

The Survey

FACTS AND FIGURES OF LIVE MUSIC VENUES AND CLUBS IN EUROPE

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© Sebastian Ervi

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INTRODUCTION

Live DMA is a European non-governmental network representing **20 live music associations** in **16 different countries**. This report presents key numbers of the **2,280 music venues and clubs** that are part of Live DMA members across Europe. It shows important information about the artistic, social, educational, and economical value of music venues and clubs across Europe, displaying their diversity.

2019 was a vibrant year for live music venues and clubs, and so was the start of 2020. The venues and clubs programmed more artist performances and attracted more visits than ever before. This created many jobs and had a huge artistic and economic impact.

Since March 2020 the COVID-related restrictions imposed by governments had a disastrous impact on the live music sector, especially for the live music venues and clubs as key players in the ecosystem of artists' careers. The effects were devastating since artists could no longer perform, audiences could hardly enjoy live music and/or night culture, and a significant part of the venues' workers no longer had a job in the sector. Artists, hired workers, suppliers, and the venues itself lost a lot of income. Governments across Europe supported the venues in their region with funds, especially for employees' wages and housing costs. This was helpful and necessary for the venues and clubs to survive the pandemic financially, but did not prevent huge damage for the artists, workers, and suppliers in the sector.

In that sense, this Survey report might bring no breaking news, but it does **show key numbers of the impact of the pandemic**, which are still relevant nowadays. **In early 2023, we still see the negative effects of the pandemic upon the live music scenes**. There is a lack of workers and a high workload because professionals and volunteers left the sector during the pandemic. There is the challenge for venues to win back and attract new workers and audiences. There is a wea-

ker financial position for many venues after two years of income loss, having no financial reserves left. On top of this since mid-2022, venues and clubs are **facing high inflation** and rising costs for personnel, artistic programme, housing, and in particular energy. The pandemic might be over, but at the start of 2023 many music venues and clubs in Europe have a weakened and fragile position. When venues face the risk of negative financial results, they are often forced to cut back on talent development and personnel. **Sufficient support for the live music sector by governments will therefore remain very necessary**¹.

1. Read more about the current challenges for live music venues in the recent Live DMA report '[Post-Covid-19-challenges-of-the-live-music-sector-in-Europe](#)' (January 2023).



Esinam - Belvédère, Namur (BE) - 2020 © Nicolas Jaumain

LIVE DMA NETWORK

20 MEMBERS

16 COUNTRIES

**2280 LIVE MUSIC
VENUES & CLUBS**



Live DMA - BIME PRO, Bilbao (CAT) - 2022 © Bufalo Produksioak



KEY NUMBERS OF 2019

Based on data (year 2019) of 522 music venues and clubs part of 12 Live DMA members in 10 different countries, and extrapolated to data of 2,280 music venues and clubs part of Live DMA.

TOTAL 2,280 VENUES

Live DMA's music venues and clubs are essential platforms for emerging artists to build experience and meet new audiences.

281 000 MUSIC EVENTS
463 000 ARTIST PERFORMANCES
70 MILLION AUDIENCE VISITS

Venues and clubs provide paid work to many employees and hired workers such as freelancers. In addition, many volunteers are involved in the venues, especially in private non-profit venues.

125 000 HUMAN RESOURCES
of which 64,500 paid workers
of which 48,000 volunteers
of which 43% assigned with gender female

Most income of music venues and clubs is generated by audiences spending money on tickets, food and beverages. For public and private non-profit venues subsidy is also an important income part.

€1.7 BILLION TOTAL INCOME
of which 563 million euro ticket sales
of which 551 million euro food & beverage sales
of which 351 million euro subsidies

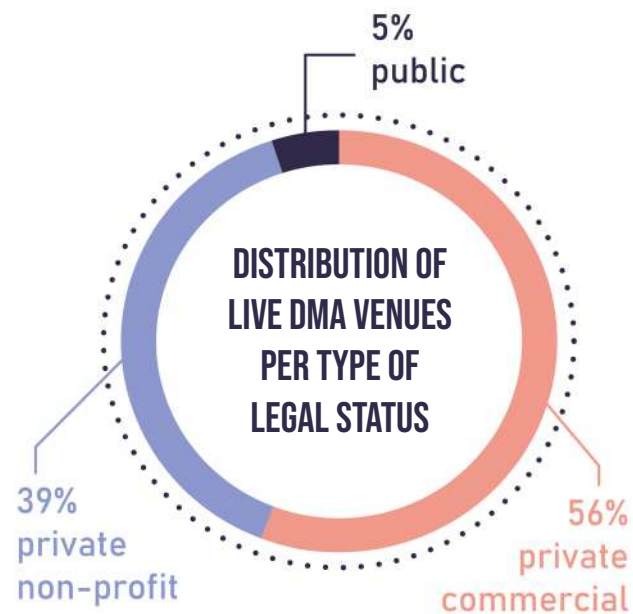
The expenditure of music venues and clubs consists mostly of programme costs such as artists' fees, and employment costs such as wages for workers.

€1.6 BILLION TOTAL EXPENDITURE
of which 496 million euro programme costs
of which 513 million euro employment costs

There is not really such a thing as an average music venue, since the diversity of the music venues and clubs is enormous regarding their capacity, functions, workforce, and business models. In the next chapters we will therefore describe the key characteristics of the music venues, taking in account the different types of legal status and capacity of the venues and clubs.

LEGAL STATUS: TYPE OF VENUES AND CLUBS

In this study we distinguish three types of venues based on their administrative format or legal status, mostly because each of these types of venues has their own distinctive characteristics regarding their functions, workforce, and income. Of the 2,280 Live DMA venues and clubs in this study:

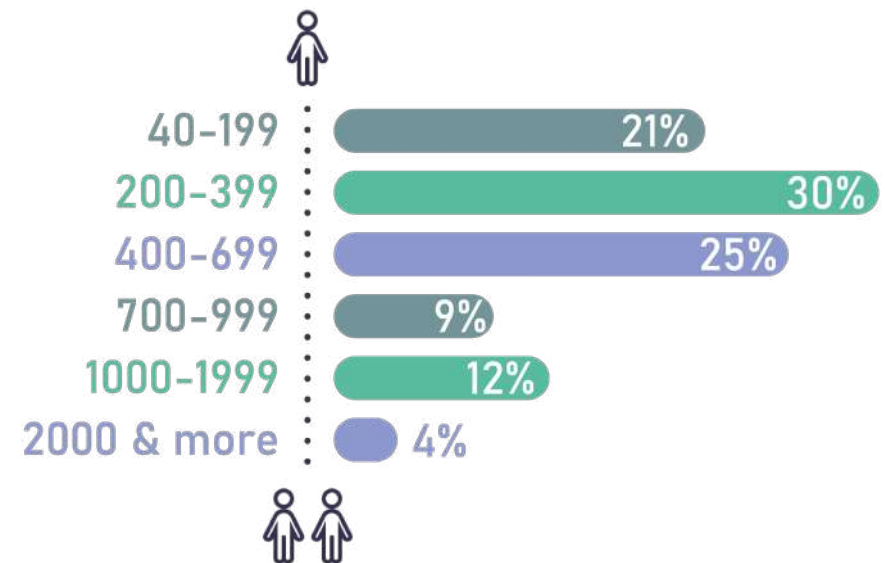


5% are **public organisations**, such as public bodies and local authorities.
39% are **private non-profit organisations**, such as associations and foundations.
56% are **private commercial structures**, such as (limited) companies and partnerships.

We need to emphasize here that most of the private commercial venues are very small organisations that operate as not-for-profit organisations.

AUDIENCE CAPACITY

DISTRIBUTION OF LIVE DMA VENUES PER AUDIENCE CAPACITY



Most music venues (**51%**) are **small** with an audience capacity under 400. One third (**34%**) is a **medium-sized** venue (400 to 999 capacity) and only **15%** is a **larger** venue. The larger venues often consist of multiple smaller concert halls.

Public venues often have larger concert halls for live music (600 median), compared to private non-profit venues (350 median) and private commercial venues (340 median).

FUNCTIONS: MORE THAN LIVE MUSIC

The music venues and clubs do much more than only presenting live music. In 2019, **85% of the organisations also had other functions**, which we divide in three main categories:

- Social and educational functions, tools and spaces for artists, artist support.
- Bar/restaurant function outside concert and club hours.
- Multi-disciplinary functions, such as presenting photography, cinema, multimedia, theatre, and other non-musical activities.

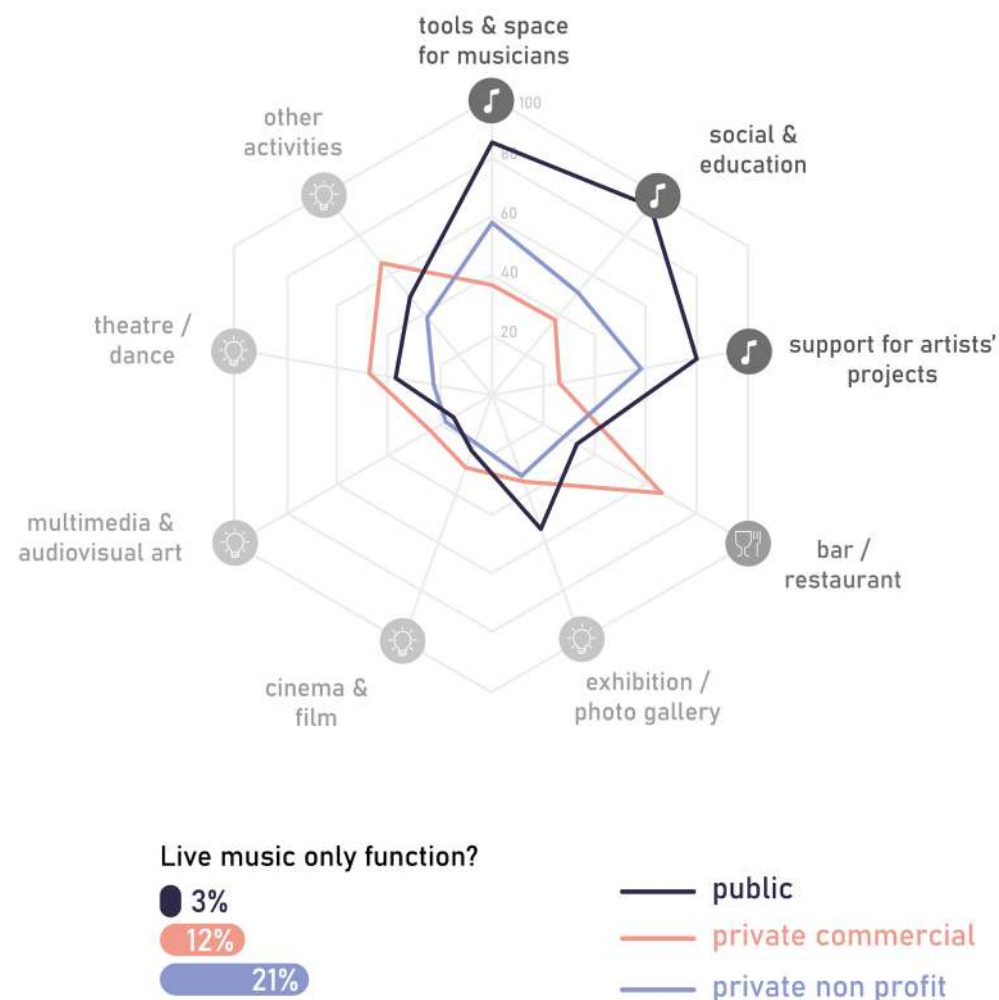
Looking at functions of venues with a different type of legal status, we see that especially public venues have almost never solely a live music function. Most of them have social and educational functions, with tools, spaces and/or support for artists' (projects). For private commercial venues a common business model is the combination of a music venue with a bar/

restaurant. For these types of venues the sales of food and beverage is essential income to cover their main expenditures. Non-profit venues often receive subsidies for employment, housing costs or specific programme and projects, and have therefore more budget for educational and social functions and artistic support.

For all types of venues within the network we see multidisciplinary centres where artists and audiences from different art forms and subcultures are connected.

Since March 2020, due to the pandemic restrictions, many venues also had to close rehearsal spaces, put artistic projects on hold, close their bar/restaurants, and cancel multidisciplinary activities. Therefore, the pandemic effects for music venues and clubs not only affected the performances of artists, but also blocked possibilities for talent development, other art forms, and other income opportunities.

SHARE OF LIVE DMA VENUES WITH CERTAIN FUNCTIONS



MUSIC EVENTS AND ARTIST PERFORMANCES

Music venues and clubs organise a diverse range of music events such as live concerts and club nights, where many different artists are presented on stage.

With a focus on talent development, music venues often present additional artist performances during music events, such as support acts, or a line-up of multiple artists during indoor festivals and club nights. **47%** of all music venues also **organised festivals** in 2019, especially private non-profit venues (60%). Performing as support-act for headliners at concerts is often an important way for local and emerging artists to gain more experience and introduce themselves to new audiences.

The average amount of artist performances per music event in 2019 differed per type of legal status, which shows that public funding for music venues allows them to programme more artist performances.

PUBLIC VENUES presented on average
2.2 ARTIST PERFORMANCES per music event.

PRIVATE NON-PROFIT VENUES presented on average
2.0 ARTIST PERFORMANCES per music event.

PRIVATE COMMERCIAL VENUES presented on average
1.7 ARTIST PERFORMANCES per music event.



Ariana Abecasis - La Nau, Barcelona (CAT) - 2020 © Clara Orozco

AUDIENCE VISITS

Music venues and clubs receive a wide range of audiences to live concerts, club nights and other activities.



In 2019, **80%** of the audiences **paid an admission fee** to visit music events, while **20%** of the visitors **entered for free**.

For **private commercial venues** **15%** of their visitors had **free entrance**, while this is **21%** for **public venues** and **24%** for **private non-profit venues**.



Honningbarna- Folken, Stavanger (Norway) - 2022 © Frank Surdal

DIVERSITY, INCLUSION, AND ACCESSIBILITY

The role of live music venues and clubs for individual and collective emancipation must not be underestimated. For the visitors, the music venues and clubs are spaces of social gathering. They can be havens of discovery, free expression, and performances where conventions and identities can be deconstructed. Venues and clubs put efforts in being a safe place for minority groups, marginalized people, and different subcultures. Diversity, inclusion, and accessibility are important topics for venues and clubs which they try to implement in all aspects of their organisation, such as their workforce, programme, marketing, communication, and partnerships.

Live DMA promote the venues' work on diversity, inclusion and accessibility while providing many tools and resources. In recent years, the '[Diversity Roadmap](#)' developed by Live DMA member PETZI in Switzerland was translated in English and promoted across Europe. The '[Try-Angle](#)' is a step-by-step methodology of live music actors which challenge them into building new audiences and go beyond the usual conception of a concert. Live DMA organises the '**Inclusion Lab**', a series of webinars and online workshops to develop policies on diversity and inclusion.



WORKFORCE

Live music venues and clubs create a large scale of jobs and skills in functions such as management, administration, programming, marketing, communication, public relations, education, production, technics, catering, and hospitality. People involved in music venues and clubs get the opportunity to develop multi-skilled careers paths as many of them often combine different tasks. The experience and skills gained by the volunteers can also help them further in their professional careers and social life.

The venues and clubs work with different types of contracts, varying from employees, temporarily workers and freelancers, to volunteers and trainees.

DISTRIBUTION OF WORKERS AND WORKING HOURS (FTE) OF LIVE DMA VENUES

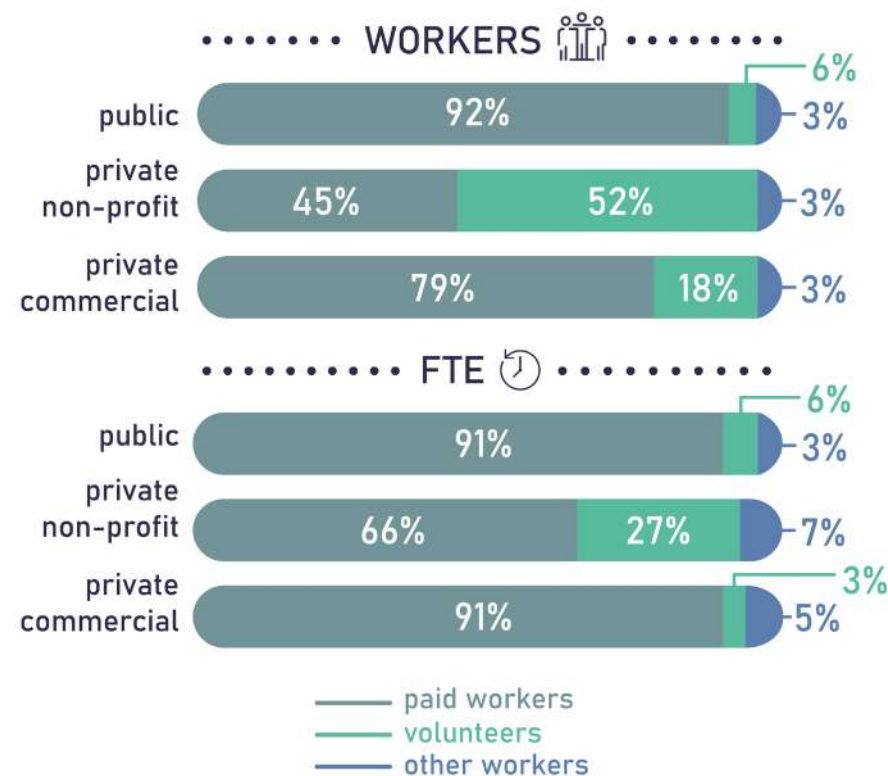


In 2019, **55%** of all workers were **paid professionals**, responsible for **77%** of all **working hours**. The **volunteers** involved (**41%** of all workers), work much less hours (3,3 hours per week) on average than paid workers (11,9 hours per week) and therefore did **16% of all the work**. Additionally, **3%** of the workforce consisted of **other workers**, such as interns and trainees, responsible for **7% of all working hours**.

WORKFORCE PER TYPE OF LEGAL STATUS

The share of paid workers, volunteers and other workers varies with the different type of legal status of the music venues and clubs. Especially private non-profit venues work with many volunteers in certain functions, while public and private commercial venues have mostly paid workers.

DISTRIBUTION OF WORKERS AND WORKING HOURS (FTE) OF LIVE DMA VENUES PER TYPE OF LEGAL STATUS



VOLUNTEERS

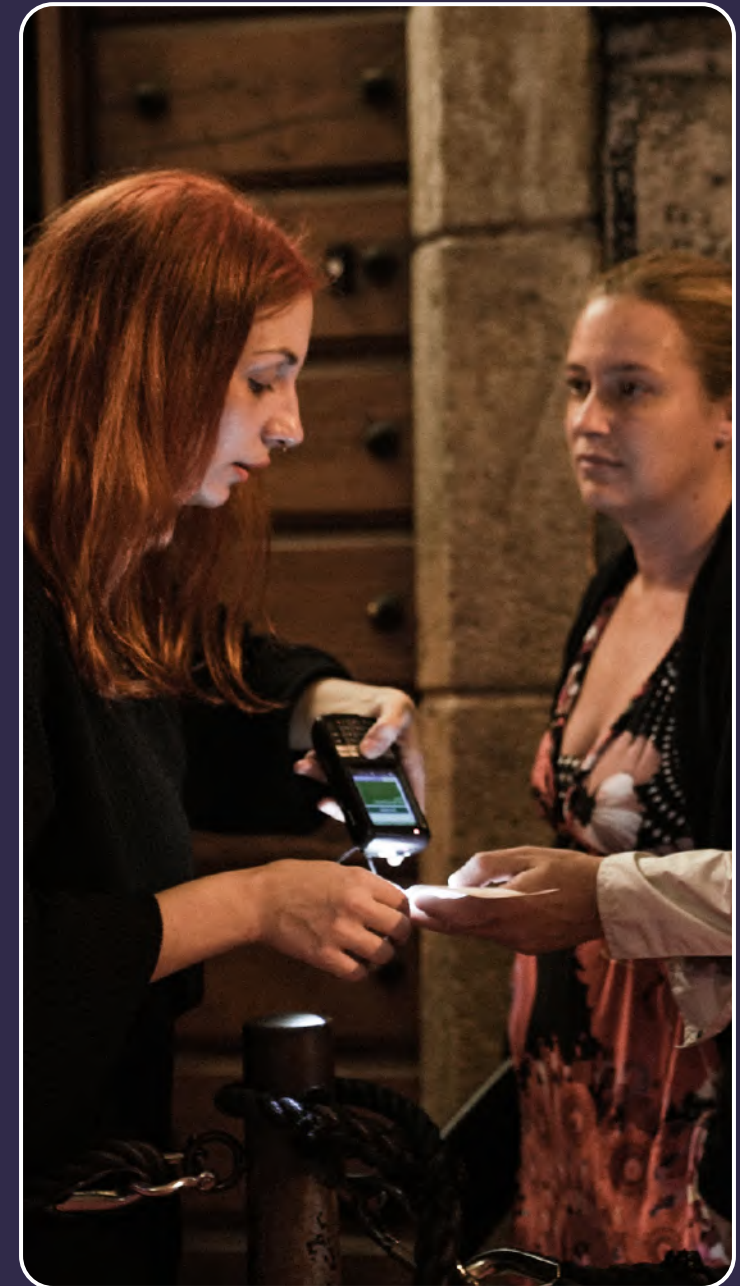
The higher number of volunteers in certain European countries can also relate to different volunteering culture and legislation from one country to another. Within the Live DMA network, especially in Belgium, Denmark, The Netherlands, Norway, and Switzerland we see a higher share of private non-profit venues and more volunteer work. In the numbers ([see page 11](#)) we don't count the well over 7,000 volunteers involved in venues of Live DMA member FEDELIMA in France, which cannot be defined as workers under the French law, but are worth to mention here as well.

