In this perspective, one also has to consider European geographical disparities: if the Netherlands are very well served by rail networks, connections with Norway are made more by plane, and the size of the country leads to long distances to be covered. Moreover, travelling by train with the music equipment can become really challenging in some countries: multiple connections, unreliable timetables, limited luggage capacity or even incapacity to travel with some instruments...

On the other hand, **more and more artists are willing to adopt more sustainable practices on touring which should enable cooperation between the different parts of the music chain (organisers, bookers/promoters, agents, managers, artists). At the same time, important gaps remain, and the question of ecological artistic mobility quickly meets the question of mental health, fair remuneration and working conditions for the artists and their staff.**



© Primavera Festival 2022



© Guillaume Kerjean, Raffut! 2022

In 2021, Clean Scene and Resident Advisor released a report “[last night a DJ took a flight](#)” looking towards alternative futures within the dance music industry, with the idea to ban private planes and exclusivities of artists headliners which seems to concentrate most of the carbon emissions. Exclusivities, or radius clauses, are clauses in live music performance contracts that stipulate that an artist won’t play shows within a certain radius of said performance for a period of time, so the show being booked won’t be undercut by competing gigs. Exclusivities represent not only a dilemma in terms of ecological footprint (creating distorted

○ A PATH OF GREEN

touring routes), but also in terms of gaps in terms of artistic remuneration (increasing gaps of remuneration between headliners and less-known artists), financial pressure and unfair competition between live music organisers.

Supporting slower touring conditions through the opening of new regional routes and residencies programmes would not only reduce the carbon footprint of touring, but also develop opportunities in terms of territorial artistic coverage and community building through the arts, with the development of smaller-scale music cities and activities with other sectors (social, education, local enterprises etc.)

INVESTING IN MUSIC VENUES' ECOLOGICAL EQUIPMENT AND SUPPLIES

Green riders are collective agreements between technicians, artists and promoters to host an artistic performance. Among the different bullet points of the green riders, vegetarian catering is one of the most efficient and cheap way to reduce the venues carbon footprint. Still, **it can be difficult to implement those riders, and it requires mediation between organisers, artists managers, and touring parties.** It is the difficult part and it is part of the organisers' responsibility, similarly to the sound levels and other "environmental rules" implementation.

In the end, green riders are **mostly a useful practical tool to communicate between the concert parties** (artists, managers, promoters, organisers) about the green charter and green responsibility when hosting an event. To host artists in more sustainable conditions, live music venues also need to renew their equipment and plan investments in the areas of technical equipment (from renewing light equipment to planning mutualisation and re-use of existing equipment), energy (also as a response to the inflation crisis), insulation (also in relation with sound regulations and urban policies), but also catering and supplies (get rid of plastic, work with local providers etc.)

MORE ON THE GREEN RIDERS

CONCLUSION

**WHAT KIND OF FUTURE DO WE WANT
FOR THE LIVE MUSIC SCENES?**

○ WHAT KIND OF FUTURE DO WE WANT FOR THE LIVE MUSIC SCENES?



