



LIVE DMA SURVEY 2015

LINKING INITIATIVES AND VENUES IN EUROPE AND DEVELOPING MUSICAL ACTIONS



OUR VALUES

LINKING INITIATIVES AND VENUES IN EUROPE - DEVELOPING MUSICAL ACTIONS

LIVE DMA is a European network for music venues and festivals which believes that popular and alternative music venues and festivals contribute to the development of our societies.

LIVE DMA is a work-in-progress process. We want to be active, to defend collectively the importance of live & practices music venues acting in the general interest along with public policies deals.

We and the venues we represent, are deeply involved in the active sustain of artistic discovery, emergence and innovation, then working for cultural diversity and social impacts of the venues.

The venues and festivals are major contributors to the dynamic of artistic renewal on local, regional, national or international scales.

www.live-dma.eu

DIVERSITY SOCIAL MIXED IMPACT ART
EXCHANGE DEVELOPMENT
JISNW TALENT **LIVE**
NON-PROFIT ECONOMY

- SPAIN -



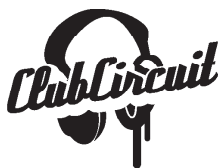
- BELGIUM (WL) -



- DENMARK -



- BELGIUM (FL) -



- FRANCE -



- NETHERLANDS -



- NORWAY -



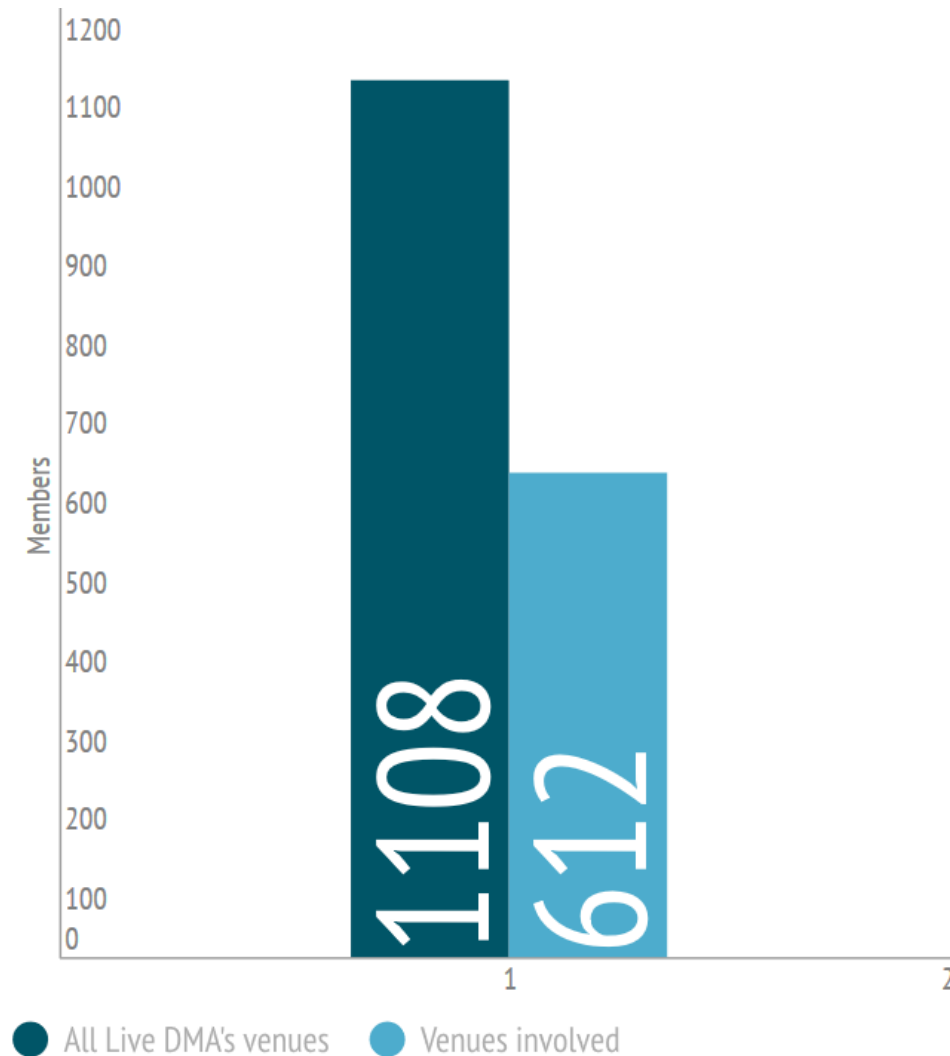
CAUTION!

This survey presents and analyses the data collected in 2013. Until now, it only concerns the venues and not the festivals. However, many venues also organise their own festivals and do not necessarily separate their results for the collect.

The collecting capacity between the organisations is unequal. Some representative organisations have been using data collects for many years to gather information in their country by having survey experts in their teams, appropriate collecting tools and venues members who are familiar with the process. However, other countries and representative organisations are beginning with the Survey method and their members can be reluctant regarding the use of the data they communicate. The Survey needs time to establish trust among Live DMA members, although the use of the data is anonymous.

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ABOUT THE STUDY



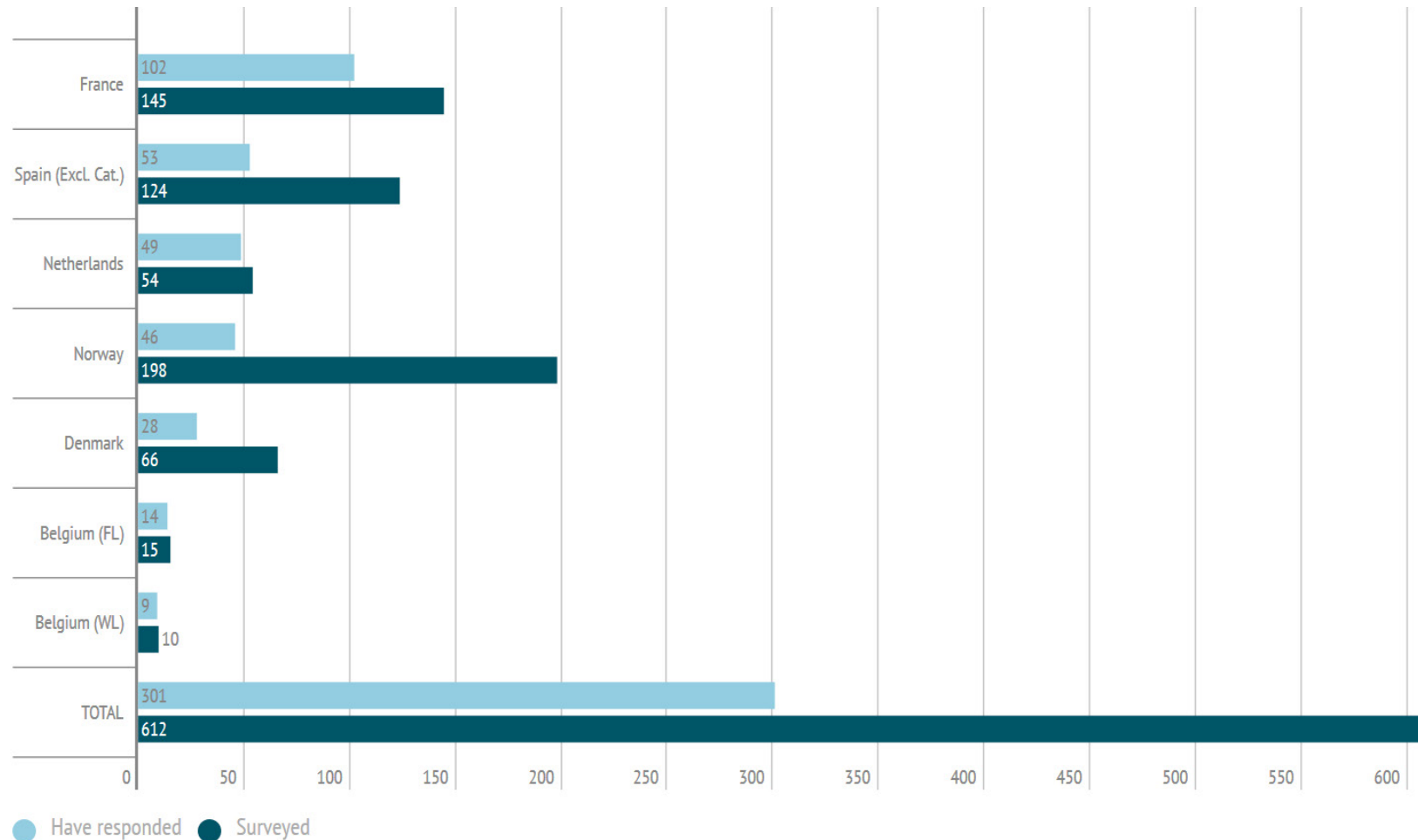
Since 2011, Live DMA has been collecting data to represent the venues on a European level and compare them on different scales. The survey measures the venues activities and visits, employment and finances. This process will be repeated every year so we can draw trends and development out. Live DMA gathers more than 1100 music venues in 8 European countries, through 10 representative organisations.

