LIVE Annual Report & Economic Highlights 2024

Live music Industry Venues and Entertainment

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Contents

Welcome to the *LIVE Annual Report & Economic Highlights 2024*

2024 was a standout year for LIVE as we took our seat at the top table of Government. In the UK live music sector, meanwhile, we continued the post-lockdown trend of strong performance for the biggest names at the biggest venues, while pressure built across our grassroots as venues closed, tours were cancelled or cut back and festivals called time.

Domestic and international artists delivered a Brat summer, rebranded cities as Taylor Towns and offered up powerful homecoming shows. The likes of Taylor Swift, Charli XCX, Bruce Springsteen, Sam Fender and Dua Lipa drew a record 23.5 million music tourists to concerts and festivals in the UK, according to UK Music, and the announcement that Oasis were reforming led to unprecedented levels of interest in their on-sale, with seemingly every Member of Parliament in the queue as the entire country sought to get their hands on those coveted tickets.

Remarkably, setlist data from PRS for Music suggests there was one gig every 137 seconds across the UK in 2024—about the same amount of time it would take to listen to 'Blitzkrieg Bop' by The Ramones! All in all, 2024 delivered thousands of memorable moments to millions of people across the UK but, at the grassroots, delivery was too often only possible thanks to the passion and sacrifice of actors across the scene. The LIVE Board recognised early in the year that something had to be done to relieve the pressure at the grassroots, and were united in our view that:

- The grassroots crisis is real and extends beyond venues to include artists, promoters, festivals and more.
- There is a clear role for Government, given that its stewardship of the economy will determine our trading environment and audience confidence.
- There is a role for industry, led by LIVE, to both advocate for policies that will improve our trading conditions and develop funding solutions of our own.

We set out this position when called to appear before the Culture, Media and Sport Committee in Parliament as part of its inquiry into Grassroots Music Venues. Central to our evidence was the development of the LIVE Trust (see page 18) as a way of drawing funds from large shows and events and distributing it to the grassroots. Much of 2024 was spent shaping the Trust, building support and, importantly, registering it with the Charity Commission.

Another key event in 2024 was the General Election that saw Labour assume power for the first time since 2010. Having worked closely with Labour in opposition, we secured support on improving EU touring arrangements and tackling ticket touts, and work goes on to deliver those commitments. More broadly, we have worked with the Chancellor, Culture Secretary and other Ministers on how our objectives can support those of this Government, which is committed to growth in all parts of the UK. As they know, talent is everywhere, opportunity is not.

And yet, as the figures in this report show, we can be a driver of that growth in all regions, towns and cities across the country. Live music is a joyous experience and the desire to attend gigs remains strong for both Brits and international visitors. Venues and festivals of all shapes and sizes, operated by world-class teams and showcasing world-class established and emerging talent, will continue to delight audiences for decades to come as long as industry and Government protects and nurtures the ecosystem.

Jon Collins, CEO, Live

What live music *generates*

Last year emphatically demonstrated the huge contribution of live music to the UK economy. Our data for this report puts the total consumer spend driven by live music at a record £6.68 bn—a year-on-year increase of **9.5%**, and **28.2%** more than in 2022.

This performance caps a remarkable recovery from the COVID-19 pandemic, which decimated sales across the live music sector. Spend in the market plummeted to just £0.60 bn in 2020, when venues were closed for much of the year and summer festivals were cancelled. But the bounce back has been so impressive that spend last year was over £2 bn more than in 2019, the last full year before COVID.

It is also a notable outperformance of the wider music industry. Research for Goldman Sachs' 'Music in the Air' report indicates that global recorded music revenues rose by **4.8%** in 2024—half the rate of growth achieved by the UK live music sector. Encouragingly, Goldman Sachs forecasts further substantial growth in live music in 2025, driven by millennials and Gen Z fans. The report notes: "There's a robust demand and supply outlook for the live music industry… it has proven to be more recession-resilient than other forms of entertainment."

Some of the UK's growth has been driven by inflation, which was running at historically high levels through much of 2022 and 2023. However, 2024's increase of **9.5%** is nearly four times above the UK's **2.5%** rate of inflation in the 12 months to December, as measured by the Consumer Prices Index. This means that the large majority of recent growth was organic, and achieved by an exceptionally strong line-up of live music in 2024.

