

# The State of European Music

Report 2022



## Radar

European Charts  
& Festivals insights

# The state of European music

By Oskar Strain

Booker and ESNS Radar Project Manager

One year after launching ESNS Radar, we are proud to present the first edition of *The state of European music: Report 2022* – a digital publication that provides unprecedented insight into the state of European music. Following the tracking of artists and developing an open access database, we have taken the time to reflect on what this new resource can reveal – and present examples of how to delve into ESNS Radar and ESNS Analytics to mine data gems.

ESNS Radar is a publicly available charts platform that automatically tracks airplay, streaming services and the bookings of over 130 festivals included in ESNS Exchange, with plans to expand that scope in the coming years. What was the impact of European talent in the last year? Journalist Menno Visser unveils five border-breaking surprises from the ESNS Radar charts. Looking back at a year's festival season, how have emerging European artists been performing in line-ups? *IQ Magazine* Editor Gordon Masson offers observations on emerging artists on the rise and which festivals are most open to booking new acts.

Following the route of international success, EMEE Research Coordinator Virgo Sillamaa examines the importance and effectiveness of European music export programmes. Reflecting on the industry's urgently-needed response to the climate crisis in 2022, A Greener Festival Director Teresa Moore draws out four emerging themes in live music's green journey.

Digging a little deeper, the delegate-access-only ESNS Analytics offers insight into how specific artists are performing in active music markets as well as streaming and social media platforms globally. To demonstrate how industry professionals and artists can use this tool, music professional Erwin Blom and *Music Week* Features Editor Ben Homewood analyse the surge in success for ESNS22 artists Personal Trainer and Wet Leg in the past year.

Looking ahead, the future looks bright for the realm and possibilities for the data platform. Expanding the scope of festivals tracked, launching the ESNS Radar app and a growing documentation of the music industry lie ahead. For now, we invite you to explore and discover the insights compiled in this digital publication – and to visit [radar.esns.nl](https://radar.esns.nl) to venture forward.

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**Looking forward to 2023** by Teresa Moore



# Five border-breaking surprises from ESNS Radar

What if we had monitored the impact of European talent last year? Which acts broke through via radio or streaming? What was the hit of last year's ESNS Festival? Well, actually we did track that via the ESNS Radar chart. It is the place where you can explore success outside the country of origin, based on radio airplay and streaming figures. Here are five lessons we learn from the 2022 Year-end chart:

By Menno Visser  
Journalist and radio professional

## 1 If you're non-UK, make a dance record

Obviously, the UK is a dominant music force in Europe. British pop star **Harry Styles** with 'As It Was' (Sony) is king of the chart, but there are no less than sixty other songs from British origin in the Top 100. There is something interesting when you look at the genres from songs of the rest of Europe inside the Top 100: two thirds of those can be labelled under dance, from Belgian dance pop act **Lost Frequencies** at #3 to French dance producer **Gesaffelstein** at #100.

Another notable fact: six of the remaining 14 entries outside the UK that are not dance pop, are famous because of the Eurovision Song Contest: for example, Italian rock stars **Måneskin** have even three entries in the Top 100.



Måneskin

## 2 Success can be yours without singing in English

If you're a real phenomenon like Spanish flamenco pop singer **Rosalía** or Belgian pop singer **Stromae** you might be able to have pan European success singing in Spanish or French: we find Rosalia at #41 with 'Despechá' and at #88 with 'La Fama' (both Sony) and **Stromae** with 'L'Enfer' (Universal) at #78. But that is a real exception, like Eurovision Song Contest winner **Kalush** even singing in Ukrainian on 'Stefania' (Sony) at #79. Others, like British rapper **Benzz** just add some French buzzwords on 'Je M'Apelle' (Universal) at #46, and sing the rest in English.

But the Emerging artists chart – made for new artists whose first release was less than three years ago – is filled with no less than 22 entries of acts who sing in languages other than English. These artists mainly find success in neighbouring countries who share the same language. For example, French rapper **Gazo** has four entries in the Emerging chart, because his songs are liked in Belgium, Luxembourg and Switzerland too.



Rosalía

## 3 Rock is not dead, it lives on radio

Diving even deeper into the data, there is a distinction visible between airplay and streaming data. If we only look at the airplay data, there are six rock tracks which appear only in the airplay chart. Those are by British rock artists Foals (twice), **Sam Fender**, **Liam Gallagher**, **Yungblud** and **Alt-J**. Looking at exclusively at airplay in the Emerging artist chart, British indie rock band Wet Leg even appears five times inside the Top 30, while they don't appear when looking exclusively at streaming.



Sam Fender



Yungblud



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4

## Win an MME Award for a brighter future

Sometimes it may take a while, but laureates of the Music Moves Europe Award will ultimately find success. This award is the European Union-funded prize that celebrates European emerging artists.

Of the 2023 MME winners, Belgian rock band **The Haunted Youth** is already visible in the 2022 Emerging chart at #78 with 'Broken' (Mayway). The achievements of Spanish singer **Rosalía**, who won an MME in 2019, were already mentioned. Italian dance producers **Meduza**, MME winners in 2020, are at #44 with 'Bad Memories' (Universal). And Belgian hip hop act **Lous And The Yakuza**, MME winners in 2021, can be found twice in the Emerging chart with 'Kisé' at #55 and 'Monsters' at #58 (both Sony).



