

2021 - STAY ALIVE

EVALUATION OF THE EFFECTS OF THE PANDEMIC BY LIVE MUSIC ASSOCIATIONS IN EUROPE AS PART OF LIVE DMA

Executive Summary

This document illustrates the advocacy work done by the European live music sector and supported by European policy-makers (MEPs, CCFG). It gives concrete **insights on the short and long-term impacts of the restrictions on live music events** due to the COVID-19 crisis.

Live music actors have complied efficiently with all sanitary measures imposed on them, even though some of them have a negative impact on event's attendance and the financial survival of live music scenes as they were continuously drafted without fully taking the sector's voice into account. Live music actors need to be consulted in the elaboration of the measures that will impact their work. The physical distancing measures, especially, need to be thought upon again in collaboration with live music actors to build collectively safe events which are financially, artistically and socially sustainable. The live music sector is suffering from some of the strictest restrictions of all sectors, showing that it is a sector which is

seen as especially dangerous without any justification.

The only positive outcome of this crisis is that the sector is even better structured now and cooperation has increased within the ecosystem. This is an opportunity for the sector and policy makers to cooperate together on the management of this crisis.

The governmental support and compensations are not sufficient or adequate to secure the live music sector's survival during its shutdown. Local, national and supra-national governments must give adequate support through all means possible in order to compensate for the loss in income, skills and diversity the live music sector suffers from and save this crucial cultural, social and economic sector. These support mechanisms must be effective now and provide a long-term perspective as well.

Evaluation of the effects of the pandemic by live music associations in Europe as part of Live DMA

At the onset of this new year, live music associations are unanimous: they wish music venues and clubs to open again in adequate conditions and to secure the festival season, as well as for these scenes to be provided substantial financial support. While calling for immediate measures to reinforce the protection of the live music sector and secure its survival, Live DMA members look ahead to exit strategies.

20 live music associations, representing more than 3000 live music venues, clubs, and festivals from 17 European countries participated in a survey about the effects of the pandemic on the sector on short and long term. Live DMA asked representatives of live music associations to re-

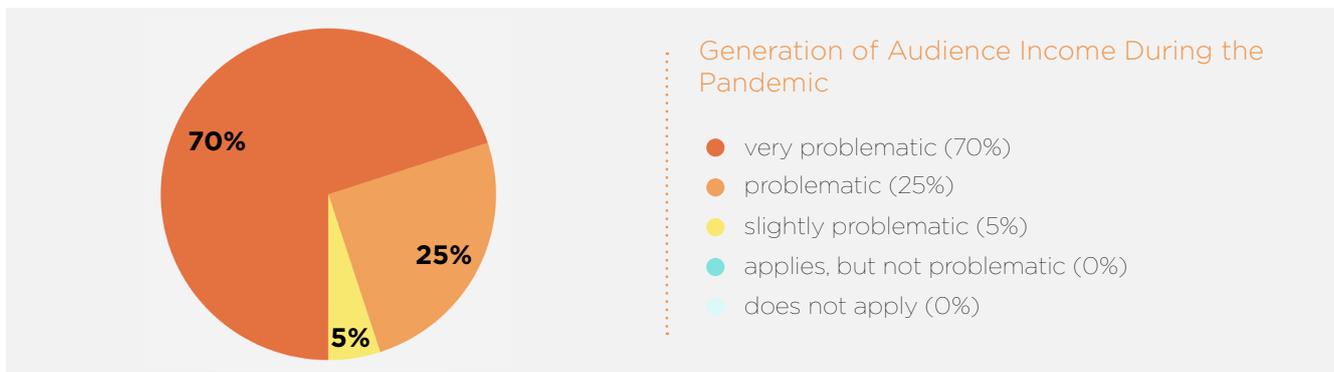
flect on existing regional and national restrictions and support mechanisms, and to explain how the pandemic affects their organisation and the structuration of the live music sector. This report gives information about the live music associations' main priorities for 2021 and what actions they need and expect from governments. It also allows Live DMA to update some recommendations to policy makers.