The share of volunteer work in private non-profit venues also varies with the audience capacity. In **smaller private non-profit venues** (audience capacity under 700) in total **36% of all working hours is done by volunteers. Larger private non-profit venues** (audience capacity 700 or more) often have less or no volunteers at all. Here volunteers are taking **17% of all working hours.**

Although volunteer work is generally understood as time and effort that is freely given, in most countries volunteers can

get a small financial compensation and are rewarded with benefits like discounts on entrance to concerts, food and beverages, and other group activities. Also, they often carry out essential tasks during concert hours such as handling the bar, wardrobe, and helping with the lights and sound. Although the concrete impact of volunteering on people's lives is intangible, notably due to the diversity of the profiles of the volunteers along with the variety of tasks they undertake, we can count among the benefits of volunteering: social experience and emancipation, professional networking, skill development and active participation in society. Many music initiatives are based on the free commitment of music organisers, and many professionals started their career as volunteers. In that sense, the overload of administrative compliance is often expressed as a burden for volunteerly-run organisations.

In 2019, **53% of all Live DMA venues were working with 5 or less FTE paid work.** Regulations asking for too strict measures to comply with may harm the competitiveness of such organisations. Employment support schemes can therefore be very helpful for music venues and clubs.



Musicbox, Lisbon (PT) - 2018 © Ana Viotti

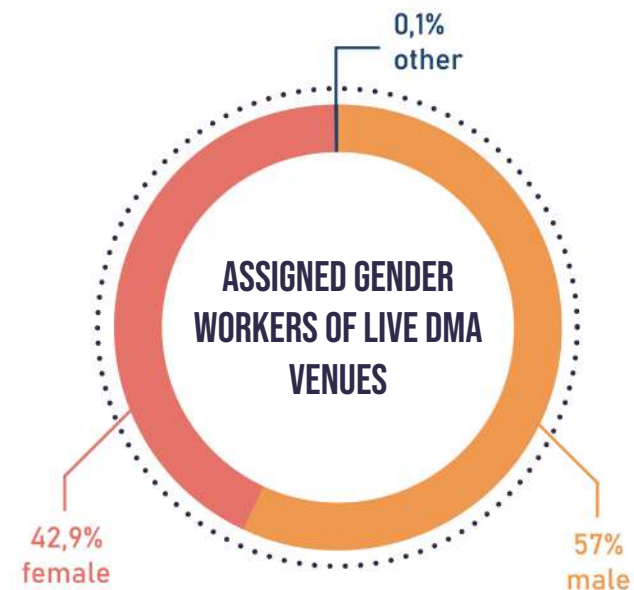
WORKER'S ASSIGNED GENDER

The Survey includes a question about the gender of the workers in the music venues and clubs. We must point out here that this is the gender assigned to the workers by the survey respondents (in most case venue directors), and not the gender that the workers might identify themselves with. The numbers are based on information collected by different methods, such as information from workers passports which could refer to sex and/or (assigned) gender identity, or surveys amongst workers, or estimated calculations. In addition, we are aware that people with other gender identities than male or female not always come out as such in public and at their workplace, which limits their representation.

Despite these methodological challenges with the collected data about assigned gender of workers we still decided to show the numbers, to give a general

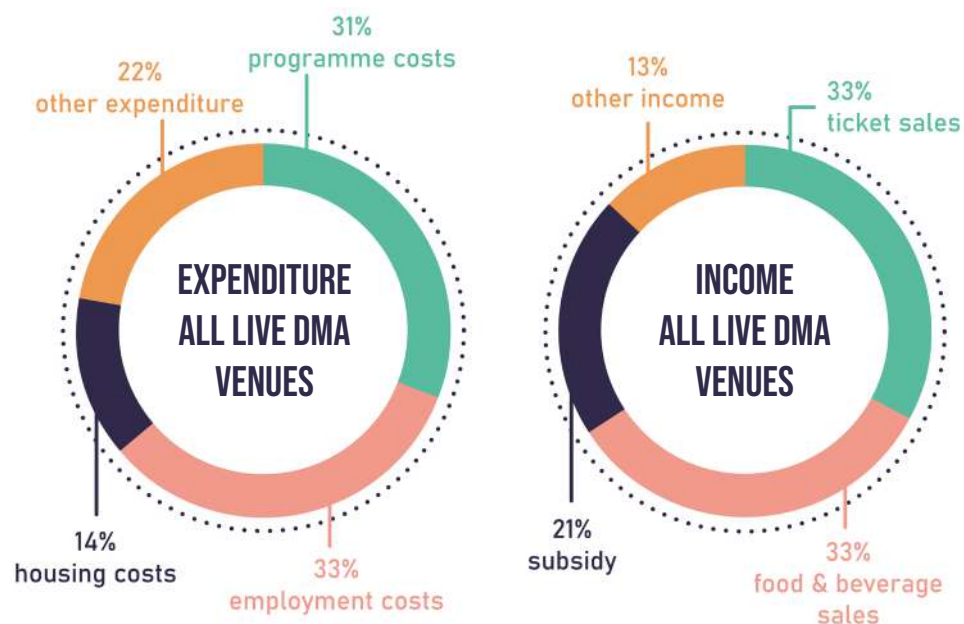
idea of the gender balance of workers in music venues and clubs in 2019. These results are based on available data (22% of all Live DMA venues) from venues and clubs in Belgium, Estonia, Finland, France, Italy, The Netherlands, Switzerland, and Spain.

These numbers don't show the fact that many job occupations are highly gendered, with men occupying more often jobs with higher remunerations, such as management and programming functions. Live DMA members develop several programmes and initiatives to empower gender minorities within the live music sector. Live DMA signed the Keychange Pledge in 2021. Keychange is a global network and movement working towards a total restructuring of the music industry in reaching full gender equality. With its Pledge, Keychange offers an effective tool and tailored support to increase representation throughout the music world.



INCOME AND EXPENDITURE

DISTRIBUTION OF INCOME AND EXPENDITURE OF ALL LIVE DMA VENUES

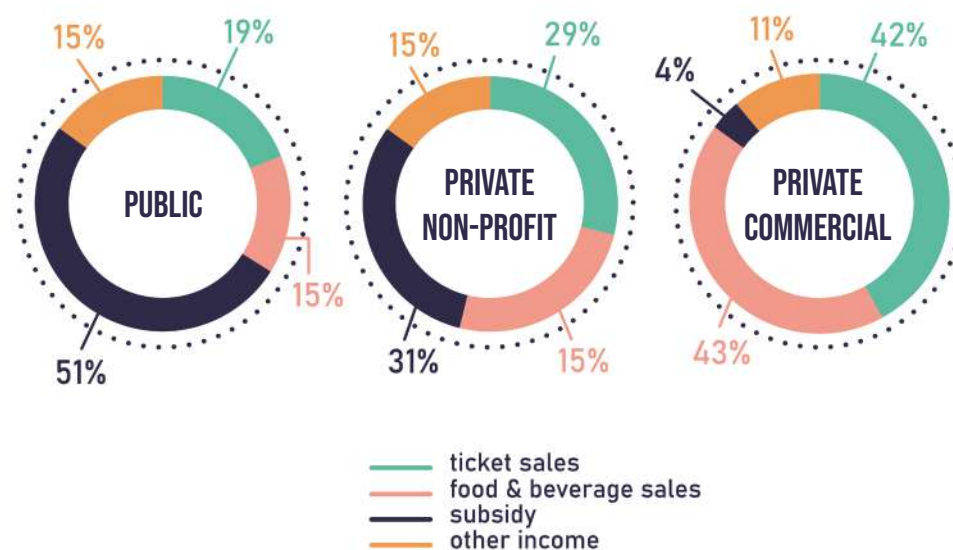


In 2019, of all **expenditure** of Live DMA music venues across Europe, **31%** was spent on **programme costs**, **33%** on **employment costs**, and **14%** on **housing costs**. The music venues' expenditure is quite similar for different types of venues (smaller and larger, non-profit, and commercial), with roughly the same share of costs for programme, workers, and accommodation.

In 2019, the **income** of Live DMA music venues across Europe consisted of **33%** **ticket sales**, **33%** **food and beverage sales**, and **21%** **subsidies**. The income models are very different per type of venue (based on legal status and capacity), and therefore important to show in more detail.

INCOME PER TYPE OF LEGAL STATUS

DISTRIBUTION OF INCOME AND EXPENDITURE OF ALL LIVE DMA VENUES PER TYPE OF LEGAL STATUS



For **private commercial venues** on average at least **85%** of their income in 2019 came **from audiences** (42% ticket sales + 43% food & beverage sales), and **4%** **from subsidies**.

For **private non-profit venues** on average at least **44%** of their income in 2019 came **from audiences** (29% ticket sales + 15% food & beverage sales), and **31%** **from subsidies**.

For **public venues** on average at least **34%** of their income in 2019 came **from audiences** (19% ticket sales + 15% food & beverage sales), and **51%** **from subsidies**.

Non-profit venues (public and private) get more subsidies than commercial venues. For **public venues** on average **51% of their income is subsidy**, and for **private non-profit venues** this is **31%**. For the latter category it's important to show the diversity between **smaller private non-profit venues (40% subsidy)** and **larger private non-profit venues (25% subsidy)**. Some large non-profit venues have none or less than 5% subsidy. Large venues can normally generate more income from ticket sales and food and beverage sales, because of the larger audience capacity, but also organise a lower share of free events than smaller venues.

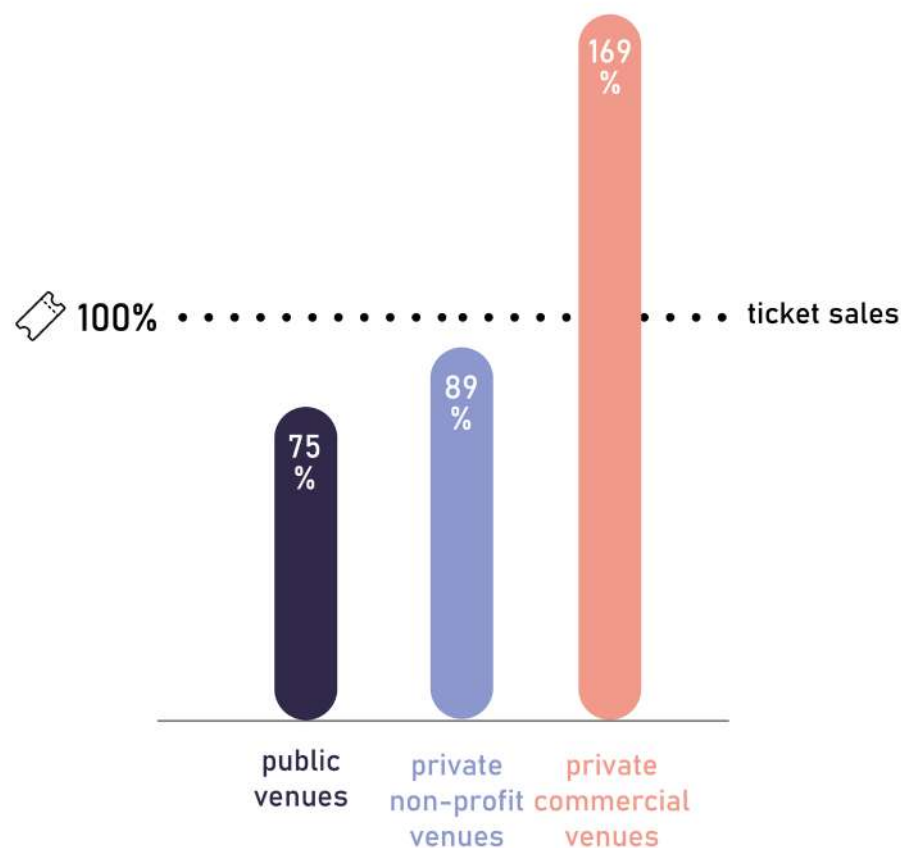
Non-profit organisations often get financial support from local or national governments as a recognition for their general interest mission and for supporting their work in programming diverse music genres and artists that are still at the beginning of their careers. Those subsidies can be structural ones or pro-

ject-related ones, to cover housing costs and employment costs, music programme, and other activities like community work and educational activities.

Regarding the **private commercial venues**, which are **56% of all Live DMA venues**, we like to point out that most of these venues **work in a not-for-profit way**, meaning they don't have any objective to make financial profit, but invest all income back in the function of music venue, such as the exploitation and programme.

When we compare the direct programme costs and ticket sales of all venues, we can see that **88% of the total ticket sales is spent on programme costs**. But in general, the smaller the venue the less programme costs are covered by ticket sales. Also, the legal status of the venues is relevant for this ratio. Venues with a higher subsidy level can spend more money on programme costs, while private commercial venues also must cover employment and housing costs with the ticket sales income.

WHICH PART OF THE PROGRAMME COSTS IS COVERED BY TICKET SALES?



IMPACT OF COVID IN 2020

The pandemic restrictions imposed by the governments since March 2020 had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues across Europe. The pandemic measures were different per country, but venues in all countries were faced with strict limitations that forced them to organise much less music events and receive much less audiences. Official pandemic restrictions across Europe included complete lockdowns, limited opening hours (curfews), limited audience capacity, seated only audiences, no or limited food and beverage sales, entrance QR-codes (1G, 2G, 3G), physical distancing, wearing mouth-nose-mask and more mandatory rules. For many venues and clubs the problem was not just one restriction, but the accumulation of many different measures at the same time.

When venues and clubs were allowed to open their doors, the audience capacity was so limited, that it was basically impossible for venues to organise music events without financial losses. In addition, there were non-official restrictions that affected music venues, such as the advice by governments for people not to travel abroad, which limited the possibilities for artists to tour internationally and perform abroad, and the advice for audiences to stay at home.

PANDEMIC EFFECTS PER TYPE OF LEGAL STATUS

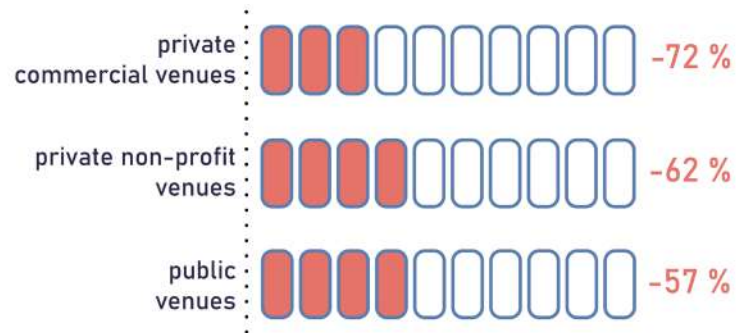
The effects of the pandemic restrictions were different per type of venue. The numbers in the next pages show that private commercial venues lost a larger part of their programme, audiences, working hours, and income than non-profit venues. Private commercial venues almost completely rely on income generated by audiences, which was mostly lost in 2020, while most non-profit venues and all public venues could still rely on regular subsidies during the pandemic to cover (part of) their fixed costs. Despite the highest need, the private commercial venues also received less COVID support money from governments than non-profit venues.



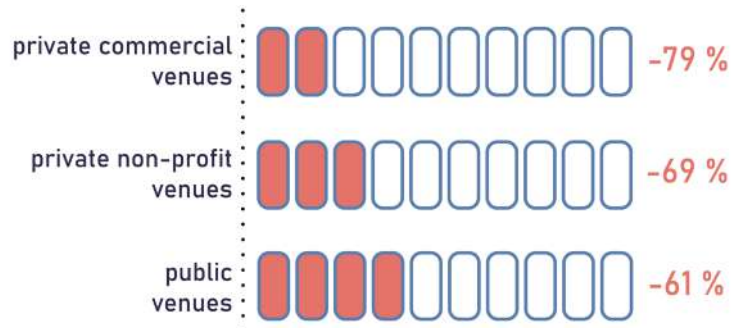
IMPACT OF COVID ON PROGRAMMING

The pandemic restrictions made organising music events and presenting artists almost impossible in 2020. As far as there was still the possibility to present live music, this was financially harder for private commercial venues than for non-profit venues, which could still depend on some regular subsidies, and received more COVID support fund.

DECLINE OF MUSIC EVENTS 2019 COMPARED TO 2020

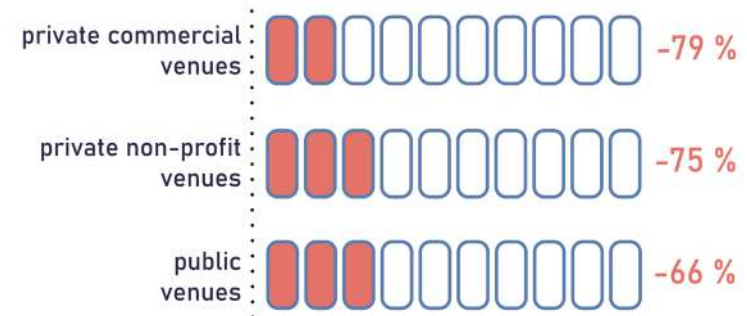


DECLINE OF ARTIST PERFORMANCES 2019 COMPARED TO 2020



IMPACT OF COVID ON AUDIENCE VISITS

DECLINE OF AUDIENCE VISITS 2019 COMPARED TO 2020



In 2020, the pandemic restrictions imposed by the governments lead to a disastrous **decline of 75% audience visits** to the Live DMA music venues and clubs, compared to the year before. The music events that were still organised often had a lower capacity, because of the restrictive measures, and club nights were mostly prohibited. Much less people came in touch with live music. This was even worse for **private commercial venues (79% less visits)**, than for **private non-profit venues (75% decline)** and for **public venues (66% decline)**.



Sala BARTS, Barcelona (CAT) - 2020 © Carles Rodríguez

FOLKEN, STAVANGER (NO)

*Portrait of large private non-profit venue
Interview with Jesper Brodersen (general manager)*



CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

Since 1988 Folken is the most influential venue in Stavanger on the West Coast of Norway. We have three rooms with capacities of 100, 150 and 650 that we use for a variety of events. Folken also serves as a center for student's cultural activities and besides about 115 concerts a year we also host plays, stand up comedy, film screenings and more. We are community driven and based on volunteers in functions from bar to artist hosting that make sure $2 + 2 = 5$.

WHAT ACHIEVEMENTS OF YOUR VENUE/CLUB ARE YOU MOST PROUD OF?

Next to legendary shows throughout the years where Folken has made great live shows available to music lovers in the entire region it's the community we're the most proud of.

LOOKING BACK AT THE COVID PANDEMIC, WHAT IMPACTED YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR) THE MOST IN THAT PERIOD?

The pandemic was really hard on the community of volunteers. Without the big events and larger audiences the fun and meaning in contributing fell apart. We are still rebuilding the Folken family, but feel like we are getting there now.

NOW IN EARLY 2023, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

There is definitely still a remaining effect when it comes to recruiting new volunteers and reshaping the community. There's also a shift back in the audience to a time where more tickets are sold closer to the event. But other than that we don't see changes that we can really say are directly connected to the pandemic.

LOOKING AT THE NEAR FUTURE, WHAT ARE THE MOST IMPORTANT CHALLENGES FOR YOUR VENUE (OR THE LIVE MUSIC SECTOR)?

For us it is the mentioned rebuilding of the community here that makes it all come together and worth while. How there's a certain magic happening when people come together to see bands they love and the people facilitating the events are doing it because they love doing it. Another challenge is how power in the live music sector is consolidated more and more with less and bigger players. It's hard to see how that can be anything but damaging to diversity. It'll be interesting to see how that develops in the next years.