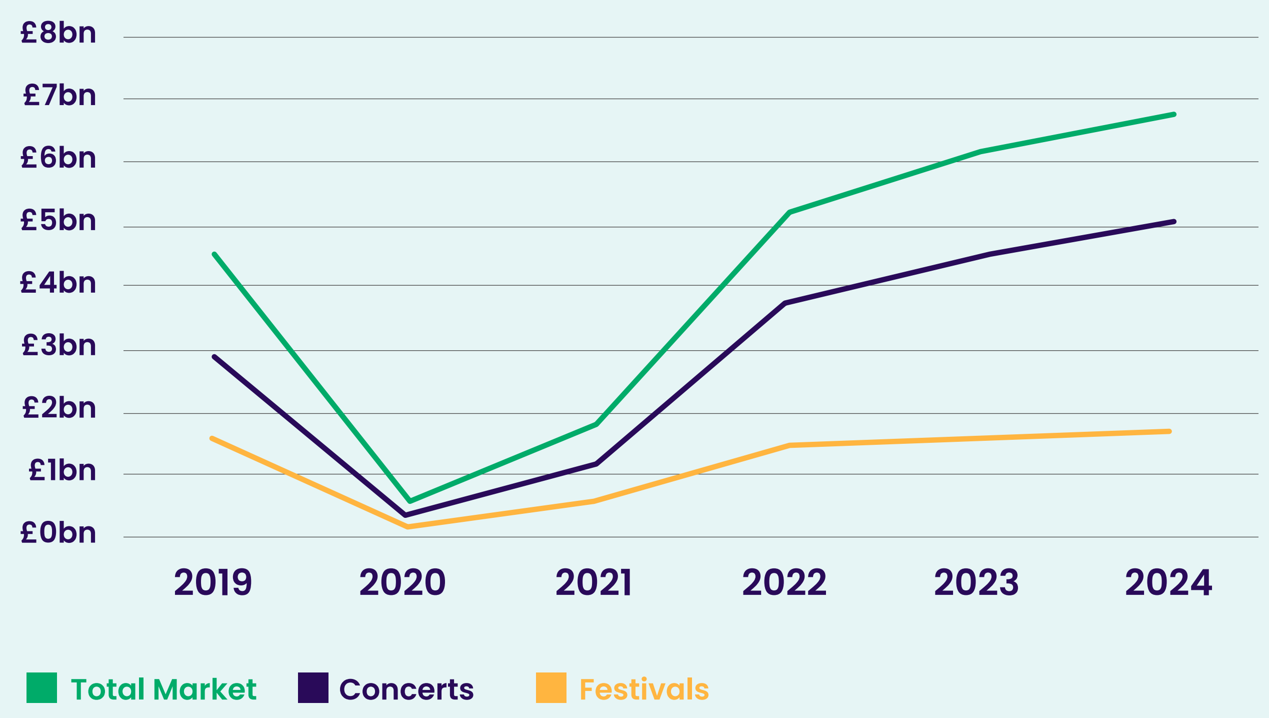
The biggest year-on-year difference in the market was the split between concerts and festivals. While festival spend rose by **1.9%**, concert income jumped **12.2%**. This meant concerts attracted **75.3%** of live music spending in 2024—nearly 2 percentage points more than in 2023. This is partly due to a slowing of growth in music festivals, some of which have struggled to sustain themselves through the extended period of high inflation. It's also attributable to higher ticket prices, which have had to rise after spikes in the costs of labour, energy and other important festival inputs.

However, a bigger factor was a stellar line-up of major-league artists in 2024—led, of course, by Taylor Swift. Stadia and arenas were the big beneficiaries, but conditions were more challenging for grassroots venues, where headroom for ticket price increases can be lower and where higher costs have a more immediate impact on operators.

Major artists may have drawn away some share from festivals in 2024, as some consumers facing pressure on their spending opted to prioritise big single-day concerts over multi-day events. Nevertheless, festivals' revenue has now surpassed the pre-COVID levels of 2019, and if consumers' confidence continues to increase, organisers can be cautiously optimistic that the pace of growth will increase in 2025 and 2026.

