LIVE DMA

LINKING INITIATIVES AND VENUES IN EUROPE DEVELOPING MUSICAL ACTIONS

THE SURVEY

LIVE MUSIC VENUES & CLUBS IN EUROPE - FACTS & FIGURES

Publication January 2020, based on data 2017

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INTRODUCTION

Live DMA is a strong network of music venues associations across Europe and represents 2597 live music venues and clubs as part of 19 members in 15 countries.

Since 2012, Live DMA collects data to highlight the huge artistic, social and economic impact of live music venues and clubs in Europe. The data results are used for representation on a local, national and European level, as it can help individual music venues or representative associations to increase awareness, recognition and adapted support for live music.

From 2017 to 2021, Live DMA receives funding from the Creative Europe programme of the European Commission for the Live Style Europe project. One of the key actions of Live Style Europe is to develop The Survey, to increase the representativity of the music venues and promote the exchange of knowledge between music venues and their networks. Live DMA is recognised as a relevant interlocutor by European institutions. We advocate towards European policy makers to improve the live music conditions in Europe and the sustainability of the local music scenes. Live DMA strongly supports and actively contributes to the emergence of a future European programme dedicated to the music sector, 'Music Moves Europe', and the development of a European Music Observatory.

In this perspective, we hope this new report can help policy makers to better understand the reality of live music venues and clubs in Europe, convince them about the importance of public support, and include our recommendations in their future music policies.

The Survey report presents key numbers of music venues and clubs across Europe to better comprehend the role, capacities and values live music venues and clubs have, by looking at their main characteristics, functions, activities, audiences, human resources and financial numbers. Here we also provide a more accurate reading of different types of music venues, based on their legal status and audience capacity. In this new publication, we look deeper into the differences between types of venues and clubs with a public, private non-profit or private commercial legal status. We also give an overview of the main characteristics of the venues and clubs per geographical region and per Live DMA member. In this way, we get better insights in the large diversity and different business models of music venues, and we are able to compare the same types of venues across Europe with eachother. This is followed by recommendations on the use of the data results in the last part of this report.

ROSALÍA
Spain

« If it were not for all these spaces, I would not have been able to find myself as a musician, as a performer, as an artist. Long live these little temples of live music, we must protect them because, without them, music lovers are lost. » **Rosalia**

Selah Sue
Belgium

« I've had the luck to be invited to play in different venues, big and small throughout my career. I would never have been the artist that I'm now without the support of the grassroots venues. Smaller clubs were the perfect preparation for the bigger festivals. Both the intimacy between public and artist and the creative process on stage only reach their full potential in grassroots venues. That's why they're still my favourite place to perform. »
Selah Sue

Extracts from "What Artists Say" campaign, June 2019.

Want to discover more?
Check **http://www.live-dma.eu/what-artists-say**
#SupportYourLocalMusicScene

KEY NUMBERS

Based on the data (2016 and 2017) of 604 music venues part of Live DMA, collected during 2018 and 2019, and extrapolated to data of 2597 music venues part of Live DMA in 2017.

VENUES AND CLUBS: THE DRIVING FORCE OF THE LIVE MUSIC SECTOR

Live DMA's music venues and clubs present nearly a million artist performances per year. Live music venues and clubs are precious platforms for artists to be discovered and build their fanbase, especially for emerging talents. In the last decades, performing live has also become more important to most musicians, comparing to the income they generate from recorded music or the visibility they gain from the streaming platforms.

Live music venues and clubs create a large scale of jobs and skills, such as management, administration, production, communication, programming, education, technics, public relations, mediation, and other kinds of services. 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 be highlighted in their professional career.

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. The income models are much more different, related to the type of venue (audience capacity, legal status), which is explained in more details in the next chapters.

Music venues and clubs not only provide over one billion euro income which creates a high employment rate for the workers and performing artists, but they also participate to the vibrancy of cities and rural areas. *The Music Cities Manual*, published by Sound Diplomacy[1] explains how ***"music creates jobs, is a regeneration tool, increases economic output, is a tourism driver, improves wellness, enhances social inclusion, supports global Sustainable Development Goals, supports thriving nightime economy"***. Live music venues and clubs also create many economical spillover effects, which are not detailed in this report, but that you can find in other studies published by our members, such as the *UK Live Music Census*[2] and the *Berlin Club Study*[3], which states: ***"The turnover-related overall effect is around 1.3 times the direct turnover of the Berlin club scene. Between 20 and 25% of the overall economic output goes back to the local or national governments through taxes."***

The 2597 live music venues and clubs part of Live DMA annually

ORGANISE	PRESENT	ATTRACT
400,000 music events	**950,000** artist performances	**70 MILLION** audience visits

87,000 workers are involved in the venues and clubs

including **28,000** employees including **56,000** volunteers

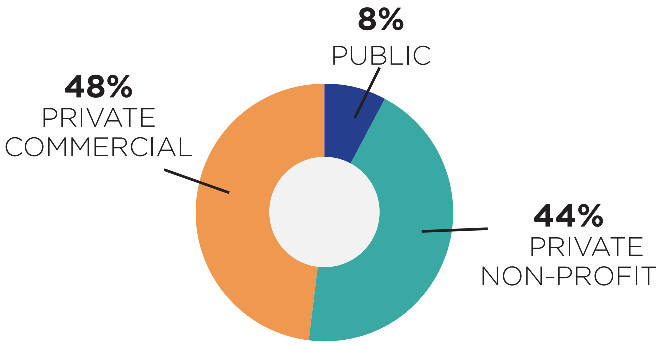
The venues and clubs generate **€ 1.8 billion** turnover, of which **€ 620 million** from ticket sales. The venues spend **€ 530 million** on direct programme costs, and **€ 560 million** on personnel costs.

1 http://www.live-dma.eu/the-music-cities-manual/
2 http://www.live-dma.eu/uk-live-music-census/
3 http://www.live-dma.eu/club-culture-berlin-facts-figures/

LEGAL STATUS: A DIVERSITY OF BUSINESS MODELS

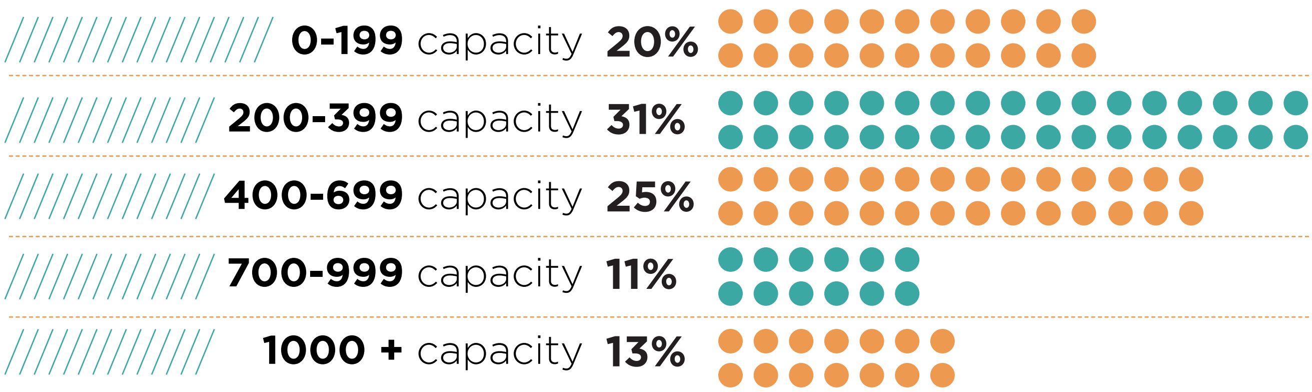
8% of Live DMA venues are public organisations, **44%** are private non-profit, and **48%** are private commercial. The live music sector relies on a complex ecosystem and this diversity translates into different business models, and different types of regulations the venues need to comply with. This leads music venues and clubs to different needs and priorities, and it might be challenging to create music policies that answer them all. This Survey provides a better understanding of the European live music landscape. Still, the different types of venues have so many practices in common that many political actions can be implemented to benefit all of them. The Survey aims to be a first step in identifying different levels of well-adapted actions for policy-makers to embrace and support the rich diversity of the European live music sector. Despite their different legal status, the music venues and clubs all work with the same objectives: programming a diversity of artists, welcoming diverse audiences, developing a project linked to their territory and being recognised as cultural actors.

Type of Legal Status - All Venues



The live music associations part of Live DMA are federated around the value of general interest; all need to read, sign, agree and comply with an ethic charter clarifying these values.
You can access this ethics charter on the dedicated webpage : **http://www.live-dma.eu/wp-content/uploads/2019/06/LiveDMA_Ethical_Charter_2019.pdf**

AUDIENCE CAPACITY : A SPACE FOR EVERYONE



The Survey results show that **51%** are small venues (<400-audience capacity), **36%** are medium-sized venues (400 to 999 capacity) and only **13%** are large venues (1000+ audience capacity). The larger venues often consist of multiple smaller concert halls. The median capacity of all live music venues is 375 audience capacity. In that sense, Live DMA's live music venues and clubs are mainly but also generally small music venues, especially when compared to arenas composed of one main hall.

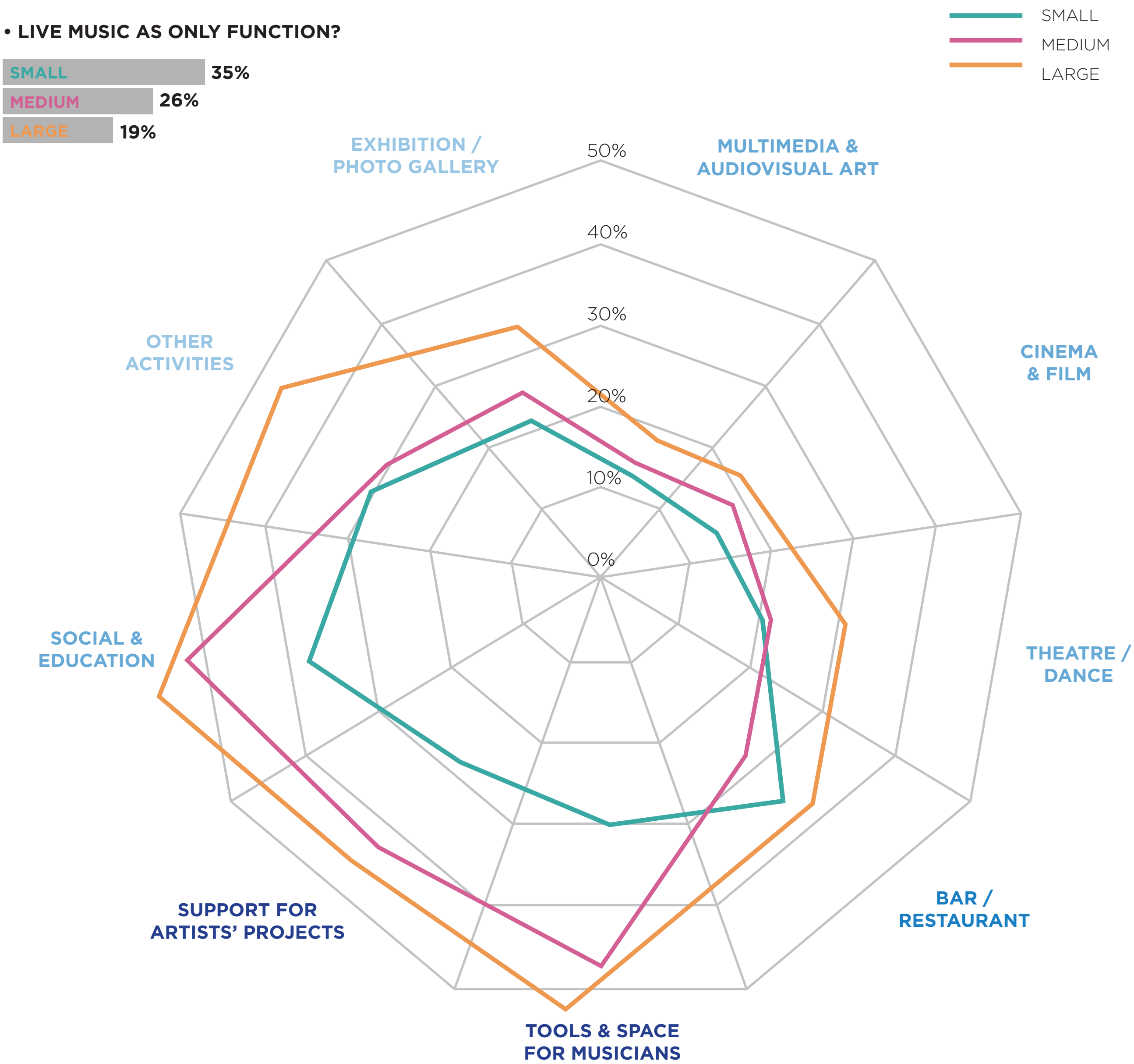
Public venues in average have larger concert halls for live music **(600 median)**, compared to private non-profit venues **(399 median)** and private commercial venues **(300 median)**. The latter is mainly caused by the relatively small audience capacity of venues in Germany, Spain, Sweden and the UK.

FUNCTIONS: MORE THAN LIVE MUSIC

The music venues and clubs all share their core activities of organising live concerts and programming music, but only **37%** of them present live music as their only function. One third of all venues manage social and educational activities, rehearsal spaces, support and projects for artists. One third of all venues combine live music with running a bar or restaurant outside concert hours. In addition, almost half of all respondents have multidisciplinary functions such as hosting a cinema, theatre, photo gallery or organising other non-musical activities.

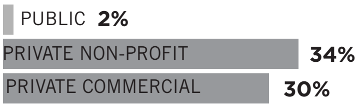
The Survey results show us that the smaller the venue, the more chances the venue has live music as its only function, while larger venues have a higher share of social, educational and artists' support projects.

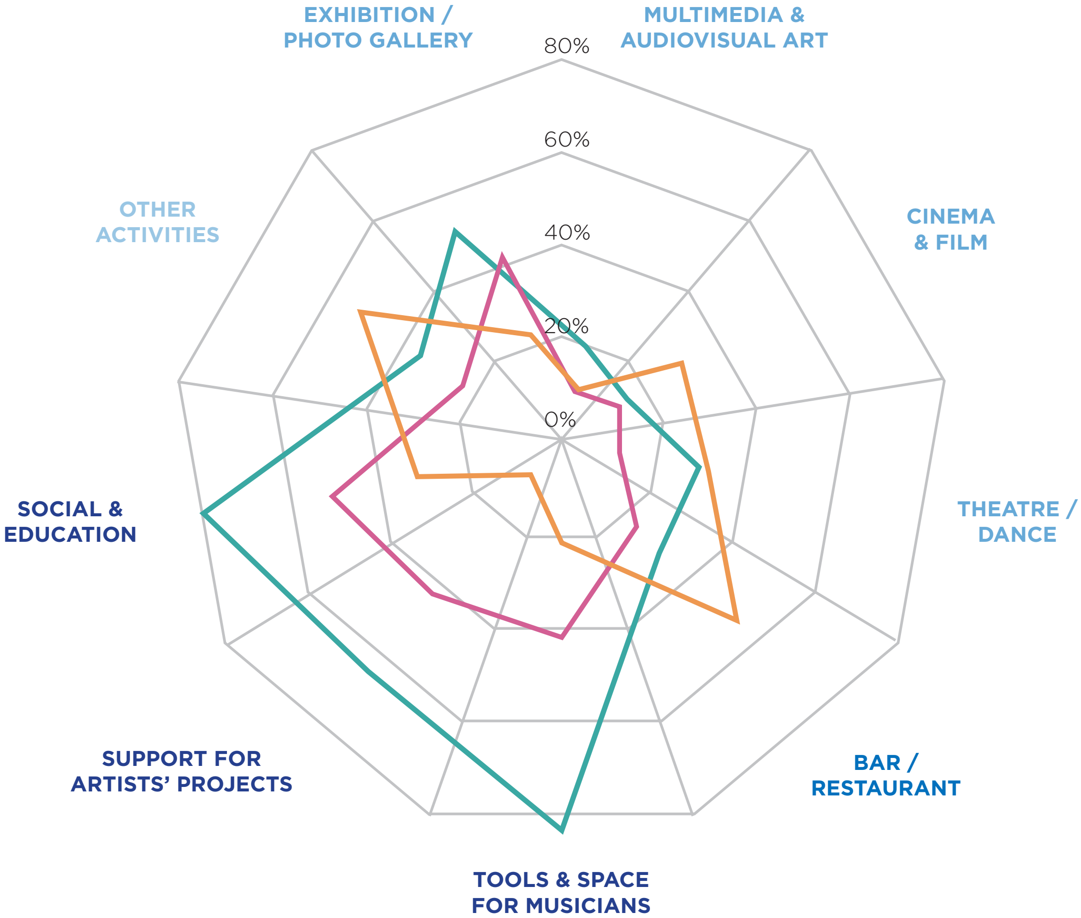
Venues' Functions Per Audience Capacity



Venues' Functions Per Legal Status

• LIVE MUSIC AS ONLY FUNCTION?





Public venues, especially, have almost never (**2%**) solely a live music function. Public venues more often have social & educational functions, next to presenting live music: **80%** of public venues have a social/educational function compared to **45%** of private non-profit venues and **31%** of private commercial venues.

Public and private non-profit venues more often have tools, spaces and/or support for artists' (projects): **82%/63%** of public venues, **42%** of private non-profit venues and **21%/13%** of private commercial venues

Regarding the bar-restaurant function of the music venues outside concert and clubhours, this is often part of their business model to cover the costs of the music programming. Many of the music venues within the Live DMA network are also multidisciplinary centres where artists and audiences from different art forms and subcultures are connected.