We call on government policies to ensure faster reopening (or keeping open) the music spaces as priority and essential sectors, including activities for music amateur practices, educational activities, and social and cultural actions.

AUDIENCE RESTRICTIONS AND LIMITED SUPPORT FROM GOVERNMENTS ARE THE MAIN REASONS FOR THE FINANCIAL PROBLEMS OF LIVE MUSIC VENUES AND CLUBS.

The Live DMA [research report](#) (September 2020) about the impact of the pandemic on live music venues and clubs revealed that venues lost an estimated 64% of their income in average, up to almost 100% loss of income for private commercial venues in some regions.

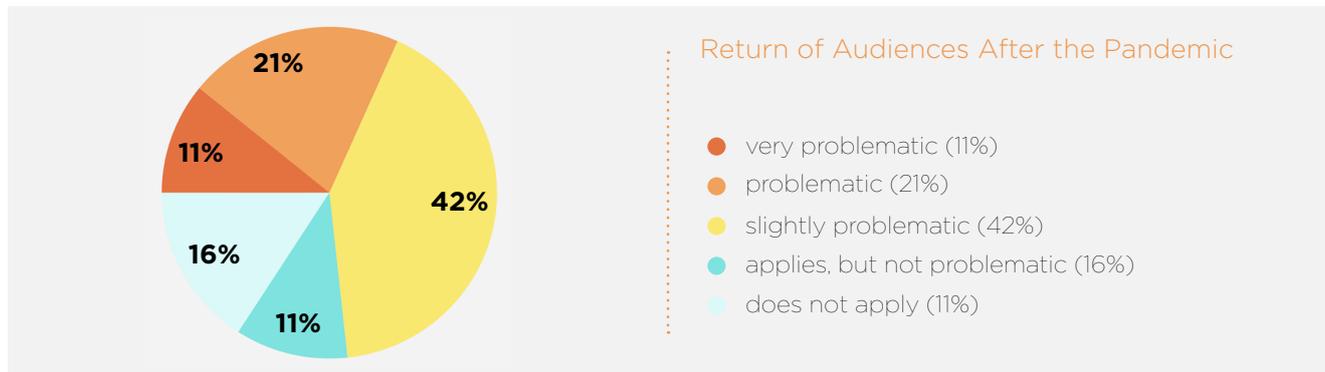
In this new report, all respondents confirm in regards to the financial issue that **not enough audience income is generated**, in relation to lockdowns or the strict restrictions on the audience: it is slightly problematic for 5% of them, problematic for 25% of them, and very problematic for 70% of them.



All respondents share **the difficulty for music venues and clubs to meet their current payment obligations** (liquidity position): It is slightly problematic for 15% of them, problematic for 45% of them, and very problematic for 40% of them.



Many live music venues and clubs have clear **doubts about the number of audiences that will return after the pandemic**. 27% of Live DMA members think that audiences should be willing and/or able to come visit, 42% think it might be slightly problematic, and 32% think it might be problematic or very problematic.



90% of Live DMA members state that **the support from governments is not sufficient to compensate the financial damage** related to the pandemic, and Live DMA members do not foresee any improvements in 2021 if governments do not change their position. It is not problematic for 10% of them, slightly problematic for 15% of them, problematic for 45% of them, and very problematic for 30% of them.



Some of the [ticketing refund policies](#) seem to have been successful: 20% of the respondents declared that it is not an issue and that the support from government or institutions was adequate. However, it still represents a problematic issue for 70% of Live DMA members.

