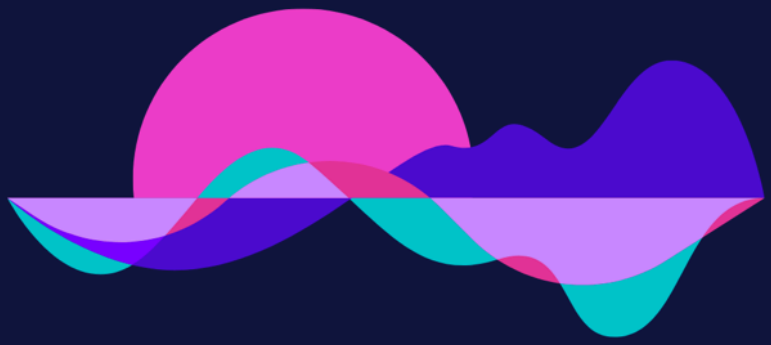


IMEMS

Innovation Mapping
for the European Music Sector

Mapping of AI-driven Solutions for the Live Music Sector and Music Export

LIVEMIX

Co-funded by
the European Union

Table of content

Table of content

IMEMS

Innovation Mapping
for the European Music Sector

01

Executive Summary

The European live music sector stands at a crucial crossroads, facing rising operational costs, evolving audience behaviors, and significant disparities in post-pandemic recovery. These challenges are compounded by the sector's traditionally fragmented workflows and specificities limiting adoption of technology.
This report explores how artificial intelligence (AI) can serve as a catalyst for enhancing resilience, efficiency, and creativity within the live music industry. Through a mapping of emerging AI-driven solutions, sectoral consultations, and stakeholder engagement, our research identifies the sector's key functional, structural, and cultural needs.

Five primary categories of needs emerged:

1. Specific functional requirements by profession & categories of organizations.

2. Cross-functional needs for better synchronization and interoperability of digital tools.

3. Enhanced project monitoring and intelligence to integrate live performance data with broader consumption metrics.

4. Productivity improvements through process automation, freeing up time for artistic, public engagement, and R&D efforts.

5. Democratizing access to creative tools to support new forms of artistic expression and audience interaction.
   Additionally, sustainability considerations and ethical integration of AI surfaced as underdeveloped yet vital areas for future exploration.

In response, this report provides targeted recommendations to:

- Foster cooperation and open innovation between live music professionals, research institutions, and tech actors.
- Develop shared databases and interoperability standards.
- Address licensing and copyright challenges.
- Launch pilot projects to validate AI solutions.
- Invest in capacity-building initiatives and training programs.
- Align AI adoption with European values of diversity, sustainability, and fairness, notably guided by existing sectoral frameworks.

Ultimately, by integrating responsible AI strategies, Europe's live music sector can position itself as a leader in cultural innovation, strengthening its competitiveness while upholding its cultural mission.

IMEMS

Innovation Mapping
for the European Music Sector

02

Introduction

Europe's live music sector is a significant component of its cultural and economic landscape. Projections indicate that by 2030, the industry could reach an annual value of approximately €38 billion.

Background & context of the Live Music Sector

However, the faces various problems including but not limited to:

Rising Operational Costs

Increasing expenses related to venue rentals, artist fees, production, and transportation are exerting financial pressure on the industry. These escalating costs often lead to higher ticket prices, potentially deterring some concertgoers and squeezing profit margins for organizers.

Changing Consumer Behavior

Shifts in audience preferences, influenced by economic uncertainties and the proliferation of digital entertainment options, have led to a more selective approach to attending live events. This change necessitates that venues and artists innovate by offering unique experiences and enhancing their online presence to attract and retain audiences.

Post-Pandemic Recovery Disparities

While larger events and venues have shown resilience post-pandemic, smaller, grassroots venues continue to struggle. This disparity creates a 'two-tier' system within the live music industry, threatening the long-term sustainability of smaller establishments that are crucial for emerging artists and local culture

Economic Pressures on Consumers

Broader economic challenges, such as rising living costs and increased credit card debt, affect discretionary spending on entertainment. This economic strain can lead to reduced attendance at live events, impacting revenue streams for artists and venues.

Objectives of the project

IMEMS is the collaborative effort between Music Tech France, Music Tech Germany and WISE - the Future festival & Think Tank initiated in 2024 to create the European Mapping of AI MusicTech solutions dedicated to the Live music industry.

In the ever-evolving landscape of the music export and live music sector, we clearly identify the multifaceted challenges faced by the industry. Hence our curation of a comprehensive directory of European MusicTech companies successfully addressing these challenges through innovative AI solutions.

A mapping of emerging solutions

IMEMS aims to present a mapping of present solutions leveraging the transformative potential of AI and identify the key zones of impact, categorize them and provide a clear overview of the current sector. The first step in mapping the musictech ecosystem therefore has to represent all aspects of its impact along the value chain. Several European hubs have started studying their ecosystem to better serve their members; we harmonized these efforts by creating the first standard of mapping for the music industry on a European level.

A networking strategy to gather insights

Additionally, we propose to enhance networking formats within the AI mapping project, creating inclusive and accessible opportunities for artists and professionals to connect, share insights, and build meaningful collaborations at conferences and beyond.
To do so, we included panels and roundtable discussions with various guests both from the Live industry and the Innovation field, to spark discussions and potential projetcts, but also to give our project resonance among the MusicTech professionals and media outlets.

A feedback & needs assessment

During the development of our project, we quickly realized that the number of AI MusicTech solutions specifically dedicated to Live is scarce. This is why our project was enhanced with another focus along the way: gathering feedback from Live music professionals, dealing with Innovation and its benefits as much as its challenges.

We added interviews and feedback to our project, to fully integrate Live Music and Export in our considerations.

Presentation of the project partners

Music Tech France has been organizing and building a strong community of innovators, connecting them to music industry leaders since 2019. We have been organizing 20-30 events each year, from small meetings with big accounts (Radio France, Ubisoft, Warner, Sony, Universal, Believe, Weezevent...) to wider public events (with the Ministry of Culture, incubator Paris&Co, CNM...).

MusicTech Germany is the main point of contact for technology-driven innovation for the music sector. The federal association has established a network of companies, research institutions and academia across the entire music technology sectors in Germany, Europe and beyond. MusicTech Germany has curated conferences and facilitated events on innovation for the music ecosystem and hosted its own event series “The Berlin MusicTech Meetups” since 2018 where some of the world’s best AI experts have spoken.

WISE is well versed in music export in different verticals of the music industry and has been hired to plan and implement events/trade missions for Initiative Musik and GEMA (at SXSW), EMEE (in Mexico) and Music Norway (in China) as well as conducting research on the topic for the music markets Mexico and China, publishing a report on Chinese Music Export. WISE itself has been organizing / curating its own events at the intersection of music & tech in China (Beijing, Shanghai, Chengdu), Berlin, Austin & Miami. Philipp also has over 20 years hands-on experience in the live music sector as he has booked over 200 artists.

Presentation of LiveMX and financing

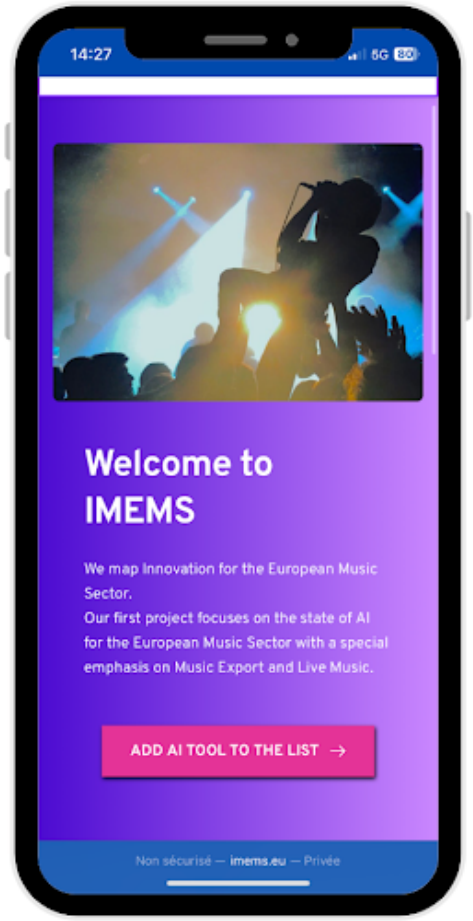
This project was supported by the European Commission, LiveMX and their partners: INOVA+, LiveDMA and EMEE. We are proud to be part of this global effort of nurturing a diverse and sustainable sector for the European music ecosystem.

IMEMS

Innovation Mapping
for the European Music Sector

03

Methodology



Description of the research methods for data collection

We followed three steps:

1. **Building a mapping of the European Music Tech ecosystem**

AI-powered solutions for the music industry, focusing on the needs of European (Live) Music and Music Export, were sought to be gathered in a comprehensive mapping. To do so, we set up an online form to send our partners and members of the Music Tech Europe ecosystem (a collective of 11 hubs for MusicTech, each with their own network) and pushed the communications over 2 to 3 months. We then studied the submissions, selected and mapped them out to showcase a global overview.

2. **Presenting and contextualizing the results of this research work at conferences.**

In addition to compiling AI MusicTech solutions for Live, we addressed the music industry itself and confronted our hypothesis and findings during panels and conferences. We set roundtables / panels at WISE Conference (May, Germany), Wallifornia MusicTech Summit (July, Belgium), SoAlive Conference (Oct, Bulgaria) and took part in conversations at ESNS (January, Netherlands) and Midem (January, France). The takeaways of the discussions led on stage are listed below.

3. **Gathering feedback from music industry professionals**

Working with and in collaboration with the Live Music sector led us to conduct interviews and compile feedback from a diverse selection of Live Music professionals with the involvement of Ekhoscenes, the French union for the Live sector.

Summarizing our global project, we are now releasing our report with the findings we have gathered during our research phase, from panels and interviews led along the last year with Live music professionals and Innovative solutions.

Tools and technologies employed in the mapping process

- IMEMS.EU: our website centralizing forms, information on the project, the partners and the panels we took part in.
- QUANTITATIVE SURVEY for SERVICE PROVIDERS
- QUALITATIVE INTERVIEWS for the LIVE MUSIC SECTOR & MUSIC EXPORT

IMEMS

Innovation Mapping
for the European Music Sector

04

Stakeholder Engagement and Sectoral Events

Overview of the sectoral events in Europe where the project has been discussed

WISE Conference, Berlin, Germany, 15th of May 2024 "Innovation4Live: the impact of AI in the European Music Sector" with Johannes Everke (Managing Director at BDKV), Richard Kurka (Co-Founder & Head of Business Development at Aurismatic), Paul-Simon Geddis (International audiences and Partnerships Lead, Sónar+D) and Mathilde Neu (cofounder of Music Tech France)

Activities & Outcomes

To kick off IMEMS, we gathered at Wise - the Future Festival & Think Tank in Berlin with the 3 partners and set up our first panel of the project. Our goal here was to start a conversation mixing views from innovators and music professionals, to identify the first pain points.

One of our first focuses was the scenic implications of AI, with the tests led by Sonar and Sonar +D with Paul, highlighting projects such as STARTS, involving artists to play in collaboration with technology. Only issue being that replicability was and still is difficult to integrate in these projects, implying a very costly one occurrence operation. Although the reception was positive, new experimentations should be more accessible to events.

Quickly moving on to a very practical aspect of our discussion was the need for teams in the Live music sector to grasp innovative solutions, not even related to AI technologies. Without specific and reliable training, the integration of innovative solutions is relatively complex and impacts productivity in the short term.

Finally, benefitting from the presence of Aurismatic, automating the setlist monitoring, copyright was our last topic of our conversation, highlighting the blur around AI implications (back in May 2024, the AI Act was barely in activity).