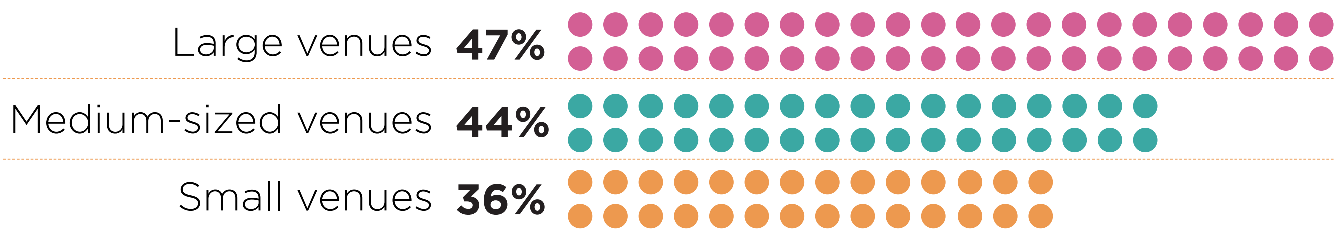
MUSIC EVENTS, PERFORMANCES AND VISITS: WHERE ARTISTS MEET AUDIENCES

In average, a music venue or a club organises **157** music events per year and programmes **367** artist performances during these events. This means the venues and clubs present an average of **2.3** artist performances per music event. These additional live performances are mostly support acts of the headliner artists and/or a line-up of multiple artists.

The programming of support acts and multiacts are an important way for venues to present more new upcoming talents. It is often the first stage experience for local artists, and crucial for the talent development of emerging artists.

38% of all music venues also organise festivals, especially larger venues.

Share of Venues that Organise Festivals per Audience Capacity



It is a common assumption to think that the online streaming format impacts live music practices in the way that people do not want to spend 60-90 minutes to listen to one single artist's show. However, the Survey results show that the audience is not turning away from these traditional formats as the number of regular concerts and visits in the music venues and clubs is still very high. Moreover, music venues also adapt to new trends and audiences behaviour by organising more multiacts and conceptual events and club nights. New formats attached to live music create other complementary experiences but do not seem to replace the concerts experiences in the live music venues and clubs.

Paid and Free Admission Visits - All venues

83% PAID ADMISSION FEE

17% FREE ENTRANCE

83% of all visits were with an admission fee, and 17% of all visits were free entrances.

When looking at different types of venues here we notice that **smaller venues** more often programme free concerts. These are mostly venues that combine the function of live music with a bar/restaurant.

Public venues have in average more free visits to music events (23% free visits), compared to private non-profit venues (20% free visits) and private commercial venues (16% free visits).

PUBLIC VENUES

23% free visits

PRIVATE NON-PROFIT VENUES

20% free visits

PRIVATE COMMERCIAL VENUES

16% free visits

Access to free events creates positive cultural habits, especially for young audiences. It is also a way to open venues to a broader audience, who will take less 'financial risks' to attend a concert different from their usual music tastes. Therefore, subsidies can help to organise free events and bring opportunities to present more emerging talents to new audiences.

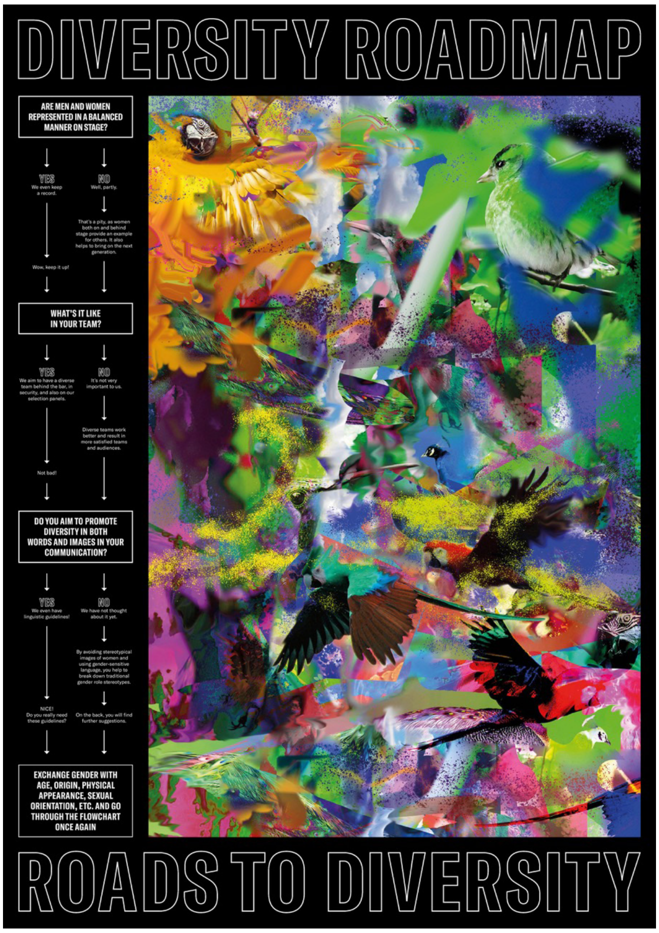
Unfortunately, Live DMA also observed flipside effects to this phenomenon. For instance, private commercial venues sometimes experience free events organised by public organisations as an unfair competition to their own music events, especially when not combined with adapted music policies. These free music events, often organised by municipalities, programme big acts for free mostly during summer. This may be a direct consequence of the growing competition between cities at national or European level to become more and more attractive. It can create audiences that are less willing or used to pay for concerts and for live music in general. The only solution for this is a better dialogue and cooperation between public and private actors to implement music policies at local level, such as subsidies for programming emerging artists, legalisation of access to music venues for people under 18, co-organisation of major events with the existing music venues and implementation of long-term policies to protect venues and music areas.

Music venues and clubs play an important role in the cultural life of rural areas and of cities. They constitute spaces to develop a sense of citizenship, as well as meeting places for artistic expressions and cultural diversity. With their large spectrum of activities, we understand that the users of the music venues cannot be defined in two separate groups: the creators on one side, and the consumers on the other side. They can be active participants in social or educational activities (ex: youth concerts or choirs). They can rehearse with their own band in the venues' studios. Artists might also participate and benefit from activities coordinated by the music venues such as residencies and other ways of artistic support. Moreover, the format of concerts and the listening practices are evolving (location, scenary, interactions...) and these frontiers around the stage tend to be more permeable.

"Erika Fischer-Lichte describes theater as a performance that everybody present in the room participates in. Without the audience, the experience cannot take place. The audience thus becomes a creator in the art of theater. The same thing can be said of the club experience: it cannot be created without the club-goers themselves" [3]

Moreover, the role of live music venues and clubs for individual and collective emancipation must not be underestimated. For the 70 million visitors per year, 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 for a period of time. Venues and clubs put efforts in being a safer place for minority groups, marginalized people and different subcultures.

The Diversity Roadmap[4] , a tool created by the Swiss live music association PETZI in collaboration with other Swiss feminist and music organisations, is an example of this reflection that takes place within live music venues and clubs to include all experiences and realities in their their programming as well as in their teams.



As the academic Jodie Taylor explains: ***"It was only as a musician and music lover that I was allowed to be fluid: to interpret and reinterpret, to create and recreate. Music allowed me to perform gender and express sexuality in multiple ways that were unavailable to me in daily life [...] Several years later, I started going to queer bars and clubs. These spaces were meaningful, not least because they allowed me to meet and socialise with like-minded people, but that socialising was almost always accompanied by music and dancing"*** [5].

3 http://www.live-dma.eu/club-culture-berlin-facts-figures/
4 http://www.live-dma.eu/the-diversity-roadmap/
5 TAYLOR, Jodie. *Playing it Queer: Popular Music, Identity and Queer World-Making* - Peter Lang: Bern, 2012. 243 pages.

HUMAN RESOURCES: WORKING BEHIND THE SCENES

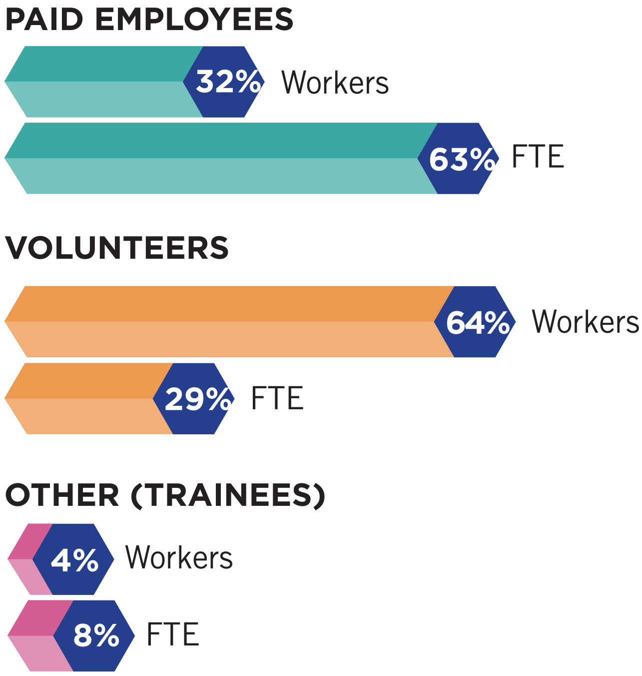
In total, **93,000** people are actively involved in one of the **2,597** music venues that are part of Live DMA, excluding the artists and the audiences. The venues human resources consist of well over **87,000** workers that is equivalent to well over **17,000** fulltime equivalent (FTE). The music venues are mostly run by professional paid staffs, but the amount of tasks done by volunteers is essential in most regions, specifically for private non-profit venues and mostly for smaller venues. Also interns and trainees add an important contribution.

In total, well over **27,500** paid professionals (11,000 FTE), and over **56,000** volunteers (5,000 FTE), work at the venues. Additionally there are almost **3,500** other workers (1,350 FTE) active, such as interns and trainees and **8,690** volunteers in France, which cannot be defined as workers under the French law.

Because volunteers in average work less hours per week than paid staff in the Survey results we see that volunteers are the highest share of all workers expressed in persons, but paid employees are the highest share of all workers expressed in working hours (full time equivalent). Almost two third **(63%)** of all the work in music venues and clubs is paid work.

There is a high diversity of volunteer engagement in music venues in Europe, which is related to different legal status of music venues, different audience capacities and different volunteers culture and legislation from one country to another.

Division of Paid and Volunteers Work(ers) - All venues



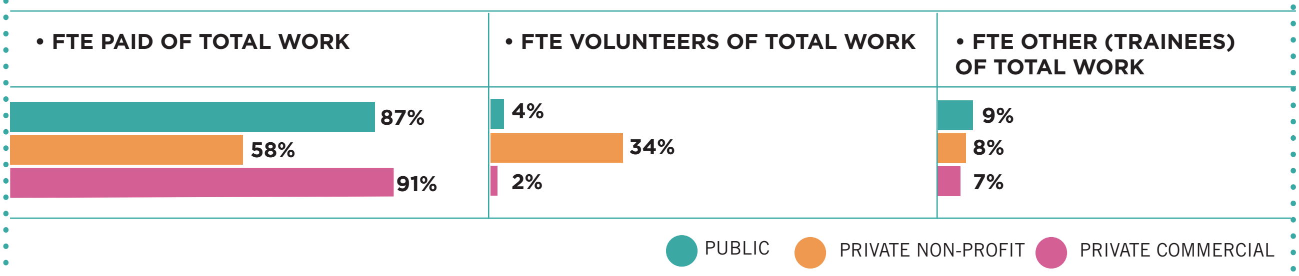
A

Volunteer work is very important especially for private non-profit music venues:

- In private non-profit venues **70%** of all workers are volunteers, who do **34%** of all the work (FTE)
- In public venues **33%** of all workers are volunteers, who do **4%** of all the work (FTE)
- In private commercial venues **13%** of all workers are volunteers, who do **2%** of all the work (FTE)

The Survey results also show that mostly smaller private non-profit venues work with volunteers, and some larger private non-profit venues do not have volunteers at all.

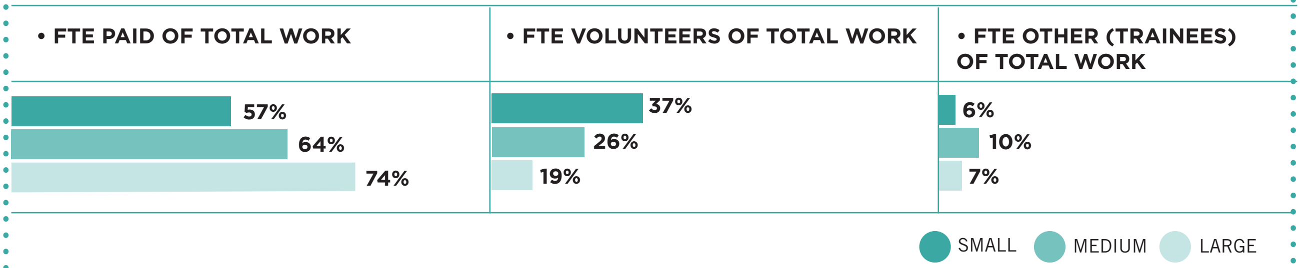
Division of FTE Work per Legal Status



B

Volunteer work is very important especially for smaller music venues where volunteers do **37%** of all the work (FTE), comparing to **26%** in medium-sized venues and **19%** in larger venues.

Division of FTE Work per Audience Capacity



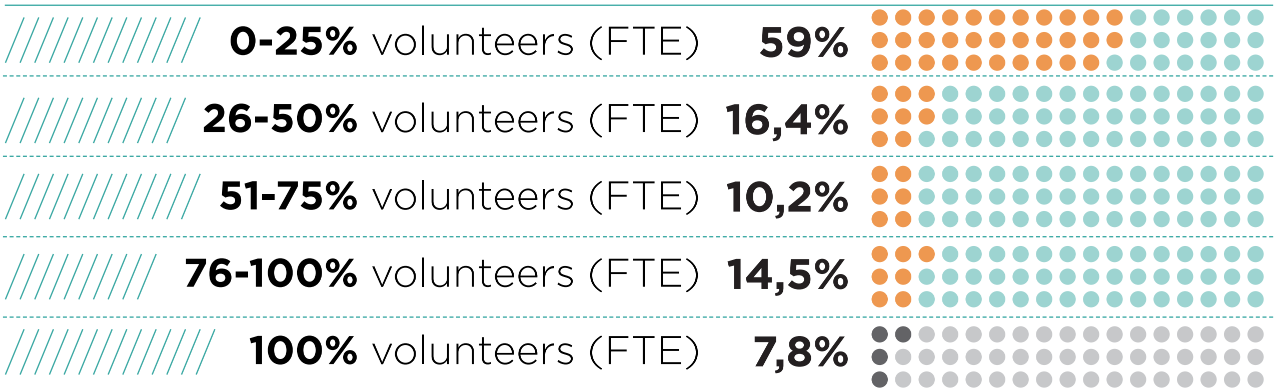
C

The amount and method of volunteers' engagement also differs per region depending on the laws and regulations. In France, because of a different legislation, volunteers cannot receive any compensation and cannot take a task or a job that can be done by an employee. Therefore they are not counted as workers and expressed in FTE in our Survey results, but they are included in the total human resources, because they do give an important contribution to the French music venues.

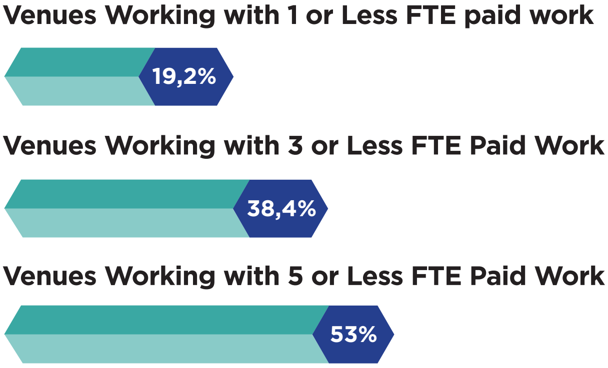
In most European countries, especially for venues with a private non-profit legal status, volunteers are integrated in the venues' culture and businessmodels as valuable workers.

Although volunteers' 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 or free concert visits, access to catering, and other group activities. Also, they often carry out essential tasks during concert hours such as handling the bar, wardrobe, and helping out with the lights and sound Although the concrete impact of volunteering on people's lives is intangible, notably due to the diversity of profiles and tasks volunteers undertake, we can count among the benefits of volunteering: social experience and emancipation, professional networking, skill development and active participation in society.

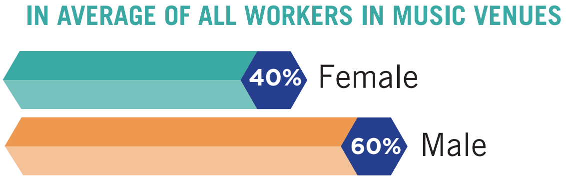
Share of Venues with Certain Share of FTE Volunteers Work



Over **200** of Live DMA live music venues and clubs (**7,8%** of total) are exclusively run by volunteers. Many music initiatives are based on the free commitment of music organisers, and many professionals started their career as volunteers. Policy makers should take them into account with a specific support and avoid to create administrative burdens for volunteerly-runned organisations.



