LIVE Annual Report & Economic Highlights 2025

Live music Industry Venues and Entertainment

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Contents

Welcome to the *LIVE Annual Report & Economic Highlights 2025*

2025 was another strong year for live music as we once again demonstrated our unique ability to reach all parts of the UK. With one gig every 136 seconds – shaving a second off the previous year's figure – just **10%** of the public not thinking about attending a gig, and a strong sector growth rate, we are uniquely placed to drive growth and deliver joy across the country.

For LIVE, 2025 saw us further entrench our position as a trusted partner of government, working on a host of issues from ticket touts, counter terrorism and A1 forms to business rates, visas and major events. LIVE worked with multiple departments and gave evidence in Parliament on multiple occasions. At all times, we seek to be an expert and constructive partner and this is reflected in our reputation across Westminster and Whitehall.

Specifically, the 2025 figures underline why Government included us in their Industrial Strategy, Creative Industries Sector Plan and the forthcoming Music Plan and Major Events Strategy. Live music drives the high street and local and regional economies, which means we are also in demand as a partner of Metro Mayors.

Concerts continue to pull in big numbers, driven by the increasing roster of arena and stadia shows. In fact, it is often said in the LIVE offices – with tongue only part in cheek – that Wembley Stadium is a gig venue that puts on the odd football match. It is also pleasing to see decent growth for festivals, after a fairly flat 2024. That said, we should note that value growth does not automatically mean increased profits. Cost pressures are all too real, with global events disrupting supply chains and driving up energy prices. Government policy – notably the changes to employer NICs – have piled more pressure on venues and compromised job numbers.

As in previous years, we should also recognise that growth has not been uniform across live music in the UK. With grassroots venues, artists, promoters, festivals and more all under pressure, it was all the more important that we made progress with LIVE Trust. In a matter of months, we moved from formation to grant making while driving adoption of the £1 contribution from ticket sales. We are rightly proud of the Trust's accomplishments to date and excited about its future potential.

As these figures show, we can be a driver of growth in all regions, towns and cities across the country. Live music is a joyous experience and the desire to attend gigs remains strong, among both Brits and international visitors. Our sector is vibrant and culturally essential, but its long term stability will depend on how effectively we, as an industry, with Government at our side, protect and nurture the ecosystem.

Jon Collins, CEO, Live

The value of
Live Music

Last year's UK Live Music report highlighted one of the best years yet for the sector – but even that performance was put in the shade by a stellar 2025.

Our data for this report puts the total consumer spend driven by live music at **£7.6 bn**. This is a remarkable year-on-year increase of **12.9%**, and **44.7%** more than in 2022. It's also **67.7%** above the pre-COVID benchmark of 2019 – equivalent to more than **£3bn** in extra spend.

A bounceback in spending after the pandemic was widely expected. But these figures show the release of pent-up demand has been sustained, with UK consumers wholeheartedly embracing the live music experiences that they missed so much during venue and festival closures.

Smash hits and hidden gems

They also reflect a blockbuster year of live music in 2025. The highest profile event of the year was the reunion tour of Oasis, who played 19 huge shows between July and September. Various estimates put the value of that tour at around **£1bn**, with Barclays calculating that fans spent an average of **£766** each on tickets, travel, accommodation and other expenses.

Other major tours came from artists including Coldplay, Dua Lipa, Billie Eilish and many more. They all made it another excellent year for pop and rock, and for stadia and the top tier of arenas, which achieved some of the biggest grossing dates in their history. But beyond those headline names were an impressively long tail of other genres and artists who showed the massive diversity of music in the UK (see page 6). While cities benefited most from the big shows, the gains were also felt across the country (see page 5). Though it must be noted that a contraction in the touring circuit means those benefits are not spreading as widely as they could.

Festivals Kick On

Oasis and others meant that concerts generated **76.3%** of live music revenue in 2025, and this share has risen by 3 percentage points in the last two years. However, year-on-year revenue growth for festivals was still well above inflation at **8.3%**, despite consolidation in festival numbers.

While the increase in large scale outdoor and stadia shows might compete for spend from some consumers, these figures, with revenue now back above the pre-COVID levels of 2019, indicate that the sheer range and diversity of festivals on offer means that festivals and concerts can complement rather than cannibalise.