	2019	2020	2021	2022	2023	2024	2024 Share	2024 v 2023	2024 v 2022
Total market	£4.5	£0.6	£1.8	£5.2	£6.1	£6.7	-	+9.5%	+28.2%
Concerts	£2.9	£0.4	£1.2	£3.8	£4.5	£5.0	75.3%	+12.2%	+33.5%
Festivals	£1.6	£0.2	£0.6	£1.5	£1.6	£1.7	24.7%	+1.9%	+14.2%

Live music spend, 2019 to 2024 (£ bn)



£6.7 bn
Total spend driven by concerts and festivals in 2024

9.5%
Year-on-year increase in total market spend

48.5%
Increase in total market spend since 2019

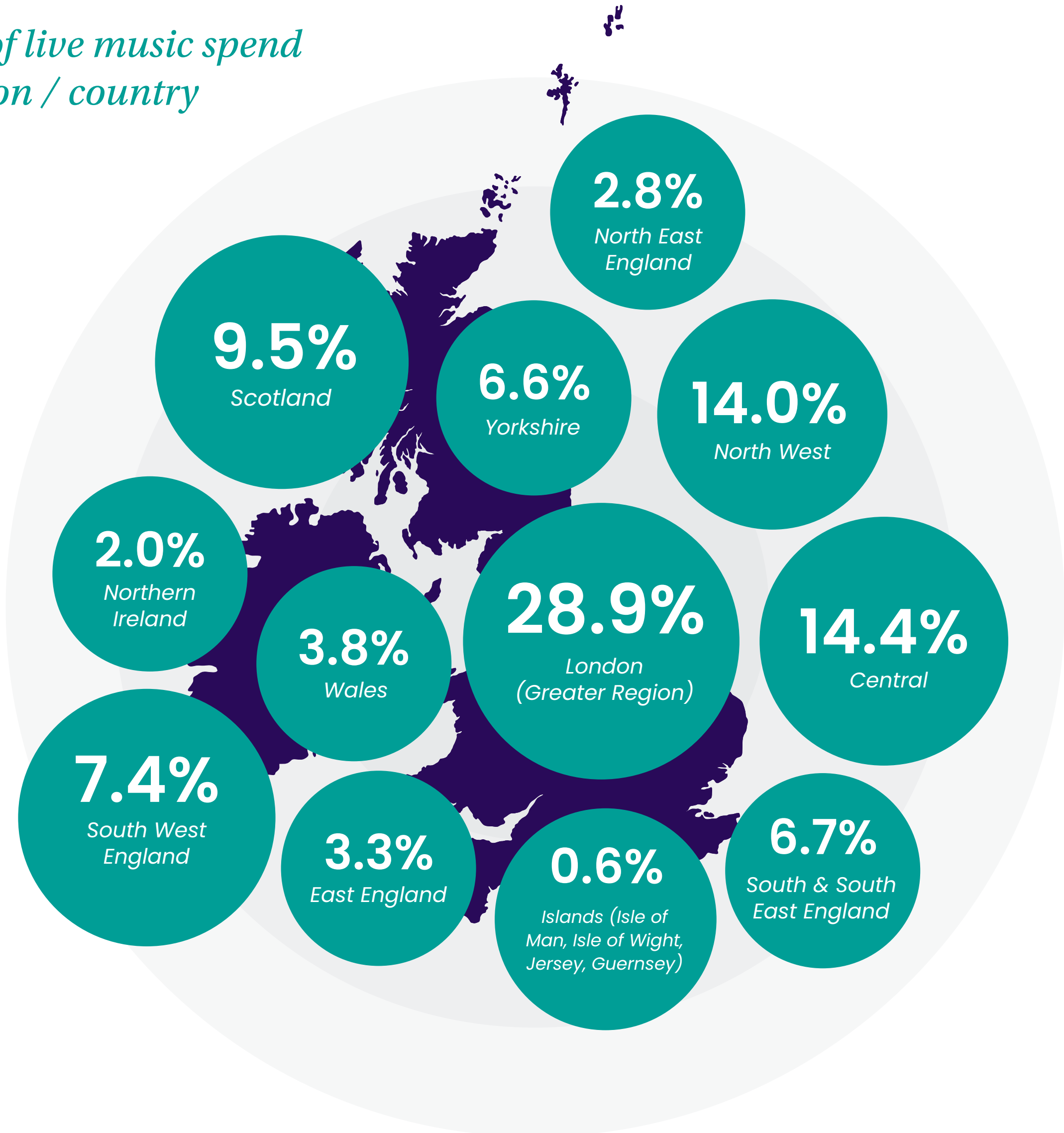
Spend by place

It is no surprise that London is the capital of the UK's live music scene. The Greater London region attracted **28.9%** of all expenditure in 2024, and it took an even greater share (**33.3%**) of concert income. The city remains the country's priority destination for touring artists, and it has substantially more venues and concert-goers than anywhere else. Its affluence, with an average spend notably higher than other parts of the country, is another advantage.

