

LIVE MUSIC VENUES AND CLUBS IN EUROPE FACE RISING COSTS AMID PANDEMIC RECOVERY

Facts & Figures, data 2019–2022

Publication December 2024

Esinam at Belvédère Namur - 2021 © Nicolas Jaumain

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LIVE DMA NETWORK IN 2024

Based on data from Live DMA *Members Inventory 2024*

20 MEMBERS

16 COUNTRIES

2428 LIVE MUSIC VENUES & CLUBS



Live DMA General Assembly, Palermo (IT) - 2024



INTRODUCTION

[Live DMA](#) is a European non-governmental network representing 20 live music associations in 16 different countries. This report is an update of the Live DMA Survey report published in May 2023. Firstly, the report presents new figures of 2021 and 2022 for the venues and clubs, to show the pandemic effects in 2021 and 2022, as well as the initial recovery and inflating costs during 2022. In addition, it presents the key figures from 2019 of the 2,280 music venues and clubs that were part of Live DMA in 2023, to provide a useful picture of the last year without pandemic effects. Finally, it presents an overview of the available figures 2019-2022 per Live DMA member. The report shows key 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 visitors than ever before. This created many jobs and had a huge artistic and economic impact.

From March 2020 until March 2022 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 themselves 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 very helpful and necessary for the venues and clubs to survive the pandemic financially, but did not prevent the artists, workers, and suppliers in the sector from suffering enormous damages.

The figures in this report show that most of the venues and clubs survived the pandemic and managed to regain workers and audiences afterwards, but the pandemic also put many venues and clubs in a weaker financial position. Furthermore, the 2022 data also show the sharp increase in costs. The rising fixed costs, such as employment and housing costs, were not automatically

compensated with more income, such as increased subsidies or more ticket sales, leaving venues and clubs with financial deficits.

Although data for 2023 and 2024 are not yet available in most countries, current observations point out that in 2024 it's still a major challenge for most venues and clubs to generate sufficient income, maintain their activities and fulfil their missions. When venues are at risk of negative financial results, they are often forced to cut back on staff, but also on talent development and more diversity in their programming. Diversity in programming often entails risk taking, in contrast to more mainstream music which can easily guarantee income. Therefore sufficient support for the live music sector by governments will remain very necessary to ensure inclusive and innovative programming as well.



Gare de Lion, Wil (CH) © Dario Hässig

VIBRA CLUB (MODENA, IT)

*Portrait of a small private non-profit venue
Interview with Bruno Giusti (Programmer)*



CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

Vibra Club is a live music venue in Modena, Italy. It has a concert hall with 300 person capacity, where concert and DJ sets are organized. Vibra Club also produces festivals and brings on a Web radio as a special project hosted inside the venue.

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

The most important topic of our venue is the social impact. About the program: I'm so proud of 18 years of reggae events every Friday night.

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

The biggest impact was definitely on workers, artists and club goers. Unfortunately, nothing has gone back to how it was before; 2 years of forced closures have changed the public and changed the way the public has started to enjoy shows, music, cinema. We have not yet returned to the numbers of before the pandemic and perhaps we never will.

NOW IN 2024, 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 have several problems, none of which is more important than the other because they are all linked. We cannot find staff suitable for the club's nightlife. The public is no longer attached to the venue as it used to be but only attends when there are events. The general increase in costs does not help attendance. Without financial contributions (public or private) we will no longer be able to guarantee the artistic quality of before. I would like to start again by searching for new talents but it is a job that not only requires the right sensitivity but also takes a lot of time and economic resources to do.

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

Definitely that of containing the general costs of running the club. Developing more and more a research and development office of our structure, towards public and non-public contributions and towards the search for new artists, with the aim of trying to propose artistic quality.

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

Given the high management costs, we will produce fewer events and consequently fewer opening nights but with a higher artistic quality.

In 2023, KeepOn LIVE gathered data 2022 from live music venues in the Emilia Romagna Region in Italy. This action, in collaboration with Regione Emilia Romagna and Ater Fondazione, has been requested by the regional administration to have evidence on which to base the update of the regional law on music, in order to sustain and foster the development of the local music scene with concrete actions deriving from data analysis. [Find the full report here.](#)

© Luca d'Agostino

IMPACT OF COVID IN 2020-2022

The pandemic restrictions imposed by the governments from March 2020 until March 2022 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 far fewer 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 catering 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 varied by type of venue. The figures on the following 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 are almost completely dependent on income generated by audiences, which was largely lost in 2020 and 2021, while most non-profit venues and all public venues were still able to count on regular subsidies to cover (part of) their fixed costs during the pandemic. Despite the greatest need, private commercial venues also received less COVID support money from governments than non-profit venues. In addition, the recovery of private commercial venues in 2022 was clearly slower than that of non-profit venues.



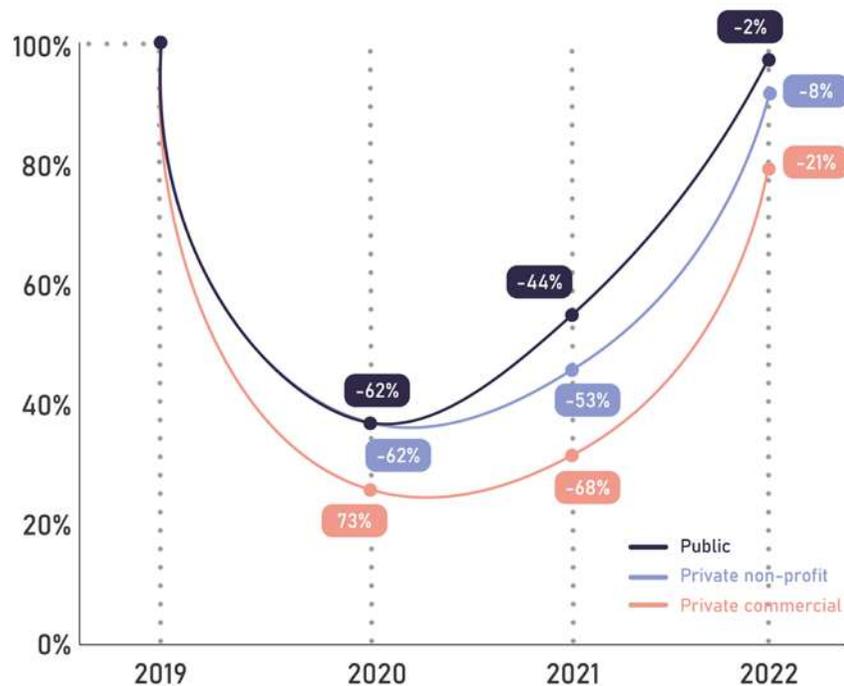
IMPACT OF COVID ON PROGRAMMING

The pandemic restrictions made it virtually impossible to organize music events and present artists in 2020 and 2021. As far as there was still a possibility to present live music, this was financially more difficult for private commercial venues than for non-profit venues, which could still count on some regular subsidies and received more COVID support funds. At the beginning of 2022, many venues and clubs were still dealing with pandemic restrictions, but from the second quarter of 2022, the restrictions were lifted across Europe and artists were finally able to perform live under normal circumstances again. This year saw many rescheduled concerts, which were postponed in 2020 and 2021, leading to a relatively quick recovery of the total number of music events and artist performances in 2022 compared to 2019.

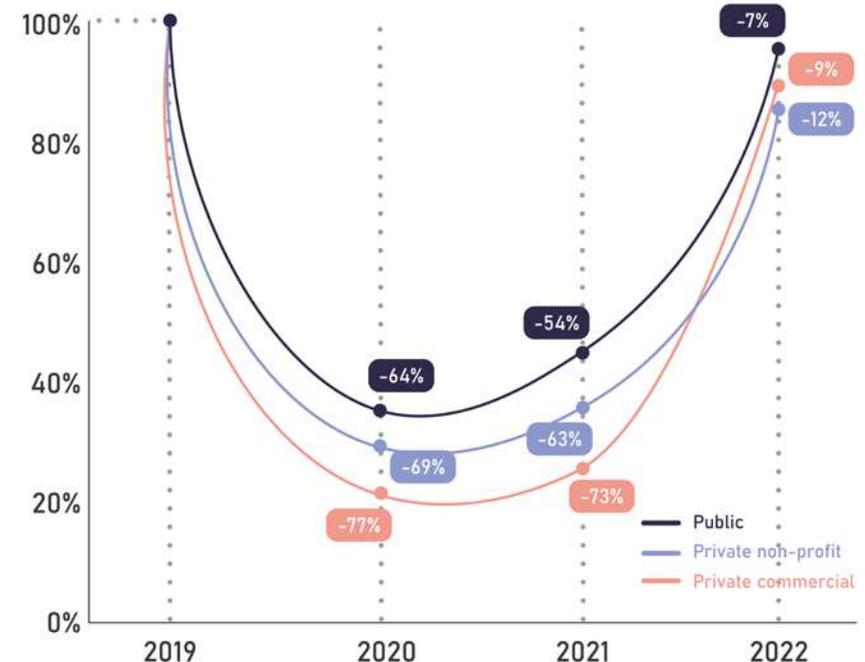


Sala BARTS, Barcelona (CAT) © Carles Rodriguez

MUSIC EVENTS



ARTIST PERFORMANCES



LA LUNE DES PIRATES (AMIENS, FR)

Portrait of a small public venue

Interview with Antoine Grillon (Director / Booker)



Ludo Leveu © Lune des Pirates

CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

La Lune des Pirates is a 250-capacity concert venue located in the Saint Leu district of Amiens, in the north of France. Operating since 1987, it is one of the oldest venues in the country. Recognised as a SMAC (a label awarded by the Ministry of Culture), the venue focuses on three main areas: hosting concerts, organising cultural initiatives, and supporting local artists. Since 2018, La Lune des Pirates has also been hosting the “Minuit avant la Nuit” festival, which attracts nearly 15,000 spectators each year.

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

The association behind La Lune des Pirates is proud to have stood the test of time since 1987, continually evolving and growing the project. Over the years, it has consistently reinvented itself, adapting to build audience loyalty and meet the changing needs of different groups. Artistically, the team has remained highly discerning, ensuring that the programming stays relevant to the cultural trends of each era. Despite its relatively small capacity, La Lune des Pirates has established itself as a key player in the national live music scene.

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

The impact was significant on several levels. First, the connection with the audience was lost, as we were unable to offer concerts in ‘acceptable’ conditions. We tried seating audiences, but the experience was too diminished. It was counterproductive and economically unsustainable. Furthermore, La Lune struggled to maintain its connection with artists and, more broadly, to fulfill its role within the industry, despite the development of audiovisual productions. Finally, the team was deeply affected by remote work and the sense of lack of purpose that emerged.

NOW IN 2024, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

In 2024, the pandemic no longer directly affects ‘La Lune des Pirates.’ The only significant change we’ve noticed is in the programming schedule, which is now much earlier. This shift is something we don’t particularly appreciate, as we prefer to work with late bookings to seize as many opportunities as possible for artists on tour who have days off.

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

La Lune des Pirates will be fortunate enough to manage a second brand new facility— a 500-seat venue with a bar, studio, and new offices—complementing the historic venue. This new venue is scheduled to open in the autumn of 2025. The primary challenge for the association will be successfully navigating this transition and launching a dual-project operation. A key concern will be the financial viability of the project, especially in the current economic climate marked by general inflation, which is putting significant pressure on public finances and budgets in France.

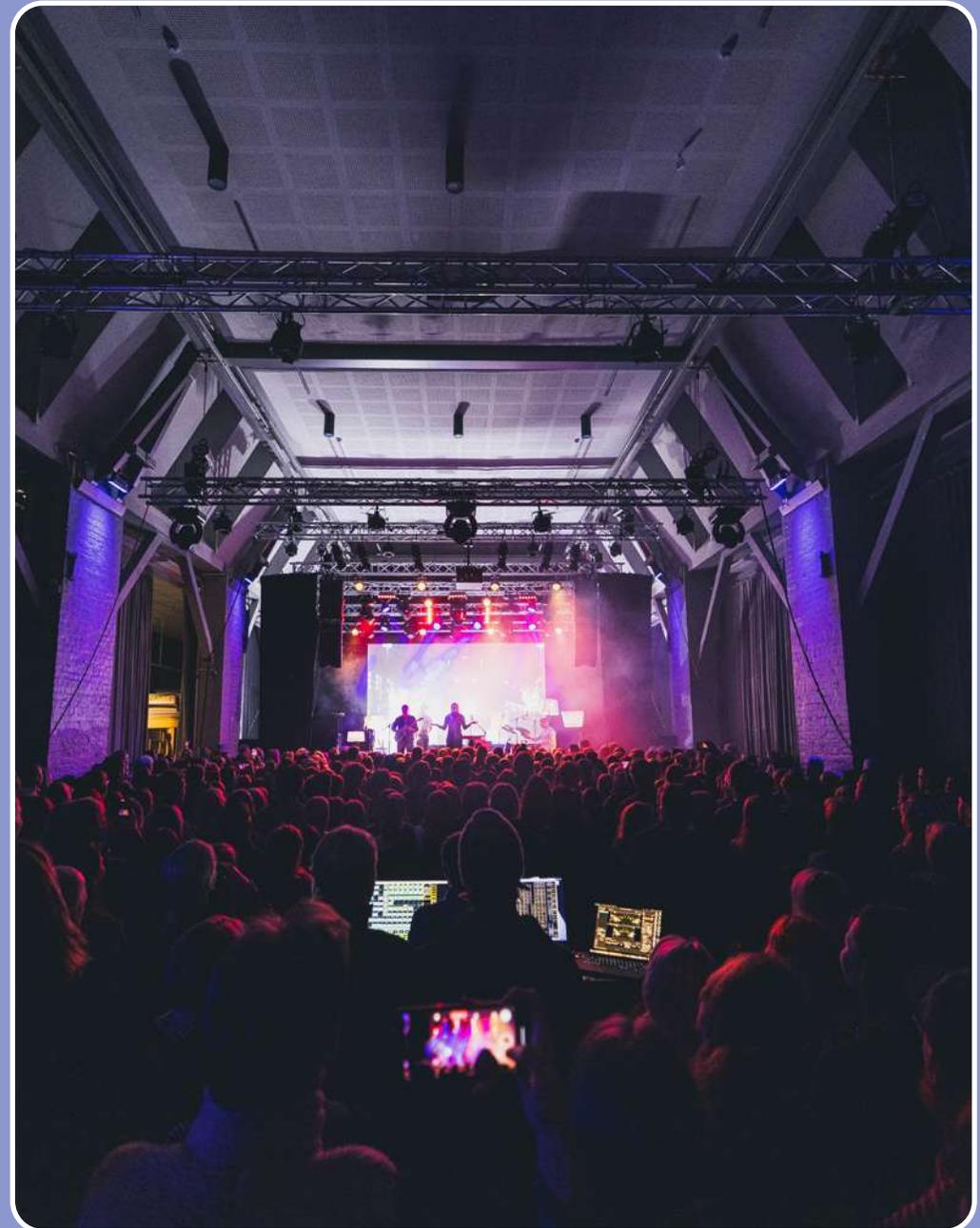
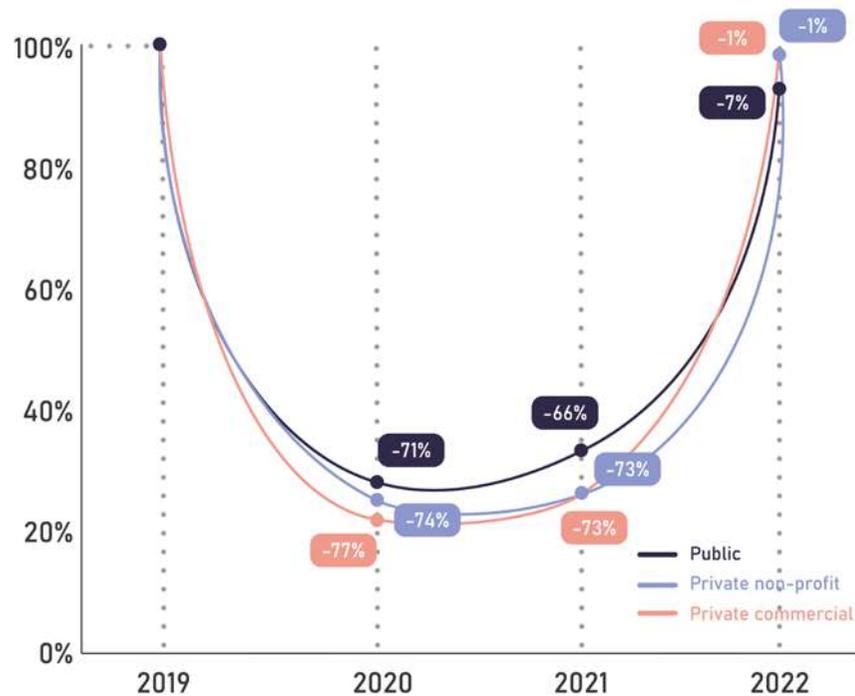
WHAT CAN WE EXPECT IN THE FUTURE OF YOUR VENUE/CLUB?

We anticipate significant changes, and hopefully, stability in both economic and human resources that will enable us to implement a cohesive project for our community, closely connected to the local and regional industry. Despite the challenging context, our goal is to continue developing the project and, if possible, preserve the venue’s legacy for another 30 years!

IMPACT OF COVID ON AUDIENCE VISITS

In 2020 and 2021, government-imposed pandemic restrictions led to a catastrophic decline in audience attendance at Live DMA music venues and clubs compared to 2019. Those music events that did take place were often at a lower capacity due to the restrictions and club nights were often banned. Far fewer people were exposed to live music. This was even worse for private commercial venues (**77%** less visits in 2020), than for private non-profit venues (**74%** decline in 2020) and for public venues (**71%** decline in 2020). Due to the many rescheduled music events in 2022 and people's desire to attend live concerts again, the total number of audience visits in 2022 was almost back to the level of 2019, despite the pandemic restrictions in the first quarter of 2022.

AUDIENCE VISITS



Arppa x Pesso at Korjaamo, Helsinki (FI) © Ramiranta

ONLINE EVENTS AND VIEWS

Music venues developed more online events than ever before in 2020 and 2021. With the restrictive corona measures and the very limited amount of concerts for live audiences, there was a greater need for artists to present themselves online and reach the audience in an alternative way. Online performances were an opportunity for artists to connect with the audience at home.

In 2020, **61%** of the Live DMA music venues and clubs also **organised online music events** (broadcasts and livestreams). In 2021, this was **60%**. There was a great diversity in the number of online events per venue: most venues did fewer than 10 livestreams per year, but some venues did hundreds of livestreams and broadcasts per year. Most livestreams were offered for free to the online audiences, only **2%** of all views were paid views in 2021. After the pandemic restrictions were lifted in 2022, not many venues and clubs continued to offer online content. In 2022 only **22%** of the venues still organised online music events, most of which took place in the first quarter during the pandemic.

An example is the [KeepOn Air streaming platform](#), launched by Live DMA's member KeepOn 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 KeepOn LIVE gain better recognition for live music scenes from their local government.



TAVARA-ASEMA (TAMPERE, FI)

*Portrait of a large private commercial venue
Interview with Janne Laurila (Program Manager)*



© Miikka Varila

CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

Tavara-asema is a venue / event space located in Tampere Finland. Our capacity is 1200 and our main focus is on live music, but we also host business events, night clubs, theme parties etc.

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

In our opening year 2023, we were elected as venue of the year at Music x Media awards and also as the most significant cultural act of the year by the city of Tampere. We have hosted events that have had a positive social impact in the community, such as the very popular K40 disco for people over forty and [KVÄÄR], a nightclub concept for the queer community, as well as putting on very diverse shows in many genres of music.

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

Tavara-asema was opened in 2023 so we were not impacted by the pandemic, but our other venue Tullikamari was closed for long periods of time. Our philosophy during that time was to focus on what was possible, so we organized events under any current restrictions. Our staff was discharged for most of the pandemic, but we provided advice to people on unemployment support etc.

NOW IN 2024, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

Again, Tavara-asema was not opened until 2023 but at Tullikamari we noticed that we had a lack of professionals, both in restaurant work and security after the pandemic. Of course, the pressure of working under the constant changes and insecurity of the pandemic caused a lot of stress to the regular staff, resulting in sick leave and exhaustion. Then again, the comeback to live events was somewhat glorious in our venue – especially the night club was very popular among young adults who had missed out on two years of student parties etc.

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

Inflating costs are a very big challenge to live music business all over, on the other hand it forces promoters and venues to concentrate on local development. For us, as a 1200 capacity venue the challenge is to be able to have interesting shows and events for all kinds of demographics. While it's a positive thing that people between 40 and 70 are now active concert goers, the necessity for higher ticket prices threatens to leave young people out. This is a real concern we need to focus on. We try to keep our programming very diverse and inclusive, it enables us to have the necessary amount of events to keep the place going, it is good for the community and also, inclusivity is good business.

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

With 2025 approaching, we are moving from three rooms (two in Tullikamari, one in Tavara-asema) to just running Tavara-asema, as Tullikamari is going to be renovated. This means Tavara-asema will be even more versatile in its programming. We are doing daytime dance parties for the elderly on Tuesdays, hosting business seminars and private parties and arranging concerts in basically all genres of popular music. The aim is to remain fresh and highly professional, be the trustworthy operator we are known as.