Challenges continue

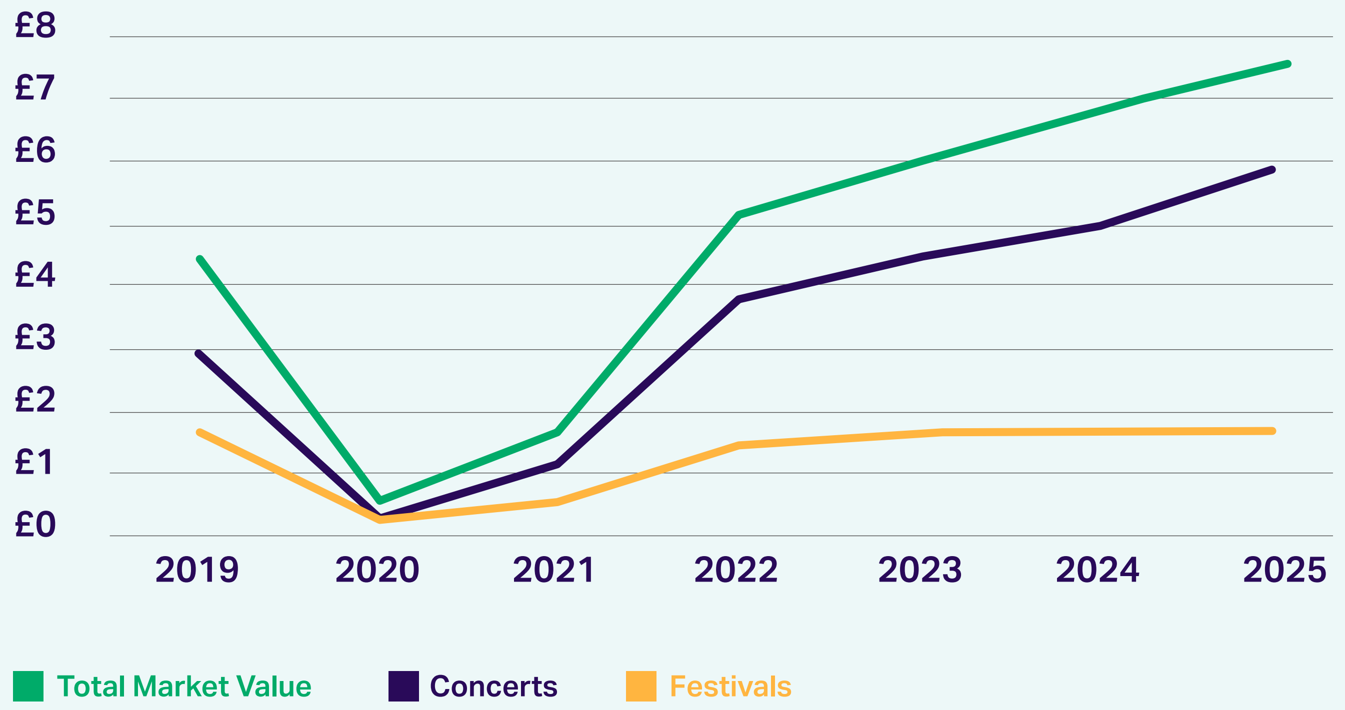
There are a couple of caveats to the success story of 2025. One is that while many big music venues flourished, conditions for smaller, grassroots sites were more challenging. With less insulation against cost inflation, and smaller wiggle room on pricing, it was much harder for these venues to turn a profit. It's been a similar picture for smaller festivals, which can find it tougher to absorb higher costs or compete with big outdoor events. The struggles of live venues and festivals have a knock-on effect for up-and-coming artists as well.

	2019	2020	2021	2022	2023	2024	2025	2025 v 2024	Share
Total market value	£4.5	£0.6	£1.8	£5.2	£6.1	£6.7	£7.6	+12.9%	
Concerts	£2.9	£0.4	£1.2	£3.8	£4.5	£5.0	£5.8	+14.4%	76.3%
Festivals	£1.6	£0.2	£0.6	£1.5	£1.6	£1.7	£1.8	+8.3%	23.7%

It's been encouraging to see support for these grassroots venues, especially through the LIVE Trust's campaign to protect independent venues, artists, festivals and promoters, which is backed by Harry Styles, Olivia Dean and a host of other tours.

The second caveat is that some of the growth has been fuelled by inflation, which has forced operators to increase ticket prices. However, with the Consumer Prices Index showing a headline rate of inflation of **3.4%** in 2025, it's clear that a significant element of the extra spend came from a compelling line-up of artists and higher volumes rather than higher prices.

Live music spend, 2019 to 2025 (£bn)



£7.6bn
Total spend driven by concerts and festivals in 2025

12.9%
Year-on-year increase in total market spend

68.9%
Increase in total market spend since 2019

Spend by place

Analysis for the **UK Live Music 2025** reveals how England and London dominate revenue in the sector.

England earned **84.3%** of all live music income last year – up slightly from 2024. Scotland is next, with a **9.2%** share, while Wales has a **3.8%** slice (see table).

These splits are roughly in line with each country's share of the UK population. But London's earnings are significantly outsized. The Greater London region attracted **32.8%** of live music spend in 2025, against an estimated **13%** share of the UK's population as a whole. Its proportion of spend increased sharply year-on-year by **3.9** percentage points, pulling some money from other parts of the country (see table).

London's exceptional performance reflects its standing as the priority destination for music artists, especially those visiting from overseas. An increasing number of them are booking in for long residencies rather than one-off performances, which is sustaining spend over weeks rather than days. London is also an easy and attractive destination for people from further afield. Many of them are staying over before and after concerts, which means they are generating substantial revenue for the hospitality sector as well as venues and artists.

While Wembley Stadium was London's biggest component of sales (see box), multiple arena, dedicated music venues and countless gigs in pubs and bars all played their part in the standout year. The capital has many more venues and concert-goers than anywhere else, and the relatively high disposable income of its population is yet another advantage.

The capital now generates more than three times the live music spend of any other city in the UK (see table). Next on the list is Manchester, which increased its share by more than **1** percentage point to **9.4%**. Big gigs at the Etihad and Old Trafford stadia helped, as did the first full year for the Co-op Live arena adding to the region's pull alongside the AO arena. Another renowned music city, Glasgow, is in third, taking **4.9%** of sales, though its share dropped a little year-on-year. Edinburgh is a notable climber in the top ten, overtaking Liverpool.