WHAT CAN WE EXPECT IN THE FUTURE OF YOUR VENUE/CLUB?

It might not be the hip thing to say, but hopefully more of what we're already doing, to be honest. Focusing even more on developing new generations of cultural workers that will be nothing less than the antidote to the negative consequences of individualization in society. Marketization is ok, but it needs resistance to not dumb down what makes art and culture important to people in the first place.

© Frank Surdal

ONLINE EVENTS AND VIEWS

Music venues developed more online events than ever in 2020. With the restrictive corona measures and lack of concerts for live audiences, there was more need for artists to present themselves online and reach audiences in an alternative way. Online performances were a possibility for artists to connect with audiences at home.

In 2020, **62%** of the Live DMA music venues also **organised online music events** (broadcasts and live-streams). For 70% of the venues this were less than 10 online events in a year, but some venues did hundreds of broadcasts in 2020. There is not only a high diversity in the number of online events per venue, but also in the number of views. On average an online music event attracted 4,200 views.

The online events were sometimes subject to ticketing, but often for free with an option to donate. In total **5%** of all views in 2020 **were paid views**.

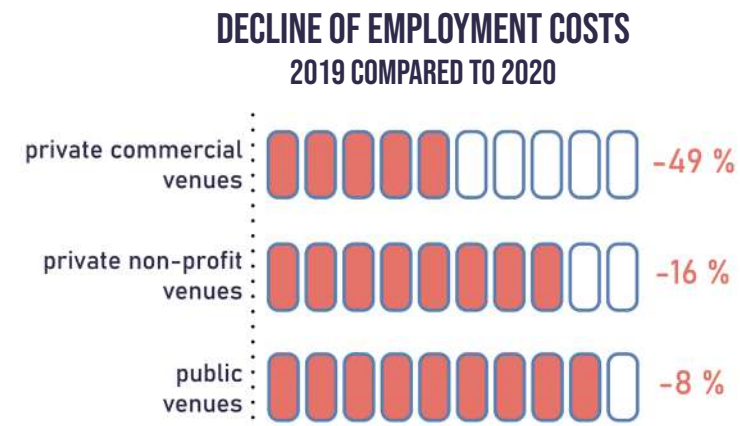
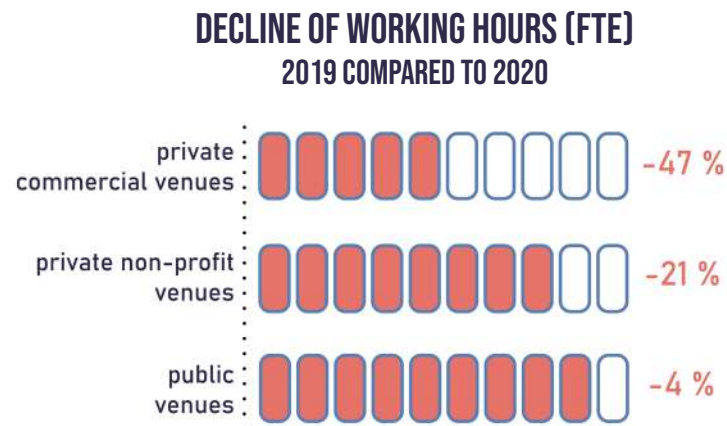
An example is the [KeepOn Air streaming platform](#), launched by Live DMA's member Keep On Live during the pandemic. It offers a space for audiences, artists, and live music professionals to connect and keep exchanging all together. The aim of the platform was to show that live music venues, clubs and festivals are social gathering spaces.

This initiative proved they could partly remain as such, even in times of forced isolation. The platform also helped Keep On Live in getting better recognition for live music scenes from their local government.



IMPACT OF COVID ON WORKFORCE

Obviously the pandemic restrictions imposed by the governments since March 2020 also had a big impact on the workers in the music venues and clubs. Especially for 'event-related' functions such as production, technics, and catering jobs there were much fewer working hours available, because of all the cancelled and limited music events. In most countries, COVID support money was available for wages for paid employees on the venue's own payroll. But for many hired staff such as freelancers and temporarily workers, venues could not offer work and wages anymore.



Regarding their workforce, the private commercial venues were more affected than non-profit venues. Public venues have relatively more paid employees on their own payroll, which could largely be kept in service due to COVID support fund for wages. This explains why only **4% of working hours (FTE) in public venues were lost** in 2020 compared to 2019. **Private non-profit venues** also have many paid employees, but combined with volunteers and hired paid workers. This type of venue **lost on average 21% of all working hours (FTE)** in 2020. Private commercial venues have a high share of hired paid workers, for whom there was much less work and money available. In total **47% of all working hours (FTE) in private commercial venues was lost** in 2020.

Especially for certain types of functions such as sound and light technicians, production staff and catering crew, there was a lack of working hours and income during the pandemic. Because of this many of the freelancers and temporarily workers left the live music sector. This loss of workers as well as their knowledge and experience (the so-called *brain drain*) are still a problem in 2023 when writing this report².

2. Read more about the current challenges for live music venues in the recent Live DMA report '[Post-Covid-19-challenges-of-the-live-music-sector-in-Europe](#)' (January 2023).

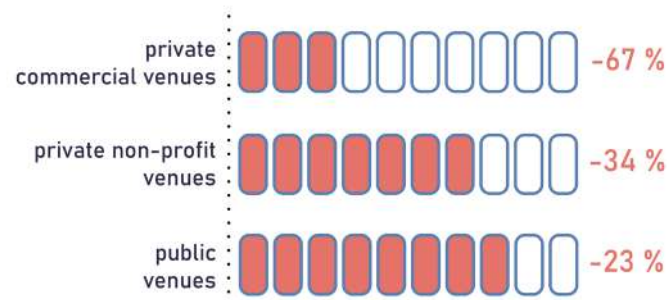
IMPACT OF COVID ON INCOME AND EXPENDITURE

The pandemic restrictions imposed by the governments since March 2020 had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues across Europe.

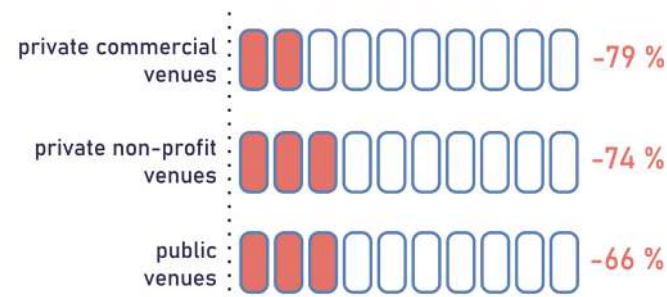
This clearly shows when comparing the venues' financial numbers of 2019 and 2020.

The effects of the pandemic restrictions were different per type of venue. Private commercial venues almost completely rely on income generated by audiences, while most non-profit venues and all public venues could still rely on regular subsidies during the pandemic to cover (part of) their fixed costs.

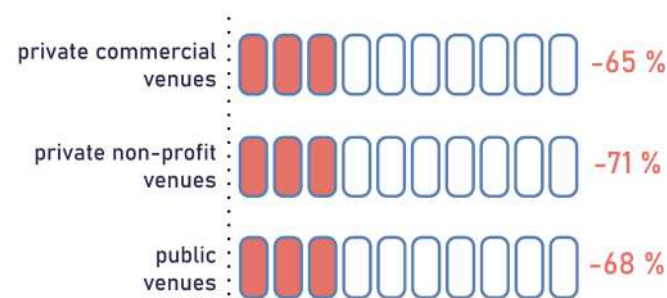
DECLINE ON TOTAL INCOME 2019 COMPARED TO 2020



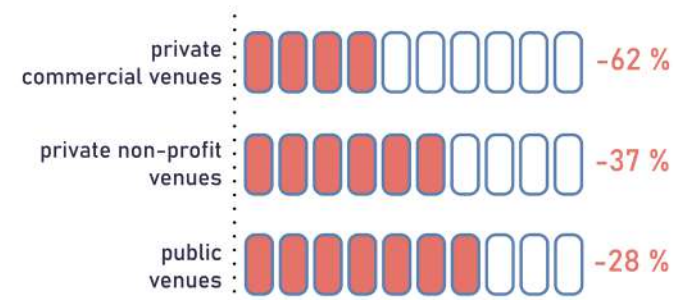
DECLINE ON INCOME OF TICKET SALES 2019 COMPARED TO 2020



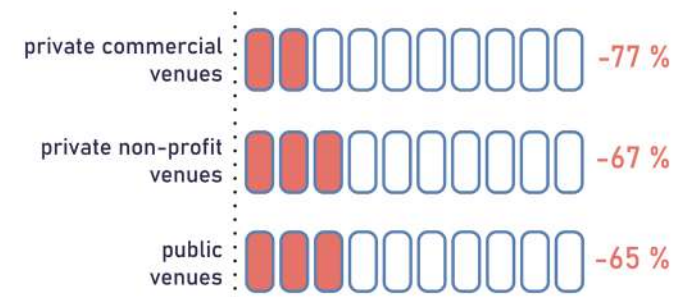
DECLINE ON INCOME OF FOOD & BEVERAGE SALES 2019 COMPARED TO 2020



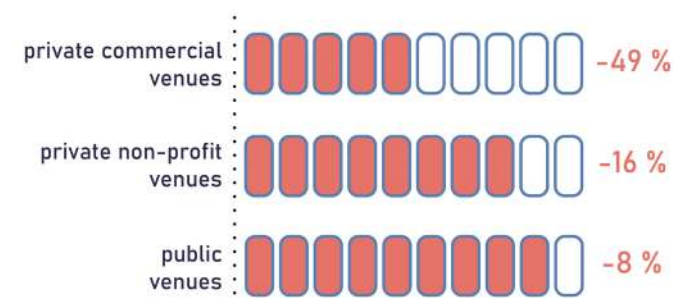
DECLINE ON TOTAL EXPENDITURE 2019 COMPARED TO 2020



DECLINE ON PROGRAMME COSTS 2019 COMPARED TO 2020



DECLINE ON EMPLOYMENT COSTS 2019 COMPARED TO 2020



LEGEND CLUB MILANO (IT)

*Portrait of medium-sized private commercial venue
Interview with Filippo Puliafito (artistic director)*



© Nadia Camilleri

CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

The Legend Club Milano is a music venue surrounded in one of Milano's parks: Parco Nord. Its maximum capacity is of 400 people and the main activity is live music.

WHAT ACHIEVEMENTS OF YOUR VENUE/CLUB ARE YOU MOST PROUD OF?

The achievement of which we are mostly proud is having created relations with international artists and booking agencies even if Legend Club has not a particularly high capacity. This happened thanks to the audio quality and the uniqueness of the location.

LOOKING BACK AT THE COVID PANDEMIC, WHAT IMPACTED YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR) THE MOST IN THAT PERIOD?

Our main activity is live music: having a complete ban for a long time it has been particularly tough not only looking at the economical point of view but also psychologically and emotionally.

NOW IN EARLY 2023, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

As soon as live music activities started again, we saw a growth in number of events and participation: now the situation looks better. For us and our activity one important strength is the fact that we are programming important international bands.

LOOKING AT THE NEAR FUTURE, WHAT ARE THE MOST IMPORTANT CHALLENGES FOR YOUR VENUE (OR THE LIVE MUSIC SECTOR)?

Right now we are working on containing energy expenditures, since there has been a rise on costs. For our future, we would like to develop a lightning system with even more quality an impact to create a more unique sensation to the audience that comes to see our shows. At the moment we are pretty satisfied with the audio system, that is considered on of the best in the area.

WHAT CAN WE EXPECT IN THE FUTURE OF YOUR VENUE/CLUB?

We aim to keep this growing trend and increase the number of important musicians that we host in our venue.

LA VAPEUR, DIJON (FR)

*Portrait of large public venue
Interview with Yann Rivoal (director/booker)*



© Mathilde Leconte

CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

« La Vapeur » is a public institution of the city of Dijon (France). It includes two concert halls (1200 and 230 capacity), six rehearsal and creation studios, a digital music recording studio, a workshops area, and a restaurant. “La Vapeur”’s project includes schools’ partnerships and specific projects with social and medical sectors. “La Vapeur” also supports amateur practice, the development of local artists and professional creation. “La Vapeur” is committed to a corporate social responsibility (CSR) approach and is particularly attentive to the reduction of its ecological footprint, but also to the accessibility of all its activities to all.

WHAT ACHIEVEMENTS OF YOUR VENUE/CLUB ARE YOU MOST PROUD OF?

For more than 10 years we have been working to have a modern and efficient facility with a committed team to implement and develop a cultural project that positions popular music and its diversity in a prominent place in our city and our region. This translates into good working conditions for the artists and all the teams, and good conditions for welcoming, listening to and practicing for the populations. It also takes the form of collective musical practices in schools and artists’ participation in all the region.

LOOKING BACK AT THE COVID PANDEMIC, WHAT IMPACTED YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR) THE MOST IN THAT PERIOD?

We were prevented from welcoming the public audience for many months. Fortunately, our public partners continued to fund us and we were able to support the artists in their work and reach out to populations. But the recovery was long and difficult and the management of the teams and finances complicated.

NOW IN EARLY 2023, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

Since the beginning of 2023, we do not hear about COVID anymore and we feel that the audience is returning to cultural events, and ticket sales are getting better. But inflation and the related rise in salaries, combined with a lack of support from some of our public partners, are causing a budgetary strain that has never been seen before. This has led to reducing the number of concerts and limit risks in the artistic programming.

LOOKING AT THE NEAR FUTURE, WHAT ARE THE MOST IMPORTANT CHALLENGES FOR YOUR VENUE (OR THE LIVE MUSIC SECTOR)?

The most important challenge for us nowadays is putting culture in the public and political debate, obtaining additional resources from local authorities and the State at a time when public finances are flagging, adapting our practices, including audience and artists services, to deal with the climate emergency, resisting the concentration and financialization of music in order to continue to promote diversity and emergence, and moving rapidly towards more inclusive, egalitarian and safer ways of doing our work.

COVID SUPPORT FUND

Although private commercial venues were hit the hardest by the pandemic restrictions, these types of venues received less COVID support fund from governments than non-profit venues. This is probably because of the existing relationships and dialogue between non-profit venues and (local) governments, and the recognition for these venues as being important cultural infrastructure that needs to be protected.

COVID support fund from governments was mainly available and with the purpose to cover fixed costs that venues were committed to, such as housing costs and wages of employees, to avoid loss of jobs and bankruptcies. There was hardly any support money available to cover artists' fees for cancelled shows, for freelancers that could not be offered any work anymore, or for suppliers in the industry depending on live music events. This negatively affected the whole live music ecosystem.

**WHICH PART OF THE LOST INCOME (2020 COMPARED TO 2019)
OF MUSIC VENUES AND CLUBS WAS COVERED BY COVID SUPPORT FUND
FROM GOVERNMENTS?**

PUBLIC

11%

**PRIVATE
NON-PROFIT**

29%

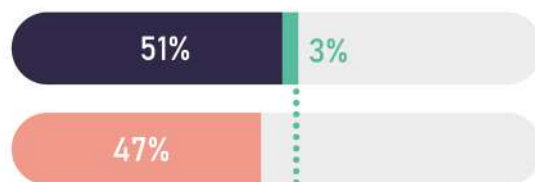
**PRIVATE
COMMERCIAL**

6%



Dance Atelier – Musicbox, Lisbon (Portugal) - 2021 © Ana Viotti

PUBLIC STRUCTURES

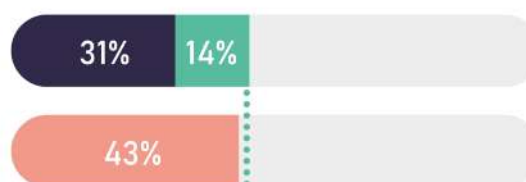


In the case of **public** venues **51%** of their **income** in 2019 was **subsidy**, while their **employment and housing costs** formed together **47%** of their **total expenditure** in 2019. This meant that most public venues could still cover their fixed costs in 2020 with regular subsidies and needed a relatively low amount of COVID support fund to end the year without a negative financial result.

Governments **compensating 11%** of the **lost income** of public venues in 2020 (compared to income in 2019) was enough for these venues to survive the first pandemic year at least financially. In this study and within Live DMA, a very large part of the public venues is based in France. With the extra money, they were able to continue some artistic activities such as residencies.



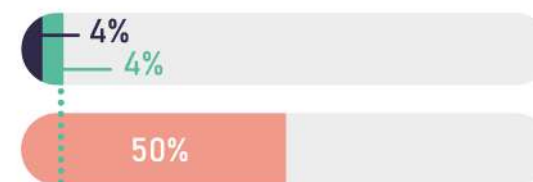
PRIVATE NON-PROFIT STRUCTURES



For **private non-profit** venues **29%** of the **lost income was compensated by COVID support** money and for most venues this was enough to end the year without negative financial results. Still, some venues were forced into reorganisations, which meant they had to do cutbacks and end contracts with permanent workers. A significant amount of people at private non-profit venues and clubs lost their job and income. These venues had a lower share of regular **subsidies (31%** in 2019) than public venues, while their **employment and housing costs** formed together **43%** of the **total expenditure** in 2019. Especially the larger private non-profit venues are depending more on audience spending money on tickets and drinks, and therefore needed more COVID support fund to end 2020 without financial losses.

The numbers are based mainly on the Live DMA members with a high share of private non-profit members, mostly venues in Belgium, The Netherlands, France, Switzerland.

PRIVATE COMMERCIAL STRUCTURES



For **private commercial** venues only **6%** of the **lost income was compensated by COVID support** money, despite the fact they clearly needed the support the most. In 2019 only **4%** of their **income** was **subsidy** (for many venues 0%), while their **housing and employment costs** formed at least **50%** of their **total expenditure**. Many private commercial venues therefore ended up with negative financial results in 2020, in some cases able to use own financial reserves, but often creating financial debts, and some venues even had to close permanently.

Live DMA members with a high share of private commercial venues, are venue associations in Italy, Spain, Portugal, Germany, Estonia, Sweden, and Finland. The worst decline of events and income we see for venues in Italy.

Although the COVID-support money was sufficient for many venues in many countries to survive the first pandemic year and end 2020 without a negative financial result, also many venues did end with financial losses, had to use their own financial reserves, and were forced to do reorganisations and let go of permanent paid workers. Apart from the finance almost all venues experienced huge damage to their main activities, workers, organisations, and other actors in the live music scenes.

In 2020, as an immediate response to the pandemic crisis the EU institutions adopted a rescue package with the Recovery and Resilience Facility (RRF). Channelled to EU Member States between 2021 and 2026 to better cope with the pandemic effects and make European economies and societies more sustainable, resilient and better equipped for the green and digital transitions. The European cultural and creative sectors, backed by the European Parliament, called to specifically earmark at the very least 2% of each NRRP for culture. Half of the Member States did include culture

in their NRRPs, with quite strong variations from one country to another. It remains unclear and uncertain how the live music scenes actually benefited from this envelop as live music venues are not always included in national cultural funding programmes.

In addition of the COVID support fund from governments, some venues received small amount of support money from private foundations, companies, and private persons. Some venues and clubs initiated crowdfunding campaigns, and asked holders of tickets for cancelled shows not to ask for a ticket refund but instead donate the money to the venue and/or artist.

Even before crises like COVID and inflation, the financial situation of the live music venues and clubs was already fragile as they are very dependent on audience's spendings, subsidies, volunteer work, and rules and regulations to survive. In many cities across Europe external factors such as gentrification, noise regulations, neighbours' complaints and increasing costs tend to further weaken this fragile situation.

LIVE DMA MEMBER (REGION)	WHICH PART OF THE LOST INCOME (2020 COMPARED TO 2019) OF MUSIC VENUES AND CLUBS WAS COVERED BY COVID SUPPORT FUND FROM GOVERNMENTS? *
KeepOn Live (Italy)	3%
Clubcircuit (Flanders, Belgium)	3%
ASACC (Catalonia)	4%
LiveFIN (Finland)	13%
FEDELIMA (France)	14%
ACCES (Spain, excl Catalonia and Basque Country)	15%
Court-Circuit (Wallonia, Belgium)	25%
VNPF (The Netherlands)	32%
PETZI (Switzerland)	57%

**For venues and clubs part of Live DMA members in regions in Belgium, Spain and Italy the COVID support fund for employees' wages was often directly distributed to the employees by governments and trade unions, and therefore not part of the income and expenditure of the venues. This can explain a lower percentage of lost income covered by support fund for venues and clubs in these regions.*

SALA MARDI GRAS, A CORUÑA (ES)

*Portrait of small private commercial venue
Interview with Tomi Legido (director)*



© Yoshimura Ramon

CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

Sala Mardi Gras is located in A Coruña, just in the northwest corner of Spain. It's a small venue with 130 capacity. We program all kinds of music, but the main acts are rock in the wide meaning of the word. We also have DJs on weekend nights with free entrance from 1 to 5:30. One of our projects is "Elas Son Artistas" with several artistic expressions with women leading the show.

