PETZI MEMBERS SURVEY 2025 – KEY FINDINGS

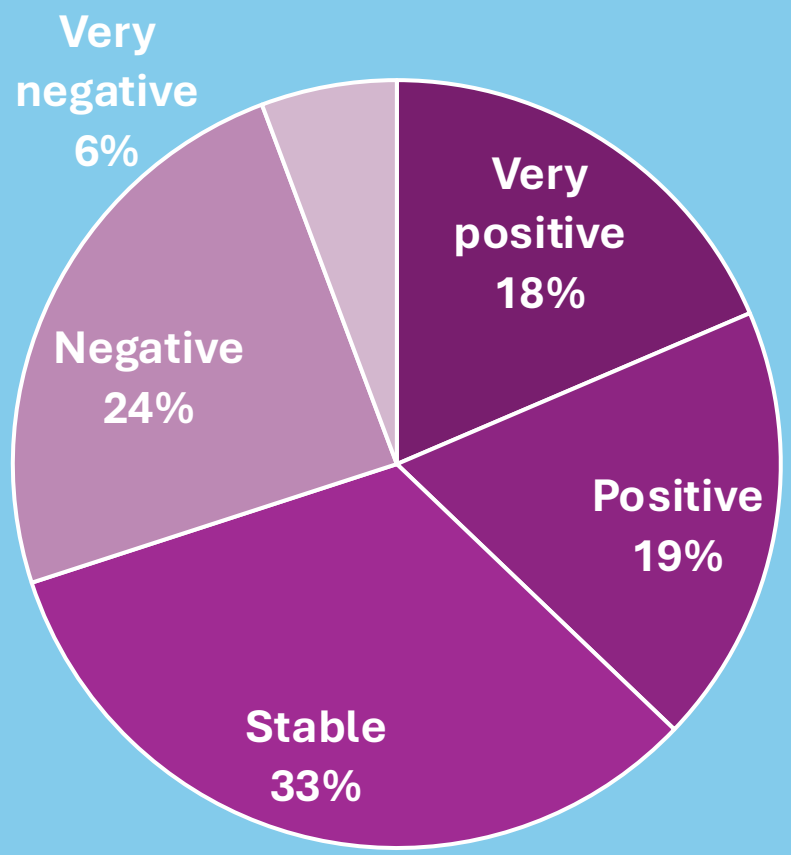
Petzi

VERBAND SCHWEIZER MUSIKCLUBS UND FESTIVALS
FÉDÉRATION SUISSE DES CLUBS ET DES FESTIVALS DE MUSIQUES ACTUELLES
FEDERAZIONE SVIZZERA DEI CLUB E FESTIVAL DI MUSICA
SWISS FEDERATION OF MUSIC VENUES AND FESTIVALS

DO WE HAVE A CRISIS? – OR IS THE SYSTEM OUT OF BALANCE?

In December 2025, PETZI conducted a survey among its members. The aim was to obtain an up-to-date picture of the situation of the Swiss live music ecosystem. Depending on the question, between 40 and 70 members from different regions of Switzerland participated.
The survey provides insights into key developments in recent years: audiences, revenues, cost developments, funding structures, workload and structural challenges.
The results show a clear picture: demand for concerts remains stable in many places, while structural pressure on organizations is increasing significantly.

CONCERTS AUDIENCE DEVELOPMENT SINCE 2022



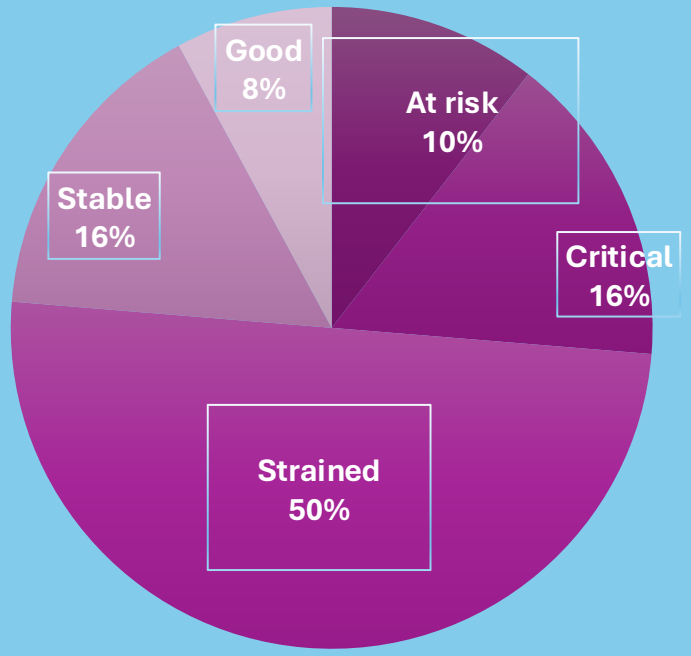
The results of the member survey show a differentiated picture of the current situation.