IMPACT OF COVID ON WORKFORCE

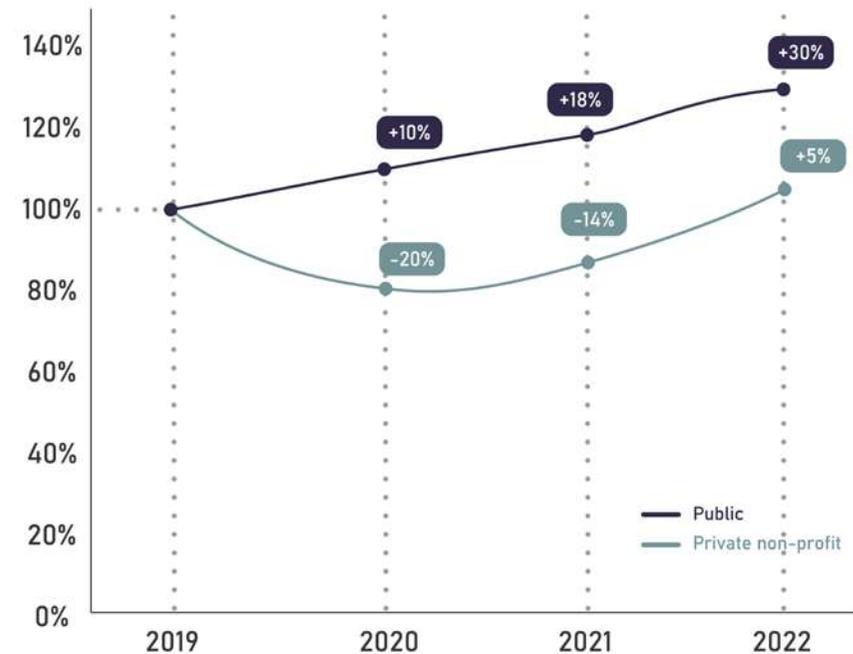
Of course, the pandemic restrictions imposed by the governments from March 2020 to March 2022 also had a big impact on workers in music venues and clubs. Especially for ‘event-related’ functions such as production, technical, and catering, there were far fewer working hours available, due to all the 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 temporary workers, venues could not offer work and wages anymore. For this reason, types of venues with more employed workers, such as public venues, were much less affected by the pandemic restrictions than the type of venues with more volunteers (such as private non-profit venues) and the type of venues with more hired workers (such as private commercial venues).

The fact that employees of **public venues** were largely able to remain employed thanks to COVID support fund for wages explains why working hours in public venues increased by **10%** in 2020, by **18%** in 2021 and by **30%** in 2022.

At the same time, **private non-profit venues** saw a **20%** decrease in working hours in 2020, and a **14%** decrease in working hours in 2021, compared to 2019. After the pandemic restrictions were lifted in 2022, more working hours were available again, partly due to many rescheduled music events, leading to a **5%** increase in working hours in private non-profit venues in 2022, compared to 2019.

This report does not show the workers’ data for **private commercial venues** due to a low empirical base to create representative figures, but looking at the comparison between 2019 and 2020 alone, the data shows a **47%** decrease in working hours for private commercial venues. Private commercial venues have a high proportion of hired paid workers, for whom much less work and funds were available. This particularly affected certain types of functions such as sound and lighting technicians, production staff and catering crew. As a result, many freelancers and temporary workers left the live music sector. This loss of workers and their knowledge and experience (the so-called brain drain) is still a problem in 2024, when this report was written.

WORKING HOURS (FTE)



IMPACT OF COVID ON INCOME AND EXPENDITURE

The pandemic restrictions imposed by governments from March 2020 to March 2022 had a huge impact on the opportunities and incomes of performing artists, (hired) workers and suppliers of live music venues across Europe. This is clearly visible when comparing the venues' financial figures for 2019, 2020, 2021 and 2022.

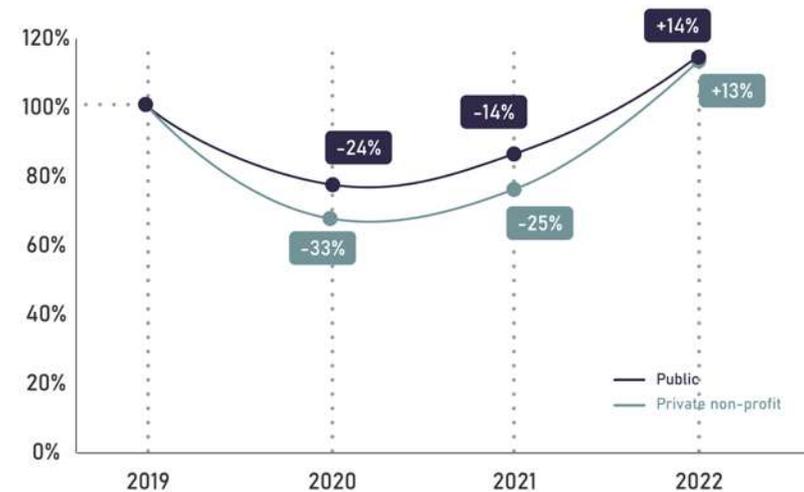
The effects of the pandemic restrictions differed by type of venue. Private commercial venues are almost entirely dependent on income generated by audiences, while most non-profit venues and all public venues could still rely on regular subsidies during the pandemic to cover (part of) their fixed costs.

This report does not show the financial data of **private commercial venues** due to an insufficient empirical base to create representative numbers, but looking at the comparison between 2019 and 2020 alone, the data show a **67%** decrease in total income for private commercial venues. During the same period, private non-profit venues lost **33%** of their total income and public venues lost **24%** of their total income.

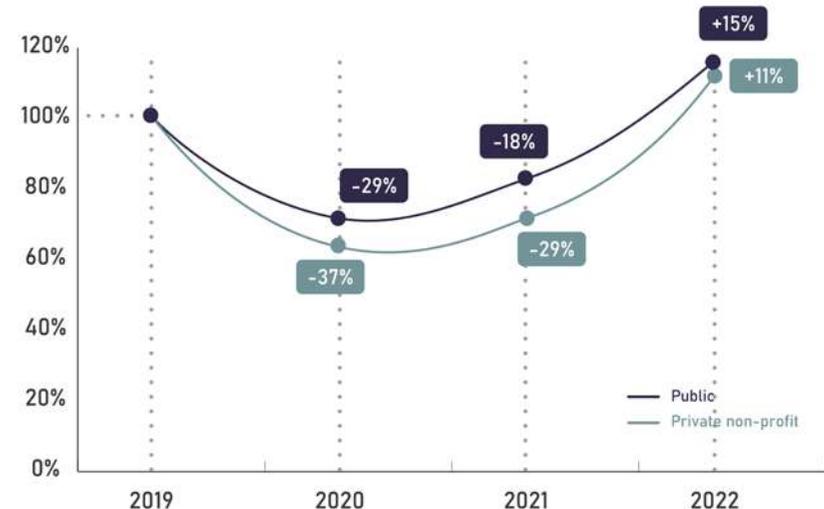


III Considered @ Spiegelberg Festival (CH) © Gilles Mauron

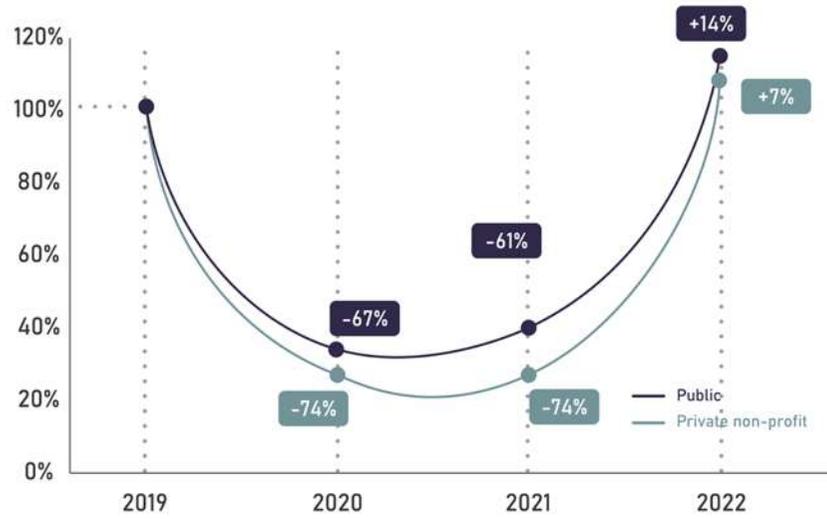
TOTAL INCOME



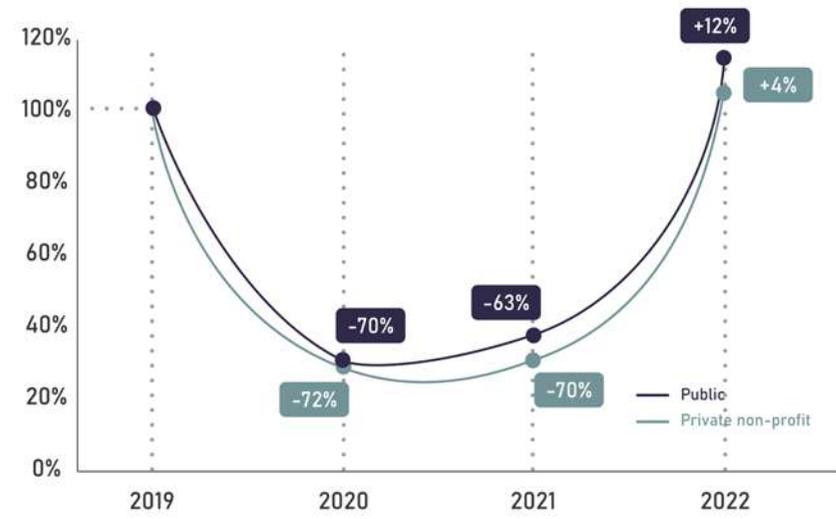
TOTAL EXPENDITURE



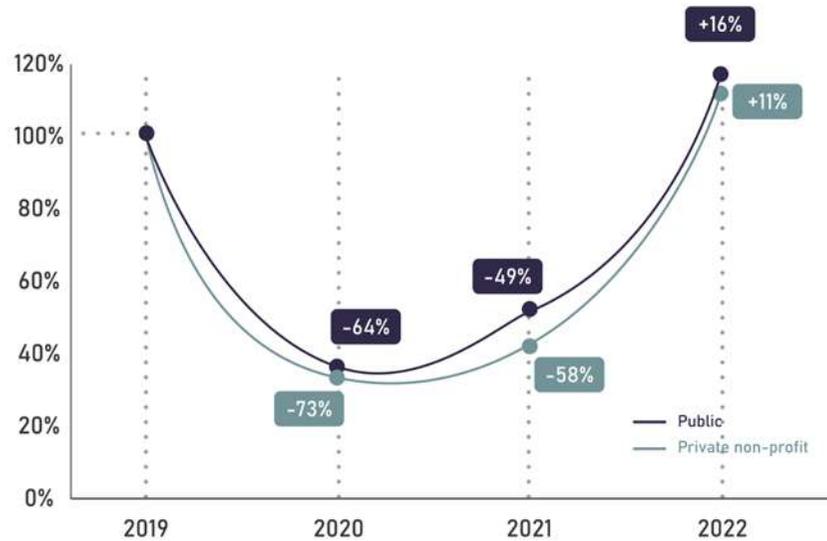
TICKET SALES



FOOD & BEVERAGE SALES



PROGRAMME COSTS



Honningbarna- Folken, Stavanger (NO) - 2022 © Frank Surdal

RAZZMATAZZ (BARCELONA, CAT)

*Portrait of a large private commercial venue
Interview with Lluís Torrents (Co-Director)*



CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

Sala Razzmatazz was founded in 2000 at the city of Barcelona, is one of the biggest venues in Catalonia with 5 different rooms and more than 2000 people capacity. We are promoters too and manage our own clubs every weekend with local and international artists in electronic, urban, R&B, alternative and independent rock and pop music. Moreover, we rent our rooms other promoters and agencies to make their own gigs and events.

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

We are happy to work in music, what we most enjoy and we believe our contribution, as a private company who generate more than 250 paid workers, increase the cultural value of Barcelona, not only for the artist programming in live music, as well as our programming as a nightclub. Moreover, we have an educational commitment and work with different Universities and Schools to improve the quality of new generations of music workers.

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

The impact of the COVID pandemic was absolute, all music venues were closed for approximately two years without any kind of income, all workers needed labor subsidies, all artists had no incomes at all, and companies survived depending of their capacity of bank debt, their personal savings and the work of sector associations who achieved some subsidies from the government.

NOW IN 2024, WHAT ARE STILL REMAINING EFFECTS OF THE PANDEMIC FOR YOUR VENUE/CLUB (OR THE LIVE MUSIC SECTOR)? DID YOU CHANGE YOUR PROGRAMME OR BUSINESS?

After the pandemic, the music sector lived a special good moment talking about incomes and attendance. On the other hand, we had several problems with a lack of music workers who changed sector, and the increase in production costs, and currently we are recovering stability.

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

One of the main sector challenges is the control of ticket prices, the secondary sector, and the dynamic pricing who are inflating tickets and creating an inflation bubble. Besides, in my opinion I guess there will be no future for those who do not invest in sustainability, accessibility, diversity and inclusion in the music sector, and especially in our venue we'll continue betting for our educational program.

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

2025 will be our 25th anniversary, and we are preparing a lot of events in addition of gigs, such as conferences, panels, podcasts, exhibitions, to debate about this lasts 25 years of music sector in Barcelona, and the impact that one venue like us has meant in the cultural life of the city. We are willing to continue working to collaborate to make this city a better place with more music and more opportunities for people who want to enjoy it, and people who want to take part in this music sector too.

COVID SUPPORT FUND

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

COVID support funds from governments were mainly available and aimed at covering fixed costs that venues had committed to, such as housing costs and employees' wages, to prevent job losses 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 industry suppliers who depend on live music events. The lack of support for these actors had a negative effect on the entire live music ecosystem.

In the case of **public** venues **51%** of their income in 2019 was subsidies, while their employment and housing costs together made up **47%** of their total expenses in 2019. This meant that public venues could still cover their fixed costs in 2020 with regular subsidies and needed a relatively small amount of COVID support fund to end the year without a negative financial result. Governments compensated **9%** of public venues' lost income in 2020 and **18%** of lost income in 2021 (compared to income in 2019). This was enough for these venues to survive the pandemic years. In this study and within Live DMA, a very large part of the public venues are located in France.

For **private non-profit venues**, **29%** of lost income was compensated by COVID support money in 2020 and **41%** in 2021, and for most venues this was enough to end both years without negative financial results. However, some venues were forced into reorganisations, meaning they had to cut back and terminate contracts with permanent workers. These venues have a lower share of regular subsidies (**31%** in 2019) than public venues, while their employment and housing costs together made up **43%** of total expenditure in 2019. The larger private non-profit venues in particular are dependent on the audience spending money on tickets and drinks. The figures are mainly based on the Live DMA members with a high share of private non-profit members, mainly venues and clubs in Belgium, the Netherlands, France, and Switzerland.

In this report, the 2021 and 2022 financial data of the **private commercial venues** are not shown due to an insufficient empirical base to provide representative figures, but looking at the comparison between 2019 and 2020 the data shows that for private commercial venues, only **9%** of the lost income in 2020 (compared to income 2019) was covered by COVID support funds from governments. In 2019 only **4%** of their income was subsidies (for many **0%**), while their housing and employment costs represented at least **50%** of their total expenses. Many private commercial venues therefore ended up with negative financial results in 2020 and 2021, in some cases able to draw on their own financial reserves, but often creating financial debts, and some 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.

Apart from the financial impact, almost all venues experienced substantial damage to their main activities, workers, organisations, and other actors in the live music scene. In addition to the COVID support funds from governments, some venues received a small amount of financial support from private foundations, companies, and individuals. Some venues and clubs initiated crowdfunding campaigns, or asked ticket holders to refuse refunds for cancelled shows, but instead donate the ticket value to the venues and/or artists.

WHICH PART OF THE LOST INCOME OF MUSIC VENUES AND CLUBS WAS COVERED BY COVID SUPPORT FUNDS FROM GOVERNMENTS?

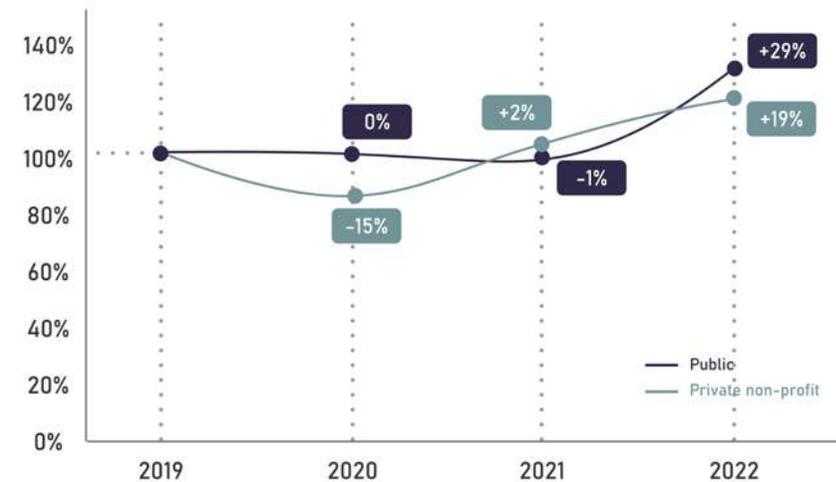
| | PUBLIC | PRIVATE NON-PROFIT |
|-------------|---------------|---------------------------|
| 2020 | 9% | 29% |
| 2021 | 18% | 41% |

2022: RECOVERY FROM COVID AND HIGH INFLATION

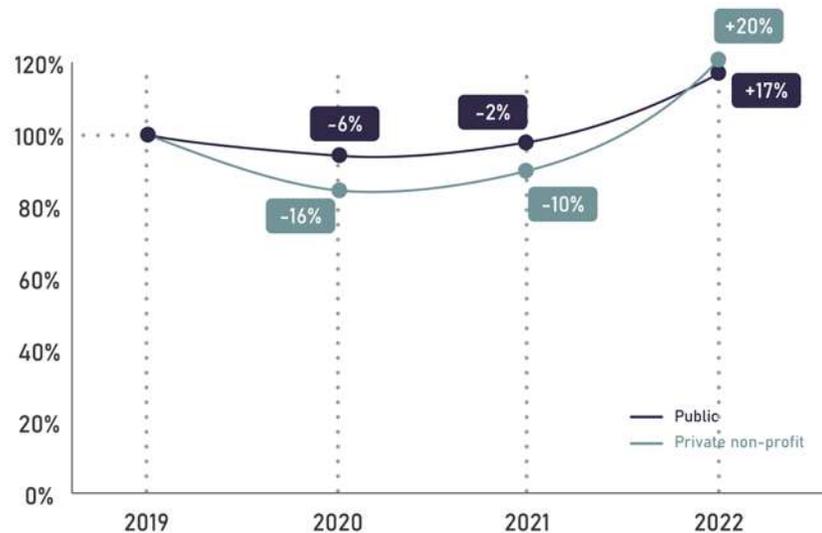
Even before crises like COVID and inflation, the financial situation of live music venues and clubs was already fragile as they rely heavily on audience spending, subsidies, volunteer work and rules and regulations to survive. The pandemic left many (especially private commercial venues and clubs) in an even weaker financial position in the spring of 2022, for example with fewer financial reserves or debts, and more uncertainty about their income from subsidies and ticket sales. In many cities in Europe, external factors such as gentrification, noise regulations, neighbours' complaints and increasing costs further weaken this fragile situation.

In 2022, due to high inflation in most European regions, venues were confronted with rapidly increasing costs for energy, but also for their accommodation, (hired) workers, programming and food and beverage purchases. The figures show that housing costs and employment costs increased faster in 2022 than income from subsidies, ticket sales and food and beverage sales. More venues had negative financial results than in 2019 and were forced to cut back on staff and programming.

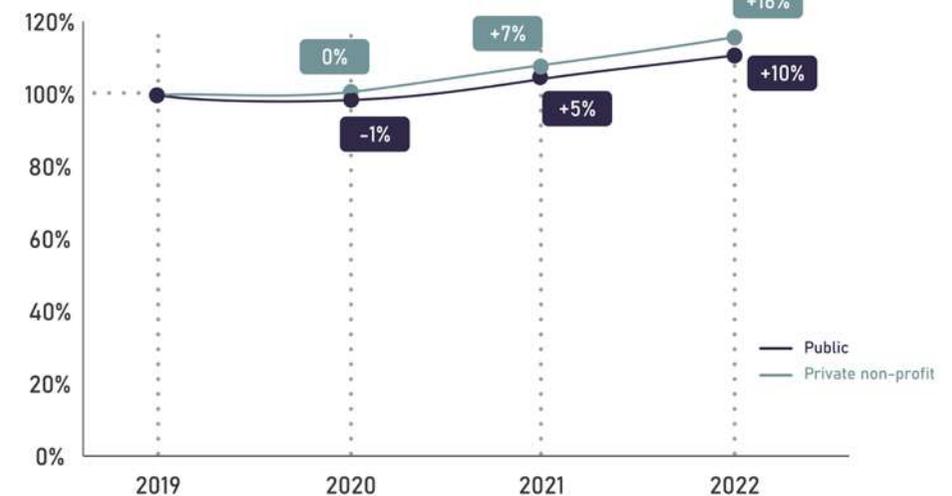
HOUSING COSTS



EMPLOYMENT COSTS



SUBSIDIES



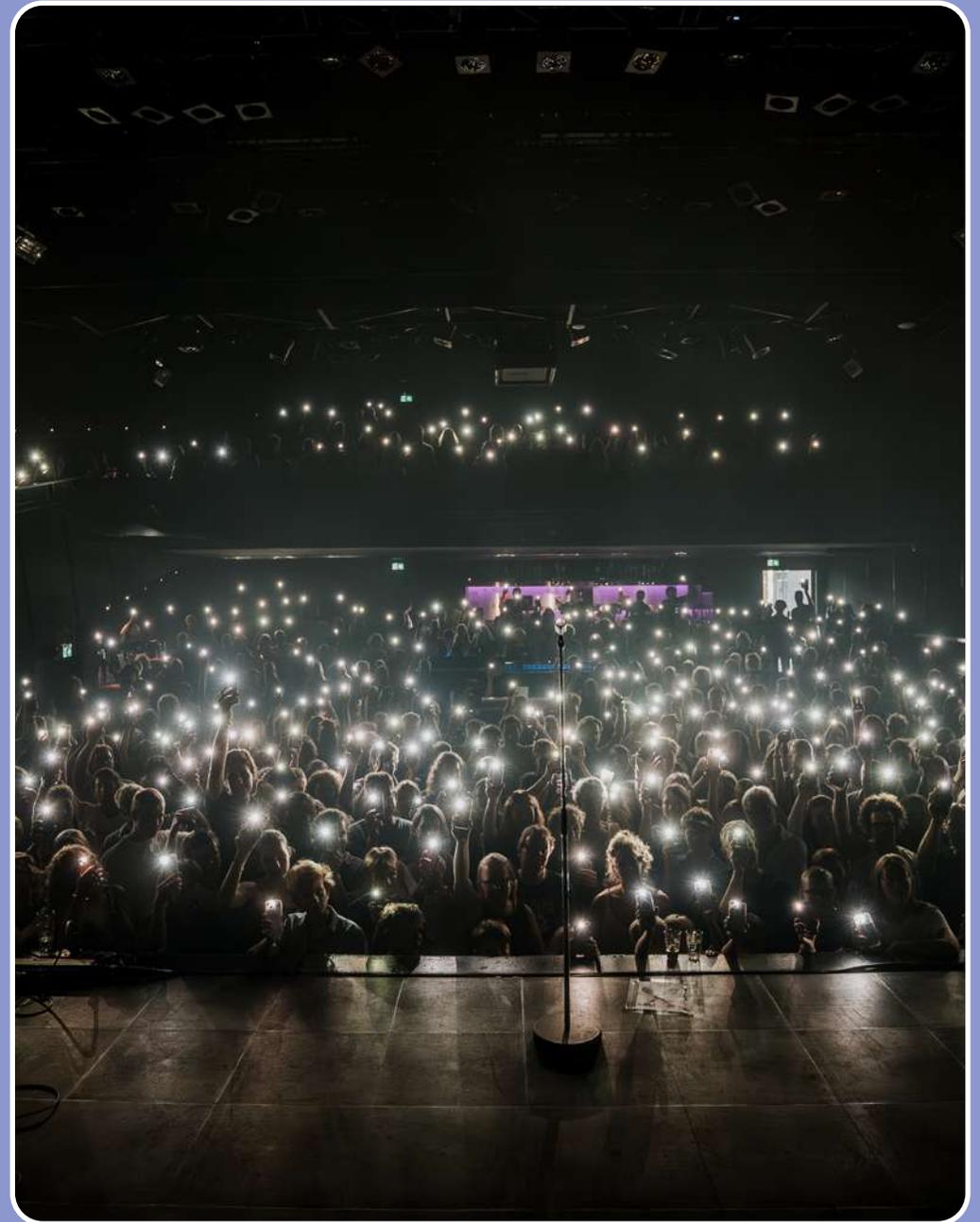
VIEW OF 2023 AND 2024

From March 2020 to March 2022, the business of music venues and clubs was dominated by pandemic restrictions imposed by governments. The rest of 2022 was marked not only by rescheduled concerts and the return of live audiences, but also by high inflation in most European regions, and thus sharply rising costs for music venues and clubs. These increasing costs have also affected the business model of venues and clubs into 2023 and 2024.