WHAT ACHIEVEMENTS OF YOUR VENUE/CLUB ARE YOU MOST PROUD OF?

We won the Best Venue Award in 2021, after three nominations in the past, in the Galician Musica Awards Martin Codax. We were born in 1999 and we are very proud of our team across the years and with "the family" growing along with us. We know the name of a great number of Mardi Gras' fans.

LOOKING BACK AT THE COVID PANDEMIC, WHAT IMPACTED YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR) THE MOST IN THAT PERIOD?

We survived. During that period we created a non-profit association to help the city venues with money. It's still alive and it's called Mardi Gras Musical Republic (in Spanish).

NOW IN EARLY 2023, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

No, we only reduce the capacity a little trying to send a message: You are safe here, it's a great place to feel the live music. Don't worry about COVID or things like that.

LOOKING AT THE NEAR FUTURE, WHAT ARE THE MOST IMPORTANT CHALLENGES FOR YOUR VENUE (OR THE LIVE MUSIC SECTOR)?

Fight against Netflix (and another platforms) and get an important group of new clients because our people from the beginning are getting older.

WHAT CAN WE EXPECT IN THE FUTURE OF YOUR VENUE/CLUB?

Great shows every night, with established artists and new ones, good people around you and a kind and big smile every time you pay your ticket to enjoy live music and DJ-sets.

EKKO, UTRECHT (NL)

*Portrait of small private non-profit venue
Interview with Marlies Timmermans (director)*



CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

EKKO is a small venue in Utrecht, The Netherlands, a talent stage with a 350 audience capacity. Last year we've celebrated our 35th anniversary. When it comes to live music and club nights, EKKO presents a relevant programme in which current trends resonate and are pushed forward. A vast array of live performers and dj's come and play EKKO throughout the year: from indie folk to hiphop, from electronic music to black metal.

WHAT ACHIEVEMENTS OF YOUR VENUE/CLUB ARE YOU MOST PROUD OF?

EKKO is being led by a dedicated group of employees of which a significant part is working on a voluntary basis. Our volunteers provide input to EKKO's identity and image bottom-up on a social, cultural, and professional level.

LOOKING BACK AT THE COVID PANDEMIC, WHAT IMPACTED YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR) THE MOST IN THAT PERIOD?

It was quite a process for our team. Unfortunately, we had to stop the activities for employees and volunteers at a certain point, and that was tough because that's the core of EKKO. But in terms of programming, it also brought us some time to reflect on, and sharpen our policy, where before there was not really time to do this, because 'the show must go on'.

NOW IN EARLY 2023, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

We are back regarding the amount of programming, but unfortunately not yet fully up to speed with an almost completely new team on the work floor. In terms of programming, the first year after the pandemic we presented more national artists, but this is now changing again towards a different balance. The biggest change is in our night programming, where we started to programme horizontally with a very clear structure for the public. A number of new concepts have also been added to the night programme.

LOOKING AT THE NEAR FUTURE, WHAT ARE THE MOST IMPORTANT CHALLENGES FOR YOUR VENUE (OR THE LIVE MUSIC SECTOR)?

First of all the increased inflation, for sure. Also, like other music venues, we focus on themes in the field of sustainability, fair pay, and diversity & inclusion.

WHAT CAN WE EXPECT IN THE FUTURE OF YOUR VENUE/CLUB?

EKKO will always strive to be a stepping-stone for live acts, dj's and organisers that you will later see in larger venues, clubs and festivals in Utrecht and the rest of The Netherlands.

VIEW OF 2021, 2022 & 2023

VIEW OF 2021

While in 2020 the venues and clubs could still operate normally until March of that year, in 2021 the whole year was dominated by pandemic restrictions imposed by governments. The venues data 2021 that we have collected from Live DMA members so far, show in general a comparable image of 2020, but also show some diversity. In some regions (France, Finland) there was a small increase of music events, artist performances and audience visits in 2021 compared to 2020. In other regions we see a small decrease, for example for the Dutch music venues part of VNPF in The Netherlands ³.

3. [Dutch Music Venues and Festivals – Facts and Figures 2021](#) (November 2022)



Twin Toes - Botanique, Bruxelles (Belgium) - 2021 © Van's Ography

VIEW OF 2022 AND 2023

In the first quarter of 2022 venues and clubs in most European countries were still in lockdown or still facing many pandemic restrictions. From March 2022 venues and clubs could finally reopen without restrictions. In the next months many rescheduled concerts from 2020 and 2021 took place in the venues, as well as new tours of upcoming artists, and club nights for audiences that could finally go out and dance after two years. With the high amount of established and new artists wanting to perform (again), plus more competition from other leisure activities, venues and clubs were challenged to win back audiences.

During 2022 another huge problem for music venues and clubs across Europe came to the horizon, when inflation increased, and costs for venues kept rising. Especially energy costs increased enormously, but also other expenditure, such as employment costs, food and beverage purchase, and programme costs. On the other hand, there was no more income for venues since subsidies were not indexed in line with rising costs, and audiences had no more money to spend. This led to more financial problems and negative results for venues and clubs in 2022, with a uncertain outlook for 2023.

For more information about current challenges for live music venues and clubs we refer to the latest Live DMA report '[Post COVID-19 Challenges in the Live Music Scenes Across Europe](#)' (January 2023).

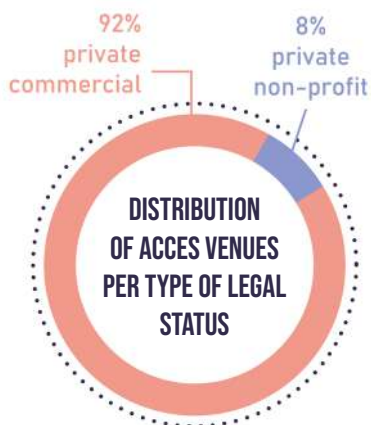
Members' figures



2019 OVERVIEW ACCES VENUES & CLUBS (SPAIN)

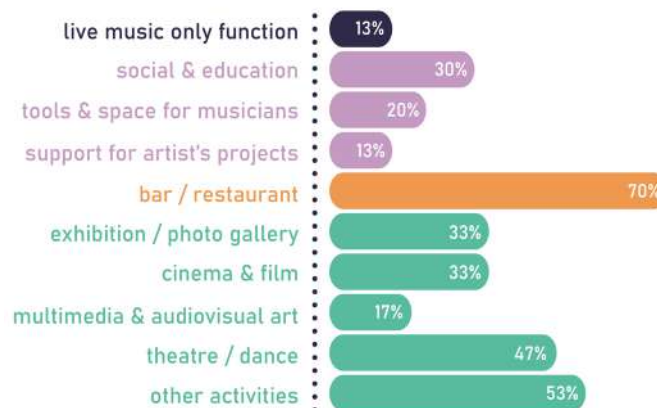
These figures represent 115 live music venues and clubs in Spain (excluding regions Catalonia and Basque Country) which are part of the association ACCES.

Based on data (year 2019) of 30 ACCES music venues, collected during 2020-2022, and extrapolated to data of 115 ACCES venues.



Most ACCES venues are **private commercial (92%) structures**.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, ACCES music venues had a **median audience capacity of 203**.

The ACCES music venues presented well over **21,000 artists performances**, which attracted almost **4 million visits**.

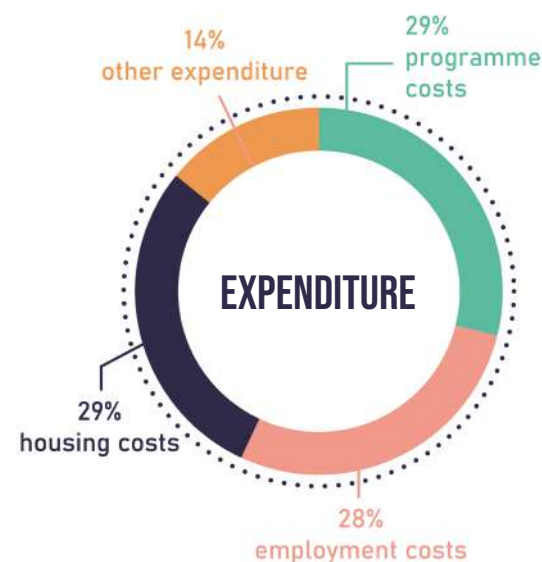
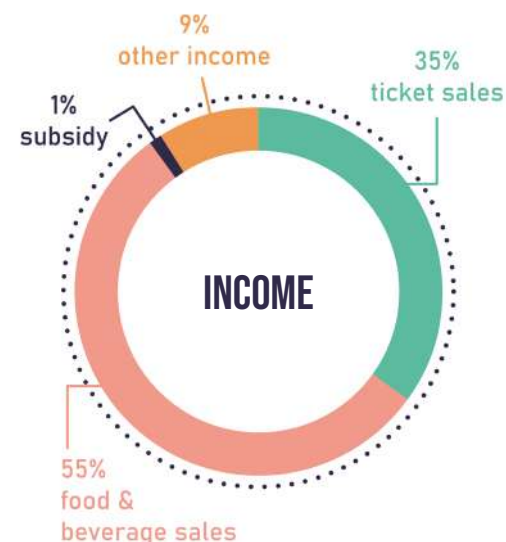
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

50% of all ACCES music venues also **organised festivals** in 2019.

WORKFORCE IN ACCES LIVE MUSIC VENUES AND CLUBS



Almost **2,000 workers** were involved in the ACCES music venues, of which **95% were paid workers**. In total **94%** of all the working hours (FTE) **was paid**. The share of volunteers was very low (1%). **38%** of the workers was assigned with **gender female**.



ACCES music venues had a **total income** of well over **34 million euro**. **Subsidy** was only **1%** of the total income of all venues. The venues generated most income from **ticket sales (35%)** and **food & beverage sales (55%)**.



2020 OVERVIEW ACCES VENUES & CLUBS (SPAIN)

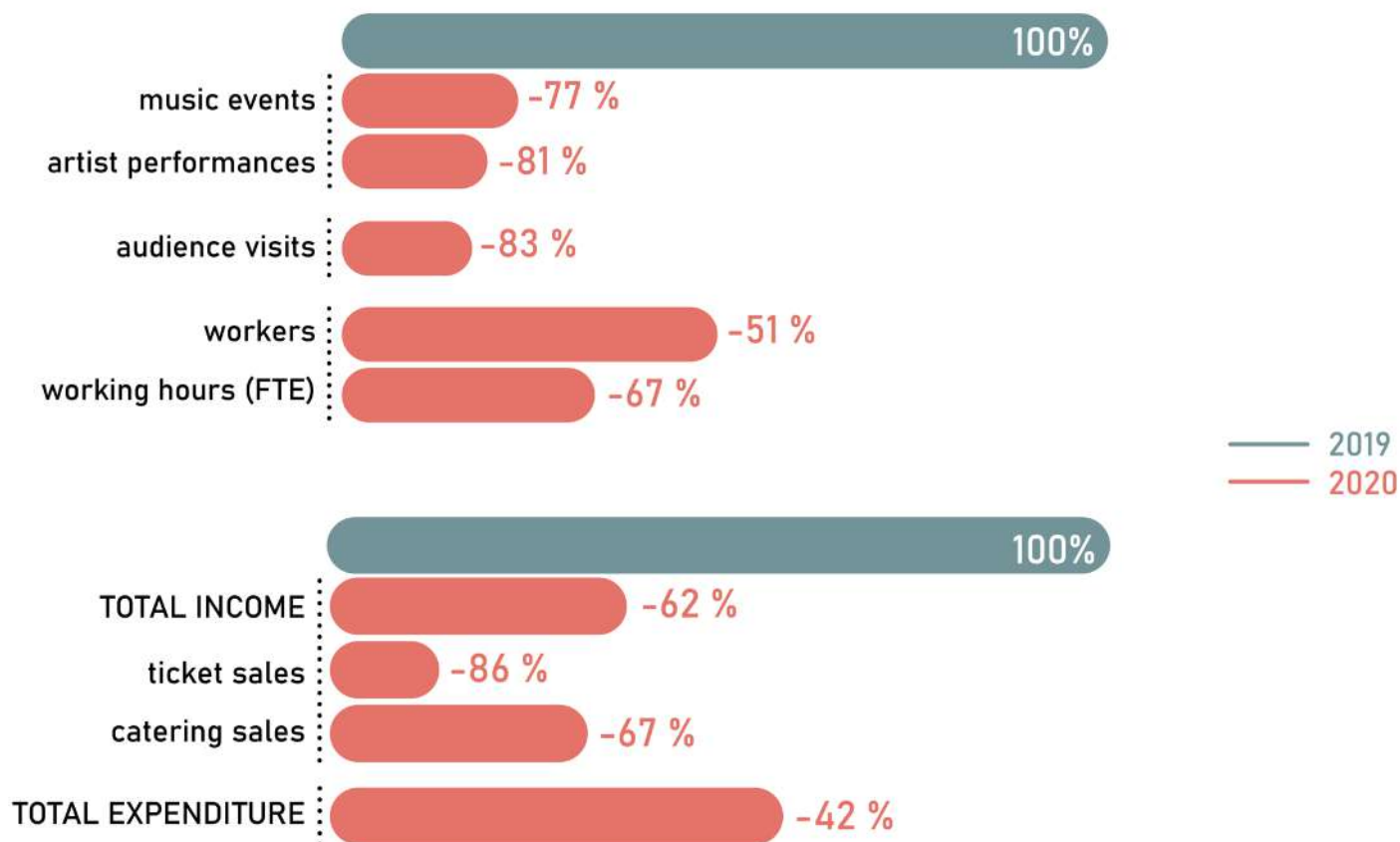
Based on compared data (year 2019+2020) of 11 ACCES music venues, collected during 2020-2022.

To learn more about these venues visit salasdeconciertos.com and/or contact ACCES Survey coordinator Elda Gómez: elda.gomez@salasdeconciertos.com

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues.

The government provided COVID support fund to the ACCES venues in 2020, but this **covered only 15% of the lost income** (2020 compared to 2019) of the music venues. In addition the Spanish government paid COVID support fund for employees' wages directly to part of the workforce of the ACCES venues.



2019 OVERVIEW ASACC VENUES & CLUBS (CATALONIA)

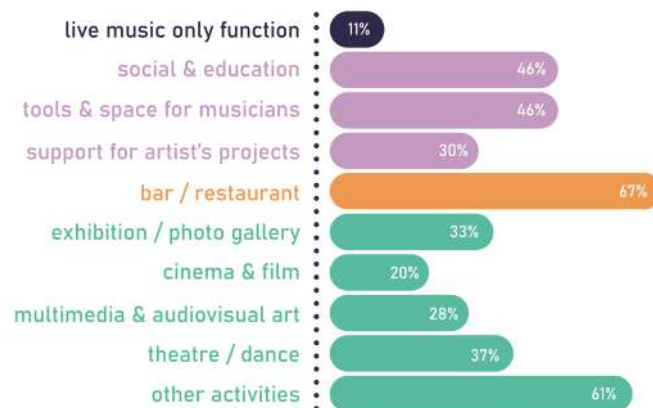
These figures represent 76 live music venues and clubs in the region Catalonia in Spain, which are part of the association ASACC.

Based on data (year 2019) of 46 ASACC music venues, collected during 2020-2022, and extrapolated to data of 76 ASACC venues.



Most ASACC venues are **private commercial (90%) structures**.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, the ASACC music venues had a **median audience capacity of 175**.

The venues presented well over **17,000 artist performances**, which attracted well over **4.2 million visits**.

The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

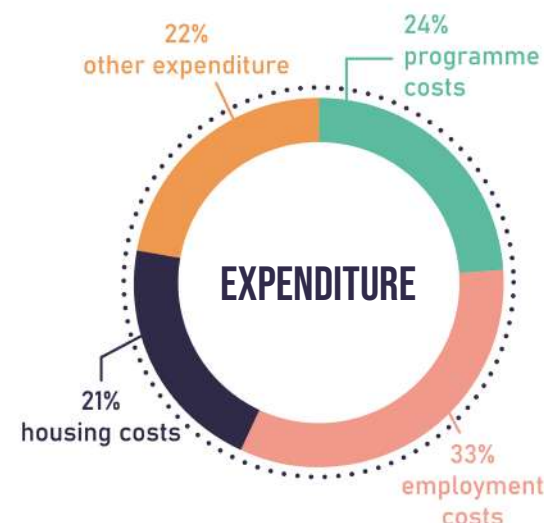
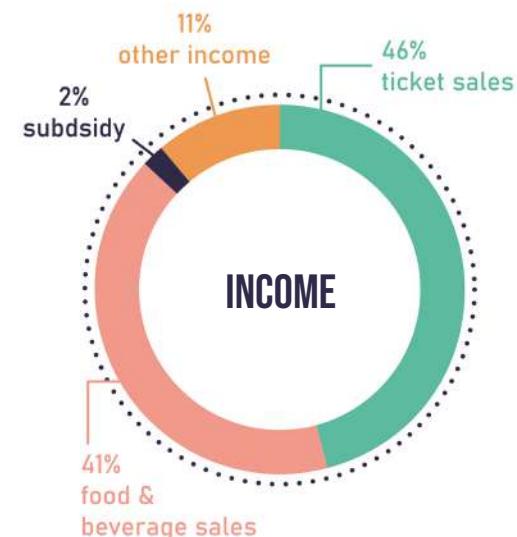
46% of all ASACC music venues also **organised festivals** in 2019.

WORKFORCE IN ASACC LIVE MUSIC VENUES AND CLUBS



Around **1,600 workers** were involved in the ASACC music venues in 2019, of which **88% paid workers** and **7% volunteers**.

43% of the workers was assigned with gender female.



In 2019 the ASACC music venues had a **total income** of well over **73 million euro**. **Subsidy** was only **2%** of the total income of all venues. The venues generated most income from **ticket sales (46%)** and **food & beverage sales (41%)**.

2020 OVERVIEW ASACC VENUES & CLUBS (CATALONIA)

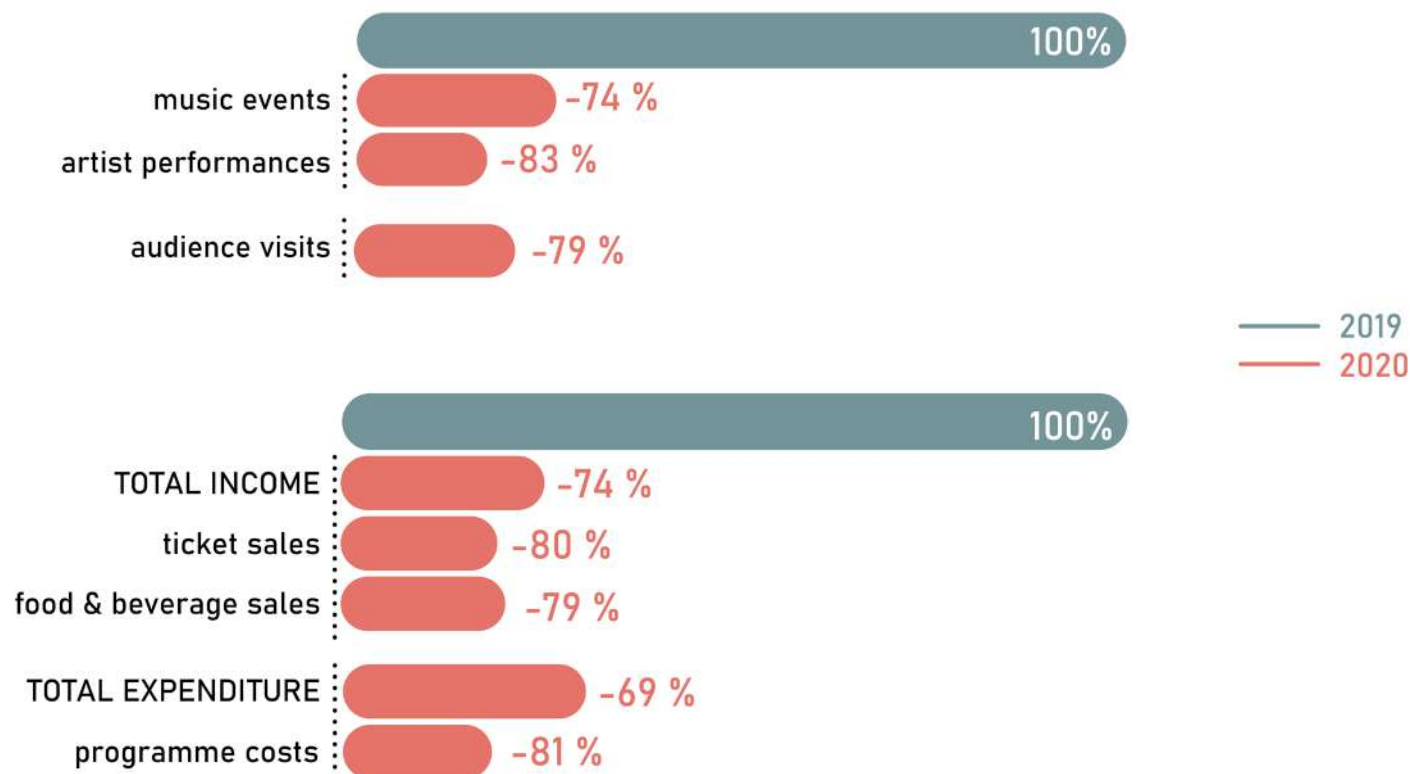
Based on compared data (year 2019+2020) of 29 ASACC music venues, collected during 2020-2022.