For the Survey, 6 countries participated in the collect, so that involved 612 venues with an answers rate of 49%.

- ACCES (Spain - excl. Catalonia)
- Club Circuit (Belgium - WL)
- Club Plasma (Belgium - FL)
- Dansk Live (Denmark)
- FEDELIMA (France)
- Norske Konsertarrangører (Norway)
- VNPF (Netherlands)

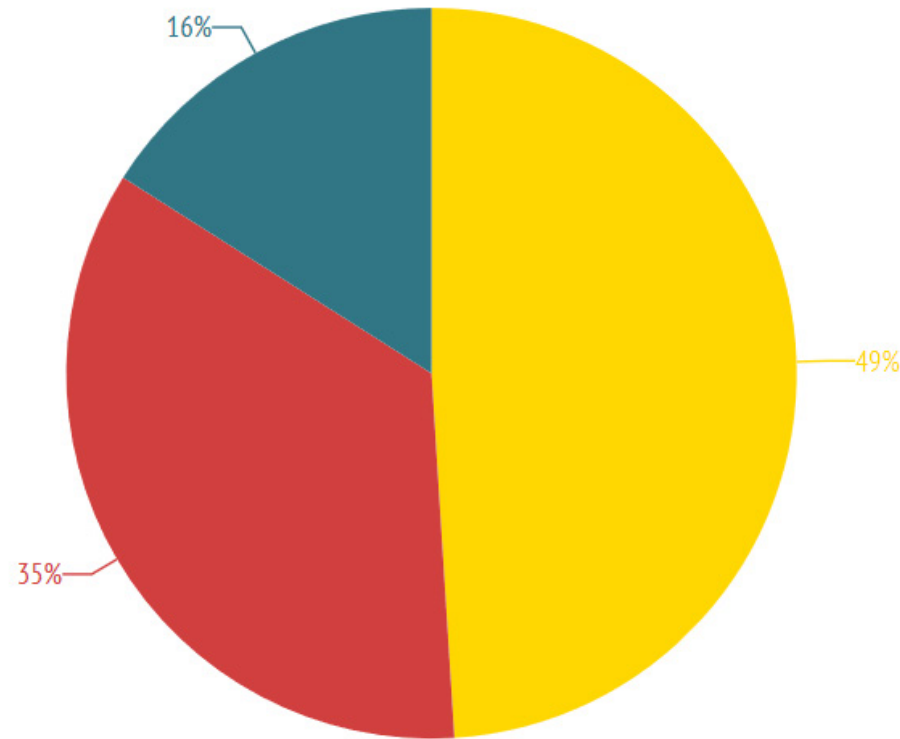
All the participating organisations have named a survey coordinator in their teams. These coordinators meet twice a year to discuss about their main issues and share the decisions which shape the survey each year.

612 venues surveyed - 301 responses



① 612 venues (total sample of the survey) have been surveyed for 2013.
301 venues responded (participation rate: 49%).

VENUES CAPACITIES



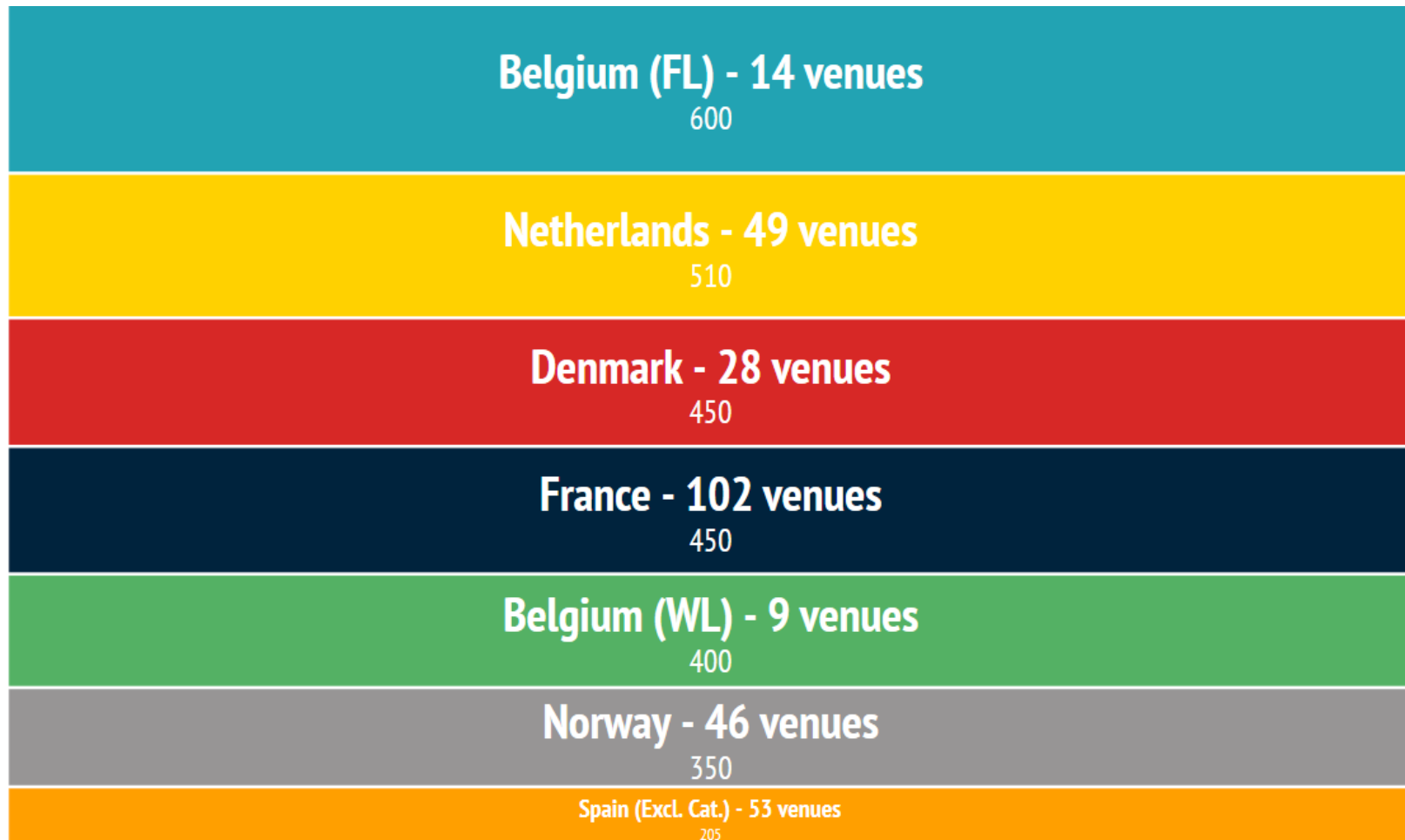
Live DMA represents mostly small and medium sized music venues. Almost half of the venues featured in this study range in size from 50 capacity to 400.

These small and medium sized venues are very important in the music sector because this is where upcoming artists start their careers. They are stages for musical expression and diversity, working with both amateurs or professional musicians. A diversified artistic circulation is only possible with the existence of these small and medium sized venues & festivals.

