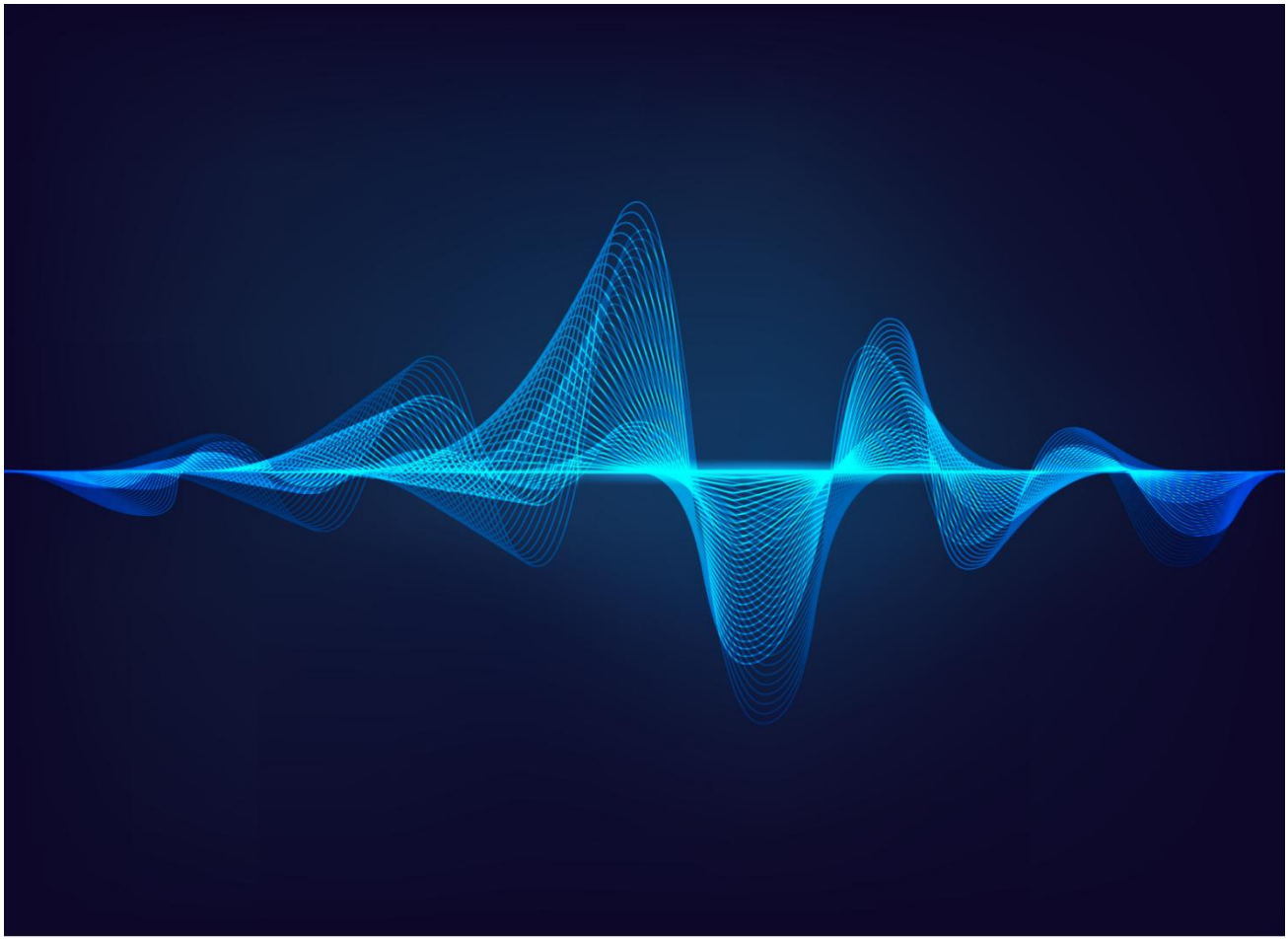

Deliverable D3.3 – Pilot Study – European Live Music Census

OpenMusE

An open, scalable data to-policy pipeline for European music ecosystems

Funded by the European Union

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Glossary

Not applicable

Executive Summary

This deliverable reports the background, methodology, and findings of the OpenMusE European Live Music Census. In October 2024, the OpenMusE project team conducted a flash census of live music activities within a 24-hour period within selected EU cities. The methodology was based on the UK Live Music Census (https://uklivemusiccensus.org/), which was co-directed by task leader Prof. Martin Cloonan. The research design and survey instruments were adapted to an EU context and to allow for transfer and uptake of the method by municipalities with limited resources (e.g., in central and eastern European markets, etc.). Applying the live music census methods in five very different cities in five European countries demonstrated both the universality of live music experiences and its value, and the range of variation in live music scenes across the continent.

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1 Introduction

Live Music Matters. We know this and we can show it. Moreover, we *need* to show it. Such was the thinking behind the first ever pan-European Live Music Census which took place in October 2024. On the snapshot date of 11 October researchers in the cities of Heidelberg, Helsinki, Lviv, Mannheim and Vilnius gathered information from local venues and audiences about the state of live music in their city. The results of that research are reported here.

The Census was coordinated by Open Music Europe (OpenMusE), a pan-European project which seeks to gather information of the European music industries. As it says on its website:

'OpenMusE brings together music industry stakeholders and researchers from 10 EU countries and Ukraine. Our consortium recognises that placing European music ecosystems on a more competitive, fair, and sustainable footing requires evidence-based policymaking, business planning and accuracy. We provide the data needed for these actions.

Using transparent methods and tools, OpenMusE maps the policy as well as the data landscape'.[1]

1.1 The Live Music Census and the Live Music Ecology

In recent years, the idea of undertaking a live music census has become increasingly popular. Following the pioneering work of the UK Live Music Census in 2016 (Webster et al., 2018), censuses have been undertaken in places such as Edinburgh, Glasgow, Melbourne, Newcastle, Oxford and many more (Flynn et al., 2018, Music Victoria, 2022, Webster et al., 2018, Behr et al., 2015) . The purpose of such censuses is to assess the state of a city's live music provision. This can be done in a number of ways but generally includes a combination of surveys for various stakeholders and the staging of a census snapshot date. Once a date for this has been determined, the next steps involve the compilation of a list of the city's venues, identifying venues hosting events on the snapshot date, and visiting as many of them as possible on the day to gather various forms of information such as ticket prices, composition of audiences, numbers of staff working, number of performers and associated staff (e.g. roadies, soundpeople) etc. In addition, surveys of audiences, musicians, promoters and venues can be used either side of the census snapshot date to provide supplementary information.

The most obvious beneficiaries of such censuses are those directly involved in live music. Censuses can help live music activists come together and learn from each other, coalescing around common issues. They can also benefit a number of third parties such as local authorities and tourism organisations which can benefit from having a vibrant local music scene and more knowledge of it. Those undertaking such censuses are often conscious of the need for them to have tangible outcomes and lobbying for change is one way of trying to achieve this.

Within academia, live music is now often referred to as an 'ecology', defined as 'a mix of venues of different capacities, demographic variations and the distinctive features of its local government and infrastructure' (Behr et al., 2015). That concept seeks to clarify the interdependencies and interrelatedness within the networks of live music. One idea here is that artists need small local venues within which to develop their

[1] For more information about the OpenMusE project, please visit: https://www.openmuse.eu/. Accessed 9 April 2025.

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talents, before they reach bigger venues. In addition, the presence of a large venue within a city may also help to support smaller venues.

1.2 The first pan-European Live Music Census

Most previous live music censuses have tended to focus on one city, although the 2017 UK Census surveyed three cities in one night. However, ours was the first live music census to undertake surveys on the same night across international borders. Here the aim was to highlight both common trends and local particularities. This section briefly introduces each of the participating cities: Heidelberg, Helsinki, Lviv, Mannheim and Vilnius. These can be summarised as follows:

City	Country	Population	Venues	Events on 11.10
Heidelberg	Germany	155,000	30	6
Helsinki	Finland	684,000	115	43
Lviv	Ukraine	720,000	39	12
Mannheim	Germany	328,000	68	26
Vilnius	Lithuania	541,000	38	11

We now provide fuller information on each participant city.

2 Our Cities

2.1 Heidelberg

Heidelberg has a population of around 155,000 people (Stadt Heidelberg, 2024a) and is known for its romantic historic old town and famous castle. Culture has always played an important role in this university town. It is one of the medium-sized German cities with the highest per capita expenditure on culture (Stadt Heidelberg 2024b) and is a UNESCO “City of Literature” (Stadt Heidelberg, 2024c). The cultural program in Heidelberg is diverse, with the two most important event venues being the Heidelberg Theatre and Orchestra, which offers a wide range of cultural performances and the Heidelberg Castle, which hosts historical exhibitions and open-air events. Heidelberg played a seminal part in the 1990s in the rise of German (speaking) Hip Hop and offered nationally known performing spaces for musical underground culture (e.g. Schwimmbad, Autonomes Zentrum) in the 1980s and 1990s. To this day it has venues for music far off mainstream (e.g. Karlstorbahnhof, Teufel). There are also lively classical and jazz scenes. Summa summarum: Heidelberg is rather small in size but full of culture. However, in recent years, live music venues in Heidelberg (as in many other places) have been struggling to stay alive, because of economic uncertainty since the Covid-19 pandemic, as well as increasingly strict regulations (SWR, 2025). Only recently, the opening hours have been restricted even further.

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After years of disputes between residents and the live music scene, bars now need to close at 1am, even on weekends (ibid.).

2.2 Helsinki

Located on a peninsula in the Gulf of Finland, Helsinki is Finland's capital city.

In 2025, its population is estimated at 684,000 (Statistics Finland, 2025). Helsinki is 80 kilometres north of Tallinn 400 kilometres east of Stockholm and 300 kilometres west of Saint Petersburg and has important historical links with each. The city generates around a third of Finland's GDP and 83 of the 100 largest Finnish companies have their headquarters there. The University of Helsinki is a major international university, and the city is also home to Aalto University and the University of the Arts, along with eight other higher education institutions.

The city offers a vibrant music scene, with a wide range of live music heard within the city. It has a good range of venues from small bars up to the Olympic Stadium which can hold 50,000 people for live music events. significant venues of varying capacities include two ice hockey stadiums, the National Opera and Ballet (Kansallisooppera ja -baletti), the Hall of Music (Musiikkitalo), the House of Culture (Kulttuuritalo), the Musicians' Union-run G Livelab Helsinki and the longstanding rock and pop venue Tavastia-klubi, which has been hosting standing gigs and concerts since 1970. Internationally famous acts from Helsinki include Haloo Helsinki, HIM, the Hurriganes, and the Rasmus.