Lous And The Yakuza



Wet Leg



Yard Act

5

## The ESNS Exchange programme predicts chart success

The ESNS Exchange programme checks which ESNS acts are most booked on European festivals. In 2022, Swiss R&B pop singer **Priya Ragu** and British post-punk band **Yard Act** were both the winners with eleven bookings. Their live appeal is reflected in the Emerging chart: **Priya Ragu** appears at #34 with 'Illuminous' (Warner) and **Yard Act** even has two entries with 'The Overload' at #92 and '100% Endurance' at #92 (both Universal). Other acts that played ESNS 2022 which appear in the Emerging chart are British rock band **Wet Leg** with no less than five entries, Irish singer-songwriter **Cian Ducrot** and Belgian rock band **The Haunted Youth**. Remember, last year's ESNS was just an online edition, so the future is even brighter this year.



The Haunted Youth

This analysis is based on data from January 1 until November 1, 2022  
For methodology please visit <https://radaresns.nl>



# ESNS Radar chart

ESNS Radar charts present the latest border-breaking data on European artists, powered by SoundCharts.

ESNS Radar presents three charts: All European artists chart; Emerging artists chart with artists who exclusively released their first single in the past 36 months; ESNS artists with artists who played ESNS in the past three years.

The results combine the airplay impact of 62 European Broadcasting Union (EBU) radio stations in 41 European countries and streaming positions from available Spotify and YouTube country charts. Find the list of radio stations tracked on [radar.esns.nl](https://radar.esns.nl). The website also features the recently launched TikTok Chart for frontrunning music on the social media platform. The chart will be included in next year's report. All the charts presented on ESNS Radar are border-breaking charts; this means that we focus solely on the impact outside the artists' home countries.

The charts exclusively track European artists. These are all artists that originate from the 27 European Union countries, in addition to Albania, Andorra, Bosnia and Herzegovina, Georgia, Great Britain, Iceland, North Macedonia, Moldova, Montenegro, Norway, San Marino, Serbia, Switzerland, and Ukraine.



\* Data includes information from January 1st - November 1st  
 \*\* Data is based on available EBU Airplay & Streaming (from YouTube and Spotify) data  
 \*\*\* ESNS Chart includes Artists from ESNS 2020, 2021 and 2022 lineup  
 \*\*\*\* For more details on methodology please refer to [radar.esns.nl/about](https://radar.esns.nl/about)

## All European artists per year Airplay & Streaming

TOP10

1		<b>DAVID GUETTA</b> <sup>FR</sup> <b>I'M GOOD (BLUE)</b> AT BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD NL NO PL PT RO SE SK SM UA
2		<b>HARRY STYLES</b> <sup>UK</sup> <b>AS IT WAS</b> AT BA BE BG CH CZ DE DK EE ES FI FR GB GE GR HR HU IE IS IT LT LU LV MD MEMT NL NO PL PT RO RS SE SI SK SM UA
3		<b>ROSA LINN</b> <sup>AM</sup> <b>SNAP</b> AT BA BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD MT NL NO PL PT RO SE SI SK SM
4		<b>ELTON JOHN</b> <sup>UK</sup> <b>HOLD ME CLOSER</b> AT BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD NL NO PL PT RO SE SK SM UA
5		<b>TOM ODELL</b> <sup>UK</sup> <b>ANOTHER LOVE</b> AT BA BE BG CH CZ DE DK EE ES FI FR GB GR HU IE IS IT LT LU LV MD NL NO PL PT RO SE SI SK UA
6		<b>JAMES HYPE</b> <sup>UK</sup> <b>FERRARI</b> AT BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MT NL NO PL PT RO SE SK SM
7		<b>HARRY STYLES</b> <sup>UK</sup> <b>LATE NIGHT</b> AT BA BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD MT NL NO PL PT RO RS SE SI SK SM
8		<b>CENTRAL CEE</b> <sup>UK</sup> <b>DOJA</b> AT BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV NL NO PL PT RO SE SK SM UA
9		<b>LEWIS CAPALDI</b> <sup>UK</sup> <b>FORGET ME</b> AT BA BE CH CZ DE DK EE ES FI GB GR HR HU IE IS IT LT LU LV MD MT NL NO PL RO SE SI SK SM
10		<b>GLASS ANIMALS</b> <sup>UK</sup> <b>HEAT WAVES</b> AT BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD ME MK MT NL NO PL PT RO SE SI SK SM UA