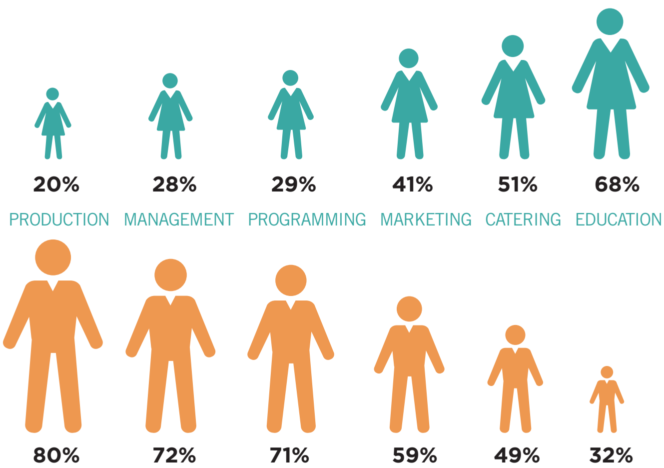
More than half of Live DMA's music venues are micro-organisations working with 5 or less than 5 FTE paid work. Regulations asking for too strict measures to comply with may harm the competitiveness of such organisations. Employment subsidies can therefore be very helpful for music venues and clubs.



The Survey includes a new question about the balance of female/male workers in the music venues and clubs. These first results are based on available data from Belgium, Denmark, Finland, France, The Netherlands, Spain and Sweden.

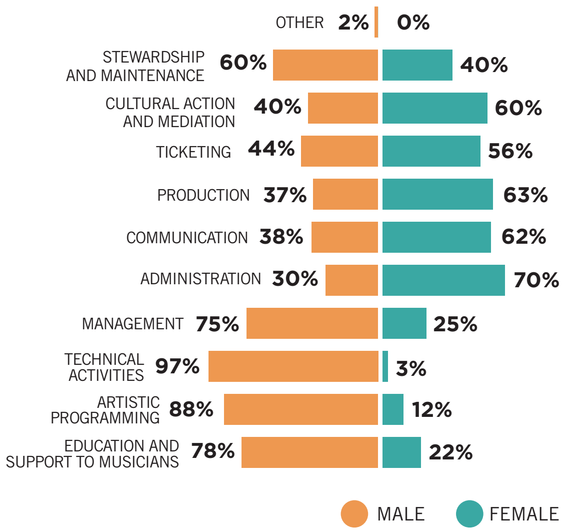
Two studies from our members in France (FEDELIMA) and The Netherlands (VNPF) give more insights about the repartition of female/male workers in their music venues:

DISTRIBUTION MALE/FEMALE WORKERS PER FUNCTION



Extracted from *Dutch Live Music Venues and Festivals - Facts & figures 2018'* (VNPF, 2019)

SHARE OF PERMANENT STAFF PER SEX AND PER FAMILY OF TRADES



Extracted from French *L'emploi permanent dans les lieux de Musiques Actuelles* - Fedelima (2018)

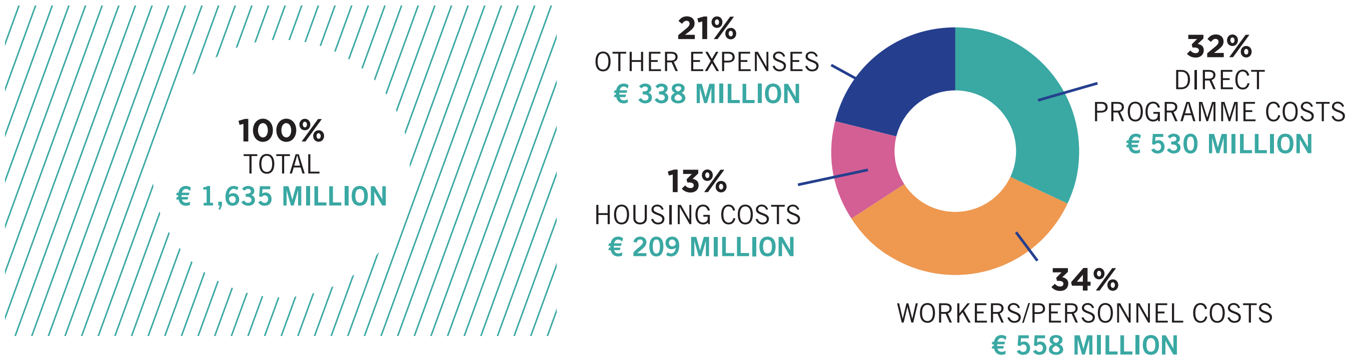
These studies show similar results: most of the jobs occupations are highly gendered. The family of trades has an impact on the gross wages of employees. In this sense, the management and programming trades are those with the highest remunerations, and these are the positions most occupied by men.

Live DMA members develop several programmes and initiatives to empower gender minorities within the live music sector. Find more information about these initiatives on our website.

INCOME AND EXPENDITURE

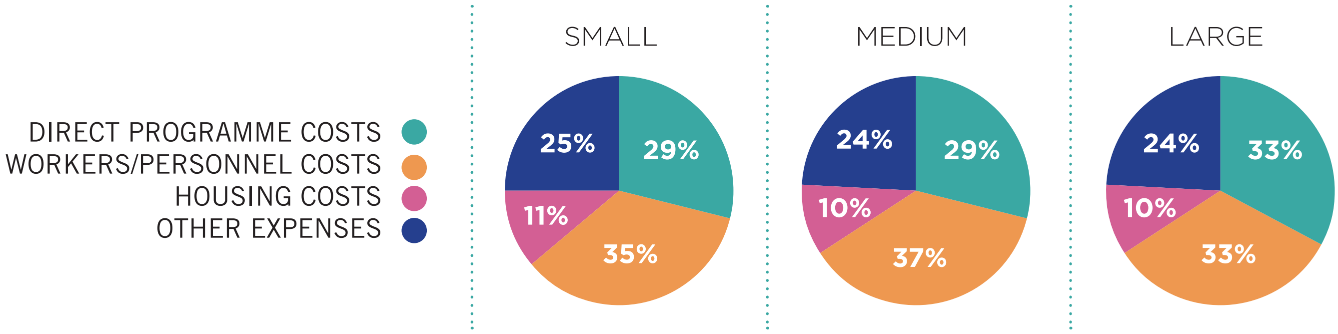
In total the **2,597** music venues represented by Live DMA overview **1.8 billion** euro turnover per year. The average **expenditure** of music venues acoss Europe is **32%** spend on direct programme costs, **34%** on workers/personnel costs, and **13%** on housing costs.

Share of Expenditure - All Venues

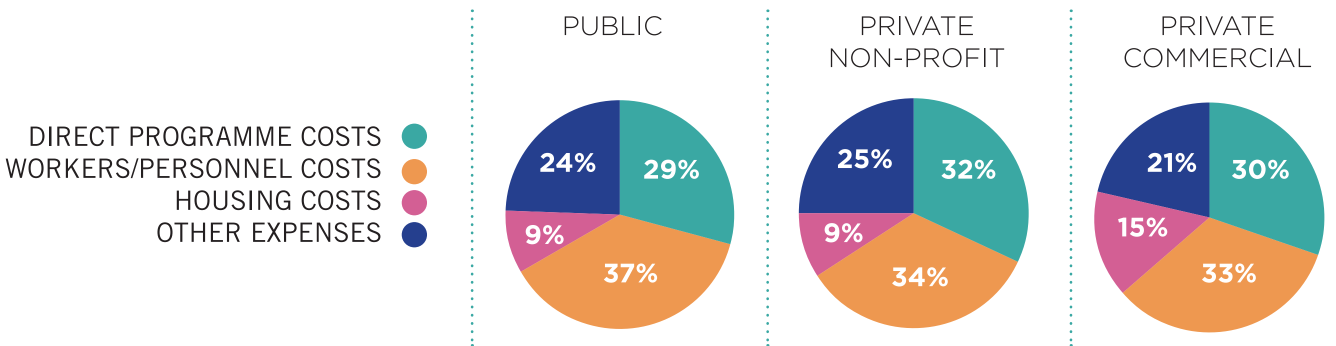


The Survey results show us that, on the one hand, **the expenditure is very much alike for all types of venues**, despite their audience capacity, region and legal status. On the other hand the **income of the venues is very different, depending mostly on their legal status and audience capacity.**

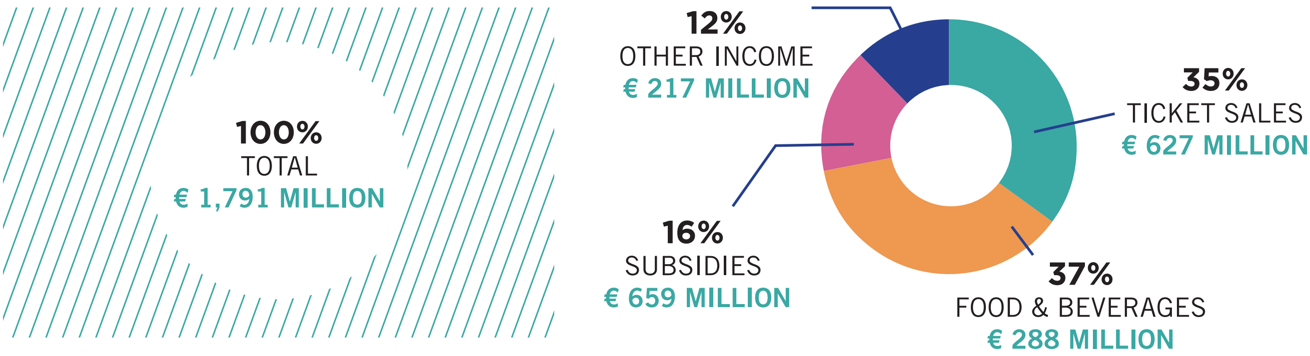
Share of Expenditure Per Audience Capacity



Share of Expenditure Per Legal Status

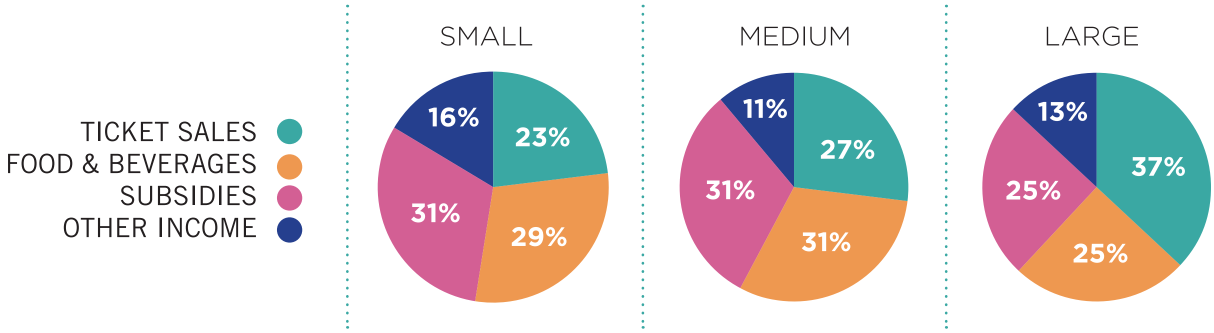


Share of Income - All Venues



The average **income** of music venues acoss Europe consists of **35%** from ticket sales, **37%** from food & beverages, and **16%** from subsidies. It is important here to point out this is an average of a diverse mix of venues with different legal status and audience capacity, so it is not very representative for individual music venues.

Share of Income Venues Per Audience Capacity



The income model depends on the venues audience capacity:

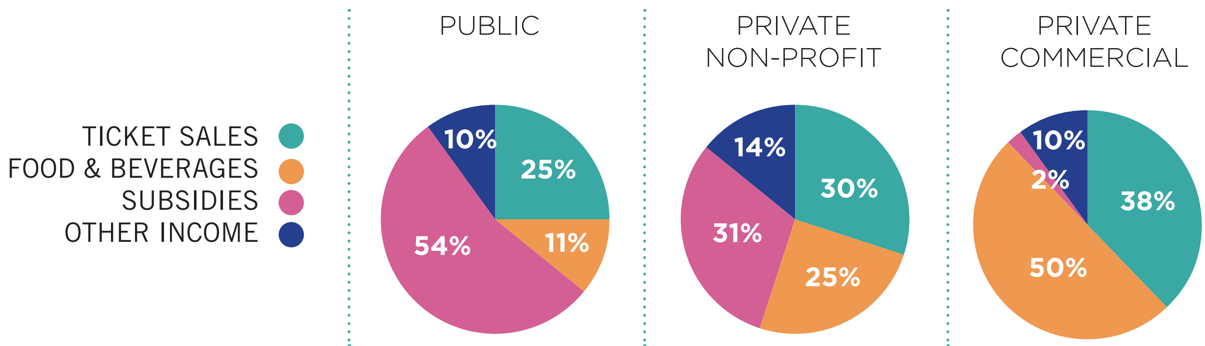
• For small venues, in average **52%** of their income comes from audience spendings (23% ticket sales + 29% catering sales)

• For medium venues, in average **58%** of their income comes from audience spendings (27% ticket sales + 31% catering sales)

• For large venues, in average **62%** of their income comes from audience spendings (37% ticket sales + 25% catering sales)

Large venues generate more income from ticket sales and food and beverage. Smaller venues cannot generate as much income from audience, because they have less audience capacity, and organise more often free events.

Share of Income Venues Per Legal Status



The income of venues with different legal status is very different:

• For **private commercial** venues **88%** of their income comes from audience spendings (38% ticket sales + 50% catering sales)

• For **private non-profit** venues **55%** of their income comes from audience spendings (30% ticket sales + 25% catering sales)

• For **public venues** only **36%** of their income comes from audience spendings (25% ticket sales + 11% catering sales)

Non-profit venues (public + private) get more **subsidies**: for public venues in average **54%** of their income is subsidy, compared to private non-profit venues **(31% subsidy)** and private commercial venues **(2% subsidy)**.

When we compare the direct programme costs to the income of ticket sales we can see that, in average, the ticket sales cover all the income for the artists **(105%)**, but for many smaller venues the ticket sales do not cover the programme costs. In average, large venues ticket sales cover **116%** of the direct programme costs. For medium venues this is **102%**, but for small venues only **82%** of the programme costs is covered by ticket sales.

Ratio Between Ticket Sales' Income and Direct Programme Costs

	SMALL	MEDIUM	LARGE	ALL
% PROGRAMME COSTS OF TICKET SALES	122%	98%	86%	95%
% TICKET SALES OF PROGRAMME COSTS	82%	102%	116%	105%

Since **52%** of the venues are non-profit, they do not aim to make any benefit. The other **48%** have a commercial status and are allowed to make profit, but as the numbers show, the profit generated is very low or barely existent and most income is invested back in the function of the music venue. The income from ticket sales is used to cover the programme costs and turnover from food and beverage sales. Subsidies are often essential to cover necessary expenses such as employment and accomodation costs.

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 cover housing costs, employees costs, music programme and other activities like community work and educational activities.

In general, the live music venues and clubs' financial situation is fragile as they are very dependent on subsidies, volunteers' work, audience's spendings (catering) and rules and regulations to survive, which of course represents precarious situations for the staff and the emerging talents.

In many cities across Europe external factors tend to further weaken this fragile situation. Gentrification and the concentration of activities in urban areas impact the live music scenes: housing costs increase, noise regulations and the regulation on opening hours become more strict, noise complaints become more common as more people live near a live music scene.

Want to know more? Check our online resource here
http://www.live-dma.eu/prevent-conflicts-between-live-music-places-and-local-authorities-or-neighbours-the-club-kataster-project/

KEY NUMBERS of MUSIC VENUES

PER REGION - PER LIVE DMA MEMBER

The Survey results teach us that the differences between music venues in the different European regions are mostly related to their legal status (public/non-profit/commercial), audience capacity (small/medium/large) and regulations and level of support by governments. By looking at the type of venues per legal status and in different régions, we notice that:

• In Belgium, Spain, Sweden and UK the Live DMA members **do not** represent any **public venues**, while other countries (France, Denmark, Norway, Finland) have **20%** or more public venues.

• In Belgium, Switzerland, France and Netherlands the Live DMA members **do not** represent any **private commercial venues**, while other countries (UK, Germany, Finland) have more than **50%** commercial venues, **up to 90%** in Spain.

• In many regions the most important type of venue the Live DMA members represent is the **private non-profit venue**, with a share of **70%** and more in Sweden, Denmark, France, Switzerland, Belgium and the Netherlands.

Please note that the Survey only takes into account the members of the live music associations Live DMA gathers. For instance, in France and Switzerland, FEDELIMA and PETZI do not accept private commercial venues or clubs as their members, although such organisations can be found in the territories they cover.

LIVE DMA MEMBER	REGION	PUBLIC venues	PRIVATE NON-PROFIT venues	PRIVATE COMMERCIAL venues
CLUBCIRCUIT	Belgium (F)	0%	100%	0%
COURT-CIRCUIT	Belgium (WB)	0%	100%	0%
PETZI	Switzerland	6%	94%	0%
FEDELIMA	France	23%	77%	0%
VNPF	The Netherlands	2%	96%	2%
DANSK LIVE	Denmark	21%	74%	5%
SVENSK LIVE	Sweden	0%	70%	30%
NKA	Norway	21%	47%	32%
LIVEFIN	Finland	20%	30%	50%
LIVEKOMM	Germany	11%	30%	59%
MUSIC VENUE TRUST	UK	0%	24%	76%
KULTURA LIVE	Basque Country	7%	13%	80%
ACCES	Spain	0%	10%	90%
ASACC	Catalonia	0%	0%	100%

Taking into account the different legal status and diversity of audience capacity in different regions, we have attached a more detailed overview of the Survey data results per Live DMA member, including some totals and averages and main characteristics of the venues in these regions or countries, which can be used for representation and to compare venues across Europe. **See Attachment 4**

ABOUT LIVE DMA AND THE SURVEY

Live DMA is a European non-governmental network working to support and promote the conditions of the live music sector. Live DMA is by nature an international collaboration network based on shared visions and values. The network is composed of 19 members situated in 15 countries. The members are regional and national live music associations that represent more than 3000 music venues, clubs and festivals located all over Europe.

