



**LIVE
DMA**
LINKING INITIATIVES AND VENUES IN EUROPE DEVELOPING MUSICAL ACTIONS

THE SURVEY

FACTS & FIGURES OF MUSIC VENUES IN EUROPE



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INTRODUCTION

Live DMA is a strong network of venues and festivals associations all over Europe and represents well over 2100 live music venues and over 400 festivals in 13 European countries.

Since 2012, **Live DMA** is working on structuring the collection of music venues data for statistic research, "The Survey". Live DMA members collect their venues members' numbers about activities, performances, visits, employees, income and expenses. How many artists perform? How many volunteers are involved in the venues activities? Is ticket sales enough to cover the programme costs? How much do visitors spend on food and beverages? Are venues relying on subsidy or audience expenses? These and many other questions are covered by The Survey.

Data is not only used for representation on a national and European level, but also helps individual music venues and municipalities to increase awareness and support for live music in general, and for grassroots venues in particular. Grassroots venues is a term to describe venues that have a focus on live music as

its main purpose and its outcomes, often taking a financial risk with presenting new talents, but very important to the music industry, cultural nightlife economy and the local community. On one hand, our statistics show the grassroots venues' independence, their success, and an impressive amount of activities, visits and people involved to organise concerts. On the other hand, the data reveals the music venues high diversity, sometimes fragile business models and many challenges.

This data presentation starts with the average numbers of music venues from 10 networks in 8 countries that participated in the latest Survey. Then, we will show the totals of all Live DMA members and focus on the difference between smaller and larger venues and also between different regions and countries.

TOTALS OF LIVE DMA MUSIC VENUES*



2109 live music venues
organise **233.500** music activities
with **381.760** artist performances
attract **56.000.000** visits



135.000 total workers
including **49.200** paid employees
and **81.200** volunteers



60% are non-profit
2.240.460.000 € income
2.238.543.000 € expenses

*based on collected data year 2015 of 452 music venues in 8 different countries extrapolated to 2109 music venues as part of Live DMA in May 2017.

SURVEY POPULATION AND RESPONSE

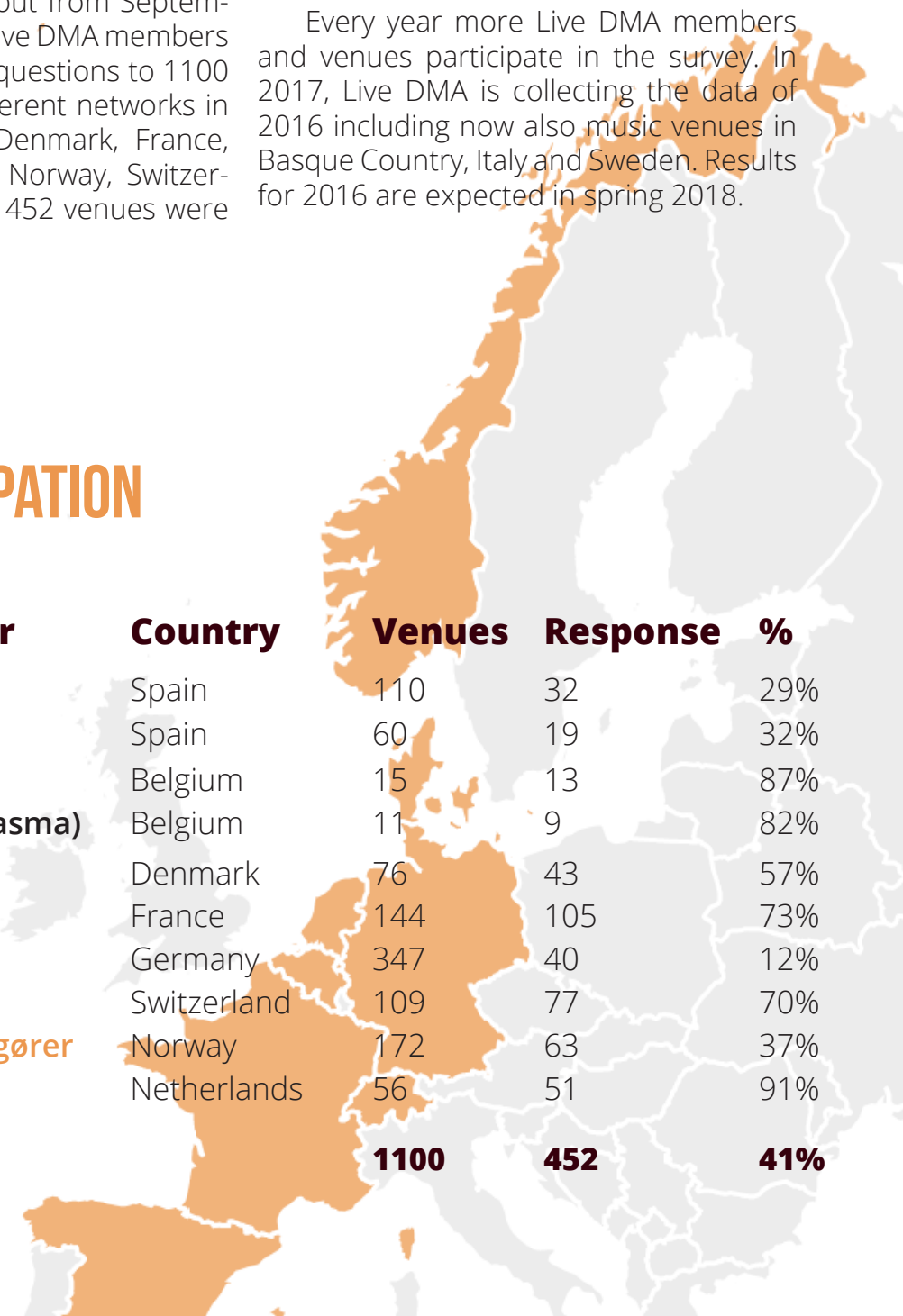
In 2017, Live DMA represents 2109 music venues in 17 different regions in 13 different countries. This study shows the results of the latest survey about the year 2015, that was carried out from September 2016 to May 2017. Live DMA members have sent the same 23 questions to 1100 music venues of 10 different networks in 8 countries: Belgium, Denmark, France, Germany, Netherlands, Norway, Switzerland and Spain. Data of 452 venues were

collected (41% response), which are in this study extrapolated to totals per Live DMA member and to all 2109 music venues within the Live DMA network.

Every year more Live DMA members and venues participate in the survey. In 2017, Live DMA is collecting the data of 2016 including now also music venues in Basque Country, Italy and Sweden. Results for 2016 are expected in spring 2018.

DATA 2015

SURVEY PARTICIPATION



Live DMA member	Country	Venues	Response	%
ACCES	Spain	110	32	29%
ASACC	Spain	60	19	32%
Clubcircuit	Belgium	15	13	87%
Court-Circuit (Club Plasma)	Belgium	11	9	82%
Dansk Live	Denmark	76	43	57%
FEDELIMA	France	144	105	73%
Live Komm	Germany	347	40	12%
PETZI	Switzerland	109	77	70%
Norske Konsertarrangører	Norway	172	63	37%
VNPF	Netherlands	56	51	91%
TOTAL		1100	452	41%

THE AVERAGE MUSIC VENUE

In this study, we notice a high diversity of music venues regarding activities, employment and financial structures. Therefore, we like to emphasize that totals and averages in this data presentation are not representative of any individual music venue. We focus on the diversity later,

but first we draw an overview of a theoretically average music venue in Europe. The theoretically average music venues is an average of music venues in different European regions with a wide range of audience capacities.

CAPACITY

The average audience capacity of a live music venue is **538**, the median capacity is **400**.

ACTIVITIES AND VISITS

111 music activities per year
227 music performances per year
26.533 audience visits per year
of which **78%** paid visits and **22%** free

EMPLOYMENT

64 persons work, in average, in a live music venue.

