

# Advocacy Roadmap 2025-2029



## TOPIC 1. Tackling inflation and financial instability in the live music sector

### *Line of action: European fiscal reforms to support the live music sector*

The live music sector in Europe continues to grapple with significant economic pressures in the aftermath of the COVID-19 pandemic. Following nearly two years of forced closures, concert venues were immediately confronted with the full impact of Europe's inflation crisis, with key venue operational costs experiencing substantial price increases. Additional financial burdens, including rising rents and general overhead expenses, further strained the sector. While inflation has since stabilized at 2.6%, it remains a persistent challenge for live music venues. Beyond general inflationary pressures, the live music industry is experiencing sector-specific cost inflation. In an era dominated by digital streaming, live performances have become a primary revenue source for artists. Consequently, demand for well-paid live performances has increased, driving up artist fees. Rising living costs have further compelled artists to seek higher compensation to sustain their careers. Additionally, the costs associated with touring—particularly fuel, transportation, and logistics—have also surged, making travel significantly more expensive for artists and their crews. This has rendered extensive tours financially unviable without substantial earnings, particularly for emerging and mid-level artists. This shift places additional financial strain on venues, which must balance rising expenses with maintaining affordable ticket prices for audiences.

**What is the risk?** a major concern is that venues are being forced to cut back on innovative and diverse programming to survive financially. Emerging artists, niche genres, and risk-taking performances are often sacrificed in favour of more commercially viable acts, reducing the sector's cultural diversity. Without intervention, continued financial strain may lead to the closure of venues, reduced touring opportunities for emerging artists, and a decline in Europe's status as a global hub for live music.

### **Solutions**

A coordinated and forward-looking strategy must be developed at both national and European levels.

Member States are encouraged to explore innovative fiscal reforms based on resource provided by Live DMA, such as implementing tax offset schemes of 5–10% for independent live music operators and introducing targeted tax incentives for venues that champion emerging and non-mainstream artists. These measures would not only ease financial pressures but actively promote artistic diversity and renewal. In addition, lowering VAT rates on live music tickets and artist fees at national levels, as already successfully implemented in some countries can immediately enhance access to culture for audiences while strengthening the financial viability of venues. At the European level, there is a valuable opportunity to establish redistribution mechanisms—such as levies on streaming platforms and major ticketing operators—to finance a dedicated EU-wide live music fund, providing much-needed resources for smaller and independent venues.

Within the sector itself, embracing Fair Practice Codes offers the chance to build a more collaborative, transparent, and sustainable ecosystem, ensuring that production costs are shared more fairly among all stakeholders. Importantly, the drive to reduce production costs goes hand in hand with a commitment to green sustainability—encouraging investments in energy-efficient technologies eco-responsible event production to lower the costs for venues.

## TOPIC 2. Live music recognition in public policy and funding

### *Line of action: Dedicate an ambitious budget for culture and music in Europe*

Despite its undeniable cultural, social, and economic contributions, the live music sector remains largely overlooked in public policy frameworks. Political shifts across European countries are increasingly deprioritizing cultural policies, creating an uncertain environment for live music. As cultural funding is scaled back, independent venues, festivals struggle to access financial support, limiting their ability to sustain operations and contribute to local and national economies.

In several European countries, popular music is still not fully recognized as part of culture, and this lack of institutional acknowledgment restricts access to cultural funding and policy support. Despite being one of the most significant cultural expressions of modern society—shaping identities, fostering creativity, and engaging millions of people—popular music is often marginalised from national cultural strategies that prioritize classical arts, heritage conservation, and traditional institutions.

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At the European level, financial support for the live music sector remains disproportionately low compared to other cultural industries. While initiatives like Music Moves Europe attempt to support the sector, the allocated funding is inadequate given the industry's scale and impact. Music-related projects received only 3.5% of the overall Creative Europe budget, which itself constitutes just 0.16% of the total EU budget. Meanwhile, cinema funding under Creative Europe received about 58% of the total funding, demonstrating a major imbalance in cultural investment.

**What is the risk?** This chronic underfunding weakens the capacity of small and medium-sized venues, independent promoters, and emerging artists, all of whom play a crucial role in the live music ecosystem. Without a more substantial commitment, the sector remains at risk of decline, limiting cultural access and the development of new talent. The weakening of cultural policies not only threatens live music infrastructure but also risks diminishing Europe's reputation in terms of cultural diversity and freedom of expression.