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

By gathering independent players from the entire live music sector, Live DMA acts as a collective voice in order to work on European challenges and highlight the substantial cultural and social work of live music professionals.

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.

5 Music Rights

THE RIGHT FOR ALL CHILDREN AND ADULTS

1. To express themselves musically in all freedom
2. To learn musical languages and skills
3. To have access to musical involvement through participation, listening, creation, and information

THE RIGHT FOR ALL MUSICAL ARTISTS

4. To develop their artistry and communicate through all media, with proper facilities at their disposal
5. To obtain just recognition and fair remuneration for their work

The International Music Council has proclaimed and works towards the advancement of Five Music Rights. As a member of the European Music Council, Live DMA commits to these Five Music Rights.

«The International Music Council advocates access to music for all. It has proclaimed and works towards the advancement of the Five Music Rights.»

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

LET'S ACT!

The context related to live music venues and clubs is strongly connected to the implementation of adapted policies, funding and regulation; from local, to national and European level. An effective environment for the live music scenes relies on the good balance between these double triangle relationships.

The recommendations in **attachment 1** aim to include the key facts of the live music venues and clubs detailed in this report, in order to develop favourable conditions for the development and sustainability of our sector.

These recommendations are extracted from previous campaigns and consultations in which Live DMA was involved, such as the Music Moves Europe structured dialogue, the European elections campaign, and the "Music is not Noise" working group. Some recommendations are also extracted from the European Agenda for Music, a tool that aims to converge the European music sector's many voices in order to establish an ongoing dialogue between policy makers and the music sector.

These general recommendations can be developped and adapted taking into account local and national specificities. A series of role models and best practice studies are also available on the Live DMA resource platform. For more insights and details, do not hesitate to contact Live DMA's coordination team and our different members at national level (contacts at the end of the report).

SURVEY POPULATION

In this study, Live DMA represents 2597 music venues and clubs in 15 different countries. This study shows the results of the latest survey about the year 2017, that was carried out from September 2018 until May 2019, with addition of data 2016 of LiveKomm and PETZI venues, to complete the 2017 data. Live DMA's members have sent the same 25 questions to 1943 music venues and clubs of 14 different networks in 11 countries: Belgium, Denmark, Finland, France, Germany, Netherlands, Norway, Sweden, Switzerland, Spain and UK. Data of 604 venues were collected (31% response), which are in this study extrapolated to totals per Live DMA member and to all 2597 music venues within the Live DMA network.

LIVE DMA MEMBER	REGION	POPULATION	RESPONSE	%
DATA 2017 VENUES				
ACCES	Spain	110	31	28%
ASACC	Catalonia	69	31	45%
CLUBCIRCUIT	Belgium (Flanders)	15	13	87%
COURT-CIRCUIT	Belgium (Wallonia-Brussels)	36	9	25%
DANSK LIVE	Denmark	76	43	57%
FEDELIMA	France	142	106	75%
KULTURA LIVE	Basque Country	15	6	40%
LIVEFIN	Finland	24	10	42%
MUSIC VENUE TRUST	UK	460	89	19%
NKA	Norway	165	66	40%
SVENSK LIVE	Sweden	150	23	15%
VNPF	The Netherlands	58	51	88%
DATA 2016 VENUES				
LIVEKOMM	Gemany	510	46	9%
PETZI	Switzerland	113	80	71%
TOTAL		**1943**	**604**	**31%**

SURVEY METHODOLOGY

Since 2012, Live DMA collects data to represent the venues and clubs on a European level and compare them on different scales. The Survey measures:

- **ORGANISATION:** legal status, audience capacity
- **ACTIVITIES:** functions, music events, music performances and audience visits
- **HUMAN RESOURCES:** paid staff, volunteers and other workers (interns and trainees) in persons and calculated in working hours to fulltime equivalent (FTE)
- **FINANCE:** programme costs, employment costs, housing costs, ticket sales, subsidies, food & beverages sales, total income, total expenditure and financial result.

Questions and definitions are synchronized for all participating Live DMA members to create useable totals and average numbers.

For a list of definitions of the Survey questions and main terminology, see **attachment 2.**

The Survey is repeated every year to keep track of the most actual numbers and situation of the venues, but also with the aim to discover trends and developments. Every year more countries and venues participate in the Survey.

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DISCLAIMER

In spite 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.

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Attachment 1: Recommendations

RECOMMENDATIONS RELATED TO DATA COLLECTION

"Create an independent body such as a Music Observatory as a European base for data, and research on the music sector and market."

"Increase, standardise and compare data collection at European level so as to guarantee consistency and reliability in the data collected."
Extracted from
the *European Agenda for Music*

• Develop The Survey methodology and support the initiative towards other music sub-sectors (shared indicators, capacity building, development & structuration of the music sector)
• Develop qualitative research and partnership with the research sector (through dedicated programme and funding such as Horizon 2020)
• Develop flash studies about music and practices and audience patterns in an inclusive way (not only as consumers)
• Develop flash studies/market analysis about artistic diversity and circulation within live music in Europe
• Develop flash studies about employment, skills and competences, including the volunteers

RECOMMENDATIONS RELATED TO ACCESS TO FUNDING

• Support Creative Europe as the dedicated programme for the cultural and creative sectors in Europe, with an effective budget, in order to implement its different actions and enable a relevant impact on the sector. We support the European Parliament's proposal to double the budget for the Creative Europe programme.
• Develop awareness and opportunities for the music sector to apply to other European programmes such as Erasmus +, Horizon 2020, URBACT, and the structural and regional funds.
• Support Music Moves Europe to facilitate access to funding for music operators, especially music venues. The pilot call 2019 for the cooperation of small music venues is a good example that needs to be sustained.
• Select more projects per call. Small organisations also have reduced teams, and they do not invest time for an application if the success rate is very low.
• Give a high percentage of European co-financing per project (at least 80%).
• Guarantee a pre-financing to avoid cashflow issues.

RECOMMENDATIONS
RELATED TO DIALOGUE & MUSIC POLICIES

"Further explore the social, societal and economic impact of music at municipal, regional and national levels and encourage governments to invest in music."

• Develop music policies that highlight the public interest rather than the economic potential of the sector

• Support the diversity (in terms of art, culture but also organisations) of the music sector, endangered by the development of global companies.

• Support dialogue and cooperation between the public and private organisations rather than competition, to strenghten the impact of the music policies.

• Make music (venues and clubs) part of the city plan. In order to do so, we recommend bringing decision makers, cultural players, and citizens together for consultations and exchange on smart policies regarding music and city planning. Support the creation of a forum that offers the possibility to exchange knowledge between policy makers and the music sector. Such a forum can take form of a night embassy, night council, local network, or any other organ that represents the local music sector and is recognised by it. In many bigger European cities, these organs have been existing and operating for several years. Examples can be local networks (Berlin Clubcommission or Zurich Bar and Clubcommission), multi-partner projects (Plateforme de la Vie Nocturne), dialogue plans (French SOLIMA), or the presence of a Night Mayor (example: London Amsterdam, Mannheim, Groningen).

• The instauration of informal meetings/yearly reception where policy makers visit the local live music venues and clubs. On occasions such as the Open Club Day, venues and professionals get the chance to demystify potential negative stereotypes related to their place and show what can be done inside a live music place. Together with the sector, city officials, politicians, and policy makers can raise the ambition of these local live music places for their cities/communities

"Promote a sense of ownership among citizens by encouraging them to participate in music projects artistically, financially or as volunteers." **Extracted from the *European Agenda for Music***

RECOMMANDATIONS
RELATED TO FUNDING & REGULATIONS

"Recognise that music venues contribute to culture and allow them to access funding and/or beneficial tax regimes." **Extracted from the *European Agenda for Music***

• The implementation of the Agent of Change into law in order to protect and preserve the cultural values of venues and clubs and the economic, cultural and social tissue of cities and communities. The example of the implementation process in the UK can be viewed in the webinar produced by Live DMA. The Agent of Change is a positive approach that makes policy makers, the sector, and urban planners work together.

• The creation of a sound proofing/infrastructure fund by making available public funds for soundproofing allows to protect the ecosystem of neighbourhoods. Such a fund creates a positive story of investing in the vibrancy and livelihood of neighbourhoods. Existing examples of such funds are the Lärmschutzsfonds Berlin and the Barcelona City Council Subsidies for sound investments for live music venues.

• The recognition of live music venues as cultural spaces should have regulatory effects at local level on lowering VAT and housing costs, which would prevent from the fragility of many music venues and clubs. Opening hours, restricting age access must also be discussed with the local representatives of music venues and clubs to find a common agreement.

You can find out more about Live DMA's advocacy work and our recommendations:

• **Music is not Noise**, results of Live DMA's Working Group and recommandations towards the World Health Organisation
• The **European elections campaign** and **letter to the Members of the European Parliament**
• Co-statements to the European Institutions about the future of **Creative Europe** and **Music Moves Europe**
• ***European Agenda for Music*** , coordinated by the European Music Council.

Attachment 2: DEFINITIONS OF SURVEY QUESTIONS

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.

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 concerns the attendants that pay any form of admission fee.

Free visits concerns the attendants 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.

Human resources include all the venues and clubs' workers (paid employees, 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 venues own payroll, hired staff, subsidized employees and freelancers. It excludes 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. It also excludes the performing artists and artists' own crew.

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

Total income is the sum of the venues ticket sales, food & beverage, subsidies and all other income.

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

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

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

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

Direct 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.

Workers/Personnel costs are all costs for employees, freelancers, volunteers and others working to make the music activities 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, child care, 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.

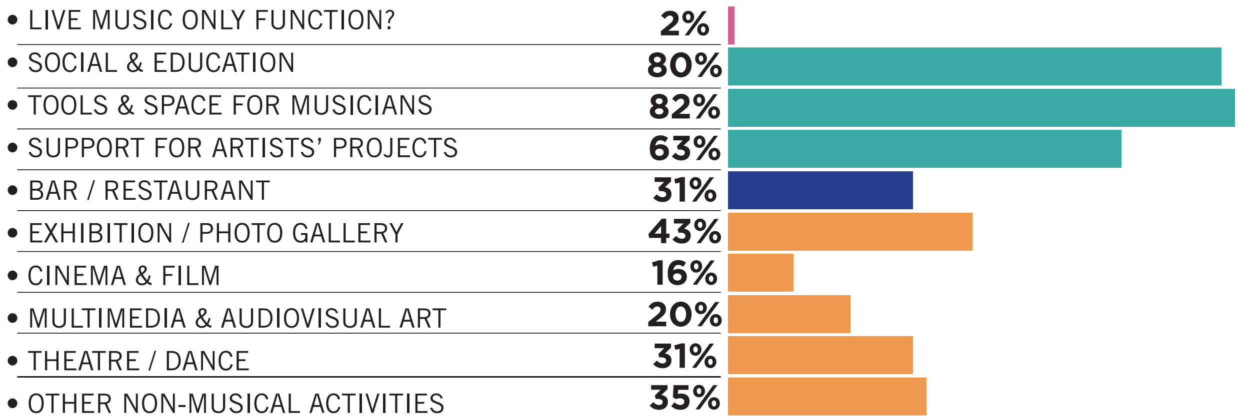
Attachment 3A: Overview PUBLIC Venues

8% of all Live DMA venues are public music venues, but are only common in the venues' associations in Denmark, Finland, France, Germany and Norway, and a few venues in the French part of Basque Country, the Netherlands and Switzerland.

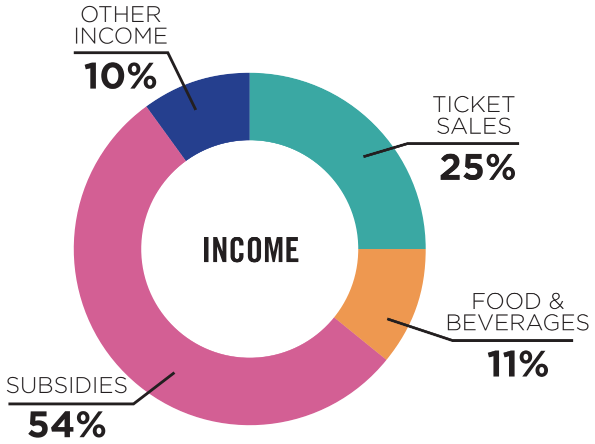
The public non-profit venues in the Live DMA network have a median of **600** audience capacity, so are relatively large comparing to other Live DMA venues. The average public venue programmes **98** music events per year, with **165** artist performances, which attract well over **25.000** people per year. **33%** of the public music venues also organise festivals.

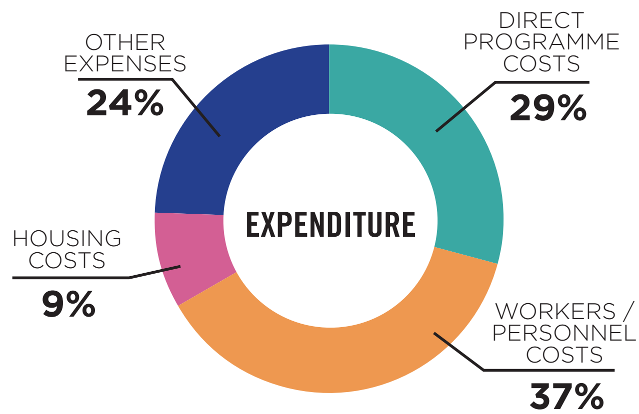
The venues do much more than live music alone, and especially the public venues have a relatively high share of social and educational activities, tools and spaces for musicians and support for artists projects.

VENUES FUNCTIONS PER LEGAL STATUS

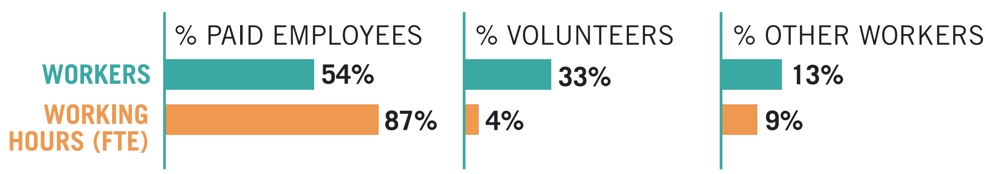


Public music venues are to some extend initiated and paid by the public authorities, and therefore subsidy is a high share **(54%)** of the total income of the public venues in average. The venues generate also some income from the audience **(36%)** by ticket and catering sales. Although the income is very different, for public venues the share of expenditure spend on the music programme, workers and accommodation is not much different from private commercial and private non-profit venues.





Share of Paid and Volunteers Work(ers) - Public Venues



There is a high amount of volunteers **(33%)** helping in public venues, but volunteers' work is a very low **(4%)** share of the actual working hours. Most work **(87%)** is done by paid professionals. In total **39%** of the workers in public venues are female.

Based on collected data (years 2016 and 2017) of 63 public non-profit music venues part of Live DMA.

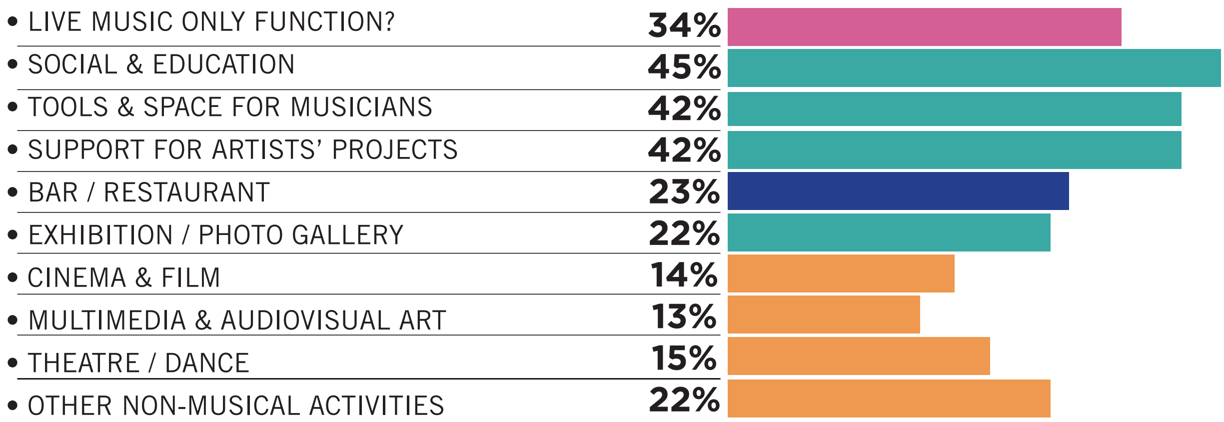
Attachment 3B : Overview PRIVATE NON-PROFIT Venues

44% of all Live DMA venues are private non-profit music venues. They are the most common legal status of venues in the venue associations in Belgium, Denmark, France, Netherlands, Sweden and Switzerland, and are also present in the networks in the UK, Finland, Germany, Norway, Basque Country and the rest of Spain.