To learn more about these venues visit www.infoconcerts.cat and/or contact ASACC Survey Coordinator Adriana Alcover, adriana@asacc.net

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues in Catalonia.

The government provided COVID support fund to the ASACC venues in 2020, but this **covered only 4% of the lost income** (2020 compared to 2019) of the music venues. In addition the Catalanian government paid COVID support fund for employees' wages directly to part of the workforce of the ASACC venues.

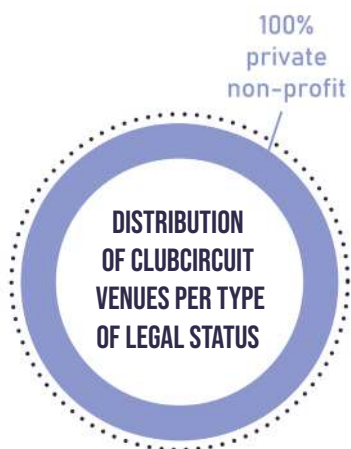




2020 OVERVIEW CLUBCIRCUIT VENUES & CLUBS (FLANDERS, BELGIUM)

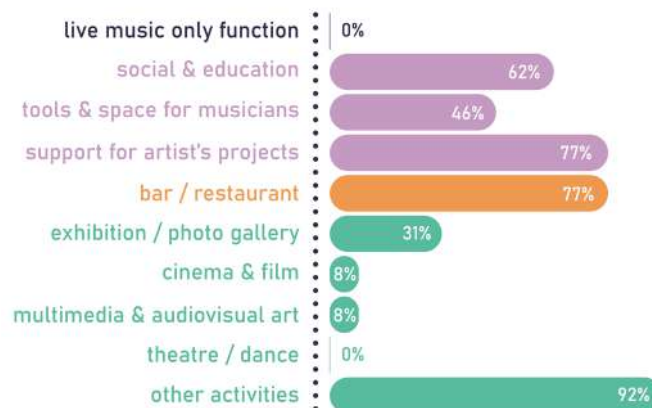
These figures represent 13 live music venues and clubs in Flanders (the Dutch speaking part of Belgium), which are part of the association Clubcircuit.

Based on data (year 2019) of 13 Clubcircuit music venues, collected during 2020-2022, and extrapolated to data of 13 Clubcircuit venues.



All Clubcircuit venues are **private non-profit structures (100%)**.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, Clubcircuit music venues had a **median audience capacity of 600**.

The network's venues presented almost **2,700 artist performances**, which attracted well over **450,000 visits**.

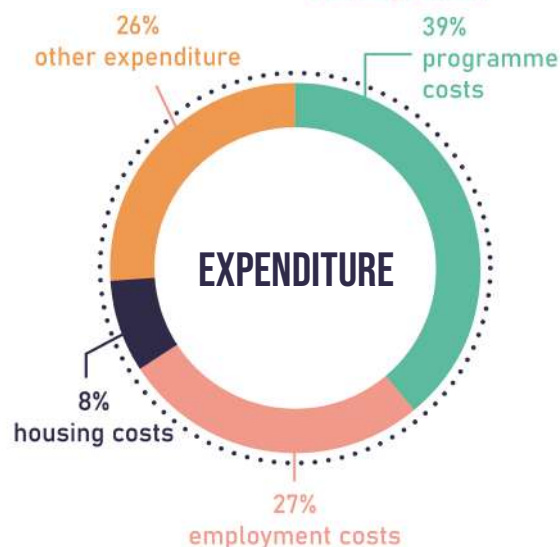
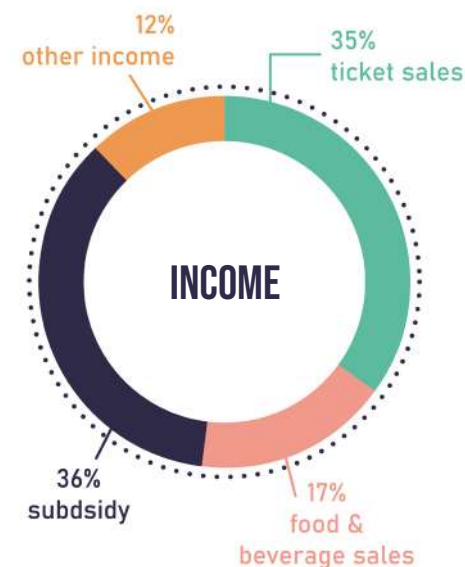
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

85% of all Clubcircuit music venues also **organised festivals** in 2019.

WORKFORCE IN CLUBCIRCUIT LIVE MUSIC VENUES AND CLUBS



Over **3,200 workers** were involved in the Clubcircuit music venues in 2019, of which **14% paid workers** and **81% volunteers**. In total **66% of all working hours (FTE)** was paid. **30%** of the workers was assigned with **gender female**.



In 2019 the Clubcircuit music venues had a **total income** of well over **18 million euro**. **Subsidy** was **36%** of the total income of all venues. The venues generated most income from **ticket sales (35%)** and **food & beverage sales (17%)**.



2020 OVERVIEW CLUBCIRCUIT VENUES & CLUBS (FLANDERS, BELGIUM)

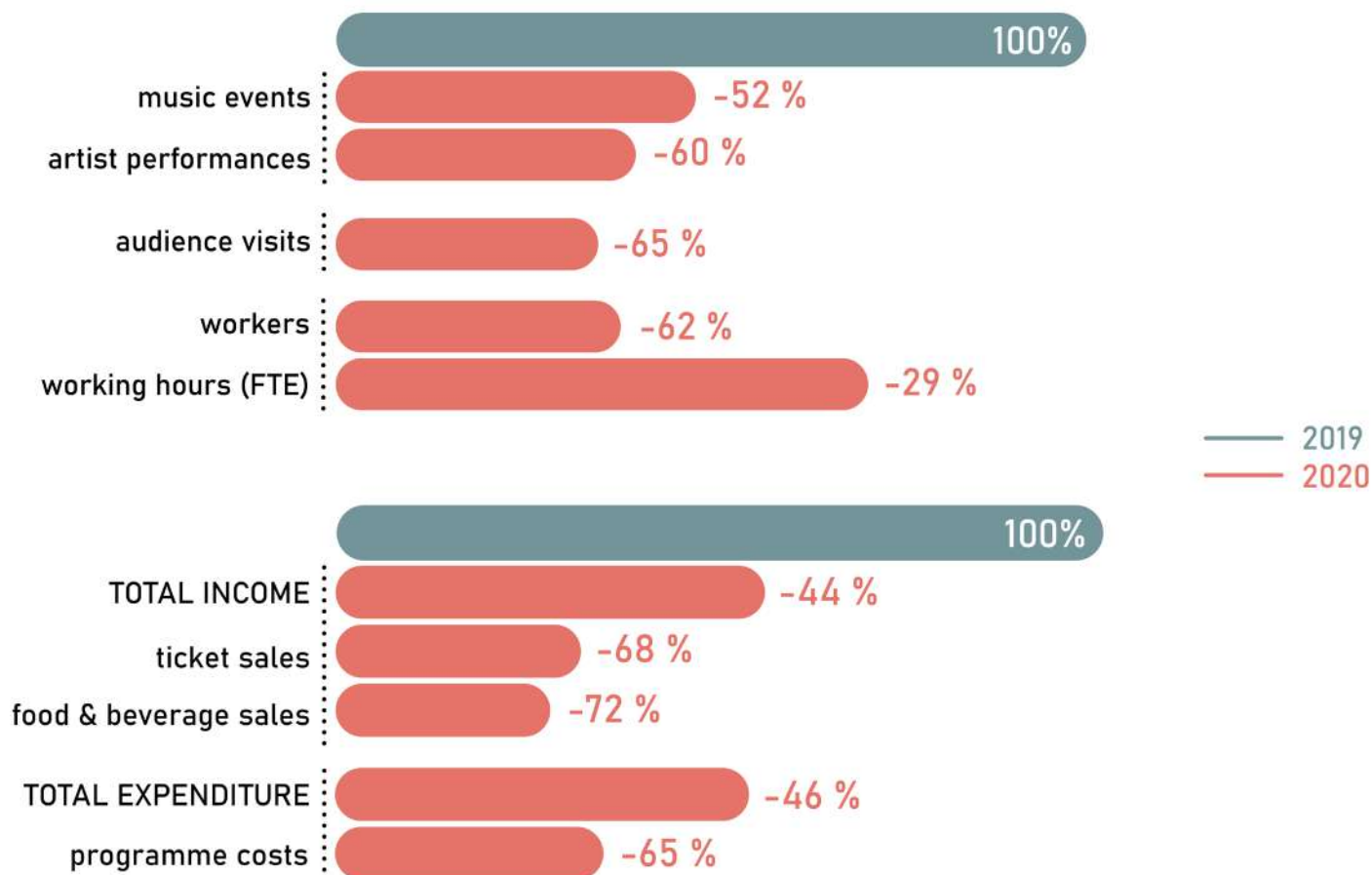
Based on compared data (year 2019+2020) of 11 Clubcircuit music venues, collected during 2020-2022.

To learn more about these venues visit clubcircuit.be and/or contact Clubcircuit Survey coordinator Marc Steens, info@clubcircuit.be

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues in Belgium.

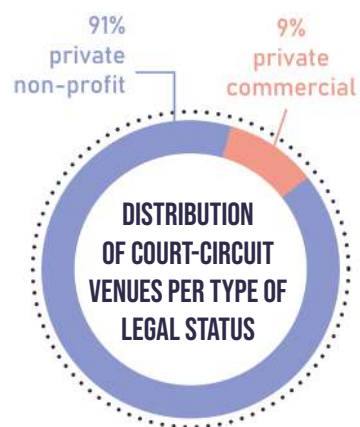
The government provided COVID support fund to the Clubcircuit venues in 2020, which **covered only 3% of the lost income** (2020 compared to 2019) of the music venues. In addition, the government and trade unions paid COVID support fund for employees' wages directly to part of the workforce of the Clubcircuit venues.



2019 OVERVIEW COURT-CIRCUIT VENUES & CLUBS (WALLONIA, BELGIUM)

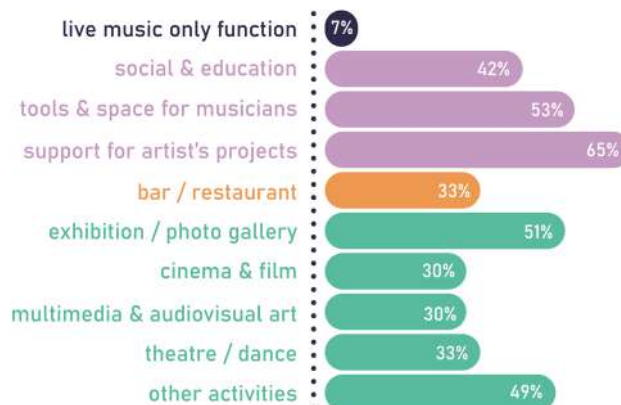
These figures represent 43 live music venues and clubs in Wallonia (the French speaking part of Belgium), which are part of the association Court-Circuit.

Based on data (year 2019) of 43 Court-Circuit music venues, collected during 2020-2021.



Almost all Court-Circuit venues are **private non-profit structures** (91%).

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, Court-Circuit music venues had a **median audience capacity of 220**.

The music venues presented well over **4,500 artist performances**, which attracted well over **300,000 visits**.

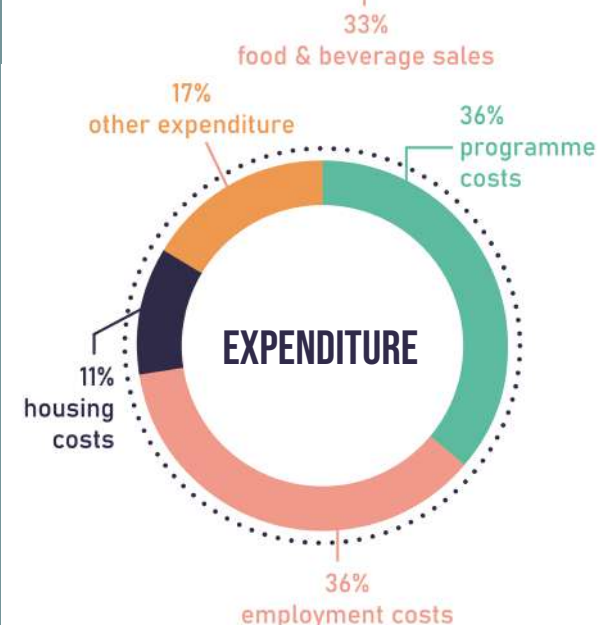
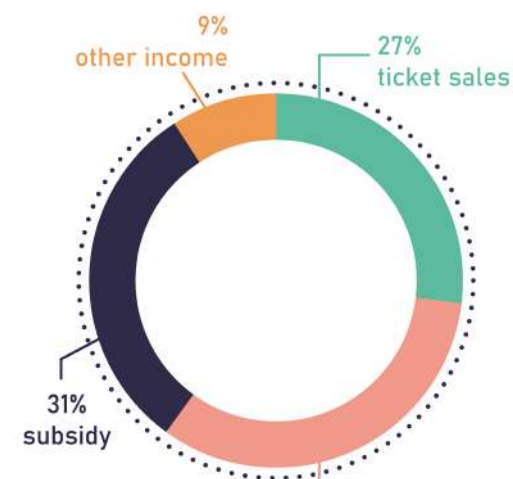
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities. **74%** of all Court-Circuit music venues also **organised festivals** in 2019.

WORKFORCE IN COURT-CIRCUIT LIVE MUSIC VENUES AND CLUBS



Over **1,200 workers** were involved in the Court-Circuit music venues in 2019, of which **14% paid workers** and **80% volunteers**. In total **34% of all working hours (FTE) was paid**.

35% of the workers was assigned with **gender female**.



In 2019 the Court-Circuit music venues had a **total income of 6 million euro**. **Subsidy** was **25%** of the total income of all venues. The venues generated most income from **ticket sales (36%)** and **food & beverage sales (22%)**.

2020 OVERVIEW COURT-CIRCUIT VENUES & CLUBS (WALLONIA, BELGIUM)

Based on compared data (year 2019+2020) of 35 Court-Circuit music venues, collected during 2020-2022.

To learn more about these venues visit www.court-circuit.be and/or contact Court-Circuit Survey coordinator David Dehard, david@court-circuit.be



IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues in Belgium.

The government provided COVID support money to the Court-Circuit venues in 2020, which **covered 25% of the lost income** (2020 compared to 2019) of the music venues. In addition, the government and trade unions paid COVID support fund for employees' wages directly to part of the workforce of the Court-Circuit venues.



2019 OVERVIEW DANSK LIVE VENUES & CLUBS (DENMARK)

These figures represent 40 live music venues and clubs in Denmark which are part of the association Dansk Live (which is 45% of in total 88 venues part of Dansk Live).

Based on data (year 2019) of 40 Dansk Live music venues, collected during 2020-2021.

To learn more about these venues visit <http://dansklive.dk> and/or contact Dansk Live Survey coordinator Signe Hemmingsen, signe@dansklive.dk

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS

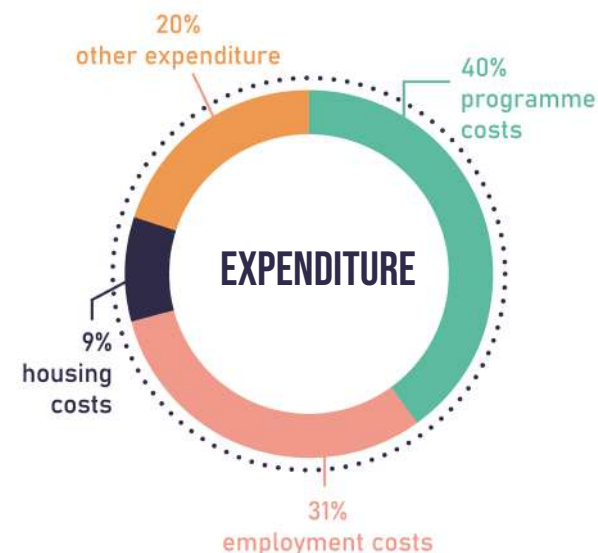
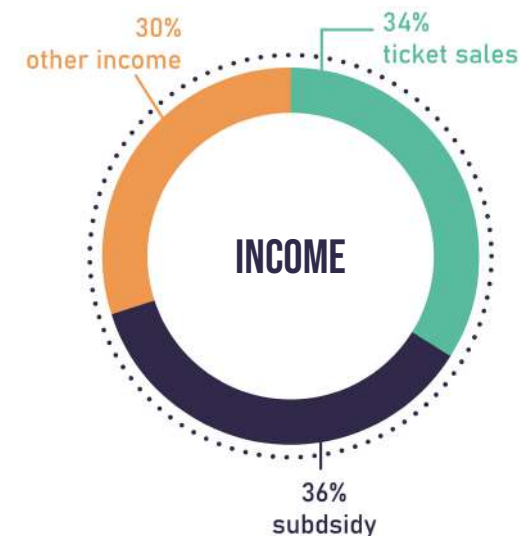
In 2019, the Dansk Live music venues presented an average of **134 music events per venue**.

In 2019, the Dansk Live music venues attracted an average of **15,129 paid visits** per venue, which is an average of 113 paying visitors per music event with an admission fee.

WORKFORCE IN DANSK LIVE LIVE MUSIC VENUES AND CLUBS



Dansk Live venues had an average of **18 paid employees** (median 9) and an average of **81 volunteers** (median 60), in 2019.



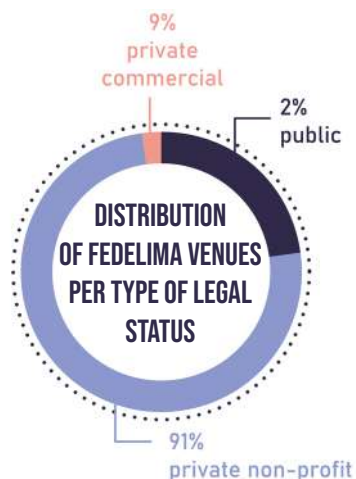
In 2019, the Dansk Live music venues had an average **income** of almost **900,000 euro**. **34%** of the income of Dansk Live venues in 2019 was generated by **ticket sales**, while **40%** of the total expenditure consisted of **programme costs**.



2020 OVERVIEW FEDELIMA VENUES & CLUBS (FRANCE)

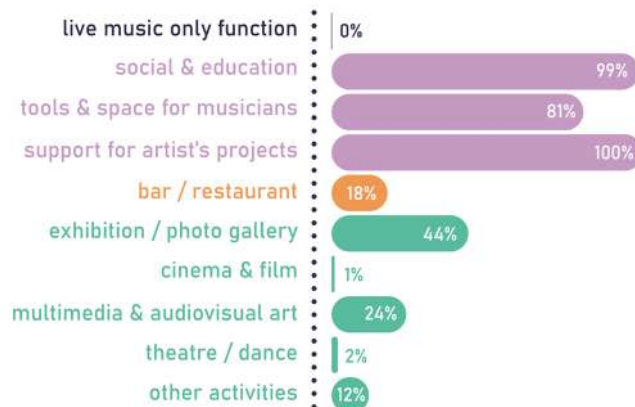
These figures represent 137 live music venues and clubs in France which are part of the association FEDELIMA.