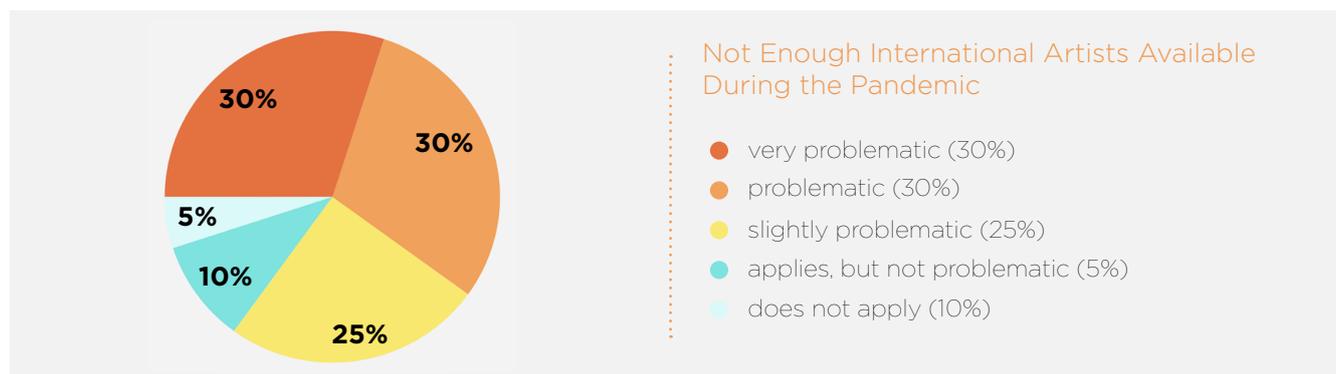
Beyond our members, the whole ecosystem of small independent structures is in danger: catering, suppliers of sound and light equipment, rental vehicles for touring artists, booking agents, communication agencies, graphic designers, etc.

These professions do not always have access to unemployment schemes, especially when they are freelancers or independent owners. One fears their disappearance for economic reasons and it will be difficult to rebuild this independent ecosystem. There is a huge risk with this pandemic that the music sector shifts from specialised and independent agents to a chain of retailers. It would represent a dramatic loss of skills, jobs and economic diversity.

THE PANDEMIC HAS ARTISTIC IMPACTS ON LIVE MUSIC ACTIVITIES.

Live DMA members also explain that only allowing audience to be seated does not just represent a financial loss, but it is also a risk for music diversity as music bookers adapt by programming “soft” music genres.

The lack of availability of international artists is a concern for a short majority of live music organisations. 60% of Live DMA members point out that **not having enough international artists available is problematic or very problematic** during the pandemic.



Even more striking is that 55% of Live DMA members expect that the availability of international artists will still be (very) problematic after the pandemic. International artists are not only important to attract audiences and therefore audience income; it also brings diversity, and gives local and national artists a chance to perform as support acts at larger international shows and meet new audiences:



However, after one year of almost no live shows, the competition is likely to be fierce and fees are likely to rise. **We call on a coherence of rules and procedures for the circulation of artists in Europe that guarantee fair and equal conditions for all artists, music venues, clubs and festivals.**

THE AUDIENCE RELATED RESTRICTIONS DUE TO THE PANDEMIC ARE PROBLEMATIC OBSTACLES FOR LIVE MUSIC ACTIVITIES.

Initiated among a safety protocol to enable music venues to restart or maintain their activity during the pandemic, the different restrictions are mostly seen as problematic obstacles to live music activities. Therefore, **live music professionals, while agreeing to implement measures to guarantee the safety of their audiences, must be consulted to discuss, prepare, and adapt their activities.** The survey shows that 95% of Live DMA members think that announcements of

continuously changing restrictive measures are coming too late leaving the sector not enough time to adapt.

Also 75% of the respondents say that the live sector has not been consulted enough by authorities before the announcement of new restrictions. Advice from live music associations has not been taken enough into account by governments when making decisions.

The most problematic restrictions seem to be the ones related to the audience capacity, specifically:

Restrictions on audience's group size

The restriction does not apply for 5% of them, it is not problematic for 5% of them, problematic for 10% of them, and very problematic for 80% of them.



Physical distancing measures

It is slightly problematic for 15% of them, problematic for 35% of them, and very problematic for 50% of them.