Although venues' data for 2023 and 2024 are not yet available in most countries, the available data (for example '[VNPf Dutch Music Venues Facts & Figures 2023](#)') and input from members in the Live DMA network, point out that most expenses for venues and clubs increased dramatically, such as housing and energy costs, employment costs, food and beverage purchases, and programme costs. The big challenge for venues and clubs is to create at least the same increase in total income, to be able to continue to organize the same number and diversity of music events, to keep workers on the payroll and not to end the year with financial deficits. Venues and clubs only partially succeed in this. For many non-profit venues and clubs that receive subsidies from municipalities and/or from regional and national governments, the subsidies were not indexed in line with inflation. This means that rising operating costs, such as housing costs and employment costs, can no longer be covered unless the audience would spend much more money at the venues and clubs. Private commercial venues that receive no or very low amounts of subsidies are completely dependent on the (increase in) income generated by the audience. Because the audience does not spend that much more money, many venues and clubs faced more financial problems and negative results in 2023, with an uncertain outlook for 2024.

To avoid financial deficits, venues and clubs are often forced to cut back on programming emerging talents and music genres that attract smaller audiences. As most venues and clubs in the Live DMA network have talent development and diversity as one of their main objectives, inflation and the lack of subsidies negatively impact the extent to which they can fulfil their mission. Moreover, this also has a negative effect on emerging artists, the workforce and the entire live music ecosystem.

Earlier in 2024, Live DMA set out a list of [10 recommendations](#) for policy makers in Europe, addressing the main challenges for music venues and clubs.



ROTOWN (ROTTERDAM, NL)

*Portrait of a small private non-profit venue
Interview with Minke Weeda (Director)*



© Guus van der Aa

CAN YOU BRIEFLY INTRODUCE YOUR VENUE/CLUB?

Rotown is a concert promoter that operates in Rotterdam. Our homebase is a 250 capacity venue, but we also promote roughly 200 shows yearly in other venues in our city with capacities varying from 100 to 2,000. We're not too fussy about genres; we'll do anything you could classify as pop music.

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

We're extremely proud of our Left of the Dial festival. Since 2018, we're organizing this festival annually to showcase the best new artists. Three days, 22 stages and 280 shows by relatively unknown acts that we believe best represent the current state of alternative music. It fills us with a great sense of optimism that, despite having no headliners, last edition was completely sold out with 4,000 ticketholders daily. Apparently there are still plenty of people out there who love discovering new music.

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

Those dark pandemic days seem like ages ago, but looking back, I'd say that staying mentally sane while we couldn't do our usual jobs was the most challenging. We were so used to being surrounded by people and live music that the sudden silence was sometimes unbearable. But all in all we managed quite well. We've learned new skills and found all kinds of ways to stay connected to our regular ticket buyers. And we got to catch up on some sleep, which was not a bad thing at all in retrospect.

NOW IN 2024, 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 the pandemic ended, we pretty much went back to normal. I remember people saying that COVID would forever change the way we consume music and that online gigs were going to play an important role in our lives. We never believed any of that. Our business model is connecting artists and their -potential- fans, preferably in a small sweaty club. No online concert could ever compete with that experience.

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

Obviously, the rise of costs of basically everything is pretty worrisome. You want everybody to get paid fairly, but you also want to keep tickets as affordable as possible. We're still figuring out how to navigate the situation, because the last thing we want is for live music to become an elitist product. Gigs should be accessible to everyone.

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

No big surprises here. We'll continue to enthusiastically promote shows all year round and each October we'll organize Left of the Dial. We're dead set on turning it into the best and biggest showcase festival in the whole wide world. In all honesty, if we'd actually manage to make that happen, it would be a HUGE surprise - mostly to ourselves...

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

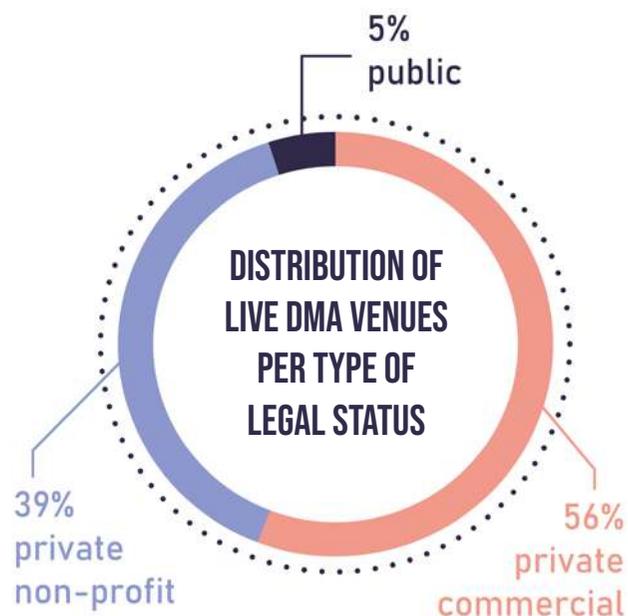
The expenditure of music venues and clubs consists mostly of programme costs such as artists' fees, and employment costs such as wages for workers.

€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:

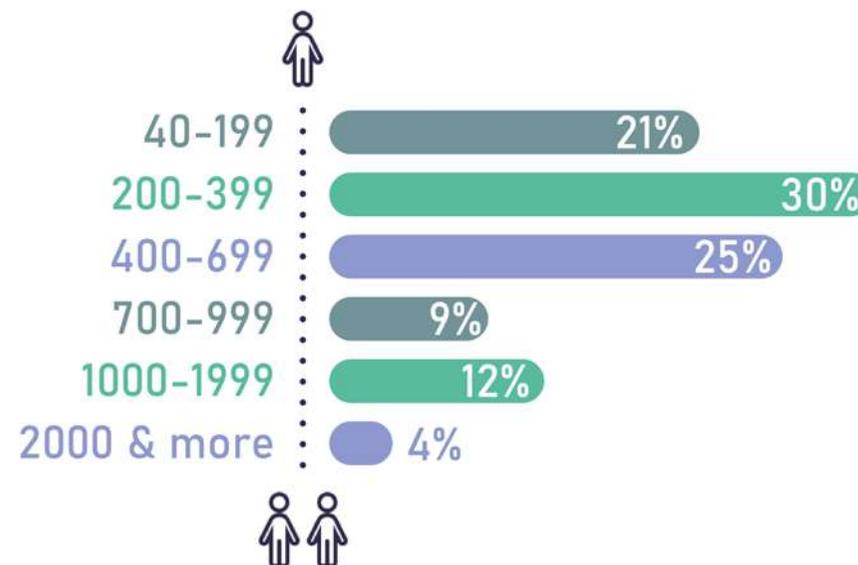


5% are **public organisations**, such as public bodies and local authorities.
39% are **private non-profit organisations**, such as associations and foundations.
56% are **private commercial structures**, such as (limited) companies and partnerships.

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.

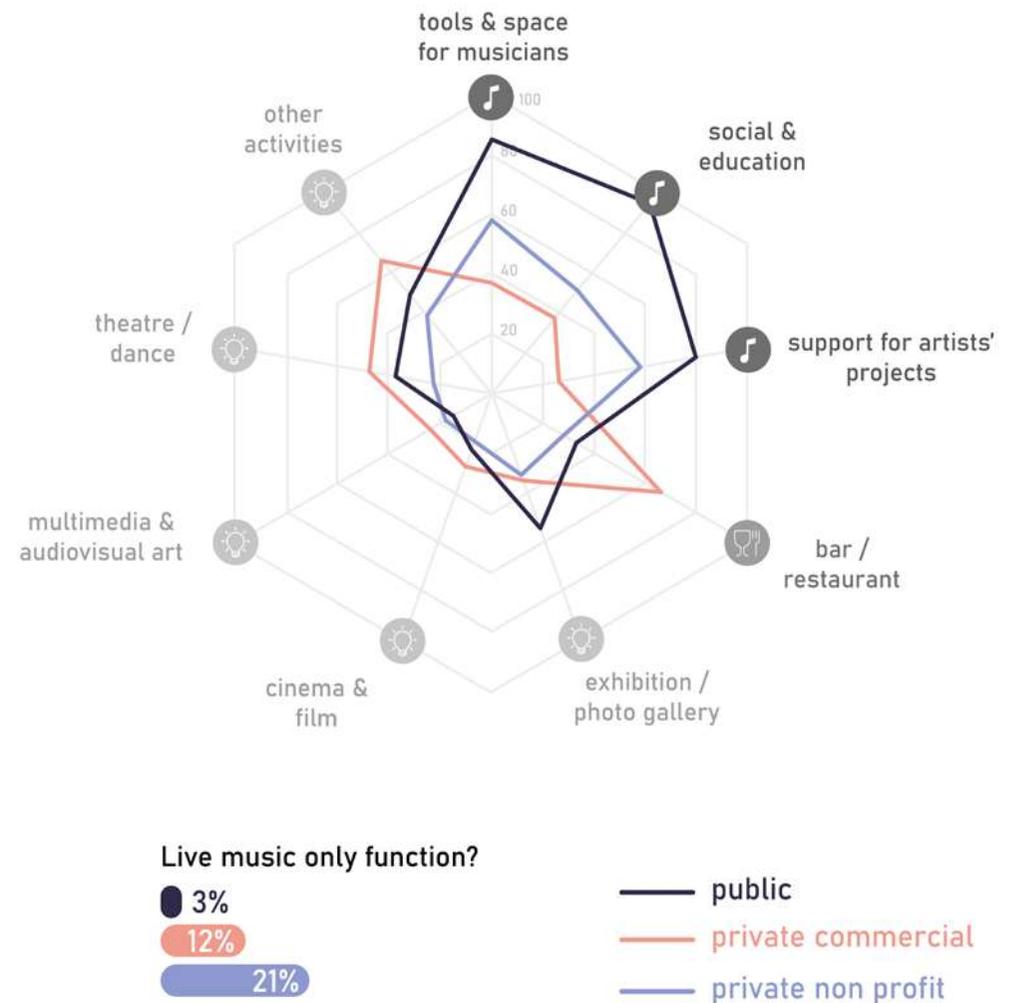
Looking at functions of venues with a different type of legal status, we see that especially public venues have almost never solely a live music function. Most of them have social and educational functions, with tools, spaces and/or support for artists' (projects). For private commercial venues a common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

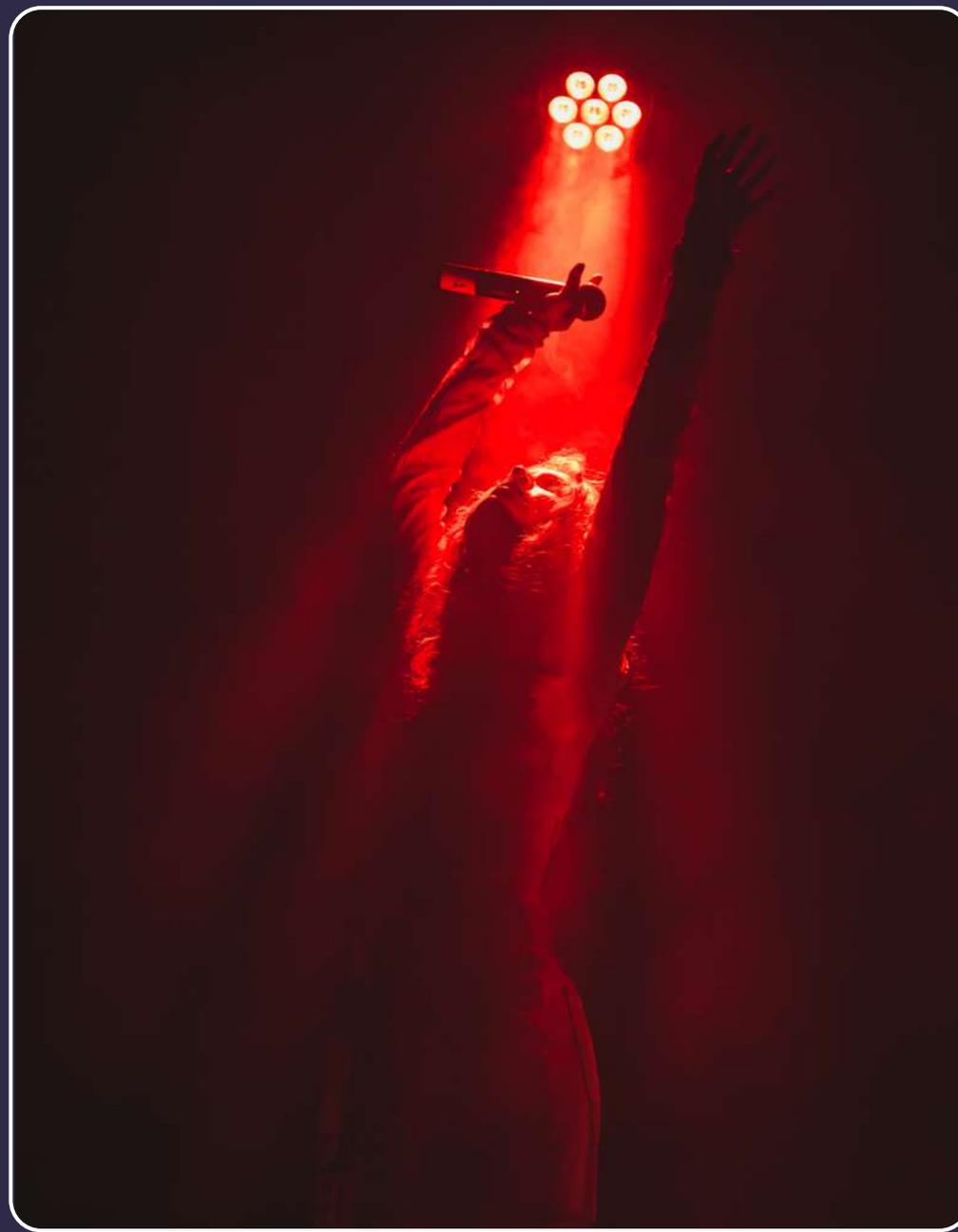
With a focus on talent development, music venues often present additional artist performances during music events, such as support acts, or a line-up of multiple artists during indoor festivals and club nights. **47%** of all music venues also **organised festivals** in 2019, especially private non-profit 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.



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**.



La Cordo, Romans sur Isère (France) © Angelina Lombardo

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

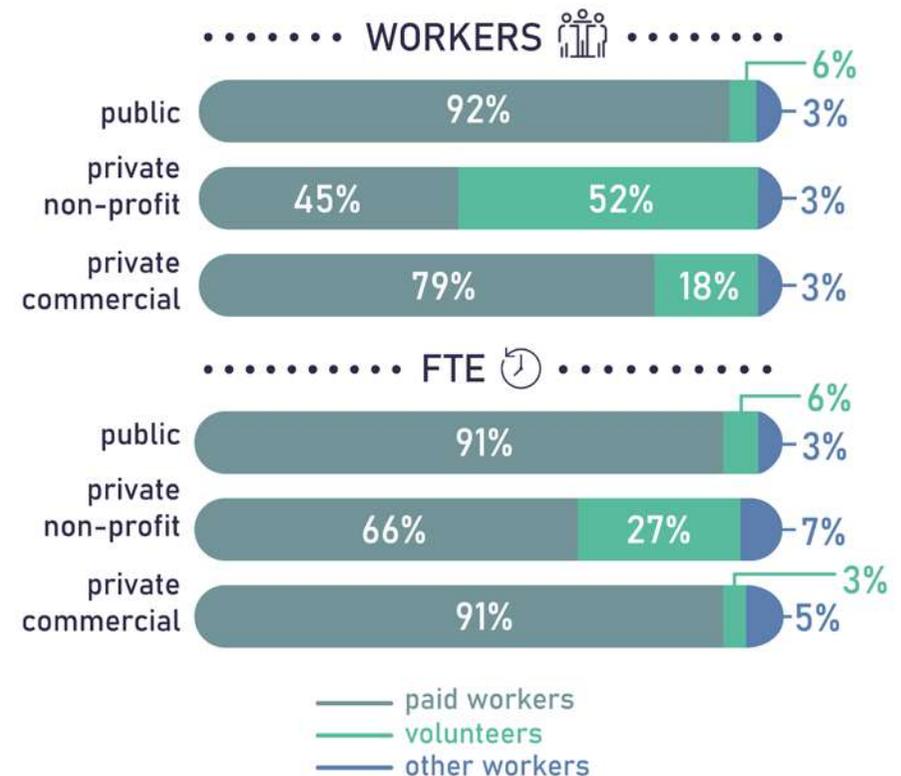


In 2019, **55%** of all workers were **paid professionals**, responsible for **77%** of all **working hours**. The **volunteers** involved (**41%** of all workers), work much less hours (3,3 hours per week) on average than paid workers (11,9 hours per week) and therefore did **16% of all the work**. 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 26](#)) 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

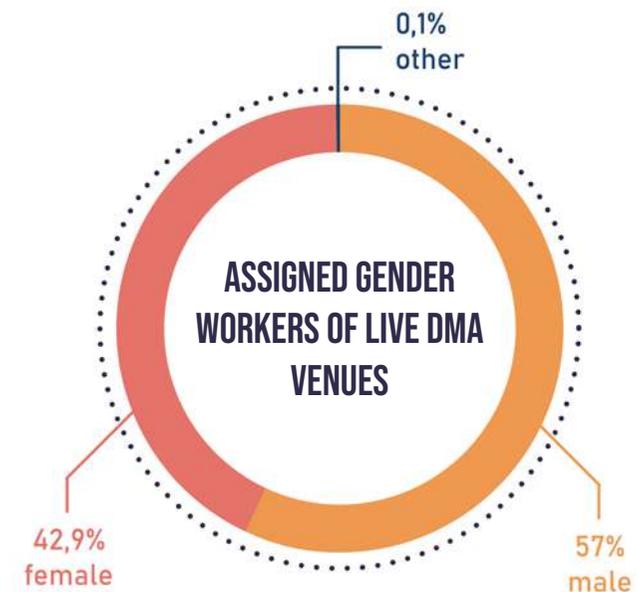
WORKER'S ASSIGNED GENDER

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

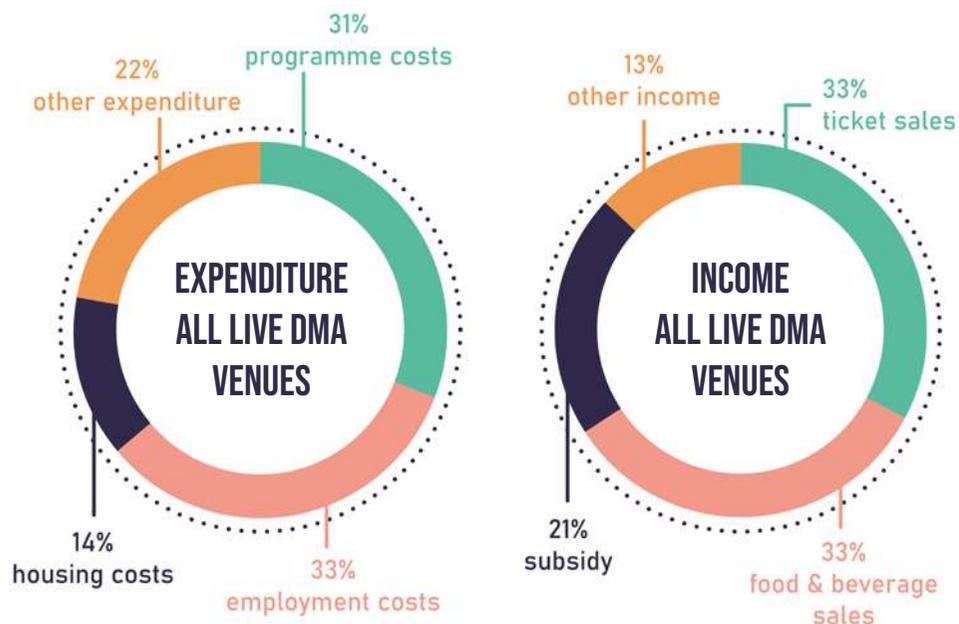
idea of the gender balance of workers in music venues and clubs in 2019. These results are based on available data (22% of all Live DMA venues) from venues and clubs in Belgium, Estonia, Finland, France, Italy, The Netherlands, Switzerland, and Spain.