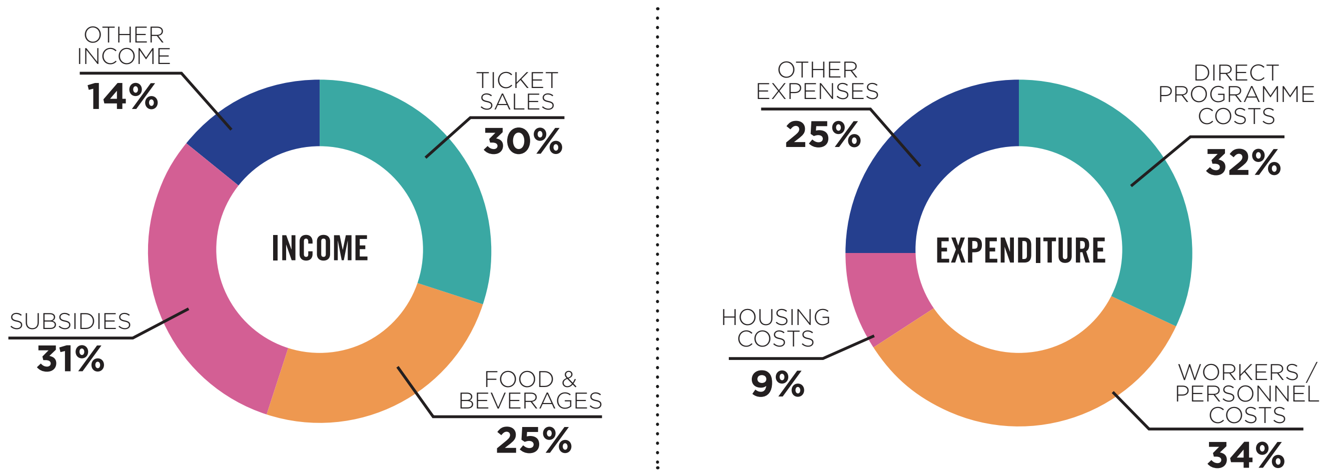
The private non-profit venues in the Live DMA network have a median of **399** audience capacity. The average private non-profit venue programs **99** music events per year, with **218** artist performances, which attract well over **24.000** people per year. **47%** of the private non-profit music venues also organise festivals.

The venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as the ones listed below.

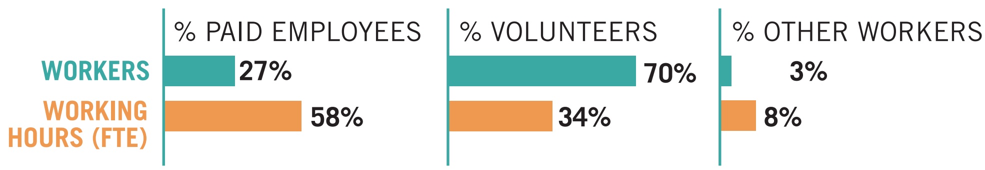
VENUES FUNCTIONS PER LEGAL STATUS



Private non-profit music venues are independent organisations, but may receive subsidies from local, regional or national governements. The income of private non-profit venues is in average a mix of subsidy **(31%)** and income from the audience **(55%)** by ticket and catering sales, but the share of subsidy is much lower for larger (1000+) private non-profit venues, than for smaller venues. The share of expenditure spent on the music programme, workers and accommodation is not much different overview from private commercial and public venues.



Share of Paid and Volunteers Work(ers) - Private Non-Profit Venues



There is a very high amount of volunteers (**70%** of all workers) working in private non-profit venues, and volunteers work is an important (**34%**) share of all working hours. Still the most work (**58%**) is done by paid professionals. In total **40%** of the workers in private non-profit venues are female.

Based on collected data (years 2016 and 2017) of 381 private non-profit music venues part of Live DMA.

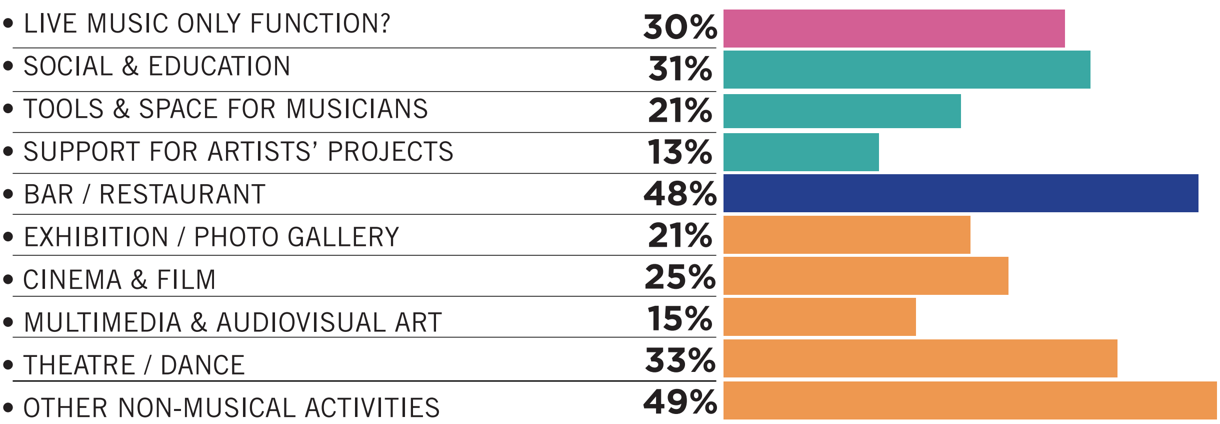
Attachment 3C: Overview PRIVATE COMMERCIAL Venues

48% of all Live DMA venues are **private commercial** music venues, most common in the venues' associations in Germany Spain and the UK, and are also present in the networks in Northern Europe in Denmark, Finland, Norway and Sweden.

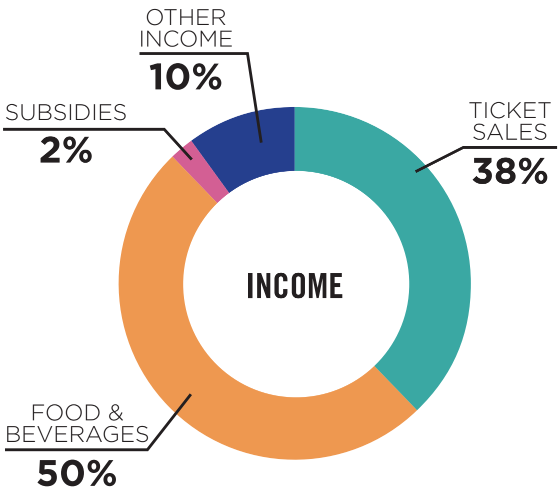
The private commercial venues in the Live DMA network have a median of **300** audience capacity. The average private commercial venue programs **211** music events per year, with **473** artist performances, which attract well over **37.000** people per year. **32%** of the private commercial music venues also organise festivals.

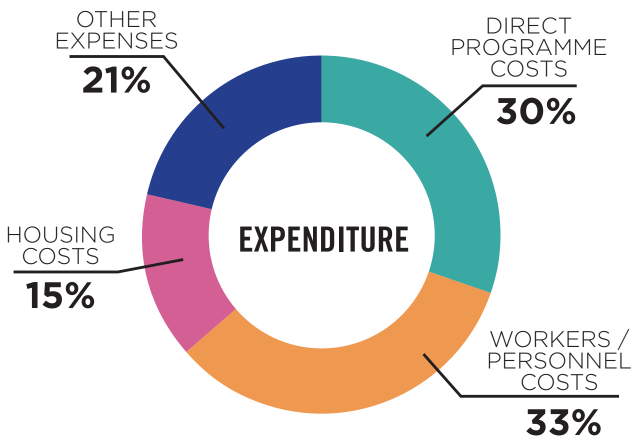
The venues do much more than live music alone, and are also involved in educational, social, artistic (to a lesser extent) and multi-disciplinary activities, and specifically private commercial venues often combine the function of music venue with a bar or restaurant.

VENUES FUNCTIONS PER LEGAL STATUS

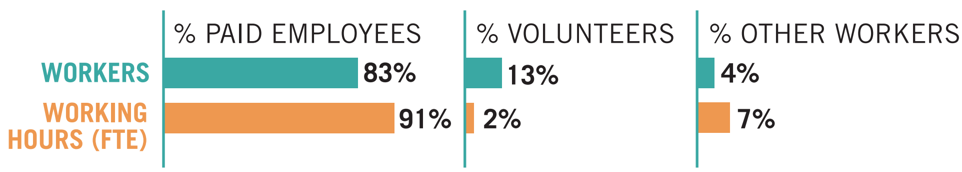


Private commercial music venues are for-profit, but most of these venues don't make any profit and invest all income back in the function of music venue. Since the private commercial venues mostly don't receive subsidies (**2%** of total income) , they rely on audience spendings (**88%**) on tickets and food and beverages. Although the income is very different, for private commercial venues the share of expenditure spent on the music programme, workers and accommodation is not much different from non-profit venues.





Share of Paid and Volunteers Work(ers) - Private Commercial Venues



There is a low amount of volunteers (**13%**) involved in the private commercial venues, and the share of volunteers work of all working hours is very low (**2%**). Most work (**91%**) is done by paid professionals. In total **41%** of the workers in private commercial venues are female.

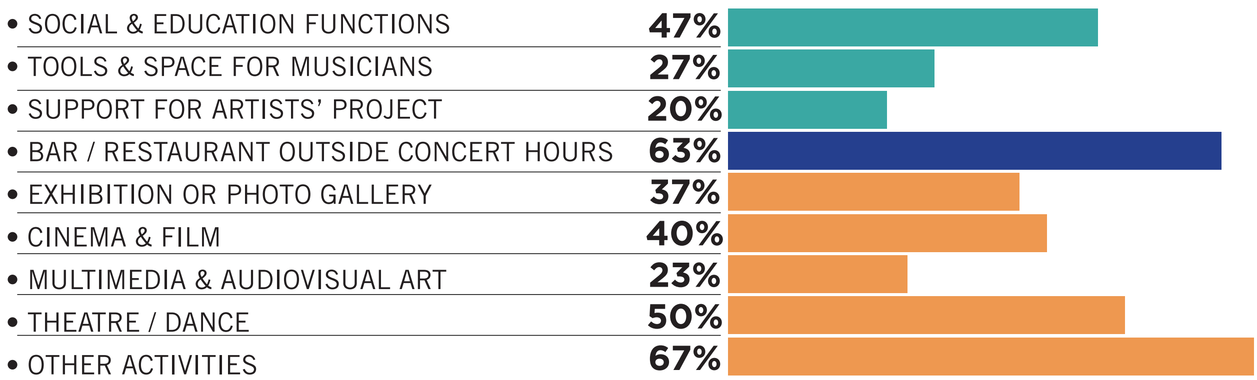
Based on collected data (years 2016 and 2017) of 193 private commercial music venues part of Live DMA.

Attachment 4A: Overview ACCES Venues

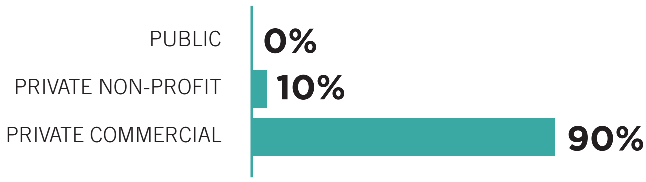
ACCES represents **110 music venues** in **Spain**, excluding the regions of Catalonia and the Basque Country, which are represented by Live DMA members ASACC and Kultura Live. ACCES music venues have a median of **265** audience capacity, so are generally small. Together the venues present around **18,000** artist performances per year, which attract well over **2.8 million** visits. Also **65%** of the music venues organise festivals.

The venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

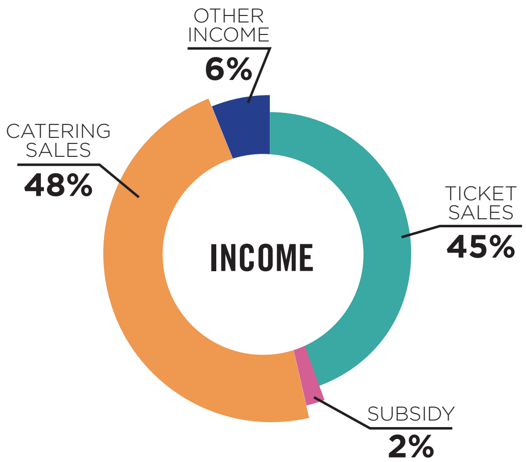
DIVERSITY OF FUNCTIONS

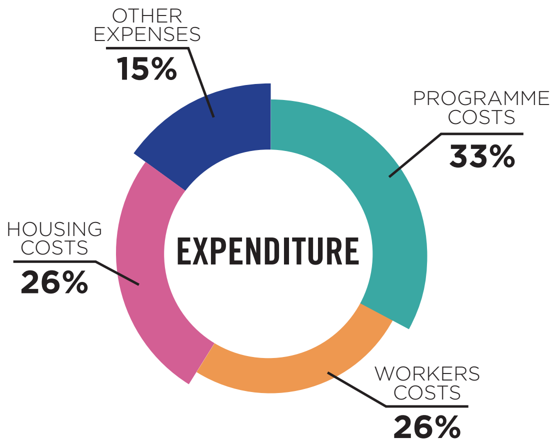


LEGAL STATUS

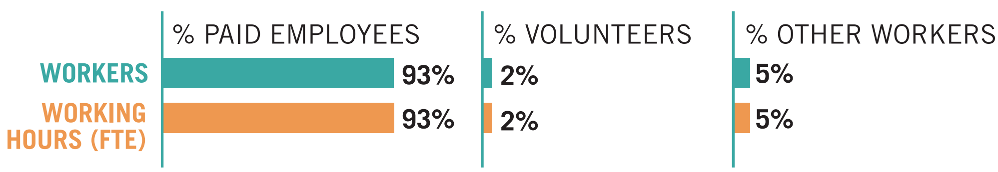


ACCES music venues are for **90%** private commercial venues, with a total income of well over **28 million** euro. Subsidy is only **2%** of the total income of all venues. The venues generate most income from the audience **(93%).** This money is mostly spent to cover the costs of the music programme, workers and accommodation:





Share of Paid and Volunteers Work(ers)



The share of volunteers is very low in Spanish music venues (**2%** of the total workforce). Of the **1,600** total workers in ACCES venues, **1,500** are paid workers. In total **41%** of the workers are female.

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

Based on the data (year 2017) of 31 ACCES music venues, collected during 2018, and extrapolated to data of 110 music venues part of ACCES and Live DMA in 2017.

Attachment 4B: Overview ASACC Venues

Associació de Sales de Concerts de Catalunya

ASACC represents **69 music venues** in Catalonia. They have a median of **150** audience capacity, so are generally small. Together the venues present well over **30,000 artist performances** per year, which attract almost **4 million visits**. Also **45%** of the music venues organise festivals.

The Catalonian venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

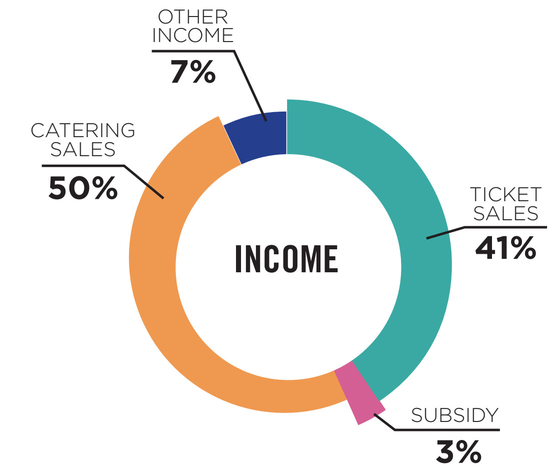
DIVERSITY OF FUNCTIONS

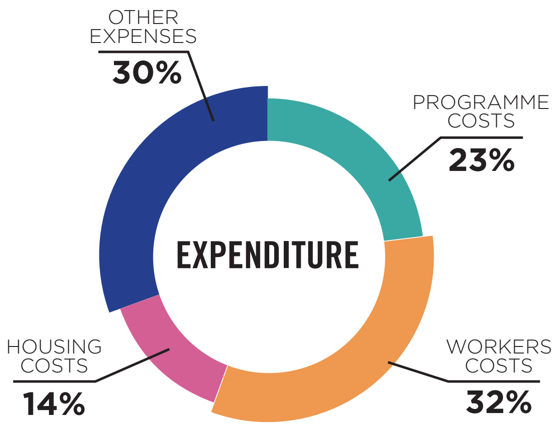
• SOCIAL & EDUCATION FUNCTIONS	52%
• TOOLS & SPACE FOR MUSICIANS	35%
• SUPPORT FOR ARTISTS' PROJECT	26%
• BAR / RESTAURANT OUTSIDE CONCERT HOURS	61%
• EXHIBITION OR PHOTO GALLERY	23%
• CINEMA & FILM	26%
• MULTIMEDIA & AUDIOVISUAL ART	32%
• THEATRE / DANCE	42%
• OTHER ACTIVITIES	61%

LEGAL STATUS

PUBLIC NON PROFIT	0%
PRIVATE NON-PROFIT	10%
PRIVATE COMMERCIAL	90%

ASACC music venues are for **90%** private commercial venues, with a total income of well over **67 million euro.** Subsidy is only **3%** of the total income of all venues. The venues generate most income from the audience **(91%)**. This money is mostly spend to cover the costs of the music programme, workers and accommodation.





Share of Paid and Volunteers Work(ers)

	% PAID EMPLOYEES	% VOLUNTEERS	% OTHER WORKERS
WORKERS	94%	1%	5%
WORKING HOURS (FTE)	92%	2%	6%

The share of volunteers is very low in Catalonian music venues (**1%** of the total workforce). Of the **1,400** total workers in ASACC venues, **1,350** are paid workers.