© Elodie Le Gall, Trans Musicales 2022

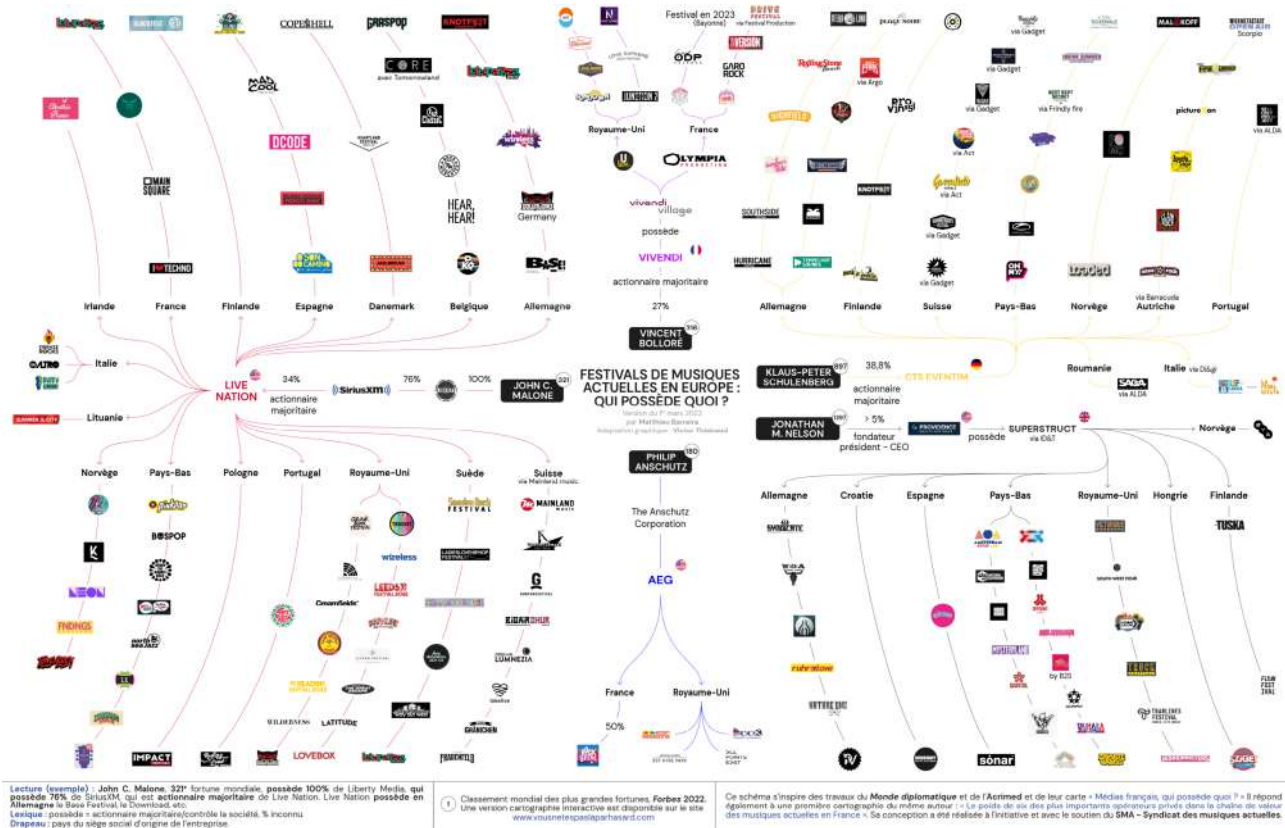
« We have an inevitable change in our sector. Because the current model is not sustainable anymore, major operators might break down. »

Since the Covid-19 pandemic, the live music operators **fear an extension of international companies monopoly on the sector**. These companies operate on two strategic levels : vertical strategy which concentrates different activities of the value chain into one operator (especially artists promotion, booking and distribution), and horizontal strategy which means owning several venues and festivals under the same company. The dominance and control of such companies on the live music ecosystem represents a very high risk for its diversity.

If these strategies operate mainly in the sphere of the large events, **it also has consequences on medium and smaller operators, as they drag artists fees up and impose exclusivity conditions**, and represent an unfair competition, especially when those large companies have other non-music related activities, and therefore a better financial capacity to afford losing money on their festival activity. **The business model of such events is not viable, especially in the light of climate emergency and sustainability** : the recent heatwaves are exploding the insurance prices until we will soon reach a point of non-return.

Over 100 French festivals have pledged the campaign « [Vous n'êtes pas là par hasard](#) » (You are not here by chance) to inform and alert about this alarming buy-outs and dominant position in the live music sector. The strategies of those companies are not purely economical. The French researcher in political sciences Emmanuel Négrier explains that this phenomenon is attached to soft power objectives : it is a way for the festivals' brands to reach young audiences, a way to offer « VIP lounges » for business partners, and create a dependency from other live music stakeholders. Some of the personalities attached to those companies are also known to fund extreme right parties and elections campaigns.

WHAT KIND OF FUTURE DO WE WANT FOR THE LIVE MUSIC SCENES?



A [map](#) created by Matthieu Barreira shows how 5 men and their corporations already own hundreds of festivals across Europe.

Looking at the past decades in the fields of recorded music, books or media should alert us to find solutions and prevent from the same scenarios in the live music sector. Those practices are not illegal, but **it is urgent to reflect on new regulations to prevent the music revenues to flow to external companies, to limit public fundings to those companies as well, stop the increase of buy-outs and regulate the maximum artists fees to preserve the independent live music sector. The sector also needs an ambitious European Music Observatory to monitor these fast evolutions within our sector.**

Let's not watch and wait for the collapse to adapt and change the way we are working to build together a brighter future. Such a hope might lead to deconstructing the notion of artistic success, and defining a European model in which slow touring offers better conditions for the artists and their teams, gives more opportunities for audiences to discover artists, and preserves the independent and the local music scenes economy.

We, Live DMA members, are committed to work hand in hand with other representatives of the music sector and policy makers to redefine fairer, inclusive and sustainable conditions in the live music sector by 2030.