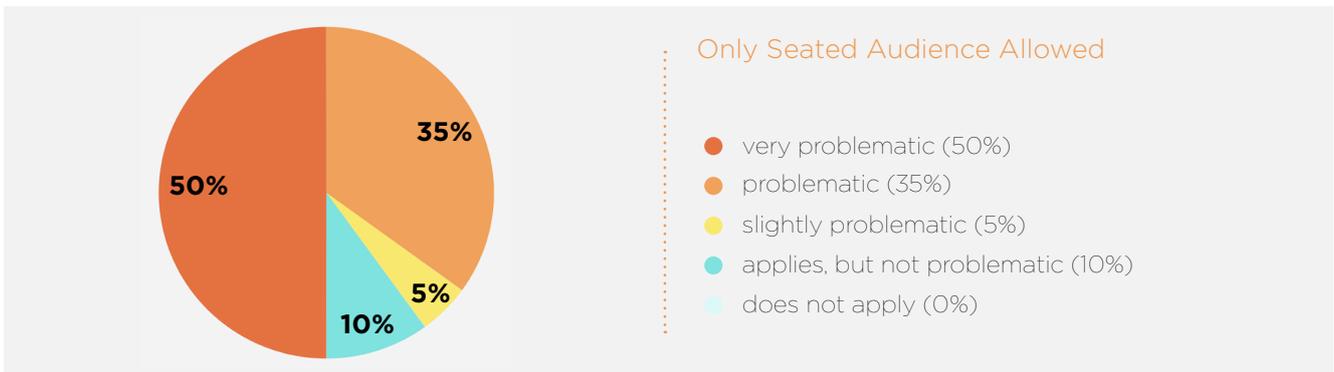
Restrictions on food and beverage sales

The restriction does not apply for 5% of them, it is not problematic for 5% of them, slightly problematic for 5% of them, problematic for 15% of them, and very problematic for 70% of them.



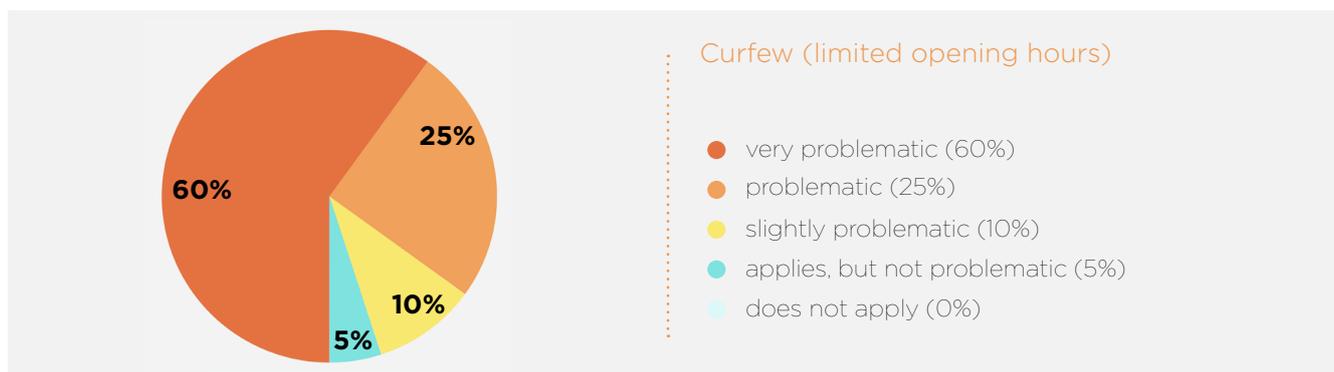
Only seated audience allowed

It is not problematic for 10% of them, slightly problematic for 5% of them, problematic for 35% of them, and very problematic for 50% of them.



Curfew (limited opening hours)

It is not problematic for 5% of them, slightly problematic for 10% of them, problematic for 25% of them, and very problematic for 60% of them.



Face masks

Wearing a face mask seems to be the least, but still problematic restriction for the music organisers. The restriction does not apply for 10% of them, it is not problematic for 10% of them, slightly problematic for 35% of them, problematic for 35% of them, and very problematic for 10% of them.