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

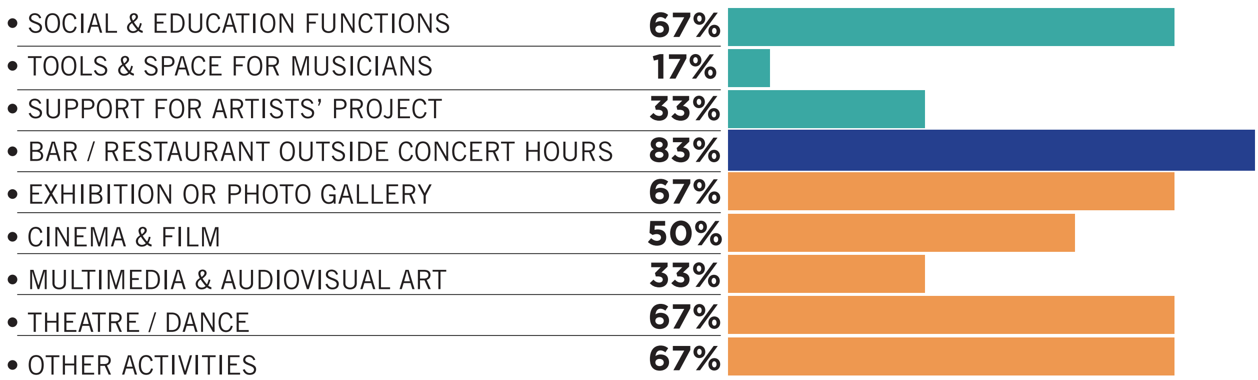
Based on the data (year 2017) of 31 ASACC music venues, collected during 2018, and extrapolated to data of 69 music venues part of ASACC and Live DMA in 2017.

Attachment 4C: Overview KULTURA LIVE Venues

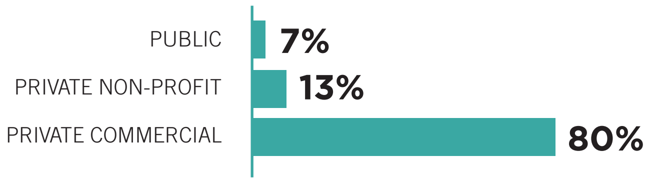
Kultura Live represents **15 music venues** in Basque Country. The venues have a median of **648** audience capacity, but some of them hold less than 150 people. Together the venues present **2,300 artist performances** per year, which attract well over **400.000 visits**. Also **50%** of the music venues organise festivals.

The Basque venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

DIVERSITY OF FUNCTIONS

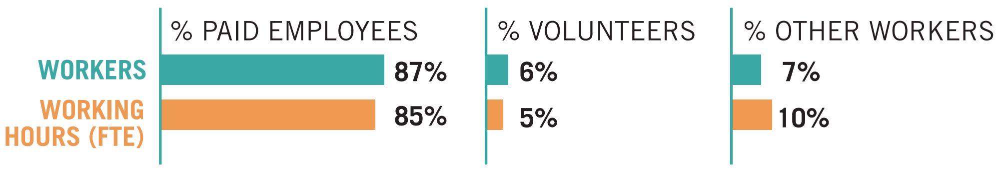


LEGAL STATUS



Kultura Live music venues are for **80%** private commercial venues, but two venues are private non-profit and the one venue in the French part of Basque Country has a public legal status. The business model of these venues is different, but together they generate an income well over **7 million euro**.

Share of Paid and Volunteers Work(ers)



The share of volunteers is very low in the Basque music venues (**6%** of the total workforce). Of the **280** total workers in Kultura Live venues, **240** are paid workers. In total **34%** of the workers are female.

To learn more about these venues visit **http://kulturalive.com/** and/or contact Kultura Live Survey coordinator Arkaitz Villar **info@kulturalive.com**

Based on the data (year 2017) of 6 Kultura Live music venues, collected during 2018/2019, and extrapolated to data of 15 music venues part of Kultura Live and Live DMA in 2017.

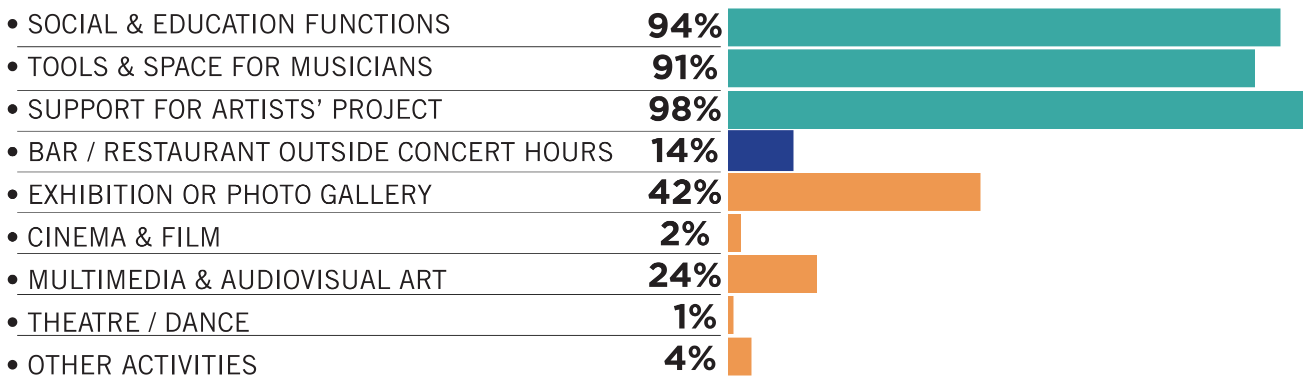
Attachment 4D: Overview FEDELIMA Venues

FEDELIMA

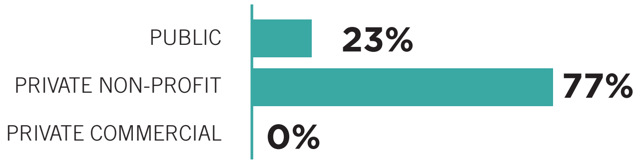
FEDELIMA represents **142 music venues** in France. The venues have a median of **500** audience capacity. Together the venues present more than **17,300 artist performances** per year, which attract over **2.3 million visits**. Also **48%** of the music venues organise festivals.

The French venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

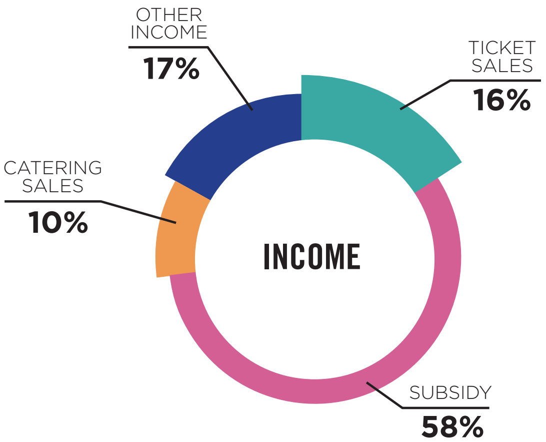
DIVERSITY OF FUNCTIONS

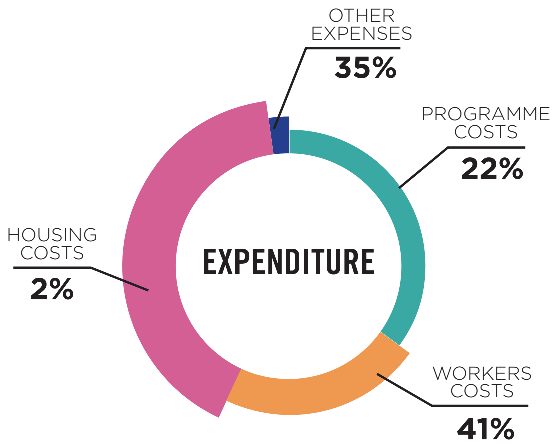


LEGAL STATUS

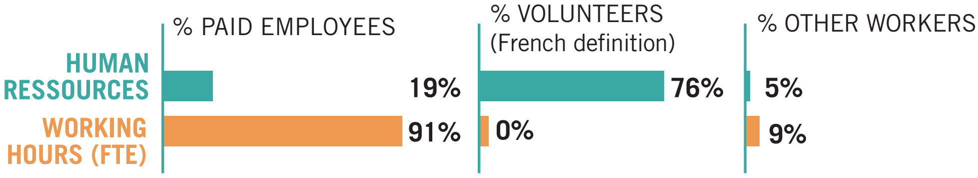


FEDELIMA music venues are for **77%** private non-profit venues and **23%** public venues, which have different functions and business models. They generate a total income of well over **147 million euro**. A large part of the income consists of subsidy **(58%)**, which is related to the relatively high amount of public venues, paid work and social and educational functions. Comparing to other European regions a smaller part of the income is generated by the audience **(26%)**.





Share of Paid and Volunteers Work(ers)



In France, because of a different legislation, volunteers cannot receive any compensation or take a task or a job that can be done by an employee. Therefore they are not counted as workers and expressed in working hours and FTE in our Survey results. The French volunteers however, are included in the total human resources in the Survey, to show their high involvement in the FEDELIMA venues. In total the venues have over **8,600** human resources, of which **1,600** paid workers and well over **6,500** volunteers. In total **37%** of the workers are female.

Much more information and data per type of venue can be found in the latest FEDELIMA Survey report on their website: **www.fedelima.org/article170.html** and/or contact FEDELIMA Survey coordinator Hyacinthe Chataigné, **hyacinthe.chataigne@fedelima.org** for more information.

Based on the data (year 2017) of 106 FEDELIMA music venues, collected during 2018, and extrapolated to data of 142 music venues part of FEDELIMA and Live DMA in 2017.

Attachment 4E : Overview PETZI Venues

Petzi
www.petzi.ch

PETZI represents **113 music venues** in Switzerland. The venues have a median of **300** audience capacity so are generally small. Together the venues present well over **16,400 artist performances** per year, which attract almost **2.2 million visits.** Also **57%** of the music venues organise festivals.

The Swiss venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as :

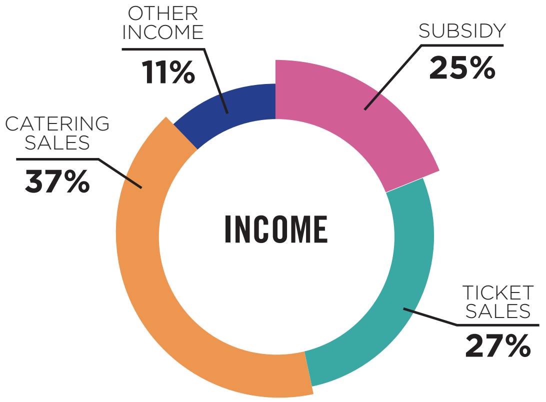
DIVERSITY OF FUNCTIONS

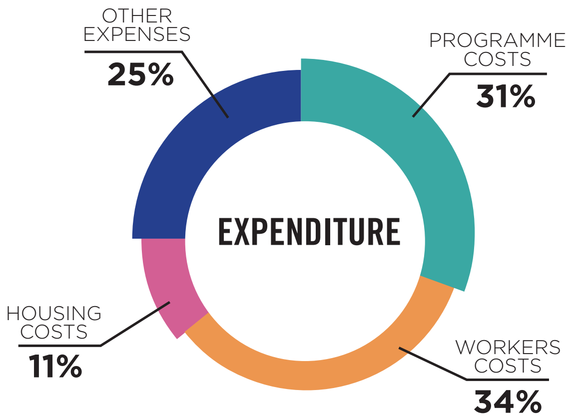
• SOCIAL & EDUCATION FUNCTIONS	28%
• TOOLS & SPACE FOR MUSICIANS	26%
• SUPPORT FOR ARTISTS' PROJECT	29%
• BAR / RESTAURANT OUTSIDE CONCERT HOURS	31%
• EXHIBITION OR PHOTO GALLERY	15%
• CINEMA & FILM	19%
• MULTIMEDIA & AUDIOVISUAL ART	12%
• THEATRE / DANCE	23%
• OTHER ACTIVITIES	15%

LEGAL STATUS

PUBLIC	6%
PRIVATE NON-PROFIT	94%
PRIVATE COMMERCIAL	0%

PETZI music venues are for **100%** non-profit venues, of which **94%** private and **6%** public. They generate a total income of **85 million euro**. The income is a mix of subsidy **(25%)** and audience spendings **(64%)** on tickets, food and beverages. Support from the government and the high amount of volunteers work keeps the exploitation costs lower. Therefore all money that is generated by ticket sales can be spent on direct programme costs and invested in presenting local and emerging talents.





Share of Paid and Volunteers Work(ers)

	% PAID EMPLOYEES	% VOLUNTEERS	% OTHER WORKERS
WORKERS	35%	63%	2%
WORKING HOURS (FTE)	40%	55%	5%

In Switzerland volunteers are very important for the daily practices in the venue, especially for smaller and private non-profit venues. Of the **8,800** total workers in PETZI venues, over **5,500** are volunteers, responsible for **55%** of all working hours.

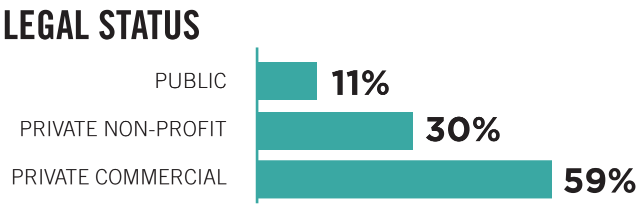
To learn more about these venues visit **https://www.petzi.ch/fr/** and/or contact PETZI Survey coordinator Yves Mermoud, **yves.mermoud@petzi.ch**

Based on the data (year 2016) of 80 PETZI music venues, collected during 2017, and extrapolated to data of 113 music venues part of PETZI and Live DMA in 2017.

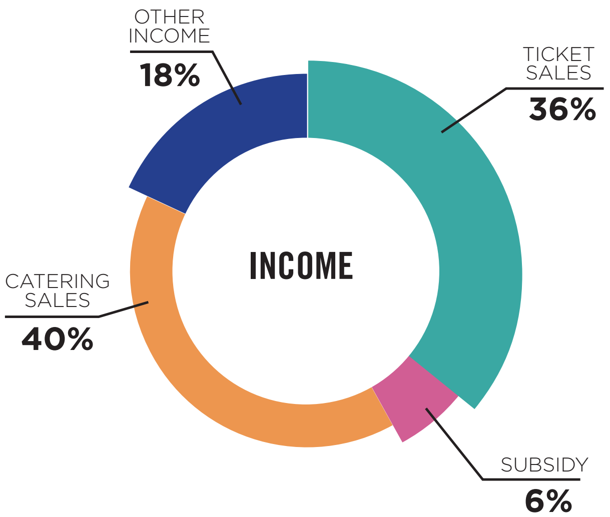
Attachment 4F : Overview LIVEKOMM Venues

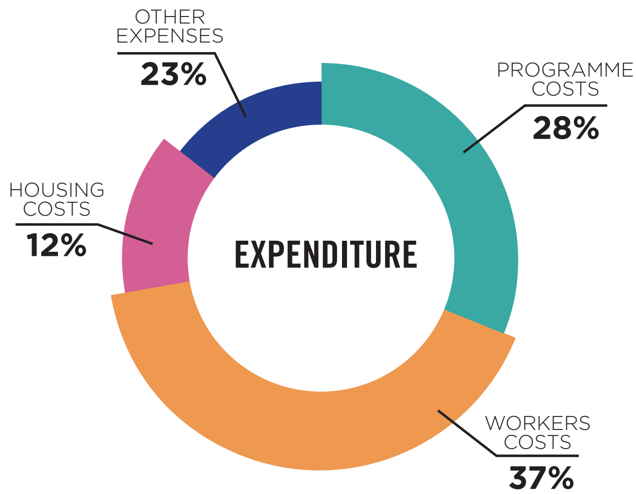
LIVEKOMM
LiveMusikKommission
Verband der Musikspielstätten
in Deutschland e.V.

LiveKomm represents **510 music venues** in Germany, organised in different regions. Until now there is limited information available from their Survey data 2016, but this brings us already some useful information about the main characteristics and business model of the German live music venues and clubs. The LiveKomm venues have a median of **300** audience capacity so are generally small. Together the venues present well over **160,000 artist performances** per year, which attract over **14.6 million visits.**



LiveKomm members are a mix of private commercial venues (**59%**), private non-profit (**30%**) and public venues (**11%**). Therefore they have different business models, but also the non-profit venues have comparing to other European regions a low share of subsidy (**6%)** and venues rely mostly on ticket and catering sales to the audience (**76%**). Venues have in average less money to cover artistic costs than the income generated by ticket sales.





At the moment LiveKomm is cooperating with the German funding and export office for musicians and music companies Initiative Musik in a nationwide Survey project in Germany, including the collection of data of LiveKomm music venues, of which the results are expected in the fall of 2020.

The Berlin Clubcommision, representing 251 clubs, venues & promoters in Berlin, released a report with facts & figures in spring 2019, measuring the social and economical impact of the Berlin clubs, which can be dowloaded right here: **https://www.clubcommission.de/club-culture-study**.

To learn more about LiveKomm venues visit **https://www.livekomm.org/** and/or contact LiveKomm Survey coordinator Christian Ordon, **christian.ordon@liveKomm.org**

Based on the data (year 2016) of 46 LiveKomm music venues, collected during 2017 and 2018, and extrapolated to data of the 510 music venues part of LiveKomm and Live DMA in 2017.