● Capacity < 400 ● 400 < Capacity < 999 ● Capacity > 1000

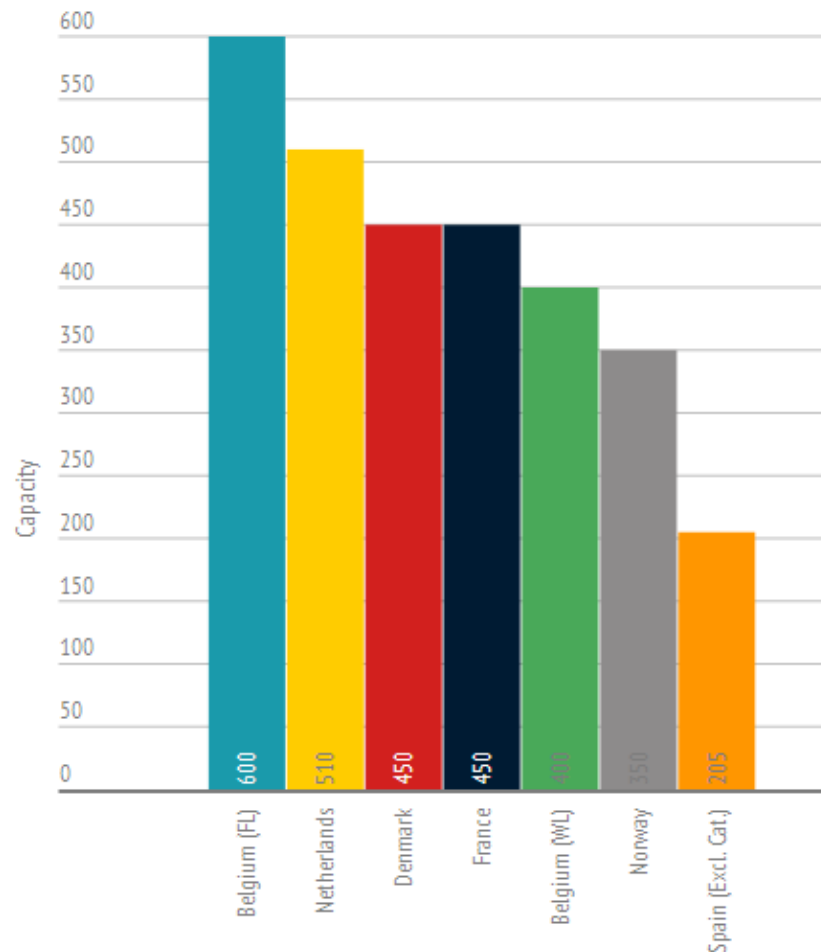
① The “maximum audience capacity” of a venue represents all the halls added up that can be used simultaneously (for example, main hall + club +...), on account of which the whole concert venue can be seen as sold out.

MEDIAN CAPACITIES OF THE VENUES



① In Belgium, among 14 venues, the median capacity of the venues is 600. The median is the number separating the higher half of a data sample from the lower half, which means that 7 venues have a capacity bigger than 600 and 7 venues have a capacity smaller than 600.

MEDIAN CAPACITY OF THE VENUES

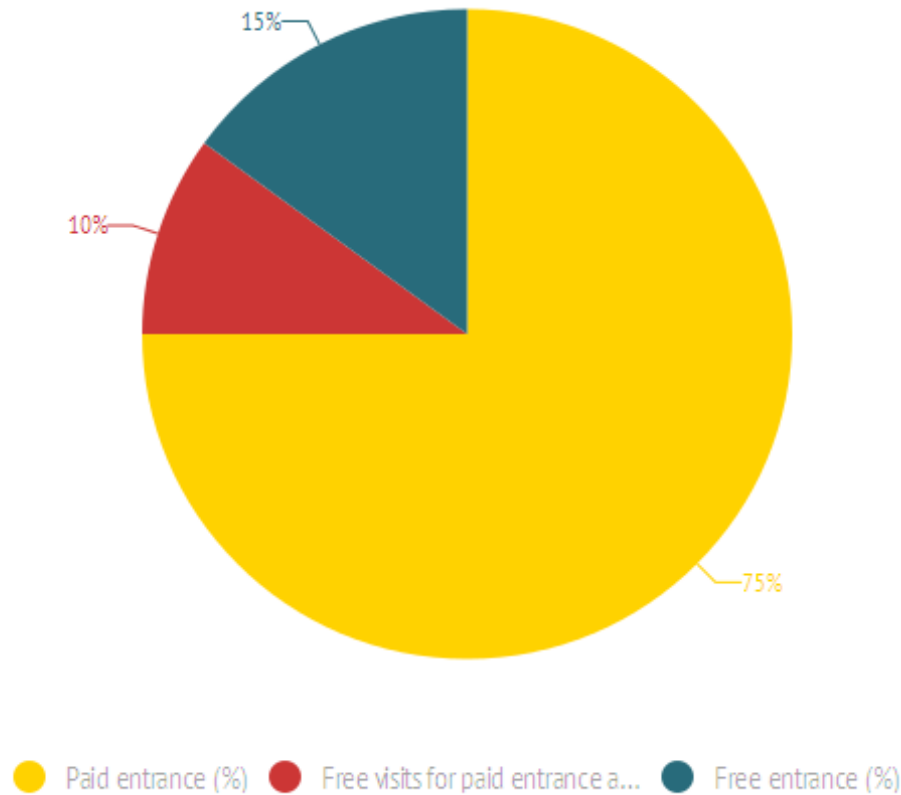


| | Median capacity | Average capacity | Minimum capacity | Maximum capacity |
|-------------|-----------------|------------------|------------------|------------------|
| Belgium FL | 600 | 793 | 200 | 1750 |
| Netherlands | 510 | 763 | 150 | 3600 |
| Denmark | 450 | 887 | 120 | 8850 |
| France | 450 | 522 | 50 | 1999 |
| Belgium WL | 400 | 700 | 200 | 2500 |
| Norway | 350 | 548 | 70 | 3450 |
| Spain | 205 | 347 | 50 | 3370 |

The median is the number separating the higher half of a data sample from the lower half. When the average is higher than the median, it means that there are a very few venues with a big capacity, pulling the number up. There is a big diversity in the venues size. Capacity ranges from small (50 persons minimum) to exceptionally big venues with multiple halls (8850 persons maximum).

- ② In Belgium (FL) the median capacity of the venues is 600. The median is the number separating the higher half of a data sample from the lower half, which means that there is as many venues bigger than 600 capacity in Belgium FL, as venues smaller than 600 capacity.

MUSIC AUDIENCE



The music venues included in this survey are also social places where people can meet and enjoy free time in a safe area all year long. They are set so they can be easily identified and be part of the population's customs.

Average visitors per venue per year: 22998

Average visitors per concert: 200



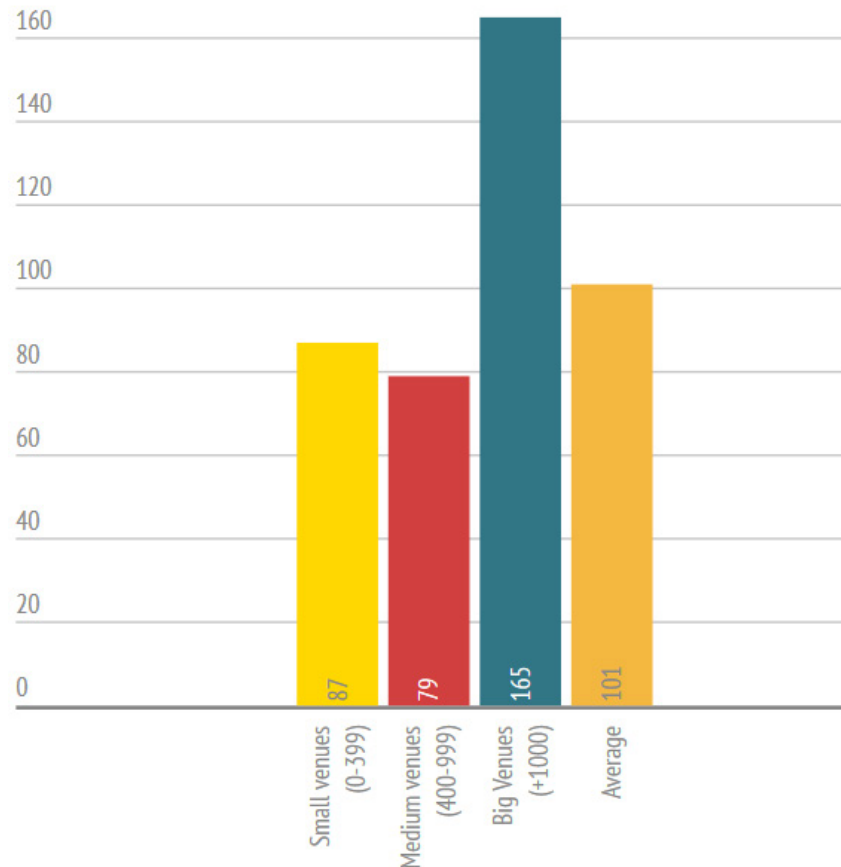
Paid entrance (75%): Concerns the audience that pay an entrance fee

Free entrance (15%): Concerns the audience that attend a free-admission activity

Free visits for paid entrance activity (10%): Concerns the audience that attend a paid activity for free (guest list; press etc.)

MUSIC ACTIVITIES PER VENUE

SORTED BY CAPACITY RANGE



Activities in the music venues range from purely music programme (concerts and club nights) to additional activities like education, cinema, theatre, rehearsal rooms, cafe/restaurants, which are not yet included this survey.

