



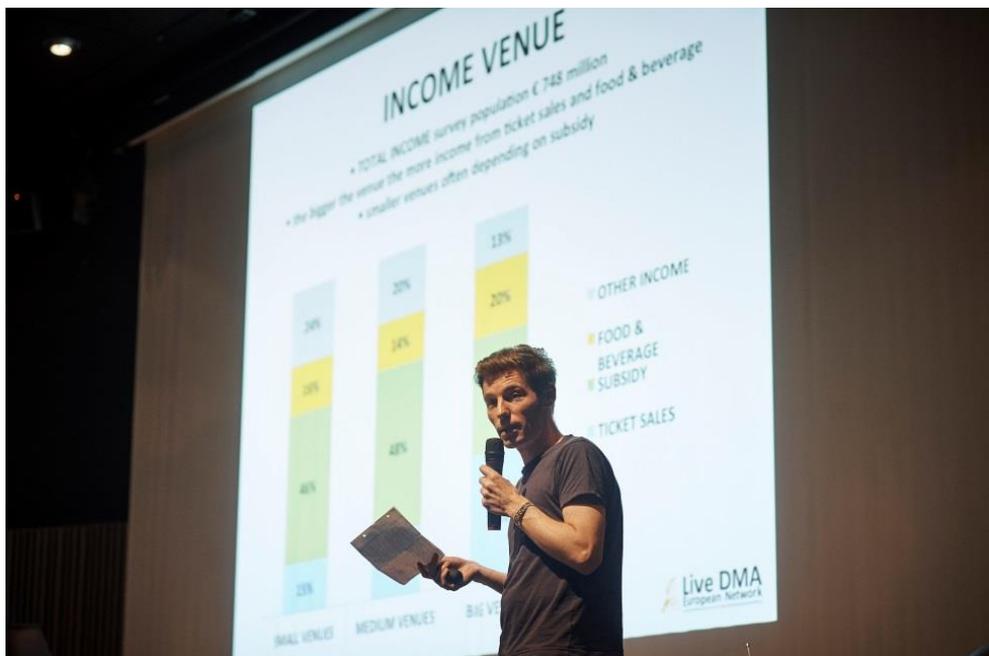
Live DMA European Network

Linking Initiatives & Venues in Europe (Developing Musical Actions)

Presentation of the study on music venues in Europe (The Survey)

Speaker: Arne Dee (Live DMA)

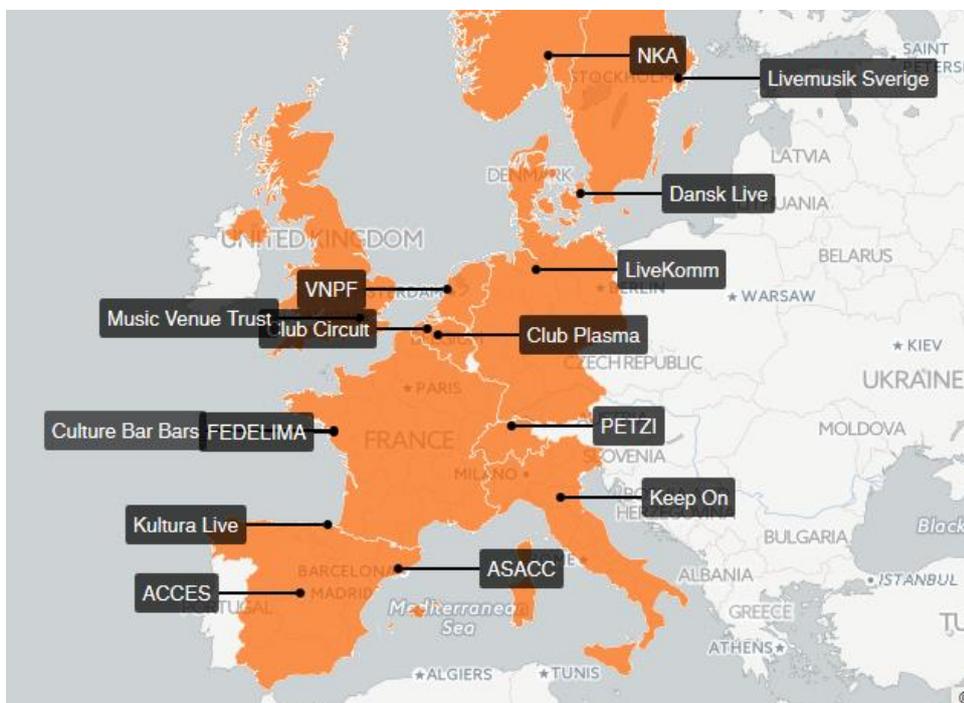
The Live DMA network represents over 2300 music venues and festivals in Europe. Since three years Live DMA has been carrying out a study of the situation of European music venues, underlining their particularities and current challenges. The survey measures the audience capacity, number of music activities and visits, employment rate, income and expenses of the music venues in different countries. The most recent results were revealed during a presentation at PrimaveraPro 2016 music conference in Barcelona. Is the sale of tickets enough to cover the costs of the programme? What role do volunteers play in the venues teams? What percentage of the income is covered by sales of food and beverage? How much grants are received?