Attachment 4G: Overview COURT-CIRCUIT Venues

Court-Circuit represents **36 music venues** in the French speaking part of Belgium, Wallonia and Brussels. The venues have a median of **400** audience capacity. Together the venues present almost **7,000 artist performances** per year, which attract over **550.000 visits**. Also **89%** of the music venues organise festivals.

The Court-Circuit venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

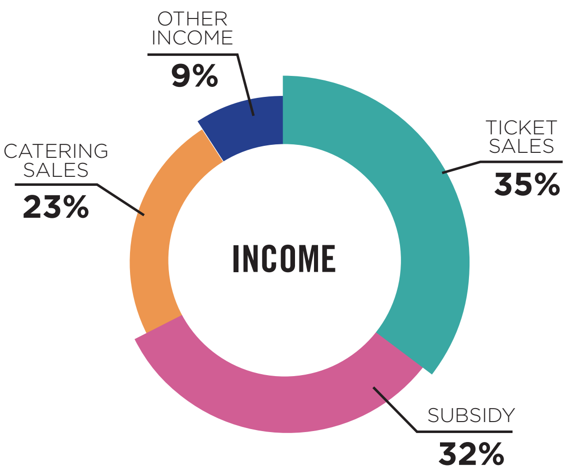
DIVERSITY OF FUNCTIONS

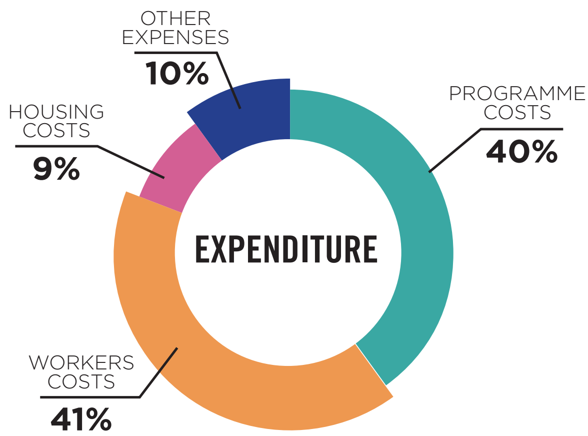
• SOCIAL & EDUCATION FUNCTIONS	44%
• TOOLS & SPACE FOR MUSICIANS	67%
• SUPPORT FOR ARTISTS' PROJECT	67%
• BAR / RESTAURANT OUTSIDE CONCERT HOURS	22%
• EXHIBITION OR PHOTO GALLERY	22%
• CINEMA & FILM	22%
• MULTIMEDIA & AUDIOVISUAL ART	33%
• THEATRE / DANCE	22%
• OTHER ACTIVITIES	67%

LEGAL STATUS

PUBLIC	0%
PRIVATE NON-PROFIT	100%
PRIVATE COMMERCIAL	0%

Court-Circuit music venues are for **100%** private non-profit venues, They generate a total income of **13.5** million euro. The income is a mix of subsidy (**32%**) and audience spendings (**58%**) on tickets, food and beverages. Support from the government and the high amount of volunteers work make housing and workers costs lower, so more money is spent on direct programme costs than is generated by ticket sales, and more can be invested in presenting local and emerging talents.





Share of Paid and Volunteers Work(ers)

	% PAID EMPLOYEES	% VOLUNTEERS	% OTHER WORKERS
WORKERS	19%	67%	14%
WORKING HOURS (FTE)	42%	39%	19%

In Belgium volunteers are very important for the daily practices in the venue, especially for smaller venues. Of the **1,200** total workers in Court-Circuit venues, almost **800** are volunteers, responsible for **39%** of all working hours. In total **21%** of the workers are female.

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

Based on the data (year 2017) of 9 Court-Circuit music venues, collected during 2018, and extrapolated to data of 36 music venues part of Court-Circuit and Live DMA in 2017.

Attachment 4H : Overview CLUBCIRCUIT Venues

Clubcircuit represents **15 music venues** in Flanders, the Dutch speaking part of Belgium. The venues have a median of **600** audience capacity. Together the venues present almost **3,000 artist performances** per year, which attract almost **550.000 visits**. Also **85%** of the music venues organise festivals.

The Clubcircuit venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

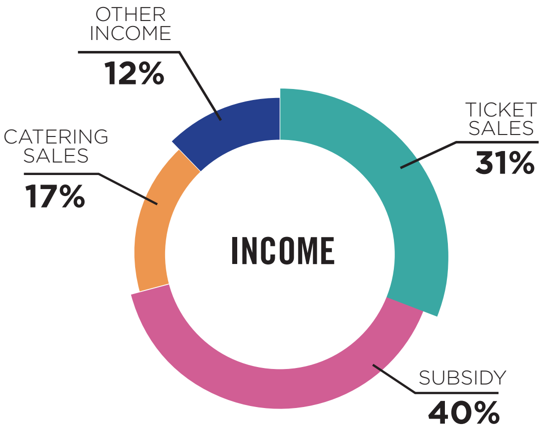
DIVERSITY OF FUNCTIONS

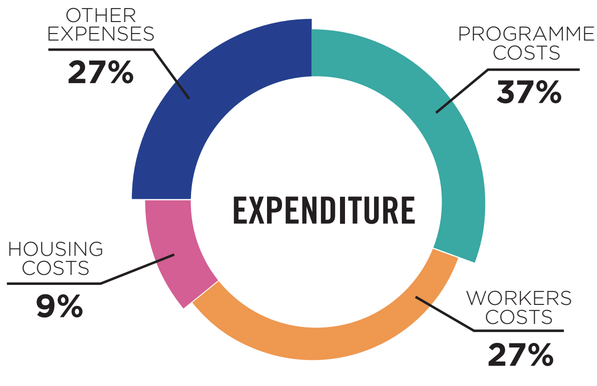
• SOCIAL & EDUCATION FUNCTIONS	62%
• TOOLS & SPACE FOR MUSICIANS	46%
• SUPPORT FOR ARTISTS' PROJECT	77%
• BAR / RESTAURANT OUTSIDE CONCERT HOURS	77%
• EXHIBITION OR PHOTO GALLERY	31%
• CINEMA & FILM	8%
• MULTIMEDIA & AUDIOVISUAL ART	8%
• THEATRE / DANCE	0%
• OTHER ACTIVITIES	92%

LEGAL STATUS

PUBLIC	0%
PRIVATE NON-PROFIT	100%
PRIVATE COMMERCIAL	0%

Clubcircuit music venues are for **100%** private non-profit venues, They generate a total income of **21 million euro**. The income is a mix of subsidy (**40%**) and audience spendings (**48%**) on tickets, food and beverages. Support from the government and the high amount of volunteers work make housing and workers costs lower, so more money is spent on direct programme costs than is generated by ticket sales, and more can be invested in presenting local and emerging talents.





Share of Paid and Volunteers Work(ers)

	% PAID EMPLOYEES	% VOLUNTEERS	% OTHER WORKERS
WORKERS	3%	96%	1%
WORKING HOURS (FTE)	55%	36%	9%

In Belgium volunteers are very important for the daily practices in the venue, especially for smaller venues. Of the **4,200** total workers in Clubcircuit venues, over **4,000** are volunteers, responsible for **36%** of all working hours. In total **29%** of the workers are female.

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

Based on the data (year 2017) of 13 Clubcircuit music venues, collected during 2018, and extrapolated to data of 15 music venues part of Clubcircuit and Live DMA in 2017.

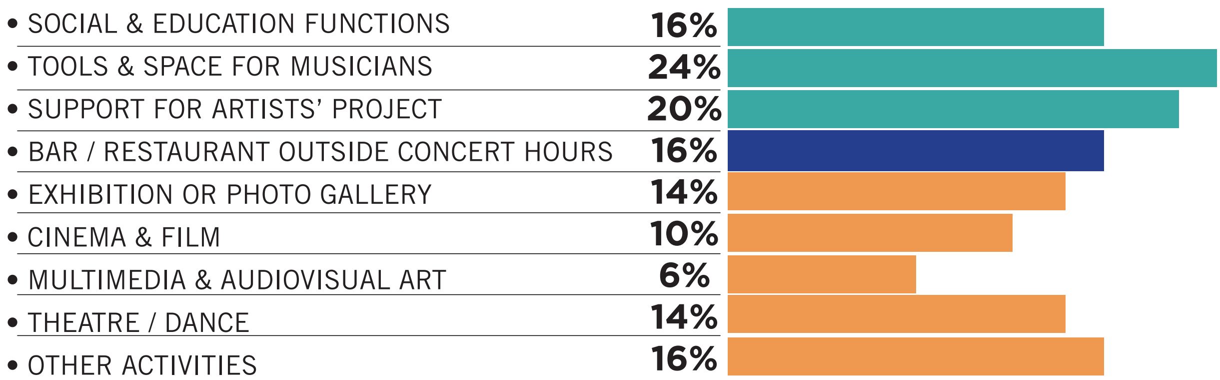
Attachment 4I: Overview VNPF Venues

vereniging nederlandse pop|podia en festivals

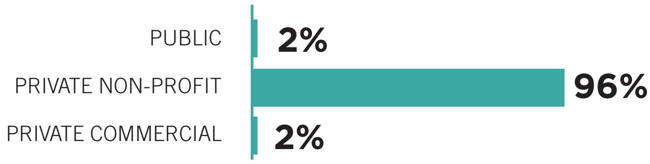
The Dutch Association of Music Venues and Festivals, **VNPF** represents **58 music venues** in the Netherlands. The venues have a median of **600** audience capacity. Together the venues present well over **26,000 artist performances** per year, which attract over **4.1 million visits**. Also **49%** of the music venues organise festivals.

The VNPF venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

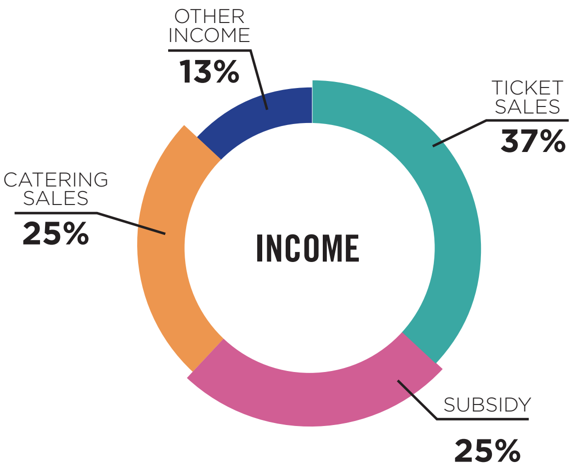
DIVERSITY OF FUNCTIONS

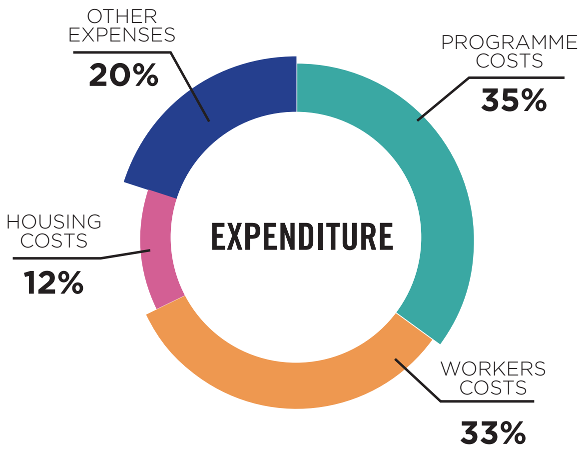


LEGAL STATUS

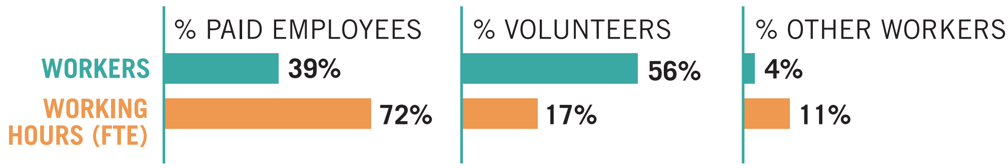


VNPF music venues are for **98%** private non-profit venues, They generate a total income of **167 million euro.** The income is a mix of subsidy (**25%**) and audience spendings (**62%**) on tickets, food and beverages. Support from the government and the high amount of volunteers work make housing and workers costs lower, so most money that is generated by ticket sales is spent on direct programme costs, and more can be invested in presenting local and emerging talents.





Share of Paid and Volunteers Work(ers)



In the Netherlands volunteers are very important for the daily practices in the venue, especially for smaller venues. Of the **8,200** total workers in the VNPF venues, over **4,600** are volunteers, responsible for **17%** of all working hours. In total **43%** of the workers are female.

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

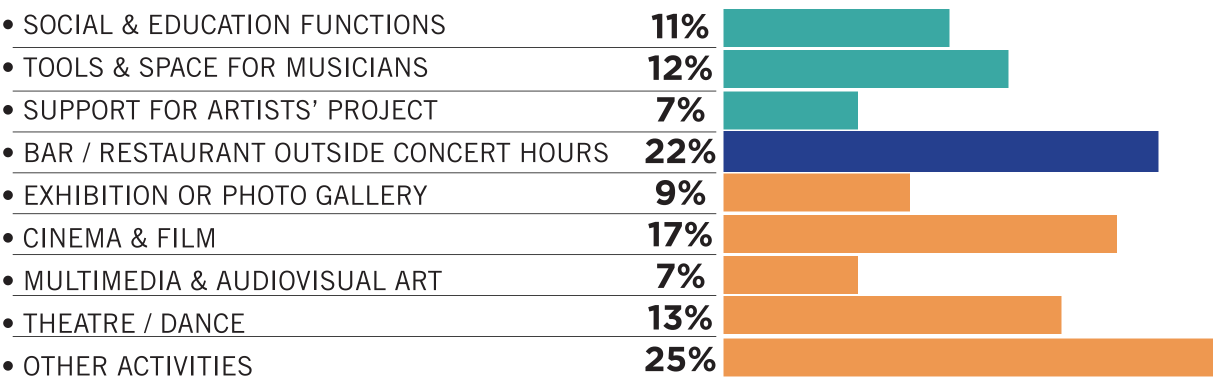
Based on the data (year 2017) of 51 VNPF music venues, collected during 2018, and extrapolated to data of 58 music venues part of VNPF and Live DMA in 2017.

Attachment 4J : Overview MUSIC VENUE TRUST Venues

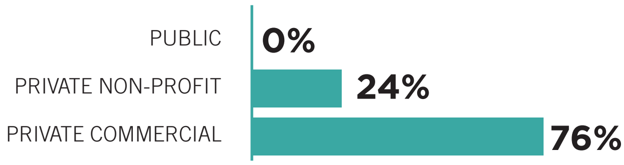
Music Venue Trust represents **460 music venues** in the United Kingdom. The venues have a median of **250** audience capacity, so are generally small. Together the venues present well over **350,000 artist performances** per year, which attract over **12.5 million visits**. Also **18%** of the music venues organise festivals.

Music Venue Trust venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

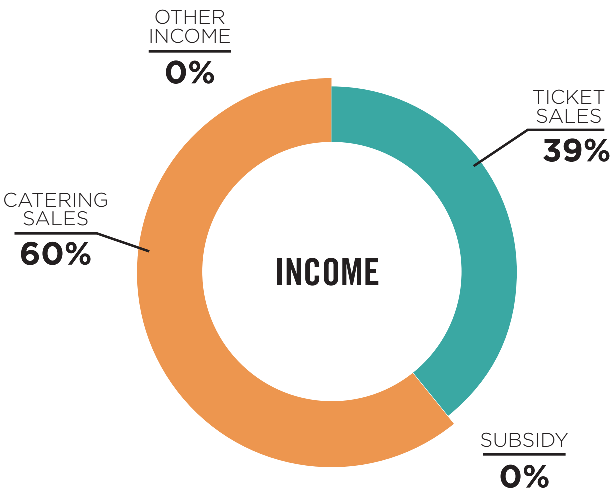
DIVERSITY OF FUNCTIONS

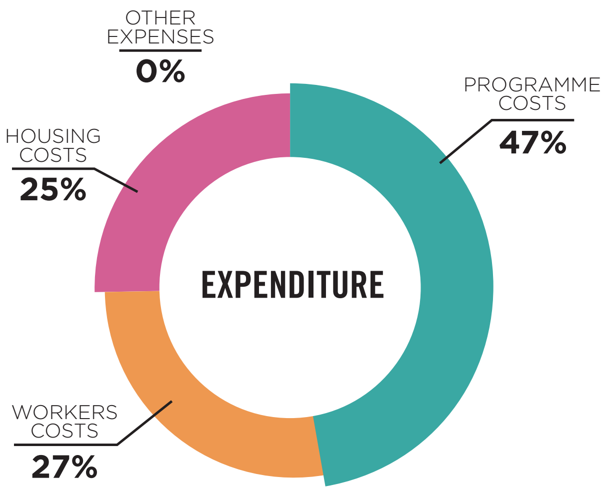


LEGAL STATUS



Music Venue Trust venues are for **76%** private commercial venues, and **24%** private non-profit venues, Therefore they have different business models, but comparing to other European regions, in the UK also the non-profit venues have hardly any financial support (subsidies) from the governments and venues rely almost completely on audience spendings (tickets and catering sales).