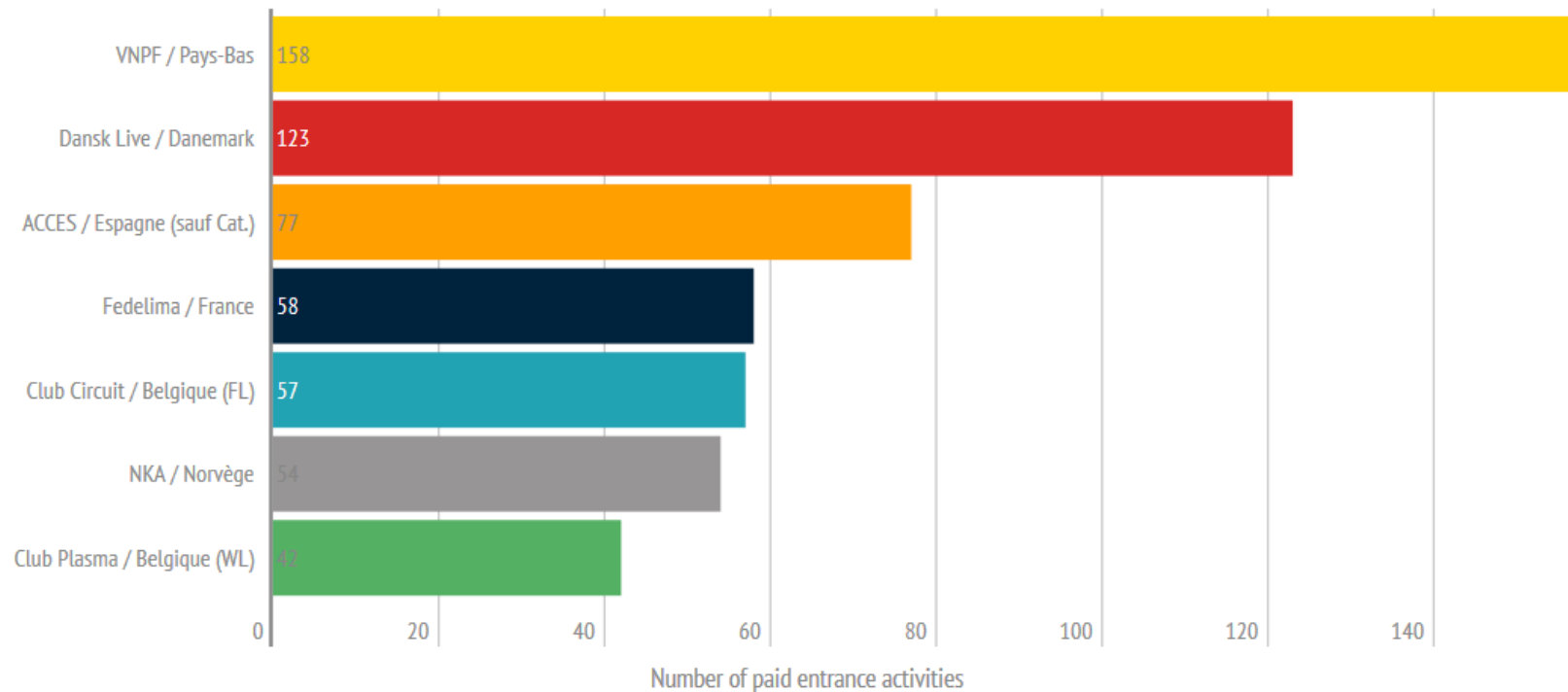
- Average music activities per venue: 101
(the biggest venue organizes 968 activities each year)

- Average artist performances per venue: 219

⓪ An activity is being defined as a public accessible program that has a separate entrance fee. For example, a concert night with a support act is one activity with two performances, accessible with one ticket.

MUSIC ACTIVITIES PER VENUE (paid entrance)

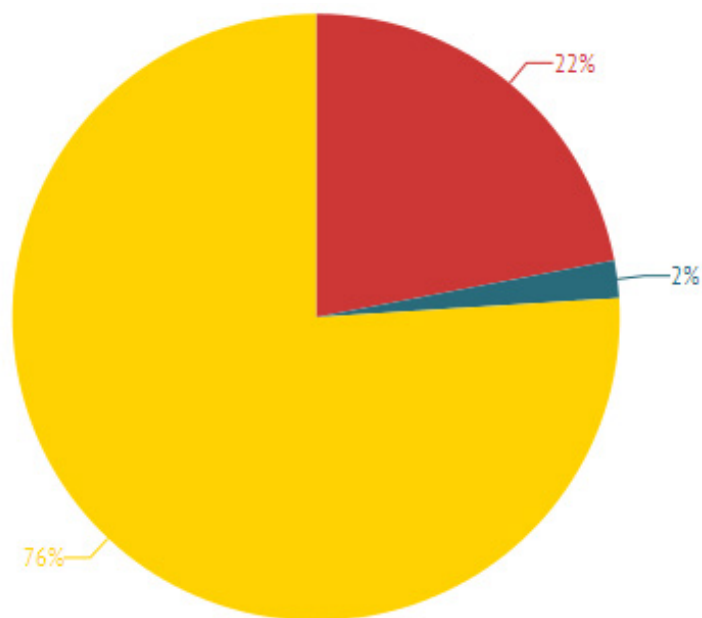
SORTED BY COUNTRY



① The average number of music activities per venues (for each network) has a big difference, partly caused by differences in average venue capacities.

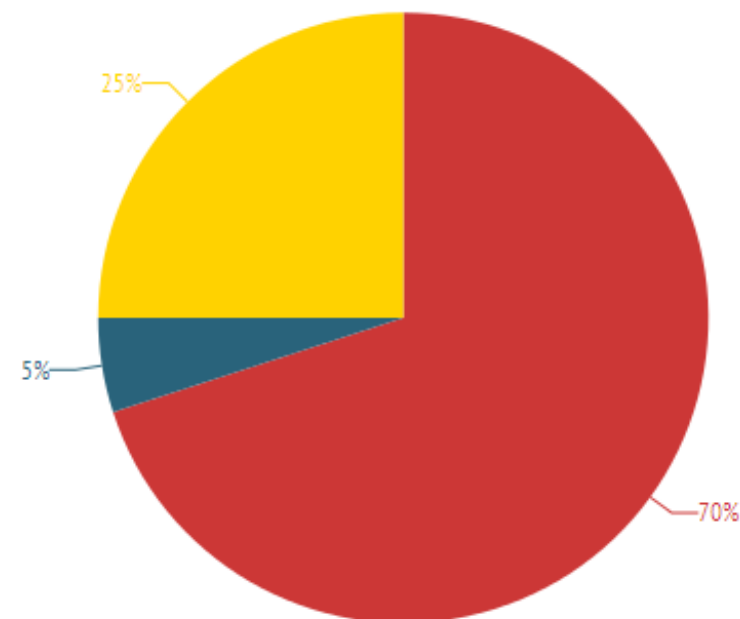
EMPLOYMENT

Employment – Live DMA's members



● Paid Persons (%) ● Others (%) ● Volunteers (%)