Live music venues, clubs, and festivals are social gathering places and the professionals working in these places are engaged in audience development and social inclusion. The restrictions tend to set up new barriers for the audience and might increase the gaps in terms of cultural practices.

In the light of these results, we would add the following recommendations:

- **The combination of all restrictions makes the situation even more problematic.** It would be useful to identify which measures are the most efficient and sufficient, to avoid unnecessary and disproportional restrictions to the live music sector.
- **“Consult and anticipate” should be the motto to support the live music venues, clubs, and festivals’ teams to adapt their activities and prepare the reopening of their spaces.** In too many cases, venues, clubs, and festivals were informed at the last minute of changing procedures. This is despising for the teams, and many of them alerted us about mental fatigue.
- **Live music venues, clubs, and festivals’ professionals should be seen as close partners in the management of this crisis.** They can be trusted with their large experience of management of crowds and at-risk situations for their audience’s safety (e.g.terrorism, drug use, sexual violence).
- **If governments enforce restrictions that cause direct loss of income for live music organisers, they should simultaneously and/or immediately (announce the plan and process to) compensate the financial losses to the venues that are affected by these government policies.** Saving existing live music organisations such as venues, clubs and festivals will cost less for governments and do less harm to society, than first destroying the sector and rebuilding it later.

Other restrictions, applied at different national levels were pointed as very problematic and did not bring additional positive results, so that we would not encourage to develop them on a larger scale:

- The division into sectors of different capacities with separated entrances, exits and toilets areas, which creates a very complex implementation of the measures.
- The registration of every visitor with personalized seats.

THE EFFECTS OF THE PANDEMIC ON THE ORGANISATION OF THE LIVE MUSIC SECTOR IN EUROPE

A stronger cooperation of live music venues, clubs, festivals; and a better dialogue with the policy makers.

67% of the national live music associations that are part of Live DMA declared that they increased their number of members in 2020. **In times of crisis, live music venues, clubs and festivals are looking for support, advice, community, collective voice, representation, advocacy work and dialogue with governments.**

“During this pandemic emergency political issues grew closer to venues daily life. This brought venues and festivals’ managers and artistic directors to feel more the importance of advocacy actions and consequently to sustain more the work of associations that bring on this actions. There is more attention and awareness on the network’s work and a bigger sense of cooperation, in order to obtain important results during problematic situations.”

[Anonymous respondent]

10% of Live DMA’s organisations declared a loss of members because of venues and clubs’ closure, or because they could not afford the membership fee anymore. In some cases, the national associations decided not to exclude them from their network.

The crisis clearly created **stronger relationships between live music organisations and governments, as well as between live music organisations and their members** despite the fact that they were not able to organise any physical workshops or professional events. However, it did not translate into more funding opportunities or more working force for the representative associations. These organisations have to deal with an increase of their advocacy work without any additional resource, which also means that they had less time to work for other objectives such as accessibility, sustainability and many other important topics.

A re-organisation of the cultural and music representatives

There has been, during this pandemic, an increase of networks and associations for the sector’s workers: all of these associations - including ours - are in dialogue with the institutions. Even if many of the goals are common, there are many voices that bring forward requests. This might cause scattering of information and answers as well as conflicting communications with governments. New committees gathering all associations of the cultural sector or trades of music (technicians, musicians, bookers, managers...) or event industry were created to join forces.

Policy makers often wish the sector to organise itself and represent the whole ecosystem with one voice. This strategy does not reflect the diversity of the sector and the inherent conflicts of interests. It can also represent a risk in terms of democracy by flattening the voice of the smallest actors.

A stigmatisation of live music events in the media and governmental communications

Some of **Live DMA members testify about the disproportionate measures against the cultural sector** compared to the low number of outbreaks in the venues, clubs, and festivals. While other sectors where people gather benefit from exemptions (religious service, shops, public transports), music venues and clubs have to remain closed. They suffer from a demonisation which often results from a lack of understanding of live music practices. There is also a lack of trust when implementing safety protocols while live music operators have a long professional experience in managing crowds in a safe environment.