A breakdown of cities for the Live Music Report (see table) shows how central London generates more live music income than the next four cities put together. However, London's share was down slightly year-on-year, while Manchester made up some ground—partly thanks to the opening of the Co-op Live arena. Glasgow is the UK's third biggest city for live music, despite having a much smaller population than fourth-placed Birmingham. Elsewhere in the rankings, Cardiff overtook Edinburgh to become the fifth highest earning live music city in 2024.

These top five cities accounted for **46.2%** of all live music spend last year. But while that is a substantial share, it means that more than half of income was shared by a long list of smaller cities and towns around the UK. More rural areas benefit from the festival sector—especially in Central and South Western England, which shared **39.3%** of 2024's festival spend. This shows the very wide reach of the live music sector, and how it contributes to the economic and cultural life of every region of the UK.

Share of live music spend by region / country



Share of live music spend by city: top five

	City	% share of total revenue
1	London (central)	26.5%
2	Manchester	8.1%
3	Glasgow	5.7%
4	Birmingham	3.5%
5	Cardiff	2.4%

28.9%
Greater London's share of live music spend in 2024

8.1%
Manchester's share of live music spend in 2024

23.1%
Central England's share of festival spend in 2024

Live music by genre

2024 was a standout year for live pop music in the UK. It accounted for **32.1%** of consumer spend from the top 2,000 concerts of the year—a year-on-year increase of 4.7 percentage points. The figure is more than the two next most valuable genres put together: indie (**14.7%**) and rock (**13.4%**). Taylor Swift had a lot to do with that, and her blockbuster Eras tour was a massive boost to the cities it visited: London, Edinburgh, Liverpool and Cardiff. Some estimates put the total value of Swift's tour to UK spending at £1bn.

However, there were many more high-earning artists in the live pop music sector in 2024, as well as a very long tail of other genres. Electronic and alt rock music complete the top five for 2024, but a multitude of other genres shared **26.9%** of spend. Classical, R&B, rap, folk, Bollywood, metal and country music all earned more than **1%** of total income. When you factor in that Latin artists are increasingly prevalent across multiple genres, this all points to the rich diversity of live music that contributed to the UK economy and cultural capital in 2024.

Share of live music spend by genre: top ten

Genre of artists at the top 2,000 events of 2024 by revenue

	Genre	Share of spend	Year-on-year percentage point change in revenue
1	Pop	32.1%	+4.7
2	Indie	14.7%	+1.0
3	Rock	13.4%	-1.6
4	Electronic	9.2%	+1.2
5	Alt Rock	3.7%	+0.4
6	Classical	3.7%	-0.6
7	R&B	3.7%	-1.0
8	Rap	3.3%	-2.2
9	Misc	2.1%	+0.4
10	Folk	2.0%	+1.5

Live music employment

Live music continues to be a hugely important provider of both permanent and casual employment in the UK. It employed more than 234,000 people in 2024—a **2.2%** increase year-on-year, and **11.7%** more than in 2019, the last full year before COVID-19 hit. This is another indication of how well the live music sector has rebounded from the turmoil of the pandemic.

The **2.2%** growth in employment is substantially below the **9.5%** increase in live music revenue in 2024 (see page5). This suggests an increase in the productivity of event staff, as well as in the hours that people are working. It may also point to the efficiencies that employers have found in their labour arrangements.

Our data shows that around four in five (**78.8%**) jobs in live music are casual, with permanent staff accounting for the remainder. Growth in casual numbers was slightly faster than permanent staff in 2024, reflecting the efforts of live music venues and others in the sector to recruit temporary, freelance, self-employed and agency staff. It continues a post-COVID shift and means that casual staff numbers are now much higher than they were in 2019, while permanent staff remain below those levels.

The costs of employing staff will be another major challenge for live music businesses in 2025. Increases in National Minimum and Living Wages and National Insurance contributions have added to employers' payrolls since April, and nine in ten (**91%**) leaders in hospitality told the recent Business Confidence Survey from CGA by NIQ and Sona that increased employment costs were a concern for the next 12 months.