>>> of which **39** are volunteers

>>> of which **23** are paid employees

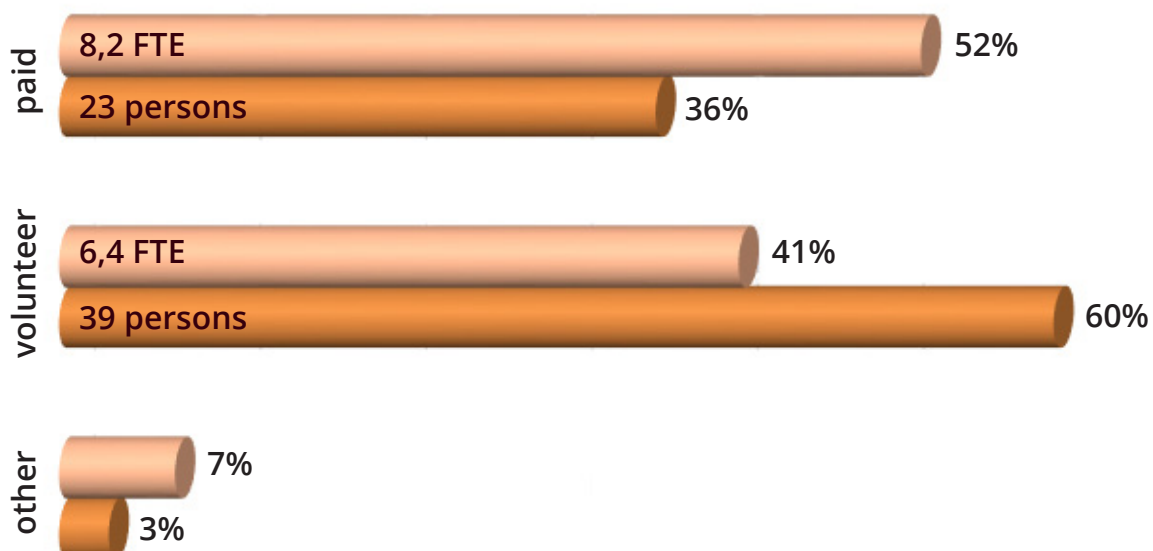
>>> of which **2** are other workers

In average, that represents **15,6** Full Time Equivalent (FTE)

>>> of which **8,2** FTE are paid employees

>>> of which **6,4** FTE are volunteers

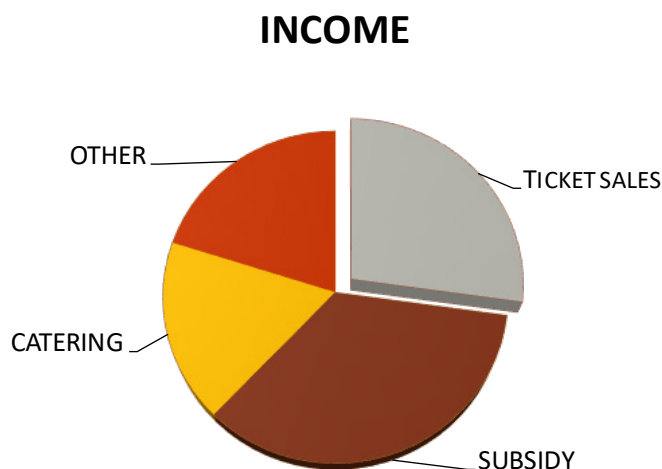
>>> of which **1,0** FTE are other workers



INCOME

The average total income is **1.062.333 €**

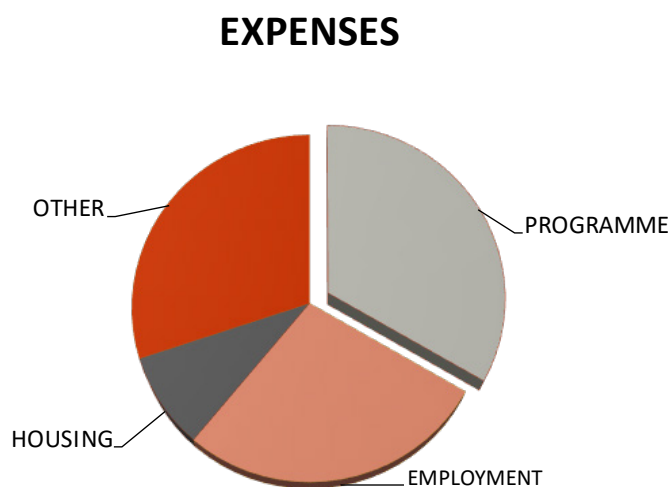
- >>> Ticket sales **27%**
- >>> Subsidy **35%**
- >>> Food and beverage **18%**
- >>> Other income **20%**



EXPENSES

The average total expenses are **1.061.424 €**

- >>> Direct programme costs **33%**
- >>> Employment costs **28%**
- >>> Housing costs **9%**
- >>> Other expenses **30%**



INTERESTING:

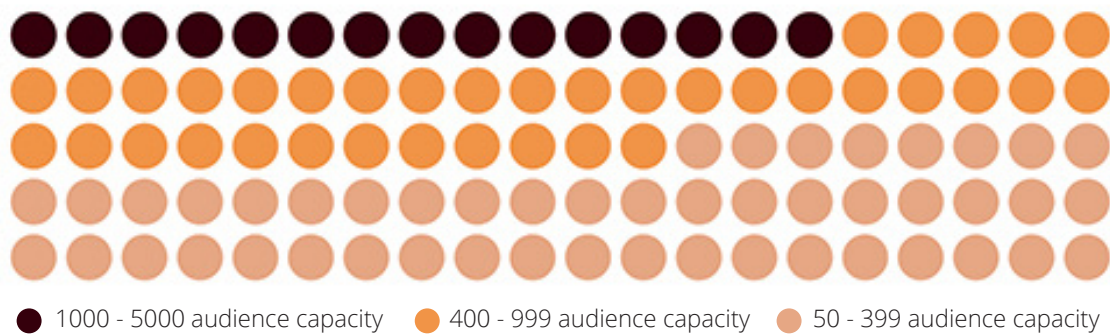
Ticket sales per paid visit represent, in average, **11,55 €**.

Subsidy per visit represents, in average, **11,61 €**.

DIVERSITY OF AUDIENCE CAPACITY

The music venues audience capacities range from venues with one concert hall for 50 visitors, to venues with five concert halls with a total capacity of over 5000. Because the largest capacity venues increase the average (538 capacity) we rather use the median capacity (400 capacity) and conclude that most venues are rather small. The survey results show that 48% of all music venues are below

400-audience capacity and 37% are medium-sized (400 to 999 capacity). Only 15% of the venues have an audience capacity of 1000 or higher. These venues are the grassroots where local and emerging artists start their careers and gain the necessary experience and awareness of the music industry and audience.

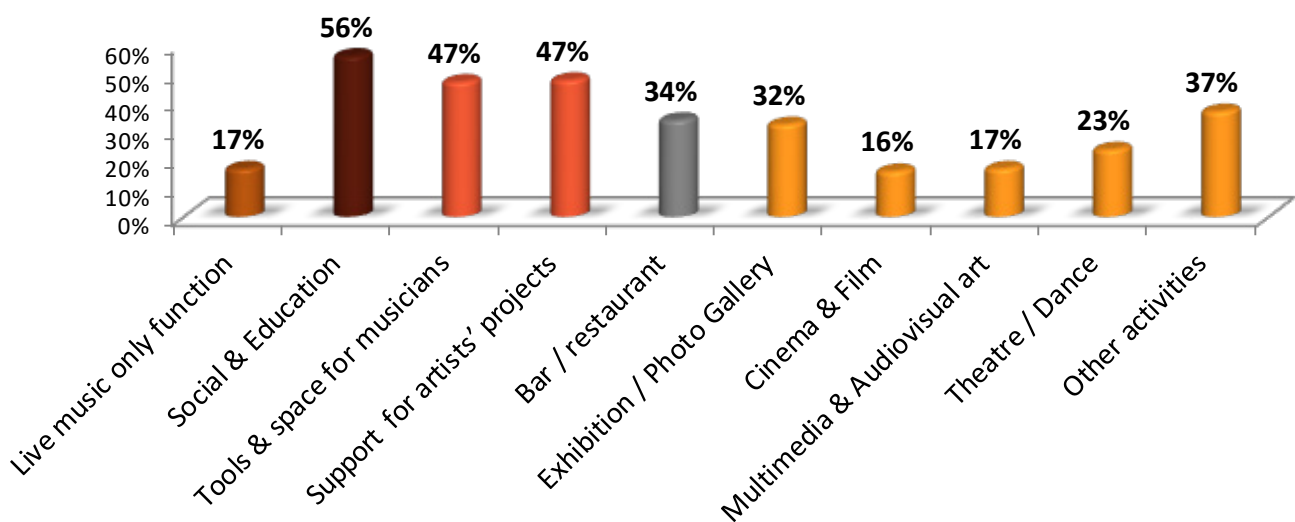


DIVERSITY OF ACTIVITIES

The music venues all share their core business of organising live concerts and programming music, but actually only 17% of the venues organise live music only. Half of the venues manage social and educational activities, rehearsal spaces, support and projects for artists. One third of all venues run a bar or restaurant outside concert hours. In addition,

many venues have multidisciplinary functions and host a cinema, theatre, photo gallery or organise other non-music activities. Music venues play an important role in the cultural life in rural areas, as well as cities, as a citizen space and meeting place for artistic expression and cultural diversity.