Wallifornia Music Tech Summit, Liège, Belgium, 10th of July 2024
"The State of AI for the European Music Sector" with Philipp Grefer (founder of Wise - the Future Festival & Think Tank), Alex Stevens (founder of Bookr.fm / Founder & Music Advisor at Okalaka Agency) and Mathilde Neu (cofounder of Music Tech France)

Activities & Outcomes

Two specific key elements were raised during this conversation:

1. **Market permeability:** building innovative solutions is the first step, but as Alex Stevens highlighted, as a festival curator and a MusicTech entrepreneur, navigating both sides comes with misunderstandings, proving how key is communication when it comes to offering a tech solution, enhancing music professionals' activities. Regarding Live, a clear issue is the internal change, work methods still heavily relying on network and barely on audience understanding.

2. **Opportunities offered by data:** the idea of an open source database on concerts was brought up during our conversation, to allow curators to work on prediction. Data is key to recommendation based on streams, followers, past concerts and shows, but mainly to train and rely on AI to automate parts of the daily work for curators (without replacing anyone)

Ekhoscenes Assemblée Générale - Reims, France, 31st of September 2024 "Being Technologically Innovative: Exploring Live Performance Innovations with MusicTech" with Yvan Boudillet (cofounder of Music Tech Europe) and Mathilde Neu (cofounder of Music Tech France). Credits: Philippe Levy

Activities & Outcomes

This intervention was a turning point in the direction of our project. We were invited by the French national union for the Live Music Sector to present our organizations and start discussions on innovation as an opportunity and gather feedback from the potential users of the companies we started aggregating through our forms.

During the 2 hours we had with a room of Live producers, we heard some of the most insightful feedback that drove the report we are publishing today:

- Innovative solutions on the market are limited and the ones currently being used as standards need to interoperate with one another. The main difficulty raised during the workshop was interoperability and limited evolution of existing technologies.
- Training teams to use new tools and change internal methods is too time-consuming for the majority of producers in Live. Whether it's venues with limited personnel already or festivals with periodic strong urgencies, background matters tend to be last on the list.
- New live experiences often feel out of reach due to costs of installations and equipment but also the long time periods for set up and limited replicability

SoAlive Music Conference, Sofia, Bulgaria, 3rd of October 2024
"Innovation4Live: the impact of AI in the European Music Sector" with Takayuki Suzuki (Managing Directeor of MusicTech Japan), Matthias Strobel (founder of MusicTech Germany), Philipp Grefer (founder of WISE - the Future Festival & Think Tank) and Mathilde Neu (cofounder of Music Tech France)

Activities & Outcomes

The three partners were invited at the SoAlive Music Conference to present our project and gather feedback from the audience on site, benefitting from a unique point of view thanks a Balkans-based audience.

The result of the experiment was striking: as soon as the topic of AI was raised, all questions drove towards copyright and trained datasets, European legislation and artists' concerns. As important as these topics are, no debate around AI's involvement in the Live sector stuck during our hour with the audience. AI still carries many negative biases and needs to be demystified from GenAI to a more applicable version of the technology.

Another differentiating aspect of this talk was the presence of Takayaki Suzuki, from MusicTech Japan to make a comparison between Europe and Asia regarding innovation and Live. If the Asian market is more receptive to Live experiences (VR, holograms, etc.), automation and productivity solutions are still limited as well. One common trend came up from this discussion: the rise of AI assistants in the music field, following a more global trend in many fields.

Eurosonic ESNS, Groningen, January 17-18, 2025
credits: IQ magazine

Activities & Outcomes

We participated in two panels at ESNS 2025, presenting the IMEMS project to an audience composed of live professionals, artist managers, and independent labels.

Panel 1: "Unveiling the Role of AI in Europe's Live Music Sector"

Moderator: Femke Blok (Netherlands) – Co-founder, Music Tech Netherlands

Panelists: Yvan Boudillet (France) – Co-founder, Music Tech Europe, Jan Pauly (Belgium) – Community Manager, Music Tech Belgium, Sean Bradford (Netherlands) – Founder, ORIGIN STØRIES, Philipp Grefer (Germany) – CEO & Founder, WISE – The Future Festival & Think Tank

This discussion focused on how AI is beginning to support booking, audience development, and operational processes. A call emerged for the sector to be more open to experimentation—especially in areas like audience experience, scenic creativity, and the measurement of diversity and inclusion.

Panel 2: "Innovations Shaping the Future of Live Entertainment"

Moderator: Yvan Boudillet (France) – Co-founder, Music TechEurope

Panelists: Takayuki Suzuki (Japan) – Managing Director, MusicTech Japan, Maiju Talvisto (Finland) – Co-Director, Shesaidso, Stathis Mitskas (Greece) – Co-founder, ComeTogether, Jos Feijen (Netherlands) – Director, Effenaar

Participants agreed that live performance holds tremendous untapped potential for the deployment of AI technologies, from creative augmentation to workflow automation. However, they also stressed the importance of establishing usage norms and ethical frameworks through sector-led experimentation. The live music industry has a key role to play in this regard, by testing use cases and defining standards rooted in artistic practice, collective responsibility, and shared value creation.

Support for Music Tech Europe

Support from the Music Tech Europe network, which helped relay the call for contributions from solution providers and gather usage inputs from live sector actors involved in innovation hubs in the Netherlands and Belgium.

Special cooperation with Ekhoscenes

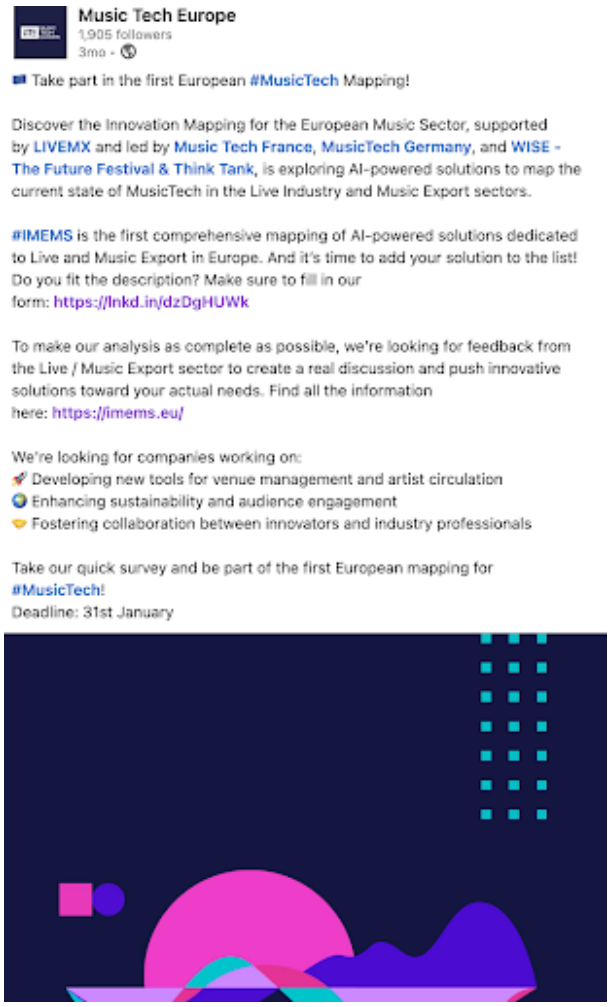
We went through a series of interviews with their members and interactions with organizations like Liveurope, LiveDMA and other trade bodies along the durability of our project.

IMEMS

Innovation Mapping
for the European Music Sector

05

Mapping of Emerging AI-driven Solutions



5.1 Call for Solutions & Research

In order to build a comprehensive and up-to-date mapping of AI-driven solutions for the live music sector and music export, we launched an open call to the European and international music tech ecosystem. This call for entries was disseminated through the professional networks of Music Tech France, MusicTech Germany, and WISE – The Future Festival & Think Tank, as well as through the broader Music Tech Europe network, representing 11 national hubs and their members.

The objective was to invite startups, developers, and service providers to submit their tools and solutions with potential relevance to the live music value chain. Over the course of several weeks, the call was shared on social media, in partner newsletters, and at major sectoral events to maximize reach and diversity of applications.

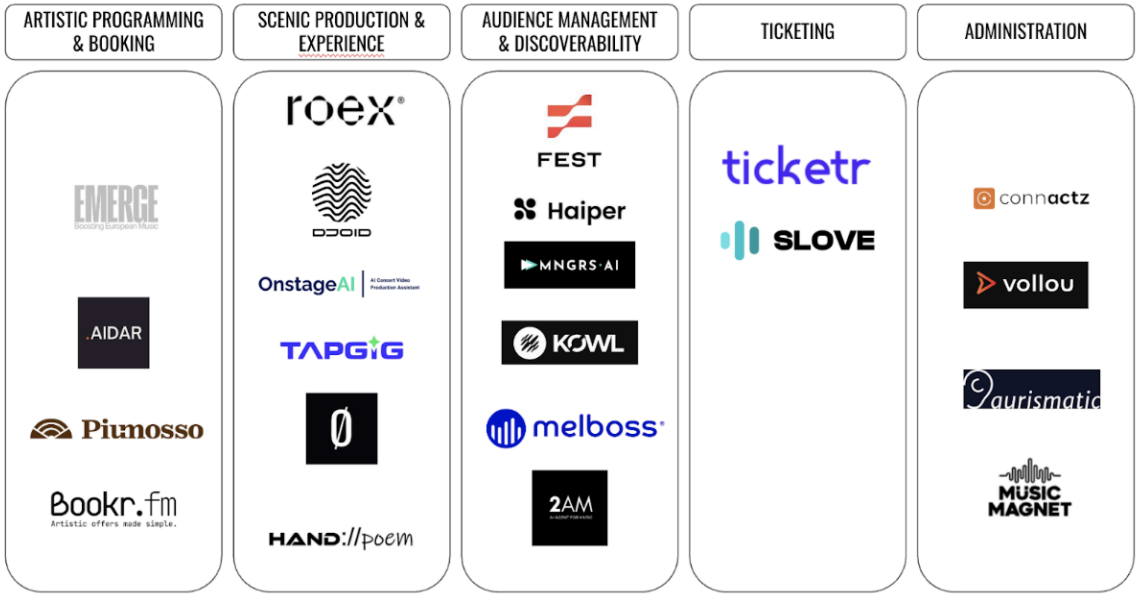
In parallel, we conducted interviews with professionals from the live music sector, both independently and during panel discussions held at major conferences such as WISE (Berlin), Wallifornia MusicTech (Liège), SoAlive (Sofia), ESNS (Groningen), and MIDEM+ (Cannes). These interactions provided valuable feedback on current practices, expectations, and real-world challenges.

The combination of bottom-up (open call) and top-down (expert interviews) approaches allowed us to compile a list of 32 submissions, of which 22 were identified as highly relevant to the specific needs and practices of the live music and music export sectors.

IMEMS initiative is rooted in continuous dialogue and a consultation process closely connected to both the live music sector and the European music tech ecosystem, which differentiates IMEMS from a market research. While global tours have started experimenting with AI, often to enhance fan engagement through immersive visuals, real-time personalization, or biometric analysis, this IMEMS study focuses on mapping actionable and accessible AI solutions that can be adopted and co-developed collaboratively across the European live music value chain.

5.2 Mapping of Emerging AI Solutions for Live Music & Music Export

As artificial intelligence (AI) continues to shape the future of cultural industries, its integration into the live music ecosystem presents a unique opportunity to address long-standing challenges and unlock new forms of value creation.
This section offers a breakdown of AI-powered tools mapped during the IMEMS project, highlighting their distribution across key segments of the live music value chain and identifying areas of strong innovation potential.