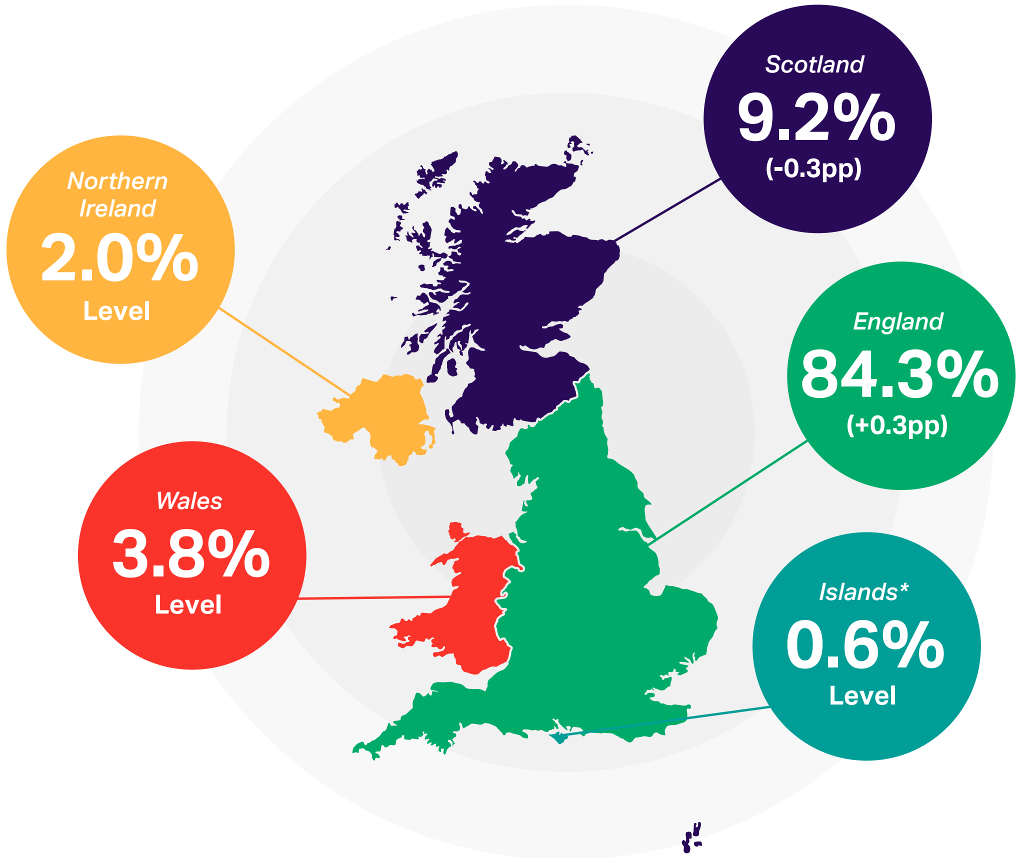
When combined, the top five cities attracted more than half (**51.4%**) of all live music spend last year. This is **5** percentage points more than in 2024, and illustrates how fans were drawn to big music hubs – sometimes at the expense of venues in smaller cities and towns that are off the main touring circuit for major artists. Nevertheless, there were strong numbers from more rural parts of the country, especially in regions like Central and South Western England. Festivals deliver a much bigger part of spend here, and help to ensure that live music is within reach of consumers in all parts of the UK.

Wembley's smash-hit year

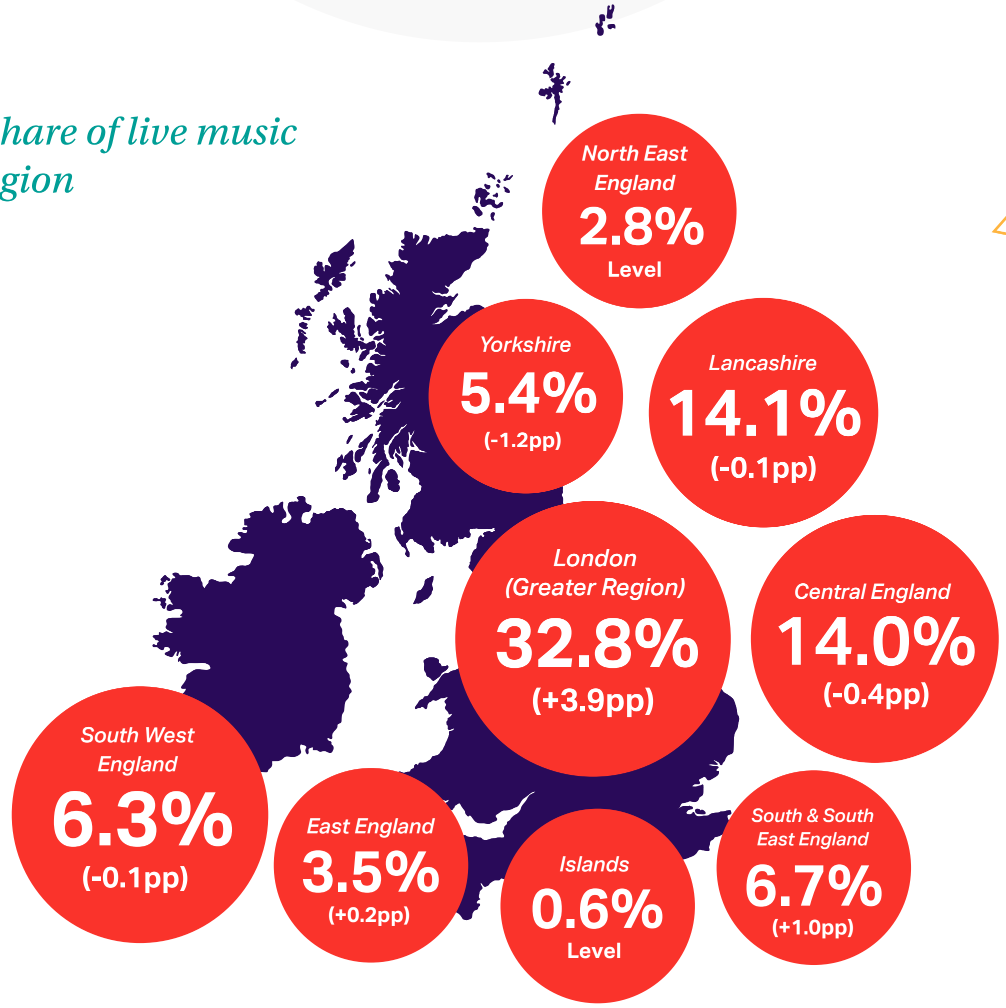
In a great year for London's live music sector, there's one venue that stands out: Wembley Stadium. It delivered 26 concerts between June and September 2025 – the most in its history. They brought in more than two million people, around a quarter of them to Oasis' seven performances there. Meanwhile Coldplay had a ten-date run, and there were big nights from Dua Lipa, Lana Del Rey, Blackpink, Guns n Roses and Linkin Park.