To learn more about these venues visit **musicvenuetrust.com**
and/or contact Music Venue Trust Survey coordinator Simon Bray, **simon.bray@musicvenuetrust.com**

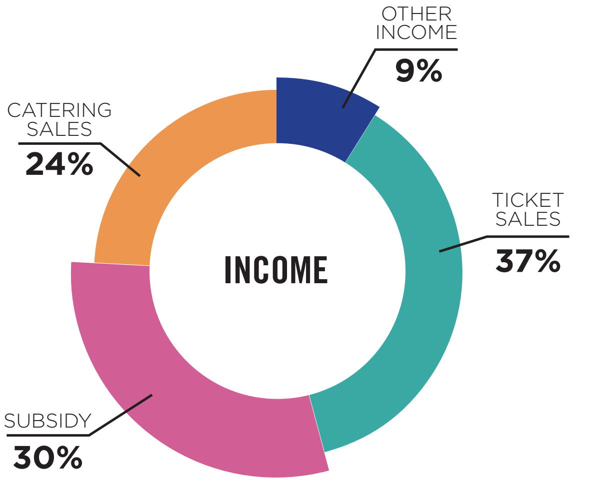
Based on the data (year 2017) of 89 Music Venue Trust music venues, collected during 2018 and 2019, and extrapolated to data of 460 music venues part of Music Venue Trust and Live DMA in 2017.

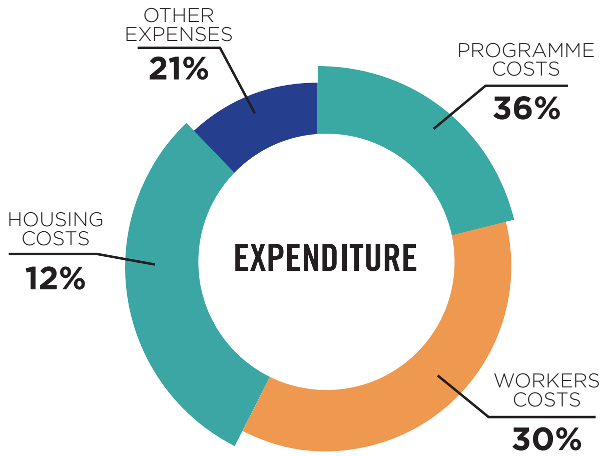
Attachment 4K : Overview DANSK LIVE Venues

DANSK
LIVE

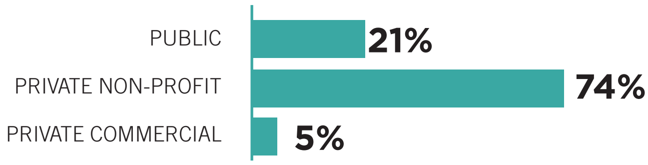
Dansk Live represents **76 music venues** in Denmark. The venues have a median of **500** audience capacity. Together the venues present well over **16,000 artist performances** per year, which attract almost **1.7 million visits.**

Dansk Live venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities. Also **70%** of the music venues organise festivals.



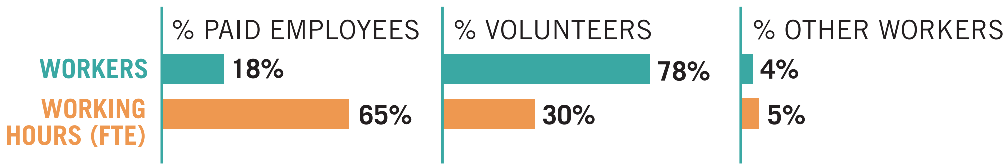


LEGAL STATUS



Dansk Live music venues are for **95%** non-profit venues, mostly private non-prodit (**74%**) but also public venues (**21%**). Also **5%** of all venues are private commercial. Music venues with different legal status have different business models, but looking at all Dansk Live venues, the Survey results show a mixed income of subsidy (**36%**) and audience spendings (**48%**) on tickets, food and beverages. In total Dansk Live venues generate an income of well over **30 million euro**. Support from the government and the high amount of volunteers work make housing and workers costs lower, so almost all money generated by ticket sales is spent on programme costs, and more can be invested in presenting local and emerging talents.

Share of Paid and Volunteers Work(ers)



In Denmark volunteers are very important for the daily practices in the venue, especially for smaller venues. Of the **5,100** total workers in the Dansk Live venues, over **4,000** are volunteers, responsible for **30%** of all working hours. In total **49%** of the workers are female.

To learn more about these venues visit **http://dansklive.dk** and/or contact Dansk Live Survey coordinator Michael Folmer Wessman, **michael@dansklive.dk**

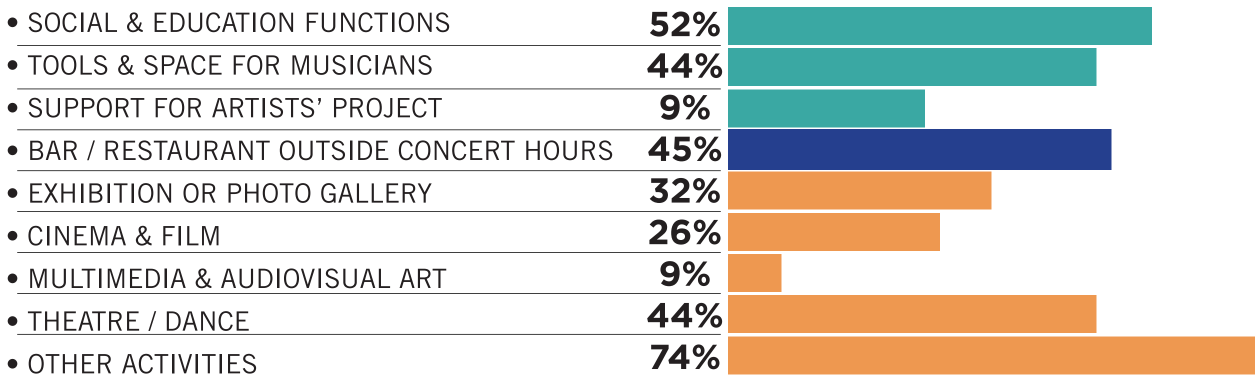
Based on the data (year 2017) of 43 Dansk Live music venues, collected during 2018 and 2019, and extrapolated to data of 76 music venues part of Dansk Live and Live DMA in 2017.

Attachment 4L : Overview NKA Venues

The Norske Konsertarrangører, **NKA** represents **165 music venues** in Norway. The venues have a median of **350** audience capacity, so are generally small. Together the venues present well over **19,000 artist performances** per year, which attract almost **2.8 million visits**. Also **5%** of the music venues organise festivals.

The Norwegian venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as :

DIVERSITY OF FUNCTIONS



LEGAL STATUS

NKA music venues are a mix of **21%** public venues, **47%** private non-profit venues, and **32%** public venues and therefore have different business models. The current Survey response and results don't give enough information yet, to publish more detailed numbers about their workers, income and expenses, but we can see that for many Norwegian venues the support from the government and the high amount of volunteers work keeps the exploitation costs lower, and this way more money can be invested in presenting local and emerging talents.

To learn more about these venues visit **www.konsertarrangor.no**
and/or contact NKA Survey coordinator Andreas Feen Sørensen, **andreas@konsertarrangor.no**

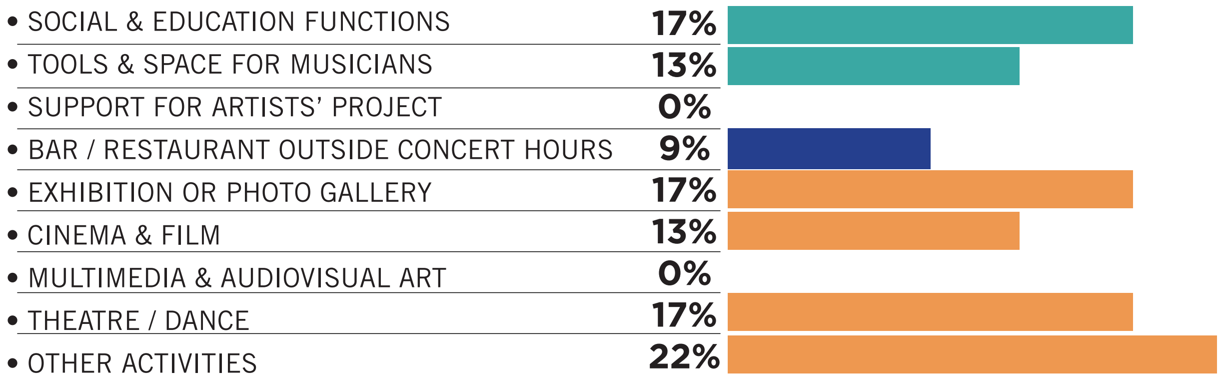
Based on the data (year 2017) of 66 NKA music venues, collected during 2018 and 2019, and extrapolated to data of 165 music venues part of NKA and Live DMA in 2017.

Attachment 4M : Overview SVENSK LIVE Venues

Svensk Live represents **150 music venues** in Sweden. The venues have a median of **600** audience capacity. Together the venues present well over **11,000 artist performances** per year, which attract almost **1.5 million visits**. Also **70%** of the music venues organise festivals.

The Svensk Live venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as:

DIVERSITY OF FUNCTIONS



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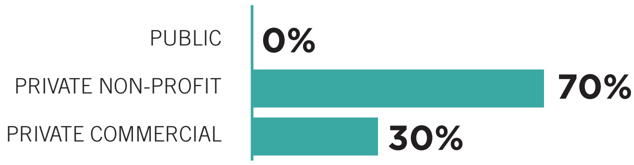
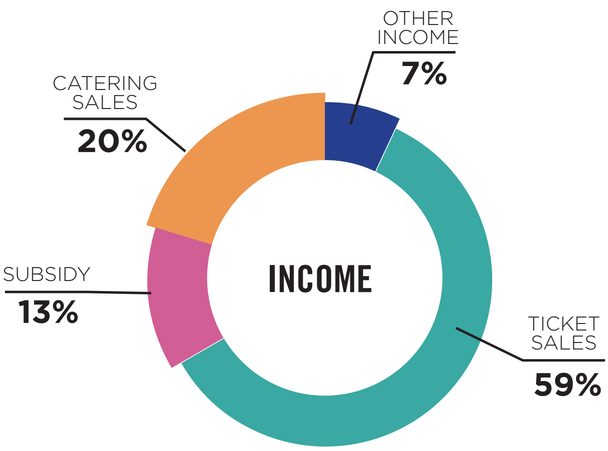
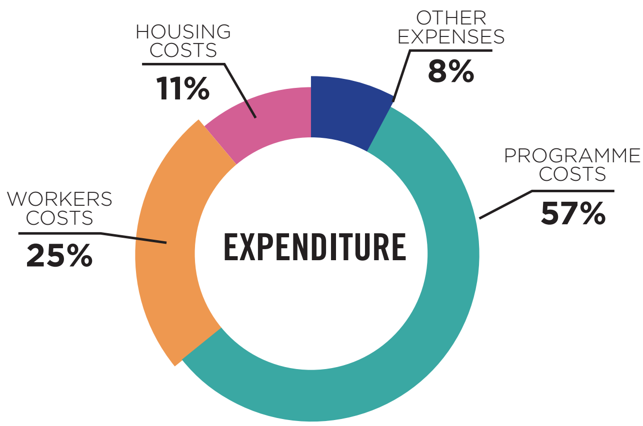
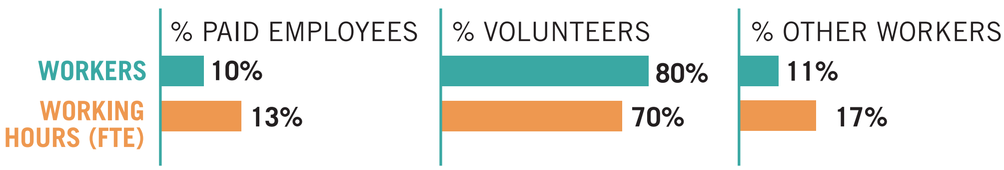


Svensk Live music venues are a mix of **70%** private non-profit venues, and **30%** private commercial venues. Music venues with different legal status have different business models, but looking at all Svensk Live venues the Survey results show a mixed income of subsidy (**13%**) and audience spendings (**79%**) on tickets, food and beverages. In total, the Svensk Live venues generate an income of well over **18 million euro**. The money is mostly spent to cover the costs of the music programme, workers and accommodations. Comparing to other European regions in Sweden the financial support from the government for non-profit venues is relatively low.





Share of Paid and Volunteers Work(ers)



In Sweden volunteers are very important for the daily practices in the venue, especially for smaller venues. Of the **1,300** total workers in the Svensk Live venues, over **1,050** are volunteers, responsible for **70%** of all working hours. In total **55%** of the workers are female.

To learn more about these venues visit **www.svensklive.se** and/or contact Svensk Live Survey coordinator Måns Katsler, **mans@svensklive.se**

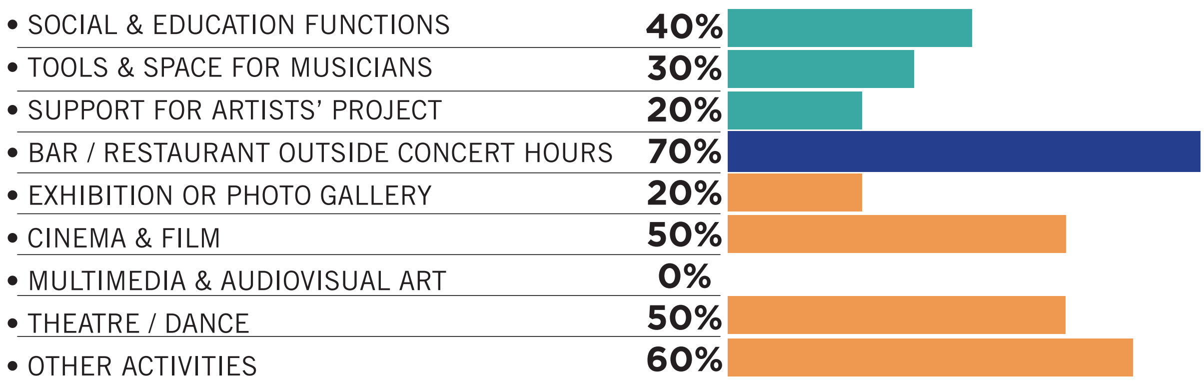
Based on the data (year 2017) of 23 Svensk Live music venues, collected during 2018 and 2019, and extrapolated to data of 150 music venues part of Svensk Live and Live DMA in 2017.

Attachment 4N : Overview LIVEFIN Venues

LiveFIN represents **24 music venues** in Finland. Together the venues present well over **16,000 artist performances** per year, which attract over **2.3 million visits**. Also **40%** of the music venues organise festivals.

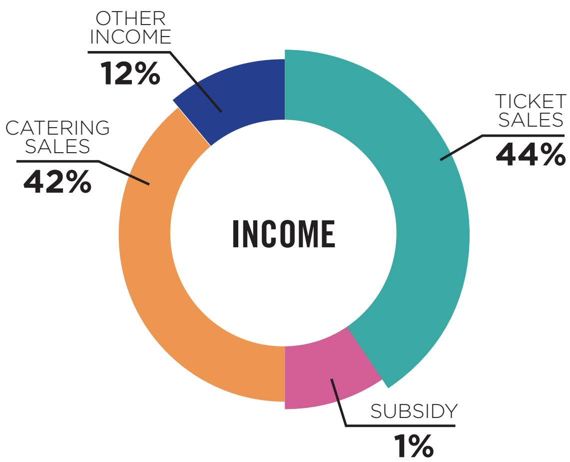
The LiveFIN venues do much more than live music alone, and are also involved in educational, social, artistic, culinary, and multi-disciplinary activities, such as

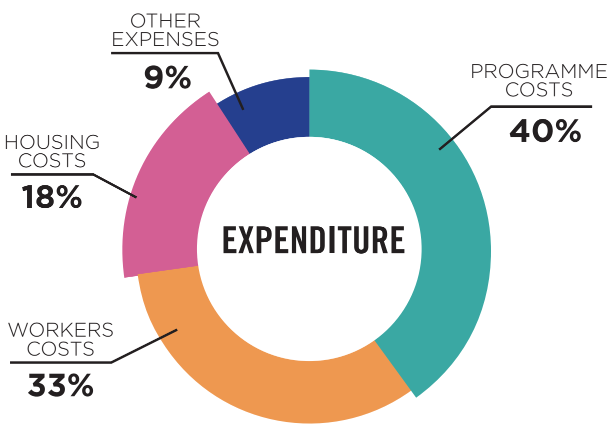
DIVERSITY OF FUNCTIONS



LEGAL STATUS

LiveFIN music venues are a mix of **20%** public non-profit venues, **30%** private non-profit venues, and **50%** private commercial venues. Music venues with different legal status have different business models, but looking at all LiveFIN venues, we notice a very low share of government support (**1%** subsidy) also for the non-profit venues, comparing to other European regions. LiveFIN venues rely heavily on audience spendings (**86%**) on tickets, food and beverages. In total, the LiveFIN venues generate an income of well over **30 million euro**. The money is mostly spent to cover the costs of the music programme (**40%**), workers (**33%**) and accommodation (**18%**).





In Finland volunteers are very important for the daily practices in the venue, especially for smaller venues. Of the **1,600** total workers in the LiveFIN venues, almost **900** are volunteers. In total **40%** of all workers are female.

To learn more about these venues visit **www.livefin.fi** and/or contact LiveFIN Survey coordinator Salla Vallius, **salla@livefin.fi**

Based on the data (year 2017) of 10 LiveFIN music venues, collected during 2018 and 2019, and extrapolated to data of 24 music venues part of LiveFIN and Live DMA in 2017.