

SUMMARY

Almost a year after the reopening of the live music venues, clubs, and the relaunch of festivals in Europe, **the long-lasting impact of the Covid-19 is disrupting the music ecosystem**. The live music sector is over-heating, with an increased number of events, especially during the festival season, which **creates more competition and tensions** between the music stakeholders than ever. Indeed, the live music economy has always bore fragile business models, which are now **aggravated by the raising artistic, production and energy costs**. The live music scenes are still in survival mode and they have to sell out most their events and/or increase their audience capacity and audience incomes to get a chance to stay financially sustainable. The situation represents a **risk for the independent live music scene**, as we can observe a growing concern about buy-outs of independent music festivals by larger non-music related firms, as well as aggressive strategies on the booking processes. It also **endangers emerging artists and their teams**, as bookers have less financial capacity to take risks on programming non-mainstream artists who might not attract large audiences and therefore provide enough incomes.

The situation is exacerbated by a brain drain and lack of staff, especially in technical production, since the Covid-19 lockdowns. Mental health of music professionals, which was addressed as a core issue for the cultural sector these past years, must be taken very seriously. Do we want to continue the way it used to be? How to de-escalate and preserve our staff and our organisations while supporting a growing artistic offer?

At the same time, it seems like the two years of pandemic and restrictions had an impact **on the audience who is not fully returning to live music activities yet**. Is it just a slow process that will require a bit more time and again more energy from the venues' teams to gain their audience back, or a signal of a long-term trend that will require live music organisers to reconsider their entire way of working? **What is the mission of the live music scenes in the post-Covid19 area? And how to re-establish the importance of cultural spaces in our societies while they have been considered as non-essential and declared riskier than any other places during the pandemic?** The rise of neighbours complaints about noise since the reopening of venues and clubs and relaunch of festivals demonstrates that we need to define spaces for local mediation and raise more political support towards the local music scenes, to include live music representatives in the city planning, and support more community building actions.

More and more initiatives towards a green transition are flourishing in the live music sector, as the climate emergency awareness is rising in our societies. It pushes **the live music organisers to take responsibility, act and implement new strategies to reduce their carbon emissions, but also to rethink the relevance of their current economic model**, based on infinite growth of events' production and careers' development, in terms of sustainability.

In this context, what are the live music organisers needs in terms of regulation and support from policy makers? How can live music organisations provide support to the live music venues, clubs and festivals teams in providing a fairer, more inclusive and sustainable conditions? **The current report aims to define the challenges identified by Live DMA members during the network's autumnal activities and design the milestones of our 2023 activities, based on observation, resource, exchange of good practices, capacity-building and bottom-up of proposals and collective design of policy recommendations, to contribute to an effective dialogue with policy makers at local, national and European level.**