2.3 Lviv

Lviv, a Ukrainian city just 70 kilometres from the Polish border and home to about 720,000 (Population Stat, n.d.-a) people, combines centuries-old heritage with youthful energy. Recognised by UNESCO as a Global Heritage City, it hosts over 25 institutions of higher education and 38 vocational education institutions (Derzhavne pidpryyemstvo Inforesurs, n.d.), fuelling a dynamic audience profile and diverse music scene which even during the war with Russia continues to attract a lot of tourists. The burgeoning technology industry, with numerous IT companies and start-ups, adds to the city's contemporary pulse.

The city is characterised by musical diversity. The historic Solomiya Krushelnytska Opera House anchors Lviv's cultural landscape, while the jazz scene thrives through venues like Dzyga and the city's acclaimed festivals. Underground metal reverberates through FestRepublic and Lower Hall of Puppet Theatre, while indie bands populate intimate venues across the old town. The city's unique restaurant culture seamlessly blends with live music – with themed venues like Kryivka featuring traditional Ukrainian ensembles. With dozens of cultural venues, from the grand Philharmonic Hall to street-level performance spaces, Lviv's musical ecosystem flourishes even under the present circumstances. The prestigious Lysenko Music Academy ensures a constant flow of emerging talent, cementing the city's status as Ukraine's cultural powerhouse. Lviv's internationally recognized acts include Somali Yacht Club, who shine brightly on the European stoner/psychedelic rock scene, while the city's alternative landscape features influential post-punk band Nazva and metal heavyweights 1914, who've gained recognition for their WWI-themed compositions.

2.4 Mannheim

Mannheim has a population of around 328,000 people (Stadt Mannheim, 2025a) and is located in the German state of Baden-Württemberg. It became famous for its music and culture in the 18th century thanks to the “Mannheim School”, a group of court musicians and composers whose decisive musical innovations characterized stylistic elements of Viennese Classicism. In November 2014, Mannheim was awarded the title "City of Music" by UNESCO. The award recognizes the quality and potential of the music scene and aims to promote international visibility through financial and cultural cooperation (Stadt Mannheim, 2025b).

This rich history and diversity of music are reflected in Mannheim's music scene today. In addition to the well-known Mannheim University of Music and Performing Arts and the Baden-Württemberg Pop Academy, the city also offers the Mannheim National Theatre and the Mannheim State Theatre. The city's stages present a colourful mix of jazz, electronic and classical music, with a variety of venues including clubs, concert halls and festivals such as the Mannheimer Jazzfestival and the Mannheimer Mozartfest.

2.5 Vilnius

Vilnius is the capital of Lithuania with a population of about 541,000 (Population Stat, n.d.-b). There are 11 universities and 4 colleges and therefore many young people. In recent years Lithuania’s economy has outperformed the EU average and Vilnius has boomed, in contrast to many other cities in Europe. There are also more emigrants returning than leaving, reversing the trend that has persisted ever since Lithuania joined the EU in 2004.

Although there are sports facilities and outdoor areas that can hold tens of thousands of people, there is no modern concert hall for orchestras (one is under construction and some of the Soviet occupation era facilities have been renovated). There is also no large purpose-built venue for musical styles other than classical. Vilnius has a strong jazz tradition dating back many decades, with jazz being the most “rebellious” music tolerated by the Soviet occupiers. There is also a strong tradition of underground punk and political protest music, again linked to the city’s historical context. While there are many small venues and performers, there are very few successful commercial exports. One reason for this may be the very short history of commercial music in the region and the economic domination of television as a revenue source, which stifles innovation. In recent years the municipality has funded cultural centres and music spaces in an attempt to correct this imbalance.

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3 Methodology

In a first step, live music venues were identified via desk research using common criteria across the five target cities: Heidelberg, Helsinki, Lviv, Mannheim and Vilnius. The definitions of what constitutes a live music venue or a live event were discussed with the team, and as a result of different interests, requirements, and circumstances in each city, a compromise was made to include all venues that (1) host a live music event at least once a month, (2) market live music as an important part of their business model, and (3) have a performance stage.[2]

In addition, as a collaborative effort, the snapshot date for the Live Music Census was chosen to be exemplary, not representative of a "typical" night for live music among the participating cities. As previous research has found, no such night can be predefined, as the number of events on any given night inevitably varies across the year and across cities (Behr et al., 2015).

The date for comprising a 'snapshot' within each city was set for the 11 October 2024: the 24-hour observation period ran from noon until noon on 11—12 October.

We adopted a broadly similar methodological approach in each city. This consisted of two surveys to venues which were open before and after the Census snapshot date of 11 October.[3] It also included an online survey for audiences, accessible via a QR code included in the Census materials provided in each city. There was some variance in what was offered in addition to this basic survey. For example, in Helsinki a total of 15 people visited 26 events and gathered information using an online observation survey, while in Mannheim 3 people visited 18 venues to promote the audience survey, but without using an online observation survey. The audience surveys were left open for two weeks after the Census snapshot date.

[2] Cf. Behr et al. (2021): "A live music event is one at which musicians (including named DJs) provide music for audiences and dancers gathering in public places where music is the principal purpose of that gathering." (p. 114).

[3] Due to low response numbers the second venue survey data is not available on the OpenMusE Live Music Census Dashboard.

4 Census Procedure and Findings in Five Cities

The following section outlines the tasks undertaken in each of the five participating cities during the European Live Music Census conducted in October 2024.

4.1 Heidelberg

30 venues were identified in Heidelberg, out of which 6 hosted a live music event on 11 October 2024. All 30 venues were contacted via e-mail and social media and were invited to take part in the study and to fill in the venue surveys. Additionally, the SINUS team responsible for the Heidelberg and Mannheim Censuses planned five short video interviews in Mannheim (4) and Heidelberg (1) with venue owners or managers, musicians and audiences.

In Heidelberg no cooperation with local representatives could be established, despite numerous attempts to get in touch with the municipality and the Night Mayor. As in Mannheim, SINUS staff distributed promotional materials during the week leading up to the Census snapshot date. However, cooperation with venues in Heidelberg proved to be much more challenging than expected. On the one hand, that was due to the simple fact that there were only a very small number of live music venues in general, and only six live music events took place in Heidelberg on Census snapshot date. On the other hand, we could not build on a local collaboration, such as Next Mannheim, to increase trust. The initial contact with live music venues was therefore more laborious, and in most cases not successful.

Due to these issues, the overall response rate was low. Only six venues filled in the first venue survey, and only three the second survey.[4] The audience survey results were even lower, with only seven respondents having filled out the survey.[5] For a quantitative study, these response rates are unfortunately too low to conduct a meaningful (much less representative) analysis. It was therefore decided to not include the Heidelberg survey results, but to instead explain the challenges encountered in Heidelberg and make recommendations for how future censuses can mitigate similar challenges. We do this in the Appendix.

4.2 Helsinki

On Friday 11 October 2024 around 10,400 people went to see live music in Helsinki.[6] The number of music enthusiasts heading out to gigs, concerts, choirs and musical theatre equates to roughly 1,5% of Helsinki residents (Statistics Finland, 2025). A total of 164 audience participants from varied age groups and of different musical tastes took part in the audience survey in Helsinki to share their experiences and

[4] The total sample of the second venue survey consisted of six responses. One respondent did not fill out the survey past the first question. Due to the low sample, data for the Heidelberg Census was excluded from the OpenMusE Live Music Census Dashboard.

[5] The total sample for Heidelberg consisted of seven responses. In the Heidelberg the audience survey questions regarding respondent's gender, age, place of residence had a response rate of 100%. For the rest of the questions the response rate varied between three and six respondents. The variance in response rates had likely to do with most of the questions marked as optional.

[6] The number of gig-goers on 11 October was estimated using the observation survey that the group of Helsinki Census volunteers along with the two project researchers filled in while visiting 24 venues and 26 events on the snapshot date. Prior to Census date a total of 43 events were mapped out to take place on 11 October. As a part of filling out the survey observers talked to members of venue staff, e.g. restaurant managers, door staff and the tickets-sale personnel (cf. Behr et al. 2021, p. 112). However, the number remains likely an underestimate as we didn't get to all of the venues hosting music.

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practices of attending live music events in the city.[7] The next section lays out the main tasks undertaken in the Helsinki Census:

i. A Mapping of Helsinki venues following the open access live music venue list provided by the Live Music Advocacy Organization LiveFIN (2021).
ii. The total amount of venues identified in Helsinki was 115.
iii. Mapping of snapshot date events through contacting venues, checking venues' homepages and social media sites as well as various websites listing local events. The number of events identified to take place on 11 October was 43.
iv. Publicity campaign & preparatory work:
    a. Contacting venues, the City of Helsinki Council, the Helsinki Live Music Association ELMU, LiveFIN & the Musicians' Union.
    b. Setting out a media release and contacting culture desks and journalists of major news media, the music media and local newspapers.[8]
    c. Raising awareness of the audience survey: 100 posters, 1500 beermats, 2000 flyers based on visualised templates produced by SYNYO for OpenMusE were distributed to venues prior to and during the snapshot date by the researchers.
v. We recruited volunteers for the snapshot date through the Helsinki Live Music Association ELMU. In total 13 volunteers signed up to visit and observe the venues hosting live music events on the snapshot date, plus the two authors, making a total of 15 people visiting venues on 11 October.
vi. The first venue survey was released three weeks prior to the snapshot date, with 15 venues responding.[9]
vii. On the snapshot date of 11 October, visits to 26 events across 24 venues were made by 15 people (13 volunteers and 2) researchers to gather information on the events. The estimated total audience attendance on snapshot events = 10,400 people.
viii. The audience survey was made available on the snapshot date, resulting in a total sample of 164The audience survey included an incentive of a draw for tickets to live music events in cooperation with four local venues,[10] each offering ticket prizes for upcoming events. The draw was carried out on 5 December 2024, with 121 out of 164 respondents also participating in the draw.
ix. The second, complementary venue survey made available on the snapshot date for a period of one month. Total number of replies was 12.[11]

[7] The total sample for Helsinki consisted of 187 responses, but for the purpose of this report the responses with mainly missing values were excluded from the sample, thus resulting in the reported N=164 here. In the Helsinki the audience survey questions regarding respondent's gender, age and whether the respondent attended a live music event on the Census snapshot date had a response rate of 100% = 164. For the rest of the questions the response rate varied between 82% and 95% (N=135—164). The variance in response rates had likely to do with most of the questions marked as optional. The percentages presented in the report were calculated using the number of responses given to the respective questions, also cited systematically throughout the report. The percentage figures were then rounded up or down corresponding to whole numbers.

[8] We issued a media release, which attracted very little attention. This doubtless is an issue for further reflection.

[9] The total number of responses for the first venue survey issued before the Census snapshot date was 16, including two responses from the same venue. The second response with mainly missing values was deleted from the sample, thus resulting in the total sample of 15 cited here.

[10] We'd like to express our gratitude to the four venues in question – heartful thanks for the cooperation. However, to ensure the anonymity of the venue survey respondents, we withhold the names of the venues here.