Distribution of AI Solutions by Category

Out of 32 submissions collected during the IMEMS call for entries, 22 tools were identified as directly relevant to the live music and music export sectors.

These were categorized as follows:

- Artistic Programming & Booking: 4 solutions
- Scenic Production & Experience: 6 solutions
- Audience Management & Discoverability: 6 solutions
- Ticketing: 2 solutions
- Administration: 4 solutions

Contextualizing the Mapping with Live Music Market Trends

The global live music market saw substantial growth in 2024, reaching an estimated $29.8 billion USD in revenue. Concerts accounted for approximately $12 billion, while festivals generated close to $8.5 billion, confirming the sector's continued relevance and economic weight.

This momentum further highlights the importance of innovation:
• The presence of tools focused on Audience Management & Discoverability responds to the increased competition for audience attention and the need for intelligent engagement strategies.

• Solutions in Scenic Production & Experience reflect growing demand for immersive, tech-enhanced live experiences, especially within large-scale touring and festivals.
Despite this, the live music sector still shows limited AI integration across day-to-day workflows. This mapping not only surfaces promising tools but also reveals critical gaps, especially in areas like ecological transition and administrative automation, offering clear targets for future support, investment, and R&D efforts.

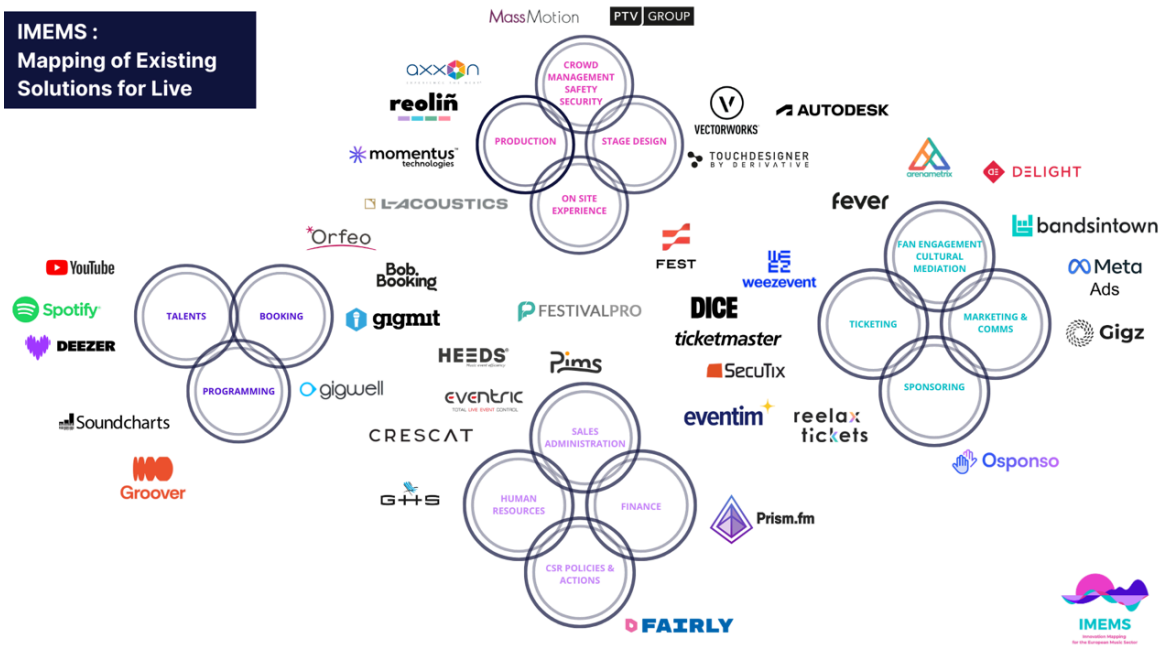
5.3 - Innovation in Context - Live Music Workflow Canvass

As we began our research, it quickly became clear that any meaningful mapping of AI-driven solutions had to be grounded in the real structure and daily operations of the live music sector. To ensure relevance and clarity, we opted to anchor our analysis in a workflow-based approach, identifying the different tasks and functional domains involved in the life cycle of concert production.

This includes not only the artistic and creative dimension, but also key logistical, administrative, and safety-related responsibilities. These activities are deeply interconnected and often reflect the complexity of operating within urban and territorial ecosystems, involving a wide range of stakeholders from public authorities to local infrastructure partners.

The construction of this workflow framework was done in collaboration with professionals from the field, notably through in-depth exchanges with EKHOSCENES, the French union representing private live performance organizations. Their feedback, along with that of their members, allowed us to better understand operational constraints, pain points, and the digital fragmentation that characterizes many of these processes.

This Live Music Workflow Canvass serves as a reference throughout the report, helping to contextualize each solution presented in section 5.2 and assess its alignment with real sector needs.



Positioning of AI Solutions within the Live Music Workflow

To complement the overview of existing tools and practices, we have mapped the 22 AI-driven solutions collected through the IMEMS call for entries onto the same live music workflow framework.

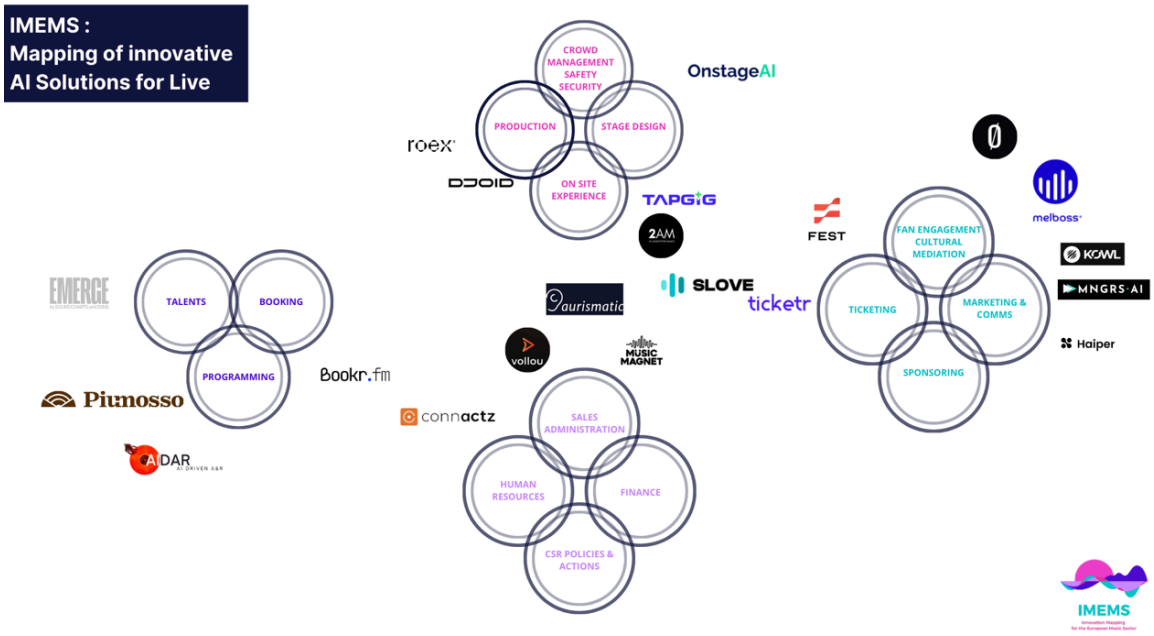
This integrated diagram allows us to visualize where these new tools position themselves within the sector's operations, which specific tasks or stages they aim to support, and how they interact with or complement existing systems already in use by professionals.

This cross-mapping also serves as a diagnostic tool to better understand the readiness and applicability of AI in the live music sector, and highlights emerging trends in technological development.

The mapping presented in this report reflects a first iteration of AI-driven solutions identified within Europe, based on submissions to our open call and selected for their relevance to the live music and music export sectors. The focus on European initiatives aims to strengthen regional collaboration, surface emerging innovations, and encourage interoperability within local ecosystems.

This comparative view helps identify areas of strong innovation activity:

- Gaps where no solutions currently exist
- Potential overlaps or redundancies
- Opportunities for interoperability and integration



Rather than presenting an exhaustive or static overview, this mapping should be understood as a starting point. It is part of an evolving process that IMEMS intends to expand and refine over time, particularly through continuous dialogue with professionals from across the sector. The ongoing stakeholder consultations and collaborative spirit fostered by initiatives such as LiveMX are essential in surfacing new needs, identifying gaps, and supporting the co-construction of future AI tools tailored to the live music context.

At the same time, it is important to connect this European-focused effort to the broader, international ecosystem of research and innovation. In particular, platforms like Water & Music in the U.S. are producing valuable insights into the rapidly evolving field of generative AI, with a strong focus on music creation, rights management, and broader music data ecosystems. Similarly, initiatives such as Fairly Trained are working to certify AI models that have been trained using fair and transparent datasets—offering a much-needed framework for ethical development and deployment of AI in creative industries.

These international resources offer important perspectives that complement IMEMS' regional focus. They can help guide future iterations of this mapping and ensure that Europe's live music sector remains connected to global conversations on responsible, inclusive, and innovation-driven transformation.

5.4 Analysis per segment & practices

The AI solutions identified through the IMEMS mapping have been categorized according to the key functional segments of the live music value chain. These segments were defined in close consultation with sector professionals, particularly during workshops held in collaboration with Ekhoscènes, the French national network representing private live performance organizations. This co-construction process ensured that the categories reflect the real operational structures and priorities of the industry.

This section presents a concise analysis of the solutions identified for each segment, highlighting areas of active innovation, needs addressed, and critical gaps. While certain categories show emerging activity, others remain underserved, offering clear opportunities for future development and experimentation.

A. Artistic Programming & Booking

This segment has seen meaningful innovation, especially in tools that support artist discovery, intelligent matchmaking, and collaborative programming workflows.

- **Bookr.fm** (Belgium) provides a comprehensive dashboard for festival programmers, integrating artist data from platforms like Spotify, Songkick, and Soundcharts. It allows for offer management, budgeting, and reporting—all in one place.
- **AIDAR** (Germany) is an AI-driven A&R platform that learns curators' preferences and automatically surfaces matching artist profiles.
- **Piumosso** (Germany) addresses the specific needs of classical music professionals, using AI to optimize the hiring of additional orchestra musicians.
- **Emerge** (France/Netherlands), initially developed by Soundcharts and ESNS for the sync market, also supports discovery through deep lyric and metadata analysis, with potential for live sector applications.

Key potential: AI-assisted artist scouting, collaborative booking platforms, remote show production

Remaining gaps: Wider adoption by smaller venues; integration with existing booking and CRM tools

B. Scenic Production & Experience

AI is increasingly being used to enhance visual and sound experiences during live performances, with tools ranging from generative video to real-time audio mixing and automation.

- **Automix** (RoEx) (UK) enables high-quality, AI-powered mixing of live multitrack recordings, including noise reduction and mastering.
- **OnstageAI** (Poland/USA) automates video capture of classical music performances by translating a scripted vision into dynamic, real-time camera movements.
- **Djoid** (Germany) supports DJs in AI-assisted curation and playlisting.
- **Hand://Poem** (Spain) explores new modes of expression with a MIDI-enabled glove that transforms gestures into music and visuals.
- **TapGig** (Germany) enables remote live performance production through cloud-based and AI-operated audiovisual systems, expanding access and reducing costs.
- **Origin Stories** (Netherlands) is a creative tech studio offering VPM, a simple AI-powered tool for managing visuals and storyboards in live music and multimedia. It streamlines production workflows

while ensuring high-quality, multi-format output. Designed for artists, festivals, and creative teams seeking efficiency without sacrificing creativity.