Arne Dee (Live DMA survey coordinator) answers all questions in the Live DMA survey presentation, during PrimaveraPro 2016 music conference in Barcelona.

Live DMA: 2080 music venues in 11 countries

Live DMA is an umbrella network gathering 15 associations of music venues and music festivals in 11 countries. There are 2308 member's members in total, of which 2080 venues and 228 music festivals. Live DMA works on different levels. Firstly on an artistic, cultural and social front with a focus on promoting artistic discovery, emergence and innovation, talent development, cultural diversity, social impacts and educative activities. Live DMA also works on a political front by promoting the importance of live music as professional performing art, cultural development, advising and influencing rules and regulations on local, regional, national or international scales and trying to gain legitimacy on the European political field. Thirdly Live DMA works on a economic front in favour of a mixed economy of self-made incomes and public funds, non-profit logic, cooperation processes between the public sector, private sector and citizens and exchanging knowledge between festivals & venues.



Survey: facts about performances, visits, employment and finance

Since 2011, Live DMA collects data to represent the venues on a European level and compare them on different scales. The survey measures the venues:

- capacity, activities, performances and visits;
- employment: paid staff, volunteers, interns and others in persons and full time jobs;
- finance: programme costs, ticket sales, subsidy, food & beverages, total income, total expenses and financial result.

The survey will be repeated every year so we can soon discover trends and developments. Every year more countries and venues participate in this Survey. In 2014, Live DMA was counting fewer members, so the Survey was addressed to 837 venues, of which 435 responded, representing a rate of 52%. Fedelima (France), Norske Konsertarrangører (Norway), Dansk Live (Denmark), VNPF (Netherlands), PETZI (Switzerland), ACCES (Spain, excl. Catalonia), ASACC (Catalonia, Spain), Club Plasma (Wallonia, Belgium), Clubcircuit (Flanders, Belgium) have participated in the Survey. LiveKomm (Germany) is not included in the survey population, but some results of their own survey are included in the comparisons in the survey presentation.

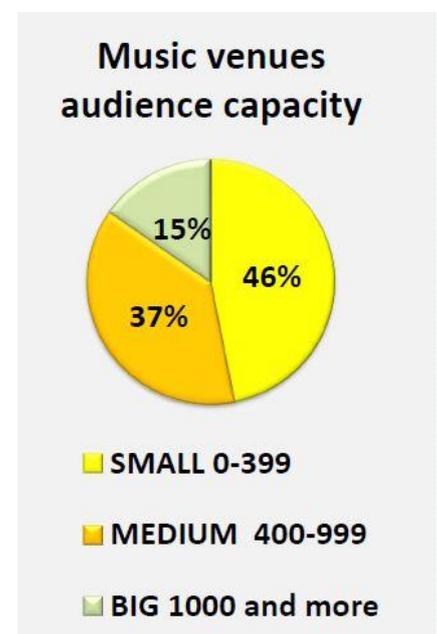
What is an 'average' music venue at European scale?

If we use the data to draw an average music venue, then the venue profile would look like this: a venue with 583 audience capacity that organises 107 music activities per year, during which 200 music acts perform. The venue welcomes 26 640 visitors, of which 78% paid entrance and 22% were free visits. The venue's team consists of 81 people of which 21% are paid employees, 66% volunteers and 13% interns or other workers. Because the paid employees work more hours per week, expressed, in full time equivalent (FTE) 55% of the work is done by the paid staff, while 37% is done by volunteers and 9% by others.