Many employers are being forced to trim labour bills, the Business Confidence Survey showed. Nearly two thirds of leaders have reduced the staff count (**65%**) and / or cut the hours available to their staff (**63%**), while **29%** have cut spending on employee benefits and training. Staffing will continue to be a priority issue for live music over the rest of 2025 and beyond, and employers will be hoping for better support from government to help them protect jobs and create new ones.

Live music employment, 2019 to 2024

	2019	2020	2021	2022	2023	2024	2024 v 2023	Share
Total	210,000	-	180,600	228,340	229,683	234,630	+2.2%	-
Of which permanent	52,000	-	44,720	51,696	49,357	49,730	+0.7%	21.2%
Of which casual	158,000	-	135,880	176,644	180,287	184,900	+2.6%	78.8%

234,630
Estimated total permanent and casual staff in live music in 2024

2.2%
Year-on-year increase in total staff

78.8%
Of staff are employed on a casual basis

LIVE Insights: Freelancers

Throughout the year, LIVE produces a range of research documents and other guidance on topics of relevance to the live music sector. Alongside our regularly updated research into audience behaviour, 2024 saw the publication of Powered by Freelancers, a groundbreaking report that offered a comprehensive study of the freelancer experience in the UK live music sector.

Produced in partnership with Handle Freelance Solutions, THE BACK LOUNGE and UK LIVE Event Freelancers Forum, Powered by Freelancers was commissioned to help understand and identify the changes required to improve the experience of the freelancers who are crucial to the success of the live music industry. 1,281 live music freelancers contributed to this survey, with **87%** of respondents stating that freelance work provides their primary income.

The report identified a core positivity, but also key concerns and suggestions for improvement. It demonstrates how the live music industry can become an even more attractive, inclusive and safe space to work for all. Nearly three quarters (**73%**) of respondents agreed that live music is a great industry for freelancers to work in, while **60%** felt optimistic about the next 12 months. However, the report also highlights areas where changes are required to improve the experience of freelancers, including financial security, better pay, flexibility and work-life balance—all factors that are becoming increasingly important to those working in live music.

Around recruitment and securing work, **59%** of respondents agreed that enough freelance jobs were available, but **56%** said that they found it difficult to access or secure those roles. Younger people and non-male respondents expressed less optimism about job security and more difficulty finding work. Throughout the report, varying factors around age and gender point towards an imbalance that demonstrates the need to nurture opportunity and diversity and ensure that the industry attracts a wide range of new talent and is a secure and positive place to work.

The cancellation of work by event organisers at short notice emerged as a key concern for many of those taking part in the survey. With less than half of respondents (**49%**) having signed contracts in the last 12 months before agreeing roles, a similar percentage have experienced cancellation of work in the same period, with **48%** having jobs cancelled with less than one week's notice.

Freelancers are crucial to the success of the live music ecosystem and our industry relies on them to deliver unforgettable experiences for fans. Much in the report is great to see, not least the resoundingly positive response from people when asked if ours is a great industry to be in. Reports like this will always highlight opportunities for improvement and we took the learnings and funnelled them into the work of our LIVE Workforce group, where industry experts alongside equality, diversity and inclusion and workforce specialists work towards objectives that positively impact the current and future workforce of our industry.

73%

Of freelancers agree live music is a great industry to work in

60%

Of freelancers feel optimistic about the next 12 months

56%

Of freelancers say they have found it difficult to access or secure roles

LIVE's Expert groups

LIVE is fortunate to be able to draw on a wealth of insight and experience from across the live music sector and associated expert groups to inform and guide our work on a range of issues. These five groups all meet on a bi-monthly basis, bringing a currency to our discussions that means we keep on top of the issues that matter to our members.

LIVE Festivals
(Chair, John Rostron, AIF)

The only group that brings together festivals of all scales and actors from across the supply chain, an increasing focus for LIVE Festivals in 2024 was the challenging trading environment. The grassroots crisis that first emerged in venue closures was now claiming festivals, with 78 calling time in 2024. LIVE Festivals held extended meetings, encouraging all to contribute, discuss and debate the challenges in the current operating environment. Off the back of these discussions, we have supported the development of a proposal for a specific tax relief for festivals and would hope to see this adopted by Government. This information has also been fed into Government as part of our work shaping their industrial strategy and informed our approach to the CMS Committee inquiry into Grassroots Music Venues—with an emphasis on the need to consider the wider ecosystem, including festivals—and the development of the LIVE Trust (see page 18).