DIVERSITY OF ACTIVITIES



MUSIC ACTIVITIES, PERFORMANCES AND VISITS

Based on the latest survey results, we can estimate the total numbers of music activities, live performances and audience visits of all 2109 music venues in 13 European countries, which are impressive. The Live DMA venues organised a total 233.503 music activities during 2015, where 381.760 live performances of bands, acts and DJ/producers took place. 52% of all music venues also organised music festivals in or outside their concert halls.

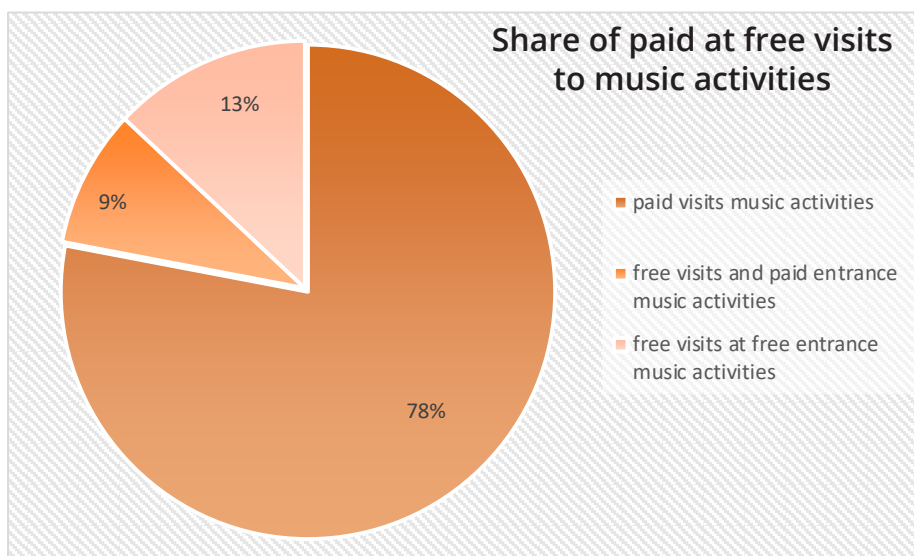
233.503

MUSIC ACTIVITIES

381.760

MUSIC PERFORMANCES

PAID AND FREE MUSIC ACTIVITIES



The music activities, all live concerts and clubnights, were visited by 56.001.250 people. Of these 56 million visitors 78% paid entrance. The other 22% were free visits, of which 9% guest list and 13% visits to free entrance activities.

TOTAL VISITS

Next to live concerts and dance nights most venues also organise non-music activities like theatre, comedy, workshops, public debates and other social and educational activities.

56.001.250

TOTAL VISITS TO ALL LIVE DMA MEMBERS' VENUES

TOTAL EMPLOYMENT

PAID STAFF AND VOLUNTEERS

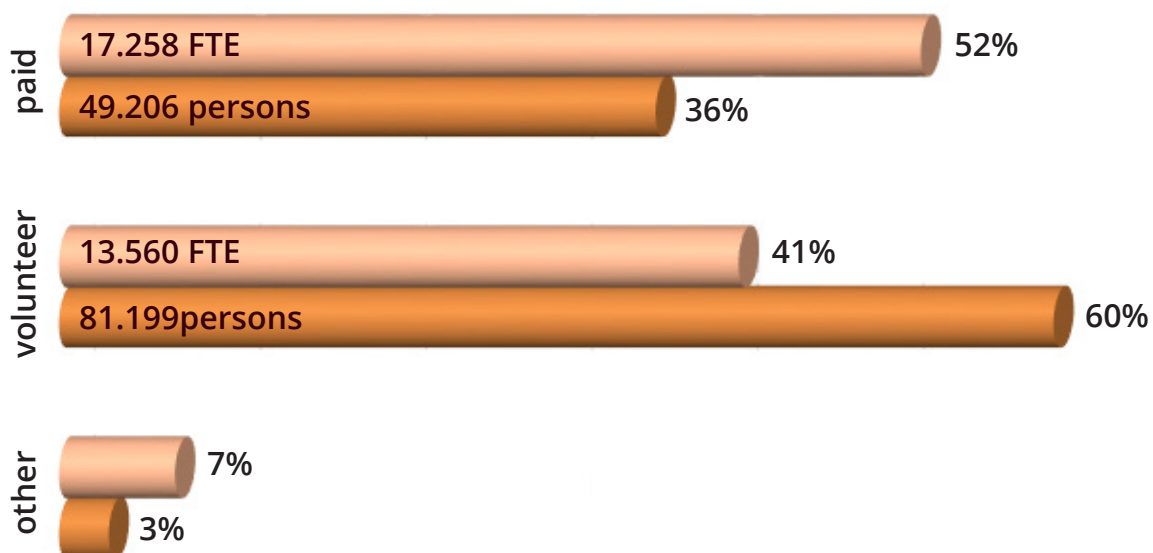
In total, 135.086 people were working in 2015 in one of the 2109 music venues that are part of Live DMA. This is equivalent to 32.976 full time jobs (FTE). The music venues are mostly run by professional paid staffs, but the amount of work volunteers do is essential in most regions, especially for smaller venues and especially during concert hours.

In total, 49.206 paid professionals (17.258 FTE), excluded performing artists, are working at the venues. Next to that 81.199 volunteers (13.560 FTE) are also involved in organizing the venues activi-

ties at the venues. Additionally there are 4.681 other workers (2.158 FTE), like interns and trainees.

Volunteers are mostly active in smaller venues, sometimes for promotion, but mostly during concert hours. They often function for hospitality (bar, wardrobe, etc.) or as sound and light technicians. In this way, they support professional workers and gain new experiences and skills. In many non-profit organizations, volunteers are in charge of the governance as elected board members.

Share of paid employees, volunteers and other workers in persons and in FTE



TOTAL EMPLOYMENT

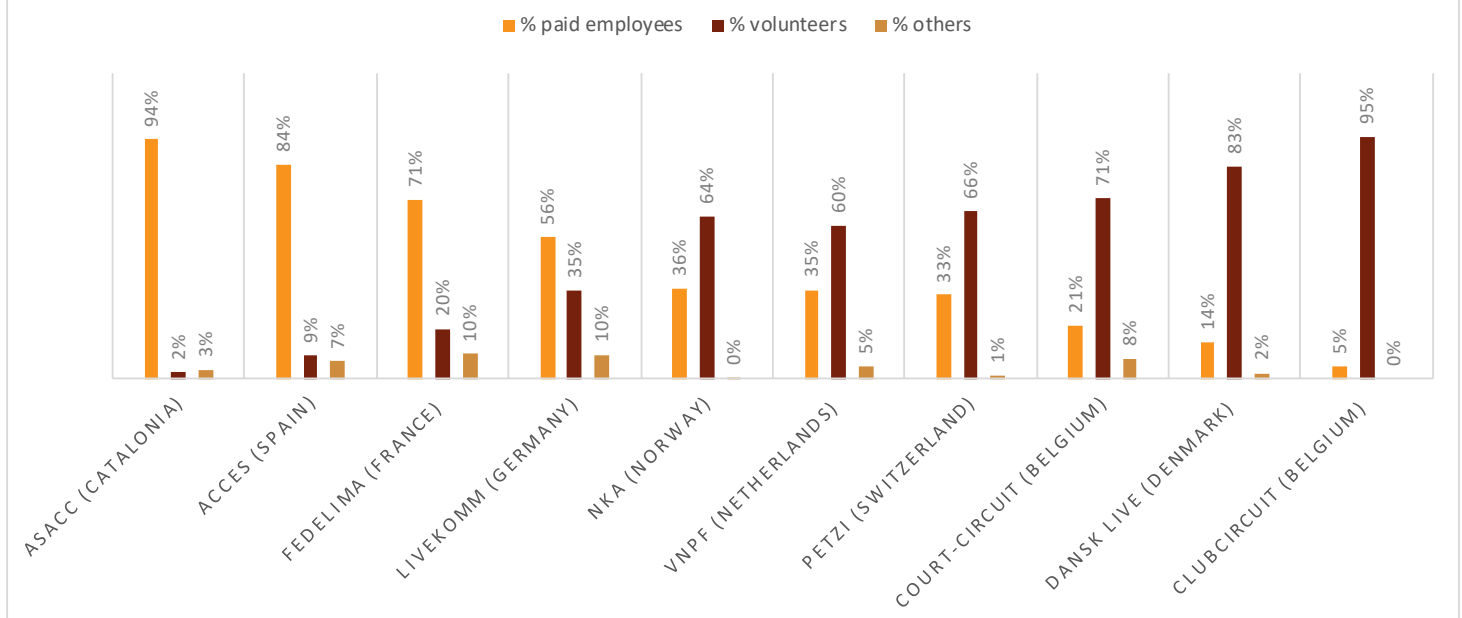
DIVERSITY OF VOLUNTEER WORK IN EUROPE

The graph below shows the high diversity of volunteer work in Europe. The diversity is created by different legal status and different volunteers legislation from one country to another. Spain and Germany have a high share of private commercial venues and therefore less volunteers. In most countries commercial legal structures are not allowed to work with volunteers. In France there's a lower share of volunteers because of different legislation; volunteers cannot receive any compensation and can't take a task or a job that can be done by an employee. In all other European countries in the Survey volunteers are more integrated in the venues business models. Although volunteer work is generally understood as time and effort that are freely given,

