

# LIVE MUSIC CHALLENGES IN EUROPEAN CITIES

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An increasingly difficult economic balance that directly impacts adventurous programming.

The current model reveals its limits, with **opportunities for artistic emergence, bold programming, and independence steadily diminishing**. This reality is reflected in the interviews we conducted: a reduction in the total number of events, fewer in-house organized dates, and a decline in the diversity of artistic styles represented in programs. In the long run, **this trend threatens the very essence of small and medium-sized venues**:

Respondent from Germany, Berlin - 250-capacity venue



*We have been struggling a lot because, even though we are booking good local bands, most people are not attending. This year, we are actually experiencing some of the lowest numbers for our own promotions. It's been a while since we had a sold-out event from our own programming. This is something we've been discussing for some time now: how can we reach the new generation and encourage them to come to the venue and understand why we do this? The main challenge is the constant risk of not breaking even.*

Respondent from Bulgaria, Sofia - 800 and 150-capacity venue



*One of our challenges is that we want to host more emerging artists, but due to insufficient support, funding, and programs, this becomes very difficult for us. Just unlocking the doors to the venue costs €1,000, so we need some form of support if we are to present more emerging talent.*

The combined impact of rising costs and declining revenues has significantly disrupted the economic balance of concert venues, **affecting their ability to invest in the future**. This strain is intensified by the **ongoing reduction in public funding**. While some venues report strong attendance and ticket sales, these successes often mask a deeper issue: the escalating costs of programming, artist fees, and overall event production.

This situation disproportionately impacts smaller venues, particularly those focused on nurturing emerging talent and maintaining diverse programming. The capacity to take risks on lesser-known or experimental artists—a cornerstone of cultural innovation—is increasingly compromised. These challenges, set against the backdrop of broader political shifts across Europe, threaten the sustainability of a vital sector and the creative risks essential for cultural growth.



Credit: Kultuuriklubi Tempel (Parnu, EE)



*Some of our venues today report excellent attendance figures and remarkable ticket sales, which is undeniably positive. However, a closer examination reveals a more nuanced reality. The costs associated with organizing a concert – including programming and artist fees – are continuously rising. While certain venues are thriving, others are facing significant challenges, particularly those on the front lines of the sector's struggles. Nonetheless, a common issue shared by all these venues, whether successful or struggling, lies in the increasing difficulty of programming emerging artists.*

*This challenge is further compounded by the intense pressure of competition, which restricts programming opportunities. For me, this represents one of the most critical points of concern: what is the current capacity of venues to program independently and to continue taking risks by supporting young talent? This issue, in my view, lies at the heart of the problem. It is a concern that affects all venues, whether public, private, non-profit, or commercial.*

If the live music sector is expected to be entirely profitable, there is little room for emergence and risk-taking. However, if no one takes these risks, profitable profiles may at best emerge through social networks but lack the stage experience and training needed, impacting the quality of performances and the sector as a whole. Simply put, failing to support the capacity to program emerging acts and take risks is akin to cutting the branch on which even the most profitable are seated.

### What are the prospects for the future?

Public funding, when it exists and supports a policy of promoting culture, diversity, and emerging talent, serves as a key lever for supporting concert venue programming in many countries. However, in several cases, political shifts (national, regional, and/or local level) have led to a reduction in public resources. To enhance its support for promoting European culture and diversity, the European level could be an effective avenue to sustain these spaces dedicated to the development and dissemination of emerging musical artists. Initiatives like Liveurope demonstrate how, when structured effectively, **funding can be redistributed efficiently** and contribute meaningfully to supporting European emergence and its circulation.



*"For me, the solution lies in how public funding can support programming efforts. That's exactly what we're doing with Liveurope: finding ways to support highly diverse venues across territories while preserving their programming independence. At the start, we had an annual grant of €500,000, which was later increased by 40% to €700,000 per year. This increase let us add 40% more members to our platform, helping more venues get the funding they need to boost the European aspect of their programmes. Over 10 years, we've received €5.6 million from the EU, supporting 5,000 concerts featuring emerging European artists. For what it achieves, Liveurope is very cost-effective. If we could scale it up to support not just 24 venues, but perhaps 100, the systemic impact would be significant. It would enable us to amplify the autonomy of programming in a truly ambitious way, creating concrete and effective change."*

Liveurope is a platform that **facilitates access to European funds** for certain venues and organizations. For individual structures attempting to secure this funding as project leaders, the process is often challenging—not only due to the complexity of the application process but also because of the demanding administrative management required to oversee such projects.