Throughout the year, LIVE Festivals also heard from a number of expert contributors such as A Greener Future on power usage, our own Ross Patel on sustainability contract clauses and Attitude is Everything on their revamped Live Events Access Charter. Another recurring issue was the Terrorism (Protection of Premises) Bill (now an Act) as it made its way through the legislative process. LIVE Festivals informed LIVE's position as, alongside AIF and representatives from the largest of festivals, we made clear the need for proportionality and clarity in the guidance and wider work of the regulator.The group also retained a people focus, recognising how vital our teams are to delivering brilliant festivals. We heard from mental health experts such as Tonic Rider, promoted initiatives to tackle racism and misogyny and shared the findings from ground-breaking freelancer research (see page 10).

LIVE Green
(Chair, Carol Scott, TAIT)

A landmark moment for LIVE Green in 2024 was the appointment of Ross Patel as our first ever LIVE Green Impact Consultant. Their expertise, energy and drive has allowed us to accelerate our work in this most critical of areas, most notably through the development of model sustainability contract clauses and a complementary green rider.

LIVE Green continues to be the space where actors from across the industry come together with expert organisations such as A Greener Future, Hope Solutions, Julie's Bicycle and Vision 2025 (now Vision for Sustainable Events). LIVE Green coordinates industry efforts to meet the LIVE Green pledge to be net zero by 2030. Through knowledge-sharing, networking and supporting and initiating research, LIVE Green seeks to improve our understanding of sustainability in live music.

Across 2024, LIVE Green expanded its digital hub to host a range of practical guidance and signposting documents—from the Arts Green Book and NAA's sustainability guidance to AGF's Low Emissions Festivals Report and a guide to sustainable event suppliers. LIVE Green also took on the chair role for the development of the third iteration of The Show Must Go On report and acted as a welcoming inclusive space to discuss often challenging topics such as boycotts and sponsorship. Adding so much value to this work is our partnership with Earth/Percent, the music industry's climate foundation that supports organisations that meaningfully address the climate and nature crises. Earth/Percent has proven an excellent partner of LIVE, helping us play a coordinating role while directly supporting our work via grant funds.

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

2024 saw an opening up of new possibilities for the LIVE Touring group as a change of Government promised a fresh look at EU touring. Informed by the work of LIVE Touring, LIVE had secured an election manifesto commitment from Labour to seek improved touring arrangements as part of a reset of the UK Government's relations with the EU. This was a significant moment for LIVE and was secured off the back of many hours of hard work by this group, overseen by Dave Webster in his role as chair.

The last half of the year was dominated by our work with Government—developing, evidencing, refining and repositioning our asks as we looked to address the artist/crew, carnet, cabotage, merchandising and other issues that currently complicate EU touring and lead to many opting out of this vital market. An important element of this work was LIVE's membership of the UK Domestic Advisory Group on the Trade and Cooperation Agreement with the EU, the body reviewing how the post-Brexit arrangements are working. Drawing on the work of LIVE Touring, LIVE has been able to advocate within the DAG for new touring arrangements, calls that have been adopted by our EU counterparts.

Beyond the EU, a second major focus for the group has been on inbound arrangements for artists and crew. LIVE secured increased resource and improved processing times for A1 forms (though things seem to be slipping back). In addition, we worked with officials across multiple departments on the challenges caused by the new Electronic Travel Authorisation system and related lack of flexibility for officials.

LIVE Venues
(Chair, Guy Dunstan, then NEC & Dom Stokes, Utilita Arena & Sheffield City Hall)

Similar to LIVE Festivals, LIVE Venues is the only group that brings together operators from the grassroots, through midsize and on to arenas. As such, it was perfectly placed to inform LIVE's work on the CMS Committee inquiry into Grassroots Music Venues. Throughout the year, LIVE Venues was an important sounding board for our proposals on the LIVE Trust and associated funding plans.

Venue safety remained a prominent issue with the progress of the T(PoP) Bill a focus and the group worked with the UKCMA on their 'Safer Crowds, Safer Venues' guidance.