A large majority of PETZI members report stable or positive developments in concert attendance since 2022. **Around 70% of organisations observe stable or increasing audience numbers**, while about 30% report negative developments.
These results show that audiences are fundamentally still present. The challenges facing the scene therefore lie less in the demand for concerts, and more in the structural framework conditions of the system.

SOURCE: PETZI MEMBER SURVEY DEC 25 – N = 70

ECONOMIC SITUATION

How would you describe your current economic situation?

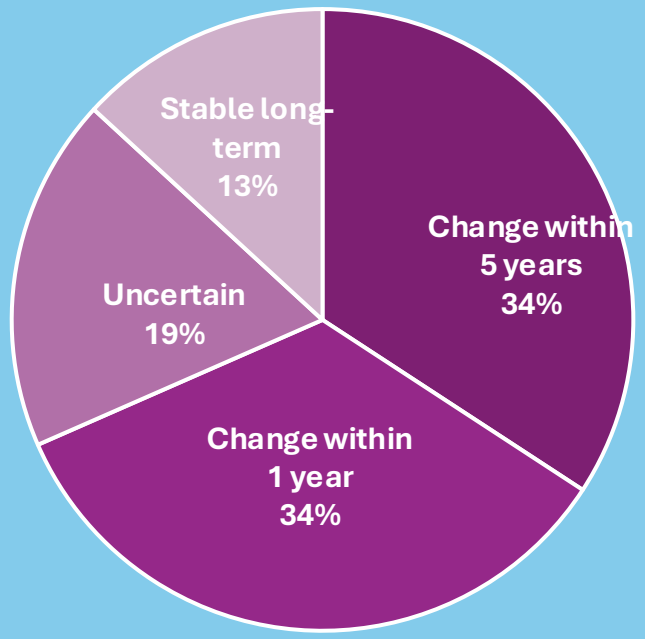


The economic situation of many members is strained. More than three quarters of members are under financial pressure or facing a critical financial situation.

SOURCE: PETZI MEMBER SURVEY DEC 25

OPERATIONAL STABILITY

For how long can you continue operating with your current financial inflows (income, funding, etc.)?



The survey shows that many organisations expect fundamental changes to their operations. **Around two thirds of members believe they will need to make structural adjustments within the next 1–5 years.**

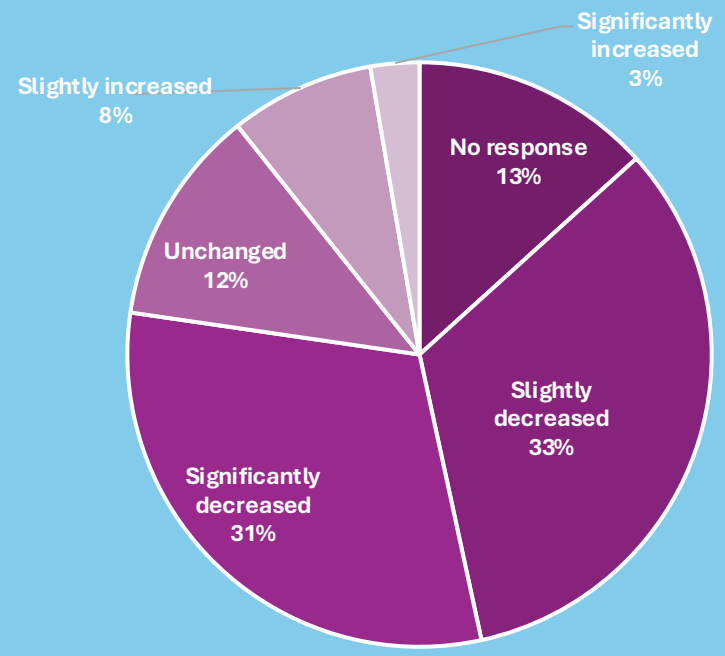
This assessment is closely linked to the economic situation described above. The strained financial situation of many organisations is putting increasing pressure on existing operating models.

The survey results indicate that many organisations will need to adapt their structures and working methods in the coming years in order to remain stable in the long term.

SOURCE: PETZI MEMBER SURVEY DEC 25

DECLINE IN F&B REVENUE

How has bar consumption evolved at your venue (since 2022)?



The current survey shows that more than 70% of members observe declining Food & Beverage revenue.

An earlier PETZI member survey from 2019 shows that F&B revenues account for **43% of organisations' total income** (Live DMA Report – *Facts & Figures 2019–2022*).