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

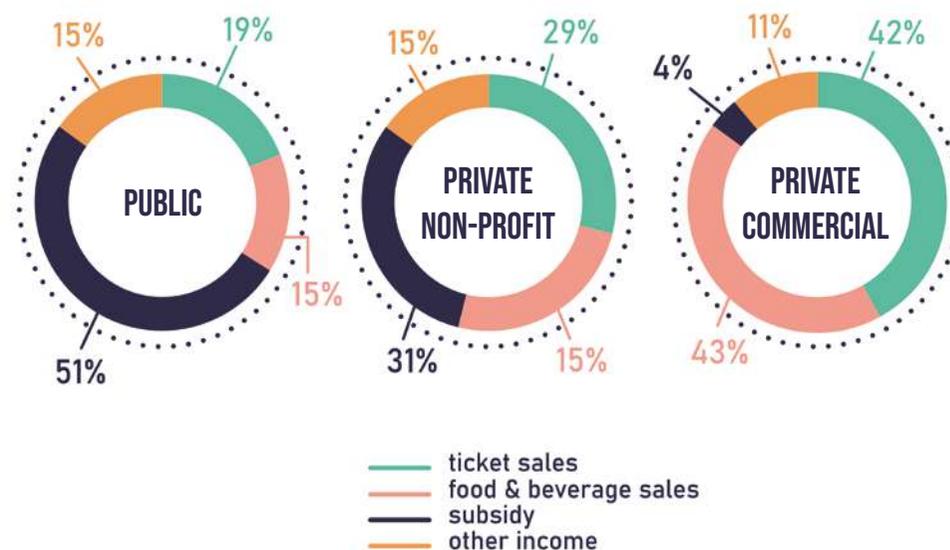


In 2019, of all **expenditure** of Live DMA music venues across Europe, **31%** was spent on **programme costs**, **33%** on **employment costs**, and **14%** on **housing costs**. The music venues' expenditure is quite similar for different types of venues (smaller and larger, non-profit, and commercial),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

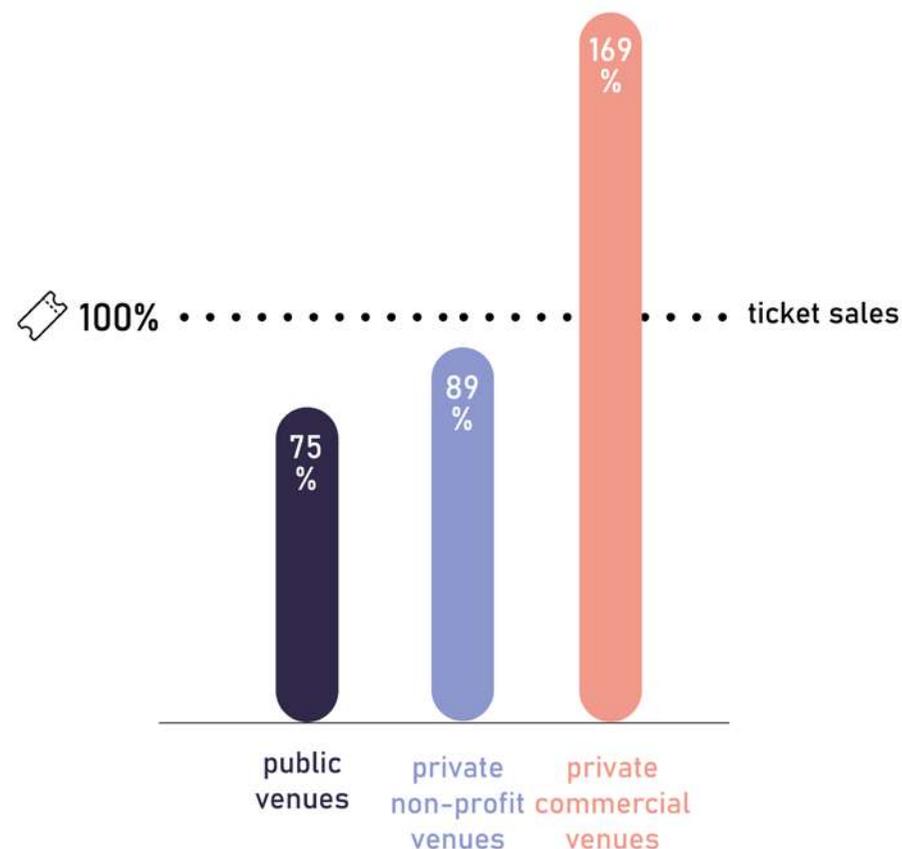
Non-profit organisations often get financial support from local or national governments as a recognition for their general interest mission and for supporting their work in programming diverse music genres and artists that are still at the beginning of their careers. Those subsidies can be structural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



Members' figures



IMPACT OF COVID RESTRICTIONS & INFLATION

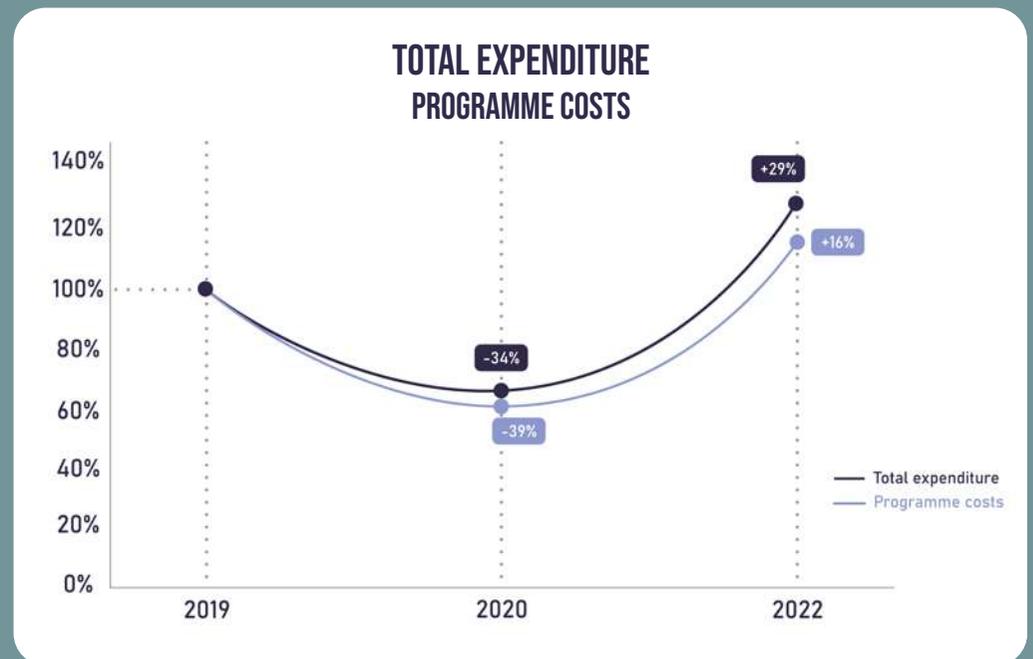
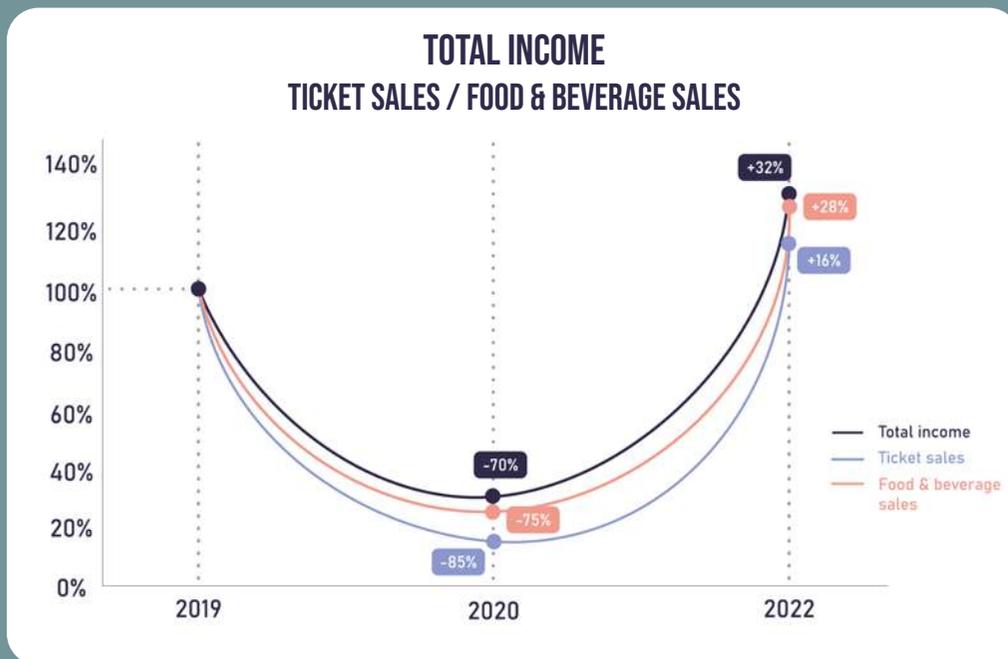
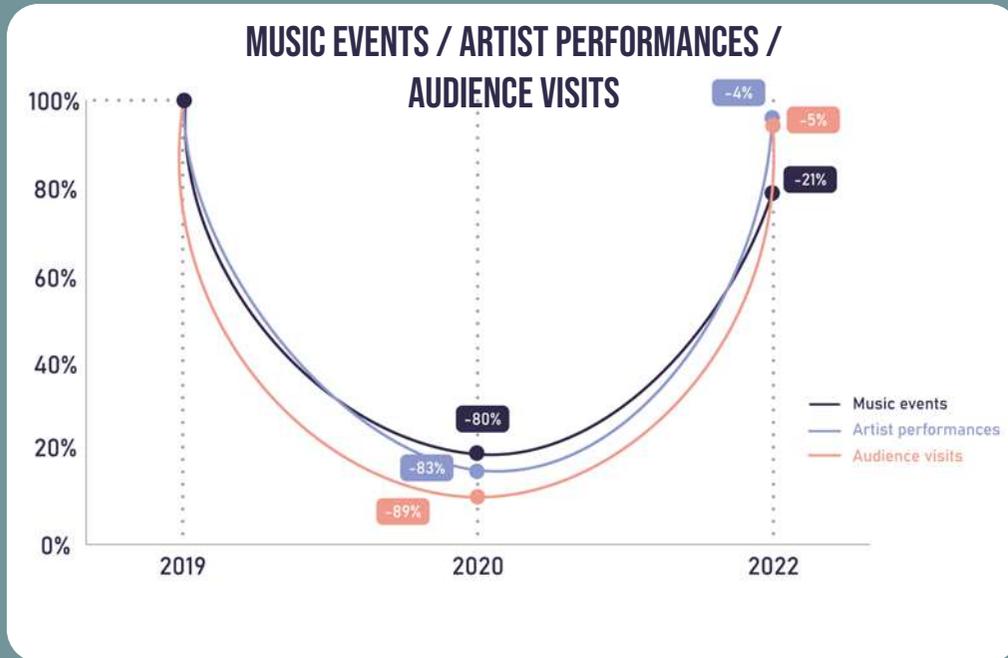
The government-imposed pandemic restrictions had a significant impact on the opportunities and income of performing artists, (hired) workers and suppliers for ACCES live music venues in Spain. Especially since most venues are small private commercial structures, they rely mainly on income generated by the audience, such as ticket sales and food and beverage sales. While music events, visits and ticket sales fell by more than **80%** during the pandemic, many costs remained, leaving venues facing financial difficulties.

The government provided COVID support funds to ACCES venues in 2020 and 2021, but this covered only **9%** of the lost income (2020 compared to 2019). In addition, the Spanish government offered wage support directly to part of the workforce of the ACCES venues. Thanks to these support schemes, most jobs were preserved, and most venues were able to survive.

After the pandemic restrictions were lifted in 2022, the number of music events, visits, ticket sales and food and beverage sales began to recover. However, in the same period, high inflation led to sharply increasing expenditure for venues and clubs, such as costs for staff, housing, energy, programming and food and beverage purchases. As a result, financial challenges continue into 2023 and 2024.

Based on comparison data 2019-2022 of 7 ACCES music venues, collected during 2020-2024.

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

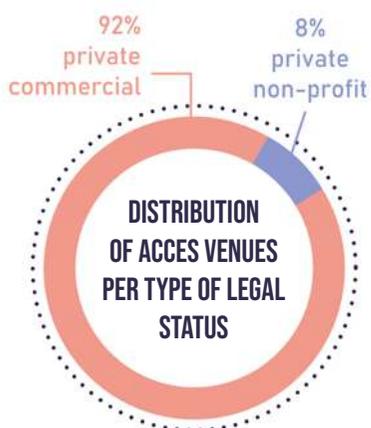




2019 OVERVIEW ACCES VENUES & CLUBS (SPAIN)

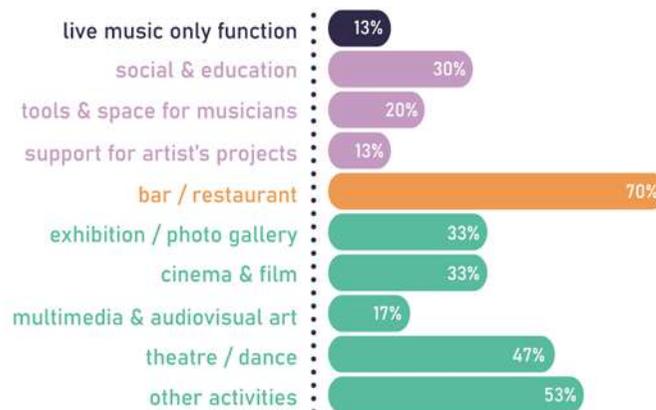
These figures represent 115 live music venues and clubs in Spain (excluding regions Catalonia and Basque Country) which are part of the association ACCES.

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**.

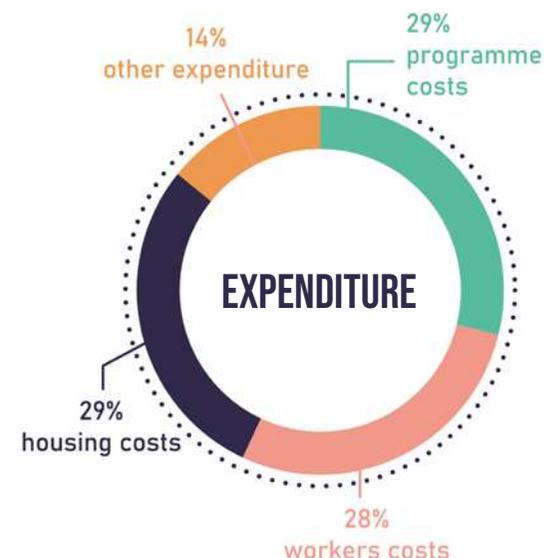
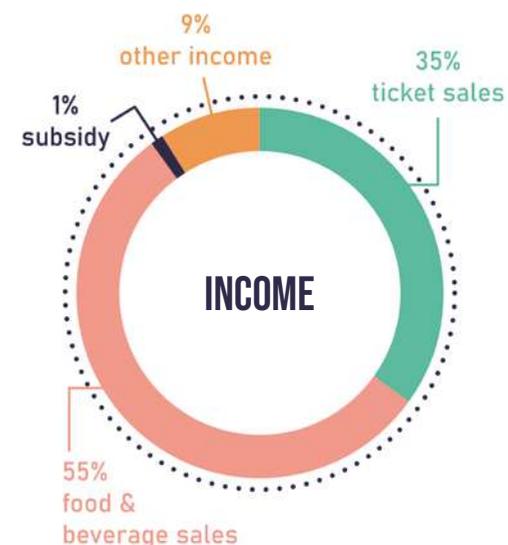
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

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%)**.

2019-2020 OVERVIEW OF ASACC VENUES AND CLUBS (CATALUÑA, SPAIN)



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

2020 OVERVIEW ASACC VENUES & CLUBS (CATALONIA)

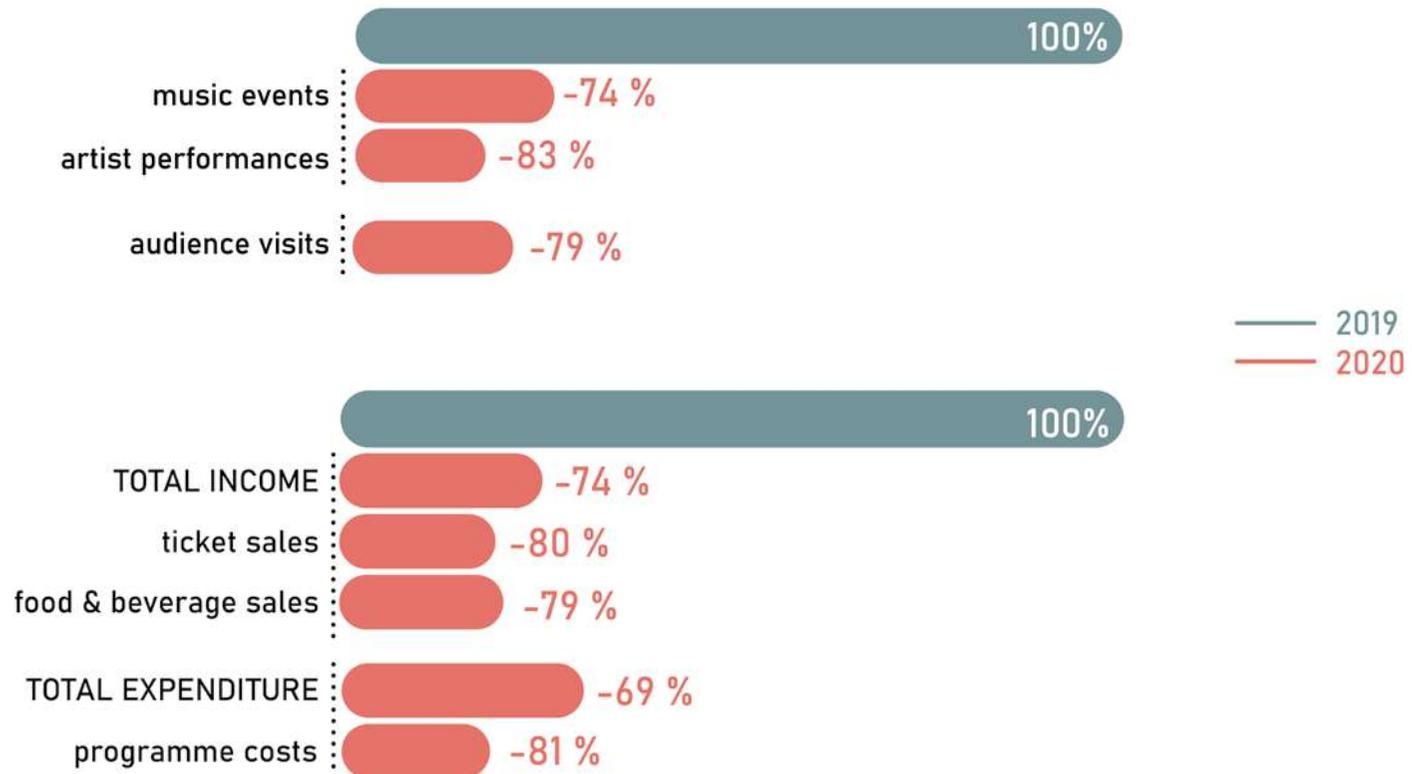
Based on compared data (year 2019+2020) of 29 ASACC music venues, collected during 2020-2022.

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.

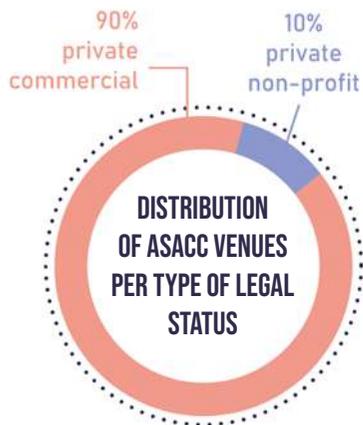
The government provided COVID support fund to the ASACC venues in 2020, but this **covered only 4% of the lost income** (2020 compared to 2019) of the music venues. In addition the Catalanian government paid COVID support fund for employees' wages directly to part of the workforce of the ASACC venues.



2019 OVERVIEW ASACC VENUES & CLUBS (CATALONIA)

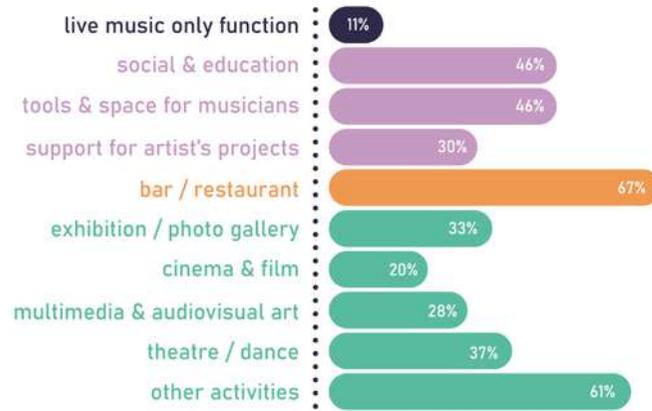
These figures represent 76 live music venues and clubs in the region Catalonia in Spain, which are part of the association ASACC.

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.