## Solutions

It is essential first to recognize live music venues as a public good and formally integrate them into national cultural policies. These spaces are more than entertainment venues—they are vital infrastructures for artistic innovation, community building, and cultural democracy. Including them alongside traditional arts and heritage institutions would ensure that live music is given the political visibility and structural support it deserves. Furthermore, there is an urgent need to rebalance public funding between popular and classical music. Correcting this imbalance would offer a powerful lever to support venues and emerging artists, allowing the full spectrum of Europe's musical creativity to flourish. At the European level, the development of a dedicated funding programme for music within Creative Europe is a crucial step. By securing 2% of the EU Multiannual Financial Framework (MFF) for culture and increasing the Music Moves Europe budget to at least €50 million over five years, the EU can ensure that live music venues, clubs, and festivals have the means to thrive sustainably.

## TOPIC 3. Protecting live music venues from gentrification and noise complaints

*Line of action: Integration of live music venues into urban policies at both EU and national levels.*

Live music venues and clubs are increasingly undermined by inadequate urban planning policies, leading to real estate speculation and noise complaints that threaten their survival. Without proper protective measures, live music venues face forcing closures that harm both local communities and the broader music ecosystem. As urban areas become more desirable, property values and rents surge, placing financial strain on independent music venues. Respondents from across Europe report that once-affordable neighborhoods have been transformed by high-end developments, making it increasingly difficult to sustain music spaces. In Bologna, rising accommodation costs make it nearly impossible for venues to host touring artists affordably. In Berlin, real estate speculation has reached a level where finding new spaces for cultural venues is no longer feasible. In Tampere, small venues are disappearing from city centers as they are pushed into less accessible suburban areas. Ironically, cultural venues often act as catalysts for gentrification, drawing attention to an area and increasing its appeal, only to be displaced when the neighbourhood's economic profile shifts.

Noise complaints represent another major challenge. As highlighted in the "Music is Not Noise" initiative, classifying music alongside road traffic and industrial noise misrepresents its cultural significance. The failure to distinguish between disruptive noise pollution and cultural soundscapes leads to unfair restrictions on live music venues. Many urban development projects fail to adequately integrate live music venues into city planning, leading to ongoing disputes between cultural spaces and new residents. When new residential developments fail to incorporate appropriate soundproofing and insulation, the burden of noise mitigation falls on music venues. Many are forced to invest in costly renovations or face operational restrictions, which can ultimately lead to closures.

**What is the risk?** The absence of clear policies to protect venues from displacement, excessive rent increases, or noise-related disputes makes them particularly vulnerable.

## Solutions

To ensure the long-term protection of live music venues against the pressures of gentrification and noise complaints, a proactive strategy must be adopted at European, national, and local levels. Live DMA proposes the creation of The Watchtower, a dedicated toolbox designed to gather and share best practices, advocacy recommendations, and regulatory frameworks such as the Agent of Change principle. This platform would serve as a resource hub for local, regional, and national stakeholders, offering concrete examples and arguments to support the integration of live music into sustainable

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urban development strategies. It would also act as an "argumentation package," equipping Live DMA members and their networks with ready-to-use tools to advocate for live music venues in their local contexts. In parallel, Live DMA advocates for the establishment of a European label for live music venues, inspired by the European Heritage Label, to formally recognize venues as cultural infrastructures and public goods. This label would not only offer venues symbolic protection but also encourage Member States and municipalities to engage in structured dialogues between policy makers, urban planners, and music sector representatives, and explore exemptions for venues. Furthermore, to address conflicts around noise pollution, it is essential to promote investment not only in the soundproofing of venues, but also in the noise insulation of newly developed or renovated residential buildings in their vicinity. By combining recognition, knowledge-sharing, and dialogue, these initiatives will help embed live music venues at the heart of urban cultural policies, ensuring they are preserved and promoted as essential contributors to vibrant, diverse, and resilient cities.

## TOPIC 4. Addressing market concentration and monopolistic practices in live music

### *Line of action: Strengthen the EU competition law to keep the sector competitive*

Recent trends indicate a growing market concentration, with large corporations, often with ownership outside of the EU, increasingly dominating the sector. This consolidation poses substantial challenges to independent venues and festivals, threatening the diversity and accessibility of live music across Europe.