○ FOLLOW-UP LIVE DMA'S ACTIVITIES AND MILESTONES IN 2023



OBSERVATION AND RESOURCE

- New episodes of the [Digital Safaris](#), don't miss them subscribing to the dedicated newsletter at the bottom of the page!
- [Facts & figures](#) about the live music venues and festivals
- Start of an exploratory study on the role of the live music scenes in career development
- Launch of a study about booking practices and challenges in the live music scenes across Europe

CAPACITY BUILDING

- [The GreenHouse](#) will be a series of online training for live music associations to **align their strategies on sustainability at national level**. To start in 2023.

The sessions rely on peers learning for professional and volunteers to empower them with solution-based methodologies, and external experts' inputs. The sessions will be based on the following topics:

- Awareness tools and arguments to unlock collective actions
- Learnings from carbon footprint tools
- Carbon reduction strategies in the live music scenes
- Sustainable business models for the live music sector
- Beyond the carbon approach of sustainability

- [The Inclusion Lab](#)

The Inclusion Lab is a capacity-building project which will provide Live DMA members with key notions and collective thinking sessions to **prepare the ground to implement inclusion policies within their organization**. Our aim is to provide live music scenes with the same amount of knowledge, methodologies, definitions and principles so as to provide live music organisers and live music associations with the **necessary keys to start inclusion policies, make them work in the long-term and take conscious and enlightened choices with regards to inclusion matters**. The focus of the Inclusion Lab will be "gender balance", even though the knowledge and methodologies shared can be applicable to other social groups and topics.

- [More Try-Angle sessions](#)

Together we have built the [Try-Angle](#): **a step-by-step method that helps beginning and experienced live music professionals build new audiences**. The Try-Angle experimentation process will offer 17 live music professionals the time and resources to take a step back and find new perspectives.

○ FOLLOW-UP LIVE DMA'S ACTIVITIES AND MILESTONES IN 2023

ADVOCACY

- An eco-task force to bottom-up recommendations and **build up a joint advocacy strategy on sustainability**

Live DMA's eco task force gathers members who voluntarily participate in monthly meetings to share sectorial evolutions related to sustainability at their national level, and **discuss all together ideas and proposals to develop or align sustainable policies at European level.**

During the first brainstorming sessions, participants have discussed topics such as carbon footprint tools, eco certifications, eco-conditionality (subsidies eligibility), contracts exclusivities, green riders' models.

- A sound task force to follow-up the sound regulations implementation across Europe, and **provide a watch on noise complaints and support local diplomacy actions.**

In the framework of SHIFT, an Erasmus+ project led by the European Music Council, Live DMA is committing to implement an internal sustainability policy and action plan for the Live DMA networks' activities.

“*The guidelines serve as a reference document for network-organisations that aim to minimise their footprint, optimise environmentally sustainable practices, and act as an example of good practice for their members and other networks. Their aim is to cover all major areas of their environmental impact, including operations, policies, activities, and governance. Special attention is given to travel and events, which are the main sources of carbon emissions for network-organisations. Implementing these guidelines will enable network-organisations to structurally become more environmentally sustainable.*”

This report's content is based on various panels and conferences in which Live DMA participated in 2021 and 2022.

Values and challenges presented in this document have been and are still being presented and discussed at several public and professional events:

- BIME Pro - 27-29 October 2021 & 27 October 2022, Bilbao (ES)
- ACCES Meeting - 13-15 December 2021, Murcia (ES)
- LiveKomm Member's Meeting - 8 July 2022, Online (DE)
- Congres Podia - 19 September 2022, Utrecht (NL)
- Reeperbahn - 22 September 2022, Hamburg (DE)
- One Voice for European Music - 27 September 2022, Prague (CZ)
- MaMA - 13-14 October 2022, Paris (FR)
- NKA Congres - 5 November 2022, Narvik (NO)
- Crossroads - 10 November 2022, Roubaix (FR)
- Nights Zurich - 11 November 2022, Zurich (CH)

CONTACT

LIVE DMA

35 rue Crucy, 44000 Nantes, France
+33 7 67 00 59 89
contact@live-dma.eu

Audrey Guerre

Coordination
audrey.guerre@live-dma.eu

Juliette Olivares

Project Officer
juliette.olivares@live-dma.eu

Lena Lozano

Research Officer
lena.lozano@live-dma.eu

Arne Dee

Survey Coordinator
arne@dee-music.com

Louise Verguin

Communication
louise.verguin@live-dma.eu

Thibaut Hermouet

Administration & Production
thibaut.hermouet@live-dma.eu

The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