Employment FTE – Live DMA's members

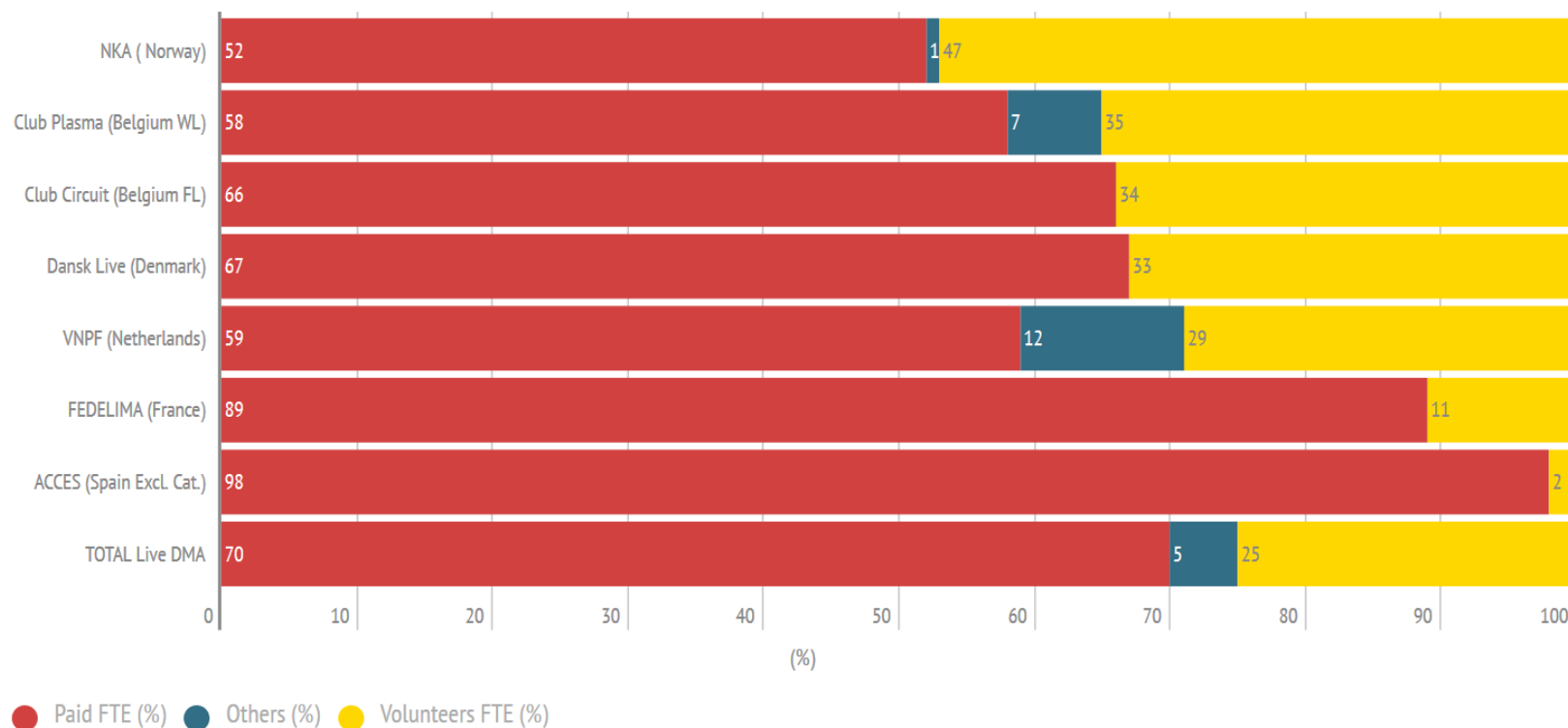


● Paid FTE (%) ● Others (%) ● Volunteers FTE (%)

- ① Paid persons: Includes all paid employees, including on payroll, hired staff, subsidised employees, freelancers, etc.
FTE: Stands for Full Time Equivalent. A staff member with a workweek of 40 hours equals 1,0 FTE ($40/40=1,0$). A staff member with a work of 32 hours equals 0,8 FTE ($32/40=0,8$).
Others: Mainly includes interns or trainees who are neither consider as paid persons nor as volunteers.

EMPLOYMENT FTE

SORTED BY COUNTRY

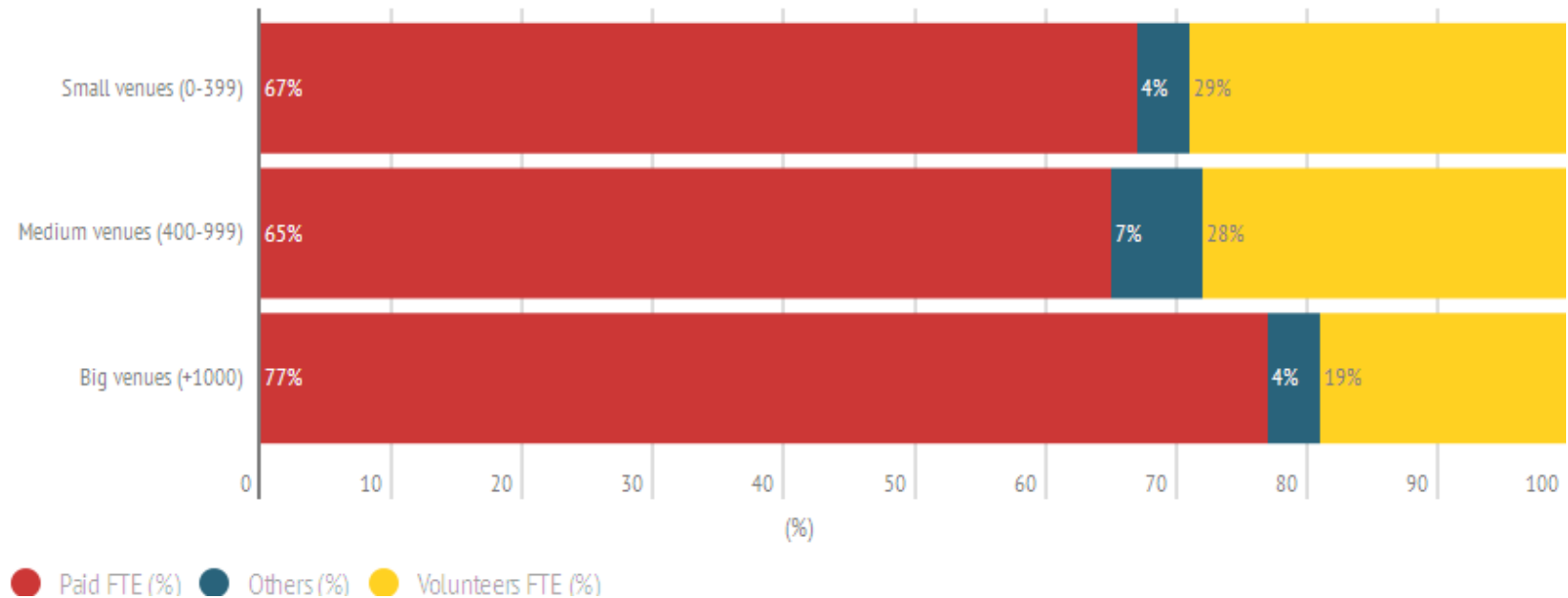


Volunteer's activity depends on the different legislations, on the venues' management and on the cultural habits in Europe. In several countries, voluntary work is strictly supervised.

⓪ In total, among Live DMA's network, 70% of FTE employees are paid, and 5% are considered as "others" (mainly interns or trainees)

EMPLOYMENT FTE

SORTED BY RANGE CAPACITY

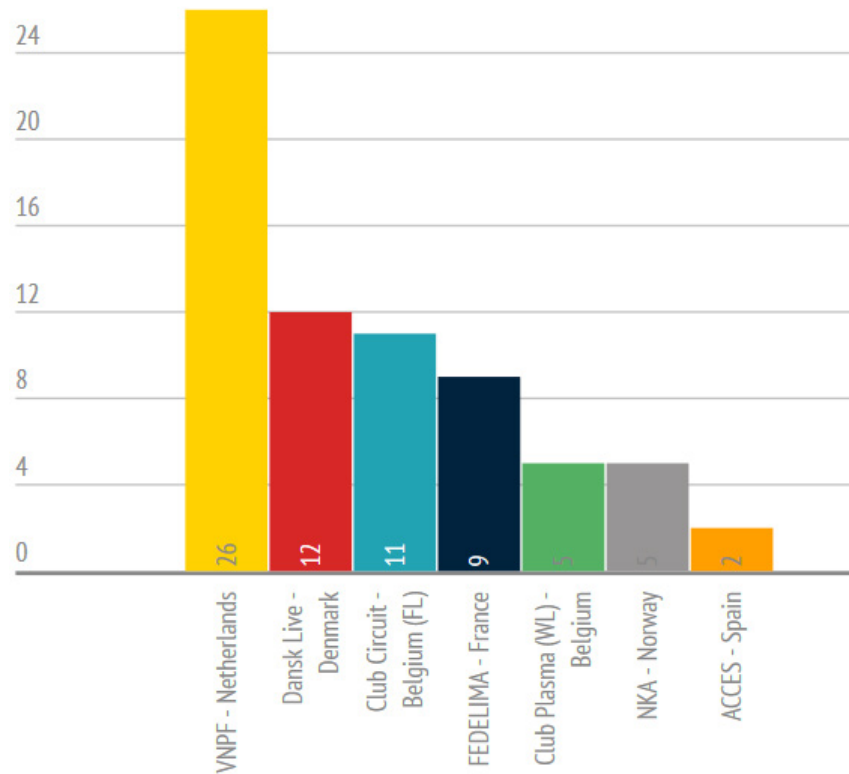


? In small venues (0-399), 67% people working in the venues are paid employees, 29% are volunteers and 4% are others.