Based on data (year 2019) of 103 FEDELIMA music venues, collected during 2020, and extrapolated to data of 137 FEDELIMA venues.



Most FEDELIMA venues are **private non-profit (75%)** structures.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, FEDELIMA music venues had a **median audience capacity of 500**.

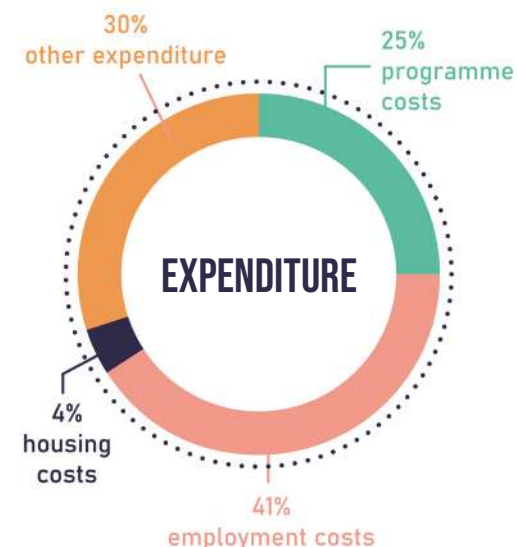
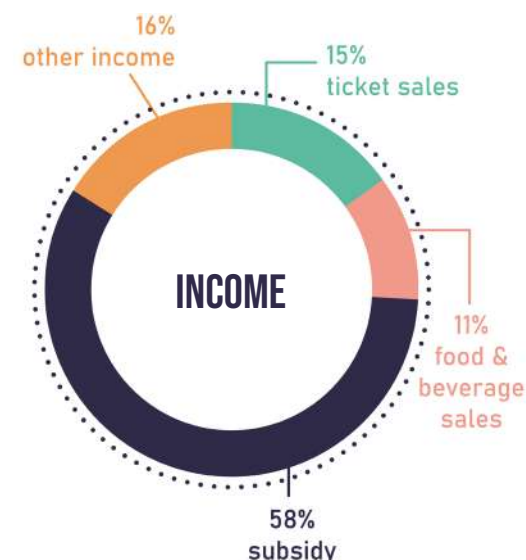
The music venues presented well over **17,000 artist performances**, which attracted almost **2.5 million visits**.

The venues were also involved in other functions than presenting live music, especially educational, social, and artistic activities, but also culinary and multi-disciplinary. **54%** of all FEDELIMA music venues also **organised festivals** in 2019.

WORKFORCE IN FEDELIMA LIVE MUSIC VENUES AND CLUBS



Almost **17,000 workers** were involved in the FEDELIMA music venues in 2019, of which **97% paid workers**. In total **93% of all the working hours (FTE) were paid**. On top, over **7,000 'French volunteers'** were involved in the venues, which by French law cannot be considered workers. **42%** of the workers was assigned with **gender female**.



In 2019 the FEDELIMA music venues had a **total income** of well over **162 million euro**. **Subsidy** was **58%** of the total income of all venues. The venues also generated income from **ticket sales (15%)** and **food & beverage sales (11%)**.



2020 OVERVIEW FEDELIMA VENUES & CLUBS (FRANCE)

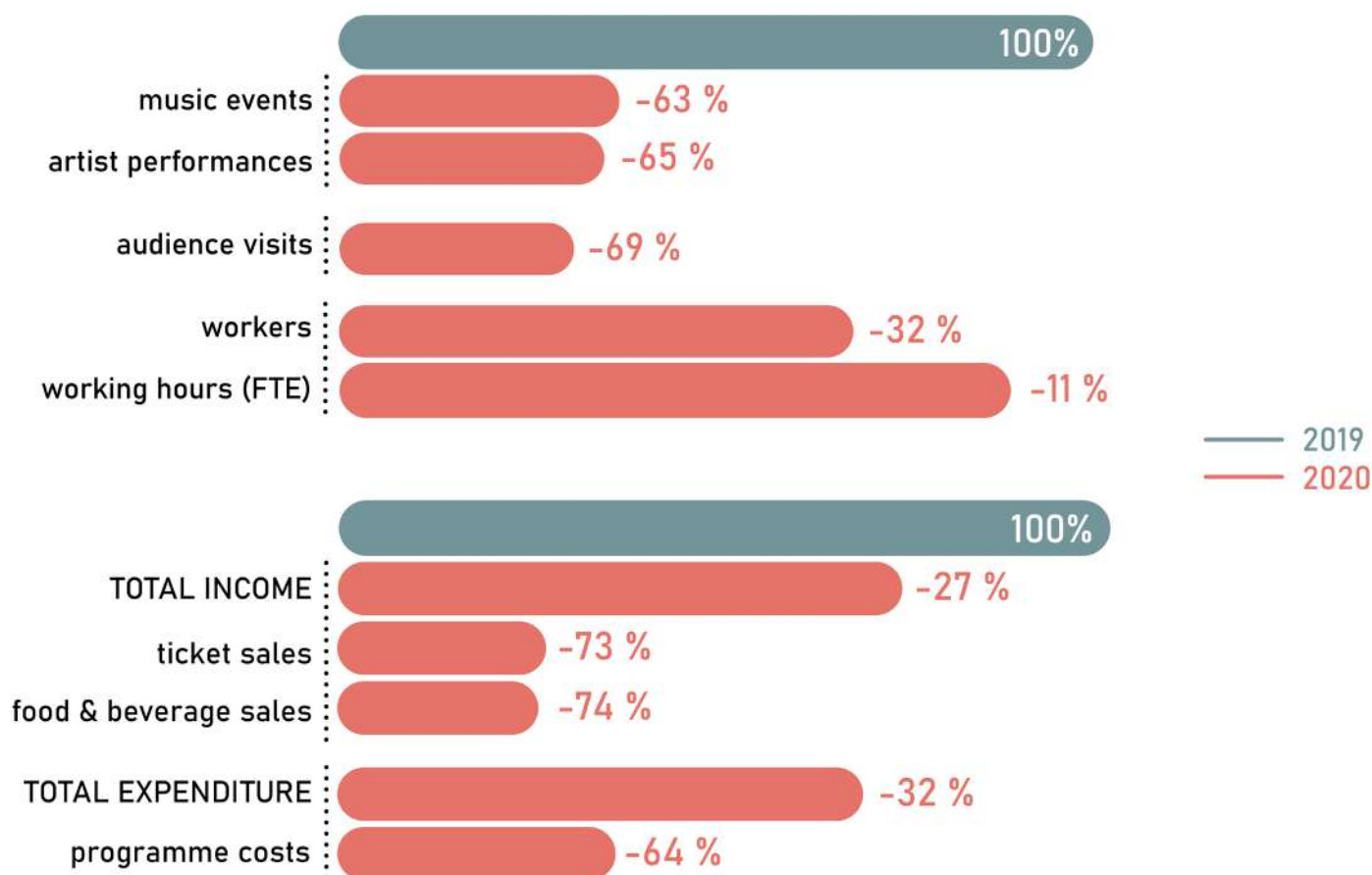
Based on compared data (year 2019+2020) of 95 FEDELIMA music venues, collected during 2020-2021, and extrapolated to data of 137 FEDELIMA venues.

For more information see latest FEDELIMA Survey [report](#) on their website and/or contact FEDELIMA Survey coordinator Hyacinthe Chataigné, hyacinthe.chataigne@fedelima.org

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues.

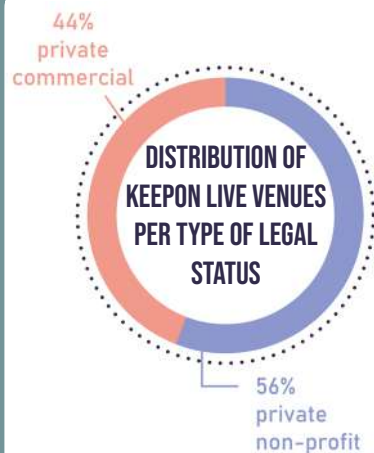
The government provided COVID support money to the FEDELIMA venues in 2020, but this **covered only 14% of the lost income** (2020 compared to 2019) of the music venues.



2019 OVERVIEW KEEPON LIVE VENUES & CLUBS (ITALY)

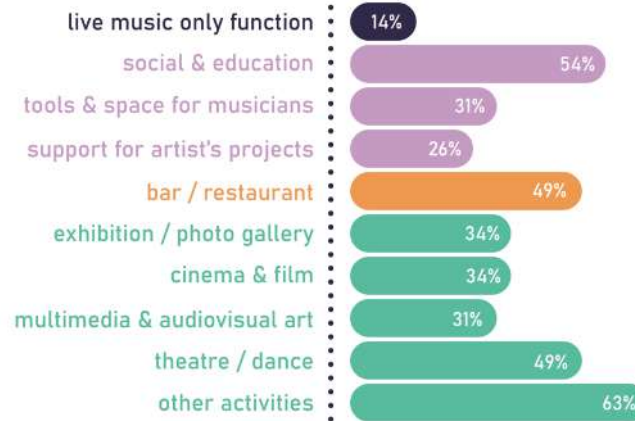
These figures represent 60 live music venues and clubs in Italy, which are part of the association Keep On Live.

Based on data (year 2019) of 35 Keep On Live music venues, collected during 2020-2022, and extrapolated to data of 60 KeepOn Live venues.



KeepOn Live venues are a mix of **private non-profit (56%)** and **private commercial structures (44%)**.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, KeepOn Live music venues had a **median audience capacity of 400**. The music venues presented almost **10,700 artist performances**, which attracted well over **3.3 million visits**.

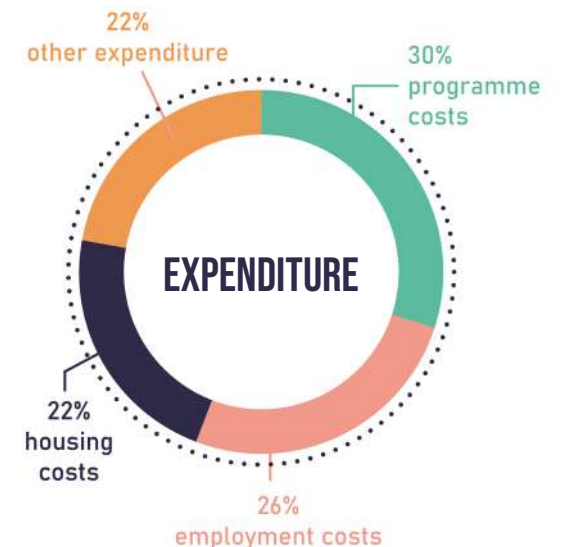
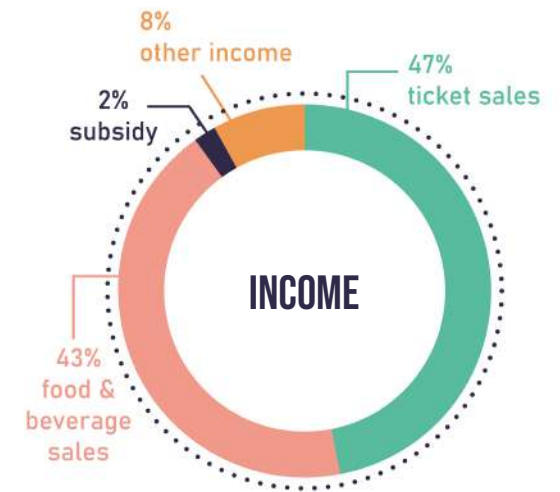
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities. **51%** of all KeepOn Live music venues also **organised festivals** in 2019.

WORKFORCE IN KEEPON LIVE LIVE MUSIC VENUES AND CLUBS



Over **1,900 workers** were involved in the KeepOn Live music venues in 2019, of which **83% paid workers** and **13% volunteers**. In total **79% of all working hours (FTE) was paid**.

36% of the workers was assigned as **gender female**.



In 2019 the KeepOn Live music venues had a **total income** of well over **37 million euro**. **Subsidy** was only **2%** of the total income of all venues. The venues generated most income from **ticket sales (47%)** and **food & beverage sales (43%)**.

2020 OVERVIEW KEEPON LIVE VENUES & CLUBS (ITALY)

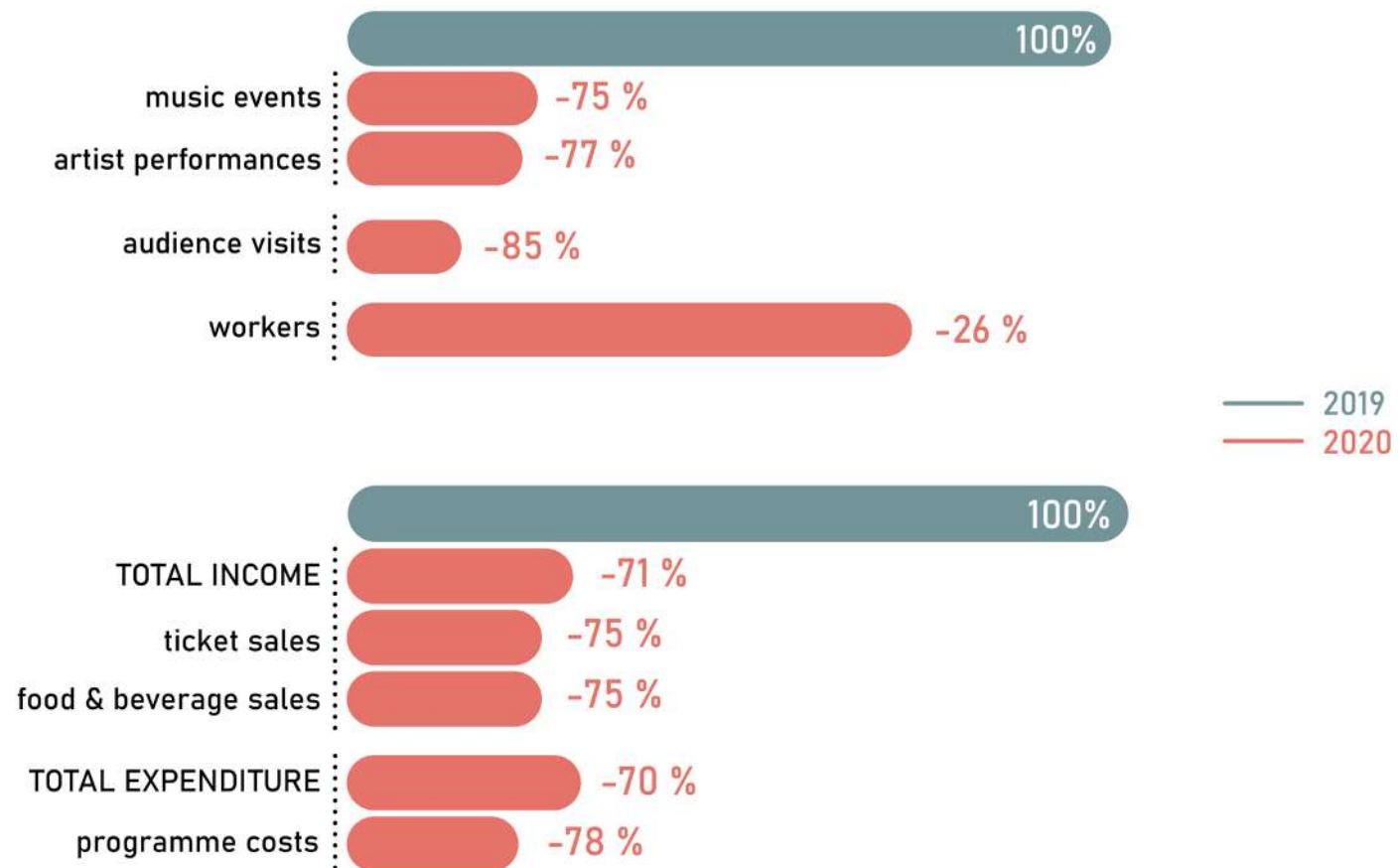
Based on compared data (year 2019+2020) of 10 Keep On Live music venues, collected during 2020-2022.

To learn more about these venues visit www.KeepOnLive.com and/or contact KeepOn Live Survey coordinator Gaiane Kevorkian, gaiane@KeepOnLive.com

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues in Italy.

The government provided COVID support money to the KeepOn Live venues in 2020, which **covered only 3% of the lost income** (2020 compared to 2019) of the music venues. In addition the Italian government paid COVID support fund for employees' wages directly to part of the workforce of the KeepOn Live venues.

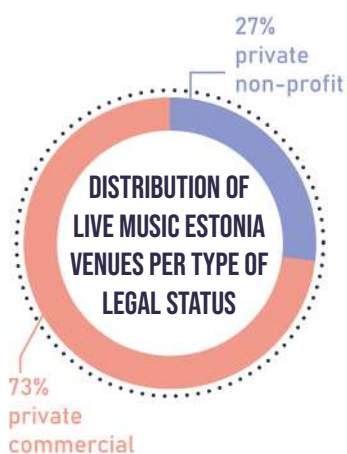


LIVE MUSIC ESTONIA

2019 OVERVIEW LIVE MUSIC ESTONIA VENUES & CLUBS (ESTONIA)

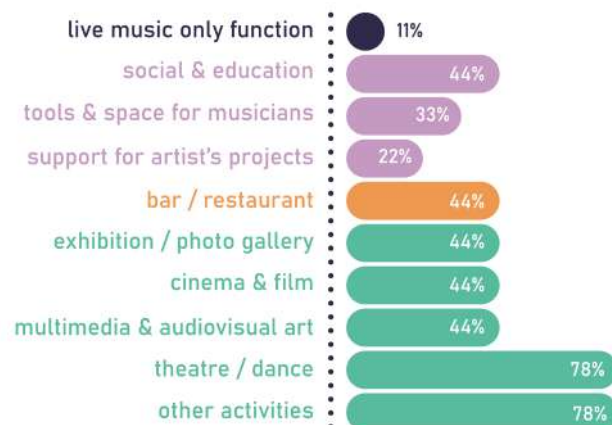
These figures represent 15 live music venues and clubs in Estonia which are part of the association [Live Music Estonia](#).

Based on data (year 2019) of 9 Live Music Estonia music venues, collected during 2020-2021, and extrapolated to data of 15 Live Music Estonia venues.



Most Live Music Estonia venues are **private commercial structures (73%)**.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, Live Music Estonia music venues had a **median audience capacity of 500**.

The music venues presented well over 5,000 artist performances, which attracted almost **500,000 visits**.

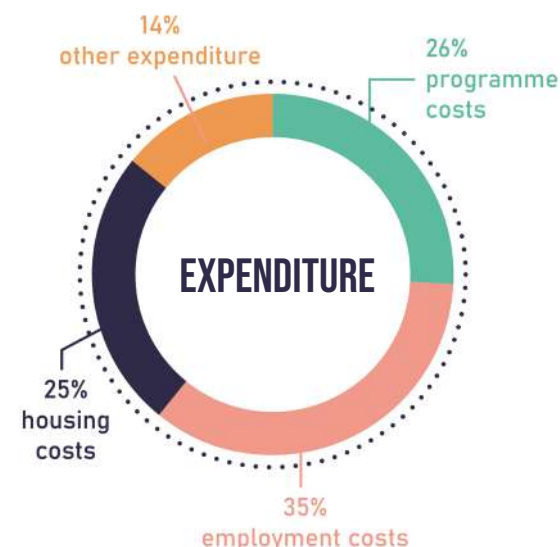
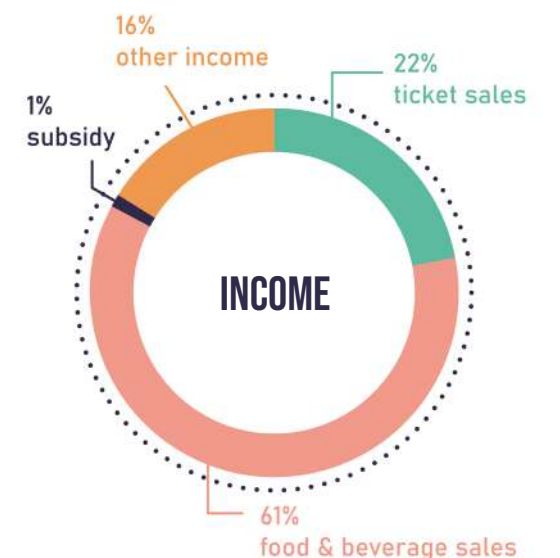
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities. **67%** of all Live Music Estonia music venues also **organised festivals** in 2019.

WORKFORCE IN LIVE MUSIC ESTONIA LIVE MUSIC VENUES AND CLUBS



Over **700 workers** were involved in the Live Music Estonia music venues in 2019, of which **75% paid workers** and **22% volunteers**. In total **83% of all working hours (FTE)** was paid.