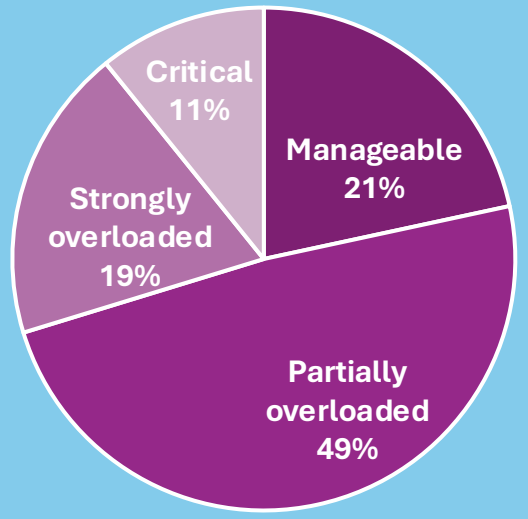
F&B therefore represents the most important revenue category for many clubs and festivals.
A decline in this area therefore has a direct and significant impact on the overall revenues and financial stability of organisations.

SOURCE: PETZI MEMBER SURVEY DEC 25

STRUCTURAL OVERLOAD IN THE SYSTEM

The survey shows a strained economic situation for many organisations alongside a high workload within teams. Limited financial resources restrict the ability to increase staff capacities, which contributes to structural pressure within organisations.

How would you assess the current workload of your team?



>> Nearly 80% report high or critical workload levels

Pressure of Self-Exploitation

Over 75% experience noticeable to permanent pressure to maintain operations through additional unpaid effort.

Health impact on structural overload

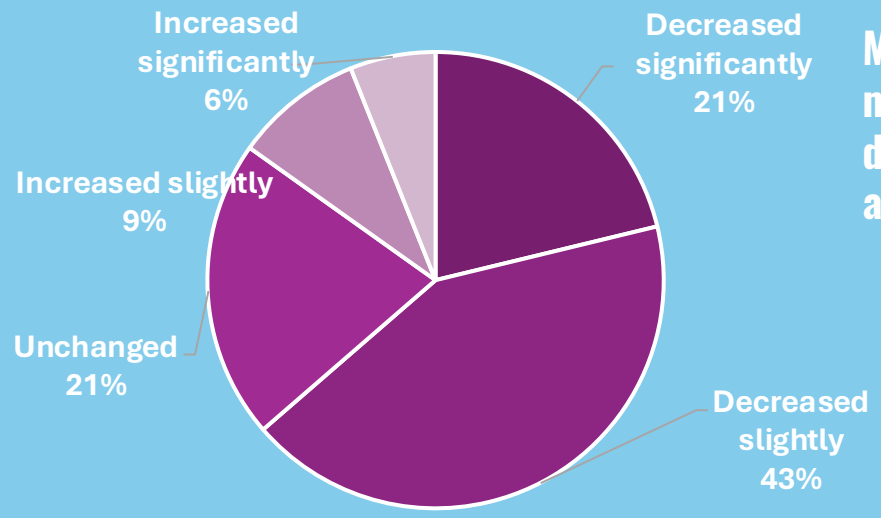
More than half (52.6%) report longer illness- or exhaustion-related absences in their teams since 2022.

SOURCE: PETZI MEMBER SURVEY DEC 25

VOLUNTEERING UNDER PRESSURE

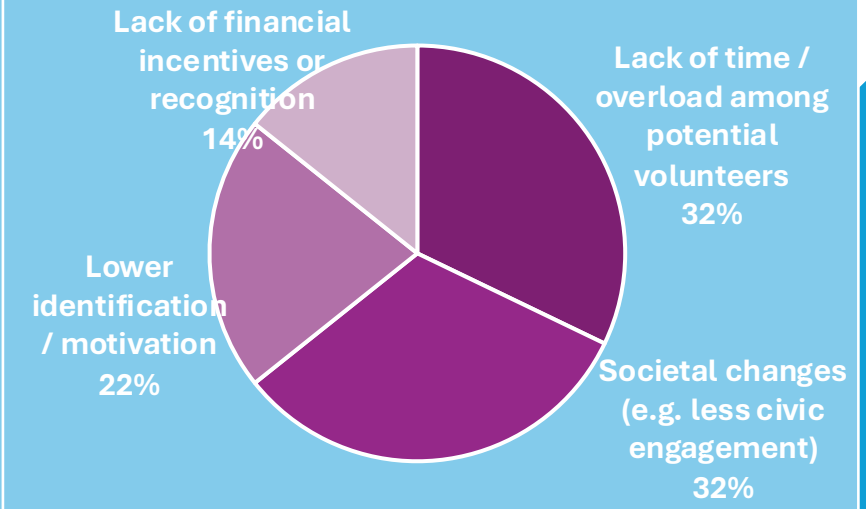
Volunteer work is a central element of the organisational structures of many PETZI members. The 2019 PETZI survey shows that around 72% of staff are volunteers and that volunteers account for 50% of total working hours (FTE).
However, the current survey indicates that many organisations are experiencing a decline in volunteer availability.