The COVID-19 pandemic severely impacted the live music sector, leading to prolonged closures and financial instability. Independent venues and festivals, lacking substantial financial reserves, became susceptible to acquisitions by larger corporations, sometimes non-music related, seeking to expand their portfolios. This trend raises concerns about the preservation of the unique cultural identities and community-focused missions that these independent entities embody. The live music market is now experiencing a structural shift, with major corporations increasingly controlling significant shares of the market. Independent venues and promoters struggle to compete with the extensive resources and influence of these large entities, leading to reduced opportunities for emerging artists and a less varied cultural landscape. Independent promoters and venues face challenges in securing bookings, negotiating fair terms, and attracting audiences, as major corporations often have exclusive agreements with popular artists and control over key distribution channels and ticketing.

**What is the risk?** This imbalance stifles innovation and limits consumer choice, undermining the overall health of the live music ecosystem.

### **Solutions**

Recognizing that large players play a complex role—both as providers and competitors—Live DMA proposes to open a structured dialogue between independent and major actors, raising awareness of imbalances and fostering voluntary redistribution practices, as demonstrated by positive examples in the UK. Finally, long-term support for sector-wide networks and collective advocacy efforts is essential to strengthen the operational and political capacity of independent venues, ensuring that fair competition, diversity, and cultural vitality remain at the heart of Europe's live music landscape. To address the growing risks of market concentration and monopolistic practices in the live music sector, Live DMA proposes a twofold strategy combining regulatory action and sector dialogue. Firstly, the European Commission must strengthen antitrust enforcement, ensuring that mergers and acquisitions in the live music industry are rigorously scrutinized to prevent excessive consolidation and unfair competition. In parallel, Live DMA advocates for better regulation of ticket sales, improving price transparency, limiting the use of dynamic pricing, and preventing abusive practices in the secondary market. To ensure long-term oversight, a Music Observatory on the threats to independence should be established, acting as a watchdog body to monitor market dynamics, assess corporate influence, and inform future policy decisions. At the same time, it is crucial to facilitate access to credit for independent venues and promoters through financial instruments such as low-interest loans or guarantees, helping smaller actors remain competitive. Live DMA also calls for incentives to promote diverse programming, following the successful Europa Cinemas model, to reward venues that invest in artistic variety and cultural diversity.

## TOPIC 5. Improving working conditions and wages in the live music sector

*Line of action: Implement reforms and training opportunities for cultural workers*

Small and medium-sized live music venues face significant challenges in providing fair compensation and sustainable working conditions for cultural workers. These challenges threaten the sector's attractiveness, particularly for young professionals. Smaller venues often operate on narrow profit margins, making it difficult to offer competitive wages and benefits to their staff. This financial fragility hampers their ability to attract and retain skilled professionals, leading to a talent drain. Secondly, the sector is characterized by irregular work patterns, freelance contracts, and a lack of social security benefits. Such precarious employment conditions deter professionals seeking stable career paths. The COVID-19 pandemic exacerbated existing vulnerabilities, leading to workforce shortages as many professionals left the industry due to prolonged closures and uncertainty. This exodus has intensified the challenges in staffing venues adequately. High-pressure environments, irregular hours, and job insecurity contribute to mental health issues among cultural workers. The pandemic further highlighted these challenges, emphasizing the need for comprehensive support systems.

### What is the risk?

Without reform, the sector will continue to experience a talent drain, as skilled professionals leave for more stable career opportunities, undermining the capacity of venues to deliver high-quality, diverse programming. Persistent precariousness, irregular work patterns, and inadequate social protections exacerbate mental health issues among cultural workers, further increasing turnover and instability. This cycle threatens not only the operational resilience of small and medium-sized venues but also the cultural diversity and innovation that depend on a strong, committed workforce.

### Solutions

Improving working conditions and wages in the live music sector is both a shared aspiration and a complex challenge. Live music venues are committed to offering better employment standards, yet they face structural constraints: many operate with fragile margins, and in numerous countries, collective labour agreements for live music workers are either absent or poorly adapted. At the European level, a positive first step would be to establish a European Fair Practice Code promoting transparent and fair employment standards without immediately raising employers' costs. Complementary to this, the sector calls for broadening access to social protections for freelancers, who often fall outside traditional frameworks.