in most countries volunteers can get small financial compensation and are rewarded with benefits like discounts on concert visits, drinks, earplugs and other group activities. Also they are often doing important jobs during concert hours handling bar, wardrobe, lights and sound.

Volunteer engagement is often crucial for the economic stability of music venues, especially smaller non-profit venues. The high involvement of volunteers reveals also that the live music sector contributes significantly to added social value by giving everybody the opportunity to take part in a collective adventure and share their passion for live music.

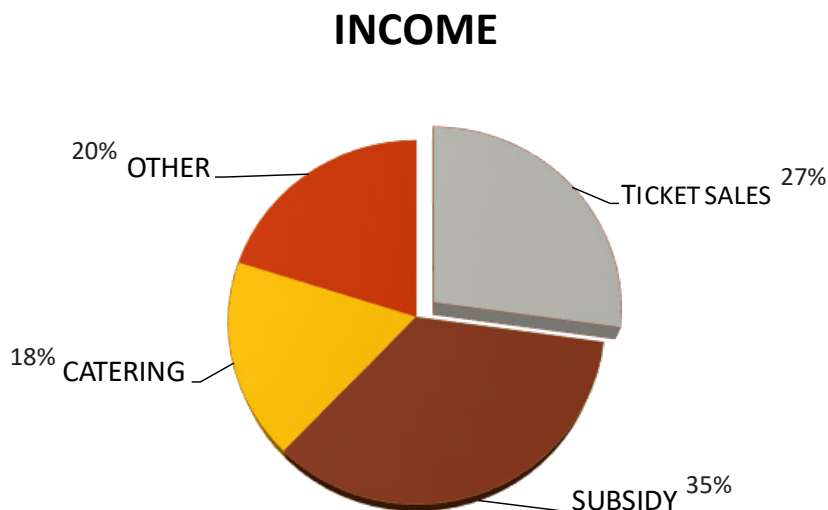
**SHARE OF PAID EMPLOYEES, VOLUNTEERS AND OTHER WORKERS
PER LIVE DMA MEMBER**



TOTAL INCOME

TICKET SALES, SUBSIDY AND CATERING

In total the 2109 music venues represented by Live DMA generated € 2.240.460.592 income in 2015. We see a high diversity in the business models of venues in different regions and with different audience capacities.

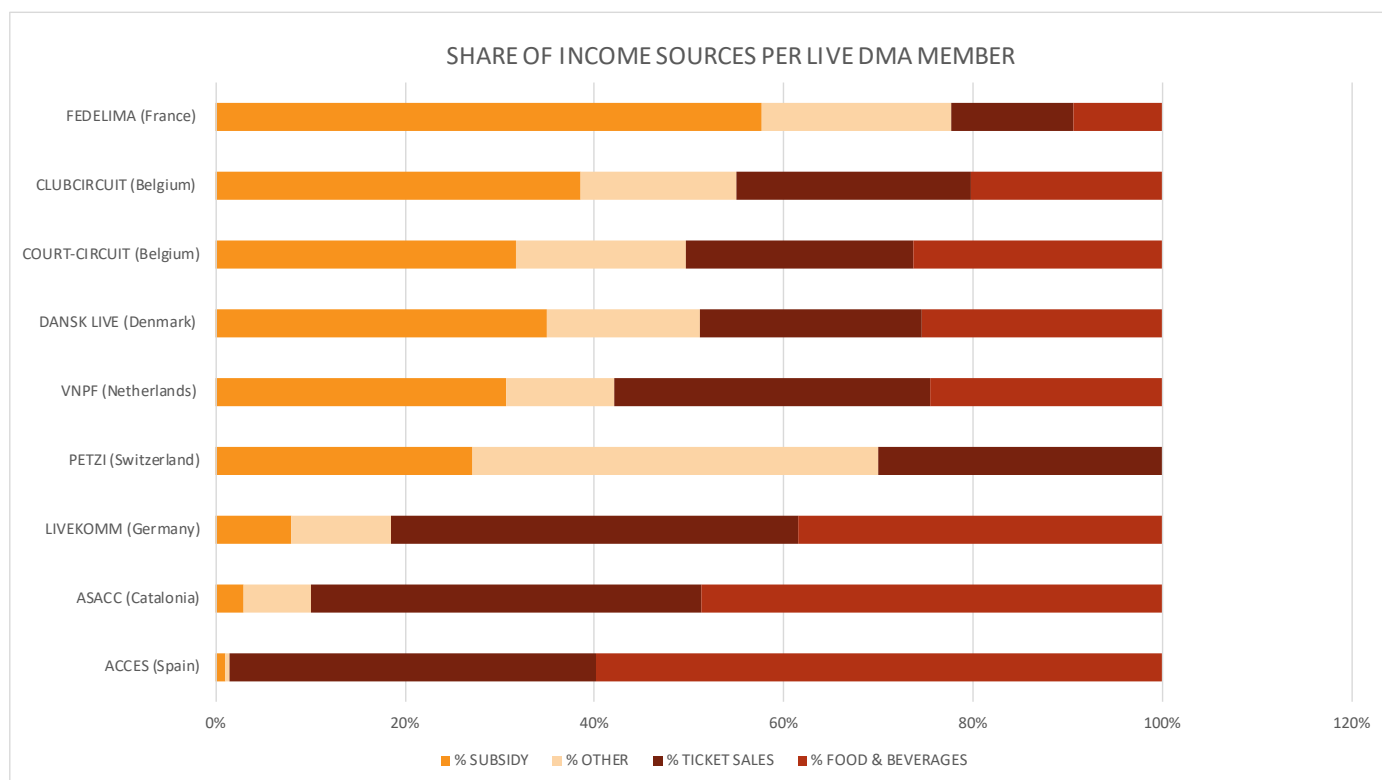


60% of all venues are non-profit. In Germany, Italy and especially Spain we see mostly commercial venues, while Belgium, France, Netherlands and Switzerland have well over 90% non-profit venues. The legal status has often an impact on the venues business models. Non-profit organisations often get financial support of governments as a recognition for their general interest mission and for supporting their work in programming niche music genres and artists that are still at the beginning of their careers. Those subsidies can cover accommodation costs, employees costs, music programme and other

activities without ticketing like community work and educational activities.

Commercial venues often focus and rely more on audience expenses like ticket sales and sales of food and beverages. Therefore, live music venues in Spain, Italy and Germany combine their function more frequently with a bar and/or restaurant. Other countries like Denmark, Netherlands, Norway and Switzerland have a more mixed economy that differs depending mostly on the audience capacity of the venues.