How has the availability of volunteers changed since 2022?



More than half of the members (55%) report a decline in volunteer availability.

What factors lead to difficulties in volunteer engagement?



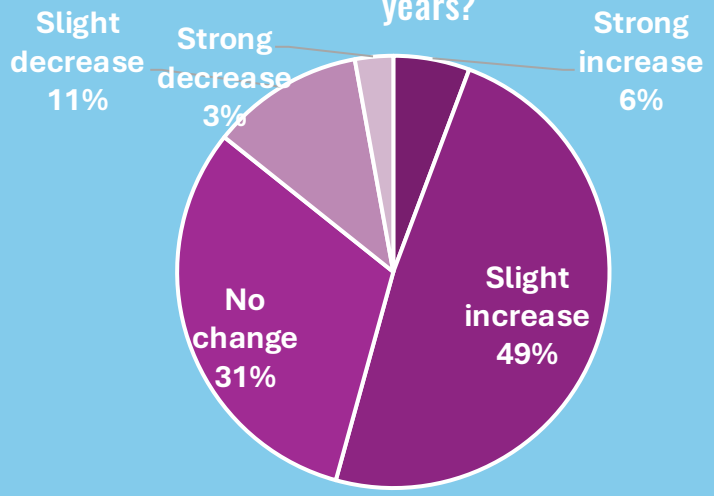
SOURCE: PETZI MEMBER SURVEY DEC 25

PUBLIC FUNDING – CHANGES & DRIVERS

The PETZI member survey from 2019 shows that around 21% of members' income comes from public funding. Around 79% of revenues are generated through their own activities, particularly through Food & Beverage and ticket sales. The current survey shows that public funding has increased for the majority of members, but only to a limited extent.

DEVELOPMENT OF FUNDING

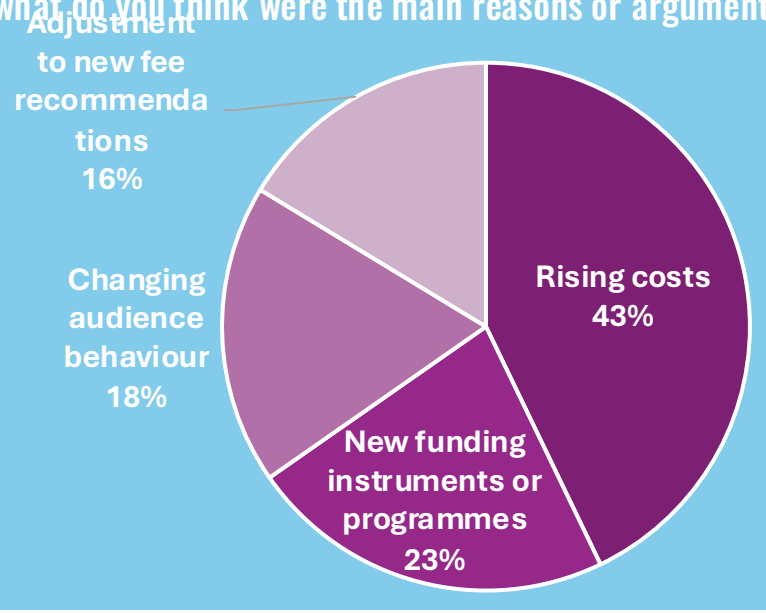
How have public or private funding sources developed over the past five years?



Funding levels have mostly remained stable or slightly increased over the past five years.

REASONS OF FUNDING INCREASES

If funding has increased or is expected to increase in the near future: what do you think were the main reasons or arguments for this?



SOURCE: PETZI MEMBER SURVEY DEC 25

THE FUTURE OF THE LIVE MUSIC ECOSYSTEM

The results of our survey point to a structural crisis in the live music ecosystem:

Demand for concerts remains largely stable, while many organisations face structural challenges in financing, workload and volunteer engagement.

Independent venues and festivals form the foundation of the live music ecosystem. They create the spaces where artistic creation, cultural diversity and community engagement emerge across Switzerland.

For 30 years, PETZI and its members have contributed to building and sustaining this ecosystem.

Strengthening these foundations remains essential for the future of live music.