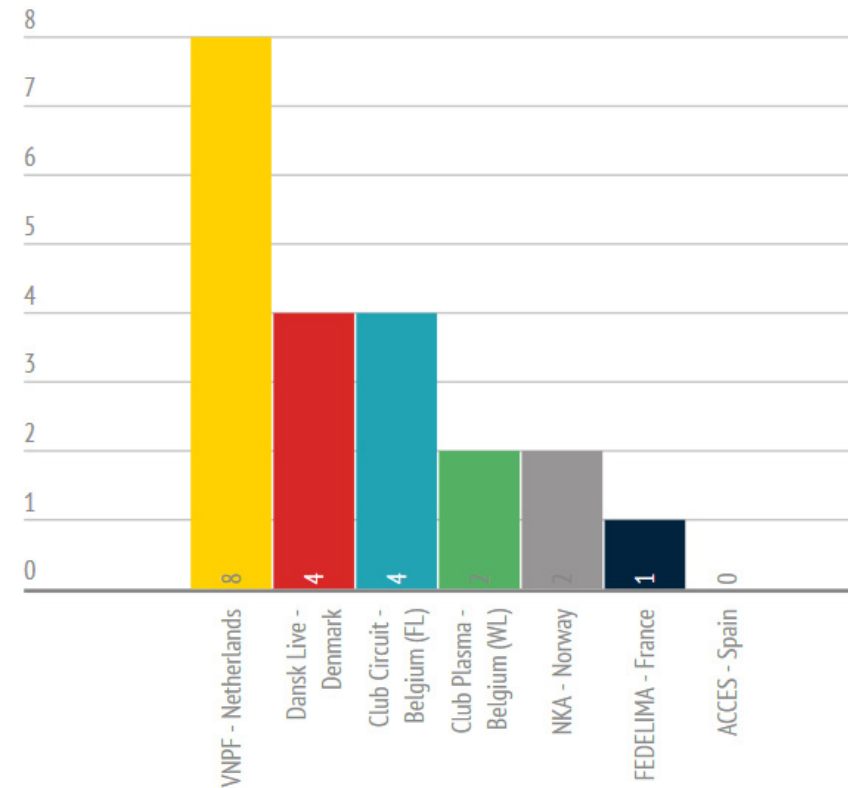
FTE EMPLOYEES / FTE VOLUNTEERS

SORTED BY COUNTRY

FTE EMPLOYEES PER VENUE

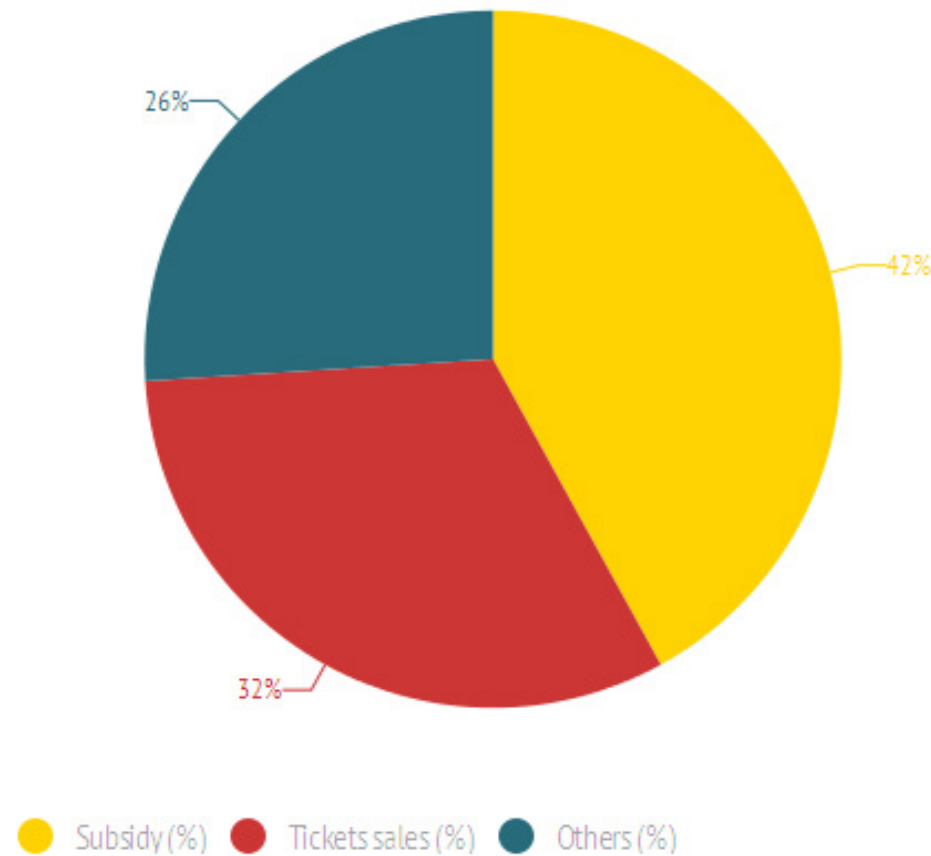


FTE VOLUNTEERS PER VENUE



⓪ After converting the previous percentages into whole numbers, a big diversity appears in the average number of FTE employees according to each venues, ranging from 26 persons (VNPF - Netherlands) to 2 persons (ACCES - Spain).