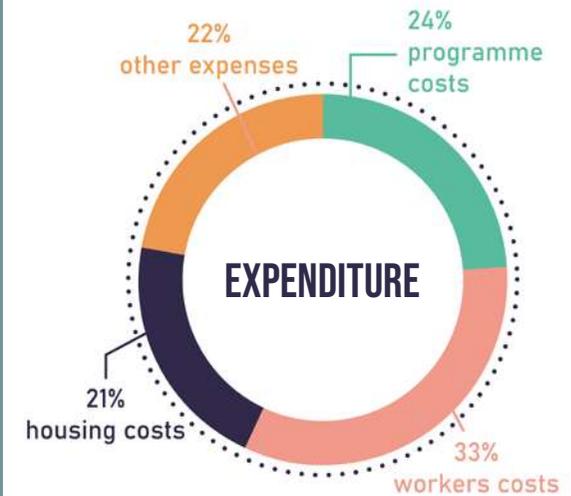
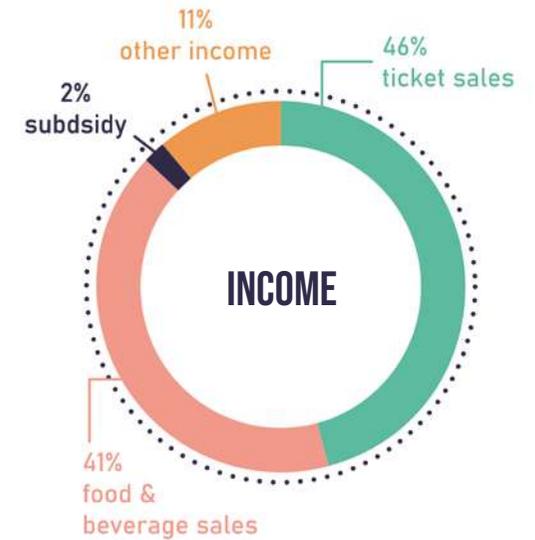
46% of all ASACC music venues also **organised festivals** in 2019.

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%)**.



IMPACT OF COVID RESTRICTIONS & INFLATION

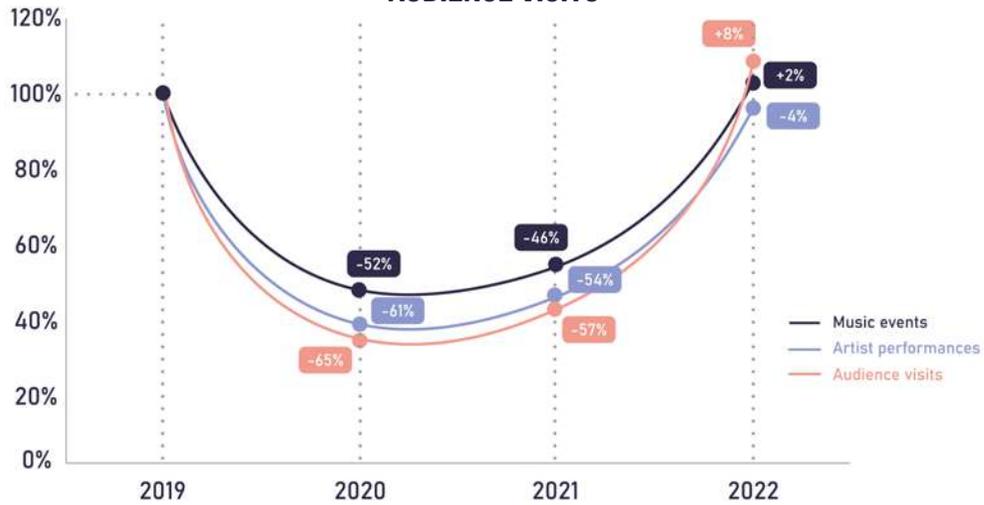
The government-imposed pandemic restrictions had a significant impact on the opportunities and income of performing artists, (hired) workers and suppliers for Clubcircuit live music venues in Belgium. During the pandemic, music events dropped by more than **50%**, visits and ticket sales fell by more than **60%**, putting most venues in financial difficulties.

As all Clubcircuit venues are private non-profit structures, they were still able to rely on regular subsidies to cover (some of) their fixed costs. Also, the government provided COVID support funds to Clubcircuit venues in 2020 and 2021, but this covered only **3%** of the lost income in 2020 and **5%** in 2021 (compared to 2019). In addition, the government and trade unions offered wage support directly to part of the workforce of the Clubcircuit venues. Thanks to these support schemes, most jobs were preserved, and venues were able to survive.

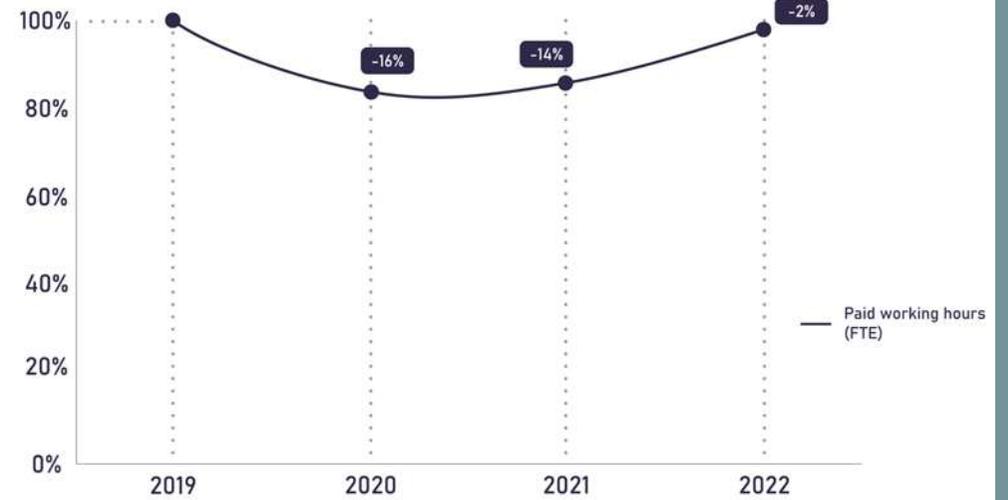
After the pandemic restrictions were lifted in 2022, the number of music events, visits, ticket sales and food and beverage sales began to recover. However, in the same period, high inflation led to sharply increasing expenditure for venues and clubs, such as costs for staff, housing, energy, programming and food and beverage purchases. As a result, financial challenges continue into 2023 and 2024.

Based on comparison data 2019-2022 of 10 Clubcircuit music venues, collected during 2020-2024.
 To learn more about these venues visit clubcircuit.be and/or contact Clubcircuit Survey coordinator Marc Steens, info@clubcircuit.be

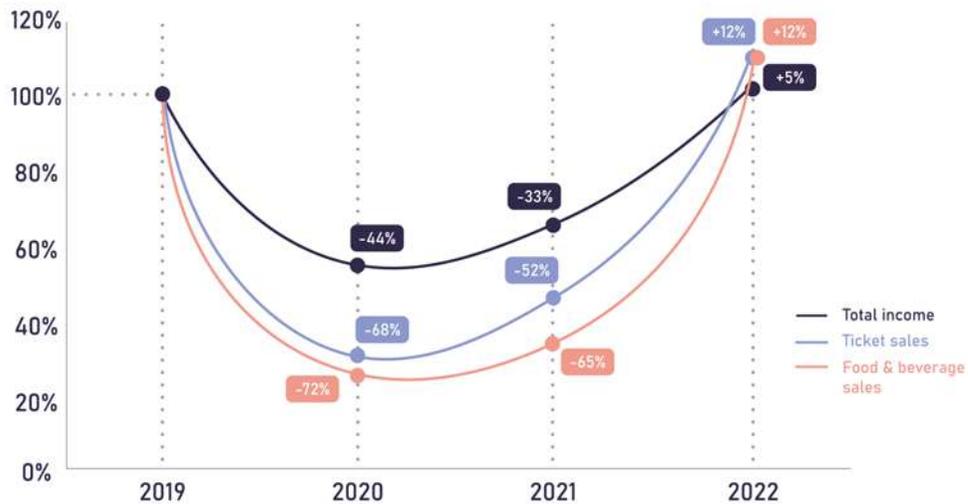
MUSIC EVENTS / ARTIST PERFORMANCES / AUDIENCE VISITS



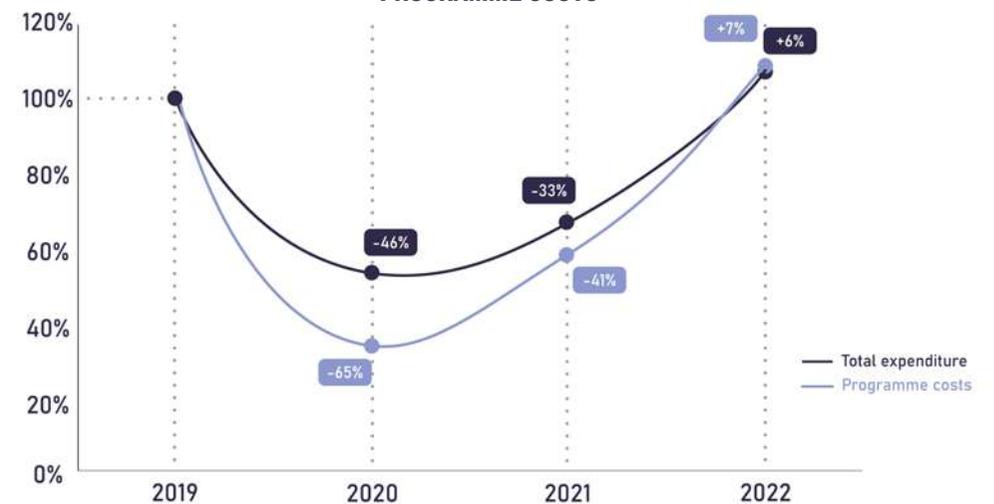
PAID WORKING HOURS (FTE)



TOTAL INCOME TICKET SALES / FOOD & BEVERAGE SALES



TOTAL EXPENDITURE PROGRAMME COSTS



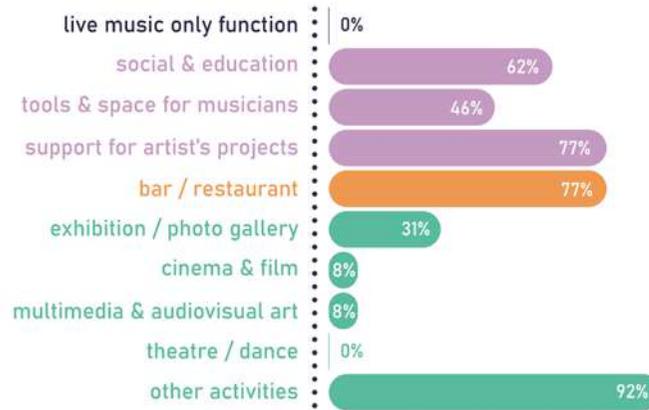


2019 OVERVIEW CLUBCIRCUIT VENUES & CLUBS (FLANDERS, BELGIUM)

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.

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS

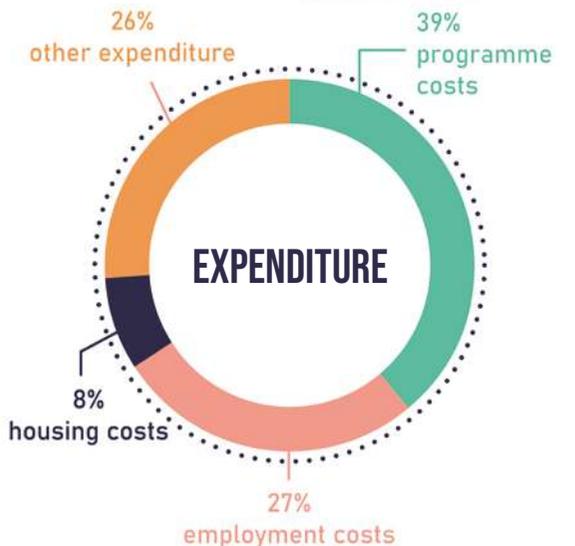
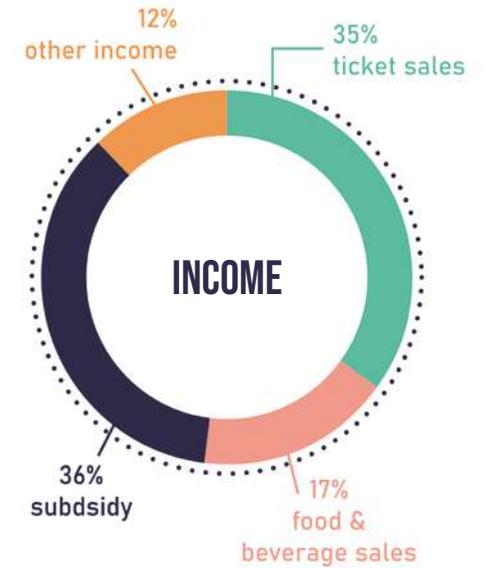


In 2019, Clubcircuit music venues had a **median audience capacity of 600**.

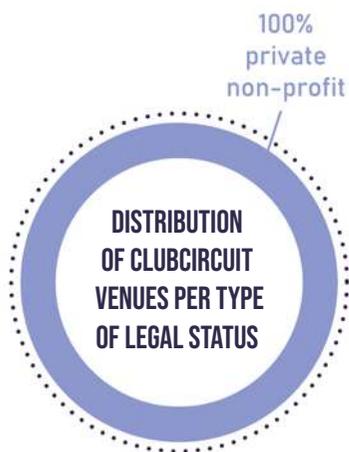
The network's venues presented almost **2,700 artist performances**, which attracted well over **450,000 visits**.

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.



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%)**.



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

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**.

2019–2022 OVERVIEW OF COURT-CIRCUIT VENUES AND CLUBS (WALLONIA, BELGIUM)



IMPACT OF COVID RESTRICTIONS & INFLATION

The government-imposed pandemic restrictions had a significant impact on the opportunities and income of performing artists, (hired) workers and suppliers for Court-Circuit live music venues in Belgium. During the pandemic music events dropped over **60%**, and visits and ticket sales went down over **70%**, putting most venues in financial difficulties.

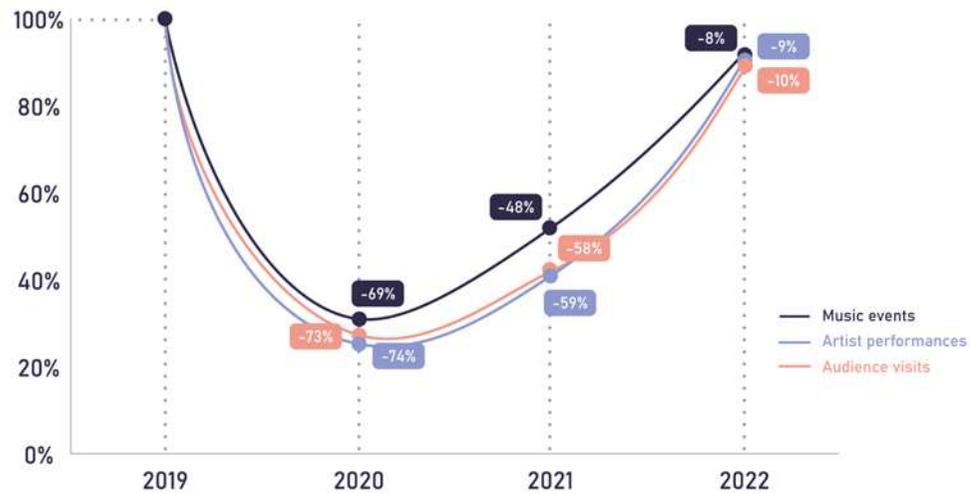
The private non-profit venues of Court-Circuit could still rely on regular subsidies to cover (some of) their fixed costs. Also, the government provided COVID support funds to Court-Circuit venues in 2020 and 2021, but this covered only **26%** of the lost income in 2020 and **41%** in 2021 (compared to 2019). In addition, the government and trade unions offered wage support directly to part of the workforce of the Court-Circuit venues. Thanks to these support schemes, most jobs were preserved, and venues were able to survive.

After the pandemic restrictions were lifted in 2022, the number of music events, visits, ticket sales and food and beverage sales began to recover. However, in the same period, high inflation led to sharply increasing expenditure for venues and clubs, such as costs for staff, housing, energy, programming and food and beverage purchases. As a result, financial challenges continue into 2023 and 2024.

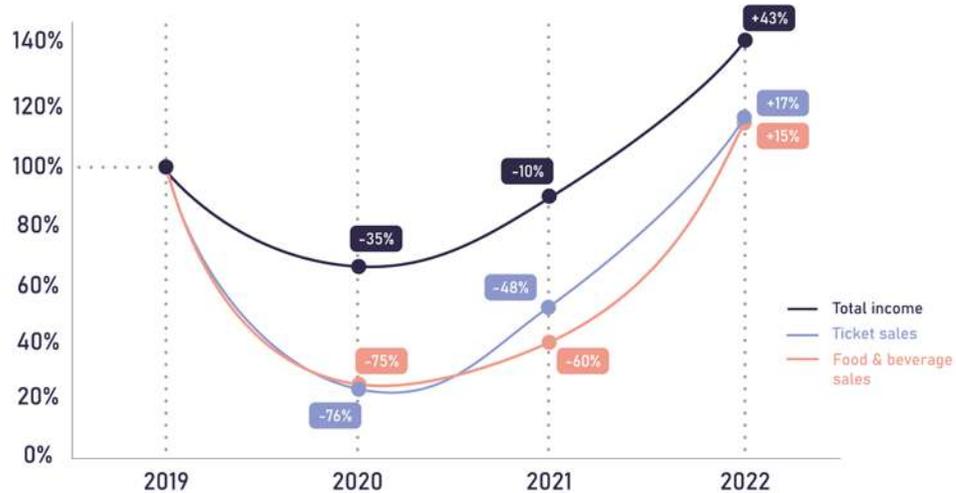
Based on comparison data 2019-2022 of 27 Court-Circuit music venues, collected during 2020-2024.

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

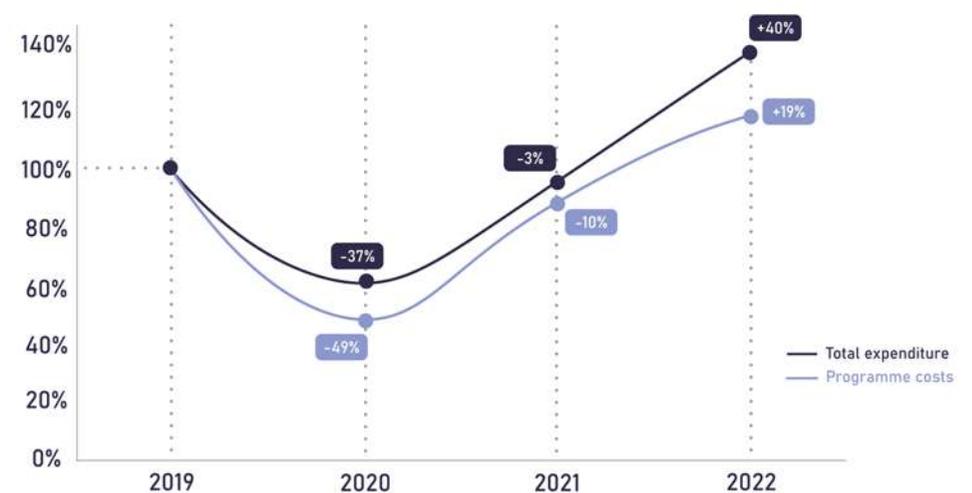
MUSIC EVENTS / ARTIST PERFORMANCES / AUDIENCE VISITS



TOTAL INCOME TICKET SALES / FOOD & BEVERAGE SALES



TOTAL EXPENDITURE PROGRAMME COSTS



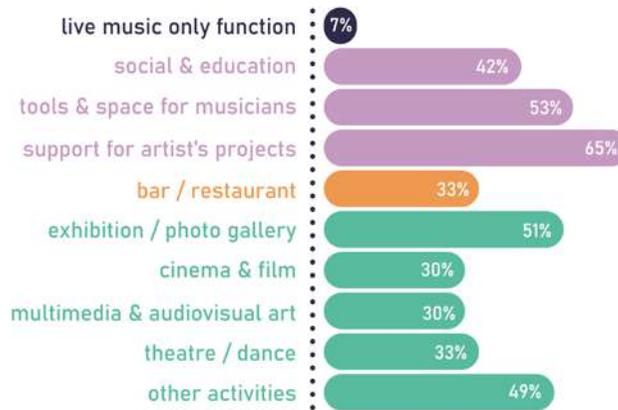


2019 OVERVIEW COURT-CIRCUIT VENUES & CLUBS (WALLONIA, BELGIUM)

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.

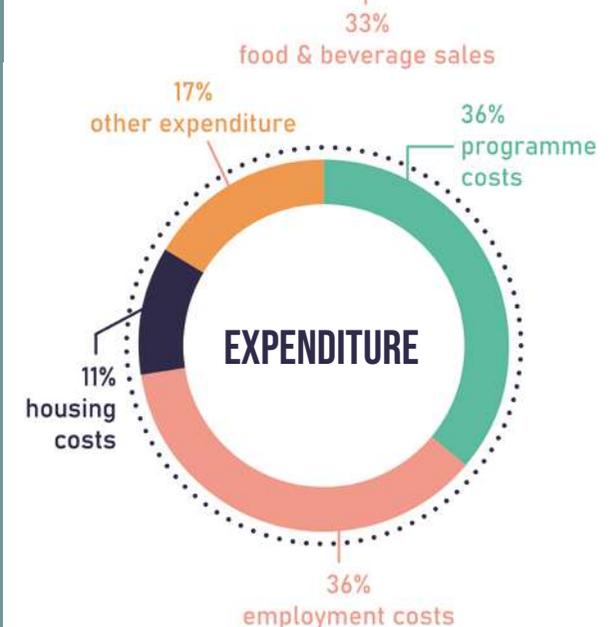
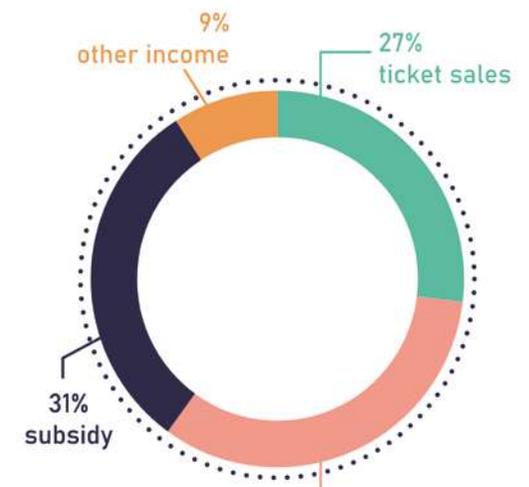
LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



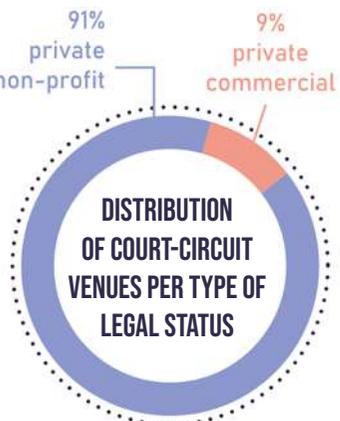
In 2019, Court-Circuit music venues had a **median audience capacity of 220**.