Sustainability was also a consistent theme with the group helping shape LIVE's contract clauses as well as hearing from the NAA on their Green Guide and the authors of The Arts Green Book. And ticketing became more prominent across the year as a result of the Oasis on-sale and the Government's pledge to tackle touts.

The role of licensing was a consideration—both the general need for a rebalancing of the licensing process and the specific challenges faced by Black, Asian and racially diverse artists and promoters. Both issues fed into LIVE's support for the Government's developing industrial strategy, which pledged to foster growth in the creative industries—growth that was undermined by moves to increase employer National Insurance contributions and reduce business rates relief.

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

It was a very busy year for LIVE Workforce, as the group made progress on hugely important issues impacting the people in our sector. Similar to LIVE Green, LIVE Workforce brings together actors from across live music and a range of subject matter experts to collaborate on issues such as mental health, supporting parents and carers, trans inclusion and sector skills. Building on this approach, LIVE collaborated with Handle Freelance Solutions, The BACK LOUNGE and UK Live Event Freelancers Forum to produce first of its kind research into the freelancer experience in live music with a clear set of actions to follow (see page 10).

A priority for the group was addressing racial inequality both in live music and in the regulation of live music. To this end the group was proud to support the work of Black Lives in Music on its own anti-racist code of conduct and alongside the Musicians' Union on Project REMEL, chaired by the Greater London Authority with an aim of removing systemic racism in the policing of live music events across London.

In response to the then Conservative Government's refusal to act on the Women and Equalities Committee report into misogyny in music, LIVE Workforce became a vital sounding board for LIVE's own work in this space, led by Gaby Cartwright. Developing a statement of commitment, undertaking training and preparing ground-breaking research showed our serious intent to tackle this issue—as did LIVE's ongoing support for CIISA, which continued to raise its profile and plans for operation across 2024.

LIVE's Mission to Empower the UK's Live Music Industry

1. Kickstart economic growth

A. Unleash the economic potential of our world-leading live music industry

- Build an Industrial Strategy which accelerates the potential of live music to drive UK economic activity
- Reform the business rates system to reduce burdens faced by music venues and rehearsal spaces
- Commit to hosting regular meetings of the Live Music Council
- Put 'Agent of Change' protections in primary legislation and make MVT a statutory consultee to protect venues threatened with closure
- Deliver on the Culture, Media, and Sport Select Committee's recommendations to support grassroots music venues
- **Industry commitment:** Generate an annual grassroots music fund to be distributed by the LIVE Trust

2. Break down barriers to opportunity

A. Improve the UK's relationship with the EU to help our touring artists and boost cultural exchange

- Amend the 90/180 rule for non-Schengen third countries so artists and crew can tour more freely in the EU
- Deliver a Cultural Accord to improve touring arrangements for UK and EU artists and their crew
- Establish a Music Export Office with government Expand funding via the Music Export Growth Scheme
- **Industry commitment:** Work with policymakers in the UK and EU to secure improved touring arrangements to the benefit of the UK and EU live music sectors.

B.Put fans at the heart of live music and give them fair opportunities to access live music

- Tackle ticket touting by capping resale prices and giving the Competition and Markets Authority the powers it needs to regulate resale platforms
- Require tech companies to stop promoting ticket touts
- Industry commitment: Develop industry-wide practices to increase transparency for customers

C. Invest in the next generation of musical talent

- Shape the Growth and Skills Levy to permit more tailored skills training for the live music sector
- Launch the new National Music Education Network and train and recruit 1,000 more music teachers
- **Industry commitment:** Work with Skills England to analyse steps needed to address the skills shortages in the live music sector
- **Industry commitment:** Implement findings of LIVE's freelancer research to improve recruitment and retention

3. Ensure a safer Britain

A.Strengthen a safe and secure live music sector

- Ensure the guidance for the Terrorism (Protection of Premises) Bill is workable, proportionate and delivers greater reassurance and safety for concertgoers
- Amend the Equality Act 2010 to reduce the vulnerability of a largely self-employed workforce
- Empower the CIISA to set robust, industry-wide standards on acceptable behaviour to reduce the risk of harm
- **Industry commitment:** Build on the work of the LIVE Workforce and LIVE Misogyny in Music groups to shape how the sector challenges misogynistic behaviour and discrimination in order to build a more inclusive live music sector.