50% of the workers was assigned with **gender female**.

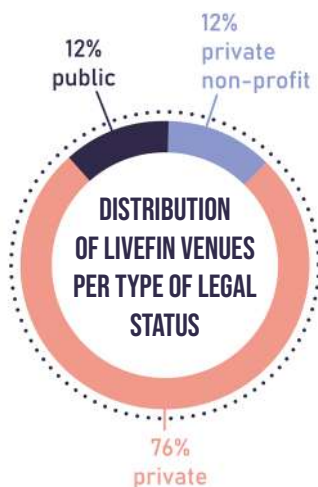


In 2019 the Live Music Estonia music venues had a **total income** of almost **7 million euro**. **Subsidy** was only **1%** of the total income of all venues. The venues generated most income from **ticket sales (22%)** and **food & beverage sales (61%)**.

2019 OVERVIEW LIVEFIN VENUES & CLUBS (FINLAND)

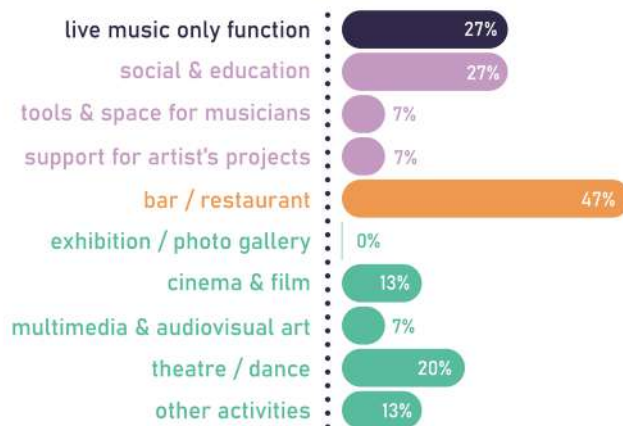
These figures represent 33 live music venues and clubs in Finland which are part of the association LiveFIN.

Based on data (year 2019) of 15 LiveFIN music venues, collected during 2020, and extrapolated to data of 33 LiveFIN venues.



Most LiveFIN venues are **private commercial (76%)** structures.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, LiveFIN music venues had a **median audience capacity of 443**.

The music venues presented well over **11,000 artist performances**, which attracted well over **1.5 million visits**.

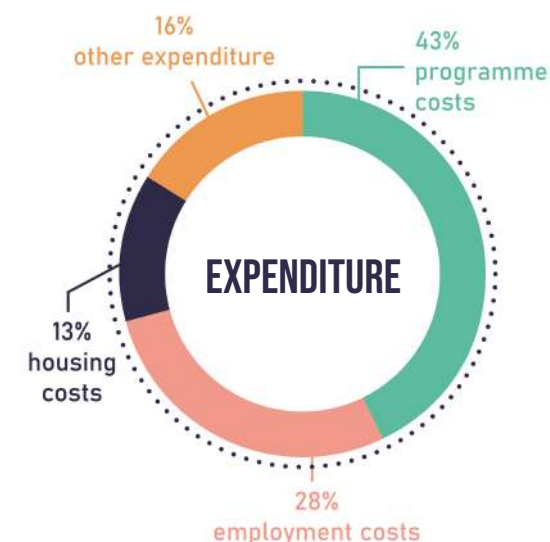
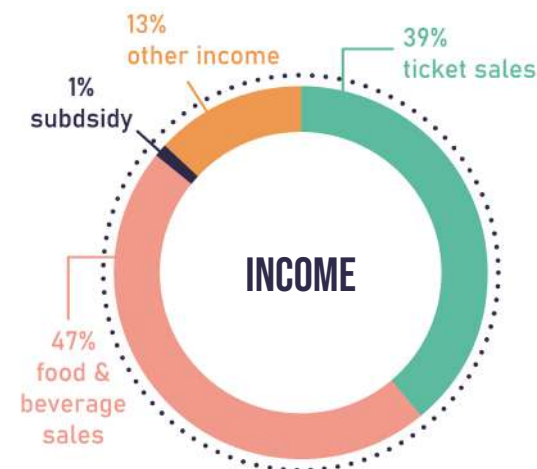
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

53% of all LiveFIN music venues also **organised festivals** in 2019.

WORKFORCE IN LIVEFIN LIVE MUSIC VENUES AND CLUBS



Almost **2,000 workers** were involved in the LiveFIN music venues in 2019, of which **56% paid workers** and **37% volunteers**. In total **89% of all working hours (FTE) was paid**. **48%** of the workers was assigned with **gender female**.



In 2019 the LiveFIN music venues had a **total income** of almost **47 million euro**. **Subsidy** was only **1%** of the total income of all venues. The venues generated most income from **ticket sales (39%)** and **food & beverage sales (47%)**.

2020 OVERVIEW LIVEFIN VENUES & CLUBS (FINLAND)

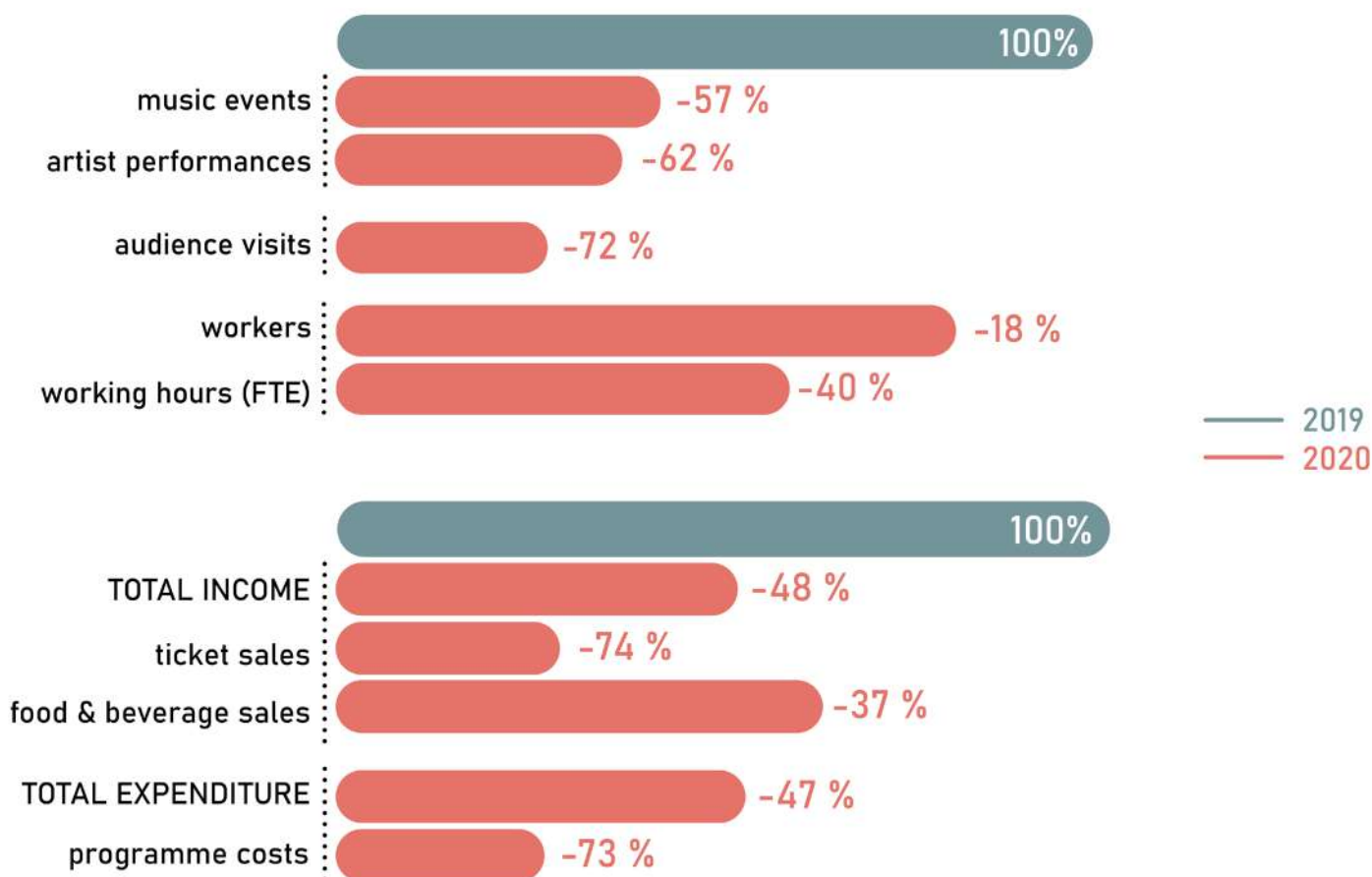
Based on compared data (year 2019+2020) of 10 LiveFIN music venues, collected during 2020-2021.

To learn more about these venues visit www.livefin.fi and/or contact LiveFIN Survey coordinator Maarit Kinnunen, maarkinn@ulapland.fi

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues in Finland.

The government provided COVID support money to the LiveFIN venues in 2020, but this **covered only 13% of the lost income** (2020 compared to 2019) of the music venues.



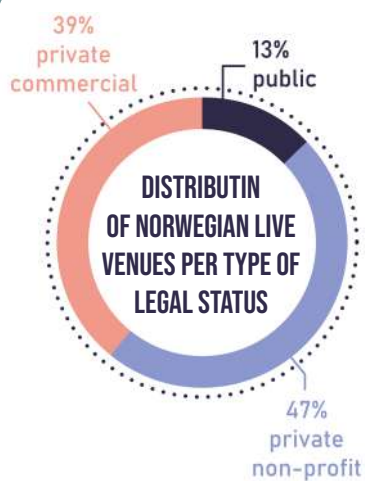


Norwegian
Live

2019 OVERVIEW NORWEGIAN LIVE VENUES & CLUBS (NORWAY)

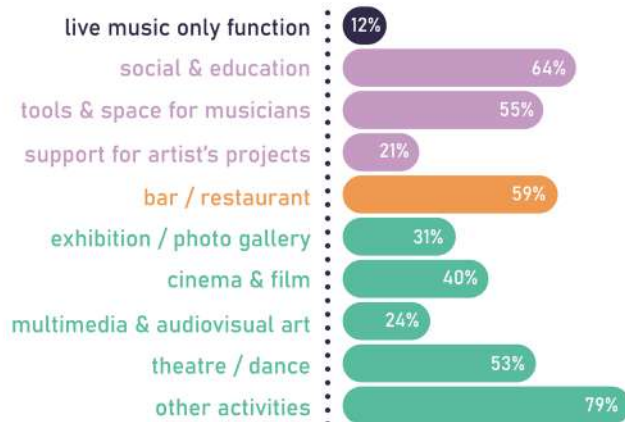
The association Norwegian Live represents 165 live music venues and clubs in Norway.

Based on data (year 2019) of 58 Norwegian Live music venues, collected during 2020-2021.



Norwegian Live venues are a mix of **public (13%)**, **private-non-profit (47%)** and **private commercial structures (39%)**.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



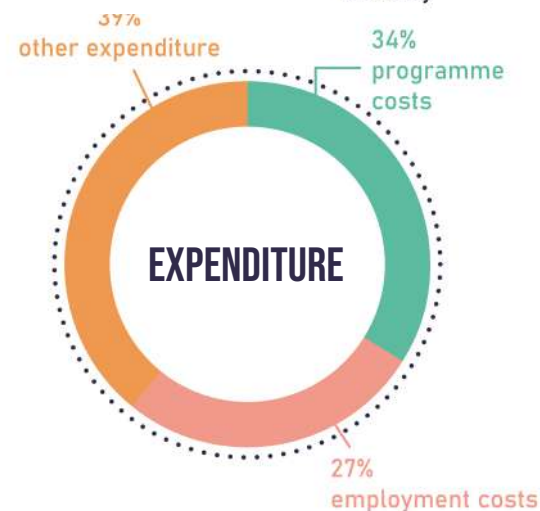
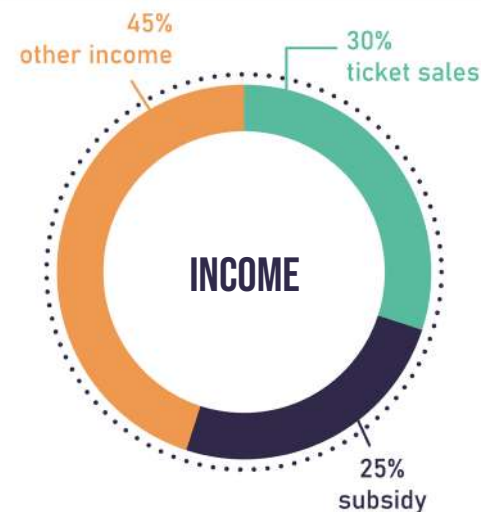
In 2019, Norwegian Live music venues had a **median audience capacity of 385**. The music venues presented a **median of 64 artist performances per venue**, which attracted **18,000 visits median per venue**.

The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

WORKFORCE IN NORWEGIAN LIVE MUSIC VENUES AND CLUBS



The Norwegian Live music venues had a **median of 21 workers per venue** in 2019, of which **25% paid workers** and **75% volunteers**. In total **69% of all working hours (FTE)** was paid.



In 2019, the Norwegian Live music venues had a **median income of 200,000 euro per venue**, but this was less for private non-profit venues (107,000 euro median). **Subsidy was 25%** of the total income of all venues. The venues generated most income from **ticket sales (30%)** and **other income (45%)** such as food & beverage sales.



Norwegian
Live

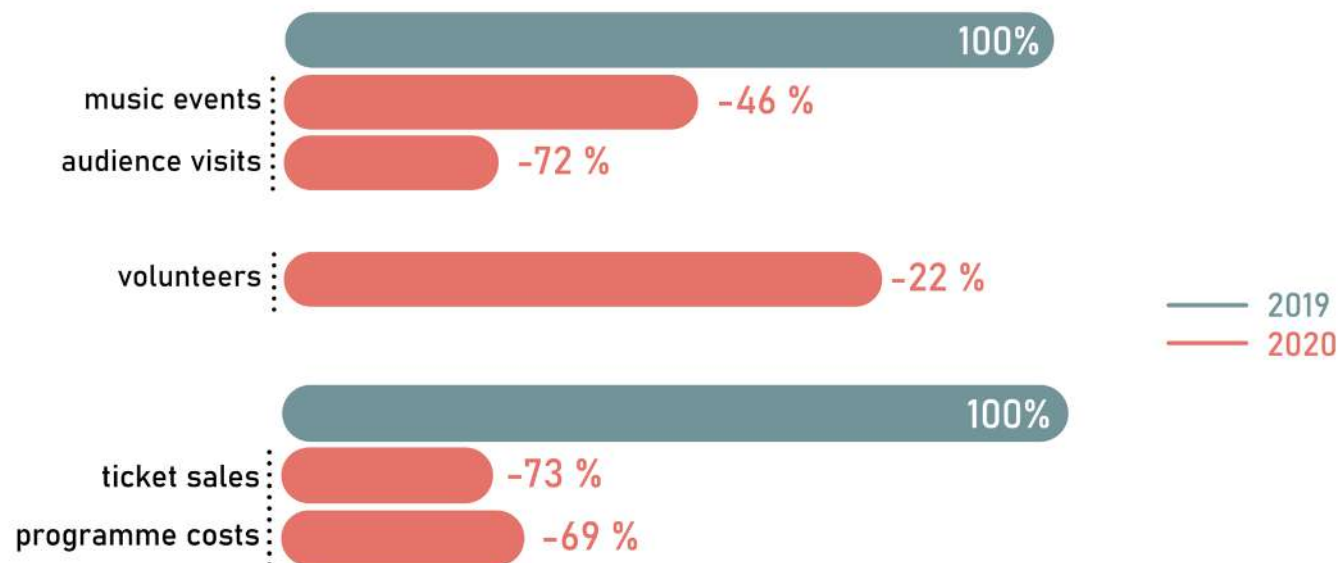
2020 OVERVIEW NORWEGIAN LIVE VENUES & CLUBS (NORWAY)

Based on compared data (year 2019+2020) of 48 Norwegian Live music venues, collected during 2020-2022.

To learn more about these venues visit www.arrangor.no and/or contact Norwegian Live Survey coordinator Mariann Skjerdal, mariann@arrangor.no

IMPACT OF COVID RESTRICTIONS

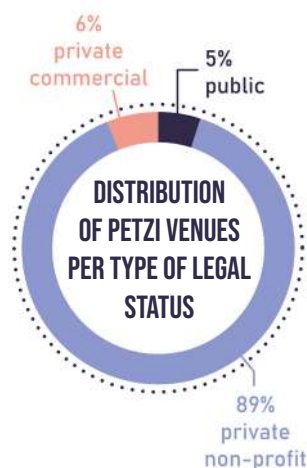
The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues in Norway.



2019 OVERVIEW PETZI VENUES & CLUBS (SWITZERLAND)

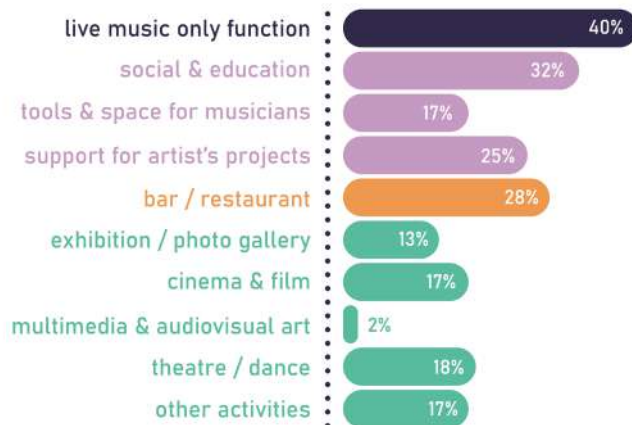
These figures represent 116 live music venues and clubs in Switzerland which are part of the association PETZI.

Based on data (year 2019) of 54 PETZI music venues, collected during 2020-2022, and extrapolated to data of 116 PETZI venues.



All PETZI venues are not-for-profit structures, mostly privately held (95%).

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS

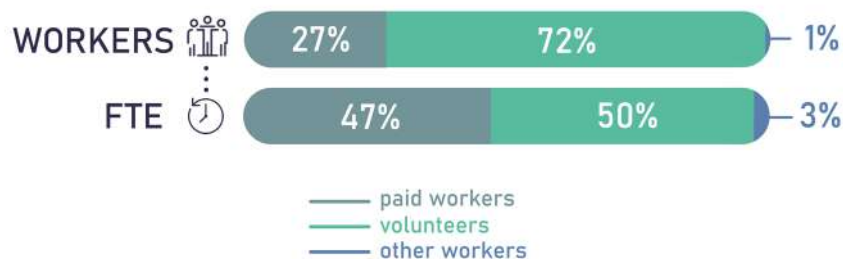


In 2019, PETZI music venues had a **median audience capacity of 300**. Music venues presented almost **19,000 artist performances**, which attracted almost **1.9 million visits**.

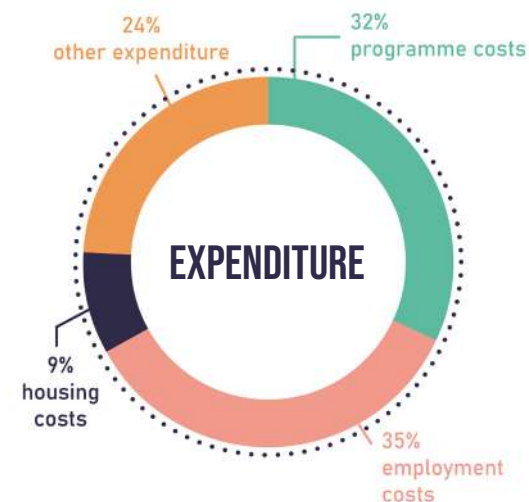
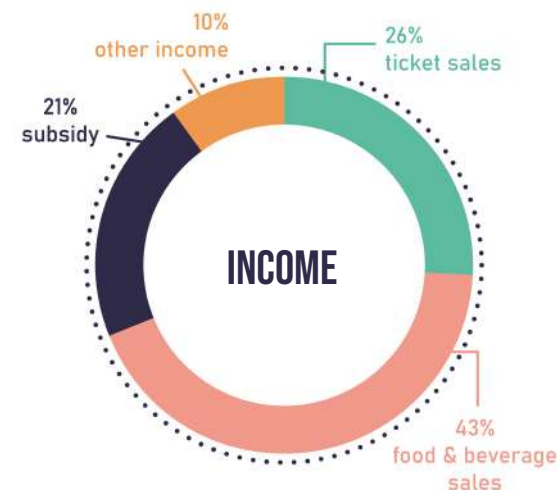
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

60% of all PETZI music venues also **organised festivals** in 2019.