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.



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%)**.



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

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**.

DANSK
LIVE



Store Vega, Copenhagen (Denmark) - 2018 © Kim Matthai Leland

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

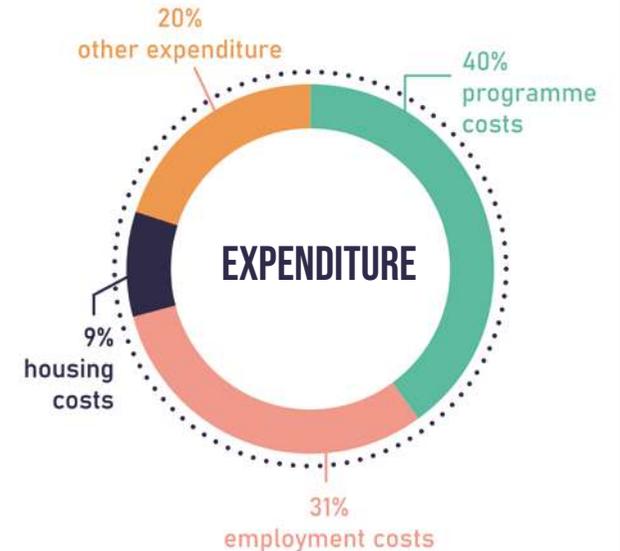
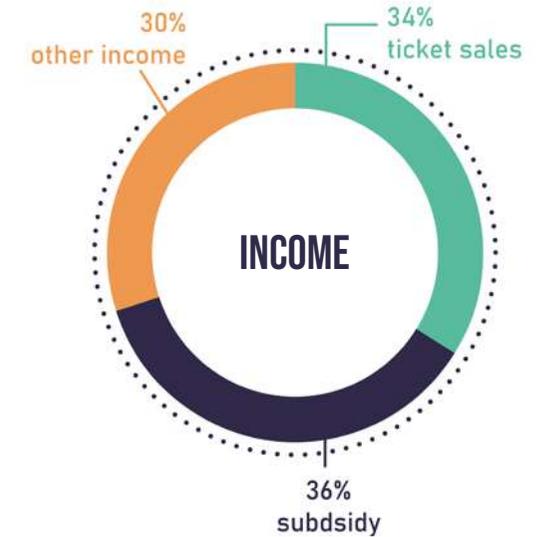
In 2019, the Dansk Live music venues presented an average of **134 music events per venue**.

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**.





La Vapeur, Dijon (FR) © Mathilde Leconte

IMPACT OF COVID RESTRICTIONS & INFLATION

Government-imposed pandemic restrictions significantly impacted the opportunities and income of performing artists, employed workers, and suppliers connected to FEDELIMA live music venues in France. During the pandemic, music events decreased by over 60%, with visits and ticket sales falling more than 70%, leading some venues into financial hardship.

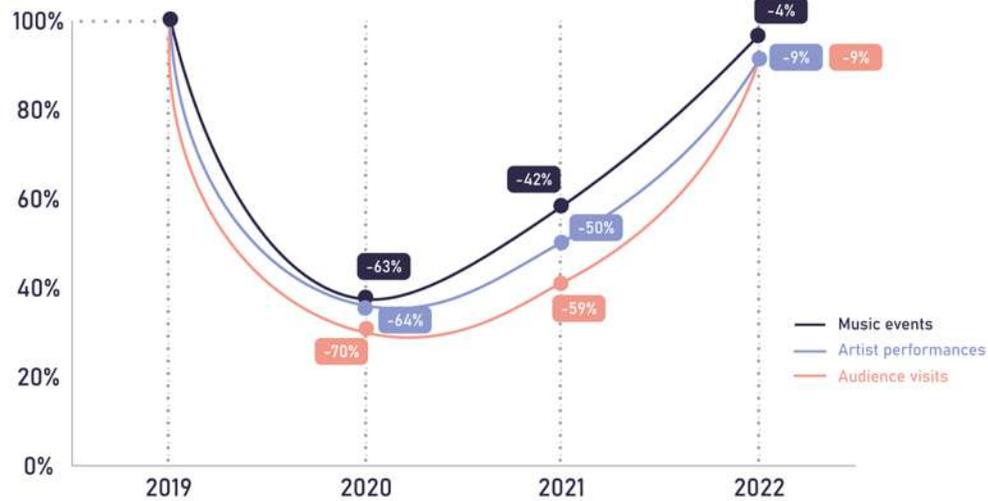
FEDELIMA's public and private non-profit venues managed to rely on regular subsidies to cover part of their fixed costs. Additionally, the government provided COVID support funds to FEDELIMA venues in 2020 and 2021, covering 15% of lost income in 2020 and 43% in 2021 compared to 2019. With these support measures, most jobs were retained, allowing venues to survive the crisis.

After pandemic restrictions lifted in 2022, there was a rebound in music events, attendance, ticket sales, and food and beverage sales. However, high inflation has driven up expenses for venues, including costs for staff, rent, energy, programming, and food and beverage supplies. Financial challenges, therefore, continue into 2023 and 2024.

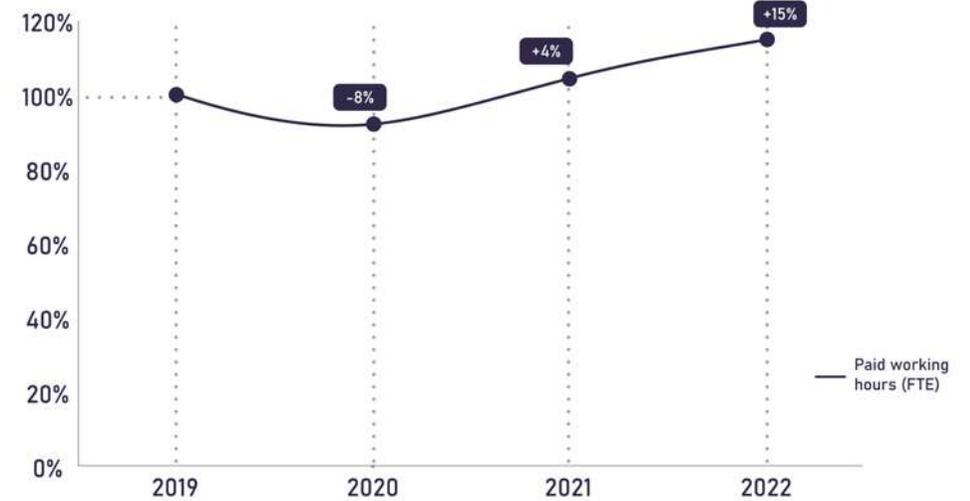
Based on comparison data 2019-2022 of 89 FEDELIMA music venues, collected during 2020-2024.

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

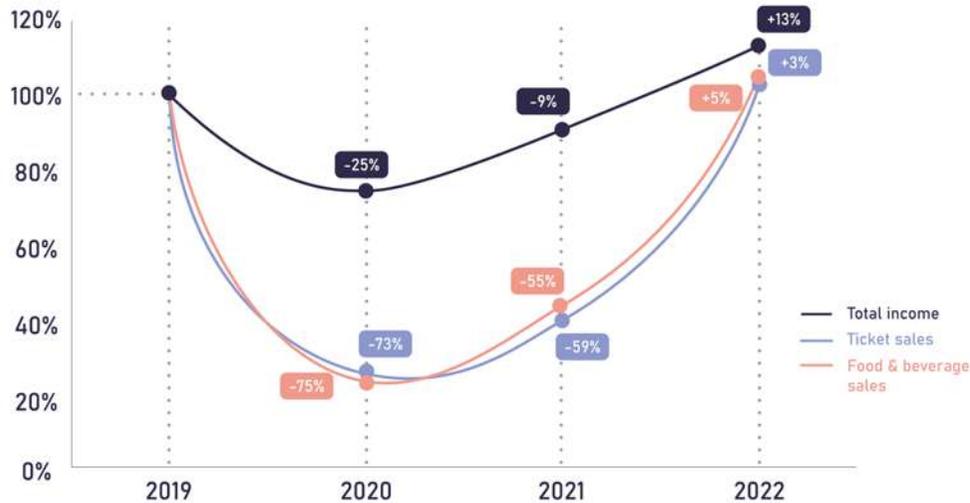
MUSIC EVENTS / ARTIST PERFORMANCES / AUDIENCE VISITS



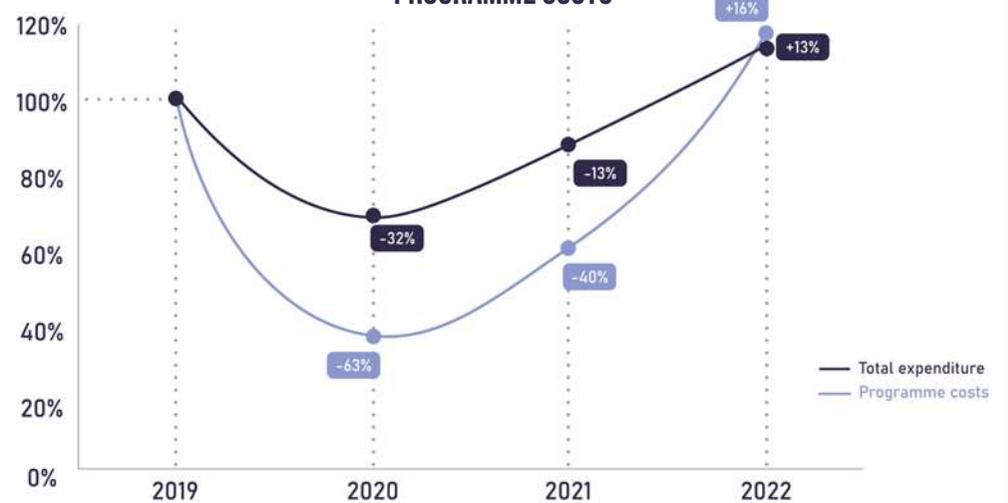
PAID WORKING HOURS (FTE)



TOTAL INCOME TICKET SALES / FOOD & BEVERAGE SALES



TOTAL EXPENDITURE PROGRAMME COSTS



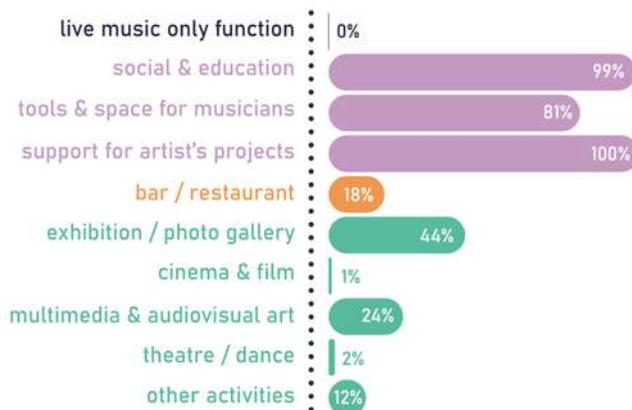


2020 OVERVIEW FEDELIMA VENUES & CLUBS (FRANCE)

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.

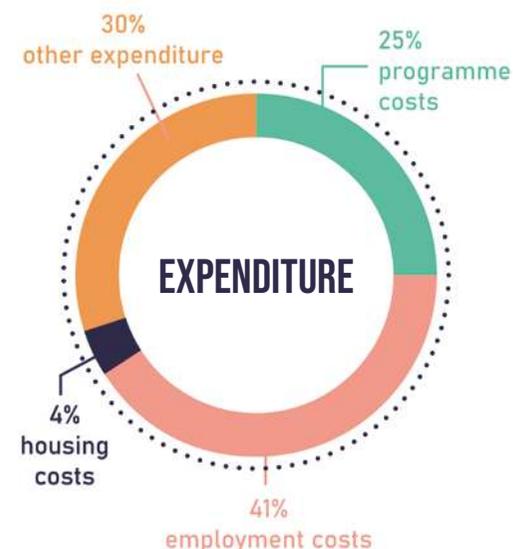
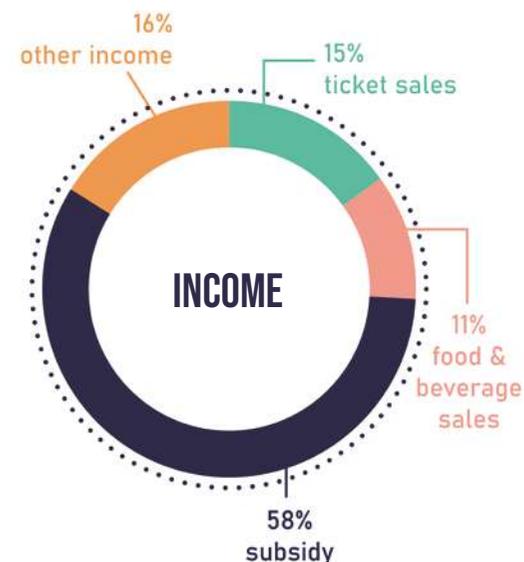
LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



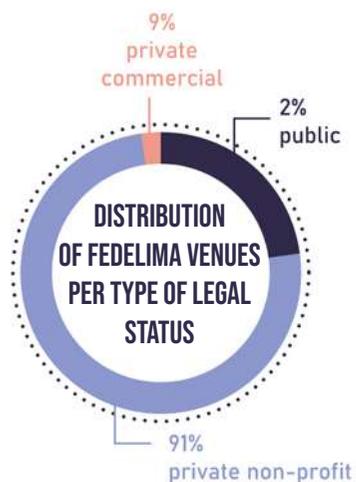
In 2019, FEDELIMA music venues had a **median audience capacity of 500**.

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.



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%)**.



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

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**.

2019-2020 OVERVIEW OF KEEPON LIVE VENUES AND CLUBS (ITALY)



ASSOCIAZIONE
DI CATEGORIA
LIVE CLUB E FESTIVAL
ITALIANI



**KEEPON
LIVE
FEST '24**





ASSOCIAZIONE
DI CATEGORIA
LIVE CLUB E FESTIVAL
ITALIANI

2020 OVERVIEW KEEPON LIVE VENUES & CLUBS (ITALY)

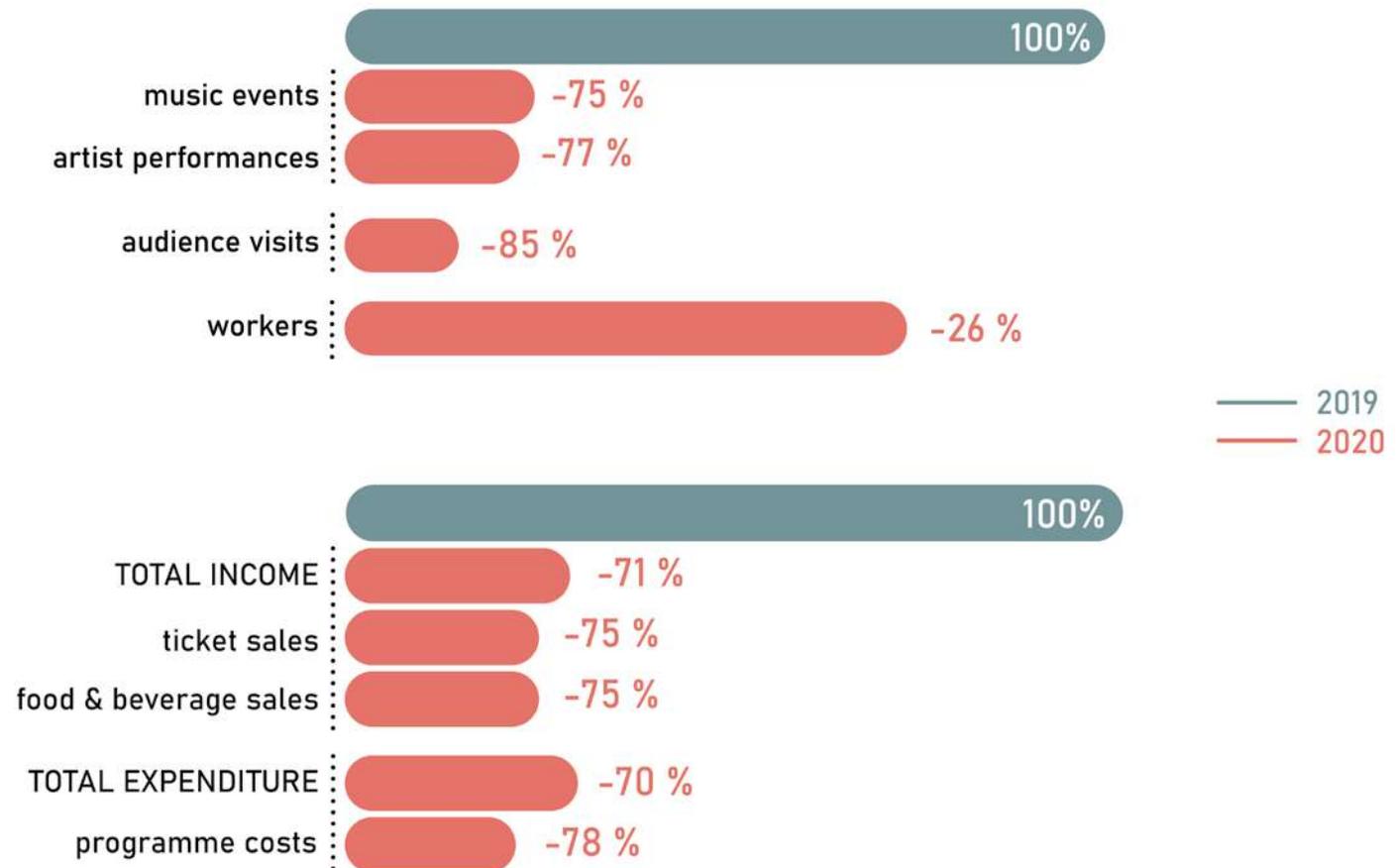
Based on compared data (year 2019+2020) of 10 KeepOn LIVE music venues, collected during 2020-2022.

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.



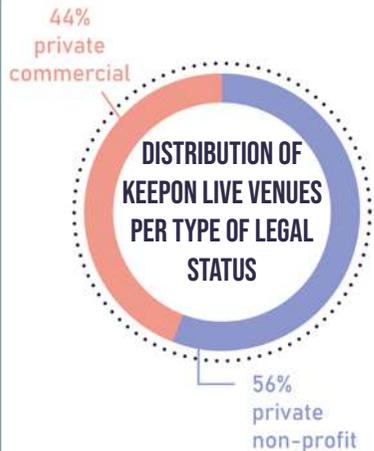


ASSOCIAZIONE
DI CATEGORIA
LIVE CLUB E FESTIVAL
ITALIANI

2019 OVERVIEW KEEPON LIVE VENUES & CLUBS (ITALY)

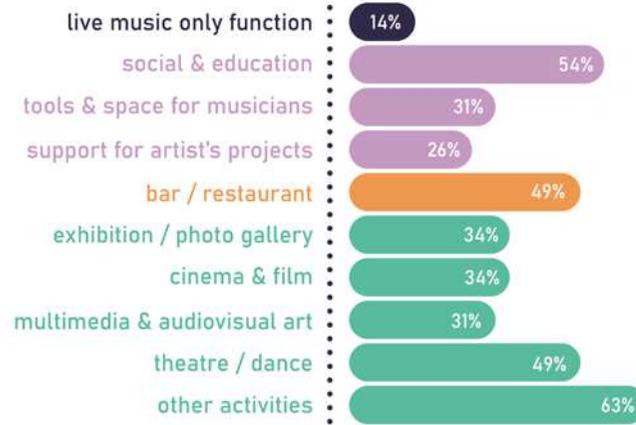
These figures represent 60 live music venues and clubs in Italy, which are part of the association Keep On LIVE.

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**.

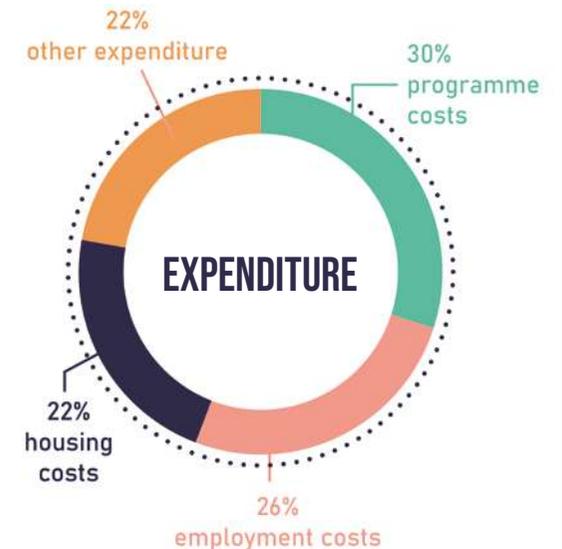
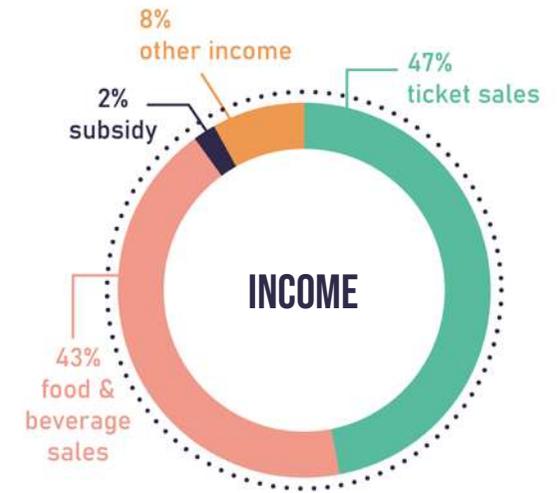
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities. **51%** of all KeepOn LIVE music venues also **organised festivals** in 2019.

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%)**.