Wembley's line-up is now such that many consumers identify with it as more of a live music stadium than a sporting one. Another big roster of visiting artists in 2026, including 12 nights for Harry Styles, six for Bruno Mars and five for The Weeknd, mean it's set to have another exceptional year.

Share of live music spend by country



England's share of live music spend by region



Numbers in brackets indicate year-on-year change in share. *Islands include Isle of Man, Isle of Wight, Jersey and Guernsey

Share of live music spend by city: top ten

	City	Share of revenue
1	London (Central)	30.7% (+4.2pp)
2	Manchester	9.4% (+1.3pp)
3	Glasgow	4.9% (-0.8pp)
4	Birmingham	3.7% (-0.2pp)
5	Cardiff	2.7% (-0.3pp)
6	Edinburgh	2.3% (+ 0.4pp)
7=	Belfast	1.8% (level)
7=	Liverpool	1.6% (-0.5pp)
9	Nottingham	1.5% (level)
10	Bristol	1.4% (-0.5pp)

Numbers in brackets indicate year-on-year change in share.

Spend by genre

Pop and indie music continue to dominate the live music scene in the UK – but beyond those two are an array of genres that show the remarkable diversity of the sector.

Pop attracted nearly 29 pence in every pound spent on live music in 2025 (see table). It's the most popular genre by some distance, but indie closed the gap last year, lifting its share of spend by **5.3** percentage points to **20.0%**. A big chunk of this was generated by Oasis, whose mega tour of the UK was the biggest music story of the year.

Other standout genres from 2025 include alt rock and rap, which grew their share by **4.2** and **2.8** percentage points respectively. R&B was another notable gainer, following sell-out stadia concerts from Beyonce. Metal nearly doubled its share, thanks in part to a big tour from Iron Maiden.

Another genre making strides up the chart was K-Pop. Ranked 14th in last year's report, it has now made the top ten after Wembley Stadium events for the SM Town collective and Blackpink, and visits from Ateez and others. A first UK visit in seven years for BTS could make 2026 an even bigger year for K-Pop.

Just outside the top ten are a host of other genres that enjoyed popularity last year, including country, folk and nu-metal. There's so much more besides, including nu-metal, reggae, soul, Bollywood, ska and funk. Genres to watch in 2026 include C-Pop, J-Pop and Afrobeat.

This tapestry of genres emphasises the variety of live music that is available to consumers. Many operate in niches with limited venues and audiences, but while individual contributions are small, they add up to a sizeable part of the market. They also create the rich diversity that makes the UK live music scene so special.

The vital cultural role of these genres is another reason why the live music sector deserves support. While spending figures may be up, the business realities for many artists, festivals, venues and other stakeholders in these niches remain difficult. Ticket sales are good, but high costs mean profits are much harder to come by, especially in the country's smallest venues. The closure of some grassroot sites, and the trimming of tours by some artists who can't make them pay, are two warning signs of the challenges facing the sector. Financial backing is essential in order to preserve the phenomenal diversity of the UK's live music scene.

Share of live music spend by genre: top ten

Genre of artists at the top 2,000 events of 2025 by revenue

	Genre	Share of spend	Year-on-year percentage point
1	Pop	28.7%	-3.4
2	Indie	20.0%	+5.3
3	Alt Rock	7.9%	+4.2
4	Rap	6.0%	+2.8
5	Electronic	5.7%	-3.4
6	R&B	5.4%	+1.8
7	Rock	5.1%	-8.4
8	Classical	3.8%	+0.2
9	Metal	3.4%	+1.8
10	K-Pop	2.3%	+1.5

28.7%

Percentage of total spend relating to pop music in 2025

20.0%

Percentage of total spend relating to indie music in 2025

7.9%

Percentage of total spend relating to alt rock music in 2025

Live music employment

Live music is a vital source of rewarding and flexible employment, but its ability to create jobs is under pressure from a heavy burden of costs.

Those are the takeaways from the latest employment estimates, which put the total number of jobs in the sector at 234,456. Around one in five (**21.1%**) of these roles is permanent, providing people with stimulating work and the chance to build long-term careers in the world of live music. Four in five (**78.9%**) are casual jobs, which can give individuals the freedom to work temporarily, and in shifts that suit them. In both cases, the sector is particularly attractive to younger adults, giving thousands their first taste of work.

Employment figures are now significantly higher than in 2019, before COVID-19 caused havoc for live music and its workforce. They are also just above the levels of two years ago. However, 2025 saw total jobs contract by **0.1%** from 2024 – the first year-on-year drop since live music was reignited after the pandemic.

This is a sharp contrast with the double-digit growth in the value of the live music sector (see page 4). On one hand, it points to the productivity of businesses and the labour efficiencies they have found. But it also shows how very high employment costs are forcing businesses to take difficult decisions on hiring.

Increases to the National Minimum Wage and National Living Wage have steadily pushed up pay in recent years, and 2025's hike was particularly significant. The impact was worsened by an increase from April to employers' National Insurance Contributions.

These new costs have been piled on top of mounting expenses in other areas, including business rates, which prompted operators to make cuts to staffing levels or freeze recruitment. While the government provided some respite with a partial review of rates in early 2026, it was too late for employers that had projected higher costs and adjusted personnel accordingly. Smaller venues and festivals, where pay often accounts for a much larger proportion of operating costs, have been hardest hit. It can also be tougher for these employers to recover the extra expenses by raising ticket prices at a time when many music fans are strapped for cash.