WORKFORCE IN PETZI LIVE MUSIC VENUES AND CLUBS



Over **12,000 workers** were involved in the PETZI music venues in 2019, of which **72% volunteers**. But **47% of all working hours (FTE) was done by paid workers**. **47%** of the workers was assigned with **gender female**.



In 2019 the PETZI music venues had a **total income** of about **74 million euro**. **Subsidy** was **21%** of the total income of all venues. The venues generated most income from **ticket sales (26%)** and **food & beverage sales (43%)**.

2020 OVERVIEW PETZI VENUES & CLUBS (SWITZERLAND)

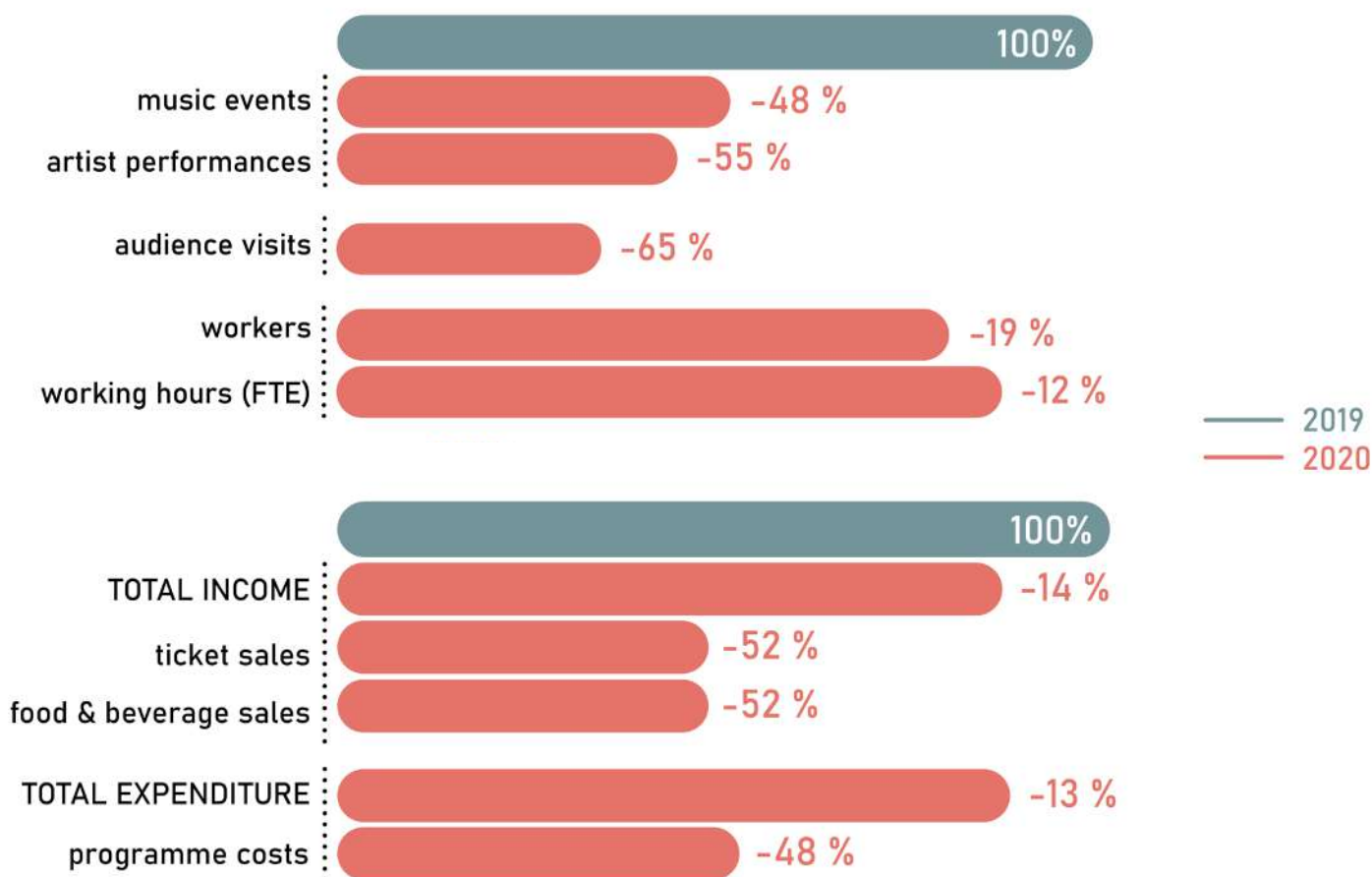
Based on compared data (year 2019+2020) of 54 PETZI music venues, collected during 2020-2022.

To learn more about these venues visit www.petzi.ch/en and/or contact PETZI Survey coordinator Yves Mermoud, yves.mermoud@petzi.ch

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the possibilities and income of performing artists, (hired) workers and suppliers of live music venues.

The government provided COVID support money to the PETZI venues in 2020, which **covered around 55% of the lost income** (2020 compared to 2019) of the music venues.

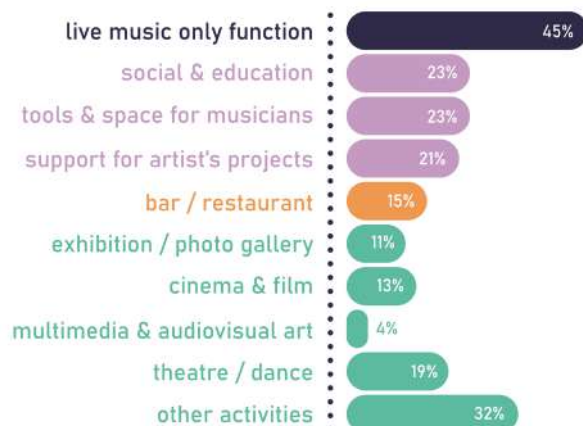


2019 OVERVIEW VNPF VENUES & CLUBS (THE NETHERLANDS)

These figures represent 60 live music venues and clubs in The Netherlands which are part of the association VNPF.

Based on data (year 2019) of 53 VNPF music venues, collected during 2020, and extrapolated to data of 60 VNPF venues.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS

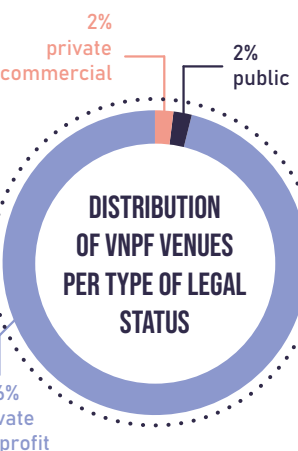


In 2019, VNPF music venues had a **median audience capacity of 590**.

The music venues presented well over **27,000 artist performances**, which attracted almost **4.2 million visits**.

The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

87% of all VNPF music venues also **organised festivals** in 2019.

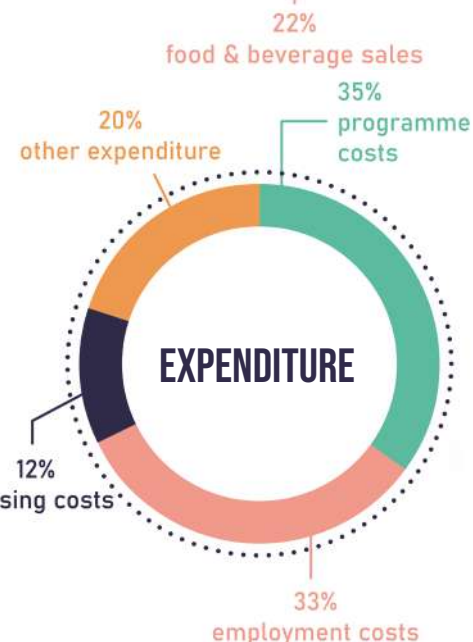
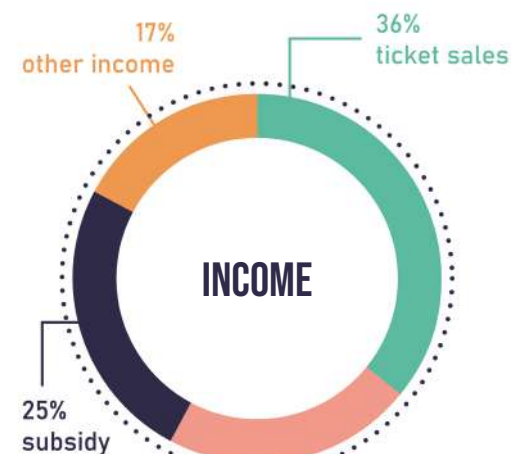


Almost all VNPF venues are **private non-profit structures (96%)**.

WORKFORCE IN VNPF LIVE MUSIC VENUES AND CLUBS



Over 9,700 workers were involved in the VNPF music venues in 2019, of which **43% paid workers** and **54% volunteers**. In total **74% of all working hours (FTE)** was paid. **42%** of the workers was assigned with **gender female**.



The VNPF music venues had a total **income** of well over **192 million euro**. **Subsidy** was **25% of the total income** of all venues. The venues generated most **income from ticket sales (36%)** and **food & beverage sales (22%)**.

2020 OVERVIEW VNPF VENUES & CLUBS (THE NETHERLANDS)

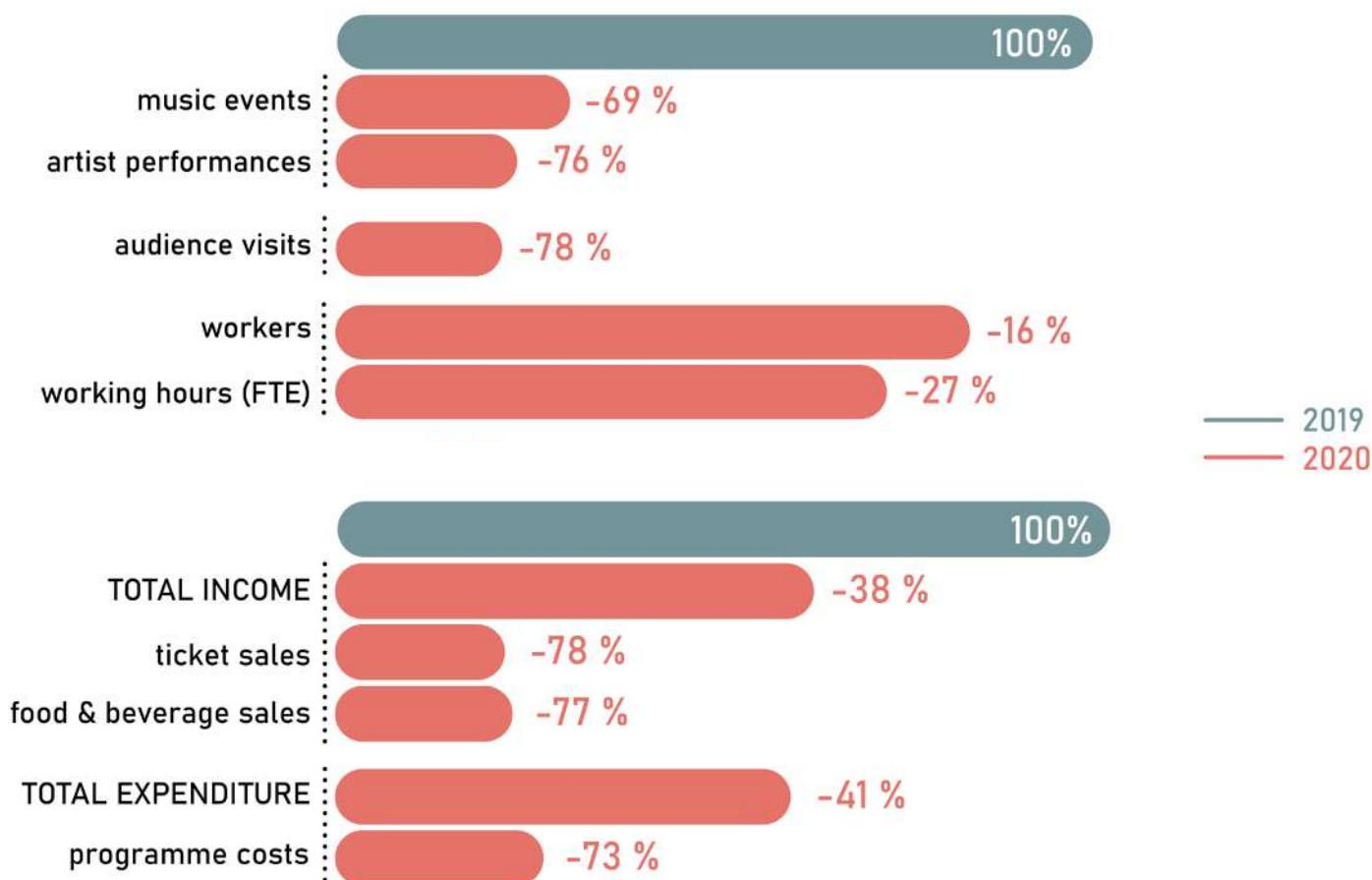
Based on compared data (year 2019+2020) of 48 VNPF music venues, collected during 2020-2021.

To learn more about these venues visit www.vnpf.nl and/or contact VNPF Survey coordinator Arne Dee, arne@vnpf.nl

IMPACT OF COVID RESTRICTIONS

The pandemic restrictions imposed by the government had an enormous impact on the total possibilities and income of performing artists, (hired) workers and suppliers of live music venues.

The government provided COVID support fund to the VNPF venues in 2020, which **covered 32% of the lost income** (2020 compared to 2019) of the music venues.



About Live DMA

LIVE DMA, A COLLECTIVE VOICE FOR THE EUROPEAN LIVE MUSIC SECTOR

Created in 2012, [Live DMA](#) is a European non-governmental network supporting live music associations. By nurturing exchange of information and good practices between its members and working as a collective voice for the sector, Live DMA aims to enhance the recognition of live music venues, clubs and festivals all over Europe, as essential cultural, economic and social operators.

The network is now composed of 20 members situated in 16 countries. The members are regional and national live music associations that represent over 3000 music venues, clubs and festivals located all over Europe.

In 2017, the European Commission recognized Live DMA as European network and granted, via the Creative Europe programme, funding to develop the network's project Live Style Europe. Live Style Europe is a "building capacity programme" with the objective to empower music venues, clubs, festivals, along with regional and national live music associations and to provide them with skills and tools in order to adapt to the changes of the music sector.

As member of the European Music Council, and the International Music Council, Live DMA is also actively engaging with other European cultural networks in order to make changes in the European approach to culture with the aim to include culture and the arts in the long-term goals of the European project.



Survey population & methodology

In this study, Live DMA represents 2,280 music venues and clubs of 20 venue associations in 16 different countries. The data results are based on data of year 2019 of 522 music venues and clubs part of 12 Live DMA members in 10 different countries and extrapolated to data of 2,280 music venues and clubs part of Live DMA. In addition, we compared data of years 2019 and 2020 of a panel of 303 music venues and clubs part of 10 Live DMA members in 8 different countries. The survey response numbers per Live DMA member can be found in this report on the pages with data overviews per Live DMA member. All financial numbers in this Survey are in EURO and excluded VAT.

Since 2012, Live DMA and its members collect data to monitor and represent the music venues and clubs on regional, national, and European level and compare them on different scales. The Survey measures information about the venue's organisation, capacity, functions, events, performances, visits, human resources, income, and expenditure. The questions and definitions are synchronized for all participating Live DMA members to create useable totals, average and median numbers.

The Survey is repeated every year by most Live DMA members to keep track of the most actual numbers and situation in the live music sector. It ables them to monitor the situation, discover trends and developments, and set priorities. Live DMA collects the data of all Live DMA members to further analyse the results and periodically publishes Survey reports with key numbers and main conclusions.



Definitions

Legal status (administrative format):

- Public (State or local authorities, public body, public establishment)
- Private non-profit (including not-for-profit or limited profit structure)
- Private commercial structure (company, sole entreprise, partnership, cooperative societies)

In case a venue organisation has more than one legal status we register the one that the venues most identifies with regarding live music programming.

Audience capacity of the music venues includes only the spaces used for music events, such as concert halls. It's the capacity of all concert halls added up that can be used simultaneously, on account of which the whole accommodation can be seen as sold out. It does concern the financial number, not the engineering capacity or the number of attendants authorized by the fire department. Audience capacity without any limitations and restrictions caused by pandemic measures.

Social & Education activities of music venues and clubs are for example cultural actions, community work, music courses, partnership with schools, etc.

Tools & space for musicians of music venues are for example rehearsal studios, recording, studios, resource centres, etc.

Support for artists' projects of music venues are for example artist residency programmes, administrative and technical trainings, etc.

Bar/restaurant function is applicable if the music venue also functions as bar/restaurant outside concert hours.

Music event is a public event that is promoted as one programme with a separate admission fee or free admission. Music events can include multiple music performances of acts/bands/DJ's.

Paid visits concern the attendants to music events that pay any form of admission fee.

Free visits concern the attendants to music events that pay no form of admission fee, because the music event has no admission fee, or they are invited as guests to music events with an admission fee.

Online events concern digital, radio, television (broadcasting and live streaming) music events.

Definitions

Online views concern the number of times a digital, radio, television (broadcasting and live streaming) music event has been viewed (or listened) online by users.

Human resources include all the venues and clubs' workers (paid employees, other paid workers, volunteers and other workers) as well as the volunteers of FEDELIMA venues in France that cannot legally be defined as workers.

Paid employees include the workers on the venues own payroll. It excludes other paid workers (such as hired freelancers), volunteers and other workers with or without financial compensations, like interns. It also excludes the performing artists and artists' own crew.

Other paid workers include hired paid workers, such as freelancers or temporary workers. It excludes the workers on the venues own payroll (employees), volunteers and other workers with or without financial compensations, like interns. It also excludes the performing artists and artists' own crew.

Volunteers are people who perform a service for the venue voluntarily and in their free time. Volunteers do not receive any salary, at the most (financial) compensations allowed for volunteers. It excludes other workers with or without financial compensations, like interns. It also excludes the performing artists and artists' own crew.

Other workers are for example interns, trainees, defrayed, civic services, etc. working for music venues. It excludes workers on own payroll, hired staff, subsidized employees and freelancers. It also excludes volunteers, the performing artists and artists' own crew.

Gender workers is the gender (male, female, or other gender) that is assigned to workers by the venue organisation. This is not per se the gender that the workers identify themselves with.

FTE stands for Full Time Equivalent. The workweek can differ per organisation, and thus the value of an FTE. For example, for an organisation that uses a standard work week of 40 hours, a staff member with a working week of 40 hours equals 1,0 FTE ($40/40=1,0$). A staff member with a working week of 32 hours equals 0,8 FTE ($32/40=0,8$).

Total income is the sum of the venues ticket sales, food & beverage sales, subsidies, COVID support money from governments, other COVID support money, and all other income.

Definitions

Ticket sales is all income or revenues. It excludes other and indirect programme related income such as wardrobe, cloakroom, reservations, memberships, and merchandising.

Subsidies is all income from public funds, municipality, region, state, European Union, etc.

COVID support money from governments is all pandemic related subsidy from public funds, municipality, region, state, European Union, etc.

Other COVID support money is all pandemic related income that is not from governments. For example support money from private foundations, companies and private persons (crowdfunding).

Food and beverage sales is all income from the sales of food, drinks, beverages, catering, etc.

Total expenditure is the sum of programme costs, housing costs, employees costs, food & beverage purchase and all other costs.

Programme costs are all costs directly related to the artist performances, such as wages, bailouts, partage payments, author/copyright fees, booking fees, artists catering, extra backline or extra decor. Advertising costs are not included. In house sound systems, décor, backline, hall rentals, etc are not included.

Employment costs are all costs for employees, other paid workers, volunteers and others working to make the music events possible, in preparation and during the event. It includes gross salaries, plus employees' social insurance and volunteers' costs. Gross salary includes payment in the form of additional rewards like allowances, bonuses, overtime, reimbursements living/traffic, contributions (premium) savings and benefits, etc. The social charges include the employer's share of social security contributions, pension costs, contributions to health insurance, compensation for relocation, housing, childcare, work clothes, etc. Volunteers' costs can include costs for activities, travel, accommodation, education and training, insurance, meals, etc. It does not include artists fees and compensations.

Housing costs are all costs for renting the building, insurance, energy, water, cleaning, remote monitoring large, and small maintenance (such as service contracts, installations).

ALL FINANCIAL NUMBERS IN THIS SURVEY ARE IN EURO AND EXCLUDED VAT.

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