[11] The total sample of the second venue survey consisted of 12 responses. Unfortunately, however the response rate gradually declined after the first question, resulting in a total of 8 responding surveys finishing the survey and filling out all the answers. This doubtless is an issue for further methodological reflection. After the first question the response rate varied between 67% and 91% (N=8—11). The variance in response rates had likely to do with most of the questions marked as optional. The percentages cited in the report were calculated using the number of responses given to the respective questions, also cited systematically throughout. The percentage figures were then rounded up or down corresponding to whole numbers.

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1) There has been continued liaison with venues and stakeholders following the Census snapshot date and during April-May of 2025 a series of follow-up interviews are being conducted.

This was the first survey of its kind ever undertaken in Finland. However, we should note that the limited scope of issues covered in the surveys,[12] along with the relatively low response rate means that the Helsinki findings ought to be treated with an element of caution. In particular, with regard to the small quantitative samples, the findings set out in the report can be considered as elucidating and illustrative, rather than *necessarily* being representative. For the purpose of this report, we conducted a comparative cross-reading of the quantitative and qualitative datasets and thus were able to map out the most distinct and recurring themes and topics across sets of data.

In this report we aim to indicate that Helsinki is a suitable site for such work and to establish a precedent for future censuses. For the first time, we have links to an unprecedented number of venues in Helsinki, along with details and key challenges of their programming. We have shown what we already believed - that music fans in Helsinki are passionate about the diversity in music as well as venues. Furthermore, in the light of comparative reading of the survey datasets of the OpenMusE Live Music Census, they are willing to spend considerable sums on it.[13] We are confident that the findings here provide further knowledge of - and insights in to - Helsinki audiences' and venues' current concerns.

4.3 Lviv

The Lviv Live Music Census identified 39 venues, with 12 hosting live events on the snapshot date. Our six-person team visited all active venues, collecting 77 audience questionnaires. While only one venue completed the pre-census survey, 22 provided post-census responses.[14] This lower initial participation reflects a structural challenge in Ukraine's live music industry – the absence of venue associations at both national and regional levels – which meant we had to establish individual contacts one by one. Venues typically only engaged after personal interaction during the Lviv Census week.

Key Research Limitations:

- The citywide curfew due to the Russian invasion of Ukraine (midnight - 5 AM) eliminated nightlife activities
- Venue identification proved challenging without a centralised registry, despite consulting the Cultural Strategy Institute's cultural venue map, which is general and did not provide the opportunity to compare it to live music census criteria such as staging live music at least once a month, having a performance area and placing live music as a central part of its provision
- Collecting financial data proved to be especially difficult - independent venues were reluctant to share with the non-governmental organisation (Music Export Ukraine), while state-owned venues were uncertain about disclosure permissions and regulations

[12] We had purposefully designed a snapshot survey for audiences which could be filled out quickly – within less than 5 minutes – while at an event and with similar intentions made the venue censuses as short as possible.

[13] All the survey data analysed and cited in this chapter is available online via the open access Dashboard located at the OpenMusE project website: https://www.openmuse.eu/dashboard/ Accessed 7 April 2025.

[14] All the survey data analysed and cited in this chapter is available online via the open access Dashboard located at the OpenMusE project website: https://www.openmuse.eu/dashboard/ Accessed 7 April 2025.

- Ukraine's low barrier to entry business environment leads to frequent venue openings and closures, making tracking difficult
- Large-scale events are currently suspended for war-related security reasons, though previously Arena Lviv (35,000 capacity) regularly hosted concerts and festivals

The study revealed a concentration of nightlife in Lviv's Old Town. Space constraints in this densely packed historic district make opening new venues challenging, pushing larger venues toward industrial areas. FestRepublic exemplifies this trend, offering a 1,000-5,000 capacity multi-functional space on the outskirts, though this location requires most attendees to travel by car.

The following was also found on Census snapshot date:

(i) Demographics and Attendance Patterns

The live music audience is predominantly female (77%), likely due to the ongoing Russian invasion of Ukraine where many men are either serving in the military or avoiding public spaces due to mobilisation concerns.[15] Age distribution shows a strong youth focus, with 79% aged 18-29 and 17% aged 30-39.[16] The notable absence of older audiences reflects, among other factors, a cultural preference for restaurant outings over concerts among families. Generally older generations are not attending concerts, unless the performers are big famous names from their youth. Young men under 25, though operating on limited budgets, as they are predominantly still students, make up most of the male audience. This is, again, most probably connected to mobilisation concerns, as now men aged 25-60 are currently obliged to serve in the military.

(ii) Audience Behaviour and Satisfaction

Most attendees (61%) combine events with dining out, reaching venues by walking (39%), by bus (42%), or taxi (30%) as the latter is still relatively affordable.[17] The scene receives positive feedback, with 81% rating it favourably (53% "good," 28% "very good").[18] Genre preferences are quite evenly distributed among pop (42%), classical/opera (40%), folk (38%), and jazz (35%).[19]

(iii) Event Frequency and Barriers

While 25% of audience respondents attend 2-3 events monthly and 8% go more frequently, the majority (67%) attend concerts less than monthly, indicating growth potential.[20] Key barriers include ticket costs (47%),

[15] In Lviv the total sample of the audience survey consisted of 52 responses. The first two questions in the survey had a response rate of 100% with 52 responses. For the rest of the questions the response rate varied between 63,5% and 98% (N=33—51). The variance in response rates had likely to do with some of the questions marked as optional. Similar issues related to discrepancies in response rates occurred in each city, which doubtless is an issue for further methodological reflection. The percentages cited in the report were calculated using the number of responses given to the respective questions, also cited systematically throughout. The percentage figures were then rounded up or down corresponding to whole numbers.

[16] The question regarding respondents' gender had a response rate of 100% with 52 responses.

[17] The response rates for both questions cited here had a response rate of 64% with 33 responses.

[18] The question had a response rate of 90% with 47 responses.

[19] The response rate of the multiple-choice question was 92% with 48 responses.

[20] The response rate of the question was 92% with 48 responses.

information gaps (27%), and scheduling conflicts or lack of time (29%).[21] Audiences would attend more with cheaper tickets (21%), greater venue variety (27%), and broader genre options (25%).[22] The predominantly young audience's limited spending power, combined with current economic conditions, makes running music venues solely through ticket and food/drinks sales unsustainable. The situation clearly indicates a need for government support and international funding to maintain a vibrant live music scene.

(iv) Venue Challenges and Solutions

A significant portion of audience respondents desire greater diversity - 27% want more venue options and 25% seek a broader genre variety. This aligns with venue promoters' feedback about programming challenges. With international acts largely absent from Lviv's touring circuit due to economic and security concerns, the local scene faces isolation and struggles to provide diverse offerings.

(v) Wartime Impact on Lviv's Music Scene

Despite wartime limitations (curfews, bomb threats, infrastructure damage), Lviv's music industry has adapted through interactive shelter maps, revised security protocols, and earlier event times. The critical challenge is human capital loss - industry professionals, from technical crews to artists, face ongoing mobilisation. As of 2025, most male artists previously working with Music Export Ukraine now serve in military roles (communications, logistics, combat). While infrastructure can be rebuilt, the potential loss of talent poses an existential threat to the industry's recovery, emphasising the urgent need for international support in protecting Ukraine.

4.4 Mannheim

We identified 70 live music venues in Mannheim out of which 26 hosted a live music event on 11 October 2024. All 70 venues were contacted via e-mail and social media and were invited to take part in the study and to fill in the first venue survey. Additionally, the SINUS team planned five short video interviews in Mannheim and Heidelberg with six venue owners or managers, four musicians and three audience members. The videos were planned as a communications campaign to be published on social media, but the interviews turned out to include valuable insights into the challenges and needs of live music venues.

We cooperated with Next Mannheim (next-mannheim.de), a subsidiary of the municipality of Mannheim that supports cultural innovation and employs Mannheim’s Night Mayor.[23] Building on their established network within the live music sector in Mannheim, Next Mannheim initiated a first contact with the venues. This cooperation helped to build trust and generated some first responses to our venue survey.

Leading up to the Census snapshot date, promotional material consisting of posters, flyers and stickers were printed. They explained the study in the local languages and depicted a QR-code with a link to an online audience survey. During the week before the Census snapshot date, a team of four SINUS-employees visited

[21] The question had a response rate of 87% with 45 responses.

[22] The response rate of the question was 92% with 48 responses.

[23] Special thanks to Robert Gaa and Dr. Matthias Rauch of Next Mannheim for their invaluable assistance in quality-checking the Live Music Census survey questionnaires and other materials, planning and conducting outreach to venues, and providing insights on conditions and needs in the Mannheim music scene and on the municipal cultural policymaking process.

all live music venues in Mannheim, to distribute the promotion material, get a closer personal contact to the venues, and invite the venues once again to fill in the first venue survey. Most venues were interested in the study and happy to spread the promotion material. However, employees were often hesitant to make this decision, or to fill in the survey, and asked us to contact owners or upper management via the general e-mail address, which we had already done previously.

Simultaneously, a social media campaign was launched via the OpenMusE Instagram account (with support from Next Mannheim), inviting venues and audiences to join the study. A post for each city was published just before the snapshot day with a link to the audience survey. Then, the venues were asked to share the post in their social media stories and feeds, and to help to promote the study. A few venues participated in the campaign proactively, but this was the exception rather than the rule.

On the Census snapshot date, three SINUS employees visited 18 live music events in person to encourage audiences to take part in the survey. In addition, two SINUS employees visited five venues to film video interviews on the night before the Census, and on the Census snapshot date itself. Between filming breaks on the Census snapshot date, they invited live music audiences to fill in the online survey. Altogether, 89 responses to the audience survey were collected in Mannheim.

Right after the snapshot night, all venues were invited to fill in a second venue survey. 18 venues filled in the first venue survey[24], and 8 venues filled in the second venue survey.

Nightclubs accounted for 4 out of 18 live music venues surveyed in Mannheim, followed by concert halls (3), bars and pubs (4), restaurants (2), arts centres (2), arenas (1) and other live music venues (2). Besides performances by live musicians (15) and performances by featured DJs (13), more than half of venues also offer bar or restaurant services, which remains an important source of revenue.

Almost two thirds of live music venues have been active for more than 10 years, with an average of 21 years of operation. However, less than half of venues with a capacity of less than 200 people have been active for more than 10 years. This suggests that smaller venues find it more difficult to stay alive, something also found in the UK Live Music Census (Webster et al., 2018). This is concerning as half of venues have a capacity of less than 200 people, and smaller to medium-size venues with less than 700 people make up the majority of the local live music environment (15 out of 18 venues).

11 out of 17 live music venues in Mannheim reported being negatively affected by regulations, something which is perhaps surprising within a UNESCO City of Music which markets itself as a musical destination. When asked what the government or municipality should do to help the live music scene, “reducing bureaucracy” was a common request.