High labour costs are clearly hurting the music sector's ability to invest in people. Since permanent roles have dropped by **-0.6%**, while the number of casual roles has increased by **0.1%**, it's apparent that businesses are having to trim their full-time personnel, and rely more heavily on temporary, freelance, self-employed and agency staff.

Challenges have stretched into 2026, after yet more increases to the National Minimum and Living Wages this April. At the start of the year, the Business Confidence Survey from NIQ and Zonal found that nearly nine in ten (**88%**) leaders were worried about increased employment costs, and that many were cutting team numbers or reducing hours.

The employment costs crisis has intensified calls for intervention through measures like adjustments to National Insurance contributions and more sustainable increases in Minimum and Living Wage levels. Better support would allow the live music sector to invest more freely in the permanent and casual jobs that are so important to UK workers and the economy.

Live music employment, 2019 to 2025

	2019	2020	2021	2022	2023	2024	2025	2025 v 2024	Share
Total	210,000	-	180,600	228,340	229,683	234,630	234,456	-0.1%	-
Permanent	52,000	-	44,720	51,696	49,357	49,730	49,456	-0.6%	21.1%
Casual	158,000	-	135,880	176,644	180,287	184,900	185,000	0.1%	78.9%

LIVE insights:
Audience behaviour and ticketing confusion

The sixth wave of LIVE's national audience research, delivered in partnership with Skiddle, gives one of the clearest pictures to date of how UK gig goers are behaving. Based on a representative sample of 2,000 people, the study tracked audience trends that emerged after the Covid-19 lockdown, including later ticket purchasing, fluctuating no show rates and generational differences, as well as the impacts of the cost of living crisis.

The latest research again highlights how live music is deeply embedded in UK culture. Just **10%** of the population say they aren't thinking about attending live music, and only 9% are going to fewer events, despite rising costs. However, this figure rises to 18% among 18 to 24 year-olds, which highlights the need to support engagement among younger audiences.

The research shows how economic pressures continue to shape behaviour. Just over a quarter (**27%**) of respondents feel 'everything is expensive' – the joint highest proportion on record. Meanwhile **15%** to **20%** of respondents report barriers to attending as many shows as they would like, such as reduced energy (**19%** nationally, rising to **25%** among 18 to 24 year-olds) and the effort needed to travel (**16%** nationally, rising to **21%** in London).

Ticket usage has stabilised after post lockdown volatility. Three in five (**62%**) say they always use their tickets, though this drops sharply to **42%** among 18 to 24 year-olds and rises to **75%** in Liverpool. Non usage reasons vary, from selling tickets (**8%**) to forgetting (**6%**) to not being bothered (**8%**) to the night out being too expensive (**4%**). All these behaviours are significantly more common among younger adults and Londoners, and genre specific patterns add colour. For example, metal fans are the most entrepreneurial, with **26%** having sold tickets; while house music fans are the most forgetful, with **17%** having forgotten to use a ticket. The research also explores ticketing and secondary ticketing and reveals strong support for government intervention. Only **12%** of consumers want no cap on resale prices – a timely reminder for government as it considers the next steps on the Ticket Touts Ban Bill. Yet confusion persists. Many consumers have difficulty understanding the difference between the primary and secondary markets, which leaves them exposed to touts. This situation is exacerbated by search engine placement for secondary sites.

Overall, the survey paints a largely positive picture. While economic pressures persist and generational differences are apparent, interest in live music remains high, early buying is rising, and there's clear public backing for ticketing reform.

LIVE's expert groups

Sitting beneath the LIVE Board, LIVE's expert groups meet bi-monthly and offer a unique opportunity for 360-degree consideration of issues of the day.

LIVE Festivals (Chair: Liz Madden, NoNonsense Group)

This is the only group that brings together stakeholders from across the UK festival sector including major and independent festivals, suppliers and policy experts.

In 2025, LIVE Festivals focused on opportunities to strengthen the UK's festival ecosystem amid economic pressure, political scrutiny and major regulatory change. The group worked across a number of fronts including the LIVE Trust, policy engagement, sector guidance and long term strategic development.

A top priority was helping to shape the development of the LIVE Trust. Festivals are one of the four central pillars of grassroots music to be supported by the Trust, and discussion focused on both how support could best be offered, and ways in which festivals could help with fundraising. Festivals support grassroots music by hosting new music stages, developing supply chains and many more activities. But with festival economics difficult, risk levels high and margins squeezed since COVID, their ability to support can be limited.

LIVE Festivals informed LIVE's work with government on the Terrorism (Protection of Premises) Bill throughout 2025. The group raised the industry's concerns about issues such as proportionality, broad inspectorate powers and the lack of an adequate appeals process. In addition, the group flagged how, while the legislation was not coming in to force until at least 2027, consultants are selling 'compliance' and councils are requesting evidence of how plans would sit against Martyn's Law. The group also contributed to the government's work on legislation to ban ticket touts, offered examples of visa uncertainty for international artists, and noted the negative impact of post-Brexit arrangements with the European Union.

The group has worked hard to support improved industry standards and guidance. It promoted the Attitude is Everything – Live Events Access Charter, encouraged wider festival adoption, and fed into the development of The Show Must Go On report. Hearing health initiative Listen for Life was also introduced.

LIVE Festivals also informed LIVE's work on the Major Events inquiry held by the Culture, Media and Sport Committee, noting how we could contribute much more if we had a more stable and enabling operating environment. That in turn supported our work on improvements to festival licensing and the Association of Independent Festivals' plans for a festival tax relief – an enabling relief that would encourage investment and risk-taking.