4. Make the UK a clean energy superpower

A. Build a sustainable live music sector

- Accelerate the sector's transition to net zero through increased funding and technical support
- **Industry commitment:** Continue to shape a unified vision for climate action in the UK's live music sector

LIVE Trust

Established by and acting on behalf of the UK live music industry, the LIVE Trust will deliver funding where it is needed most to help all in our sector thrive. With trustees drawn from across the live music ecosystem, the LIVE Trust's initial focus is to support our grassroots music sector—from venues and artists to festivals and promoters.

Established in response to the 2024 Culture, Media and Sport (CMS) report calling for an industry-led voluntary solution to the crisis in the grassroots music industry, the LIVE Trust builds on the pioneering work of the Music Venue Trust to manage a funding programme founded on a voluntary £1 ticket contribution on arena and stadium shows with a capacity over 5,000.

The LIVE Trust will work to support those who are keeping venues open, festivals trading, artists touring and promoters promoting. The aims of the LIVE Trust are to promote public access to, appreciation of and engagement with live music by:

- Facilitating public access to live music through the provision of support to community-based music venues and festivals.
- Supporting the composition and performance of new music through the provision of training and other support to people in the early stages of their careers as musicians, their teams and crew.
- Helping people to develop sustainable careers in the live music sector.

The impetus for the LIVE Trust came from the increasing pressures in UK live music and the associated interest from politicians and policymakers. By creating an industry-led solution, we can avoid statutory intervention from Government. By supporting the LIVE Trust our industry gets to decide how money is raised and where that money should go.

Trustees were selected on the basis of their passion for and understanding of the world-class UK live music sector and how their particular skills could help secure a vibrant future for venues, artists, festivals, promoters and the wider range of actors that make shows possible. They share the Trust's vision for an inclusive and sustainable live music industry with a particular focus on the needs of the grassroots sector. The board will use the experience and networks that the trustees bring to further augment its collective decisions around the assessment of where need is most pressing and where funds can give most impact. The trustees are:

Set up with rigour and an eye on the long term, the LIVE Trust is dedicated to supporting and shaping the critical grassroots ecosystem across the UK.

LIVE Talks

LIVE Talks is an ongoing series of free online workshops and discussions focused on equity, diversity and inclusion (EDI), sustainability and wellbeing. The initiative is designed to help shape a more inclusive, informed and supportive working environment across the UK live music sector.

Now in its third year, LIVE Talks continues to grow in both reach and impact. Following a successful programme in 2023, the series has delivered a total of 18 insightful talks to date, all freely accessible via the LIVE website. Each session offers practical guidance and thoughtful discussion on key issues shaping the live music workforce, from inclusion and wellbeing to sustainability and safer working environments.

In 2023 and 2024, the series evolved to tackle urgent and emerging issues affecting those working in live music. Curated by LIVE's Head of Partnerships, Gaby Cartwright, the programme brought together expert speakers, industry leaders and changemakers to share ideas, practical advice and personal perspectives. Recent talks have included:

- Flipping the Script: Breaking Down Barriers for Disabled People with Attitude is Everything
- Equality and Equity in the LIVE sector of the UK Music Industry with Power Up
- Trans Education and Inclusion in the Live Music Industry
- Untangling ADHD from Struggle to Strength in the Workplace
- Menstruation and Menstrual Health in the Music Industry
- From Melas to Stadiums: Exploring Opportunities within South Asian Live Music
- Music Support: Family & Friends—The Ripple Effect of Addiction and Recovery

LIVE Talks continues to attract strong attendance and sector-wide engagement, demonstrating a clear appetite for open dialogue and collective learning. We're incredibly grateful to our partners and speakers for their time, insight and commitment to driving positive change. With their support, LIVE Talks is helping to build a more resilient, equitable and sustainable live music industry for everyone.

About the research

Analysis for this report combines LIVE's experience in the live music sector with the research capabilities of CGA by NIQ, a long-established and widely-respected analyst of trends in the UK's hospitality sector. CGA's expert team deliver a wide range of sales, outlet and consumer research solutions that deepen businesses' understanding of pubs, bars, restaurants and other licensed premises.

For this report, LIVE and CGA liaised with operators, associations, music licensing bodies and ticket agencies to agree an approach to valuation that focuses on core live music. Combining data from these key stakeholders and CGA'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, Ticketmaster and others who supported this report with data and insights.

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

CGA by NIQ

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