The graph below shows the large difference of income sources between venues part of different Live DMA members, regions and countries:



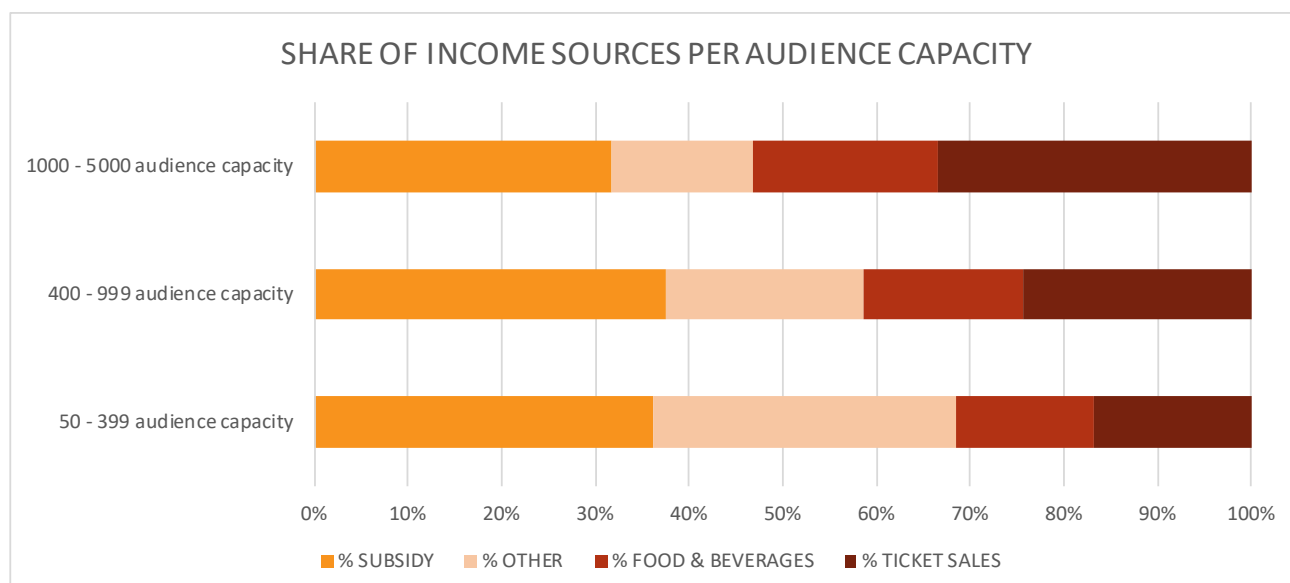
As shown, legal status of music venues and the amount of public subsidies have a decisive effect on business models. Those two aspects vary from one country/region to another.

The third aspect that affects the business models, the size and audience capacity of a venue, is common for all regions/countries. The bigger the venue, the more income from ticket sales and food & beverage they have. Smaller venues cannot generate as much income from audience, because they simply have less audience capacity. They also programme less

known artists with lower entrance fees.

As they generate less income from ticketing and food and beverage, smaller venues depend more on volunteers and subsidies from (local) authorities to maintain the current amount of concerts organised.

The graph below shows the differences between small (<400), medium-sized (400-999) and large (1000+) grassroots music venues. Large venues provide over 50% income of audience expenses, while small venues not

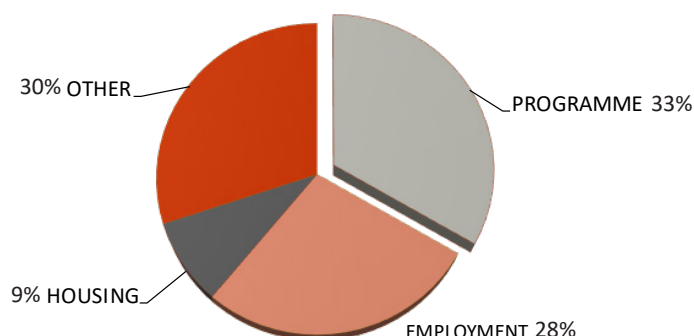


TOTAL EXPENSES

PROGRAMME, EMPLOYMENT AND HOUSING COSTS

In total, the 2109 music venues part of Live DMA had € 2.238.543.983 expenses in 2015. This is slightly less than their total income, which means all venues together had a total positive result of € 1,9 million, an average profit of 909 euro per venue in the year 2015.

EXPENSES



Since 60% of the venues is non-profit, they do not aim to make any profit. The other 40% have a commercial status and are allowed to make profit, but as the numbers show, the profit generated is very low (or barely existent). The profit is not drawn from their music programming activities. In fact, the profit of food and beverage sales is often essential to cover expenses.

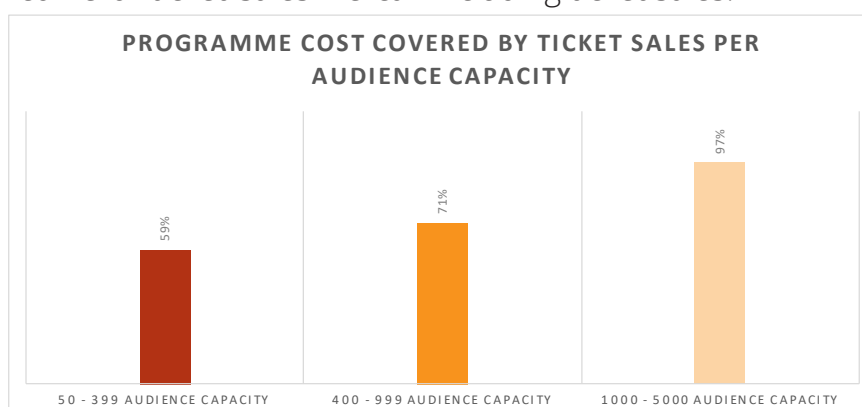
The mix of expenses is strikingly similar in all different European regions and for venues with different audience capacities. For most countries, money is spent mainly on the direct programme costs as well as the employment costs, both roughly one third of the total expenses, followed by the housing costs. Housing costs include rent, electricity, water, cleaning and other accommodation costs.

When we compare the direct programme expenses to the income of ticket sales we can

see that for most venues the ticket sales do not cover the programme costs. In average, large venues ticket sales cover 94% of the direct programme costs. For medium-sized venues this is 71% and for small venues ticket sales cover only 59% of the programme costs.

This means that the current amount of artist performances, especially in smaller venues, can only be maintained if enough income is generated by other sources like sales of drinks and subsidies. The level of covering programme costs with ticket sales also differs per region.

For example in Spain with mainly smaller commercial venues, the ticket sales do bring more income than the programme costs. These venues do not get any subsidy. Therefore, they have to cover their other expenses (housing and employees) with only the audience expenses including ticket sales.



FINAL WORD

The survey clearly shows that the large share of the music venues in Europe are grassroots venues, that invest in new music talents. Many (inter)national popular music artists in all countries, started their careers in the Live DMA venues. It helped them develop their skills and talents and develop an audience. The venues are a crucial part of the chain of talent development and their road to success and a better income. Many established artists acknowledge the important role of music venues and the need for government support, which can be with more awareness, acknowledge for popular music as a performing art, financial investments or changing rules and regulations in favour of the venues activities.

What Artists are saying:



Sir Paul McCartney

“Without the grassroots clubs, pubs and music venues my career could have been very different. Artists need places to start out, develop and work on their craft and small venues have been the cornerstone for this. If we don’t support live music at this level then the future of music in general is in danger.”

SPAIN

In Spain 3 Live DMA members are actively representing 186 music venues in total.

ACCES has 110 Spanish venue members, ASACC represents 60 Catalanian venues and Kultura Live is the network of 16 music venues in Basque Country. Music venues in Madrid are not included in this panorama.

In this study ACCES and ASACC participated with 51 venues delivering their data (30% response). Kultura Live joins the Live DMA survey starting in 2017.

Although there is diversity in Spain with three venue networks in different regions, the survey results show many similarities between the music venues in Catalonia and the rest of Spain (excluding Basque Country). Most venues are private commercial clubs and get no subsidies. Most Spanish venues combine live

music with a bar outside concert hours and are only working with paid employees.

Despite their commercial character, the small venues often have the same cultural objectives as subsidised venues in other countries. Their goal is to present new (local) music talents for a new and diverse audience. Other functions are often necessary tools to generate the income to be able to present live music.

The main difference we see between the venues in the ACCES and ASACC network is that the Catalanian association holds a few much larger venues, which leads to higher numbers, and also a higher share of employment costs.



SPAIN

In Spain the 110 music venues part of ACCES are responsible for organising 19.000 artist performances per year. The concerts attract well over 2,3 million visits.

Music venues in Spain are for 87% commercial venues, which are not supported by governments as much as in other European countries. Subsidy is only 1% of the

total income of all venues. The venues cover the programme costs by the ticket sales and generate most income from sales of food and beverages (60%). Comparing to other European countries, the share of volunteers is very low in Spanish music venues (9% of the total workforce).