Key potential: Enhanced visuals and sound, adaptive production, immersive audience experiences

Remaining gaps: Scalability for small/mid-sized venues; need for accessible, modular setups

C. Audience Management & Discoverability

This is one of the most active and AI-ready segments, with tools supporting personalized marketing, fan engagement, and strategic content planning.

- **Kowl** (France) offers artists tailored release and promotion strategies, with data-backed tools such as a pitch generator and curator network integration.
- **FEST'AI** (France) centralizes information across global festivals and offers AI-powered recommendations to organizers and fans alike.
- **Lenny / 2AM** (France) is a real-time customer support chatbot designed for festivals and venues, integrating operational data and improving attendee communication.
- **MNGRS.AI** (France) acts as a digital manager, generating personalized promotional roadmaps for artists.
- **Melboss** (Spain) positions itself as a pocket-sized marketing agency for musicians
- **Haiper** (UK) offer generative video tools, enabling musicians to create live-reactive visuals and marketing content.

Key potential: Hyper-personalized outreach, streamlined campaign creation, data-driven artist growth

Remaining gaps: Data governance, user education, and integration across event platforms

D. Ticketing

While fewer tools are active in this category, early innovations suggest promising paths forward—particularly around distribution and data integration.

- **Ticketr** (France) is a SaaS platform that connects promoters with multiple ticketing services and resellers, breaking down technological silos to expand event reach and visibility.
- **SLOVE** (Sweden) combines AI-powered booking, event promotion, ticketing, and community engagement in a unified platform, aiming to serve small-to-mid scale events and venues.

Key potential: Unified ticketing ecosystems, wider reach via AI-optimized distribution

Remaining gaps: Transparency around dynamic pricing; integration with marketing, CRM, and access control systems

E. Administration

This segment has seen fewer AI tools but significant potential to streamline time-consuming, repetitive tasks in live event planning and operations.

- **Connactz** (Germany) automates gig scheduling, availability checks, contracting, and invoicing—all connected to team calendars.
- **Music Magnet** (Czechia) and Vollou (UK) use audio recognition to generate accurate reports of music played during DJ sets and live events—critical for ensuring correct royalty distribution.
- **Aurismatic** (Germany) focuses

specifically on automating live setlist reporting to collecting societies.

Key potential: Operational efficiency, better reporting, streamlined finance and licensing workflows

Remaining gaps: Broader tool adoption; better integration with existing back-office software

F. Focus on Music Export

AI as a Catalyst for International Reach and Strategic Planning.

Although not as densely populated in our mapping, several interviewees emphasized the strategic role AI can play in music export, particularly in tour planning, local market understanding, and cross-border collaboration. The few tools identified touch on data aggregation, recommendation systems, and collaborative intelligence for tour routing and market entry strategies.

> **"AI can streamline export strategies by filtering vast amounts of information to help artists and managers plot tour routes, identify key contacts, and find similar artists"**
>
> **– Jess Partridge, Executive Director, EMMA**

Observed Needs from the Sector

- Tour routing and international matchmaking based on audience data
- Tools to discover export partners, venues, and media in target markets
- Generative tools for export planning (marketing timelines, funding strategies)
- Assistance in building market-specific fanbases or identifying niche audiences

AI's Current Contribution

- Tour planning assistance based on audience heatmaps and stream locations
- Language-sensitive content generation tools (emails, bios, marketing copy)
- Tools offering similar artist detection across markets

Despite this, adoption remains low due to limited awareness, a lack of structured export strategy, and underdeveloped data usage among smaller artist teams.

Opportunities and Gaps

- Encourage tailored AI-based export planning platforms for managers
- Create shared data hubs for European export offices and promoters
- Promote collaboration with AI developers to bridge tech and market knowledge gaps

AI could significantly ease export-related work, but it must be paired with strategic education, data literacy, and market contextualization.

G. Focus on Ecological Transition and Impact Measurement

AI for Sustainability Metrics, Planning, and Resource Optimization

This segment remains one of the least developed in terms of available solutions, with only one mapped tool clearly positioned here. Nonetheless, it was consistently highlighted during interviews and workshops as a critical future direction. Stakeholders called for better tools to monitor, model, and reduce the environmental impact of live events.

> **"We're exploring predictive impact models to help users make early decisions to reduce or improve the footprint of their events... But injecting AI before we've modeled our objectives means taking a risk: focusing on the tool rather than the goal."**
>
> **— Maxime Faget, Director, Fairly**

Observed Needs from the Sector

- Predictive planning tools to model carbon, energy, or material impact
- Integration with existing sustainability scorecards or frameworks (e.g. Fairly Score)
- Dashboards visualizing logistics and energy trade-offs
- Support for scenario testing (e.g. hybrid vs. in-person only)

> **"Without a shared will and clear common objectives, putting machines to work in our place is taking the risk of going faster, but nowhere."**
>
> **— Maxime Faget, Director, Fairly**

AI's Current Contribution

- Prototype dashboards for environmental impact analysis
- Basic logistic optimization tools

While promising, these tools remain exploratory and need both regulatory backing and shared sectoral standards to scale.

Opportunities and Gaps

- Build common datasets and ecological metrics tailored to live music
- Fund pilot programs for sustainability-focused AI deployment
- Ensure AI solutions are themselves energy-efficient and ethically designed

The ecological application of AI in live music is still emerging but represents a high-impact frontier for innovation with growing urgency.

5.5 Context & MusicTech Market Trends

Global Music Tech Investment Landscape

According to recent studies, global investment in music tech is heavily directed towards B2B infrastructure, data analytics, and rights management. Notably, there is minimal focus on live music-specific technologies. This highlights a gap and an opportunity: leveraging AI-driven solutions tailored to the live sector's operational needs, aligning with broader trends of backend optimization seen internationally. Developing AI tools for live music could position Europe at the forefront of this underexplored area (source: Pitch Report).

IMEMS

Innovation Mapping
for the European Music Sector

06

Sectoral Consultation

To ensure a comprehensive understanding of the needs and challenges within the live music ecosystem, we engaged in an extensive consultation process with a variety of stakeholders. Our approach was primarily based on individual interviews, carried out in collaboration with the professional union representing private live music actors in France, Ekhoscènes. Through this cooperation, we organized workshops and conducted one-on-one discussions with their members, providing valuable insights into the operational realities of the sector.

Additionally, we capitalized on key industry events across Europe to meet stakeholders directly. These events included SoAlive (Sofia), Eurosonic ESNS (Groningen), WISE Conference (Berlin), MIDEM+ (Cannes), and the Wallifornia Music Tech Summit (Liège), among others listed in the first section of this report. Each occasion allowed us to gather perspectives from diverse actors, ranging from festival organizers and promoters to venue operators and tech innovators.

Beyond the core live music players, we extended our outreach to related sectors, focusing on crucial topics such as sustainability, AI ethics, and the broader implications of AI integration within cultural industries. Interviews with experts in these fields are reflected throughout this report.

Furthermore, we engaged with other representative organizations, such as LiveDMA, LiveEurope, and Pearle*, to ensure that the voices of varied stakeholders across the European live performance landscape were included. We also took into account feedback and insights shared during institutional events, particularly the Culture Compass consultation held in Brussels on March 20, 2025, which provided a valuable forum for professionals to express their views on innovation and AI. Additional exchanges with professionals on innovation topics throughout the project further enriched our understanding.

Importantly, we designed the individual interviews to cover the entire value chain of the live music sector. Our goal was to ensure representativeness across different functions—including artistic, administrative, marketing & audience engagement, and production & experience domains. We consulted a broad range of professionals occupying various roles within organizations, allowing us to capture the operational, structural, organizational, and cultural challenges tied to AI development both inside and outside the live sector.

Finally, it is essential to emphasize that future AI developments must be aligned with the sector's core values and guiding principles. A recent reference point is the 13 Guiding Principles for Fair Practice published by LiveDMA, which promote sustainability, diversity, equity, and ethical responsibility in the live music ecosystem. These principles can serve as an inspiration for both tech actors and live sector stakeholders to ensure that technological innovations, including AI-driven solutions, are designed and implemented in a way that supports a fair, sustainable, and inclusive cultural environment.

LiveDMA Guiding Principles Document

This multi-faceted consultation strategy allowed us to map a wide spectrum of insights, concerns, and opportunities that informed our analysis and recommendations.

6.1 Needs and Challenges

Throughout our sectoral consultation, several categories of needs and challenges emerged from the interviews conducted with various stakeholders across the live music value chain. These needs reflect both specific functional requirements by role and broader, transversal issues affecting the entire ecosystem.

1. Functional Needs by Profession

Different roles and professions within the live music sector expressed distinct operational needs. These can be categorized as follows:

- **Artistic Programming & Booking**: Needs related to optimizing artistic programming, improving matchmaking between artists and venues, facilitating booking processes, and better predicting audience interest.
- **Scenic Production & Experience**: Requirements for enhancing production workflows, logistics coordination, stage design, and enriching audience experiences during live performances.
- **Audience Management & Discoverability**: Tools to improve audience targeting, promote events effectively, personalize marketing, and facilitate audience engagement, including better data usage for discoverability.
- **Administration**: Simplification of administrative tasks, including financial management, rights management, and contractual procedures to reduce operational burden.

Additionally, a cross-cutting theme expressed across all professions was the need for greater automation and simplification of processes. Stakeholders highlighted how AI-driven solutions could help streamline these various roles, freeing up time and resources.

2. Cross-Functional Needs: Synchronization and Interconnection

A significant transversal challenge highlighted by stakeholders is the lack of coordination between the various digital tools currently in use. Each project often relies on multiple disconnected platforms for ticketing, promotion, audience engagement, administration, and production. This fragmentation creates inefficiencies and complicates data sharing.
Stakeholders expressed a strong interest in centralized management systems capable of synchronizing tools, making information actionable, and fostering shared intelligence across teams and partners. Developing interoperable solutions represents a key opportunity for improving workflow efficiency.

3. Intelligence and Project Monitoring

There is a growing need for tools that offer a holistic view of live music projects. While dashboards for streaming performance and social media trends already exist, stakeholders noted a gap in integrating live performance data—such as attendance, tour metrics, and audience engagement—with broader indicators like streaming, radio plays, and online discoverability. Enhanced AI-driven dashboards could serve both professionals and policymakers by providing insights into cultural practices and supporting more informed decision-making.

4. Productivity and Time Management

A recurring theme in interviews was the need to improve productivity and free up time. Live sector professionals

face intense workloads, operational unpredictability, and tight schedules. AI solutions that automate repetitive administrative and operational tasks have the potential to alleviate these pressures. Increased productivity would allow professionals to dedicate more time to artistic creation, audience engagement, research and development, fostering collaborations with other cultural sectors, and advancing sustainability initiatives.

5. Creativity, Experience & Accessibility

Several stakeholders expressed interest in leveraging AI to support new forms of artistic expression and audience experiences. Current tools for video, sound design, and audience interaction are often costly and accessible primarily to larger players. AI could democratize access to these creative tools, making it easier for independent artists, smaller venues, and emerging talents to enrich live performances, experiment with stage design, and interact with audiences in innovative ways.

6. Sustainability Considerations

While the role of AI in supporting sustainability in the live sector is still emerging, some stakeholders acknowledged its potential. AI could contribute to more efficient resource management, logistics planning, and environmental impact measurement. However, this remains a relatively underexplored area, offering room for further development.

These six key categories of needs outline the landscape for potential AI-driven solutions tailored to the specific challenges and ambitions of the live music sector. To address these needs, the sector could benefit from launching pilot projects in collaboration with tech providers, research labs, and cultural institutions. These pilots would serve as testing grounds for tailored AI solutions, helping validate their relevance, improve integration, and foster adoption among live music professionals.

6.2 Interviews and Testimonials

Insights from interviews with industry professionals, including producers, promoters, venues, festivals, and ticketing agents.