To move forward, it is crucial to convene a summit with key stakeholders—venues, promoters, artists representatives, and labels—to foster a better mutual understanding of the economic realities each actor faces. Changing the narrative is also vital: policymakers often overestimate the profitability of the live music sector without recognizing that independent venues operate on razor-thin margins, absorbing most of the financial risk. Updated research through a Music Observatory, including new data on wages, working conditions, and value distribution at live performances, will be essential to correct this perception. Moreover, improving working conditions must be seen not as an isolated cost but as an investment in stability, staff retention, and quality. Better wages and working environments will help address the high turnover and mental health issues affecting venue teams today. By combining policy reforms, updated narratives, and sector dialogue, Europe can build a live music ecosystem where fair work, cultural vibrancy, and economic sustainability reinforce each other.

## TOPIC 6. Towards a more inclusive live music sector

*Line of action: Provide incentives and monitoring tools for diverse programming and workforce inclusion*

The live music sector remains structurally unequal, with gender disparities, barriers for marginalized communities, and exclusionary practices still prevalent across Europe. While progress has been made, several critical issues continue to limit inclusion: women and gender minorities remain underrepresented in live music programming. Despite initiatives like Keychange, which set targets for 50/50 gender representation, festivals and venues are still overwhelmingly cis-male-dominated. Studies (2024) show that 92% of headliner slots at major European festivals are occupied by cis-male artists, and many venues lack gender diversity in their programming. There is no harmonized method for data collection on gender representation in festival lineups and venue programming, making it difficult to track progress and enforce accountability.

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The live music workforce is highly gender-segregated, with women concentrated in lower-paid roles (catering, marketing) while men dominate technical and managerial positions. Gender biases affect hiring practices, career progression, and access to networking opportunities, reinforcing a "boys' club" culture in the industry. Studies show that many festivals and clubs lack clear policies and training to prevent and address sexualised violence, leaving victims without adequate support. Security staff and venue operators are often unprepared to handle gender-biased violence cases, reinforcing a culture of silence and inaction. Beyond gender, racial and ethnic minorities, LGBTQ+ individuals, and people with disabilities face additional barriers to participation and inclusion in the live music sector. Limited accessibility in venues—from physical barriers for disabled attendees to unwelcoming environments for marginalized groups—restricts cultural participation. Funding and policy frameworks rarely prioritize intersectional inclusion, leaving organizations struggling to implement meaningful change.

**What is the risk?** The absence of diverse voices in programming and leadership roles limits artistic innovation, narrows audience engagement, and weakens the sector's ability to reflect and resonate with broader society. Moreover, failure to address gender-based violence, accessibility barriers, and systemic inequalities undermines the trust of artists, workers, and audiences alike. If these disparities persist, the live music sector risks becoming less attractive to emerging generations, less representative of Europe's rich social fabric, and less resilient in facing future cultural and social shifts.

## Solutions

To build a more inclusive live music sector, a series of coordinated actions must be undertaken at the European level. The EU Work Plan for Culture should be revised to explicitly prioritize gender equality, diversity, and accessibility across cultural policies, ensuring that inclusion becomes a core strategic objective rather than a secondary consideration. In parallel, the Creative Europe programme should expand its funding scope to provide specific incentives for venues and festivals that promote diverse programming and foster inclusive workforce practices. To monitor progress effectively, it is essential to develop a harmonized EU methodology for tracking gender diversity in festival lineups and venue programming, a task that could be coordinated through the newly proposed Music Observatory. Finally, achieving a genuinely accessible cultural landscape will require a dedicated allocation of EU funds to support venue accessibility improvements by 2030, ensuring that live music spaces welcome all audiences and cultural workers, regardless of their physical abilities.

## TOPIC 7. Addressing audience behaviour shifts and ticketing challenges

*Line of action: Research, incentives and EU-wide ticketing regulation through consumer protection laws*

The European live music sector is facing profound shifts in audience behavior and ticketing dynamics, exacerbating financial instability for small and medium-sized concert venues. Changes in post-pandemic consumer habits, market unpredictability, and monopolistic ticketing practices have made it increasingly difficult for independent venues to operate sustainably. Post-pandemic consumer habits have shifted, with audiences purchasing tickets much closer to event dates, creating cash flow instability for venues and promoters. This unpredictability hinders financial planning, staff hiring, and event promotion strategies. The EU live music sector is highly concentrated, with major players controlling a significant share of ticketing. The adoption of dynamic pricing models (where ticket prices fluctuate based on demand) has led to extreme price inflation. Many ticketing platforms impose undisclosed fees, misleading consumers about the actual cost of attending events. The post-pandemic shifts in audience behavior and monopolistic practices in ticketing pose a serious threat to the accessibility and diversity of live music in Europe. By implementing stronger competition policies and fairer ticketing regulations, the EU can ensure fair competition, cultural diversity, and consumer protection.