A related challenge concerns noise complaints, which were reported by affecting 7 out of 17 live music venues in Mannheim. This is especially difficult for smaller venues that struggle to afford to appropriately soundproof their premises. Venues would appreciate the support of the municipalities in finding a solution to this issue.

An equally important issue since the Covid-19 pandemic is unpredictable audience attendances, which is a challenge for about two thirds of venues. This goes hand in hand with certain other factors, such as the current economic conditions (affecting 13 out of 17 venues) impacting the populations willingness to spend money on live music, food and drinks, which also leads to unpredictable revenue (affecting 8 venues), while competition

[24] The total sample of the first venue survey consisted of 18 responses. Only 17 venues completed the full survey. The variance in response rates had likely to do with most of the questions marked as optional.

from other venues increases simultaneously (affecting 6 venues). Changes in local demographics or audience preferences are a challenge for 6 venues. During the video interviews, venue owners explained that people's priorities and preferences appear to have changed, which leads to a reduction in spending.

Finally, the shortage of skilled labour, which is a problem across various sectors in Germany, also negatively affects live music venues: 6 venues claim that they have issues with staffing or employee retention. Attracting talents or artists is also a challenge, albeit a rather minor one (2 venues).

When asked about sustainability, nearly all venues surveyed agreed that music venues and festivals have a responsibility to become more environmentally friendly. Discrimination and corruption seem to be smaller issue in Mannheim, with only three venues perceiving discrimination as a problem, and none perceiving corruption as a problem.

Despite all forementioned challenges, a clear majority of live music venues in Mannheim were optimistic about the future of their venue (11 out of 17). They were aware of their cultural importance in the city, not only by providing live music of different genres, but also by bringing people together, and by offering a stage for young artists.

The gender distribution of respondents in Mannheim is fairly balanced (46% male, 53% female, 2% other, N=68). The age profile of respondents shows a predominantly young audience (18-29 years: 40%), though people from the 70+ age group also participated in the survey (70+: 4%). The majority of respondents (69%) resided in the surrounding areas of the city where they attend live music events.

Respondents in Mannheim spent an average of €58 (Median: €38) on the live music event they attended. The main costs were ticket prices (Mean: €29, Median: €10) and food/drinks (Mean: €19, Median: €15). For 36% of respondents, the high costs for food/drinks were attributed to restaurant visits in addition to the Live Music Event. Accommodation, transportation, and merchandise costs were negligible for most respondents (Overall Mean: €9, Median: €0). The low transportation cost (Mean: €7, Median: €0) can be explained by the fact that about 41% of respondents used their private car or public transport (local train or tram: 30%, bus or trolley bus: 9%) to get home, and 24% mostly walked home, while only 6% used a taxi or rideshare. Mixed forms of transportation were common.

The respondents rated their evening positively overall: 83% said their evening was (very) good, while 17% rated it as average. Not a single respondent gave a negative rating.

When asked to evaluate the live music scene, respondents were generally positive, although there was a noticeable difference between very good ratings (13%) and good ratings (46%). 36% of respondents rated the live music scene in Mannheim as average.

Open answers to the question "Finally: why do YOU think a healthy live music scene is important for Mannheim?" generally reflected a positive assessment of the city's music scene. Two respondents expressed the sentiment that Mannheim's scene could be even better, especially given its status as a UNESCO City of Music. However, most respondents who answered the open question praised Mannheim's rich musical history and culture and indicated that fostering this culture is key to preserving the city's identity.

Among the survey respondents, the most popular music genres for live music events were Rock (58%), Pop (45%), Dance/Electronic (44%), and Jazz (38%). Most respondents attend a live music event no more than once a month (39%). However, a large proportion also attend such events at least 2-3 times a month (34%). As many as 11% of respondents report attending around 6 times or more per month. 50% of respondents prefer small venues (200-699 capacity) for live music events, while 38% prefer very small venues (under 200).

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When considering barriers to attending live music events, scheduling conflicts or lack of time (62%) emerged as the biggest obstacle. Financial barriers also play a significant role: 47% of respondents cited high ticket prices as a barrier. Cultural and structural barriers were also identified, including a lack of interest in the artists and genres on the program (24%), insufficient pre-event information (18%), and inadequate public transportation options (18%). Finally, concerns about safety or security at events are a considerable issue for 18% of respondents, preventing them from going out more.

Motivations for attending more live music events include availability in traditional pubs (23%), lower ticket prices (21%), and more variety in music venues (13%).

In addition to the data presented, general statements about the live music scene were also gathered. The statement with the highest level of agreement was: "I'd be very upset if music venues in the city started shutting down" (86%). Answers to the open question suggest that Mannheim audiences especially appreciate the role music plays in their city.

Survey statements reflecting the social value of live music also received high approval: "Live music connects people from different countries and cultures" (73%). Open question answers confirm that Mannheim audiences see music as a means to – as one respondent put it – 'promote networking and culture' and for different kinds of people to share deeply positive experiences. Based on their consistent and often passionate appreciation for the contributions of live music to psychological well-being, social connectivity and capital, and cultural richness and diversity, it should come as no surprise that a clear majority of Mannheim audiences agree with the statement: "Musicians and DJs should earn a living wage from their work" (66%).

4.5 Vilnius

In Vilnius 38 music venues were identified, of which 11 declared hosting a live music event on snapshot night. The vast majority of venues stated that live music is their raison d'être. On the survey night, 16 venues (those in the main nightlife areas) were visited by 3 volunteers in person to encourage participation in the audience survey. Participation in the audience survey was comparatively high at 118 responses.[25]

A majority of venues identified participated in the first survey.[26] Participation dropped between the two survey rounds, with some respondents dropping out partway through the second survey. The rest of the Vilnius report consists of three parts – venue surveys, audience surveys and observations on the Census snapshot date.

i. Surveys of venues before and after the Census snapshot date

Contrary to the belief that venues come and go quickly, we found that 11 out of 23 respondents had been in operation longer than 10 years. We found that the vast majority do not serve food of any kind, a known issue which is often raised by consumers as negatively impacting on their night. Despite frequent doom stories in the press (BNS, 2024), we found that 61% of the responding venues were optimistic about the

[25] In Vilnius the total sample of the audience survey consisted of 118 responses. The first three questions in the survey had a response rate of 100% with 118 responses. For the rest of the questions the response rate varied significantly, ranging from 28,8% and 92,4% (N=34—109). The variance in response rates had likely to do with some of the questions marked as optional. Similar issues related to discrepancies in response rates occurred in each city, which doubtless is an issue for further methodological reflection. The percentages cited in the report were calculated using the number of responses given to the respective questions, also cited systematically throughout. The percentage figures were then rounded up or down corresponding to whole numbers.

[26] N=24

future while 3 out of 23 respondents were not, and 26% remained uncertain about their prospects. About a fifth of the responding venues cited regulation as a problem.[27] Corruption and discrimination were perceived to be leaning on the lower end, reflecting a general downward trend since joining the EU.[28] Venue owners expressed pride in providing spaces for culture and innovation. As we expected, the dominant venue ownership model was found to be private rental but also around half of respondents claimed to carry out less-profitable social and educational activities.

ii. Surveys of audiences on (and after) the Census snapshot date

We extended the survey before the Census snapshot date and our sample included many who were not participating in events on the snapshot date. A majority of 53% of the audience survey respondents stated that they participated in live music events from none to one time a month, while 34% replied to attend two or three events and a total of 13% replied attending four or more events monthly.[29] It was expected that most respondents would prefer large pop events, but in fact micro and small venues were overwhelmingly preferred (72%).[30] Most respondents who went to a live music venue that night chose events with free entry, a problem identified by venue owners and consistent with the finding that tickets are considered unaffordable.[31] However, high satisfaction levels (63% good/very good, 28% average and 9% bad/very bad) regarding the status of the local scene and high level of spending on food and drink might suggest that consumers have sufficient money for tickets, but spending on tickets is not prioritised because the costs of providing live music are under-appreciated or not known to them.[32]

iii. Observations on the snapshot date/11 October

The Census snapshot date of 11 October was not especially cold, and the streets were relatively lively. There were unexpectedly many new venues that had not been visited by our volunteers or were not even known to our volunteers,[33] suggesting high confidence in the economy and low barriers to entry. Around 25% of respondent venues had opened since the pandemic and they appeared to be attracting consumers. Expectedly, the vast majority of nightlife participants were concentrated in the Old Town, where property prices mean only a few can afford to live. This creates mobility challenges and the reinstatement of night buses

[27] 22% (5 out of 23 venues that responded to the question) of the responding venues did consider regulation a problem.

[28] 6 out of the 23 venues that responded to the question either strongly disagreed (26%) or somewhat agreed (26%) with the statement regarding corruption, while 4 out of 23 somewhat disagreed (17%) and 7 replied not knowing (30%). Accordingly, 6 out of the 23 venues that responded to the question regarding discrimination somewhat disagreed (26%), while 11 out of 23 strongly disagreed (48%) and 3 out of 23 either strongly (1) or somewhat (2) agreed with the statement and 3 venues replied not knowing.

[29] The question had a response rate of 92% with 108 responses.

[30] The question had a response rate of 92% with 109 responses. A total of 37% of respondents cited preferring micro venues, while 35% of respondents reported small venues as their favourite. 22% of respondents reported favouring medium-sized venues, while 6% viewed large venues as preferable.

[31] The question regarding spending on the snapshot date had a response rate of 33% with 39 responses. The question regarding issues preventing event attendance had a response rate of 75% with 89 responses. The issue of too costly tickets was by far the most prominent response, with a majority of 62% of the audience respondents reporting it. The second-most prevalent issue identified was lack of interest in artists and genres with 45% of the responses stating it.

[32] However, it should be noted that the response rate of 33% for the question regarding spending on the snapshot date was on the lower side, with 39 responses out of the total 118 audience respondents answering the question. The question regarding views on the local scene had a response rate of 92% with 108 responses.

[33] These are included in the total amount of venues in Vilnius.

since the pandemic seems to have been a wise step. As usual for Vilnius, the perception of safety was very high in the Old Town and our volunteers encountered no public order incidents at all.

5 Summary of Key Outcomes

With five cities under review, across four countries and with different population sizes, the findings inevitably varied. In addition, while general themes emerged there were also a number of themes which are particular to the cities in question. This is most obviously the case with Lviv, which has been subject to attacks from Russian forces since the invasion in February 2022. We now present the main findings from each city.

5.1 Heidelberg

As described in 4.1, audience results were very low in Heidelberg, with only six people having filled in the survey. Unfortunately, these results are not substantive enough to conduct a representative analysis. It was therefore decided to not include the Heidelberg survey results, but to instead explain the challenges encountered in Heidelberg and make recommendations for how future censuses can mitigate similar challenges. We do this in the Appendix.