IMPACT OF COVID RESTRICTIONS & INFLATION

The government-imposed pandemic restrictions had a significant impact on the opportunities and income of performing artists, (hired) workers and suppliers for LiveFIN music venues in Finland. Especially because most of the venues are private commercial structures, they are depending mainly on income generated by audiences, such as ticket sales and food and beverage sales. During the pandemic music events dropped over 60%, and visits and ticket sales went down over 70%, while many costs remained, putting most venues in financial difficulties.

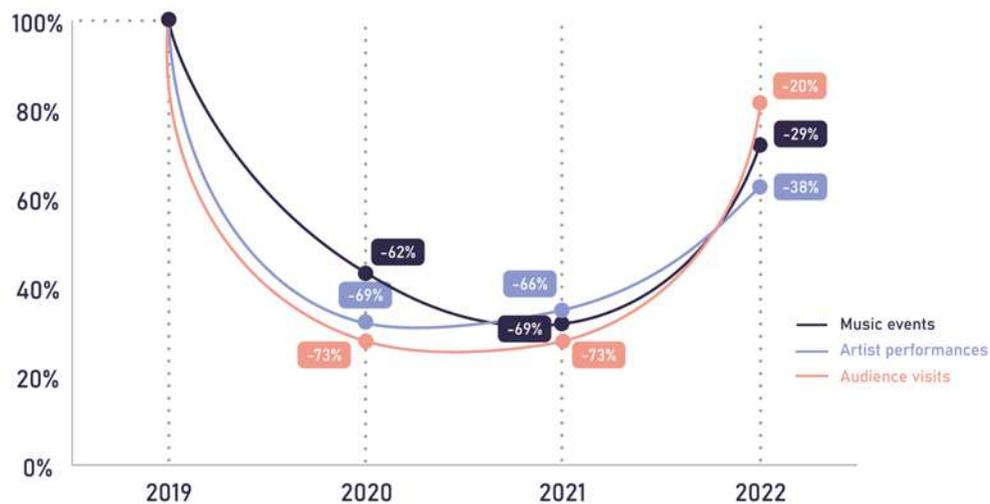
The government provided COVID support fund to LiveFIN venues in 2020 and 2021, but this covered only 12% of the lost income in 2020 and 28% in 2021 (compared to 2019). Thanks to these support schemes, most jobs were preserved, and venues were able to survive.

After the pandemic restrictions were lifted in 2022, the number of music events, visits, ticket sales and food and beverage sales began to recover. However, in the same period, high inflation led to sharply increasing expenditure for venues and clubs, such as costs for staff, housing, energy, programming and food and beverage purchases. As a result, financial challenges continue into 2023 and 2024.

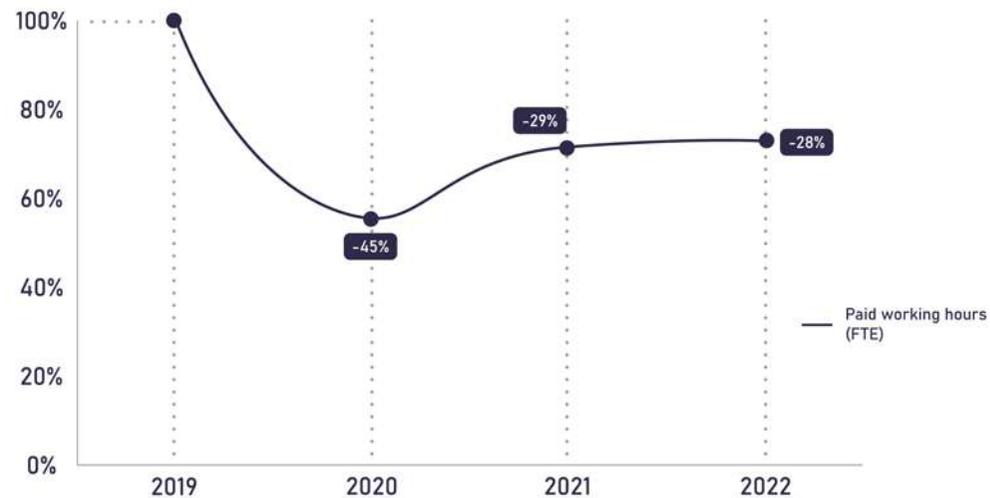
Based on comparison data 2019-2022 of 5 LiveFIN music venues, collected during 2020-2024.

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

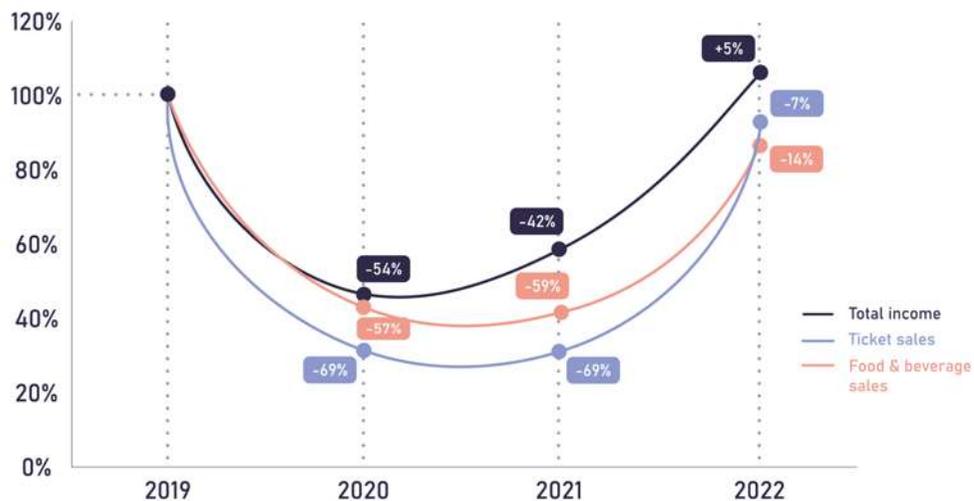
MUSIC EVENTS / ARTIST PERFORMANCES / AUDIENCE VISITS



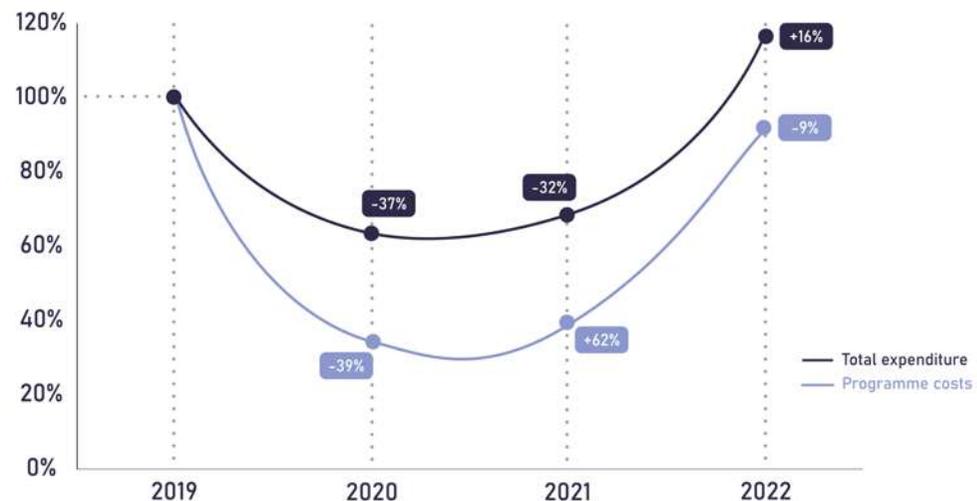
PAID WORKING HOURS (FTE)



TOTAL INCOME TICKET SALES / FOOD & BEVERAGE SALES



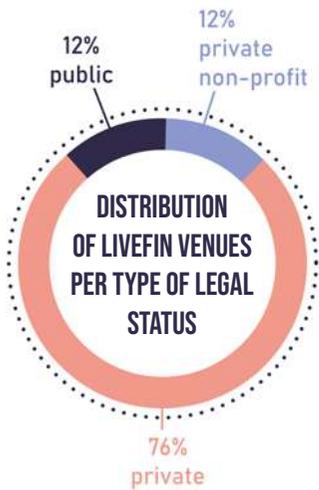
TOTAL EXPENDITURE PROGRAMME COSTS



2019 OVERVIEW LIVEFIN VENUES & CLUBS (FINLAND)

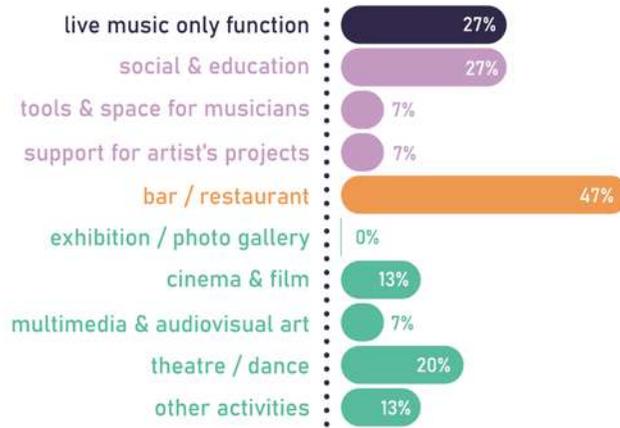
These figures represent 33 live music venues and clubs in Finland which are part of the association LiveFIN.

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**.

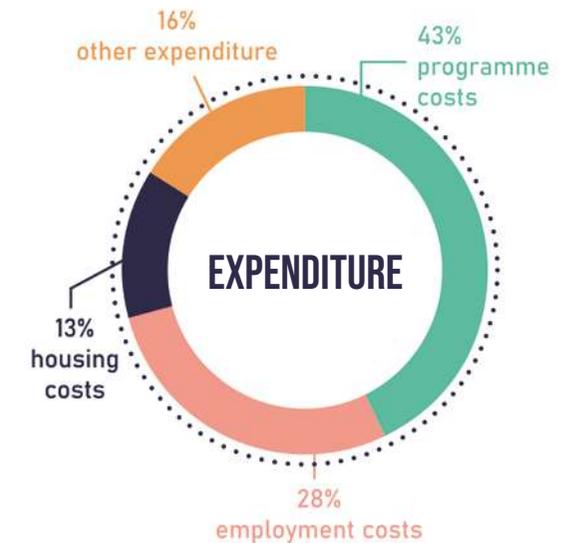
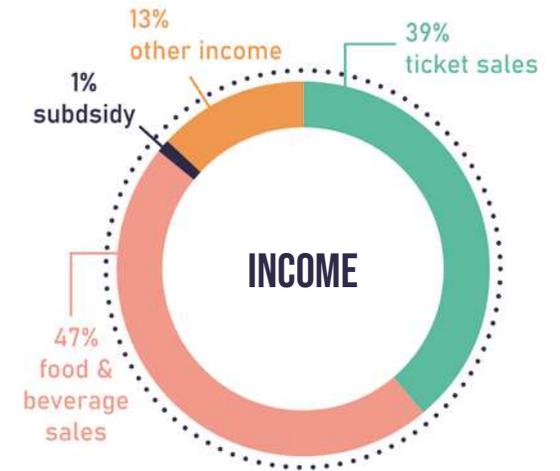
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities.

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%)**.

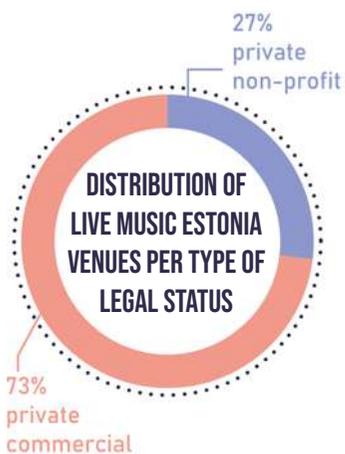


MUSIC
ESTONIA ^{EU}
LIVE

2019 OVERVIEW MUSIC ESTONIA LIVE VENUES & CLUBS (ESTONIA)

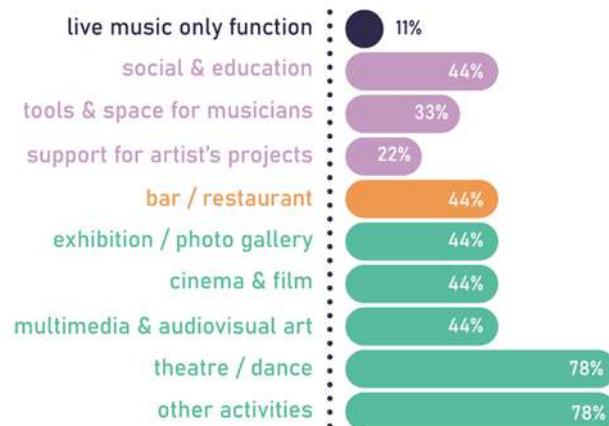
These figures represent 15 live music venues and clubs in Estonia which are part of the association [Music Estonia Live](#).

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



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

LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



In 2019, Music Estonia Live 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**.

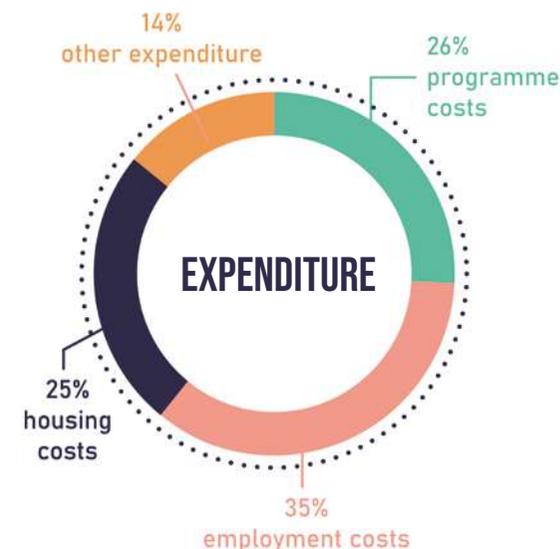
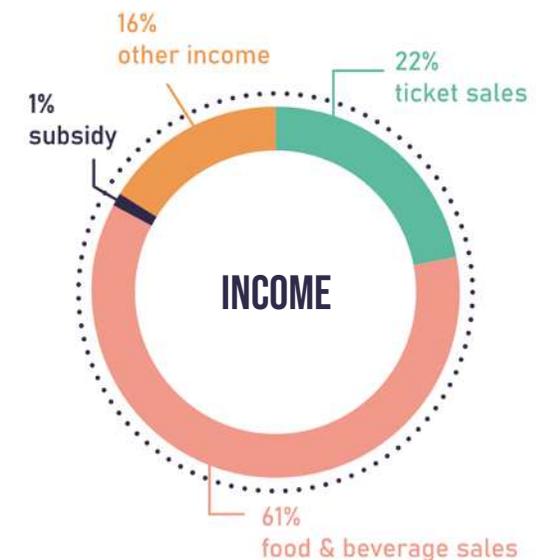
The venues were also involved in other functions than presenting live music, such as educational, social, artistic, culinary, and multi-disciplinary activities. **67%** of all Music Estonia Live music venues also **organised festivals** in 2019.

WORKFORCE IN LIVE MUSIC ESTONIA LIVE MUSIC VENUES AND CLUBS



Over **700 workers** were involved in the Music Estonia Live 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 Music Estonia Live 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%)**.



IMPACT OF COVID RESTRICTIONS & INFLATION

The government-imposed pandemic restrictions had a significant impact on the opportunities and income of performing artists, (hired) workers and suppliers for Norwegian Live music venues. During the pandemic music events dropped over 40% and the number of visits went down almost 70%, putting many venues in financial difficulties.

The public and private non-profit venues of Norwegian Live could still rely on regular subsidies to cover (some of) their fixed costs. Additionally, the government provided COVID support funds to most Norwegian Live venues in 2020 and 2021. Thanks to these support schemes, most jobs were preserved, and venues were able to survive.

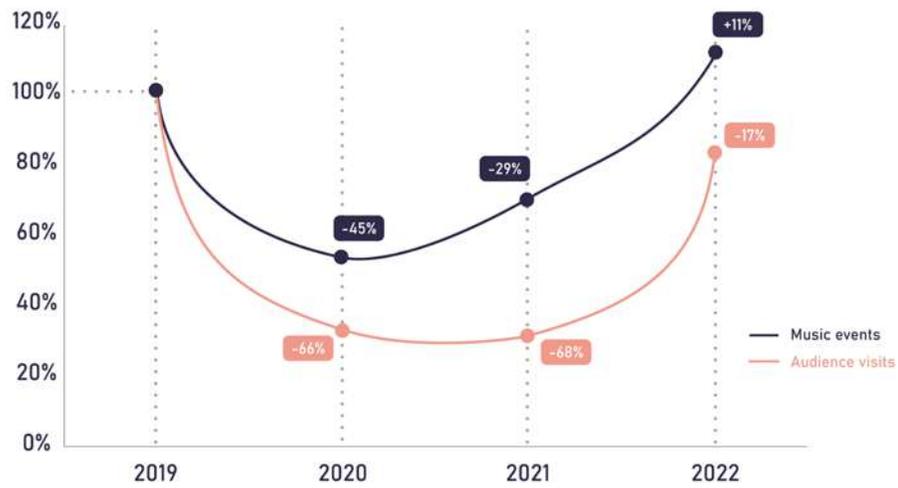
After the pandemic restrictions were lifted in 2022, the number of music events, visits, ticket sales and food and beverage sales began to recover. However, in the same period, high inflation led to sharply increasing expenditure for venues and clubs, such as costs for staff, housing, energy, programming and food and beverage purchases. As a result, financial challenges continue into 2023 and 2024.

Based on comparison data 2019-2022 of 27 Norwegian Live music venues, collected during 2020-2024.

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

2019-2022 NORWEGIAN LIVE

MUSIC EVENTS / AUDIENCE VISITS



Sami Easter Festival (NO) © Mads Suhr Pettersen



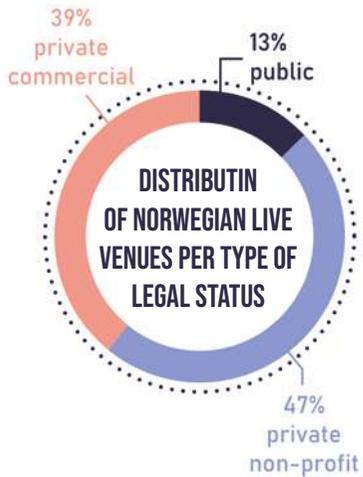
© Norwegian Live



2019 OVERVIEW NORWEGIAN LIVE VENUES & CLUBS (NORWAY)

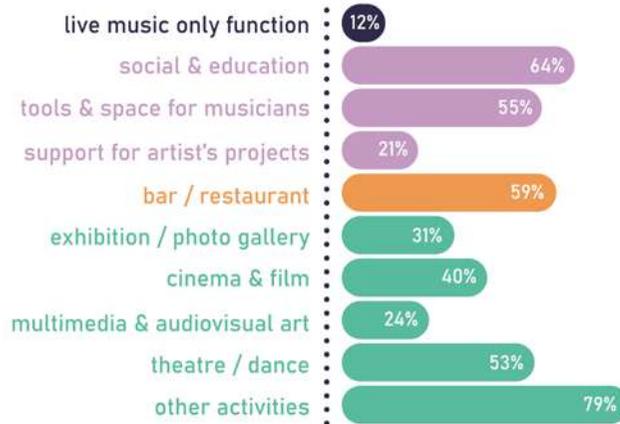
The association Norwegian Live represents 165 live music venues and clubs in Norway.

Based on data (year 2019) of 58 Norwegian Live music venues, collected during 2020-2021. Because of limited response and the high diversity of Norwegian Live venues the median numbers on this page are not a representation of all Norwegian Live venue members.



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



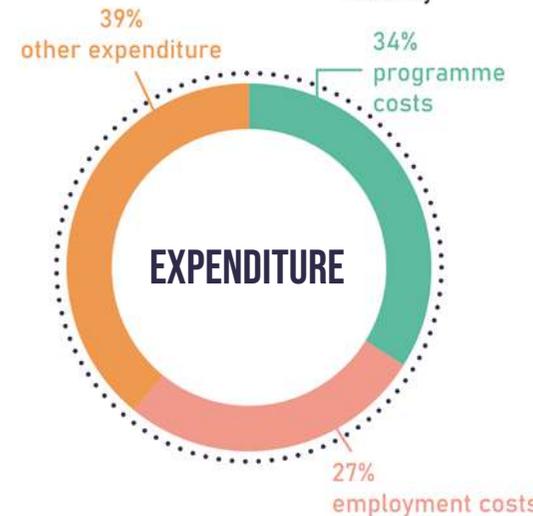
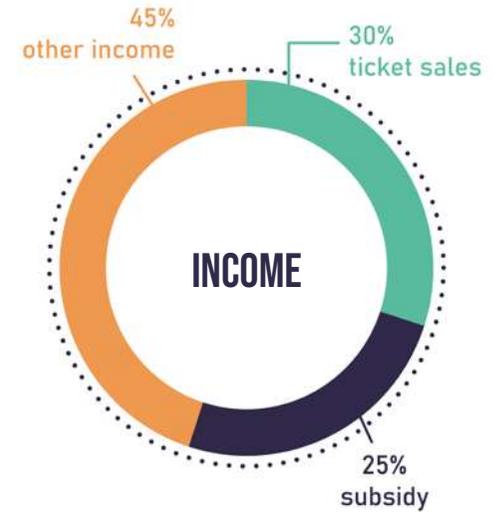
In 2019, Norwegian Live music venues had a **median audience capacity of 385**. The music venues presented a **median of 64 artist performances per venue**, which attracted almost **5000 visits median per venue**.

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.



IMPACT OF COVID RESTRICTIONS & INFLATION

The government-imposed pandemic restrictions had a significant impact on the opportunities and income of performing artists, (hired) workers and suppliers for PETZI live music venues in Switzerland. During the pandemic music events dropped almost 50%, visits almost 70%, and ticket sales went down with 55%, putting many venues in financial difficulties.