Independent stakeholders may feel that the activities they are already carrying out deserve support in a hostile economic and political context. The requirement to operate within a project framework can be a hindrance, as it is burdensome to manage and sometimes even counterproductive, potentially exhausting teams that are already vulnerable:

#### Respondent from Estonia, Tallinn - 300-capacity venue

“Of course, what we receive from Europe is the Liveurope fund, and it’s great. It helps us a lot to organize many different concerts that otherwise wouldn’t have happened. But ideally, I think everyone would appreciate some kind of relief grant or European support for what we’re already doing. We’re already doing a lot, and taking on extra projects isn’t feasible for us. It would be ideal if someone could recognize the work we’re already doing, let us demonstrate its value, and provide financial relief for that. That would be absolutely amazing.”

Another potential avenue lies in the **structuring and redistribution of resources within the live music sector itself**. This solution draws inspiration from the model used in football clubs and leagues, where the teams that trained top players are entitled to a percentage of their future earnings. Such a framework encourages investment in talent development while fostering a sense of fairness and sustainability within the system. This concept is beginning to gain traction, particularly in the UK, where it is being explored as a way to support smaller venues and organizations that play a crucial role in nurturing emerging artists. By redistributing a portion of the financial success of more established acts, the live music ecosystem could create a more equitable system, ensuring that those who contribute to the foundation of artistic careers are not left behind.

#### Court-circuit, network of professional live music venues in Wallonia & Brussels, BE

I think we should perhaps look towards sports. We’ve seen it happening in England as well. In England, Coldplay now donates a portion of their concerts to a fund for smaller venues. In fact, I’m starting to discover the world of football because I’ve never been involved. When a player is transferred from one team to another, the previous team is considered to have invested in them—let’s say an artist, or in this case, a football player. Therefore, the new team is accountable, at least the player owes something to the team that helped them grow. Perhaps it’s a path worth exploring, especially as Coldplay shows that with venues in England, this isn’t a utopian idea. Maybe artists who grow could contribute to a fund to support smaller venues that helped them at the start. This could partially address the speculation around artists.

#### Clubcircuit, network of professional live music venues in Flanders, Belgium.

But for me, there might be another avenue to explore by seeking funding from players who have established themselves in the sector over the past 10 or 20 years. In the high-tech sector, for example, ticket providers. Previously, we went to the printer, printed our tickets ourselves, and sold them at the door through record stores. But now, there is a whole industry making a lot of money from selling tickets online.

The urgency and necessity lie with stakeholders within the live music industry: they must recognize their place within a shared, interdependent ecosystem built on solidarity. Ideally, **redistribution mechanisms** would be developed within the industry itself, but public authorities can play a critical role in encouraging their creation.

In France, for example, the Centre National de la Musique (CNM), a government-backed organization, **introduced a 3.5% tax on ticket sales and performance rights fees** starting in January 2024. This tax applies to both paid and free performances, with the amount being calculated based on the revenue generated from ticket sales or the rights to perform a show. For paid-entry events, the tax is levied on the price spectators pay for admission, while for free events, it is based on the fees received for the rights to exploit the performance. The CNM uses the funds to finance a wide range of redistribution programs aimed at promoting the sustainability and development of live music venues, festivals, and cultural initiatives across the country. Another recent example is the UK government's initiative in November 2024 to address the increasing closures of grassroots venues. The UK government has endorsed a **voluntary ticket levy on stadium and arena events** to support grassroots music venues. Recommended by the Culture, Media, and Sport Committee, this initiative proposes that a portion of each ticket sold at large venues be allocated to smaller venues, artists, and promoters. The Music Venue Trust (MVT), a key advocate for this reform, has described it as the most significant policy change in decades for the live music sector.

Such structuring will not occur without incentives from public authorities. More importantly, it will require a new framework and time for stakeholders to accept and integrate this new kind of model. In the meantime, challenges remain significant for most of the venues we interviewed. While some do not feel directly threatened in the short term—thanks to renewed public funding for the coming year, maintained budgetary balance, or functional revenue diversification—the medium to long-term outlook remains highly uncertain for everyone. For some, the focus is on waiting for the crises to subside (following COVID-19, the war in Ukraine, and inflation). For others, major difficulties lie ahead, including the rise of far-right parties in government, revenue concentration and the climate crisis.

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[MAP OF CHALLENGES](#)