## Emerging artists per year Airplay & Streaming

TOP10

1		<b>ROSA LINN</b> <sup>AM</sup> <b>SNAP</b> AT BA BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD MT NL NO PL PT RO SE SI SK SM
2		<b>SOUTHSTAR</b> <sup>DE</sup> <b>MISS YOU</b> AT BE BG CH CZ DE DK EE FI GB HU IE IS LT LU LV NL NO PL RO SE SK UA
3		<b>LF SYSTEM</b> <sup>UK</sup> <b>AFRAID TO FEEL</b> BA BE BG CH DE DK EE FI GB GR HU IE IS IT LT LU LV MT NL NO PL SE SI SK
4		<b>GLOCKENBACH</b> <sup>DE</sup> <b>DIRTY DANCING</b> AT CH DE FI IS
5		<b>FRED AGAIN</b> <sup>UK</sup> <b>DANIELLE</b> (SMILE ON MY FACE) BE CZ DE DK EE ES FI GB IE IS LV NL NO SE SK
6		<b>FRED AGAIN</b> <sup>UK</sup> <b>TURN ON THE LIGHTS AGAIN</b> BA BE CH DE DK EE ES FI GB GR HU IE IS LT LV NL NO SE
7		<b>ROSA WALTON</b> <sup>UK</sup> <b>I REALLY WANT TO STAY AT YOUR HOUSE TALKING</b> AT CH CZ DE EE GB HU LT LV PL SK UA
8		<b>BENZZ</b> <sup>UK</sup> <b>JE M'APPELLE</b> AT BE BG CH CZ DE DK EE FI FR GB HU IE LU LV NL NO PL SE SK
9		<b>HENRY MOODIE</b> <sup>UK</sup> <b>YOU WERE THERE</b> AT CH DE FI NL NO SE
10		<b>SOUTHSTAR</b> <sup>DE</sup> <b>MISS YOU</b> (SPED UP VERSION) AT BE BG CH CZ DE EE FI GB HU IE LT LV NL PL SK

Data by

Soundcharts

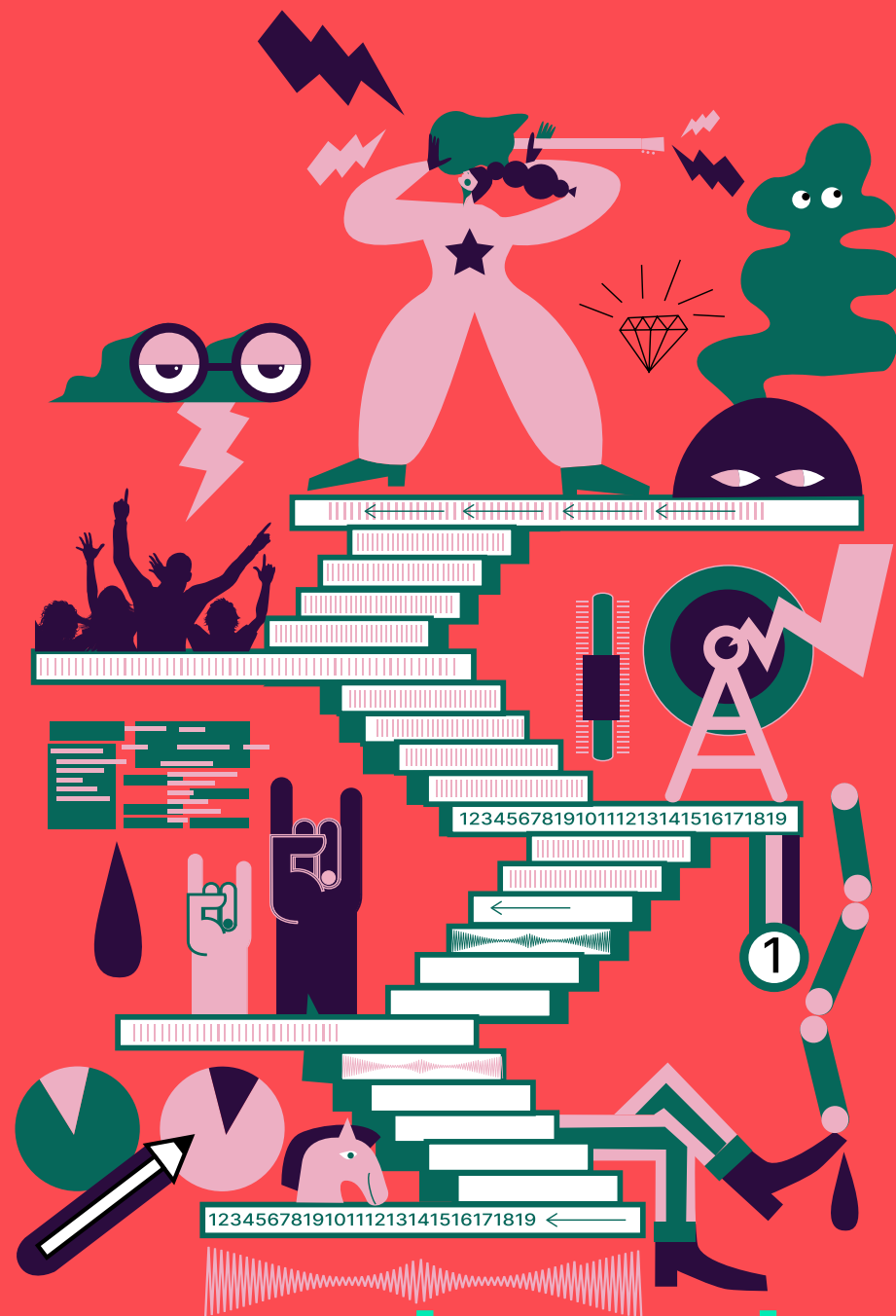
Radar  
European Charts  
& Festivals Insights