5.2 Helsinki

- The accessibility of live music is a major concern for Helsinki venues and audiences. Rising ticket prices, the late time that gigs started and a lack of information were all cited as reasons for not attending more live music events. Audiences suggested that a good public transport system was a prerequisite for a thriving live music scene.
- The smaller spaces providing live music within Helsinki are considered vital for a diverse local live music ecology. Smaller venues were by far the most popular choice for enjoying live music, widely appreciated for offering a diverse mix of musical genres. Importantly it was recognised that smaller venues are an important building block for upcoming artists and bands towards playing bigger venues. Thus, such venues are a vital incubator for the arena-filling acts of the future.
- A healthy local live music ecology gives back economically, culturally and socially. The economic importance of live music has been recognised elsewhere and was clearly evident in audiences (where tourism as cited as an important issue) and in venue responses. But live music as also seen as something which could unite people and allow them to be human. Music's potential to unify people was seen as being particularly important during a time of political turbulence. Importantly live music venues are often more than that offering spaces to other artforms and opportunities for voluntary working. The economic, cultural and social elements intertwine, meaning that all will benefit by improvements to the provision of live music live music.

5.3 Lviv

- Lviv's live music scene is active despite the Russian invasion of Ukraine event numbers surpass pre-war and pre-pandemic levels, with all venues adding a levy which is used to support those affected by war.
- Women drive Lviv's live scene: over three-fourths of concert attendees surveyed were women, as many men are away serving in the military.
- The Lviv live music scene is very young, with four out of five concert attendees being under 30.
- A venue crisis looms: Despite high attendance, young audience's limited spending power threatens sustainability.

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- International isolation challenges programming: venues struggle with artist diversity as foreign acts are unable and/or reluctant to tour in Ukraine due to war-related safety concerns and the country's difficult economic situation.
- A brain drain threatens the live music industry's future: key music professionals are joining the military, creating a critical skills gap that money alone is unable to fix.

5.4 Mannheim

- Live music venues are facing significant challenges in Mannheim, with the most important being regulations, public complaints, and unpredictable attendance rates.
- Unpredictable revenues and attendance rates have remained a significant challenge since the Covid-19 pandemic, with venues observing important changes in night culture.
- Nevertheless, venues remain optimistic amid these challenges and are aware of their cultural importance in the city.
- Overall, audiences rate the live music scenes in Mannheim positively and support its cultural and social value.
- The majority of respondents attend live music events rather irregularly, with the highest barriers being time conflict and ticket prices. The most significant potential motivators for boosting attendance are increasing live music in pubs and lowering ticket prices.

5.5 Vilnius

- Live music venues are highly valued, and there is generally strong demand for protecting them from closure, as opposed to leaving them to compete in a free market.
- Satisfaction with the live music scene is high, as in all cities which have nightlife friendly regulation (notably, it was much lower in the only city with nightlife unfriendly regulation, although the sample size was too small to be certain).
- Cost is held to be very influential and is generally considered to be too high.
- Eating out on the same night as attending a live music event is a very common practice, showing live music's impact on the whole night life economy.
- People choose to use public transport at night (as is plausible in any city where it is most widely available).
- Even in this anonymous survey, only a very small minority stated that narcotics are an important part of their nightlife, a finding which runs very contrary to public perception.

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6 Next Steps

Each participating city was asked to give some thought as to what the next steps could and/or should be undertaken. In general, a dashboard will be published on the OpenMusE website, giving stakeholders the opportunity to view, compare and make use of the Live Music Census results. The data will be displayed in a way that is easy to comprehend by non-specialists, with maps and graphs to visualize the results. What is more, the report will be published on the project website and shared by the consortium and other relevant partners. Finally, the video interviews will be published on our website and social media channels to illustrate our findings and make them more tangible to a larger audience of musicians, venue owners and other industry stakeholders. We now provide responses from each city and then offer a summary.

6.1 Heidelberg

Our experience showed that a live music census only makes sense in a city with a certain level of live music events happening on a census snapshot date, and an interest from local authorities to learn about their live music scene and promote the research activities. In Heidelberg, neither was the case. The SINUS team therefore decided not to invest further resources into follow-up tasks in Heidelberg, but instead concentrate on Mannheim, where the external conditions are more favourable. In the appendix, we further elaborate on our learnings in Heidelberg.

6.2 Helsinki

While previous work conducted by the live music advocacy organization LiveFIN has included reports on the industry, covering venues, festivals and audiences, figures for the value of live music are aggregated only at national level. So, in common with the other cities in this work, this was the first time that something such like this Live Music Census had been undertaken in Helsinki. Now there is something to build on. We were warmly received in many places and there is clearly a great deal of goodwill around. The issue is therefore how to develop and mobilise that goodwill.

We held a launch event for the Helsinki Report in the Bar Loose venue on 27 February 2025 (Cloonan & Tuukkanen, 2025). The aim was to gather interested parties, report findings and consider next steps. The result was that representatives from across Helsinki's live music scene gathered together and provided feedback on the report which was welcomed as an important first step. We will follow up the report by undertaking a series of interviews with key stakeholders and obtaining their views on ways forward, especially regarding the desirability of repeating the Census on a periodic basis. Depending on the outcomes we will seek to further develop policy and/or report findings elsewhere. Following the key findings of the Helsinki Census we suggested the relevant stakeholders to consider the following:

i. Taking the time to look into the Helsinki report and consider its implications
ii. Coming together to fund another, more comprehensive Live Music Census in 2026
iii. Investigating ways to make Helsinki's musical offering more diverse
iv. Encouraging the staging of more music at earlier times in the day
v. Bringing stakeholders – such as musicians, promoters, venues, cultural organisations, the city and fans - together to build a live music ecology which serves them all and keeps the city alive

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We will interview key stakeholders about their views and hope to play a role in facilitating the actions listed above.

6.3 Lviv

There are three key areas here:

i. Research Impact and Communication

We are planning a media campaign to showcase the Live Music Census methodology and findings, demonstrating how this research model can be replicated. The campaign will highlight how venue participation strengthened the study and seek to engage with the city administration in order to emphasise the value of the city's live music industry. A key goal here is encouraging venues to form an association that could facilitate regular research, collective advocacy, and shared problem-solving.

ii. Municipal Support and Growth

Lviv's city administration is actively working to enhance the city's music-friendly status. A notable success has been in attracting the Faine Misto music festival (with a 20,000 capacity) from Ternopil through improved conditions and support over the last two years. This might provide an opportunity to run a live music census in 2025 with the support of their team.

iii. Future Research Potential

As this pioneering study was conducted independently, some state-owned venues were hesitant to participate or failed to recognise its importance. An annual repetition of the Lviv Census would seem likely to increase participation, particularly from state venues, as the value of such a census becomes more apparent. Regular surveys would also boost overall venue response rates as the industry better understands the benefits of such research. Potential solutions to avoid isolation as a result of the war include facilitating international artist exchanges, organizing study visits, and arranging split concerts even for niche genres, which could help break this isolation and enrich the city's musical landscape.

6.4 Mannheim

For Mannheim, the next step will be to contact the municipalities, as well as local live music venues and associations directly and provide them with the results. A workshop or round table, e.g. in collaboration with Next Mannheim, is being envisioned to discuss the results with the aforementioned stakeholders. What is more, the OpenMusE consortium will conduct a representative cultural access and participation survey in Germany, that will include certain audience questions asked during the Live Music Census. This will allow us to compare our data, collected from a rather small sample in only one city, with a representative, Germany-wide sample. Finally, the OpenMusE consortium is highly interested in conducting further iterations of the Live Music Census to allow for longitudinal analysis.

6.5 Vilnius

The municipality is clearly doing a good job in Vilnius, or at least not doing a bad job. However, this survey was the first of its kind ever undertaken in the city. In part this seems to be because the municipality's prioritisation

of data collection and analysis of live music is low or even negative - i.e. data collection is avoided and evidence-based policy making principles are not respected or viewed as necessary in this field. The OpenMusE survey broke new ground as it was the first to count and categorise all the venues and the first to listen to nightlife consumers' and venue owners' opinions. It is hoped that the announcement of the results of this survey will spark more interest from all stakeholders, including the municipality, and in upcoming years the trend will be to allocate a lot more resources to data collection and monitoring.

7 Conclusion

We knew that Live Music Matters before we started this work. At the end of it we now have evidence of *how* it matters in various ways in different places. While passion for live music was evident across our five cities, how that passion was catered for or not varied locally. Wartime Lviv is obviously an extreme example of how locality affects provision. However, concern difficulties in working with venues in Heidelberg, concern over high prices in Helsinki, problems for smaller venues in Mannheim and lack of data in Vilnius in addition to a range of regulatory issues across the cities all Illustrated the importance of local nuance. While live music is a universal, its fate is often determined locally. That means that individuals can make a difference – as audience members, musicians, venue operators, promoters and policymakers.

It is important to emphasise that the first-ever pan-European Live Music Census developed out of another research project, OpenMusE. Those working on the Census were generally doing so on top of numerous existing commitments. One result of this was that the Censuses were often smaller than would be ideal. Generally, researchers had time to implement the Census, but not to follow up and try to get more participants. We have proven the feasibility of undertaking a pan-European Live Music Census and illustrated some of the issues which emerge when doing so. Our next steps will be taken in conjunction with both existing and new partners. We're looking forward to the dance.

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Annex I: Challenges and Insights from Conducting the Live Music Censuses in Heidelberg and Mannheim

When conducting the Live Music Census in Heidelberg and Mannheim, a number of observations that can provide important learnings for future censuses or similar studies were made.

At the beginning of the study, SINUS wanted to focus on Mannheim, which is a UNESCO City of Music. After further consideration, it was decided to include Heidelberg in the Live Music Census, as the two cities are very close to each other and Heidelberg's decreasing nightlife has been criticized for years. There was a strong assumption that we would have a high level of interest from the Heidelberg operators in the Live Music Census to communicate what could work better for them. Contrary to expectations, recruitment in Heidelberg was much more difficult than in Mannheim. Local authorities were not interested in a collaboration and attempts to get in touch with the municipality, or the night mayor were fruitless.

What is more, the low number of events, only six on Census snapshot date compared to 30 in Mannheim, should have been a warning sign that a live music census in Heidelberg might not be successful. In order to yield enough responses to analyse, the response rate per live event (i.e., the number of people answering the survey) would have had to be significantly higher than is normal in face-to-face surveying. The reasons that an attempt was made anyway were: 1) the proximity of Mannheim and Heidelberg, 2) the fact that SINUS has an office in Heidelberg, 3) the "black swan" bet that concern over the condition of Heidelberg nightlife might drive above-average participation – which as noted above turned out not to be the case.

Given the low number of events in Heidelberg, low venue participation, and lack of interest by relevant public authorities, a decision was made to send most of the SINUS project team to Mannheim to promote the audience survey in as many venues as possible. On the Census snapshot date, only one SINUS employee covered the six events in Heidelberg. This was probably the right choice, as it ensured a robust response in Mannheim – however, even better would have been a larger project team and/or to engage a limited number of volunteers, as was done in Helsinki.

