

LIVE MUSIC CHALLENGES IN EUROPEAN CITIES

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Changes in audience behavior and increased unpredictability that weaken small and medium-sized concert venues.

Although the root cause of the issue has not necessarily been identified, **all respondents seem to agree on observing changes in audience behavior**, particularly among younger generations. These changes include being less predictable in their ticket purchasing habits, less interested in regular club nights, spending less at the bar, and showing less motivation to work night shifts when it comes to recruitment.

Respondent from Estonia, Tallinn - 450-capacity venue



Regarding the bar and food and beverage side, there's a challenge because many people don't want to work nights anymore. So, it's quite difficult to find quality staff who can do the job. (...) And the other problem with the production department is that we are heavily understaffed due to budget issues. Basically, people are burning out quickly because they have to handle a packed schedule, such as preparing for a concert on Friday morning, soundcheck, the concert itself, and then a party afterward. This often results in a 24-hour shift, followed by a few hours of sleep, only to repeat a similar schedule on Saturday.

Respondents frequently highlight that events offering high production value, thematic elements, and engaging visuals have become pivotal in attracting attendees. This reflects a shift in consumer behavior where **people prioritize memorable, impactful events over traditional formats**.

Respondent from Finland, Tampere - 200-capacity venue



The reason people tend to prefer nightclubs, karaoke bars, and large clubs over small live music venues is, in my opinion, their desire for more extravagant and larger-than-life experiences. While major festivals and concerts are consistently sold out, the scene for indie and underground bands is shrinking. The number of people interested in smaller, emerging bands continues to decline, as the current consumer trend leans toward larger, more flamboyant, and stadium-like experiences. Audiences are willing to pay high prices for massive, big-budget concerts, but attending performances by up-and-coming or lesser-known bands has lost its appeal for many.

The decline in concert and club nights attendance could easily be attributed to factors such as the financial precarity of younger generations in an inflationary context or the psychological impacts of social media, the Covid lockdowns, or a growing appetite for grandiose experiences. However, much like the issue of noise complaints, it is worth stepping back to analyze this phenomenon from a broader, collective perspective rather than relying solely on these immediate explanations.

If we look at **ticket sales across the entire industry, revenues have never been higher**. However, they are increasingly concentrated on large-scale events. Beyond the behavior of audiences alone, this trend was highlighted in a report published by the European Commission in 2019 under the term «**eventisation**», defined as the increased focus on staging and on experiences surrounding the content played at an event (concerts but also sport competitions and other similar events), such as the aspect of temporality, the special equipment, and the atmosphere of the physical place:¹

The live industry is experiencing a growing trend of “eventisation”. This tendency is particularly impactful considering the growing number of festivals at European level. Music is not the sole reason which leads consumers to attend an event. Music becomes part of a global experience. Large music venues are also subjected to this change. For example, the managing director of the Ancienne Belgique (AB) explained that there is a strong tendency of the venue to develop some forms of festival events outside in the summer, and inside in the winter in order to attract new audiences through augmented experiences. This goes hand-in-hand with the growing importance of continuous communication on social media (most interviewees explain they are dealing with updates on social media streams at least every 12 hours).²

This shift has been driven, in part, by **aggressive marketing campaigns from major promoters**, which encourage spectators to focus their spending on blockbuster shows. This consolidation of attention on large events marks a significant change in scale, reducing the visibility and viability of smaller, independent gatherings.

Respondent from France, Lyon - 400-capacity venue



I believe it is important to emphasize that the spectator's choice is not necessarily entirely free. Indeed, when we look at festivals—whether large-scale or medium-sized—it is striking to observe how, in the middle of winter, the market becomes inundated with announcements and ticket sales for summer events. These festivals dominate the media landscape, monopolizing attention through massive marketing and communication strategies. This phenomenon is further amplified by the substantial budgets allocated to these campaigns, overshadowing other initiatives. It creates a vicious cycle where enormous sums are invested to generate ever-increasing revenues, fueling a dynamic of escalation that occupies an increasingly dominant position.

Additionally, several respondents underlined noticeable change in how younger generations approach spending, adopting a «**less but better**» **mindset, favoring quality over quantity in consumption**. This applies not only to live events but also to related areas like alcohol consumption, where quality is prioritized over volume. While this shift offers long-term health benefits, it also presents challenges for venues and organizers accustomed to different consumption patterns.

However, one of the major issues is that **audience behavior has become less predictable**. Unlike in the past, when people planned their attendance well in advance, decisions are now more spontaneous. This unpredictability complicates event planning, especially for smaller venues without the resources to book high-profile headliners months ahead. Larger players, with their ability to secure big names and massive productions, gain a competitive edge in this environment.

1. European Commission: Directorate-General for Education, Youth, Sport and Culture, Le Gall, A., Jacquemet, B., Daubeuf, C., Legrand, E. et al., [Analysis of market trends and gaps in funding needs for the music sector](#) – Final report, Publications Office, 2020

2. *ibid*

Respondent from Finland, Oulu - 300-capacity venue



Planning has become extremely difficult compared to the pre-COVID era. Previously, we could draft a budget for the upcoming year with a reasonable degree of certainty. Sales patterns were predictable—we knew exactly what to expect, even for specific days like Fridays. It was almost like clockwork. Now, the situation is entirely different; there's a lack of certainty about anything. While well-known Finnish artists still tend to draw strong sales, the overall nightlife scene has become highly unpredictable, making forward planning much more challenging.

