



IMPACT OF THE COVID-19 PANDEMIC ON MUSIC VENUES AND CLUBS IN EUROPE

LIVE DMA PUBLICATION - KEY NUMBERS 2020 AND 2021

SUMMARY

Looking at 2020 and 2021 together and comparing to previous years, for the 3,253 music venues part of Live DMA, there are an expected:

ARTISTIC IMPACT

- **78% less live music performances.**
- **1.9 million less artist performances.**
- **Decline of at least € 730 million spent on programming artists.**
- Lower share of international artists performing.
- Emerging artists did not meet new live audiences.
- Decline of venues and clubs' other cultural functions and artistic facilities such as rehearsing rooms or studios.

SOCIAL IMPACT

- **141 million less audience visits.**
- Decline of social and educational activities organised or facilitated by music venues and clubs.
- Much less participation in music venues and clubs for ten thousands of volunteers. Many volunteers left the organisations permanently.

(UN)EMPLOYMENT

- **Thousands of permanent jobs are lost at venues and clubs,** and with that the knowledge and experience of these workers.
- **Million hours of paid work lost for freelancers.**
- Many suppliers (catering, ticketing, marketing, booking agencies) also suffer from financial problems.
- A weaker infrastructure and lack of workers will further slowdown the reopening and recovery of activities and income for music venues and clubs' scenes and artists.

ECONOMICAL IMPACT

- **Decline of 66% of venues and clubs' total income.**
- **Decline of 78% of venues and clubs' own income** (income excluding subsidies).
- **€ 3.1 billion less income.**
- Of which € 1.3 billion less ticket sales and € 1.4 billion less catering sales.
- Less income from sponsorship and private letting.
- Income loss is higher for private commercial and larger private non-profit venues and clubs, which usually have a higher share of own income and lower share of subsidy.

SUMMARY

THE EFFECTS OF PANDEMIC RESTRICTIONS ARE EVEN MORE IMPORTANT IN 2021 THAN 2020

- Our estimated numbers show that the **loss of audience visits and income for venues and clubs will be even higher in 2021 than in 2020**, when compared to the situation before the pandemic.
- Less artists touring and performing abroad in 2021 than in 2020.
- **In 2021 an expected decline of 83% of audience visits**, compared to 77% less visits in 2020.
- **In 2021 an expected decline of 81% of venues and clubs' own income** (income excluding subsidies), comparing to a decline of 75% own income in 2020.

THE LIVE MUSIC SCENE NEEDS A LONG-TERM SUPPORT

- **Many music venues and clubs will have negative financial results in both 2020 and 2021**, especially the private commercial venues and clubs that do not receive subsidies, and larger non-profit venues and clubs with a low share of subsidy. They are depending heavily on audience income.
- **The government limited the venues audiences and income** with COVID-related restrictions. Now the same **governments have a responsibility** to financially support the music venues and clubs to survive on short term and recover on long term.
- **There is a lack of financial support from governments in most countries.** There is not enough support to avoid negative financial results, further loss of jobs, and in worst case the bankruptcy and permanent loss of music venues and clubs.
- **Music venues and clubs need financial support now to survive, and at least until summer 2022 to further recover.**
- **Several support measures by governments, besides subsidies, can be very helpful to venues and clubs** such as: tax decrease, tax delay schemes, loans without interest, rent freeze or discounts, and ticketing refund policies. Moreover, incentive measures in form of grants, bonus, or investment fund to support jobs creation with fair conditions and sustainable practices, are required to support the live music scenes' resilience.
- More support is needed for the whole **ecosystem of live music**, including freelancers, suppliers, and artists, to preserve the live music infrastructure, to avoid further damage to the industry and to support recovery.

INTRODUCTION

The [Live DMA Survey report](#) published in January 2020 shows the **enormous artistic, social and economic importance of live music venues and clubs across Europe**. Until March 2020 there was a thriving live music industry that, when counting only the extrapolated numbers of the 3,253 venues and clubs currently in the Live DMA network, brought us at least **1.2 million artist performances, 87 million audience visits and 2.3 billion euros turnover per year**.