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LIVE Green (Chair: Carol Scott, TAIT)

In 2025, LIVE Green continued its excellent convening role, bringing sustainability specialists and live music professionals together to accelerate work across the sector through research, standard setting, industry coordination and practical pilots. This was shown in work on decarbonisation, power and energy transition, climate resilience and industry standards and reporting.

LIVE Green played a central role in shaping major research outputs, including direct and indirect work on the third iteration of The Show Must Go On climate transition plan, modelling emissions from 55 festivals and identifying high impact decarbonisation measures. Members also contributed to the Green Events Code of Practice (GECoP), which entered its second phase with local authority pilots showing an 83% improvement in understanding and a **60%** rate of adoption of new measures.

LIVE Green provided a natural place to consider the steps needed to shift festivals and venues away from diesel fuel. The group was delighted to support A Greener Future's Low Emissions Festival Report, highlighting the need for accurate power specifications, increased battery use and reduced HVO reliance. We also championed the Ecotricity Business LEES scheme in partnership with LIVE and MVT, enabling venues to access greener tariffs at improved rates. A landmark case study, showcasing the industry's commitment to action, came from AEG's overview of their work at LIDO Festival, which used a range of sustainability initiatives to cut HVO use and drive up rates of recycling and composting.

With extreme weather escalating, LIVE Green considered climate mitigation and the impact of real-world incidents, and began a collaboration with the Met Office to gather impact data and develop guidance. Looking ahead, the group prepared for future reporting requirements, including EU EcoDesign rules, digital product passports and UK sustainability disclosure frameworks. Work was also scoped on standardising carbon reporting tools and ensuring scalability for grassroots organisations.

LIVE Touring (Chair: Dave Webster, Musicians' Union)

Throughout 2025, LIVE's government engagement worked intensively to address the major barriers facing UK artists, crews and promoters when touring internationally. The group focused on three key areas: touring in the European Union, inbound UK visa and border issues, and touring challenges in the US. It also supported government engagement and sector wide coordination.

LIVE Touring played a central role in the sector's input into discussions between the UK and EU ahead of the May 2025 Summit. Members worked with government departments and the Domestic Advisory Group (DAG) to develop detailed proposals on visas, cabotage, carnets, movement of goods and the 90/180 day rule. The group contributed to the DAG mobility paper and coordinated industry evidence for government.

Another major strand of work was the launch and expansion of the Cultural Exchange Coalition (CEC) alongside UK Music and the Musicians' Union, which grew to more than 120 organisations across 17 EU member states. The CEC organised EU facing advocacy, including an open letter signed by 228 EU cultural organisations, and began plans for a major Brussels event in 2026. Members also engaged with the EU/UK Cultural Forum and the Parliamentary Partnership Assembly, where EU touring barriers were debated.

The LIVE Touring group repeatedly raised urgent concerns with the Department for Culture, Media and Sport, the Home Office and UK Visas and Immigration about inbound visa and border issues. These included visa refusals based on the subjective 'unique contribution to creative life in the UK' test; the suspension of sponsor licences; and Electronic Travel Authorisation rules triggering refusals for artists with past convictions. Ongoing confusion around the PPE route, Certificates of Sponsorship and inconsistent Border Force practices were also raised. In light of this, LIVE Touring pushed for the reinstatement of a formal UKVI engagement group and prepared briefing materials for parliamentarians and All-Party Parliamentary Groups.

Members monitored tightening US border enforcement, increased visa delays, more requests for evidence and concerns about device searches and social media scrutiny. They also tracked potential US tariffs on merchandise and advised on carnet use.

Looking at technical and operational issues, the group examined A1 forms, the French ELO merchandise requirement, the rollout of the EU Entry/Exit System (EES) and the upcoming digital eATA carnets.

LIVE Venues (Chair: Dom Stokes, Utilita Arena and Sheffield City Hall)

LIVE Venues provides coordinated advocacy, intelligence sharing and sector leadership across policy, regulation, safety, sustainability and industry practice. It plays a central role in coordinating the live music sector's response to major policy, regulatory and operational challenges.

Across its 2025 meetings, the group focused heavily on the development and implementation of the LIVE Trust. Members discussed progress on tours adopting the £1 ticket contribution, noting that early uptake remained below **10%** of all tickets on sale, and emphasised the need for expansion to avoid the risk of a statutory levy. They also called on government to either exempt the £1 from VAT or return monies raised to the Trust. Government should not be one of the biggest beneficiaries of this work.

LIVE Venues also provided expert participants in support of the joint DCMS and DBT Licensing Sprint, a fast paced expert review of licensing rules, recommending a national licensing framework, an amnesty for low impact conditions, and stronger evidence requirements for complaints. The group highlighted how inconsistent local approaches can trigger costly formal processes.

LIVE Venues also fed in to LIVE's work on the Terrorism (Protection of Premises) Act, preparing for future guidance and inspectorate processes. Members have helped shape guidance and emphasised the need to align requirements with existing venue practices.

Business rates reform was another major focus. LIVE, working with the National Arenas Association and Music Venue Trust, prepared submissions warning that proposed multipliers for properties over £500,000 could force venues out of business. Members stressed that the Valuation Office Agency's valuation methods risk penalising venues that contribute to cultural regeneration.

LIVE Venues also addressed operational risks from new visa and ETA rules, which create uncertainty for touring artists due to late application windows and stricter refusal criteria. The group additionally explored sustainability through the Ecotricity Business Live Events Energy Scheme, discussed hearing health initiatives via the World Health Organisation supported Listen for Life campaign, and shared trading updates across the UK.