Given these challenges, different census methods might be better suited to small cities and/or cities with circumscribed music scenes. As is appropriate given Heidelberg's musical history, its music scene is robust for its size. However, for a survey-based exploration of 24 hours in the musical life of a city to make sense, there must be a baseline number of potential "observations" to quantify: i.e., venues in operation, venues hosting events, audience members attending events. Despite the quality of musical life in Heidelberg, in simple numerical terms, the method was not a good fit due to a limited number of observations.

As noted above, one mitigation measure would have been to dispatch more team members. For instance, if one team member/volunteer had been able to attend each of the six Heidelberg live events for the duration of the event, distributing survey links throughout, then it is possible a robust response would have been achieved. Additionally, an observation survey could have been used as a backup data source, as was done in the original UK Live Music Census and in the Helsinki iteration of this Census.

Even richer findings could have been achieved by pushing the methodology in the direction of qualitative/mixed-methods participant ethnography. In the above scenario, in addition to distributing survey links, the team members could have engaged in dialogue with audience members, performers, and venue staff. Moreover, in addition to filling in a quantitative observation survey, they could have made field memos describing the events, the crowd dynamics, the street life of the neighborhoods in which the venues were located, etc. With appropriate care to GDPR and other ethics issues, photos and/or video could have been

captured. The findings could then have been reported in a more narrative or even ethno-poetic mode, with attention paid not only to describing the event but also to the participant-observers' own experience of the musical, cultural, and social "atmosphere". Of course, each such methodological decision would require preparatory work: reviewing different kinds of literature, recruiting and training the participant-observers, developing qualitative/mixed-method data collection instruments (e.g., semi-structured discussion guides and memo templates) and an appropriate mode of analysis and reporting, etc. While OpenMusE did not end up taking this route, considering the hypothetical shows how a survey-based quantification of musical life is not the only type of "live music census" imaginable – nor necessarily the best-suited to every type of city or town.

In Mannheim the conditions were more favourable. Nevertheless, the cooperation with Next Mannheim certainly helped to establish a personal contact with the venues, which proved to be highly important. Regardless, convincing the venues to take part in the surveys was generally rather laborious and often only possible through personal contact on site with those responsible for the venues. Making contact through email was only partially successful in almost all cases. Nightclubs were particularly difficult to recruit. Overall, it was much easier to get in touch with smaller venues, whose owners and managers showed a more proactive interest in the idea of a live music census.

During our study, it occurred to us that due to German bureaucracy, live music venues already need to fill in a large number of forms and surveys, oftentimes providing the authorities with the exact same information, we now asked of them. We therefore assume that this led to a certain survey fatigue among live music venues. However, when filming the video interviews, venue owners and managers were very eager to tell us about their venues, the challenges they face or the support that they would wish for.

Participants were able to take part in the survey using the QR-Codes, which were accessible via posters, flyers and stickers. During the study, we learned that audiences were more likely to fill in the surveys when approached directly face-to-face by the SINUS staff. The print material went largely unnoticed otherwise. Vilnius had less difficulties with the QR-code-based respondents, which might be due to cultural differences.

The SINUS team thus tried to visit as many venues as possible in order to motivate guests to take part in the survey. Compared to the other Census cities, we had very limited staff on the ground. In future studies, we would therefore aim to recruit a larger number of volunteers to encourage audiences to take part in the interviews.

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Annex II. Audience Survey Questionnaire

Start of Block: Default Question Block

Thank you for joining the first European Live Music Census! We are a group of universities and music industry stakeholders funded by the EU within the project OPENMUSE (https://www.openmuse.eu/). We have eight questions, which will take about three minutes – your answers will help us support the live music scene in Mannheim / Heidelberg and create music-friendly policies on an EU level.

The Live Music Census is a snapshot of musical activity in Mannheim and Heidelberg between October 11th 12:00 noon and October 12th 12:00 noon. It is:

- Anonymous. We don't collect any data that could identify you.
- Voluntary. You can skip any question or stop at any time, and there are no advantages or disadvantages to participating.
- Non-commercial. Data will be used solely for research to improve the live music scene.
- Secure. Data will be stored on secure servers in the EU and shared only in aggregated form.

At the end of the survey, you'll have the option of joining a raffle to win one of five ticket vouchers worth 50€!

By clicking "Next" and completing this survey, you consent to participate in the survey under the conditions above, in compliance with the General Data Protection Regulation.

If you have any questions, please contact us using this form: https://www.openmuse.eu/contact/

OPENMUSE is funded by Horizon Europe grant no. 101095295.

End of Block: Default Question Block

Start of Block: Block 4

Q1 Please select the city you are in

- ○ Mannheim (1)
- ○ Heidelberg (2)

End of Block: Block 4

Start of Block: Block 1

Q2 Are you ...?

- ○ Female (1)
- ○ Male (2)
- ○ Another gender identity (3)



Q3 In what year were you born?

_____

Skip To: End of Survey If Condition: In what year were you born? Is Greater Than 2006. Skip To: End of Survey.

Display This Question:

If Please select the city you are in = Mannheim

Q4a Do you live in the Mannheim area?

- ○ Yes (3)
- ○ No (4)

Display This Question:

If Please select the city you are in = Heidelberg

Q4b Do you live in the Heidelberg area?

- Yes (3)
- No (4)

Display This Question:

If Please select the city you are in = Mannheim

Q5a Are you going or did you go to one or more live music events (including featured DJs) in Mannheim between Oct. 11th 12:00 noon and Oct. 12th 12:00 noon?

- Yes (3)
- No (4)

Skip To: End of Block If Are you going or did you go to one or more live music events (including featured DJs) in Mannheim... = No

Display This Question:

If Please select the city you are in = Heidelberg

Q5b Are you going or did you go to one or more live music events (including featured DJs) in Heidelberg between Oct. 11th 12:00 noon and Oct. 12th 12:00 noon?

- Yes (3)
- No (4)

Skip To: End of Block If Are you going or did you go to one or more live music events (including featured DJs) in Heidelbe... = No

Q6 While going out for live music on October 11th to 12th, about how much money will you / did you spend on the following (in total)?

Ticket/entry: : _____ (1)
Transportation: : _____ (2)
Food and drink: : _____ (3)
Merchandise: : _____ (4)
Accommodation: : _____ (5)

Total : _____

Q7 Will you / did you eat at restaurants?

○ Yes (1)

○ No (2)

Q8 How will you / did you get home? Please tick all that apply.

- ☐ Mostly walking (1)
- ☐ Bus or trolley bus (2)
- ☐ Local train or tram (3)
- ☐ Taxi or ridesharing (Uber, Bolt, etc.) (4)
- ☐ Private car (5)
- ☐ Bicycle (6)
- ☐ Scooter or motorcycle (7)
- ☐ Long-distance train (8)
- ☐ Airplane (9)
- ☐ Other (10)
- ☐ ⊗ I don't know (11)

Q9 How was your night?

- ○ Very bad (1)
- ○ Bad (2)
- ○ Average (3)
- ○ Good (4)
- ○ Very good (5)

Page Break

Q10 Do you want to help us even more by answering eight more questions about music?

- ○ Yes (1)
- ○ No (2)

Skip To: End of Survey If Do you want to help us even more by answering eight more questions about music? = No

End of Block: Block 1

Start of Block: Block 2

Display This Question:

If Please select the city you are in = Mannheim

Q11a How would you rate the live music scene (including featured DJs) in Mannheim?

- Very bad (1)
- Bad (2)
- Average (3)
- Good (4)
- Very good (5)

Display This Question:

If Please select the city you are in = Heidelberg

Q11b How would you rate the live music scene (including featured DJs) in Heidelberg?

- Very bad (1)
- Bad (2)
- Average (3)
- Good (4)
- Very good (5)

Q12 What kinds of music do you most often go to see live? Please tick all that apply.

- ☐ Pop (1)
- ☐ Rock (2)
- ☐ Hip-Hop / Rap (3)
- ☐ Dance / Electronic (4)
- ☐ Latin (5)
- ☐ R&B (6)
- ☐ Classical / Opera (7)
- ☐ Country (8)
- ☐ Jazz (9)
- ☐ Folk (10)
- ☐ Experimental (11)
- ☐ Other (12)

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Q13 On average, how many live music events do you attend per month (including featured DJs)?

- ○ 0 - 1 (1)
- ○ 2 - 3 (2)
- ○ 4 - 5 (3)
- ○ 6 or more (4)

Q14 In what size of venue do you most enjoy seeing live music? Please tick one.

- ○ Very small (less than 200) (1)
- ○ Small (200 - 699) (2)
- ○ Medium (700 - 1999) (3)
- ○ Large (2000 or more) (4)

Page Break

Q15 Have any of the following things prevented you from going to live music events in your area more often? Please tick all that apply.

- ☐ I feel out of place or like I don't belong. (1)
- ☐ The cost of tickets is too high. (2)
- ☐ Limited accessibility/facilities for disabled people. (3)
- ☐ Insufficient pre-event information for disabled people. (4)
- ☐ Insufficient pre-event information in general. (5)
- ☐ Inadequate public transport options. (6)
- ☐ Cost of public transport. (7)
- ☐ Scheduling conflicts or not enough time. (8)
- ☐ Concerns about safety or security at events. (9)
- ☐ The timings of live music events are too restrictive. (10)
- ☐ Lack of interest in the artists and genres on the programme. (11)
- ☐ I don't enjoy the venues in my area. (12)

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Q16 Which one of the following things would most encourage you to see live music in your area more often? Please tick one.

- ○ Better venue facilities (e.g. sound quality, pleasant spaces) (1)
- ○ Central information point about local live music events (2)
- ○ Cheaper tickets (3)
- ○ Earlier event start times (4)
- ○ Later event finish times (5)
- ○ More/later public transport (6)
- ○ More live music in pubs (7)
- ○ More variety of music genres (8)
- ○ More variety of music venues (9)

Display This Question:

If Please select the city you are in = Mannheim

Q17 Do you agree with any of the following statements about live music and nightlife? Please tick all that apply.

- ☐ I'd be very upset if music venues in Mannheim started shutting down. (1)
- ☐ I've met some of my best friends through live music (venues, festivals, etc.). (2)
- ☐ I've performed live music or DJed in front of an audience this year. (3)
- ☐ Musicians and DJs should earn a living wage from their work. (4)
- ☐ Musicians and DJs shouldn't be afraid to express political opinions through music. (5)
- ☐ Live music connects people from different countries and cultures. (6)
- ☐ Music venues and festivals have a responsibility to become more environmentally friendly. (7)
- ☐ The Mannheim live music scene has discrimination problems (e.g. racism, sexism, homophobia). (8)
- ☐ The Mannheim live music scene has corruption problems (e.g. bribes, under-the-table work). (9)
- ☐ When I go see live music, I like the volume turned up to '11'. (10)
- ☐ I don't always feel safe when I go out at night in Mannheim. (11)
- ☐ When I go out at night, I wouldn't say no to a one-night stand. (12)
- ☐ Drugs are an important part of the nightlife experience. (13)

Display This Question:

If Please select the city you are in = Heidelberg

Q17b Do you agree with any of the following statements about live music and nightlife? Please tick all that apply.