110 live music venues
323 average audience capacity (203 median)
13.278 music activities, with 19.064 artist performances
2,3 million audience visits

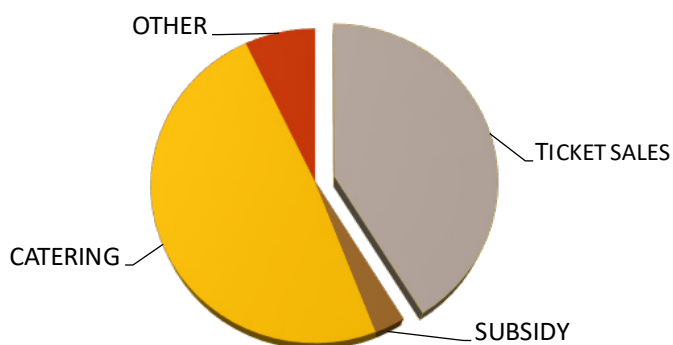


1.232 total workers
including 1038 paid employees (84%)
including 110 volunteers (9%)

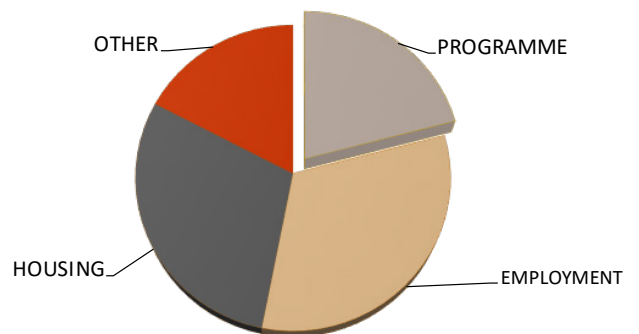


€ 21 - € 26 million income and expenses, 13% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 32 music venues member of ACCES in 2016 and extrapolated to 110 music venues as part of Live DMA in May 2017.

In Catalonia the 60 music venues part of ASACC are responsible for organising well over 34.000 artist performances per year. The concerts attract 5,1 million visits. A few larger venues attract the most part of the audience and increases the averages, but most venues are quite small (187 median audience capacity).

Music venues in Catalonia are for 95%

private commercial venues, which are not supported by governments as much as in other European regions. Subsidy is only 3% of the total income of all venues. The venues cover the programme costs by the ticket sales and generate most income from sales of food and beverages (49%). Comparing to other European countries, the share of volunteers is very low in Catalanian music venues (2% of the total workforce).



60 live music venues

518 average audience capacity (187 median)

17.375 music activities, with 34.102 artist performances

5,1 million audience visits



1.996 total workers

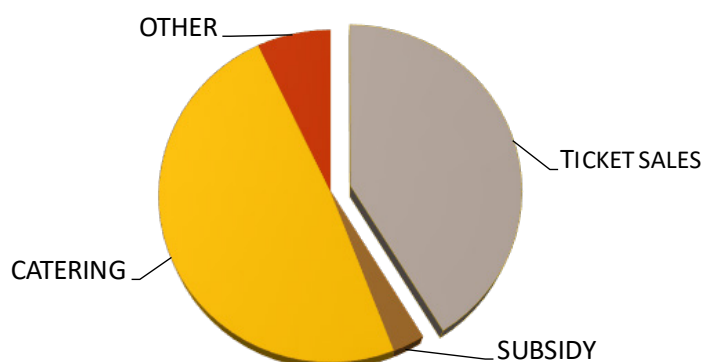
including 1.879 paid employees (94%)

including 47 volunteers (2%)

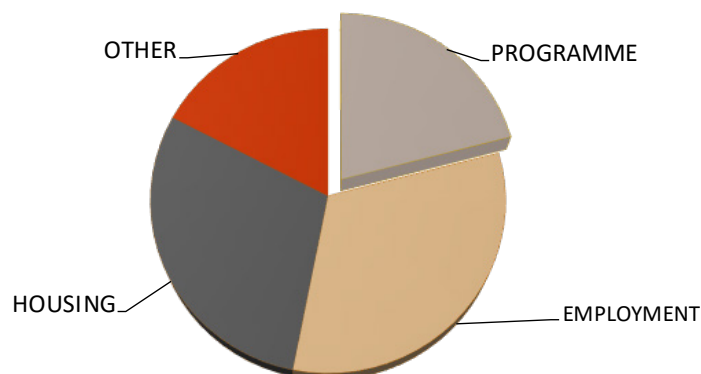


€ 49 - € 50 million income and expenses, 5% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 16 music venues member of ASACC in 2016 and extrapolated to 60 music venues as part of Live DMA in May 2017.

BELGIUM

In Belgium 2 Live DMA members are active representing 26 music venues in total.

Clubcircuit has 15 venue members in Flanders, the Dutch speaking part of Belgium. Court-Circuit is a network of 11 music venues in Wallonia, the French speaking part of Belgium. Clubcircuit and Court-Circuit participated in the survey with 22 venues delivering their data (85% response).



In Flanders the 15 music venues part of Clubcircuit are responsible for organising over 2.700 artist performances per year. The concerts attract almost half million people. All venues are non-profit. The venues run mostly with volunteers (95% of all workforce).



15 live music venues
831 average audience capacity (600 median)
1.191 music activities, with 2.743 artist performances
465.786 audience visits

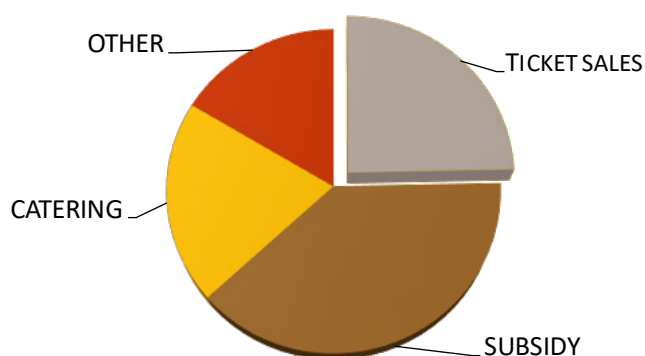


3.085 total workers
including 145 paid employees (5%)
including 2.940 volunteers (95%)

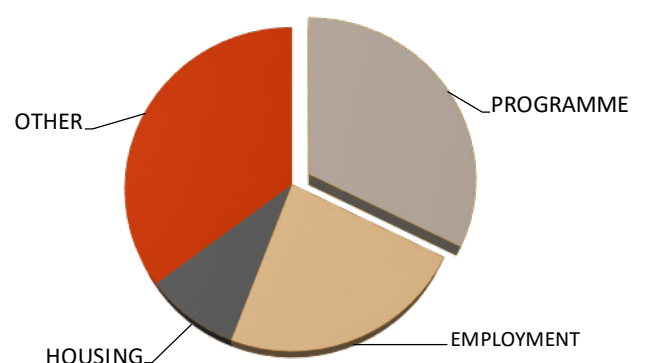


€ 20 million income and expenses, 100% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 13 music venues member of Clubcircuit in 2016 and extrapolated to 15 music venues as part of Live DMA in May 2017.



COURT CIRCUIT

WALLONIA

In Wallonia, the French speaking part of Belgium, the 11 music venues part of Court-Circuit are responsible for organising 2.004 artist performances per year. The concerts attract over 165.000 visitors. A lot of volunteers are involved in the venues (71% of

all workers). All venues are non-profit. More money is spend on programme costs than is generated with ticket sales. The venues get subsidy from governments (32% of total income) to cover part of the programme, employment and housing costs.



11 live music venues

467 average audience capacity (400 median)

781 music activities, with 2.004 artist performances

165.105 audience visits



383 total workers

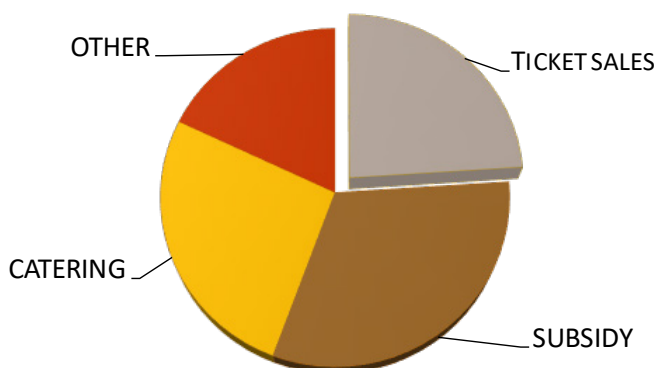
including 81 paid employees (21%)

including 271 volunteers (71%)

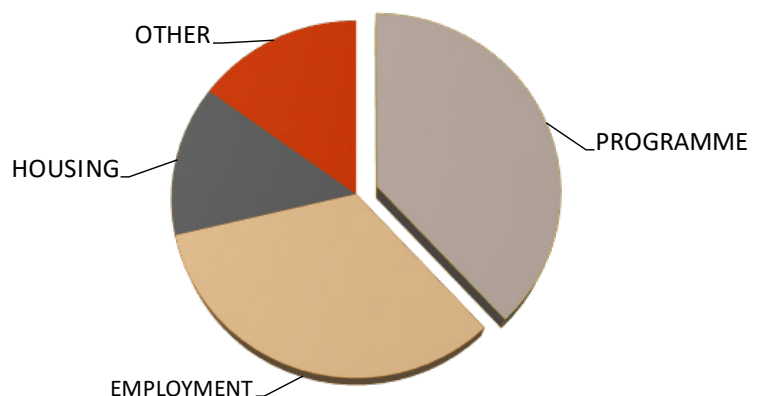


€ 4 million income and expenses, 100% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 9 music venues member of Court Circuit in 2016 and extrapolated to 11 music venues as part of Live DMA in May 2017.