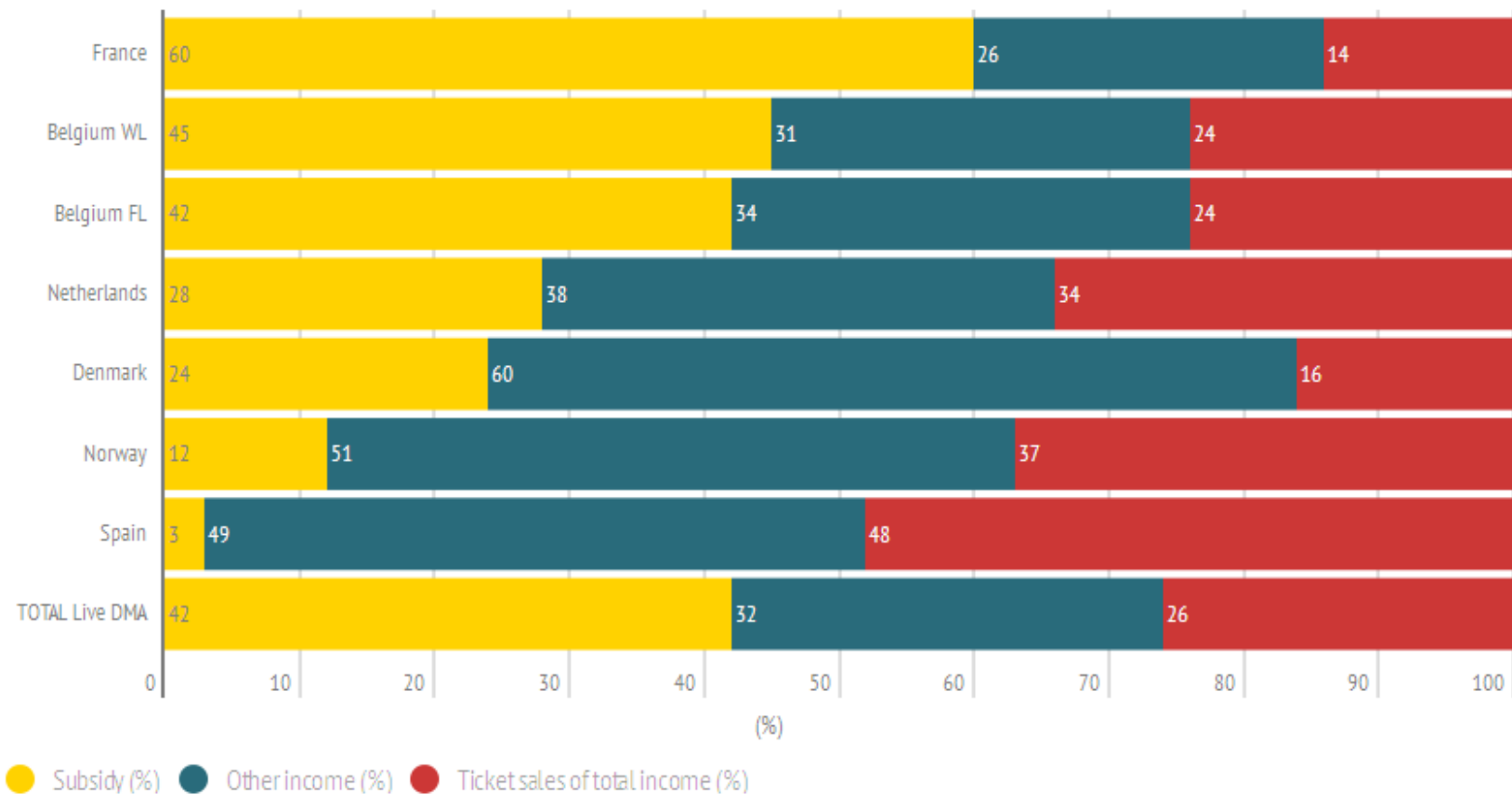
INCOME - Live DMA's members



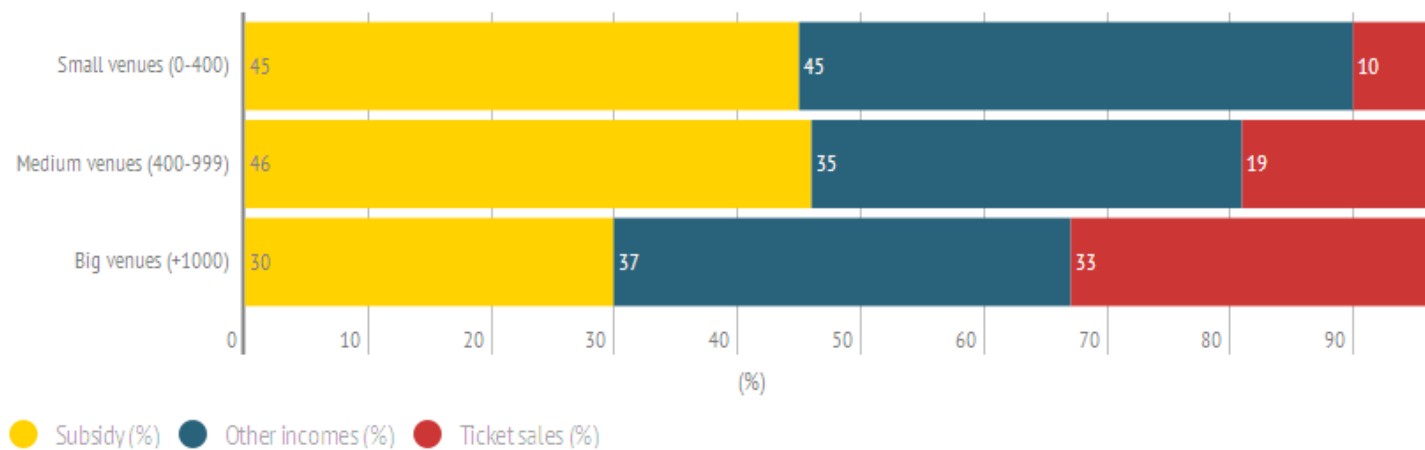
- ① On average, Live DMA's members total incomes are shared between subsidies (42%), tickets sales (32%) and other incomes (26%).
Others incomes: can include bar and catering, but also sponsorship and rentals.
Ticket sales: Do not include other and indirect programme-related revenues (such as cloakroom fees or merchandising). These revenues are also considered as "other incomes".

INCOME - Per venue

SORTED BY COUNTRY



INCOME - Per range capacity

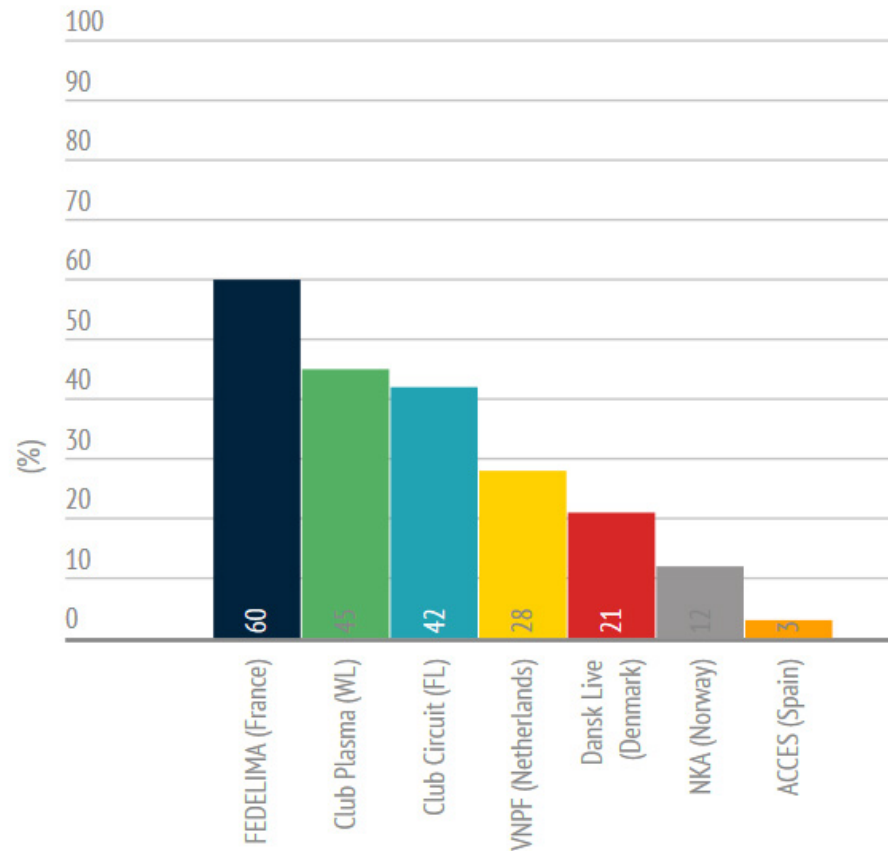


The bigger the venue, the higher the ticket sales as part of the total income (1/3 of the total income for the venues over 1000 capacity).

① An activity is being defined as a public accessible programme that has a separate entrance fee. For example a concert night with a support act is one activity with two performances, accessible with one ticket.

SUBSIDY OF TOTAL INCOME PER VENUE (%)

SORTED BY COUNTRY

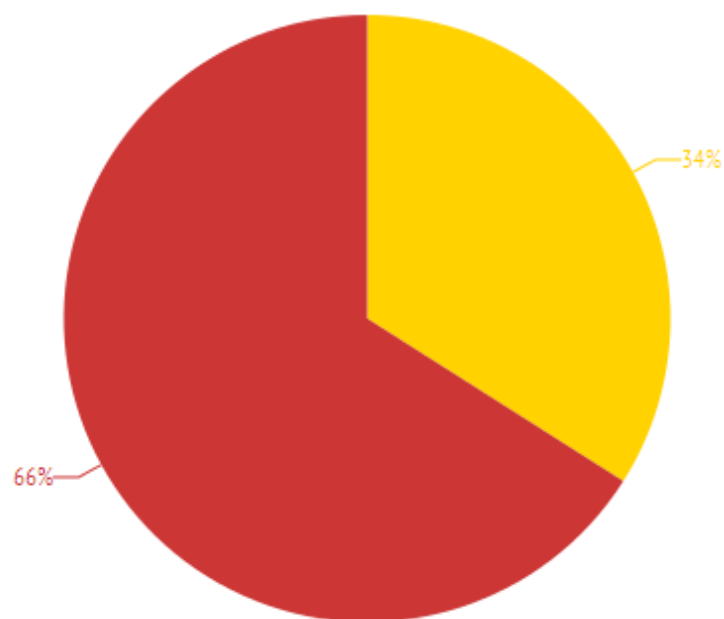


The proportion of subsidy varies depending on the cultural policies of governments per region or country.

The management of the venues are very diverse ranging from totally private to public venues.

The amount of subsidy also varies according to the kind and the diversity of activities that the venues offer. Indeed, subsidies are not necessarily dedicated to purely artistic programmes but can also be granted as part of subsidised jobs sometimes devoted to educational activities.

PART OF THE DIRECT PROGRAMME COSTS IN THE TOTAL EXPENSES



● % Direct programme costs ● % Other expenses

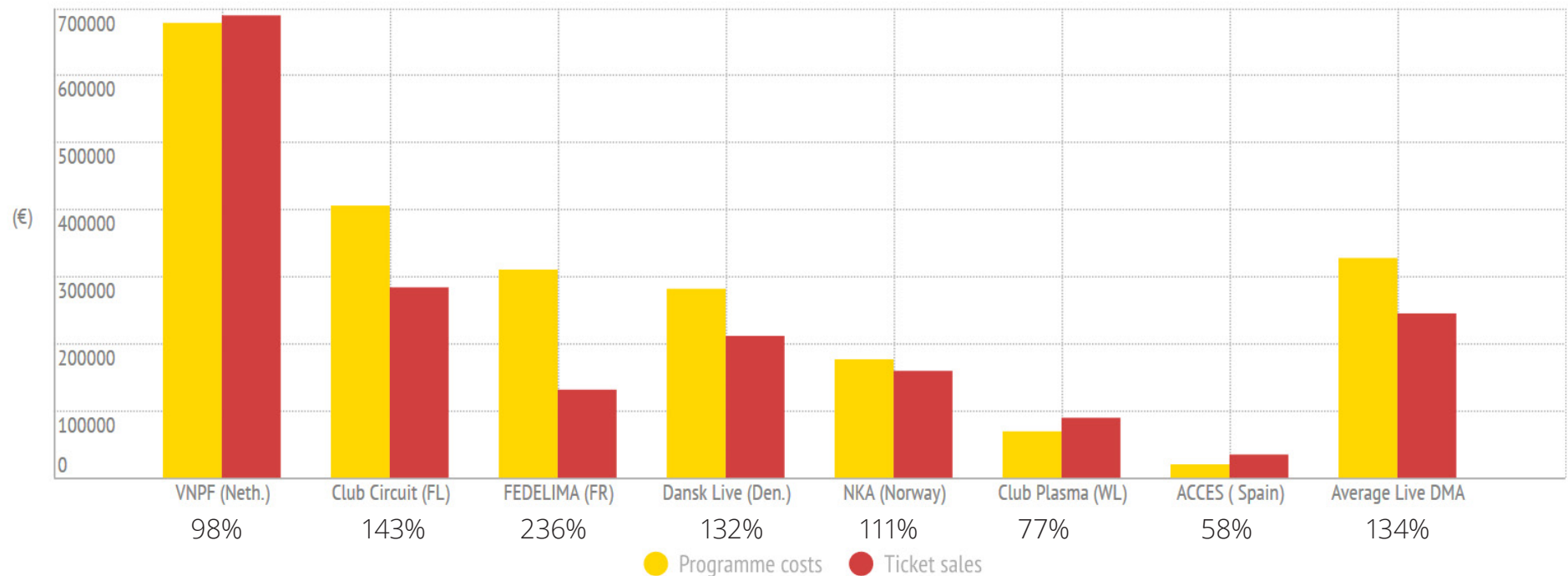
Direct programme costs represent approximately one third (34%) of Live DMA's venues' total expenses.