List of Organisations:

Ekhoscènes (FR) - Industry Body representing Private Live Performance organisations in France - Malika Séguineau

SoAlive (BG) - Music Showcase Festival & Conference - Ruth Koleva

Issue (CH) - Event Safety management - Pascal Viot

Fairly (FR) - Impact Measurement Service for the Live sector - Maxime Faget

Reelax Tickets (FR) - Ticketing Platform

Fever (ESP) - Global live entertainment discovery & ticketing platform

EMMA (EU) - European Music Managers Alliance - Jess Partridge

Daniel Fletcher (ESP) - Live Music & Innovation Expert

Viot Pascal

Director of iSSUE - Security Director at Paleo Festival

Pascal Viot is from 2006 Head of Department Safety, Security & Services at Paleo Festival Nyon (largest Openair Festival in Switzerland, established in 1976) managing more than 1'500 staff members during the event. He is one of the major players in event security on a European and international level, regularly called upon for conferences, seminars and groups of experts in his field. A member since 2008, he coordinates the YES Group, a group of event security specialists from the YOUROPE association of European festivals. Lecturer and Associate researcher at the Urban Sociology Laboratory at Ecole Polytechnique Fédérale de Lausanne, he published numerous articles and book chapters on Crowd management, Event risk management and Crowd policing.

Impact and Adoption

From your perspective, how is the Live Music sector currently relating to Artificial Intelligence and how do you see this new technology wave impacting your ecosystem in the near future?

From my perspective, the live music sector is only beginning to grasp the full implications of artificial intelligence, and its integration is still uneven across the ecosystem.

In the fields I'm most involved in — crowd management, event safety, and risk governance — AI presents both opportunities and challenges. On the one hand, AI has the potential to enhance predictive modelling (for crowd flows, weather risks, or crowd density thresholds), optimize staffing based on real-time data, and even support live incident monitoring through analytics, mapping and vizualisation. These tools can offer powerful support to decision-makers, especially when managing complex environments like large-scale festivals or urban events.

However, I also see a tendency in some parts of the sector to treat AI as a silver bullet — a technological fix for fundamentally human problems. Crowd behaviour, for instance, cannot be reduced to data patterns alone. Emotional dynamics, situational context, and cultural norms still play a central role, and we must be cautious not to overlook them in favour of purely algorithmic interpretations.

What's missing, in my opinion, is a cross-disciplinary conversation about how AI should be implemented, who controls it, and what ethical and operational frameworks we put in place to ensure it supports — rather than replaces — human

Key Sectoral Challenges and Needs

Based on your day-to-day practice in the field of Live Event Safety and Security, what are the main structural challenges and concrete needs within the sector that AI-driven solutions could potentially address? Any specific applications that you are excited about in the market?

Based on my day-to-day practice in the field of live event safety and crowd risk governance, several structural challenges persist in the sector — challenges that AI-driven solutions could potentially help address if deployed thoughtfully and in synergy with human expertise.

One of the main structural challenges lies in the fragmentation of information systems and operational responsibilities. Large events typically involve multiple stakeholders — public authorities, private security contractors, medical teams, production managers, artist crews — each operating with their own protocols and data silos. This can result in slow response times, inconsistent situational awareness, and a lack of shared understanding of risks as they evolve on site.

Here, AI-powered platforms could play a decisive role by acting as intelligent integrators — connecting data streams (crowd density, CCTV, weather, transport data, social media signals), prioritizing alerts, and supporting real-time decision-making through multi-agent coordination dashboards.

Another persistent challenge is the anticipation of dynamic crowd behaviour in complex environments, especially under uncertain conditions (e.g. artist delay, evacuation, sudden surge). Current crowd simulations tend to rely on static models, whereas AI could enable adaptive simulations, continuously recalibrated in real time based on actual crowd data and environmental signals. This would allow us to move from planning as hypothesis to planning as a living system.

More broadly, the sector lacks the ability to learn collectively and systematically from past incidents. Too often, feedback loops are closed only within individual organisations. AI, coupled with shared anonymised data repositories, could help build collective intelligence across the industry. For example, tools could be used to mine patterns from incident reports, near-miss logs or post-event debriefings, turning them into anticipation strategies or training modules.

Among the applications I find particularly promising:
Real-time video analysis systems for crowd flow monitoring and density estimation, now increasingly capable of differentiating behavioural signals (agitation, pressure build-up, stop-and-go patterns);
AI-assisted command center tools that help synthesize massive information flows and assist control room decision-makers in stressful situations;
Generative AI applications for scenario training: immersive, adaptive simulations tailored to different team roles, which could greatly enhance preparedness in a more engaging way than standard tabletop exercises.

That being said, I remain cautious about over-reliance on AI in high-stakes environments. The most promising systems are those that amplify human sense-making, rather than automate critical judgement. In the end, trust, coordination and shared mental models remain the cornerstone of safe and resilient events. AI can support that — but only if embedded in a robust governance and learning culture.

Transformation

In your opinion, what are the key factors but also blockers for a successful transformation of the sector in the realm of AI and what does the industry need to take advantage of such technology in a sustainable way?

In my opinion, the successful transformation of the live event sector in the realm of AI will depend less on the maturity of the technology itself — which is progressing fast — than on our collective ability to embed it in a culture of trust, responsibility, and operational relevance.

There are a few key enablers that will determine whether this transformation is meaningful and sustainable:

- **Cross-sectoral collaboration and data sharing**

The most powerful AI applications rely on large volumes of quality data. In the event safety and crowd management ecosystem, however, data is often siloed, under-exploited, or considered too sensitive to be shared. To unlock AI's full potential, the sector must foster secure and anonymised data collaboration frameworks, supported by trusted third parties and standardised protocols.

- **Human-centered system design**

AI tools will only be adopted if they are intelligible and useful to practitioners in real time — from control room operators to field supervisors. This requires inclusive design processes where users co-develop the tools and where AI outputs are explainable, not black-boxed. The technology must support — not replace — professional judgement, and adapt to the rhythm and language of field operations.

- **Education, training, and critical literacy**

We need to build AI literacy within the sector, not just in terms of technical skills but also in terms of strategic and ethical awareness. Decision-makers, producers, safety officers and public partners must be equipped to critically interpret AI outputs, question assumptions, and understand the limits of predictive models. Without this, there is a risk of blind trust or total rejection — both equally counterproductive.

- **Regulatory clarity and ethical frameworks**

The use of AI in live events — especially when it involves biometric data, surveillance or behaviour prediction — raises important legal, ethical and reputational issues. A clear framework is needed to ensure compliance with data protection laws (such as GDPR), but also to guide responsible innovation. Without this, risk-averse stakeholders might resist adoption altogether.

As for the main blockers, they often lie in structural inertia, short-term economic pressures, and a mismatch between technological promises and operational realities. In many cases, venues or festivals lack the internal capacity to test and deploy new technologies, especially when return on investment is uncertain or when solutions are designed without field expertise.

To overcome this, the industry needs to invest in trusted intermediaries and public-private partnerships that can bridge the gap between research, innovation, and deployment. Pilot projects, regulatory sandboxes, and shared experimentation platforms could all help in this regard.

In the end, the real challenge is not technological — it is cultural. AI must be understood not as a silver bullet but as a support system, deeply embedded in the professional cultures and social dynamics of event production. Its success will depend on our ability to integrate it thoughtfully into existing risk governance models — with humility, critical thinking, and a constant feedback loop between experience and innovation.

Maxime Faget
Direction - Fairly

Impact and Adoption

How is the Music sector currently relating to Artificial Intelligence currently and how do you see it impacting your ecosystem in the near future?

AI impacts the content of our industry (music itself and its production) and the services and professions that revolve around it in different ways.

I can't judge the actual impact AI has on artistic creation today. But as for all the services surrounding it (ticketing, management, production, etc.), the music sector, like many other service industries, is pursuing a quest for automation and time savings. However, the effectiveness of the proposed solutions remains to be demonstrated for certain services (for instance the proliferation of "AI agents" does not always replace work where human decisions are key, and whose complexity cannot always be automated).

This current "rush" toward AI will undoubtedly give rise to several good ideas and applications that will still be around in 10 years or more, but probably (as with any innovation of this kind) a large number of concepts will be abandoned along the way. This doesn't call into question the potential benefits of AI for our businesses. But we must ask ourselves, for each new supposed "revolution" in a service, whether it is as useful as claimed. And also whether the associated costs outweigh the benefits (the ecological cost, which is well-established and should give us pause, and the often-ignored adoption cost, which involves either time or money, and often both).

Key Sectoral Challenges and Needs

From your perspective, what are the main structural challenges and concrete needs within the Live Music sector that AI-driven solutions could potentially address? Any specific applications that you are excited about in your field / for your venue / for your festival ?

Generally speaking, the potential for increasing the predictive capacity of our systems through machine learning seems positive, especially for any business or project requiring adaptability to external variables or streamlining internal processes. But having the sharpest knife in the world won't do you much good if your menu is

soup. So I expect a few gems and many abandoned projects. Similarly, many blockchain and Web3 projects have remained at the promise stage, their viability being less fully developed than the disruptive effect they offered.

In my opinion, AI is useful when it increases the speed of completing tasks whose operation is clearly defined beforehand. For example, if we consider the copyright redistribution system : The potential benefits are obvious for applications that would accelerate the recognition of a song played on a platform, its association with an artist, rights holders, and the appropriate redistribution channel, the transmission of this information to the appropriate office, and the triggering of payments in the correct amount.

AI can certainly be used to accelerate and streamline this chain of actions. But the intelligence that determines the terms of these decisions, the amounts, etc., does not depend on AI but on the parties forming the various links in the industry.
As with blockchain a few years ago, the central question is therefore: how do institutions and platforms function, what are the governance and redistribution choices that we can subsequently model, secure, and accelerate using technologies such as AI.

If we want to improve the working conditions and quality of work in the music industry, the necessary work rests on fundamental questions of organization, value sharing, rights defense, and preservation of creative conditions.
The fact that AI streamlines and accelerates is a good thing, if this dynamic applies to making laborious tasks easier, or to encouraging creative diversity, to making our systems more efficient and therefore less wasteful in terms of energy and resources.

Transformation

In your opinion, what are the key factors but also blockers for a successful transformation of the sector in the realm of AI and what does the industry need to take advantage of such technology in a sustainable way?

Again, we must always ask ourselves the question of the benefits and also the timing of integrating technological innovation in relation to our field of activity.

In the case of Fairly Score, our task is to model the ecological, economic, and social impact of live music production (festivals, concert venues, tours), and to help live music operators create and produce in a more sustainable manner.

It is therefore interesting for us to start thinking now about using a predictive impact model. This will allow our users to make early decisions to control, reduce, or improve the impact of their events. That's why we've initiated discussions and studies on this potential.

However, injecting this layer of innovation before having finished modeling the objectives we want to achieve is taking a risk: that of focusing on the tool rather than the goal. The impact of our industry is a complex problem, with multiple factors and actors. Without a common will, without specific shared objectives, putting machines to work in our place is taking the risk of going faster, but nowhere.

I therefore believe in the value of AI solutions to support our work at Fairly, to improve our calculations and make our interfaces more immersive (potentially even via guides and chatbots that are tailored and consistent to our users and their needs).

But this must be done under two conditions:

- They must bring to fruition in-depth work on the meaning and challenges of our project.
- They must not create more damage through overconsumption of resources than we mean to repair through a project designed to make our industry more sustainable and more lasting.

Lignel Maxime

co-founder - REELAX TICKETS and ANTOR

Passionate about music and technology, Maxime co-founded Reelax Tickets in 2019 to protect fans from scam and ticket touts. Today, Reelax Tickets is the leading secure resale platform in France, partnering with over 300 festivals, venues, and producers. In 2023, he also launched Antor, a new-generation ticketing software alongside major players of the live music industry.