The average venue's budget is €900.000, of which the programme costs represent 34%. The average ticket sales per visit is €8,49. Since ticket sales represent only 25% of the total income, other income is needed to realise the current level of music programming. This comes from the sales of food & beverage (17%) and most importantly government subsidies which represents 41% of the total income of an average European music venue. It's important to mention here the differences per country and between smaller and larger venues can be enormous, so it's important to also look at the data in more detail.

A large scale of music venues capacities and activities

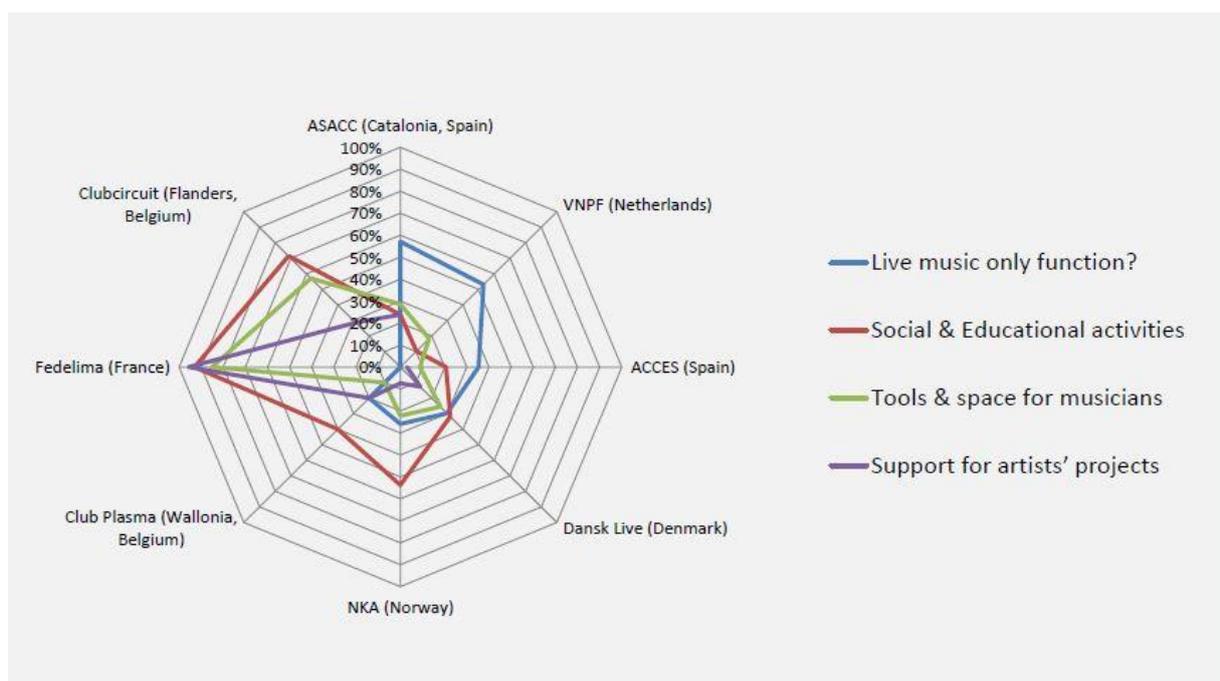
An average audience capacity of 583 means that 66% of the surveyed venues are below the average. 46% of the music venues has a small capacity (under 400), 37% has a medium capacity (400-999), and 15% has a large capacity (1000 or more). Live DMA's network is mainly composed of numerous small and medium sized venues where local and/or emerging artists start their carriers in all the different parts of Europe (urban and rural areas).



These venues are also an opened space for the audience to enjoy concerts but also practise music. Indeed, the survey results show that only 23% of the venues only have a live music programming function, which means 77% of the organisations combines live music with other activities, like:

- 53% organise social and educational activities
- 43% has tools and spaces for musicians (i.e. rehearsal rooms, studios)
- 45% support artistic projects (i.e. trainings, professional advice, support concerts)
- 29% has an exhibition/photo gallery
- 18% has a theatre/dance room or activities
- 13% is working on audio visual/multimedia arts
- 10% has a cinema room or organise film activities

The music venue plays an important role in the cultural life of the area where it belongs, as a citizen space for artistic expression and artistic & cultural diversity.