**What is at the risk?** Without fairer consumer protection regulations and more balanced competition, Europe could see a shrinking independent live music ecosystem, limited cultural choice for audiences, and greater concentration of market power in the hands of a few dominant players.

## Solutions

The creation of a dedicated research programme through the Music Observatory will be key to understanding changes in generational attitudes and cultural participation trends, enabling data-driven solutions tailored to the sector's real needs. At the same time, it is vital to incentivize young and new audiences through audience development programmes, including partnerships between venues and schools, ensuring that live music remains accessible and integral to the cultural lives of future generations. Ensuring full price transparency in ticket sales is another essential step, requiring a clear EU directive



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mandating upfront disclosure of all service and transaction fees. The EU should also move to regulate secondary ticketing markets, banning speculative resales and limiting price inflation through strict resale caps to maintain fair access for audiences. Moreover, tackling market concentration in ticketing and promotion must be a priority: the European Commission's DG COMP should investigate and impose limits on vertical integration to ensure a healthy, competitive environment for independent venues and promoters. In parallel, local and regional governments should be encouraged to develop affordable ticket initiatives, independent ticketing platforms, and positive discrimination policies that support grassroots cultural events. At EU level, financial accessibility to culture and live music must be strengthened through targeted support schemes, subsidies, and inclusion mechanisms, ensuring that cost is never a barrier to participation — not only for young people and students, but also for other low-income groups who face economic obstacles to cultural engagement. Live DMA can play a key role by advocating for these measures at the European level, facilitating knowledge exchange on good practices among its members, and supporting the development of collective initiatives such as solidarity ticketing schemes and audience inclusion programmes. Additional measures, such as lowering VAT rates on live music tickets across Member States and creating funding schemes to make cultural participation economically accessible to all, can further ensure that live music remains an inclusive and vibrant experience. Together, these initiatives will create a fairer, more dynamic, and more sustainable live music ecosystem that welcomes all generations.

## TOPIC 8. Promote sustainable strategies and touring opportunities in live music

*Line of action: Provide incentives, strategies and training for greening the live music sector*

Live music venues and festivals, especially larger ones, have a high carbon footprint due to artists and audience mobility, purchases, and energy management. Artist and audience mobility represent the largest carbon footprint in the live music sector. Current infrastructure prioritizes flights over trains, and there is too rare incentive for sustainable routing and slow touring models. While much of the current focus is on emissions reduction, live music events and venues also have a significant impact on ecosystems. By incorporating biodiversity-conscious policies, the live music sector can play a vital role in preserving natural habitats while maintaining its cultural and social impact.

The live music sector's ability to successfully transition towards ecological sustainability is directly tied to its recognition as a key cultural and economic sector and its capacity to collaborate with policymakers. Without formal acknowledgment in environmental and cultural policies, live music venues, festivals lack the financial support, regulatory guidance, and infrastructural investments needed to implement meaningful green initiatives. Only through integrated policymaking and cross-sector cooperation can the live music industry align with the EU's Green Deal objectives to reduce its environmental footprint. The ecological transition of the live music sector is urgent but achievable with targeted EU policies, funding, and regulatory incentives.

**What is the risk?** Without decisive action to promote sustainable touring and greener venue operations, the sector risks falling behind broader EU Green Deal objectives, exposing itself to future regulatory and financial pressures. Continued reliance on high-carbon mobility, energy-intensive operations, and unsustainable production models will not only increase the sector's environmental footprint but also jeopardize public and political support for live music. Moreover, without dedicated incentives, regulatory support, and recognition within environmental policies, many small and medium-sized venues will lack the means to transition toward more sustainable practices, leading to a growing divide between well-resourced and struggling operators

### Solutions

A key priority is to improve infrastructure mobility, including enhanced support for public transport and rail connections, making low-emission touring a viable and attractive option for artists and audiences alike. At the European level, initiating funds to support renewable energy systems (through different EU programmes) —such as solar panel installations and energy-efficient venue upgrades—would help smaller operators transition toward greener operations without compromising their financial stability. Peer learning and the sharing of best practices through cultural networks will ensure that successful sustainability initiatives are widely adopted. Finally, by encouraging every Ministry of Culture to include sustainability objectives, Europe can embed ecological responsibility at the heart of cultural policymaking, ensuring that live music remains a vibrant, responsible, and forward-looking sector for generations to come.