Impact and Adoption

How do you see Live Music professionals currently relating to Artificial Intelligence and how do you see this new technology wave impacting your ecosystem in the near future?

Currently, I feel that generative AI and machine learning are being adopted by large companies in the live industry, which have dedicated data processing departments, or by industrial players like L-Acoustics, the French leader in professional sound systems. These technologies are used to enhance their services and products or to improve their profitability.

Additionally, some artists are using generative AI to offer new immersive experiences during their concerts and to boost their creativity. This trend is not limited to South Korean artists, recently, David Guetta made headlines by using an AI-generated Eminem voice during one of his DJ sets.

Furthermore, the more tech-savvy segments of the ecosystem are likely exploring the automation of administrative tasks and integrating AI-driven solutions into their customer service operations.

In the future, I hope that generative AI can benefit everyone in the ecosystem, regardless of their size, by offering greater efficiency and facilitating the deployment of immersive and personalized experiences before, during, and after the show.

Key Sectoral Challenges and Needs

Based on your day-to-day practice in the field of Live Music Ticketing, what are the main structural challenges and concrete needs within the sector that AI-driven solutions could potentially address? Any specific applications that you are excited about in the market and/or your roadmap?

In the ticketing sector, generative AI can transform how audience data is processed, enabling more ticket sales by targeting the right people, identifying "superfans," determining the best times to launch ticket sales, and more. It can also automate parts of customer service, generate personalized advertising campaigns, and improve the productivity of technical teams. For our part, as a ticketing platform, beyond the most common use cases, we are considering using AI to generate venue seat maps and to predict when a show will be sold out by leveraging all available data from both primary and secondary ticketing markets.

Transformation

In your opinion, what are the key factors and blockers for a successful transformation of the sector in the realm of AI, and how do you see the evolution of the relationship between innovative players like REELAX and the industry moving forward?

While many professionals seem convinced of the potential impact of generative AI, there is still a long way to go before AI becomes a tool that truly enhances the live industry. I think that the lack of skills required to implement specific use cases, combined with the constant evolution of models do not help ecosystem players to invest in this technology.

To overcome these challenges, I believe that tech companies with a deep understanding of the live industry have a crucial role to play. By supporting the ecosystem in this transformation and offering relevant use cases based on agnostic and open-source technologies, they can help the industry stay up-to-date and benefit from these innovations.

Dario Garcia Garcia
VP of Data - FEVER

Fascinated by the power of data to drive meaningful experiences, Darío García joined Fever in 2022 as VP of Data to lead the company's global data strategy. Prior to Fever, he directed Machine Learning Research at Netflix, where he worked on personalization systems at scale.
Darío also spent over five years at Facebook, first driving computer vision programs and later leading AI applied research, building systems that shaped how billions interact online. From banking to big tech, his career spans continents and industries, always at the intersection of innovation, data, and impact.

Impact and Adoption

From your perspective, what are the main structural challenges and concrete needs within the Live Music sector that AI-driven solutions could potentially address?Any specific applications in the fields of Fan Engagement & Discoverability ?

There are several challenges along the live music sector's value chain that could benefit significantly from AI and related data technologies:

- **AI-powered Demand Generation**: Given the level of competition in this space, precision-targeted marketing—both in terms of audience segmentation and creative assets (images, videos, copies, etc.)—is key to capturing the attention of the right audiences at the right time. AI lowers the cost of generating assets and thus enables personalization at a more granular level than what was economically viable before

- **Revenue Optimization**: Although "dynamic pricing" sometimes suffers from a negative reputation due to misuse, it remains a key mechanism for effectively matching supply and demand. The industry needs responsible, controllable pricing algorithms that leverage both large-scale historical data and real-time signals to optimize pricing in an effective and transparent manner.

- **Operational Efficiency**: AI enables the optimization of staffing and internal operations in a profound way that can impact both the economics and the safety of events. For example, AI could be used to monitor and balance queues for food & beverages—through economic incentives or staff reallocation—to avoid both missed sales opportunities and reduce physical crowding.

- **Fan Engagement and Discoverability**: AI is transforming fan engagement, event discoverability, and user loyalty by delivering personalized, data-driven experiences that keep audiences engaged before, during, and after events. AI-powered recommendation engines analyze user behavior, preferences, and past attendance to suggest highly relevant events, ensuring fans discover experiences they genuinely want to attend. After the purchase, real-time interactions enabled by AI—through dynamic content, gamification, etc..— foster a deeper relationship between fans and events. This, together with follow-up recommendations, targeted VIP offers, and more, significantly helps turn casual attendees into loyal, repeat customers

Key Sectoral Challenges and Needs

Based on your day-to-day practice in the field of Live Music Ticketing, what are the main structural challenges and concrete needs within the sector that AI-driven solutions could potentially address? Any specific applications that you are excited about in the market and/or your roadmap?

The technology to perform all sorts of advanced analytics,—ranging from forecasts to real-time interventions—has been around for a while in many sectors and has been progressively making its way into live entertainment, particularly in music.. What AI brings to the table now is the ability to bridge the gap between data and decision-making.

Traditionally, there was significant friction to act based on data in certain scenarios due to communication costs (i.e., how to transform the output of algorithms and models into actionable insights) and the costs associated with the required interventions (e.g., fine-tuning creative assets). Much of that friction is now being removed. Companies and organizers who want to thrive in this new world will need to find the right balance between the unique human aspects of the entertainment space and the efficiency and objectivity offered by data and AI.

Jess Partridge
Executive Director - EMMA

Impact and Adoption

From your perspective, how are Live Music & Music Export currently relating to Artificial Intelligence and how do you see this new technology wave impacting your ecosystem in the near future?

In these particular areas it's clear that there is still much potential to be explored. With so much focus on generative AI in music, we're excited to see where AI can impact other elements especially of live music and export. Some particular areas that we see impact at the moment and in the future:

- AI can streamline export strategies by filtering vast amounts of information to help artists and managers plot tour routes, identify key contacts, and find similar artists. These capabilities exist, but many aren't leveraging them due to a lack of strategic planning around export and growth.

- In the near future, AI's biggest impact will likely be on show-adjacent aspects like marketing, tour planning, and international audience development rather than live performance itself. Generative AI can create structured and individualised strategies, activities, and timelines—e.g., auto-generating a targeted 4-week marketing plan for a show with actionable steps. This can have a huge impact on the success of shows and therefore the development of exporting artists.

- Although some work has been done in this area we see good potential for AI to ease the process of collaboration in the near future - making it easier to connect with like-minded musicians in new markets—critical for export but currently challenging for artists and managers.

- From the audience side there's also good potential - with AI enabling better discovery and personalisation, helping fans find and attend international artists' shows based on their preferences. With so much music distributed every day, a greater focus on discovery can really help build new audiences especially internationally.

- Another area of exploration that is beginning to grow is AI's impact on live performances themselves - this could include generating instrumental scores from digital tracks, enhancing live sound adaptation for different venues, and refining backing track integration.

Key Sectoral Challenges and Needs

Based on your members' experience across the EMMA network, what are the main structural challenges and concrete needs that AI-driven solutions could potentially address? Any specific applications that you are excited about ?

- Across the EMMA network, members consistently highlight challenges in planning, financial management, marketing, and administration - key areas that AI has the potential to drive significant improvements. Beyond the innovations already discussed, managers recognise that AI could play a transformative role in several broader areas of responsibility.

- Planning and strategy remains a major pain point for artists and managers, particularly for building effective live performance plans and audience development strategies. AI can already generate tailored recommendations by analyzing vast datasets, but the industry lacks widespread education and implementation. The ability to process more nuanced data inputs will be critical to making these recommendations more precise and actionable.

- Financial management, especially in touring budgeting, is another area where AI-driven solutions could alleviate pressure. With multiple stakeholders involved in both the income and expenditure, AI could help streamline forecasting, optimise budgets and provide real-time financial insights, to alleviate some of the managerial responsibilities.

Ruth Koleva

Founder & Head of Program - SoAlive Music Conference / Sofia Live Fest

Impact and Adoption

From your perspective, how are Live Music and most specifically Music Export professionals currently relating to Artificial Intelligence and how do you see this new technology wave impacting your ecosystem in the near future?

- From what I see in Bulgaria and the region, there are very mixed feelings when it comes to AI in music. Some professionals and artists are excited and say, “whoever jumps on it first will have the advantage,” while others are more skeptical and feel unsure how it can help in their day-to-day work.
- In the export field, people are still learning what AI really means and how it can be used. We are starting to see more interest in tools for music discovery, audience targeting, and data analysis. But in general, the knowledge is still limited. There is a strong need for training and better understanding of how AI could actually support our work.
- From the neighbouring rights side, where I am also involved, we are already seeing a lot of AI-generated music being registered. Especially in the public performance and production music areas (like TV background music, commercials, etc.), there is a growing amount of content that is machine-made. This raises a lot of concerns about the future of copyright and performer remuneration. If this continues without clear regulation, it could seriously harm the creative sector.

Key Sectoral Challenges and Needs

What are the main structural challenges and concrete needs within your sector and practices that AI-driven solutions could potentially address? Any specific applications that you are excited about?

- In Southeast Europe, we deal with limited resources, small teams, and a lack of access to international networks. AI can be a helpful tool to reduce the workload —for example, automating parts of the communication, analytics, or funding application processes.

- For export, the biggest challenge is visibility. Our artists are often overlooked, and AI could help balance this by improving music recommendation systems and giving space to artists from underrepresented regions. I am especially excited about tools that can map fanbases or suggest the best new markets for a certain artist. These would be very helpful in the export process.

Transformation

In your opinion, what are the key factors but also blockers for a successful transformation of the sector in the realm of AI and what does the industry need to take advantage of such technology in a sustainable way?

For AI to really transform our sector, people need to feel included and not scared. In many cases, the tools feel like they are built for big companies or the "tech-savvy," and that leaves others behind. Also, in our part of Europe, funding and infrastructure are still catching up.

The main blockers are access, lack of education, and a feeling that AI might replace jobs instead of supporting the people doing them. The industry needs a framework that focuses on using AI with humans, not instead of them. We also need regulations and guidelines to make sure AI use respects copyright and artistic identity.

Any specific call-to-action for the musictech ecosystem and for policy makers?

To the musictech community: Transparency needs to be at the core of every AI-based tool. We are deeply concerned about platforms like Suno, which generate full songs with no clear attribution or ownership framework. If creators and rights holders don't know where the data is coming from, who gets credited, and how the revenues flow, it becomes impossible to protect creative work or build trust in these tools.
Similarly, platforms like Spotify must be transparent about how playlists are generated and what role AI plays in surfacing music. At the moment, many artists—especially from underrepresented regions like ours—feel completely left out of these systems. If algorithms are making curatorial decisions, we need to know what inputs are used and how diversity and geographical balance are factored in.
To policymakers: please prioritize regulation and funding that ensure AI in music is fair, explainable, and accountable. Support should go beyond innovation—it must also protect creators and ensure smaller players in the ecosystem have a chance to compete. We also urge policymakers to involve experts from our region when designing these frameworks, so that the needs of all parts of Europe are taken into account.

Malika Séguineau
General manager - Ekhoscènes

AI and the live performance sector: crossroads

While artificial intelligence is expanding into all activities of our societies and technological advancements are succeeding at a dizzying pace, those involved in live performance must anticipate these transformations, question them, and guide them. Our union, Ekhoscènes, is fully invested in this mission.