In the report of January 2020 however, the **fragile infrastructure** was also firmly noted. Even in good years before the pandemic, most venues and clubs (of which almost half of them are non-profit structures) already had tight budgets, taking many **financial risks by programming emerging artists**, often depending on volunteer's work, and received not, or very limited, financial support from governments. Most live music venues and clubs, as well as the artists performing there, always have **depended mostly on income generated by audiences**.

When in March 2020 the COVID-19 crisis started, due to government regulations, **most venues and clubs had to close completely for many months**. Since then, venues and clubs could only reopen under very **strict conditions**, limiting their regular audience capacity, opening times and food and beverage sales. Music venues and clubs had to **cancel or reschedule all their music events**. The number of artist performances and audience visits, and therefore the income from ticket and catering sales decreased drastically. Physical distancing restrictions and limited capacity made it financially very difficult, if not impossible for most venues and clubs to organize live music events, while keeping the costs lower than the maximum possible income.

Still many costs remained, such as venues accommodation and personnel costs. Apart from not being able to fulfil their core business and artistic and social objectives, most venues and clubs were confronted with **heavy financial problems**. This situation did not change much until now. For 18 months, only small, mostly seated, concerts and non-musical events were possible, while organizing concerts for larger audiences and club nights was not at all possible.

Many venues and clubs did get some financial support from local and national governments to help cover expenses and keep employees on the payroll. However, for many venues and clubs in many countries, **the support was not enough to maintain all jobs and to avoid negative financial results**, and they still need support for a sustainable recovery.

In October 2021 restrictions finally seem to be loosened in most regions, or disappear at all, but **it will take months (if not years) for the live music sector and the venues and clubs to recover**. On short term there are still few artists performing abroad, because of travel restrictions and because many international tours have already been postponed to 2022. On the long term **it will take time, money and effort before venues and clubs can reach the level of events and audiences of 2019 again**. It may even take longer before venues and clubs can take the same financial risks again of programming the same level of emerging artists as until 2019.

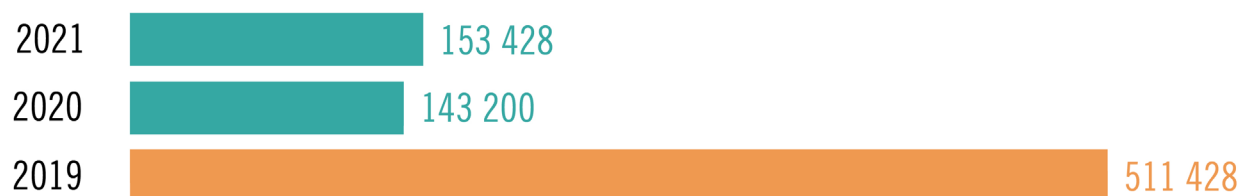
KEY NUMBERS - IMPACT OF THE COVID-19 PANDEMIC ON 3,253 MUSIC VENUES AND CLUBS IN EUROPE IN 2020 AND 2021

The calculated estimations in this publication are based on the extrapolated data 2016 and 2017 (see Live DMA [Survey report](#) published in January 2020) of 3,253 venues and clubs Live DMA represents in 2021 in 17 countries. With additional research on data 2018, 2019 and 2020 of several Live DMA members as well as on pandemic restrictions across Europe, we were able to create realistic calculated estimations of the loss of events, performances, visits, income, and programme costs of the music venues and clubs during 2020 and 2021.

ARTISTIC IMPACT

Looking at 2020 and 2021 together and comparing to previous years, for the 3,253 music venues part of Live DMA, there are an expected:

- **78% less live music performances.**
- **1.9 million less artist performances.**
- **Decline of at least € 730 million spent on programming artists.**
- Lower share of international artists performing.
- Emerging artists did not meet new live audiences.
- Decline of venues and clubs' other cultural functions and artistic facilities such as rehearsing rooms or studios.