## ESNS artists per year Airplay & Streaming

TOP10

1		<b>MEDUZA</b> <sup>IT</sup> <b>BAD MEMORIES</b> AT BA BE BG CH CZ DE DK EE FI GB GR HR HU IE IS IT LT LU LV MT NL NO PL PT RO SE SK SM
2		<b>BECKY HILL</b> <sup>UK</sup> <b>CRAZY WHAT</b> AT BE BG CH CZ DE DK EE ES FI FR GB GR HU IE IS IT LT LU LV MD MT NL NO PL RO SE SK SM
3		<b>INHALER</b> <sup>IE</sup> <b>THESE ARE THE DAYS</b> BE CH DK EE ES FI GB IE IS IT NL PL SE SI SK
4		<b>TOM GREGORY</b> <sup>UK</sup> <b>FOOTPRINTS</b> AT CH DE MT
5		<b>MEDUZA</b> <sup>IT</sup> <b>PARADISE</b> AT BA BE CH CZ DE DK FI GB GR HU IE IT LV MEMT NL PT SK SM
6		<b>MEDUZA</b> <sup>IT</sup> <b>PIECE OF YOUR HEARTLIGHTS AGAIN</b> BE CH DE FI FR GB HU IE IT LV MK NL NO SM
7		<b>GOLDBAND</b> <sup>UK</sup> <b>NOODGEVAL</b> BE NL
8		<b>BECKY HILL</b> <sup>UK</sup> <b>REMEMBER</b> BE DE DK ES FI GB IE LV MD MK MT NL NO SE
9		<b>WET LEG</b> <sup>UK</sup> <b>WET DREAM</b> AT BA BE CH CZ DE DK EE ES FI FR GB IE IS IT LU LV NL PL PT RO SI SK
10		<b>WET LEG</b> <sup>UK</sup> <b>UR MUM</b> AT BA BE CH DE DK EE ES FI FR GB IS LU LV NL PL PT SE SK

# Festival line-up database reveals



## trends and emerging talent

The team behind ESNS is making its global database of festival bookings freely available to the public as part of ESNS Radar – providing a valuable, new artist-centred tool for artist management, agents, promoters, festival organisers and the greater music industry.

By Gordon Masson  
Editor, *IQ Magazine*

## Open access to a comprehensive bookings database

Revealing the results from this year's ESNS Exchange programme – where acts that performed at ESNS are booked by partner festivals around Europe and beyond – the organisers announced they are allowing open access to their comprehensive bookings database. The database tracks every act booked to play across a network of 130 festivals around the world, amounting to more than 11,700 performance slots during the 2022 festival season.

Celebrating its 20th anniversary in 2023, ESNS Exchange allows hundreds of emerging acts to showcase their music and stagecraft to the thousands of music industry delegates who visit ESNS, looking to discover the next generation of talent. While the ESNS Conference schedule during the day allows professionals to discuss issues affecting the business, the ESNS Festival programme at night offers the world's live music decision-makers the chance to see some of the best new artists and bands from the European continent (including non-EU countries such as Iceland, Norway, Switzerland, and the UK).

ESNS Exchange allows hundreds of emerging acts to showcase their music and stagecraft to the thousands of music industry delegates

## ESNS Exchange artists enjoy far-reaching success

Although ESNS 2022 had to be conducted online because of the Covid-19 pandemic, the restrictions do not seem to have harmed the prospects of the artists who showcased their talents on the ESNS platform. ESNS22 acts secured 373 festival slot bookings in 2022, with over 150 acts benefitting as a result of their ESNS Exchange participation.

In terms of the most successful acts from this year's ESNS Exchange, Switzerland's **Priya Raghu** secured 11 bookings; Ukraine's **Alyona Alyona**, UK's **Yard Act** and Ireland's **CMAT** also made double figure with ten bookings apiece; while the fifth most popular act on the programme, punk four-piece **Enola Gay**, who hail from across the border in Northern Ireland, ended 2022 with nine festival slots achieved through the exchange.

ESNS Radar also allows live music professionals to keep track of which acts have performed at ESNS 2022 and in the past, using an advanced tracking system that publishes the data in real-time onto the ESNS Radar website. Next to festival bookings, the database includes a multitude of other interesting information, including debut release dates. That information can assist festival bookers in assessing which acts are crossing borders and how long it has taken them to get noticed – an invaluable tool in the annual task to seed festival line-ups with the best emerging talent.