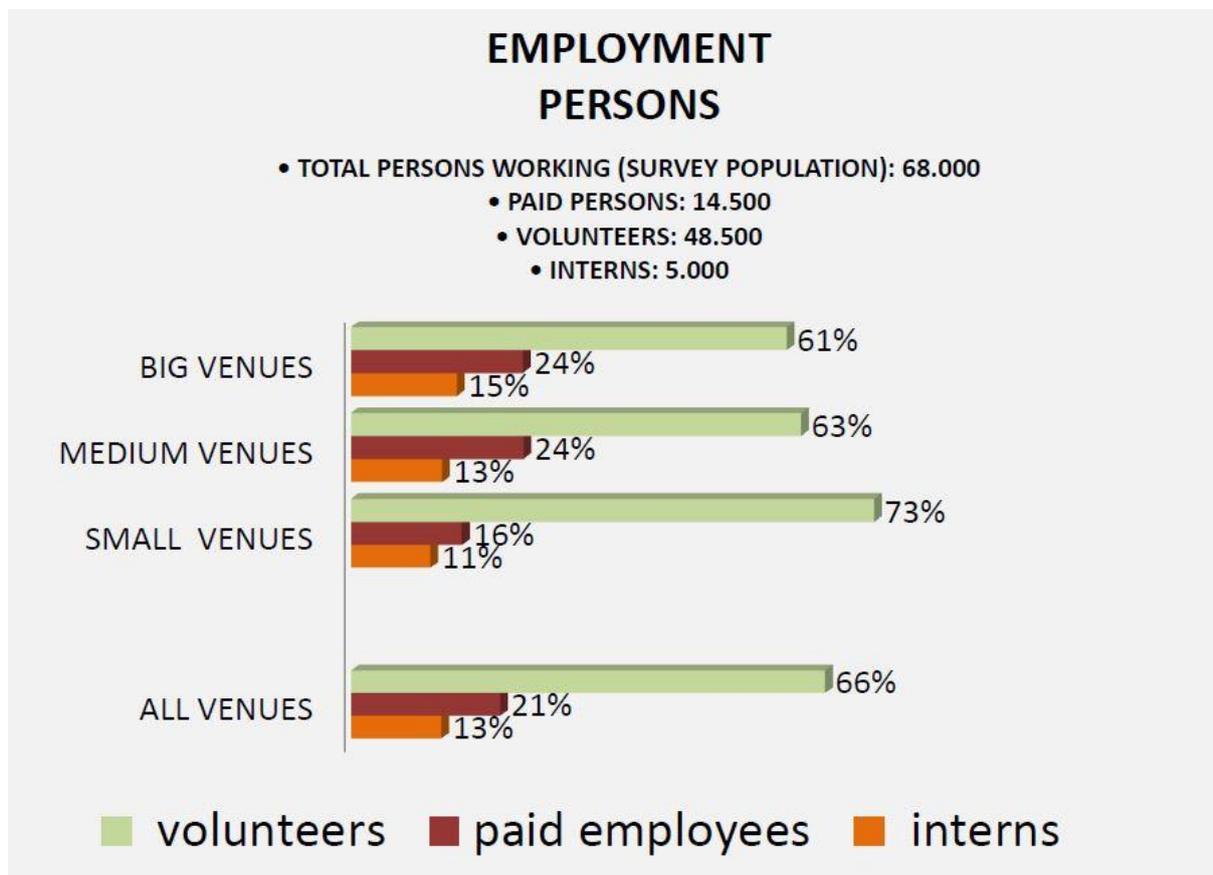


Still, the music venues profiles show specific trends from one country to another; especially in The Netherlands and Spain music venues activities are strongly dedicated to programming live music only, where venues in Belgium and France seem to focus also on social & educational activities and/or tool and spaces for musicians.

In total, nearly 90.000 music activities and 190.000 performances have been presented in the 837 music venues that are part of this Survey, of which 16% had free entrance. The music venues welcomed over 22 million visits of which 78% with paid entrance. Of course, the bigger the venue the more audience visits (79.270 average per year at larger venues; 21.965 at medium sized venues and 11.359 at smaller venues).