TOTAL MUSIC EVENTS



TOTAL ARTIST PERFORMANCES

SOCIAL IMPACT

Looking at 2020 and 2021 together and comparing to previous years, for the 3,253 music venues part of Live DMA, there are an expected:

- **141 million less audience visits.**
- Decline of social and educational activities organised or facilitated by music venues and clubs.
- Much less participation in music venues and clubs for ten thousand of volunteers. Many volunteers left the organisations permanently.



TOTAL AUDIENCE VISITS

(UN)EMPLOYMENT

- **Thousands of permanent jobs are lost at venues and clubs,** and with that the knowledge and experience of these workers.
- **Million hours of paid work lost for freelancers.**
- Many suppliers (catering, ticketing, marketing, booking agencies) also suffer from financial problems.
- A weaker infrastructure and lack of workers will further slowdown the reopening and recovery of activities and income for music venues and clubs' scenes and artists.

Until 2019, the 3,253 venues and clubs provided paid jobs to 30,000 people, excluding performing artists. In addition, 56,000 volunteers were participating in the venues. In our publication of September 2020, we already warned for the disappearance of workers, experience, and knowledge from the live music sector during the pandemic. One year later, fear became reality. **Government support was insufficient for most music venues to keep all their employees on the payroll,** and there was hardly any work available for hired personnel and volunteers that mostly work during events, such as sound and light technicians, security, and catering workers. **Many found work in other sectors, either by choice or because they did not have the choice. It will be a struggle for venues and clubs to find enough workers for all events when fully reopening, and this problem could further slowdown the recovery of events and income for venues and clubs during 2022.**

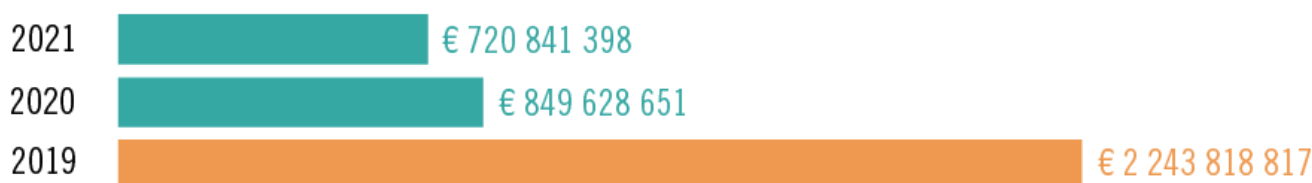
Less income for performing artists was also very evident. There was an estimated decline of 71% decline of programme costs for venues and clubs in 2020 and 2021 comparing to previous years. For the 3,253 Live DMA venues and clubs alone, this means at least 730 million euro less programme costs since the start of the pandemic, of which an estimated 50-60% are artist fees.

ECONOMICAL IMPACT

Looking at 2020 and 2021 together and comparing to previous years, for the 3,253 music venues part of Live DMA, there are an expected:

- **66% decline of total income.**
- **Loss of income of € 3.1 billion**, which consists of an estimated:
 - **€ 1.3 billion** less income from ticket sales
 - **€ 1.4 billion** less income from food & beverages sales
 - **€ 380 million** less other income
- Less income from sponsorship and private letting.

In 2020 and 2021 there was only **34%** of the venues and clubs' total income left (a 66% decline) comparing to previous years. This still includes the regular subsidies for part of the venues and clubs. This excludes additional COVID-related support measures.