DANSK LIVE DENMARK

In Denmark the 76 music venues part of Dansk Live are responsible for organising well over 14.000 artist performances per year. The concerts attract 1,5 million visits.

Music venues in Denmark are for 74% private non-profit organisations, which have

mixed business models, based on their audience capacity. Larger venues have a larger share of ticket sales and catering sales, while smaller venues have a larger part of subsidy in their total income. Many volunteers are engaged in the Danish venues (83% of all workers).



76 live music venues

571 average audience capacity (500 median)

8.471 music activities, with 14.271 artist performances

1.540.913 audience visits



5.033 total workers

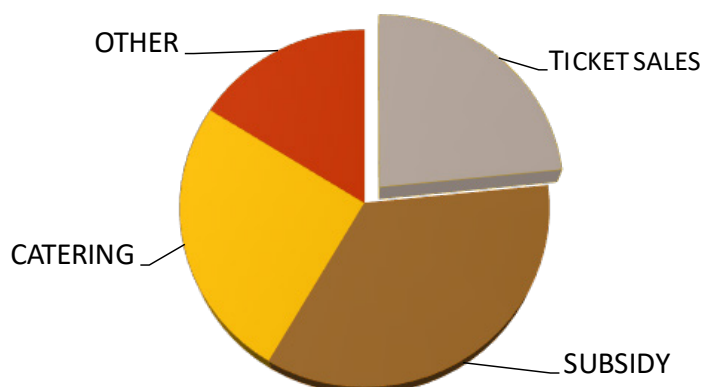
including 721 paid employees (14%)

including 4.200 volunteers (83%)

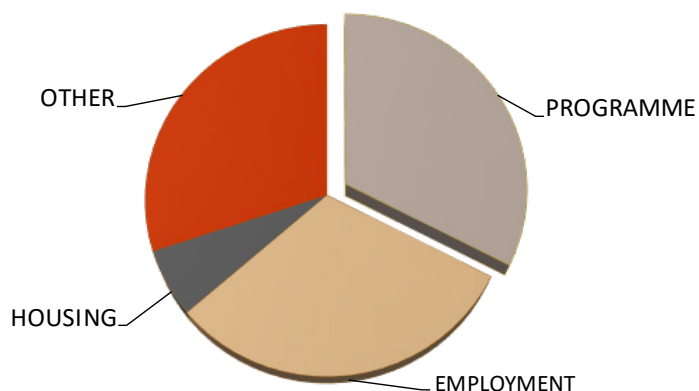


€ 77 - € 79 million income and expenses, 74% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 43 music venues member of Dansk Live in 2016 and extrapolated to 76 music venues as part of Live DMA in May 2017.



FEDELIMA - FRANCE

In France the 144 music venues part of FEDELIMA are responsible for organising almost 23.000 artist performances per year. The concerts attract 2,2 million visits. Next to that, French venue organisations are very active in social and educational activities and artist projects and support. In France volunteers engagement is more

restricted by law than in most other European countries and therefore there are limited possibilities to work with volunteers. For this reasons the employment costs and subsidy level of French venues are relatively high for European average. Almost all the venues are non-profit.



144 live music venues
531 average audience capacity (450 median)
8.289 music activities, with 22.866 artist performances
2.198.791 audience visits

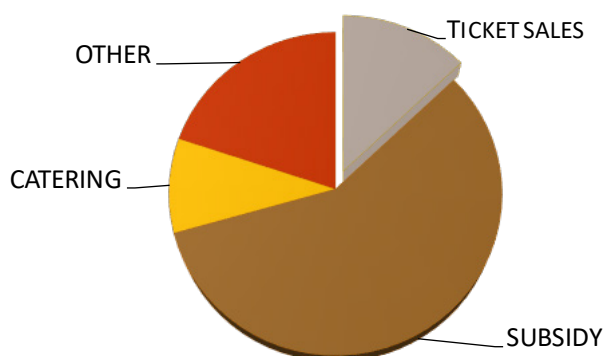


4.352 total workers
including 3.069 paid employees (71%)
including 857 volunteers (20%)

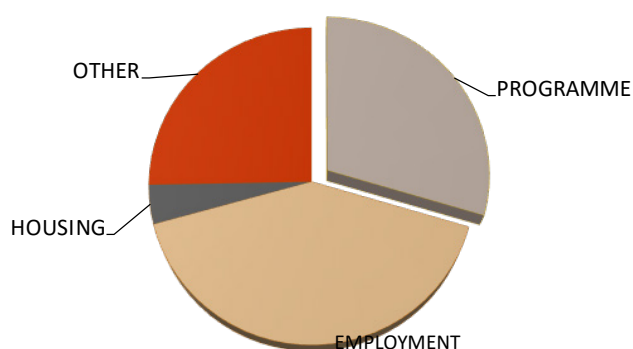


€ 149 million income and expenses, 98% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 105 music venues member of FEDELIMA in 2016 and extrapolated to 144 music venues as part of Live DMA in May 2017.

In Germany the 347 music venues part of Live Komm are responsible for organising over 118.000 artist performances per year. The concerts attract 12,6 million visits. 40% of the venues is non-profit. Volunteers are mainly engaged in the smaller venues (35% of all workers). Due to diverse cultural policies and regulations in different German re-

gions there are many differences between venues business models, but in general in Germany subsidy for music venues is not as common as in other European regions. Recent support for sound regulation lead to a slightly higher share: an average of 8% subsidy of the total income.



347 live music venues
508 average audience capacity (250 median)
62.033 music activities, with 118.416 artist performances
12.618.931 audience visits

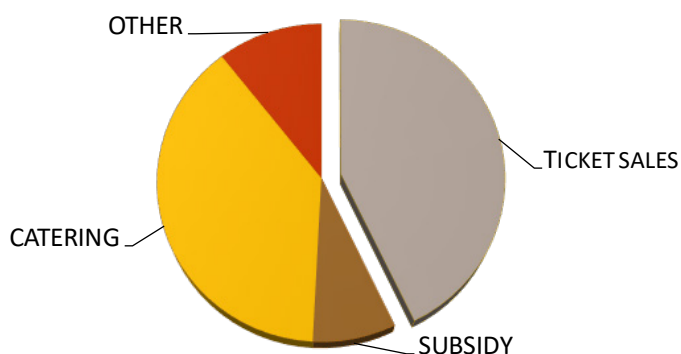


10.921 total workers
including 6.073 paid employees (56%)
including 3.808 volunteers (35%)

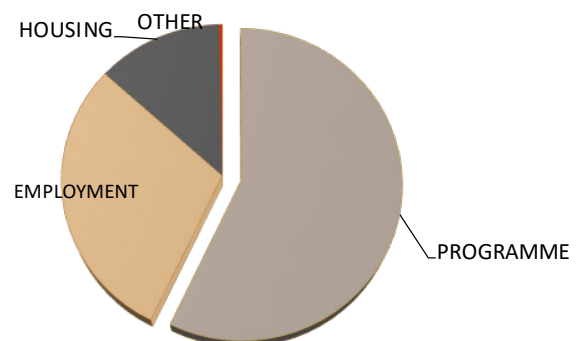


€ 250 - € 283 income and expenses, 40% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 40 music venues member of Live Komm in 2016 and extrapolated to 347 music venues as part of Live DMA in May 2017.

In Switzerland, the 109 music venues part of PETZI are responsible for organising over 21.000 artist performances per year. The concerts attract 1,9 million visits. All venues are non-profit organisations. Most of them

work with volunteers (66% of all workers). There is a mixed finance model with an average of 30% ticket sales, 27% subsidy and 43% other income of total income.