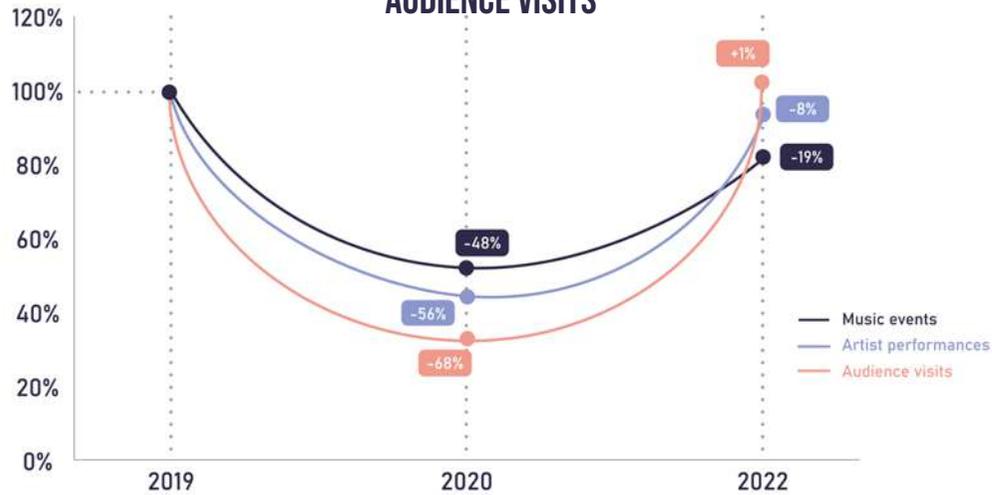
As all PETZI venues are private non-profit structures, they were still able to rely on regular subsidies to cover (some of) their fixed costs. Additionally, the government provided COVID support funds to PETZI venues in 2020 and 2021, and this covered 54% of the lost income in 2020 (compared to 2019). Thanks to these support schemes, most jobs were preserved, and venues were able to survive.

After the pandemic restrictions were lifted in 2022, the number of music events, visits, ticket sales and food and beverage sales began to recover. However, in the same period, high inflation led to sharply increasing expenditure for venues and clubs, such as costs for staff, housing, energy, programming and food and beverage purchases. As a result, financial challenges continue into 2023 and 2024.

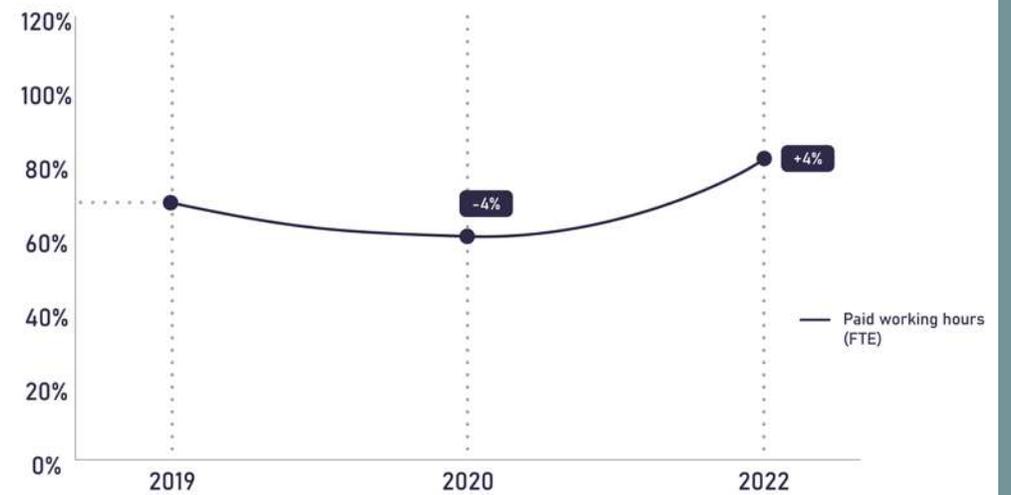
Based on comparison data 2019-2022 of 40 PETZI music venues, collected during 2020-2024.

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

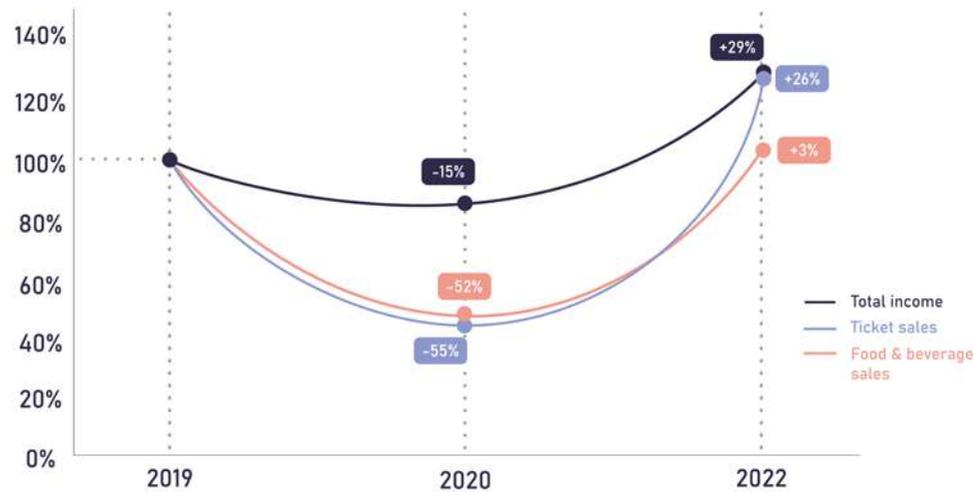
MUSIC EVENTS / ARTIST PERFORMANCES / AUDIENCE VISITS



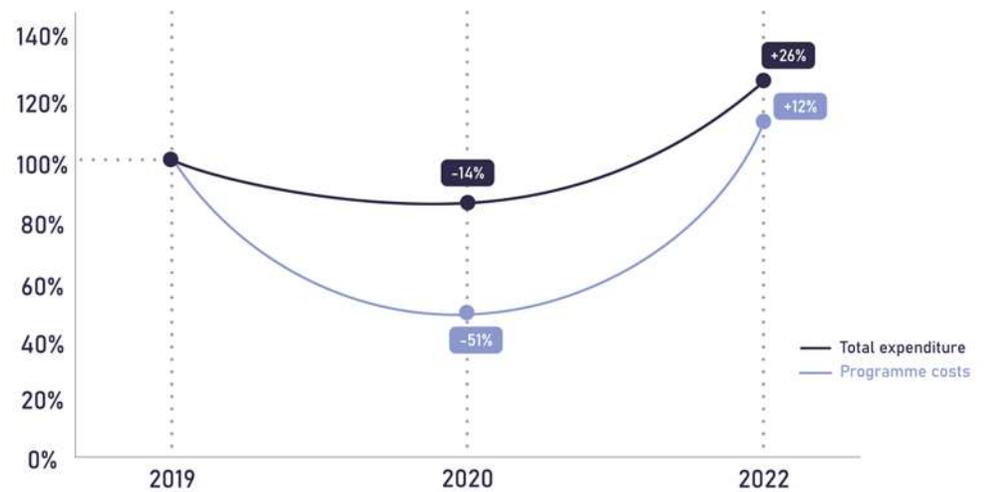
PAID WORKING HOURS (FTE)



TOTAL INCOME TICKET SALES / FOOD & BEVERAGE SALES



TOTAL EXPENDITURE PROGRAMME COSTS

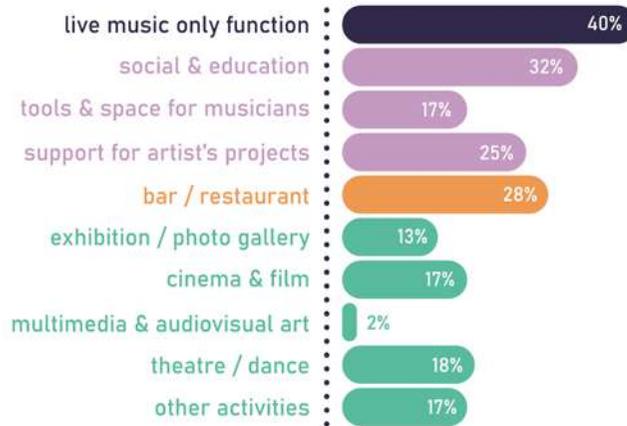


2019 OVERVIEW PETZI VENUES & CLUBS (SWITZERLAND)

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.

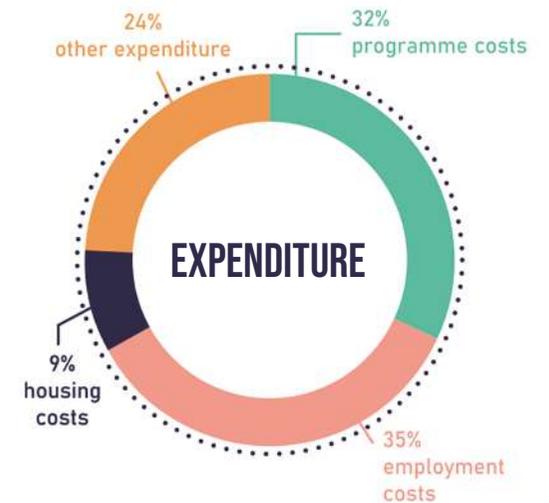
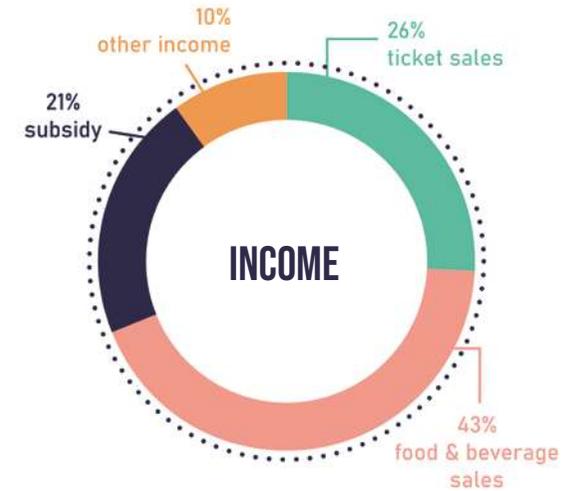
LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



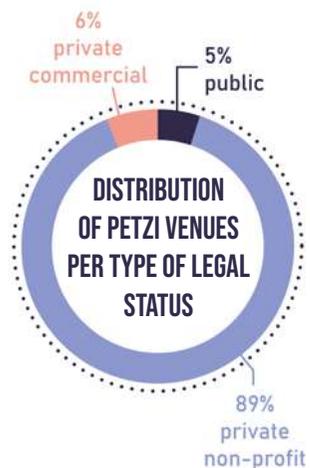
In 2019, PETZI music venues had a **median audience capacity of 300**. Music venues presented almost **19,000 artist performances**, which attracted almost **1.9 million visits**.

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.



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%)**.



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

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**.



**VN
PF**

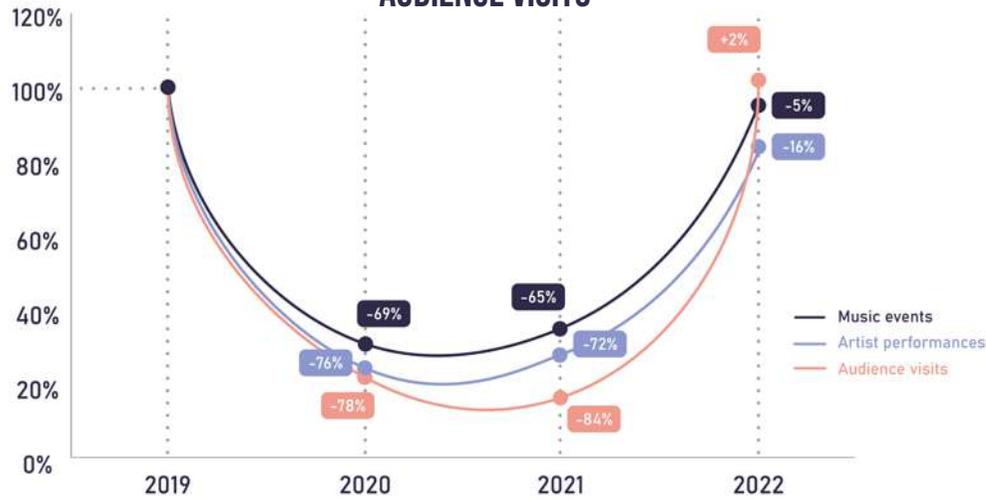
IMPACT OF COVID RESTRICTIONS & INFLATION

The government-imposed pandemic restrictions had a significant impact on the opportunities and income of performing artists, (hired) workers and suppliers for VNPF live music venues in The Netherlands. During the pandemic music events dropped almost 70%, visits and ticket sales went down over 80%, putting many venues in financial difficulties.

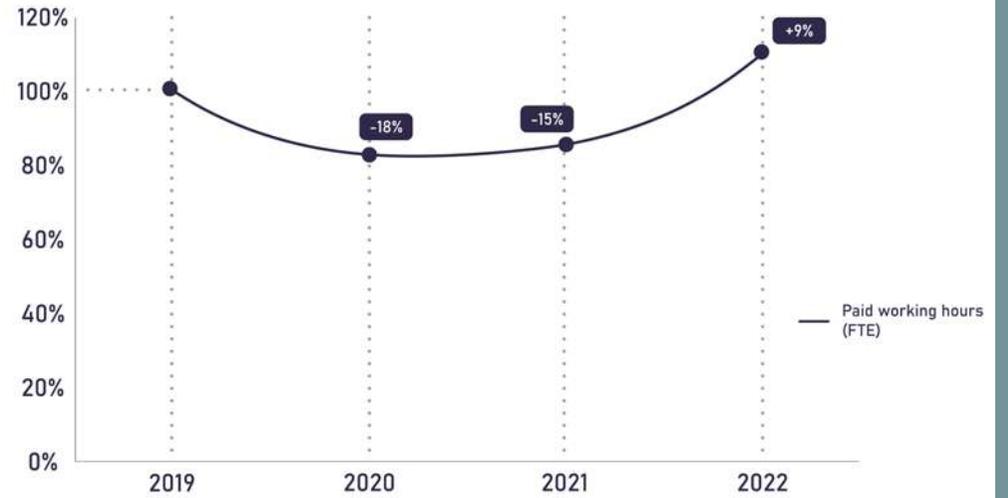
As almost all VNPF venues are private non-profit structures, they were still able to rely on regular subsidies to cover (some of) their fixed costs. Additionally, the government provided COVID support funds to VNPF venues in 2020 and 2021, but this covered only 12% of the lost income in 2020 and 28% in 2021 (compared to 2019). Thanks to these support schemes, most jobs were preserved, and venues were able to survive.

After the pandemic restrictions were lifted in 2022, the number of music events, visits, ticket sales and food and beverage sales began to recover. However, in the same period, high inflation led to sharply increasing expenditure for venues and clubs, such as costs for staff, housing, energy, programming and food and beverage purchases. As a result, financial challenges continue into 2023 and 2024.

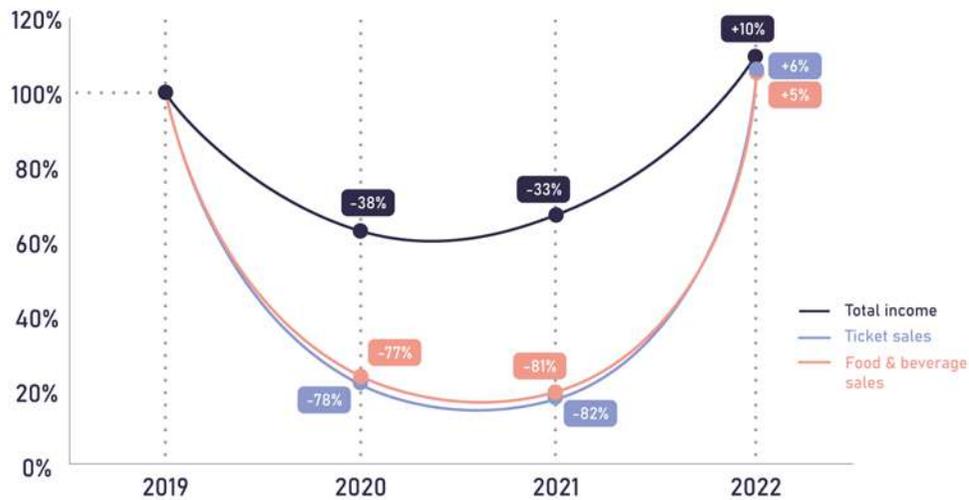
MUSIC EVENTS / ARTIST PERFORMANCES / AUDIENCE VISITS



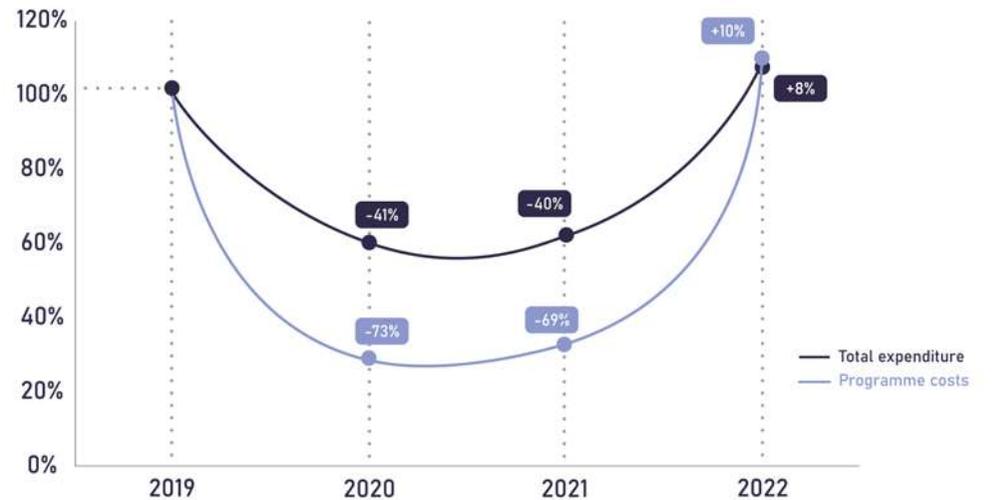
PAID WORKING HOURS (FTE)



**TOTAL INCOME
TICKET SALES / FOOD & BEVERAGE SALES**



**TOTAL EXPENDITURE
PROGRAMME COSTS**

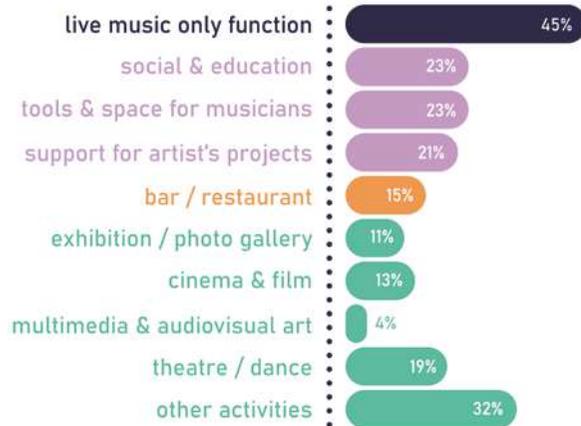


2019 OVERVIEW VNPF VENUES & CLUBS (THE NETHERLANDS)

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.

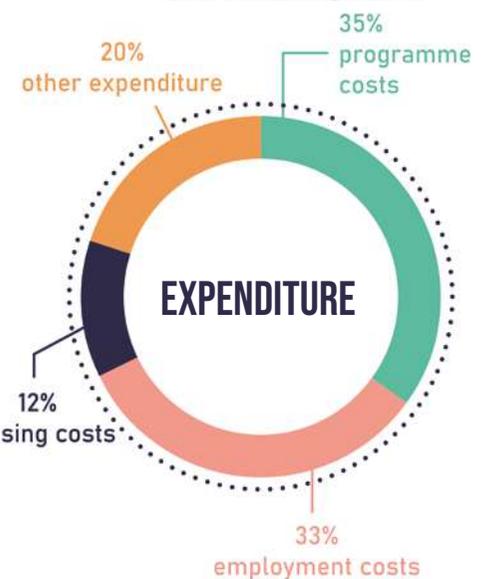
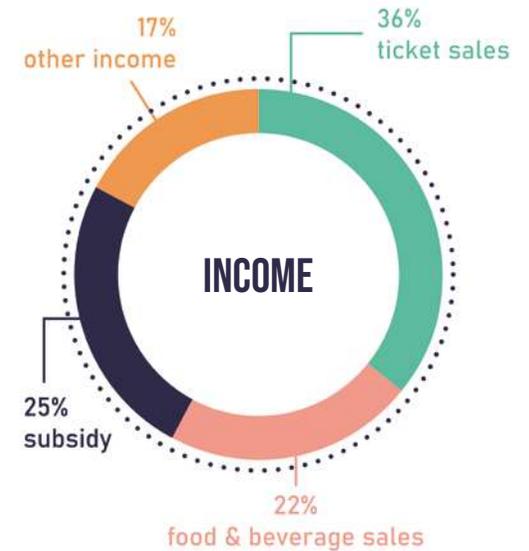
LIVE MUSIC PERFORMANCES, VISITS AND OTHER FUNCTIONS



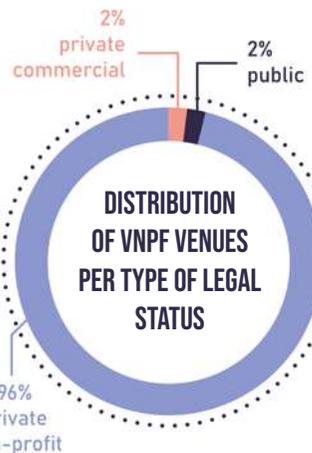
In 2019, VNPF music venues had a **median audience capacity of 590**. The music venues presented well over **27,000 artist performances**, which attracted almost **4.2 million visits**.

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.



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%)**.



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**.

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 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.

In 2024, the network is composed of 20 members situated in 16 countries. The members are regional and national live music associations that represent over 3200 music venues, clubs, festivals and other live music related organisations located all over Europe. For more detailed information, [see here the most recent Live DMA members inventory](#) (October 2024).

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, and 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, 2020, 2021 and 2022 of a panel of 224 music venues and clubs part of 8 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. For a list of definitions [see page 68](#). 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 provides 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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Despite of all the care devoted to the editing of this publication, the publisher cannot accept liability for any damage that is the result of any error in this publication. Live DMA would also like to emphasize that this data presentation consists of totals and averages of the music venues and therefore no comments can be made about individual music venues based on the data provided in this report.