TOTAL INCOME (including subsidies)

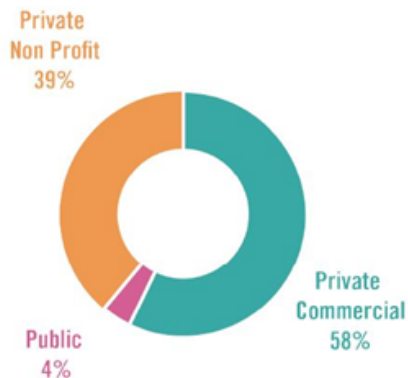
FINANCIAL DAMAGE

The financial damage, taking in account both the impact on income and expenditure, differs for the different types of venues and clubs, but also for the different regions.

The loss of income is related to the venues and clubs' **audience capacity, legal status, and business model.**

Subsidies are an important indicator. Private commercial organisations and many larger non-profit organisations have none or only a very low share of subsidy and depend almost exclusively on audience income. Therefore, these type of venues and clubs lost the most income and faced the largest financial damage.

- **58% of all Live DMA music venues and clubs have a private commercial structure.** For this type of organisation, the financial damage is extreme. These types of venues and clubs lost almost 100% of their total income, because it consists almost solely of income generated by their audiences (tickets, beverage, food, etc.). Without this income source, the well over 1,800 private venues and clubs that are part of the Live DMA network cannot fulfil their financial obligations. **They fully rely on their own reserves, cutbacks, and financial support from governments to survive.**



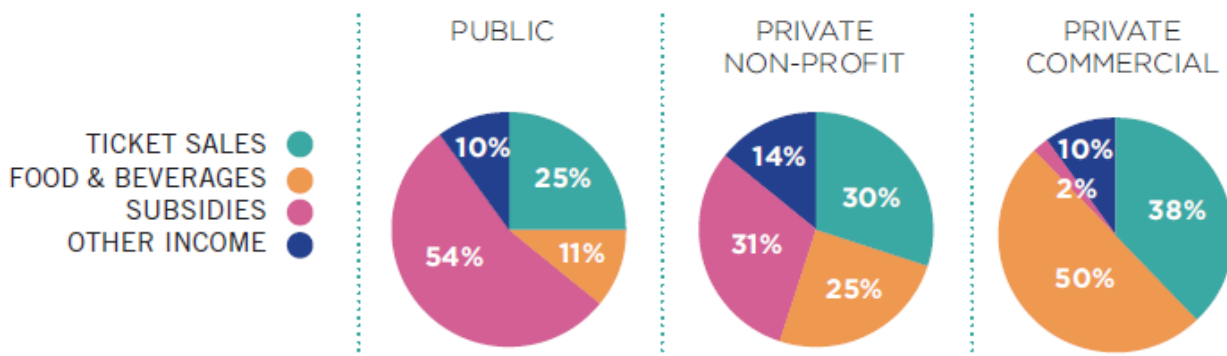
LEGAL STATUS OF VENUES PART LIVE DMA

Although many private venues and clubs need government support the most, it is often more difficult for them to communicate with governments and get the necessary support and recognition for their cultural value, than it is for non-profit venues who already have a financial relationship and dialogue with the governments.

- **39% of Live DMA music venues and clubs have a private non-profit structure.** We observe that not all their income disappeared because they often still received subsidies in 2020. Subsidies can be an important share (31% average) of their total income. This can cover part of their fixed expenses, such as housing costs (9% of total expenses) and employment costs (34% of total expenses).

Larger private non-profit venues and clubs tend to have a lower share of subsidy (sometimes less than 10%). Their loss of income and deficits are still threatening. Most of these venues and clubs are not able to cover all their expenses anymore, and have to rely on their own reserves, cutbacks and financial support from governments to survive.

- **4% of Live DMA music venues and clubs have a public non-profit structure.** We suppose that the financial damage is relative as subsidies cover an important share (54% average) of their total income. This makes it easier to cover housing costs (9% of total expenses), personnel costs (37% of total expenses) and other expenses. Additional financial support is more likely for public venues (partly owned or run by local governments).