Employment in music venues: importance of volunteers

The music venues are ran by professional teams, but the amount of work volunteers do to realise the music activities is essential. In total, 14.500 professionals (6.200 full time jobs), excluded artists, are working in the 837 music venues that are part of this Survey. Next to that 48.500 people (4.400 full time equivalence) are volunteering in the venues. Finally 5.000 students or apprentices (1.000 full time equivalence) have realised their internship in a music venue. Smaller venues have generally less paid staff and more volunteers than larger venues. In countries with mainly private music venues (Spain, Germany) the amount of paid staff is much higher than volunteers.

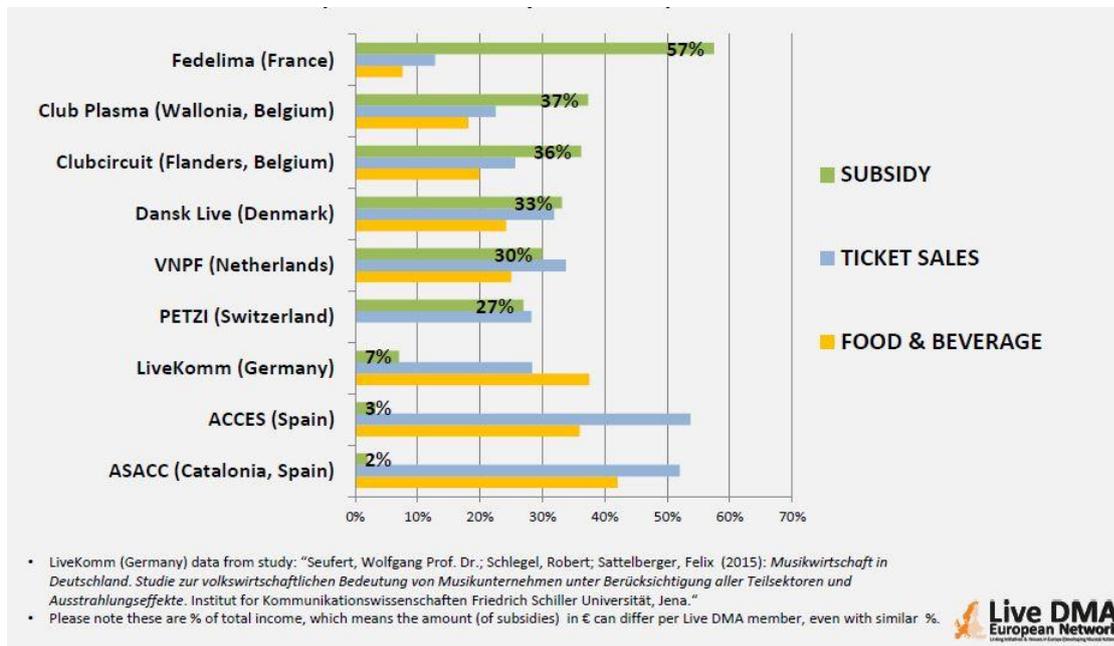


Where do music venues get their money from and how do they spend it?

The total income of the 837 music venues that are part of this Survey is 748 million euros while the total expense is 756 million euros. Most venues in most countries are non-profit organisations, but the business models are different from one country to another. Music venues in France and Belgium get more subsidies. but they also propose more social & educational activities. In Spain and Germany most venues are private organisations.

The direct programme costs are about one third (34%) of the total expenses of the average venue and this is very similar in different European countries and for different sized venues.

The bigger the venue, the more income from ticket sales and food & beverage they have. Smaller venues often depend more on subsidy.



Ticket sales in general do not cover the programme costs:

- in large venues, ticket sales cover 94% of the direct programme costs
- in medium venues, ticket sales cover 54% of the direct programme costs
- in small venues, ticket sales cover 53% of the direct programme costs

This means the current level of programming can only be maintained if enough other income is realised. In average the venues realise 17% of their total income from the sales of food & beverage. Most important for (especially the smaller) venues is the support of governments and foundations in the form of subsidies, which generates an average of 41% of their total income. In France, ticket sales cover only 37% of the programme costs while in Spain it covers more than 100%, which makes sense if we compare this to the percentage of subsidies allocated to the venues in these countries (57% of total income in France, 3% in Spain).

If we use these data to draw the estimations for the whole Live DMA network, then it would show that, in these 11 European countries:

- 222 000 music activities, 396.000 artist performances and 56 million visits per year
- 48 500 paid personnel working and 120 500 volunteers
- Financial turnover of nearly 2 billion euros (€1.870.000.000) per year.

For more information download the whole presentation [here](#).