LIVE Workforce (Chair: Charisse Beaumont, Black Lives in Music)

LIVE Workforce brings together organisations across the live music ecosystem to improve equity, inclusion, safety, skills and wellbeing for the sector's workforce. In 2025, the group focused on platforming initiatives that strengthen pathways into the industry, support under represented groups, and raise professional standards.

A major strand of work involves showcasing organisations that are driving equitable access to music careers. Sound and Music presented its Fair Access Principles, adopted by 35+ organisations, and described programmes such as In the Making and In Motion, which support young and emerging artists from under represented backgrounds. EventMasters introduced its affordable CPD accredited training platform that is designed to close knowledge gaps for new entrants, offering modules on production, logistics, sustainability and more.

LIVE Workforce also highlights initiatives that tackle structural inequities. Women in CTRL presented the Amplify Apprenticeship Scheme with Amazon Music, which provides paid placements for under represented groups; five of the six first cohort apprentices remained in the industry, demonstrating a direct talent pipeline. AIP shared findings from its diversity report and outlined its forthcoming Diversity Database, developed with LIVE, Black Lives in Music, UK Music and others, to map representation across promoters and support under represented communities.

Safety and wellbeing are core priorities. Music Guardians outlined safeguarding protocols for 16 to 25 year olds entering the industry, addressing risks such as power imbalances, financial instability and lack of pastoral support. Music Minds Matter presented its Allyship programme, offering counselling, peer support groups and tailored workshops to improve mental health across the sector. Attitude is Everything launched its revised Access Charter, providing toolkits for venues and festivals to improve accessibility for artists and audiences.

LIVE Workforce also supports sector wide anti racism work. Black Lives in Music's REMEL survey was promoted to gather evidence of racial profiling in licensing, addressing the legacy of discriminatory practices such as the former 696 form. Additional work included promotion of the Production Service Association's training bursary scheme and support for childcare provision at festivals through Parents and Carers in Performing Arts. Overall, LIVE Workforce acts as a convening force, strengthening inclusion, safety, skills and wellbeing across the live music workforce.

LIVE Talks

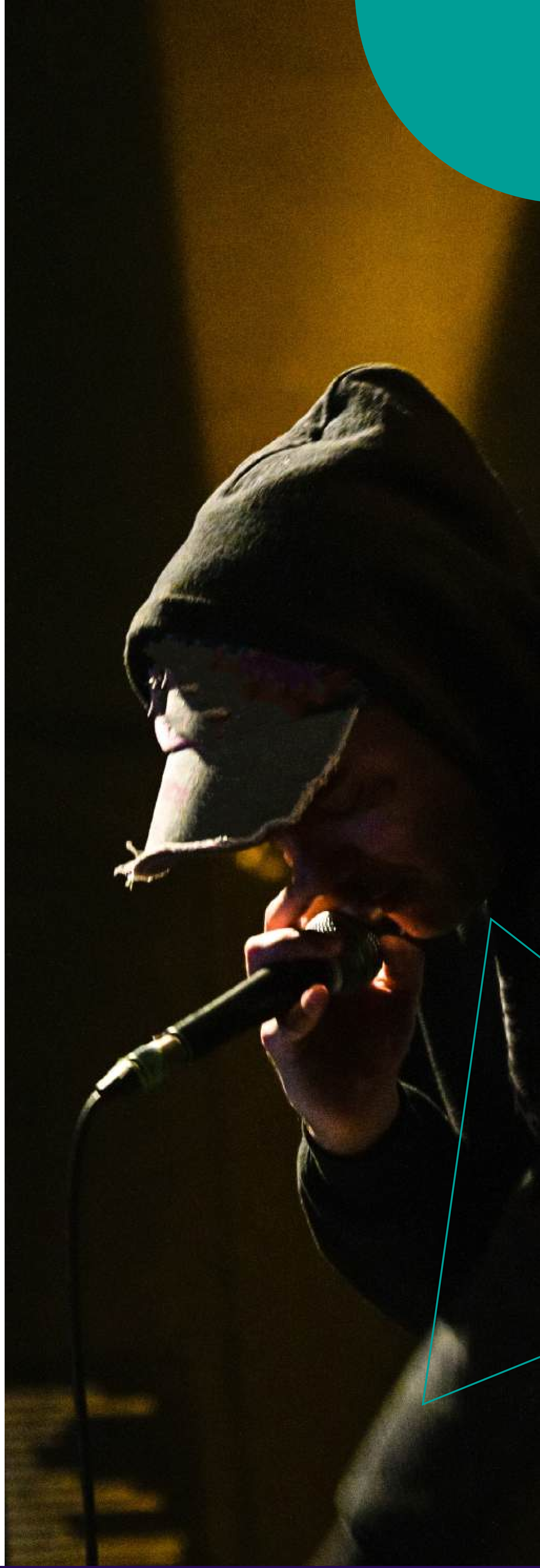
LIVE Talks played an increasingly important role in the LIVE ecosystem across 2025, acting as a sector wide forum for learning, awareness raising and cultural change across the live music industry. Designed to spotlight issues affecting the workforce and the wider sector, LIVE Talks provided structured opportunities for organisations, experts and practitioners to share knowledge, challenge norms and strengthen collective understanding.

A major focus of the 2025 programme was workplace wellbeing and inclusion. Early in the year, LIVE hosted a session on menstrual health, which became a reference point in later meetings for its impact on female and male attendees alike. Building on this, LIVE held a session on menopause in live music, deepening understanding of why women may leave the industry, highlighting the lived experiences of menopausal women working in live music, and encouraging men to act as allies. The session was a must-watch, full of valuable insights to support the shaping of more empathetic and informed workplace cultures.