20%  
TOTAL LINE-UPS  
ON THE SURVEYED  
FESTIVALS

= 2,309

↓

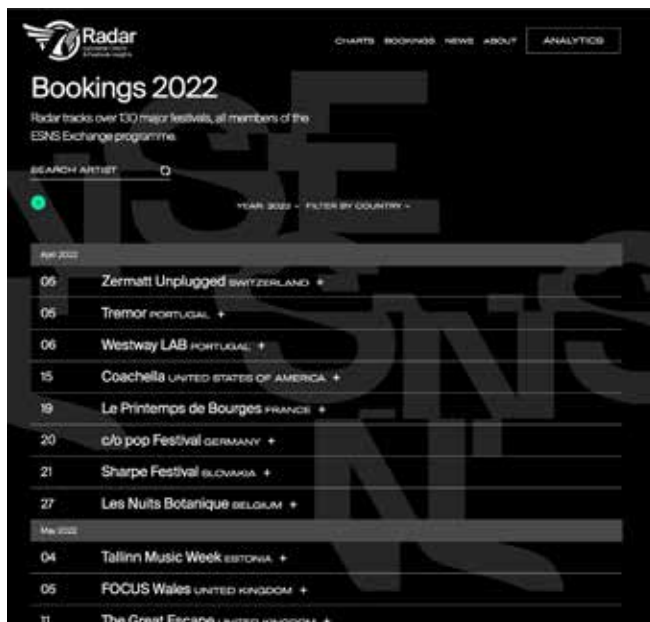
REPRESENTS  
EMERGING ARTIST

## Leading ESNS Exchange acts in 2022

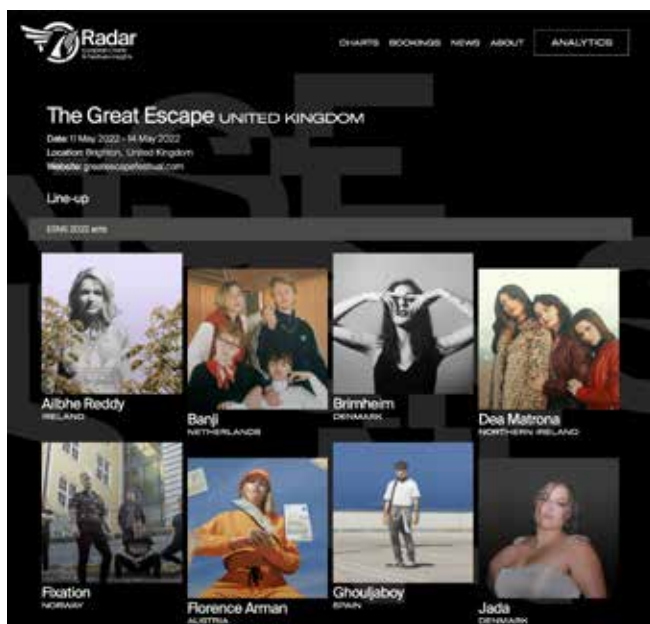
Topping the ESNS Exchange 2022 that enjoyed the most international success, **Priya Ragu** (CH) topped the 2022 imports list, with all of her bookings taking place outside of her home nation. With a focus on Ukrainian artists due to the ongoing war in her home country, **Alyona Alyona**'s ten festival slots took her to **Ypsigrock** (IT), **Superbloom** (DE), **OFF** (PL), **Mad Cool** (ES), **Les Ardentes** (BE), **Pohoda** (SK), **Roskilde** (DK), **Melt** (SI) and **Tallinn Music Week** (EE). These results neatly demonstrate the geographical reach of opportunities that the ESNS Exchange can offer to artists.

Other ESNS Exchange acts who enjoyed significant international festival success this year included **CMAT** with ten bookings, three of which were in the UK; and the UK's **Holly Humberstone** whose online performance in 2021 helped her secure eight festival slots across the Czech Republic, Germany (x2), Finland, France, Hungary, Sweden, and the United States, where she landed a coveted spot at Coachella festival.

By means of an automatic system developed by ESNS the extensive database also tracks non-ESNS Exchange acts of the line-ups of numerous 130 festivals around the world. ESNS Radar allows users to discover that Irish act (and ESNS Alumni) Inhaler were booked by 13 festivals; Australia's **Amy and the Sniffers** proved popular around Europe with eight festival slots; Pakistan's **Arooj Aftab** performed at ten festivals around the world; and American A-list act **Megan Thee Stallion** also enjoyed ten festival headline slots.

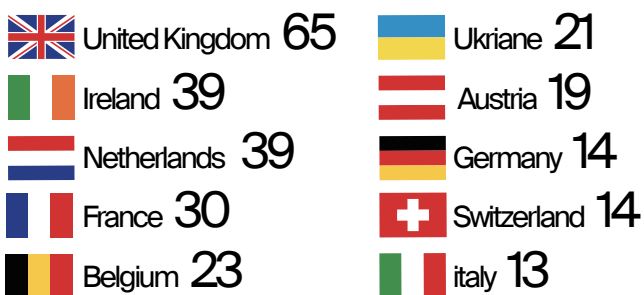


screenshot  
Radar Bookings Overview



screenshot  
Radar Bookings Festival page

Top 10 ESNS Exchange countries:  
Country/number of ESNS Exchange bookings 2022



## Festivals boasting the most new acts

That wealth of rich data can be used by agents to inform them of the festivals that are most open to giving emerging talent a chance, as well as which events do not tend to book new acts. Indeed, the database can also be accessed by agents looking to add new artists to their rosters, as many acts that perform at ESNS each year are in search of representation. ESNS Radar can also point to territories and events that have supported the ESNS Exchange acts early on in their careers and may be ripe for headline tours by those acts.

The data underlines the sustainable success of the ESNS Exchange concept. From the total of 130 event line-ups in 2022 included in the research, which translates to 11,763 festival slots, 14.7% of all festival bookings in 2022 (1,732 acts) were previously involved in ESNS Exchange.