A STEP INTO 2021

For many structures, 2021 will be of no relief. Live music organisers will most probably have to face additional problems making their already fragile situation worse. **The festival season will also set the pace and public authorities should be vigilant about insurance companies that force festivals organisers to withdraw some of their contract's clauses.**

Even though most of the live music associations succeeded in obtaining specific funds from Ministries (Culture, Economic affairs) or other government institutions, **national authorities must reinforce their support** for the live music venues, clubs, and festivals' survival:

- **Develop a protocol with the representatives of the sector to reopen and organise concerts as well as other music activities (amateur practices, music education...)**
- **Dedicate at least 2% of the European Recovery and Resilience Facility to national plans for the cultural and creative sectors**
- **Supplement the emergency fund with a safeguard fund to avoid music venues and clubs' closures and festivals disappearance**
- **Include non-public-funded venues, clubs and festivals in the cultural support programmes**
- **Provide equivalent support to live music venues as to theatres, art centres, museums etc.**
- **Establish a recovery plan on the long-term**
- **Implement additional support measures to improve the liquidity position of venues, such as ticketing refund schemes (vouchers), tax delays, easier loans, etc.**
- **Decrease the VAT rates**
- **Extend the system of temporary unemployment until the pandemic and its effects are over**
- **Extend the period of non-payment of loans' interests until the pandemic and its effects are over**

Throwback on past statement & actions:

At the end of December 2020, **104 MEPs call on governments to support EU cultural & creative sector** in line with the European Parliament's Cultural Recovery Resolution. 2% of RRF to CCS, reduced VAT rates, tax credits for cultural production, improved social protection & much more.

<http://openletter-culturalrecovery.culturalcreators.eu/>

On 16th November 2020, **Live DMA reacted and called for a reinforced and equal support to local music scenes** everywhere in Europe. You can read and download the recommendations here:

http://www.live-dma.eu/cultural-diversity-is-at-stake-live-dma-reacts/?fbclid=IwAROC7m6yYZIRpzwbtXe7Lq_F5OUS9x4NRYvcmmRY3rvAOpraukjjKjf5cb8

An earlier Live DMA publication (September 2020) about the effects of the pandemic to live music venues and clubs, and **key numbers about loss of events, performances, workers and income in 2020**, can be found here:

http://www.live-dma.eu/wp-content/uploads/2020/10/KEY-NUMBERS-IMPACT-OF-THE-COVID-19-PANDEMIC-ON-2600-LIVE-DMA-EUROPEAN-MUSIC-VENUES-AND-CLUBS-IN-2020_September-2020.pdf

About Live DMA

Live DMA is a European non-governmental network working to support and promote the conditions of the live music sector. Live DMA is by nature an international collaboration network based on shared visions and values. The members are regional and national live music associations that represent more than 3000 music venues, clubs and festivals located all over Europe. In 2017, the European Commission recognized Live DMA as European network and granted, via the Creative Europe programme, a funding to develop the network's project Live Style Europe. Live Style Europe is a "building capacity programme" with the objective to empower 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 acts as 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 International Music Council Live DMA is also actively engaging with other European cultural networks in order to make changes in the European approach to culture with the aim to include culture and the arts in the long-term goals of the European project.

This report is based on the results of a questionnaire Live DMA sent to its members on the effects of Covid-19 restrictions and governmental support mechanisms.

Respondents: ACCES (Spain), ASACC (Spain - Catalonia), Circuito (Portugal), Clubcircuit (Belgium), Collectif Culture Bar-Bars (France), Court-Circuit (Belgium), DanskLive (Denmark), Fedelima (France), Hanzas Perons (Latvia), KeepOn Live (Italy), Kultura Live (Spain - Basque Country), LiveFin (Finland), LiveKomm (Germany), Vilnius Night Alliance (Lithuania), Live Music Estonia (Estonia), Music Venue Trust (UK), Norske konsertarrangører (Norway), Petzi (Switzerland), Svensk Live (Sweden), VNPF (Netherlands);

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