Culture and live performance must not become ancillary; they must continue to create connections between people and provide them with emotions.
To do so, our companies, most of which are small, must embrace the possibilities offered by AI in their operations, not lag behind the productivity gains it offers, and thus avoid a second "cost disease". They must be able to do so in a thoughtful, conscious manner, mindful of social and environmental balances.

Moreover, the rise of artificial intelligence highlights the need for a solid political and regulatory framework to preserve the ecosystem of live performance, its creativity and its diversity. In particular, the recognition of intellectual property rights for the producer of live shows is a prerequisite for any projection of the sector into a world transformed by artificial intelligence.

AI and the day-to-day operations of live performance companies: opportunities and levers

Today, AI is used relatively sparingly in the day-to-day operations of live performance companies, which are mostly small businesses. However, entrepreneurs in the sector are open to AI's potential and see it as a powerful tool to improve the efficiency of a large number of their activities:

- The creation of live shows;
- Their programming in venues and festivals;
- Audience management (marketing, promotion);
- Ticketing;
- Administrative management;
- Public management (flows, optimization of waiting times, personalized services, communication of essential information);
- Event security;
- Site and infrastructure management (venues and festivals).

Ekhoscènes supports several ways alongside its members to assist them in this transition:

- By helping them to understand the available AI solutions for the sector and their impact on the skills needs of their businesses. In this respect, Ekhoscènes applauds the IMEMS project. In addition, Ekhoscènes collaborates with Afdas, the French training and skills operator for the culture, creative industries, media, communication, telecommunications, sport, tourism, leisure, and entertainment sectors. Together, we have recently launched a panoramic and prospective study on innovative technologies used in private live performance companies and their impacts on their needs for skills.

- By seeking to build stronger links between live performance companies and innovative companies so that the solutions the latter develop better meet the needs of professionals. We particularly support the essential actions of the Musi Tech network, which promotes dialogue between Live and Tech and acts as a relay to transmit the needs of live performance companies to the ecosystem of innovative companies.

- By placing environmental issues at the heart of all technological developments.

A preliminary question: recognizing and protecting the investment of show producers

To date, show producers have no intellectual property rights over the shows they have created. They are remunerated solely by ticket sales. Ekhoscènes has long advocated for the recognition of this right, which would acknowledge and protect the investment of show producers.

Show producers take the risk of investing massively in the creation of live shows, several months or even several years before their launch. Their investments extend into many areas:

- The creation of the show with the artist (artistic direction, scenography, lighting, set construction, costumes);
- The organization of rehearsal periods in real conditions in rented venues with many people involved (artists, musicians, and technicians) which can stretch over several months. These "residencies" not only allow the show to be calibrated but also to perfect its conception;
- The definition of the tour strategy: target audiences, types of venues to rent, ticket prices, communication strategy, etc.;
- The rentals of venues, sometimes necessary years in advance;
- The implementation of the communication campaign;
- The commercialization of show tickets, which must be organized to start many months before the event.

For a long time, the show producer was the only one able to earn profit from their shows. The show could not be diverted for the benefit of third parties other than the audience present at the venue where the show was performed.

This has become untrue for several years with the rise of online broadcasting of live shows. The recordings of shows, over which show producers have no intellectual property rights, are now widely broadcast on social networks and video platforms. The show has become an intangible asset.

The absence of intellectual property right for show producers becomes even more incomprehensible with the rapid rise of AI. Firstly, we see that recorded music, audiovisual, and cinema, although legally protected, struggle to defend their intellectual property rights, especially the exploitation of their creations as training data. Show producers, on the other hand, find themselves completely helpless, deprived of basis for legal action, in the face of the exploitation of their shows by AI engines. Secondly, AI opens up multiple technological pathways to renew the creation and dissemination of shows. How could live show companies engage in and consent to massive investments in future technologies if nothing guarantees that they can commercially exploit them?

Daniel Fletcher

Independent Strategy Consultant, (previous, Chief Innovation Officer at Primavera Sound) - Multiple

Impact and Adoption

How is the Live Music sector currently relating to Artificial Intelligence and how do you see it impacting your ecosystem in the near future?

The current state of the live music industry, marked by soaring production, logistics, and artist costs that aren't always passed on to the fan, demands the exploration of innovative, digital, and data-driven approaches to enhance efficiency and predictability. However, it is crucial to avoid the homogenization that can result from overreliance on algorithms; if widely adopted without caution, these tools risk rendering live music experiences unimaginatively uniform and, ultimately, extremely boring.
The live music industry is beginning to explore artificial intelligence (AI), with forward-thinking organizations and creators testing its potential to enhance creative workflows, operational efficiency, and audience engagement. While AI adoption remains in its early stages and is not yet a widespread necessity, it is showing promise in several experimental areas. For example:

Creative Execution

AI is being conceptualized / tested in real-time adaptive systems that respond to environmental and audience inputs. For instance:

- Machine learning algorithms are under development and test to adjust audio mixing based on venue acoustics, potentially reducing manual calibration efforts.

- Lighting rigs equipped with computer vision are being prototyped to synchronize with performer movements, enabling dynamic productions to scale across diverse venues.

Creative Process

Generative AI is being explored to support artistic tasks. Examples include:

- Algorithms analyzing streaming data and social media sentiment to suggest setlists that balance popular tracks with lesser-known songs.
- Diffusion models converting lyric sheets into visual mood boards for lighting and video design, accelerating the creative process at major festivals.
- Prototyping alternative show scenographies, sponsor activations, and generating graphic and video assets.
- AI-powered composition and creation tools assist writers and producers in harmonization, arrangement, mixing, mastering, and sound design.

These applications are still experimental, assisting rather than leading creative decision-making.

Operational Workflows

AI is showing early potential in optimizing back-office tasks:

- Natural language processing tools are being tested to extract key terms from rider agreements, automating venue compliance checklists.
- Workforce scheduling systems are in development to analyze historical patterns and propose efficient shift rotations.
- Streamlining budgeting and settlement activities, and automating core administrative processes
- Assisting in the design of the event layout.
- AI agents for customer support and fan engagement. A potential application could also be a network of AI agents to govern and orchestrate scattered data through the Live value chain.

These efforts aim to reduce administrative burdens, though they are not yet standard practice.

Ticketing and Demand Forecasting

Some ticketing platforms and startups are experimenting with predictive models to improve inventory management:

- Systems analyze factors like artist social media engagement and regional event calendars to forecast demand and secondary market trends, aiming to enhance pricing accuracy.

While promising, these models are still being refined and are not universally adopted.

Strategic Decision Support

AI-driven market intelligence tools are emerging to aid executive decisions:

- Selecting potential destinations for festivals, shows and tours.
- Platforms aggregate data streams to provide insights, such as simulating economic and risk scenarios for tours, festivals or venue acquisitions using generative adversarial networks and real time access to market indicators.
- Designing marketing strategies and pricing tiers.

These use cases remain limited to testers and early adopters but could hint at a shift toward data-driven strategies.

To summarise, the key potential use cases are:

Ticket Pricing Optimization: AI analyzes historical sales, artist popularity, and external factors like weather to implement dynamic pricing strategies. For instance, it adjusts prices in real-time to maximize revenue while ensuring optimal sales, addressing the challenge of demand forecasting. However, if these systems are misconfigured, they can result in excessively high ticket prices, potentially harming the reputations of artists, promoters, and platforms.

Attendance Prediction: By leveraging past data and online behavior, AI predicts event turnout, aiding organizers in resource allocation and venue planning. This could be relevant for managing large-scale events efficiently, but also for grassroots venues and emerging artists.

Personalized Marketing Campaigns: AI can tailor marketing messages to potential attendees based on music preferences and past attendance, boosting ticket sales and enhancing fan loyalty. This personalization could be relevant to deepening audience engagement, also providing fans with new avenues for artist discovery.
Crowd Flow Management: Machine learning can predict crowd behaviors and movements, designing efficient entry/exit routes and allocating resources to ensure safety, especially during high-attendance events.

Security Enhancements: AI can analyze real-time video footage to flag suspicious activities, enhancing safety for attendees and staff, which is vital for large venues and events. Additionally, by leveraging digital twins and crowd behavior algorithms, a “safety by design” approach can be integrated from the initial stages of event layout planning.

Artist Selection: AI can assess artist popularity, past performances, and audience preferences to recommend acts likely to draw crowds, thereby enabling promoters to make data-driven decisions. However, a less positive aspect is that these AI tools could lead to a homogenization of live music offerings, potentially hindering the emergence of innovative and diverse acts.

Understanding Audience Preferences and next-gen curation: By analyzing data from social media, ticket sales, and feedback, AI can tailor events to audience tastes, guiding artist selection and venue layout for maximum enjoyment and engagement. Additionally, AI-driven artist recommendations have the potential to introduce audiences to new and emerging acts that align with their underlying taste patterns, even if these artists or genres are outside their usual explorations.

Real-Time Insights: During events, AI can monitor social media mentions and sentiment, providing immediate feedback for on-the-spot adjustments, such as altering lighting or sound based on audience reactions.

Post-Event Analysis: AI can evaluate metrics like attendee engagement, ticket sales, and social media buzz post-event, assessing success and informing future planning to continuously improve the fan experience.
Streamlining Processes: AI can automate tasks like ticket sales tracking, access management and registration, scheduling, and contract creation, saving time and reducing errors, such as in venue promoter agreements.

Enhancing Live Performances: AI can improve performances by managing sound and visuals. It can analyze venue acoustics in real-time, adjusts sound levels and effects, and controls lighting and visual effects synced with the music. Also, some AI powered tools can provide artists with new ways to experiment during live shows.

AI’s role in live music is nascent but growing, with experiments paving the way for a more efficient, insight-led industry. Adoption is far from ubiquitous, and many applications remain in testing phases.

Key Sectoral Challenges and Needs

From your perspective, what are the main structural challenges and concrete needs within the Live Music sector that AI-driven solutions could potentially address? Any specific applications that you are excited about in your specific field ?

The live music industry faces systemic challenges rooted in fragmented data ecosystems, opaque market practices, and technological inertia, issues that artificial intelligence is uniquely positioned to address. While AI offers transformative potential, its implementation must balance operational efficiency with artistic integrity and market diversity.

Core Structural Challenges

1. Market Opacity and Data Fragmentation

The absence of centralized data on ticket sales and artist fees creates inefficiencies:

- Unlike real estate's unified listing systems in some countries or other similar open or semi-open data platforms in other industries, live music lacks an open and standardized shared data framework to train AI models on.
- AI could support standardized data-sharing protocols to improve transparency, but this requires industry-wide cooperation.

2. Disjointed Fan Engagement Ecosystems

Social media platforms dominate fan relationships, creating data ownership asymmetries:

- Most promoters rely on Meta/Instagram analytics for targeting, losing ownership of first-party data.
- TikTok-driven viral moments rarely translate to sustained fan loyalty for live events.
- Direct-to-fan (D2F) tools remain underdeveloped compared to other entertainment activities, such as sports.

This dependency limits personalized engagement and forces artists to rebuild their audiences across platforms. The entire industry is now striving to crack the code of audience generation to accurately predict live show and merch sales because followers, lean-back and active listeners, fans, and ticket & merch buyers are not necessarily the same.

3. Digital Illiteracy and Risk Aversion

Many venue operators and promoters lack data skills and fear AI might standardize programming. Literacy-first AI tools, such as user-friendly assistants, could bridge this gap by simplifying data use without dictating creative choices.

Potential AI-Driven Solutions and Applications (some examples)

- **Transparent Marketplaces**: Federated learning could enable insights across organizations without sharing raw data, fostering fairness.
- **Fan Data Platforms**: AI could curate direct-to-fan ecosystems, reducing reliance on social media.
- **Discovery Engines**: Bias-aware AI could promote diverse talent, countering homogenization fears.
- **Skill-Building Tools**: No-code interfaces could make AI accessible to non-technical users.