- ☐ I'd be very upset if music venues in Heidelberg started shutting down. (1)
- ☐ I've met my partner through live music (venues, festivals, etc.). (2)
- ☐ I've performed live music or DJed in front of an audience this year. (3)
- ☐ Musicians and DJs should earn a living wage from their work. (4)
- ☐ Musicians and DJs shouldn't be afraid to express political opinions through music. (5)
- ☐ Live music connects people from different countries and cultures. (6)
- ☐ Music venues and festivals have a responsibility to become more environmentally friendly. (7)
- ☐ The Heidelberg live music scene has discrimination problems (e.g. racism, sexism, homophobia). (8)
- ☐ The Heidelberg live music scene has corruption problems (e.g. bribes, under-the-table work). (9)
- ☐ When I go see live music, I like the volume turned up to '11'. (10)
- ☐ I don't always feel safe when I go out at night in Heidelberg. (11)

Display This Question:

If Please select the city you are in = Mannheim

Q18a Finally: why do YOU think a healthy live music scene is important for Mannheim?

_____

_____

_____

_____

_____

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Display This Question:

If Please select the city you are in = Heidelberg

Q18b Finally: why do YOU think a healthy live music scene is important for Heidelberg?

_____

_____

_____

_____

_____

End of Block: Block 2

Start of Block: Block 3

Q19 Thank you! Would you like to enter a raffle to win one of five ticket vouchers worth 50€? For this we'll need your email address but will NOT connect it to your survey answers.

○ Yes – I'll provide my email address (1)

○ No thanks! (2)

Skip To: End of Survey If Thank you! Would you like to enter a raffle to win one of five ticket vouchers worth 50€? For thi... = No thanks!

Before we ask your email address, here's some info about the study.

Project title: European Live Music Census 2024 – Audience Survey
Project framework: Open Music Europe (OpenMusE) Project, funded by the European Union under Horizon Europe grant no. 101095295
Project contact: https://www.openmuse.eu/contact/
Coordinating organisation: SINUS Markt- und Sozialforschung GmbH (https://www.sinus-institut.de/en)
Coordinator: Dr. James Edwards (jamesrhys.edwards@sinus-institut.de)
Date: 11.10.2024

Data collection and use:

We will collect your email address in order to randomly select prize winners from all survey participants, and contact the winners to deliver the prizes.

Data storage, security, and retention:
Your email address will be stored securely, separately from your survey responses. It will only be accessible to the research team. It will be retained only as long as necessary to complete the raffle and notify the winners, after which it will be deleted.

Your rights:
Sharing your email address and participating in the raffle is entirely voluntary. Under the GDPR, you have the right to:

- Access the email address we have on file for you.
- Request that your email address be corrected.
- Withdraw your consent at any time, which will result in the deletion of your email address (and your withdrawal from the raffle).
- Lodge a complaint with the relevant authorities if you believe your email address has been mishandled.

Consent to participate
By entering your email address below, you agree to the following and consent to participate under the conditions above, in compliance with the General Data Protection Regulation:

- I have read and understood the project information.
- I understand that my email address will be treated with confidentiality and used solely for the purpose of the raffle.
- I am aware that participation is voluntary and that I can withdraw at any time without penalty.

- I understand that I have the right to access, correct, object to, or request the deletion of my email address.
- I consent to the processing of the data provided in this survey in accordance with the GDPR.

Q21 E-Mail address

_____

End of Block: Block 3

Annex III. Pre-snapshot Venue Survey

Start of Block: Informed Consent

Project Title: European Live Music Census 2024 – Venue Survey

Project Framework: Open Music Europe (OpenMusE) Project, funded by the European Union under Horizon Europe grant no. 101095295

Please read the following information carefully before providing your consent to participate in this survey.

- I am age 18 or over.
- I have read and understood the Project information sheet
- I understand that the data provided will remain confidential and will be used solely for the purposes of this research project.
- I understand that the data provided will not be shared with anyone in a way that could identify my venue.
- I am aware that participation is voluntary and that I can withdraw from the survey at any time without penalty.
- I understand that I have the right to access, correct, object to, or request the deletion of my venue's data.
- I consent to the processing of the data provided in this survey in accordance with the GDPR.

○ By checking this box, I confirm that I am authorized to provide information on behalf of the venue and that I consent to participate in this survey under the terms outlined above. (1)

Q1 Please fill in the following

○ Venue Name (1) _____

○ Representative's Name (2) _____

○ Position (3) _____

○ E-Mail (4) _____

○ Date (5) _____

End of Block: Informed Consent

Start of Block: General Information

Q2 Address of venue (city and postcode):

_____

_____

_____

_____

_____

Q4 Legal status:

- ○ Private commercial (1)
- ○ Private non-profit (2)
- ○ Public (3)
- ○ Public-private partnership (4)
- ○ Other (5)

Q5 Name of legal entity operating venue

_____

_____

_____

_____

_____

Q6 Under what arrangement do you use your current premises?

- ○ Private ownership (1)
- ○ Private rental (2)
- ○ Public ownership (3)
- ○ Public rental / lease (4)
- ○ Another arrangement (charity, cooperative, etc.) (5)

*

Q7 In which year did the venue start operating (in any space, not necessarily your current one)?

_____

Q8 On what days is your venue open?

- ☒ Everyday (1)
- ☐ Monday (2)
- ☐ Tuesday (3)
- ☐ Wednesday (4)
- ☐ Thursday (5)
- ☐ Friday (6)
- ☐ Saturday (7)
- ☐ Sunday (8)

Q9 In which months is your venue open?

- ☒ All year round (1)
- ☐ January (2)
- ☐ February (3)
- ☐ March (4)
- ☐ April (5)
- ☐ May (6)
- ☐ June (7)
- ☐ July (8)
- ☐ August (9)
- ☐ September (10)
- ☐ October (11)
- ☐ November (12)
- ☐ December (13)

Q10 How would you best describe your venue? Please tick one.

- ○ Arena – large, covered, multi-purpose arena or conference centre (1)
- ○ Arts centre – multi-arts, multi-purpose venue (2)
- ○ Bar, pub with music – main focus is alcohol sales with occasional music (3)
- ○ Church/place of worship – place of worship which hosts live music events beyond its regular services (4)
- ○ Concert hall – dedicated music venue, mainly seated gigs (5)
- ○ Hotel or other function room (6)
- ○ Music venue – dedicated music venue, mainly standing gigs (7)
- ○ Nightclub – dedicated nightclub, mainly for dancing (8)
- ○ Restaurant/café with music – main focus is food with occasional music (9)
- ○ Social club/community centre/village hall/sports hall – meeting place, generally formed around a common interest, occupation, activity or location (10)
- ○ Stadium – large, usually uncovered, main purpose usually for sports (11)
- ○ Student union/university building (12)
- ○ Theatre/opera house – mainly theatre with some live music/opera (13)
- ○ Other (14)

Q11 What is your venue's approximate overall capacity (e.g., all performance spaces)?

- ○ Fewer than 40 people (1)
- ○ 40-199 people (2)
- ○ 200-399 people (3)
- ○ 400-699 people (4)
- ○ 700-999 people (5)
- ○ 1000-1999 people (6)
- ○ 2000 or more (7)

Q12 What types of events, activities, and functions does your venue offer? Please tick all that apply.

- ☐ Performances by live musicians (bands, solo artists, etc.) (1)
- ☐ Performances by featured DJs (2)
- ☐ Tools and space for musicians (3)
- ☐ Social and education (workshops and classes) (4)
- ☐ Support for artists' projects (5)
- ☐ Bar/restaurant (6)
- ☐ Exhibition/photo gallery (7)
- ☐ Cinema and film (8)
- ☐ Multimedia and visual art (9)
- ☐ Theatre/dance (10)
- ☐ Other activities (11)

Q13 Will your venue hold a live music event on Friday, 11 October 2024?

- ○ Yes (1)
- ○ No (2)
- ○ I don't know (3)

End of Block: General Information

Start of Block: Operating environment and sociocultural impact

Q14 Is your venue negatively affected by any of the following? Please tick all that apply.

- ☐ Regulations (1)
- ☐ Economic conditions (2)
- ☐ Noise complaints (3)
- ☐ Unpredictable revenue (4)
- ☐ Unpredictable audience attendance (5)
- ☐ Lack of profits to reinvest (6)
- ☐ Difficulties in getting a loan (7)
- ☐ The seasonality of live music (8)
- ☐ Vulnerable to rent increases (9)
- ☐ Negative reviews or public perception (10)
- ☐ Increased competition from other venues (11)
- ☐ Challenges in attracting talent/artists (12)
- ☐ Issues with staffing or employee retention (13)
- ☐ Changes in local demographics or audience preferences (14)
- ☐ Other (15) _____

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Q15 To what extent do you agree or disagree with the following statements?

	Strongly agree (1)	Somewhat agree (2)	Somewhat disagree (3)	Strongly disagree (4)	I don't know (5)
Music venues and festivals have a responsibility to become more environmentally friendly. (1)	○	○	○	○	○
The live music scene in my city has discrimination problems (e.g. racism, sexism, homophobia). (2)	○	○	○	○	○
The live music scene in my city has corruption problems (e.g. bribes, under-the-table work). (3)	○	○	○	○	○

Q16 What should the government do to help the live music industry in your city?

_____

_____

_____

_____

_____

Q17 What do you think are the main contributions that your live music venue makes to your local area?

_____

_____

_____

_____

_____

Q18 Are you optimistic about the future of your venue?

- Yes (1)
- No (2)
- I don't know (3)

Q19 Would you like to be added to our mailing list and receive the results of our survey?

- Yes - please contact me per e-mail (1)
- No (2)

End of Block: Operating environment and sociocultural impact

Annex IV. Post-snapshot Venue Survey

Start of Block: Block 4

Project Title: European Live Music Census 2024 – Venue Survey

Project Framework: Open Music Europe (OpenMusE) Project, funded by the European Union under Horizon Europe grant no. 101095295

Please read the following information carefully before providing your consent to participate in this survey.

- I am age 18 or over.
- I have read and understood the Project information sheet
- I understand that the data provided will remain confidential and will be used solely for the purposes of this research project.
- I understand that the data provided will not be shared with anyone in a way that could identify my venue.
- I am aware that participation is voluntary and that I can withdraw from the survey at any time without penalty.
- I understand that I have the right to access, correct, object to, or request the deletion of my venue's data.
- I consent to the processing of the data provided in this survey in accordance with the GDPR.

○ By checking this box, I confirm that I am authorized to provide information on behalf of the venue and that I consent to participate in this survey under the terms outlined above. (1)

Q1a Please fill in the following

○ Venue Name (1) _____

○ Representative's Name (2) _____

○ Position (3) _____

○ E-Mail (4) _____

○ Date (5) _____

End of Block: Block 4

Start of Block: Live music events – economic impact

Q1b Please select the city in which your venue is located.