How to adapt to these changes in behavior?

These changes collectively point to an evolving live music landscape. Organizers and venues feel the need to adapt to the new demands for immersive, large-scale, and high-quality experiences while navigating the unpredictability of audience behavior. This phenomenon is further amplified by the generational gap between venue managers (in their forties/fifties) and the target audience (in their twenties). One of the solutions for venues is to **integrate a number of young professionals** into their teams, particularly in key positions such as communication, to better understand this generation and more effectively engage with them.

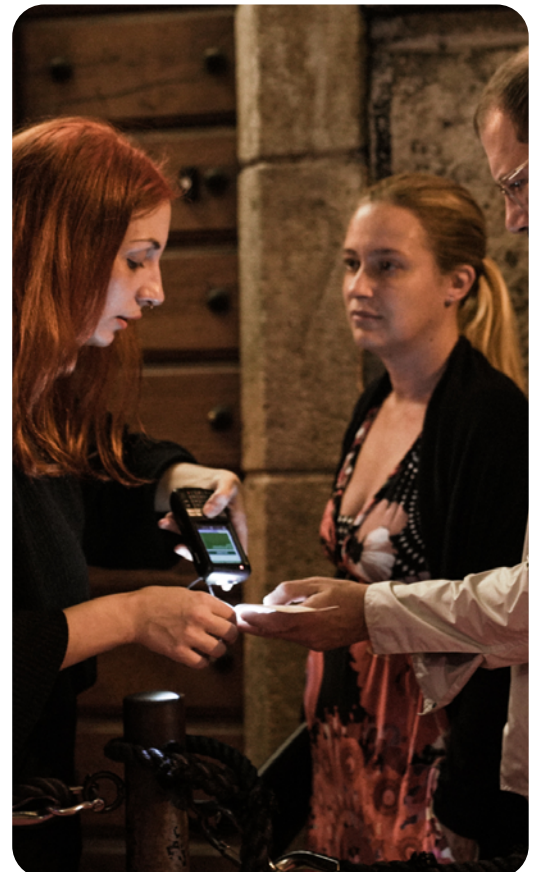
Respondent from Italy, Bologna - 99-capacity venue



Unfortunately every year we get older. As a result, our audience is changing significantly. We aim to adapt to this shift rather than change who we are, while also seeking new collaborators. Specifically, we are working with young professionals in areas like communication or emerging roles within our organization.

The music industry, governed by market rules and a business-oriented approach, offers little room for adaptation by small and medium-sized concert venues. Yet, these spaces play a crucial role within the cultural ecosystem: they are hubs for artistic discovery, training grounds for emerging talents, and vital community and social connectors. Their modest scale, local roots, and operational structures make it impossible for them to compete with an industry that has long embraced entertainment values and gigantism. With audiences becoming increasingly elusive, it is imperative to **rethink the role and format of these venues**.

For younger generations, musical discovery and socialization no longer necessarily occur in physical spaces, as social media has revolutionized these practices. However, digital platforms cannot replace everything concert venues have to offer. Perhaps the traditional nighttime format, the classic concert model, or club culture no longer meets current expectations. These venues may need to be reimagined, not by chasing inflated fees or flashy lineups, but by creating an alternative. An alternative whose importance has yet to be fully understood but could restore concert venues to their status as indispensable cultural hubs of the future.



Credit: Ana Viotti at Musicbox (Lisbon, PT)

In this context, the model of one respondent, 1000Fryd in Aalborg, Denmark, is noteworthy. The venue operates on a **consensus democracy model**, where decisions are made collectively and require unanimous agreement. Every individual, from the lowest in hierarchy to volunteers, has a voice in shaping programming. This democratic approach ensures that no single leader dictates the decisions, fostering a truly inclusive environment. Unlike other venues that may have a centralized authority, this model allows for a unique and participatory experience where anyone can propose events or bands and receive support to make it happen.

Respondent from Denmark, Aalborg - 110-capacity venue



I think if you look at many venues in Denmark, it's often young white men booking bands, and that's fine, but they're probably not going to be able to discover the next big thing or the next cool band because they have no understanding of what's going on with younger generations. I think that's where we excel because we have a constant influx of new people defining what's cool. This makes it organic—there's no risk of it dying out because there are always fresh perspectives coming in, and no one judges others on their music tastes.

Especially, this approach ensures a programming that closely reflects what is truly new and relevant, as it is shaped organically by diverse voices, ensuring that the next big band or trend is discovered naturally by those closest to the community.

However, finding a different model without succumbing to 'eventisation' requires experimentation and risk-taking. The major challenge for small and medium-sized concert venues navigating this multifaceted crisis is that it directly impacts their freedom and ability to adapt.

FULL STUDY

MAP OF CHALLENGES