New acts are fundamental to festival bookers internationally. Digging a little deeper into the composition of the full scope of 2022 festival slots, 813 bookings (7%) of acts are fresh on the scene, having first released their music after 2020. Nearly 20% of the total line-ups on the surveyed festivals – 2,309 bookings – represents acts whose first release dates from the beginning of 2017. Festivals who booked the most new acts include; **The Great Escape**, **Reeperbahn Festival**, **Primavera Sound**, **Glastonbury Festival** and **Montreux Jazz Festival**.

ESNS booker and head of programme, Robert Meijerink, reveals that compiling the ESNS Radar database was always a dream within the organisation, but it took the pandemic closing down live music events to allow ESNS staff the time to create the system.

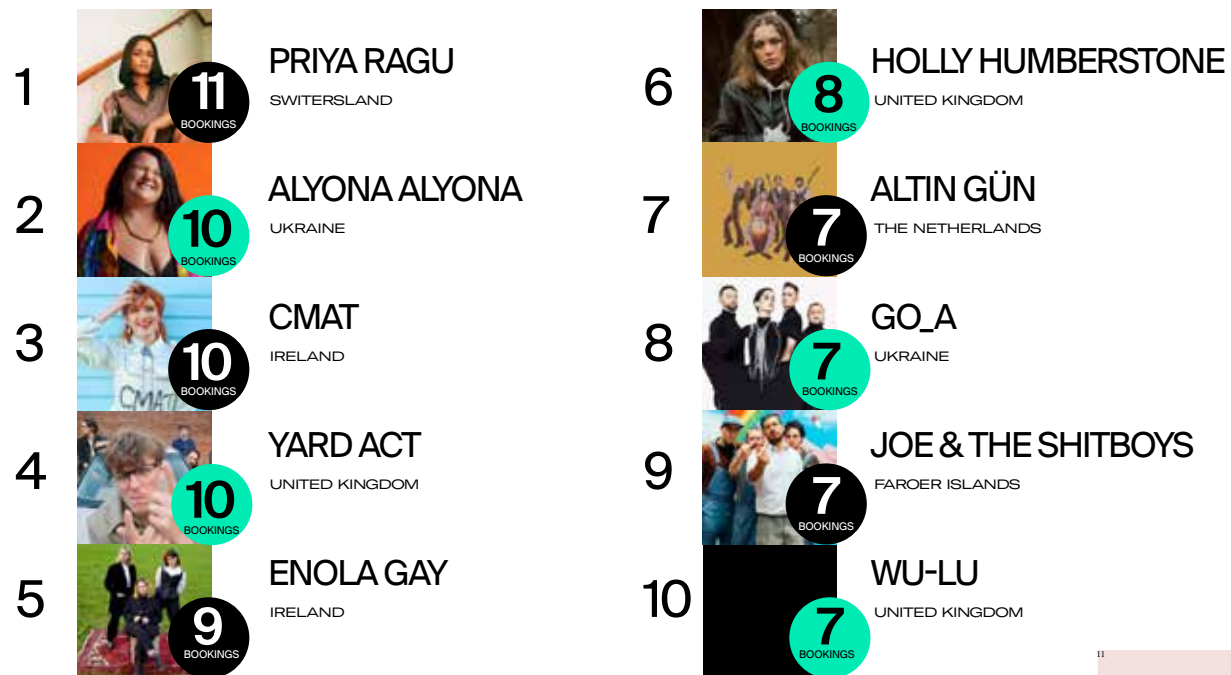
Robert Meijerink, booker ESNS



"If, as a booker, you are looking at an unknown Norwegian band whose music you like, the Radar allows you to see in one click what their stats are. This is valuable as it gives you the opportunity to find out even more. You can see the history of bookings, you potentially can discover how many exchange festivals have been played, and if the numbers are going up or down. It's a fantastic tool for professionals. ESNS is eager to expand their database to include more festivals in the coming year and conduct yearly research – aspiring to provide annual insights into trends and top ESNS Exchange artists. We look forward to it!"

# ESNS Exchange booking results 2022

## ESNS Exchange Artist chart: Top 30



### Artists (country)

11 MEZERG (FR)	6
12 MIMI WEBB (UK)	6
13 YĪN YĪN (NL)	6
14 FRIEDBERG (AT)	5
15 MESKEREM MEES (BE)	5
16 MYD (FR)	5
17 ALINA PASH (UA)	4
18 ASCENDANT VIERGE (BE)	4
19 DAÐI FREYR (IS)	4
20 LNDFK (IT)	4