SHARE OF INCOME PER LEGAL STATUS

If we look at the loss of the venues' **own income** (income excluding subsidies) in 2020 and 2021, it gives a better view on the effect for music venues that do not have regular subsidies, and for which (almost) 100% of their income is own income.

Looking at 2020 and 2021 together and comparing to previous years, for the 3,253 music venues part of Live DMA, there is an expected **78% decline of venues and clubs' own income** (income excluding subsidies).



OWN INCOME (income excluding subsidies)

We would like to emphasize on the fact that above numbers are averages, and do not give information about the situation of any individual music venue or club.

The loss of expenses is among others related to the type of workers different venues employ. Venues and clubs with a high share of freelancers will have less employment costs left during the pandemic than venues and clubs with mostly permanent workers on their own payroll.

The venues and clubs' final financial result of 2020 and 2021 partly depends on the amount of financial support from governments. Also, relief measures such as ticketing refund schemes, tax payment delays, or loaning options are important for venues liquidity position, and, thus, essential for their survival.

The effects of pandemic restrictions are even more important in 2021 than 2020

- Our estimated numbers show that the loss of audience visits and income for venues and clubs will be even higher in 2021 than in 2020, when compared to the situation before the pandemic.
- Less artists touring and performing abroad in 2021 than in 2020.
- In 2021 an expected decline of 83% of audience visits, compared to 77% less visits in 2020.
- In 2021 an expected decline of 81% of venues and clubs' own income (income excluding subsidies), comparing to a decline of 75% own income in 2020.

The live music scene is in need for long-term support

In the best case there are **no COVID-related restrictions for music venues anymore in the last 8-12 weeks of 2021**, similar to the first 8-12 weeks of 2020, but there will be a big difference between these periods. In the next 3 to 6 months there will be just a small part of artists performing abroad than usual. International tours take time to set up and sell out. **The infrastructure of the live music sector is damaged. There is less money available to invest and take risks. Audiences must find their way back to the music venues and clubs.**

Since live music venues and clubs are part of a larger ecosystem in the live music industry and cultural sector, the closing down of the music scenes during the pandemic has also affected the whole music chain on an artistic, social, and economic level.

Freelancers and suppliers did hardly get work or orders from music venues and clubs anymore since March 2020 and therefore see their business collapse. This can range from a freelance sound technician to smaller and larger companies providing for example ticketing software or catering services. The effect on the performing artists and their teams is especially dramatic. The venues and clubs normally provide them a place to perform, connect with their audiences and generate income. The numbers of the music venues and clubs show the decline of possibilities, work and income, and this affects the whole ecosystem of the live music industry.

At this moment there is a lack of paid employees, freelancers, and volunteers to organize events. Artists must set up new international tours. Audiences need to find their way back to the venues. Venues need to be able to offer a safe space and proper live experience for the public. Even with an optimistic perspective, it will take at least until summer 2022 for venues and clubs to resume their regular activity and recover their regular income. Until that financial support measures from governments are vital.

- Many music venues and clubs will have negative financial results in both 2020 and 2021, especially the private commercial venues and clubs that do not receive subsidies, and larger non-profit venues and clubs with a low share of subsidy. They are depending heavily on audience income.
- The government limited the venues audiences and income with COVID-related restrictions. Now the same governments have a responsibility to financially support the music venues and clubs to survive on short term and recover on long term.
- There is a lack of financial support from governments in most countries. There is not enough support to avoid negative financial results, further loss of jobs, and in worst case the bankruptcy and permanent loss of music venues and clubs.
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- More support is needed for the whole ecosystem of live music, including freelancers, suppliers, and artists, to preserve the live music infrastructure, to avoid further damage to the industry and to support recovery.

Calculated estimations are based on the data (2016 and 2017) of 604 music venues part of Live DMA, collected during 2018 and 2019, and extrapolated to data of 3253 music venues part of Live DMA in 2021.

For more facts & figures on live music venues & clubs in Europe:
[The Survey - Publication January 2020](#)

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