- ○ Heidelberg (1)
- ○ Helsinki (2)
- ○ Lviv (3)
- ○ Mannheim (4)
- ○ Vilnius (5)

Q1c Did your venue host a live music event on Friday, 11 October?

- ○ Yes (1)
- ○ No (2)

Skip To: End of Block If Did your venue host a live music event on Friday, 11 October? = No

Q2 How many live music events did your venue host on Friday, 11 October? For example, if you hosted a gig followed by a club night, this would count as 2 events.

- ○ 1 (1)
- ○ 2 (2)
- ○ 3 (3)
- ○ 4 or more (4)

Q3 What live music event(s) did you host on Friday, 11 October and what was the total audience attendance? Approximate numbers are fine.

Display This Choice:

If How many live music events did your venue host on Friday, 11 October? For example, if you hosted... != 1

Display This Choice:

If How many live music events did your venue host on Friday, 11 October? For example, if you hosted... != 1

And How many live music events did your venue host on Friday, 11 October? For example, if you hosted... != 2

Display This Choice:

If How many live music events did your venue host on Friday, 11 October? For example, if you hosted... = 4 or more

	Name of event (1)	Total audience number for the event (2)
Event 1 (1)		
Display This Choice: *If How many live music events did your venue host on Friday, 11 October? For example, if you hosted... != 1* Event 2 (2)		
Display This Choice: *If How many live music events did your venue host on Friday, 11 October? For example, if you hosted... != 1* *And How many live music events did your venue host on Friday, 11 October? For example, if you hosted... != 2* Event 3 (3)		
Display This Choice: *If How many live music events did your venue host on Friday, 11 October? For example, if you hosted... = 4 or more* Event 4 (4)		

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End of Block: Live music events – economic impact

Start of Block: Block 5

Q4 On average, how many days per week do you stage live music events (including events with featured DJs)? Please tick one.

- ○ Every day (1)
- ○ 6 (2)
- ○ 5 (3)
- ○ 4 (4)
- ○ 3 (5)
- ○ 2 (6)
- ○ 1 (7)
- ○ Less than one per week (8)



Q5 Please estimate the approximate size of your **average audience** for live music by day and season. If your venue often hosts multiple events per day, please consider the total attendance for all events.

For example, on Saturdays in Jan/Feb/Mar your average audience attendance may be 100 people per day/night, but in Oct/Nov/Dec it may be 150 people.

	Sunday through Thursday (1)	Friday (2)	Saturday (3)
Jan/ Feb/ Mar (1)			
Apr/ May/ Jun (2)			
Jul/ Aug/ Sep (3)			
Oct/ Nov/ Dec (4)			

Q6a Compared to the period before COVID, are overall attendances bigger, the same, or lower?

- ○ Bigger (1)
- ○ The Same (2)
- ○ Lower (3)

Q6b Please feel free to comment on the previous question (attendances compared to before COVID).

_____

Display This Question:

If Please select the city in which your venue is located. = Lviv

Q7a Compared to the period before the full-scale Russian invasion of Ukraine in 2022, are overall attendances bigger, the same, or lower?

- ○ Bigger (1)
- ○ The Same (2)
- ○ Lower (3)

Display This Question:

If Please select the city in which your venue is located. = Lviv

Q7b Please feel free to comment on the previous question (attendances compared to before the Russian invasion).

_____

End of Block: Block 5

Start of Block: Live music events in general

Q8 What kinds of live music genres do you most often present? Please tick all that apply.

- ☐ Pop (1)
- ☐ Rock (2)
- ☐ Hip Hop / Rap (3)
- ☐ Dance / Electronic (4)
- ☐ Latin (5)
- ☐ R&B / Soul / Funk (6)
- ☐ Classical / Opera (7)
- ☐ Country (8)
- ☐ Jazz (9)
- ☐ Folk (10)
- ☐ Experimental (11)
- ☐ World Music (12)
- ☐ Reggae / Dub (13)
- ☐ Local traditional folk music (e.g. LOCAL EXAMPLE) (14)
- ☐ Local modern folk music (e.g. LOCAL EXAMPLE) (15)
- ☐ Other (16)

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Q9 Do you present live music events where entrance is paid, donation only, and/or free? Please tick all that apply.

- ☐ Paid (1)
- ☐ Donation only (2)
- ☐ Free (3)

Q10 Do you present live music events that are internally organized, organized by other promoters, or both?

- ○ Only internally organized (1)
- ○ Only organized by other promoters (2)
- ○ Both (3)

*

Q11 Approximately what percentage of your live music performers are from your local area, from elsewhere in your country, and international? Please make sure that the % add up to 100.

Local Area in % : _____ (1)
Elsewhere in country in % : _____ (2)
International in % : _____ (3)

Total : _____

Q12 How do you pay performers? Please tick all that apply.

- ☐ Performers perform for free/for drinks (1)
- ☐ Performers are paid a performance fee (2)
- ☐ Other (in-house artists/residencies, etc.) (3)

Q13 Do you stage or host music festivals?

- ○ Yes, in the main venue (1)
- ○ Yes, elsewhere (2)
- ○ Yes, both in the main venue and elsewhere (3)
- ○ No (4)

End of Block: Live music events in general

Start of Block: Staff

Q14 Is your staff composed of regular employees, freelancers, and/or volunteers? Please tick all that apply.

- ☐ Regular employees (1)
- ☐ Freelancers (2)
- ☐ Volunteers (3)

Page Break

Display This Question:

If Is your staff composed of regular employees, freelancers, and/or volunteers? Please tick all that... = Regular employees

Q15 Total number of regular employees

○ Full-time (1) _____

○ Part-time (2) _____

Display This Question:

If If Total number of regular employees Text Response Is Greater Than 0

*

Q16 Average hours a full-time regular employee works per week

_____

Display This Question:

If If Total number of regular employees Text Response Is Greater Than 0

*

Q17 Average hours a part-time regular employee works per week

_____

Display This Question:

If Is your staff composed of regular employees, freelancers, and/or volunteers? Please tick all that... = Regular employees

*

Q18 Approximately what percentage of your regular employees identify as male, female, or non-binary/other? Please make sure that the % add up to 100.

Male : _____ (1)
Female : _____ (2)
Non-binary / other : _____ (3)

Total : _____

Page Break

Display This Question:

If Is your staff composed of regular employees, freelancers, and/or volunteers? Please tick all that... = Freelancers



Q19 Total number of freelancers which you hire frequently

_____

Page Break

Display This Question:

If Is your staff composed of regular employees, freelancers, and/or volunteers? Please tick all that... = Volunteers



Q20 Total number of volunteers

_____

End of Block: Staff

Start of Block: Income and expenditure



Q21 Total annual revenue **in EUR** (i.e., the total amount of money generated, before taxes and expenses)

_____

Q22 Approximately what percentage of your revenue comes from the following? Please make sure that the % add up to 100.

Ticket sales : _____ (1)
Food and drink sales : _____ (2)
Other revenue : _____ (3)

Total : _____



Q23 Total annual expenditures **in EUR**

_____



Q24 Approximately what percentage of your expenditure goes to the following? Please make sure that the % add up to 100.

Tax : _____ (1)
Rent or mortgage : _____ (2)
Programme costs (artist fees, accommodation, etc.) : _____ (3)
Employment costs : _____ (4)
Infrastructure and utility costs (electricity, etc.) : _____ (5)
Other expenditures : _____ (6)

Total : _____

End of Block: Income and expenditure

Annex V. Selected Video Interview Quotes (Mannheim)

7.1 Cafe Leitstelle

“I understand the artists who say: ‘Hey, we… we need the fee, otherwise it’s not worth the effort for us’. But the same applies on our side, we also have a certain amount of work, especially when it comes to costs. And what we would like most from the government would be easier access to more money. Or in simple terms: more money and less bureaucracy.” (Katharina Wodajo, Manager)

https://www.youtube.com/shorts/kzvaeO7HVxU

7.2 Filmriss Bar

“As a bar, we simply want to promote Mannheim’s talents and give them a stage to show that Mannheim is not necessarily just DJ music […] In general, Mannheim lacks a bit of support for young talents. I think Mannheim’s music scene is a very familiar circle, so there’s actually a strong connection that just needs to be pushed a bit by the city, so there is more open space, or space in general where people can be creative.” (Chris Lösch, Manager)

“I mean… without DJ’s, Mannheim would be less open. No matter what nationality you are, what sexual orientation you have, just be yourself and enjoy the music!” (Ruslan Borzov aka DJ Trashboat)

https://www.youtube.com/watch?v=_gnacxLGZV0

7.3 Jugendkulturzentrum Forum Mannheim

[note: established 1978] “Our focus is on the local, young up-and-coming scene. We have low-threshold programmes, such as a jam session […] Of course we have many challenges in this area. Most of the time, it’s quite classic: space, time, money. Also, young musicians need professional equipment, need professional support. Otherwise, you can’t really take yourself seriously, especially as a City of Music […] Right now, you really have to train and support young people well.” (Rene Seyedi, Manager)

“We’re both originally from Egypt, and I think a bit of international music in Mannheim would be nice. So we also try to play a bit more Arabic. A bit more diversity, I think.” (Two university-age female venue attendees)

https://www.youtube.com/watch?v=d1unfbr0LYE

7.4 Tiffany Mannheim

“Mannheim’s high society comes here, we have upscale people, good-looking people. People come here to have fun and forget about daily life […] After Corona, it was a very, very big problem to get back the young generation who had just turned eighteen, they didn’t even know how to party. Step by step, it’s getting better, but it is more and more difficult to get the crowds into Mannheim. Mannheim describes itself as the city of pop culture or as Germany’s City of Music. Why not bring this more into [city] marketing? Take the clubs into account, take the city vibe into account, so that Mannheim is really perceived as the City of Music! Why isn’t it allowed, or even supported, for musicians to play on the street, so people can say: ‘hey, it’s cool here! I can

drink an Aperol here in the sun in the summertime! Those would be my ideas for the city of Mannheim!" (Maximilian Dierschke, Managing Director)

"This place is 55 years old and it's just unbelievable how cross-generational this club is" (Middle-aged female club attendee)

https://www.youtube.com/watch?v=Od32TNL4fd4

7.5 Kazwoo Jazz-Café-Bar

"So eventually it would be an improvement if the funding in Germany didn't go through the organisers, but directly to the musicians. That would significantly minimise the risk for us organisers." (Thomas Schäffner, Owner)

"There are definitely quite a few places in Mannheim where you can listen to jazz music. I would like there to be even more places, maybe more clubs or more concert venues where people can try out new things" (Noah Dima, 22-year-old jazz piano student from Stuttgart)

https://www.youtube.com/watch?v=TvVmdP34CT8&pp=0gcJCccJAYcqIYzv