They are considered as all programme costs directly related to artists, such as wages, copyright organisations rights, artists catering, sets, accommodation and booking fees. Advertising costs are not included.

① An activity is being defined as a public accessible program that has a separate entrance fee. For example a concert night with a support act is one activity with two performances, accessible with one ticket.

PROGRAMME COSTS / TICKET INCOME

SORTED BY COUNTRY



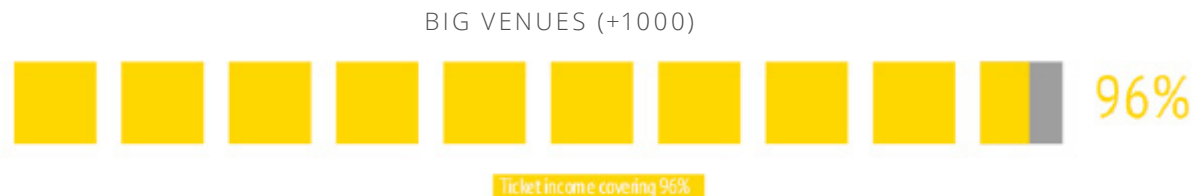
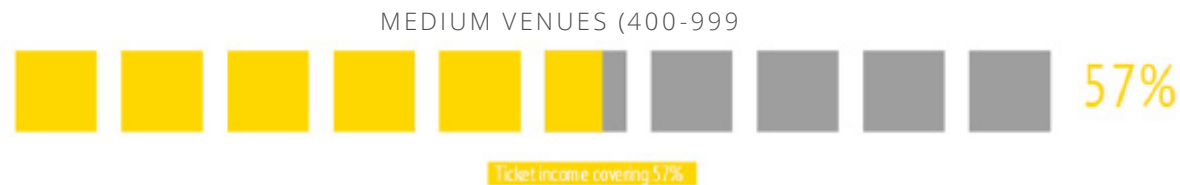
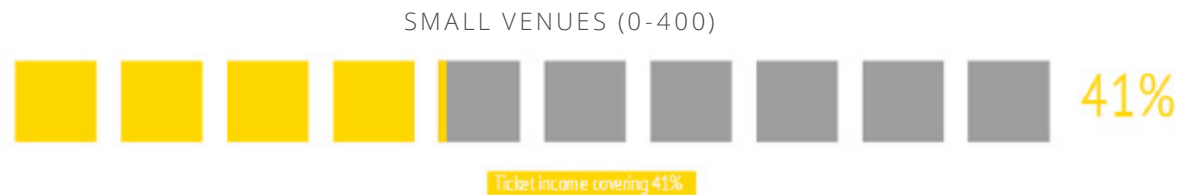
Most venues spend more money on programme costs than they earn from ticket sales. Bar income and subsidy are therefore essential to realise the current programme of music venues.



The amount of programme costs compared to the income of ticket sales.

The percentage is the total amount of programme costs divided by the total amount of ticket sales

HOW MUCH DOES TICKET SALES COVER DIRECT PROGRAMME COSTS?

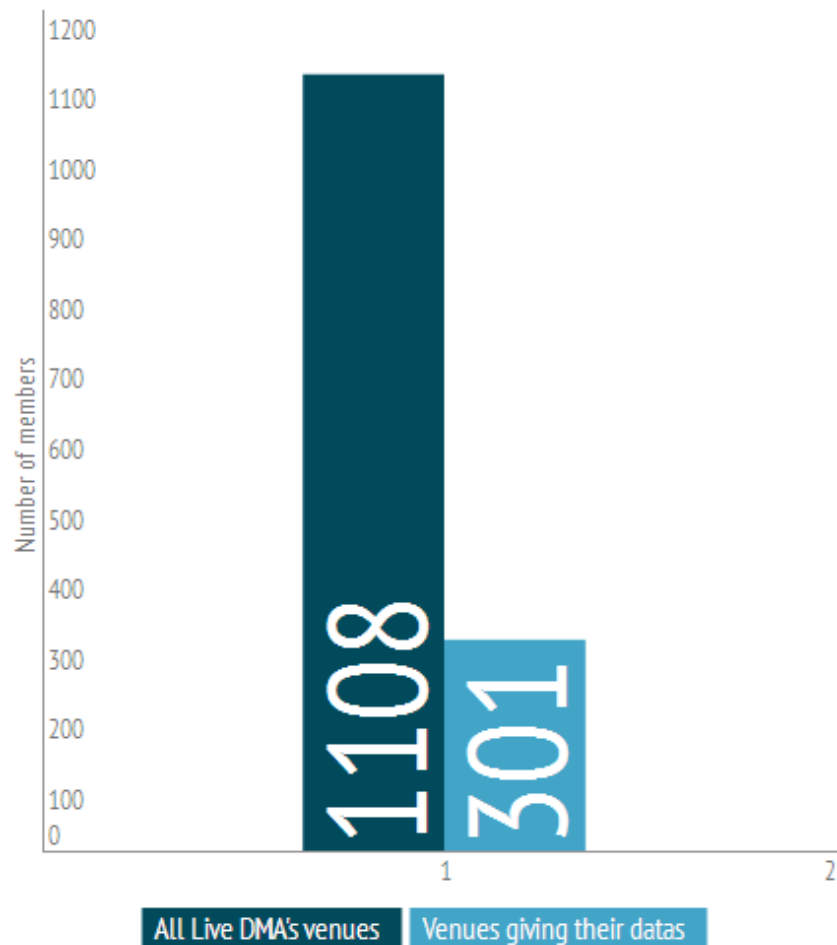


The bigger the venue, the higher the percentage of programme costs is covered.

Bar income and subsidy are therefore essential to realise the current programme of music venues, especially for smaller venues.

② The amount of programme costs compared to the income of ticket sales. The percentage is the total amount of ticket sales divided by the total amount of programme costs.

ESTIMATION BASED ON THE SURVEY'S RESULTS



The data presented previously was based on 301 venues (i.e. 27% of Live DMA's venues). From these results we can estimate the total figures of 1108 venues.

The main objective in the upcoming years is to collect data for more venues by developing the method with all our members. Our goal is also to include festivals in the near future to be even more representative of our network.

ESTIMATION FOR ALL LIVE DMA VENUES

1108 VENUES

 **1 065 000 000 €**

Total expense

 **1 111 000 000 €**

Total income

 **58 500**

Total volunteers

 **16 500**

Total paid employees

 **112,000**


Total music activities

 **241,500**

Total artist performances

 **25,500,000**

Total visits

 The data presented previously was based on 301 venues (i.e. 27% Live DMA's venues). From these results we can estimate the total figures of 1108 venues.

CONTACTS



AUDREY GUERRE

Coordinator



PHONE NUMBER

French office:
+33 240 48 08 85



EMAIL ADDRESS

audrey.guerre@live-dma.eu



HEAD OFFICE

Live DMA European Network
37 Rue Crucy – 44000 Nantes – France



www.live-dma.eu
www.facebook.com/LiveDMAnetwork
www.twitter.com/livedma



Survey coordinators

Elda Gomez - ACCES
elda.gomez@salasdeconciertos.com
www.salasdeconciertos.com

Jakob Brixvold - Dansk Live
jakob@dansklive.dk
www.dansklive.dk

Hyacinthe Chataigné - FEDELIMA
hyacinthe.chataigne@fedelima.org
www.fedelima.org

Marc Steens - Club Circuit
marc@clubcircuit.be
www.clubcircuit.be

David Dehard - Club Plasma
david@courtcircuit.be
www.clubplasma.be

Arne Dee - VNPf
arne@vnpf.nl
www.vnpf.nl

Andreas Feen Sørensen & Anders Tangen - NKA
andreas@konsertarrangor.no
anders@konsertarrangor.no
www.konsertarrangor.no



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