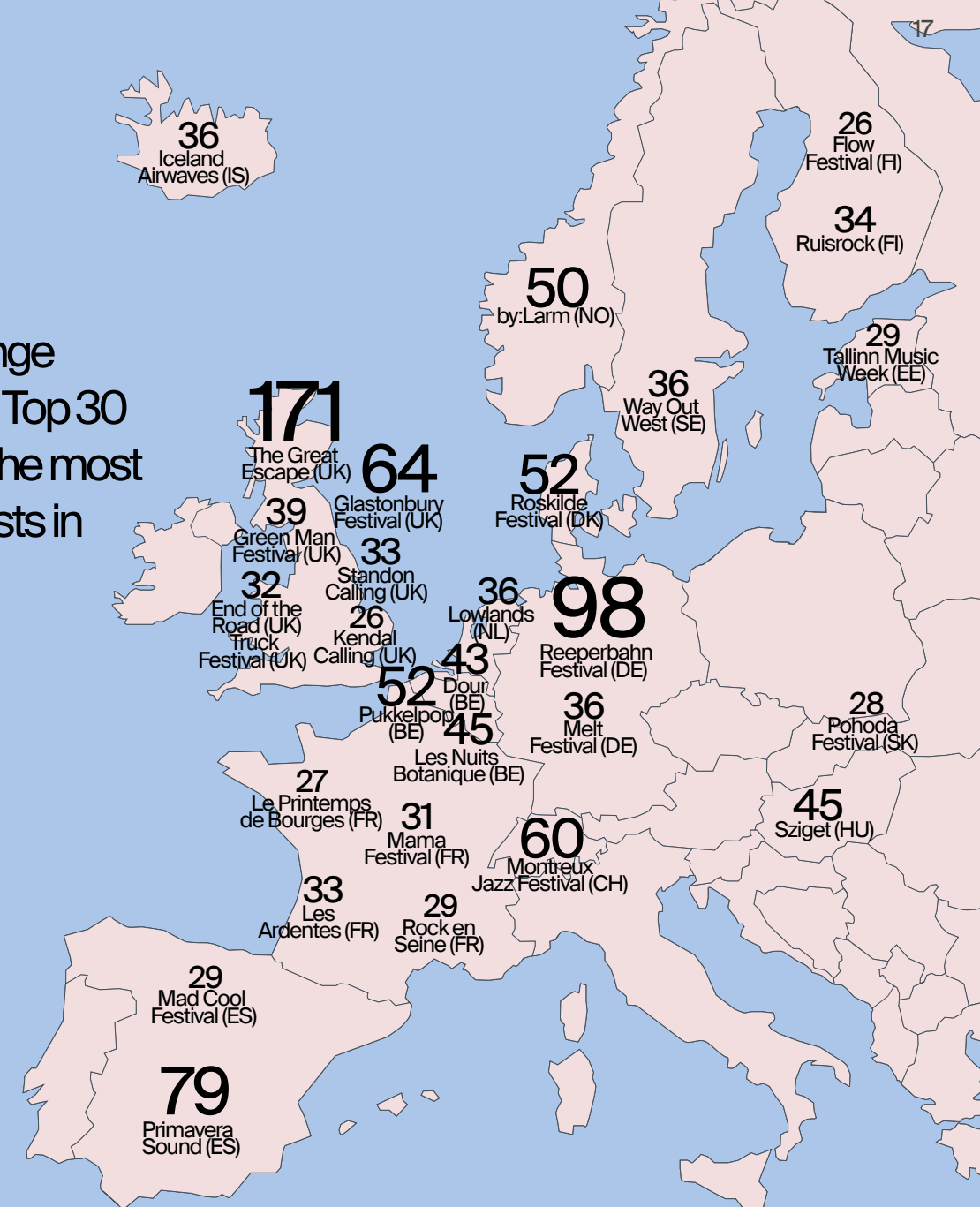
### Bookings

### Artists (country)

21 SELF ESTEEM (UK)	4
22 THE LATHUMS (UK)	4
23 52 HERTZ WHALE (SK)	3
24 AMELIE SIBA (CZ)	3
25 BANJI (NL)	3
26 COUCOU CHLOE (FR)	3
27 DEA MATRONA (IE)	3
28 FLORENCE ARMAN (AT)	3
29 K.ZIA (DE)	3
30 KIDS RETURN (FR)	3

### Bookings

## ESNS Exchange Festival chart: Top 30 festivals with the most emerging artists in line-up



### Festival Name (country)

The Great Escape (UK)	171
Reeperbahn Festival (DE)	98
Primavera Sound (ES)	79
Glastonbury Festival (UK)	64
Montreux Jazz Festival (CH)	60
Pukkelpop (BE)	52
Roskilde Festival (DK)	52
by:Larm (NO)	50
Sziget (HU)	45
Les Nuits Botanique (BE)	45
Dour (BE)	43
Green Man Festival (UK)	39
Coachella (US)	38
Melt Festival (DE)	36
Lowlands (NL)	36

### Nr of emerging acts in 2022

### Festival Name (country)

Way Out West (SE)	36
Iceland Airwaves (IS)	36
Ruisrock (FI)	34
Les Ardenes (FR)	33
Standon Calling (UK)	33
End of the Road (UK)	32
Truck Festival (UK)	32
Mama Festival (FR)	31
Rock en Seine (FR)	29
Mad Cool Festival (ES)	29
Tallinn Music Week (EE)	29
Pohoda Festival (SK)	28
Le Printemps de Bourges (FR)	27
Flow Festival (FI)	26
Kendal Calling (UK)	26

\* Emerging artist considered in this chart are acts who released their debut later than 1/1/2017 // Please note that only artist with available debut data were included in this chart

\*\* Full list of ESNS Exchange Festivals can be found on [esns-exchange.eu](https://esns-exchange.eu)