LIVE Talks also served as a platform for sustainability and climate action. In partnership with Ecotricity Business, LIVE delivered two talks during the year, offering venues and organisations expert guidance on renewable energy, decarbonisation strategies and innovations such as energy baskets and on site generation. These sessions support the sector's transition to greener operations.

Across 2025, LIVE Talks demonstrated LIVE's commitment to convening the sector around emerging challenges, workforce needs and long term cultural change. By spotlighting under discussed issues, from menopause to renewable energy, the programme strengthened shared understanding, encouraged practical action and helped shape a more inclusive, resilient and forward looking live music industry.

All LIVE Talks sessions can be found on the LIVE website at **www.livemusic.biz**.



LIVE Trust

2025 was a transformational year for LIVE Trust, beginning with its launch and ending with the announcement of the distribution of the first monies raised. A huge amount of ground was covered by a small team with a commitment to speed and agility.

Set up with rigour and an eye on the long term, the LIVE Trust exists to protect, expand and support grassroots music across the UK. By collecting a £1 contribution per ticket sold on shows above 5,000 capacity, LIVE Trust supports cross-sector programmes that deliver long-term positive impact for grassroots music.

With more than 100 artists and 400 shows now contributing, supporting the Trust is increasingly the norm for live music in the UK. Adoption has come from all genres and both domestic and international artists.

The Trust's work is guided, informed and led by a strong set of trustees:

- Chair: Kirsty McShannon, founder and CEO of Azorra
- Adem Holness, Head of Music at SXSW London
- David Jones, ex-founding director of Serious and co-founder of EFG London Jazz Festival
- David Laing, ex-Head of Arts, Music and Cultural Venues at Glasgow Life
- Estelle Wilkinson, artist manager
- James Ainscough, Chief Executive at the Royal Albert Hall
- John Cornwell, promoter and a Director at SJM Concerts
- Simon Rix, performing artist with Kaiser Chiefs
- Steve Lamacq of BBC 6 Music and Chair of LIVE
- Victoria Smith, Finance Director and Shareholder at Ghostwriter Consultancy and Events
- Wendy Smith, Creative Director at The Glasshouse International Centre for Music and performing artist

Trustees have established a set of five objectives to inform the Trust's work:

Reduce Costs: Provide targeted support to ease financial pressures by providing emergency relief and investment in sustainable growth.

Expertise and Networks: Support programmes that strengthen peer-to-peer networks, learning, professional advice and collaborative ways of working to build resilience across the sector.

Invest in Infrastructure: Fund improvements in physical, digital and organisational capacity, from equipment and accessible facilities to artist accommodation, policies, insurance and health and safety standards to create safer, more inclusive environments.

Nurture Emerging Talent: Invest in the next generation of on and off stage live industry talent, supporting creatives at the start of their careers to help them enter and thrive in the live music economy and protect its future.

Support Risk-Takers: Fund venues, artists, promoters and festivals to experiment, innovate and expand the range of live music experiences available to audiences across the UK.

Your support

Pledging just £1 per ticket directly supports organisations working in the grassroots sector that provide vital support across the UK.

We provide grants to organisations that are creating strong networks for everyone across the sector, as well as safer, more inclusive and professional environments for everyone. LIVE Trust funding gives organisations the chance to work directly with performers, crew, promoters, venues, festivals and more, creating a sustainable pipeline of talent on and off stage and fostering innovation and diversity of programming. Long-term, the Trust is seeking solutions that create greater financial resilience across the board for the grassroots sector and those working in it, reducing exposure to escalating costs.

About the report and acknowledgements

About the research

Analysis for this report combines LIVE's experience in the live music sector with the research capabilities of NIQ. LIVE and NIQ liaised with operators, associations, music licensing bodies and ticketing agencies to agree an approach to valuation that focuses on core live music. Combining data from these key stakeholders and NIQ's own proprietary hospitality research sources created a robust model for the calculation of the revenue and employment of the sector. Revenue is based on data from more than 55,000 gigs, concerts, festivals and events where music was a core part of the entertainment, and captures box office income, venue spend and spend immediately before and after attending events.

The value of the live music sector extends well beyond measurable revenue and employment sources. It does not capture the contribution of the myriad events that take place in pubs and bars across the UK, incidental music like open mic nights, live background music, unticketed bands or DJ sets or karaoke, and the grey area of arts and other festivals that have a large musical element. This means that while these figures are accurate and impressive indicators of the core live music sector, there is even more value out there.

Live music
Industry
Venues and
Entertainment

Acknowledgements

LIVE would like to thank all the members, operators, associations, PRS for Music, ticketing agencies and others who supported this report with data and insights.

LIVE's membership includes:

Association of British Orchestras (ABO)
Association of Independent Festivals (AIF)
Association for Electronic Music (AFEM)
Association of Independent Promoters (AIP)
British Association of Concert Halls (BACH)
Concert Promoters Association (CPA)
Entertainment Agents' Association (TEAA)
Featured Artists Coalition (FAC)
Musicians' Union (MU)
Music Venue Trust (MVT)
Music Managers Forum (MMF)
National Arenas Association (NAA)
Production Services Association (PSA)
Society of Ticket Agents and Retailers (STAR)

NIQ

NielsenIQ (NYSE: NIQ) is a leading consumer intelligence company, delivering the most complete and trusted understanding of consumer buying behavior and revealing new pathways to growth. By combining an unmatched global data footprint and granular consumer and retail measurement with decades of AI modeling expertise, NIQ builds decision systems that help companies turn complex data into confident action.

With operations in more than 90 countries, NIQ covers approximately **82%** of the world's population and more than **$7.4** trillion in global consumer spend. Through cloud-based platforms, advanced analytics and AI-driven insights, NIQ delivers The Full View™—helping brands and retailers understand what consumers buy, why they buy it, and what to do next.

For more information, please visit **www.niq.com**

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