Caution: These ideas are long-term possibilities, not immediate fixes. Implementation must preserve creative diversity and avoid ethical pitfalls, such as over-reliance on algorithms.

Transformation

In your opinion, what are the key factors but also blockers for a successful transformation of the sector in the realm of AI and what does the industry need to take advantage of such technology in a sustainable way?

Companies that have embraced meaningful and robust digital technologies and integrated data strategies have consistently enjoyed competitive advantages. Industries that have done the same are fostering innovation, attracting new market entrants, and creating new revenue streams. In markets where proprietary data has been partially opened up and systems integrated across value chains, this openness has led to the development of innovative business models and a healthier, more competitive ecosystem that benefits all stakeholders. There is a significant opportunity in the live music sector to enhance efficiency, expand market reach, and help mid-market artists earn a sustainable income. However, for these benefits to materialize, the initiatives must come from the current incumbents who control the data flows, rather than through mandatory legal frameworks forcing the opening of proprietary information.

Key Enablers of Transformation

A risk-averse cultural mindset can limit innovation and stifle progress. In many industries, including live music, a cautious approach often prevails, with decision-makers preferring to rely on proven methods rather than venturing into untested territory. This tendency to avoid perceived risks can result in missed opportunities for creative disruption, hindering the adoption of new technologies and strategies that could drive significant improvements..

Embracing a more balanced perspective, one that carefully weighs potential benefits against risks, could unlock new avenues for growth, efficiency, and competitive advantage. By fostering an environment that is open to calculated risks, organizations can more readily explore innovative solutions, diversify revenue streams, and ultimately shape a more dynamic and resilient industry landscape.

Transforming the live music industry with AI requires addressing enablers and blockers thoughtfully. The focus should be on practical steps forward, not overhyped promises.

Enablers of Transformation

- **Collaborative Data Ecosystems**: Secure, ethical data-sharing frameworks (e.g., open APIs) could unlock insights if stakeholders agree to participate.
- **Human-Centric AI Design**: Tools should augment, not automate, human roles to maintain creative control.
- **Literacy-First Pathways**: Simple training tools and interfaces can ease adoption among industry professionals.

Persistent Blockers

- **Data Silos**: Proprietary control by ticketing and social media firms limits transparency, requiring voluntary collaboration to overcome.
- **Cultural Resistance**: Difficulty attracting innovation roles, fear of losing artistic uniqueness, and misunderstanding AI's role may be slowing progress. The live-music sector also has a limited presence in the MusicTech ecosystem. Additionally, the seasonal and often one-off nature of tours and festivals discourages experimentation, there's little appetite for testing new technologies that could fail and leave no time to respond.
- **Regulatory Gaps**: General laws like the EU's AI Act lack specifics for live music. For example, if a festival misused biometric data (e.g., emotion tracking via wearables), it could breach privacy without clear guidelines.

Path Forward: The industry can leverage AI for growth and efficiency by starting with small, practical solutions, like data-sharing standards, while investing in skills training and advocating for tailored regulations. This balances innovation with the sector's creative core.

Impact of AI Adoption on Employment in the Live Music Sector

If adoption of AI powered tools accelerates in the music industry we will inevitably see how workforce dynamics reshape, creating both opportunities and challenges for employment. While AI promises operational efficiencies and new creative possibilities, its adoption will likely lead to significant shifts in job roles, skill requirements, and team structures across functional areas.

Functional Area Transformations (some examples)

Marketing: Precision Over Scale

AI-driven tools are automating audience segmentation, campaign optimization, and content personalization, reducing reliance on large marketing teams. Machine learning algorithms now can process streaming data, social media trends, and historical ticket sales to:

- Generate targeted ads with higher conversion rates than human-crafted campaigns
- Automate multilingual promotional copy for global tours.
- Predict viral moments using sentiment analysis of social posts.

While entry-level content creation roles may decline, demand will grow for AI Marketing Strategists who interpret algorithmic outputs and oversee ethical data usage. Smaller teams could then be be focused on strategy oversight rather than execution.

Legal Operations: Efficiency vs. Expertise

Contract management systems powered by natural language processing (NLP) now can:

- Review rider agreements in minutes instead of hours manually.
- Flag clause conflicts with high accuracy using case law databases.
- Generate royalty distribution schedules across multiple territories.
-

This automation could dramatically reduce junior paralegal positions in a few years from now. However, demand will surge for AI Rights Specialists addressing novel challenges:

- Navigating copyright disputes over the use of AI.
- Establishing legal frameworks for biometric data collected via audience wearables.
- Negotiating “AI rider” or other clauses in artist contracts.

Operational Workflows: Leaner Teams, Higher Complexity

Venue and event management AI can handle, for example:

- Real-time staff scheduling using crowd density heatmaps.
- Predictive maintenance of sound and other systems and facilities via IoT sensors.
- Automated incident reporting compliant with local safety regulations.
- Automated inventory prediction and allocation for F&B.

This means that fewer operations staff could manage events through AI-assisted tools. However, these systems require Hybrid Technicians skilled in both traditional venue operations and AI troubleshooting.

The Human Advantage in Live Experiences

Despite automation trends, irreplaceable human skills will dominate frontline roles.

For example:

- Artistic Direction: lineup curation, and curating AI-generated visual concepts into coherent narratives.
- Crisis Management: Resolving conflicts where algorithms misinterpret cultural nuances.
- Audience Empathy: Translating raw biometric data into emotionally resonant experiences.

IMEMS

Innovation Mapping
for the European Music Sector

07

Conclusions and Recommendations

Early-Stage AI Development in Live Music

Challenge:
The development of AI solutions for the live music sector is still in its early stages, presenting a landscape full of potential for experimentation and innovation.

Recommendation:

- Facilitate cooperation and experimentation between research labs, industry professionals, and European MusicTech networks.
- Encourage cross-sector collaboration to align AI solutions with the specific needs of live music professionals.
- Recognize that AI developments in live music align with broader trends in music technology, where current innovations focus on infrastructure, marketing, workflow management, and administrative tools, as opposed to previous waves centered around Web3, Metaverse, and blockchain.
- Highlight the opportunity for AI-driven solutions to serve a wide range of organizations, from SMEs to larger entities, by optimizing infrastructure, backend operations, and workflow management.
- Explore the potential for technology transfer from the live music sector to other cultural industries, such as theater, broader performing arts, event management, and museum visitor experiences, creating a cross-sectoral impact and fostering best practices across cultural fields.

Licensing and Copyright Issues

Challenge:
There is currently no established copyright framework for live performances, which has kept the AI and live music debate relatively underexplored. This represents both a gap and an opportunity.

Recommendation:

- Initiate discussions at European and international levels to define guidelines and standards for AI applications in live performances.
- Establish frameworks for AI-driven stage design, performance elements, and production to ensure responsible and ethical development.
- Advocate for regulatory policies that enable AI innovation while safeguarding artistic integrity and rights.

Developing AI-Compatible Live Music Databases

Challenge:
There is a disparity in how data is handled across the live music sector, with a lack of structured databases at both local and international levels. This fragmentation limits AI's potential to support the industry effectively.

Recommendation:

- Develop a European-wide live music event database, creating a shared listing accessible to AI solution providers under clear governance and economic models.
- Establish a venue database with details on capacity, safety, and acoustics to support AI-driven event planning and logistics.
- Build a comprehensive database of live music professionals to enhance networking and matchmaking between industry needs and expertise.
- Explore sustainability-focused databases to mutualize resources and equipment, reducing unnecessary costs and waste in the live sector.
- Define the governance structure, funding mechanisms, and accessibility rules for these datasets to ensure long-term viability and ethical use.
- Position these databases as a key opportunity to interconnect and interoperate with other cultural sectors, enabling cross-referenced intelligence and shared knowledge between live music, recorded music, and other cultural industries.
- Consider their potential role in supporting cultural policy-making at local, regional, and European levels, by providing data-driven insights to better understand industry challenges and inform targeted interventions.
- Align this initiative with ongoing discussions on the European Music Observatory and the Culture Compass consultation held in Brussels on March 20, 2025.

Training, Support, and Capacity Building

Challenge:
The live music professionals interviewed for this study have expressed a strong willingness to better understand the opportunities offered by artificial intelligence and to grasp the associated implications for their profession. However, they face significant limitations in terms of resources and time, which hinder their ability to fully engage with these topics. There is a clear need to develop their skills, competencies, and understanding of AI applications relevant to the live performance sector.

Recommendation:
- Implement a "capacity building" approach, aligning with the United Nations' definition of developing skills and resources for industry professionals.
- Establish a European resource center for AI in live music, offering training programs, professional development initiatives, and accessible tools for stakeholders.
- Facilitate the development of educational materials and workshops tailored to the specific contexts and challenges faced by live music professionals.
- Provide platforms for peer-to-peer learning and knowledge exchange to strengthen collective expertise and foster a community of practice around AI adoption in live music.

Strengthening Research and Innovation Links

Challenge:
Live music industry players often lack the internal resources, financial capacity, and technical expertise to independently adopt and deploy research and development strategies. As a result, they must rely on external resources to integrate AI-driven solutions into their operations.

Recommendation:
- Adopt an open innovation approach by fostering cooperation between live music professionals, research institutions, and innovation networks.
- Leverage the expertise and resources of the MusicTech Europe network to facilitate partnerships between AI developers, academic researchers, and industry stakeholders.

- Promote collaborative R&D projects that provide live music professionals with access to cutting-edge AI innovations while ensuring that solutions are tailored to their specific needs and constraints.
- Develop funding mechanisms to support AI experimentation and deployment within the live music sector, ensuring accessibility for small and medium-sized players.

Call to Action

SHORT-TERM ACTIONABLE INITIATIVES

- **Facilitate Ongoing Dialogue on AI's Impact in Live Music.** Establish recurring formats including roundtables, workshops, or online forums that bring together professionals from the live music sector, tech developers, and public bodies to connect real-world needs with AI innovation. Prioritize sector-led conversations that demystify AI and focus on concrete use cases.

- **Structure and Curate the AI Solution Offer.** Develop an accessible, navigable platform to help live professionals identify relevant AI tools, categorized by use case, function, and compatibility. This includes curating a living directory of trustworthy, transparent solutions and usage guides to reduce friction in adoption.

- **Enable Experimentation and Field Testing.** Launch low-risk pilot projects in collaboration with festivals, venues, and tech providers. These should test AI tools in real contexts on programming, production, or admin workflows and document learnings to co-create emerging standards in line with European values.

MID-TERM ECOSYSTEM & POLICY ORIENTATIONS

- **Develop European Standards for AI in the Cultural Sector**
  Use the insights from field experimentation to support the co-construction of European-wide guidelines and standards for AI use in live performance. Ensure alignment with values of diversity, accessibility, sustainability, and fair remuneration.

- **Institutionalize Collaboration Between Culture & Tech**
  Create permanent spaces for collaboration between the cultural and innovation sectors through innovation hubs, public–private partnerships, and EU-funded sandboxes to ensure AI is shaped by sector expertise, not imposed on it.

- **Promote Equitable Access to Innovation**
  Design support mechanisms (funding, training, mentorship) to ensure small and mid-size players - venues, grassroots festivals, independent producers - can participate in shaping and benefiting from AI innovation, avoiding a two-speed digital transformation.

- **Establish the live music sector as a laboratory for AI-driven innovation**
  Foster best practices that can be expanded to other cultural and creative industries, ensuring an inclusive approach that integrates public authorities, regional policymakers, and urban stakeholders in shaping the future of live performance and AI-driven experiences.

By addressing these key areas, the live music sector can harness AI to navigate its challenges, enhance sustainability, and drive forward a more resilient and innovative industry landscape.