109 live music venues
407 average audience capacity (300 median)
11.135 music activities, with 21.375 artist performances
1.908.372 audience visits

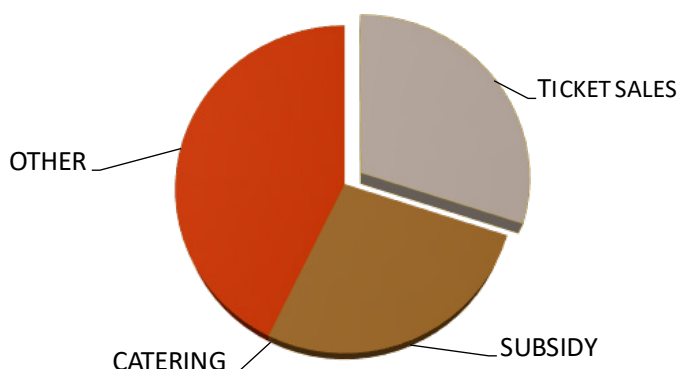


10.017 total workers
including 3.308 paid employees (33%)
including 6.611 volunteers (66%)

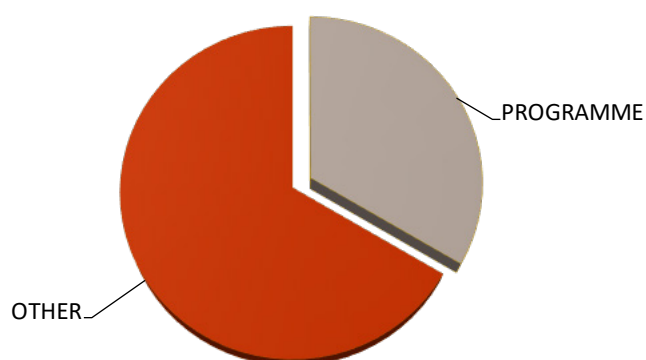


€ 80 - € 82 income and expenses, 100% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 77 music venues member of PETZI in 2016 and extrapolated to 109 music venues as part of Live DMA in May 2017.

In Norway, the 172 music venues part of Norske Konsertarrangører (NKA) are responsible for organising almost 16.000 artist performances per year. The concerts attract well over 2 million visits. Over two third of all venues are non-profit organi-

sations. Volunteers are mainly engaged in smaller music venues (64% of all workers). NKA has just started the survey in Norway, so no financial numbers are available yet, but expected soon.



172 live music venues

494 average audience capacity (300 median)

10.231 music activities, with 15.809 artist performances

2.057.988 audience visits



6.941 total workers

including 2.473 paid employees (36%)

including 4.438 volunteers (64%)



69% non-profit

*based on collected data of 2015 of 63 music venues member of Norske Konsertarrangører in 2016 and extrapolated to 172 music venues as part of Live DMA in May 2017.

THE NETHERLANDS

In the Netherlands, the 56 music venues part of VNPF are responsible for organising over 25.000 artist performances per year. The concerts attract 3,6 million visits. Most smaller and medium sized venues work with volunteers (60% of all workers). Smaller venues have a larger share of subsidy in their total income, but the average for all venues is 31% subsidy, meant mostly to cover em-

ployment and housing costs. The audience generates at least 58% of the income, by ticket and catering sales. The programme costs relate directly to the ticket sales. Since 98% of all venues are non-profit, their goal is to invest all possible means in presenting as many new and diverse music talents as possible.



56 live music venues

952 average audience capacity (600 median)

10.461 music activities, with 25.043 artist performances

3.633.704 audience visits



7.450 total workers

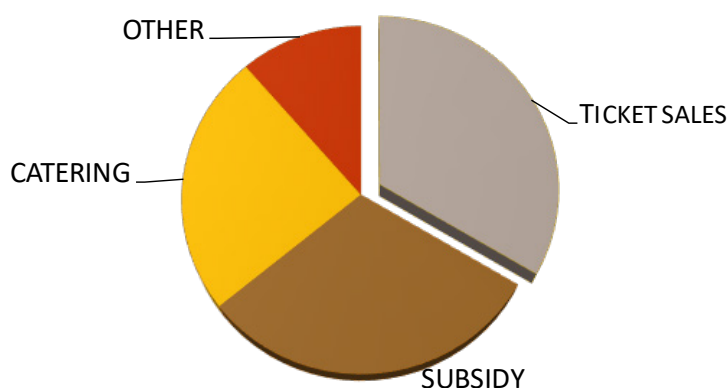
including 2.608 paid employees (35%)

including 4.483 volunteers (60%)

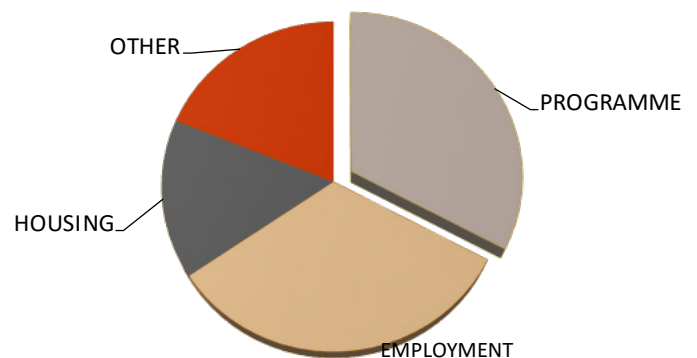


€ 141 million income and expenses, 98% non-profit

INCOME



EXPENSES



*based on collected data of 2015 of 51 music venues member of VNPF in 2016 and extrapolated to 56 music venues as part of Live DMA in May 2017.

ABOUT LIVE DMA & THE SURVEY

Live DMA is a European non-governmental network working to support and to 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 17 members situated in 13 countries. The members are regional and national live music associations that represent more than 2500 music venues and festivals located all over Europe.

In 2017, the European Commission recognized Live DMA as European network and granted, via the Creative Europe program, funding to develop the network's project Live Style Europe. Live Style Europe is a "building capacity program" with the objective to empower music venues, festivals,

and regional and national live music associations and to provide them with skills and tools in order to adapt to the changes of the music sector.

By gathering independent players from the entire live music sector, Live DMA proposes 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 European Alliance for Culture and the Arts, Live DMA is also actively engaging with other European cultural networks in order to make changes in the European approach of culture with the aim to include culture and the arts in the long-term goals of the European project.

DISCLAIMER

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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 also likes 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.

Due to a limited survey response rate in Denmark, Germany, Norway and Spain, the data of these countries/networks are approximate.

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METHODOLOGY

Since 2011, Live DMA collects data to represent the venues on a European level and compares them on different scales. The survey measures:

- CULTURE: audience capacity, music activities, music performances and audience visits
- WORK: paid staff, volunteers, interns and others in persons and full time jobs
- FINANCE: programme costs, employment costs, housing costs, ticket sales, subsidies, food & beverages, total income, total expenses and financial result.

The individual Live DMA members collect the data based on the same questionnaire. Questions and definitions are synchronized for all participating Live DMA members to create useable totals and average numbers.

The survey is repeated every year with the aim to discover trends and developments. Every year more countries and venues participate in the Survey. In 2014, the Survey was addressed to 837 venues, of which 435 responded, representing (a rate of 52%). In 2015, the survey was addressed to 1100 venues 452 responded (a rate of 41%).

The results in this report are based on collected data year 2015 of 452 music venues in 8 different countries extrapolated to 2109 music venues as part of Live DMA in May 2017.

PARTICIPATING ASSOCIATIONS IN THIS SURVEY (REPORT):

- ACCES (Spain, excl. Catalonia and Basque Country)
- ASACC (Catalonia, Spain)
- Club Plasma (Wallonia, Belgium)
- Clubcircuit (Flanders, Belgium)
- Dansk Live (Denmark)
- Fedelima (France)
- Live Komm (Germany)
- Norske Konsertarrangører (Norway)
- PETZI (Switzerland)
- VNPF (Netherlands)

SURVEY QUESTIONNAIRE / DEFINITIONS:

Audience capacity of the music venues includes only the spaces used for music activities, like 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 are for example cultural actions, community work, courses, etc.

Tools & space for musicians of music venues are for example rehearsal studios, recording, studios, resource centre, 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 activity is a public event that is promoted as one programme with a separate entrance fee or free entrance. Music activities can include multiple music performances of acts/bands/DJ's

Paid visits concerns the attendants that pay any form of entrance fee.

Free visits concerns the attendants that pay no form of entrance fee, because the music activity has no entrance fee, or they are invited as guests to music activities with an entrance fee.

Paid employees includes 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 workers who perform or offer to 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 this survey we used a standard workweek 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, sponsorship 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, Europe, etc.

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

Total expenses 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.

Employment 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.

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