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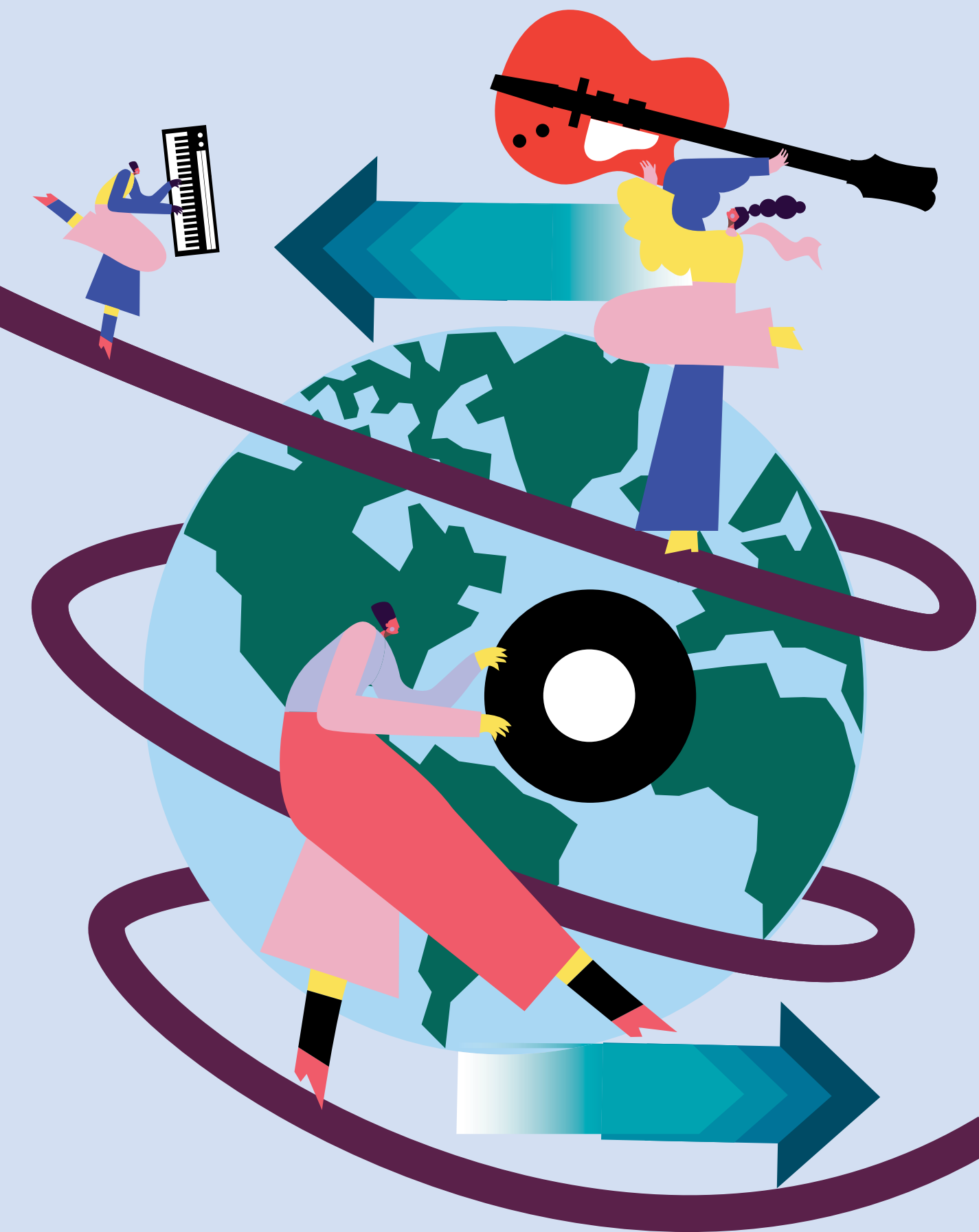
2 Use VIP Analytics to measure the Fan interest for the Artist:

3 Check our Tourdates section to see where the Artist is booked near you.

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“Talent, creativity and initiative is intrinsic and potentially everywhere. An artist, creator or a music entrepreneur should have the means and ecosystemic support to realise their full international potential regardless in which European country they are born and set out to achieve their vision.”

# Developing music export in Europe

By Virgo Sillamaa  
Research Coordinator, EMEE

It's very likely to be the dream of every artist and creator to make the world their stage and to find their audiences among communities from across the globe. The phrase '**music export**' captures what artists, creators and the surrounding teams of professionals and music companies set out to achieve: sustainable success on international music markets. Reaching larger and more diverse audiences offers both cultural and economic gains – for the artists, creators and entrepreneurs, as well as for European music sectors at large. The importance of music export has been consistently recognised also in the **Music Moves Europe** initiative, spearheaded by the **European Commission**.

The alleged democratising effect of the internet aside, accessing international audiences is not a small feat. The music export capacity of artists, creators and

music entrepreneurs is made up of various factors, some reflecting the specific national constraints, such as the size of the local market. Other restricting factors can be improved, such as the differing levels of music ecosystem development or policy support across European countries, or access to international professional networks and knowledge.

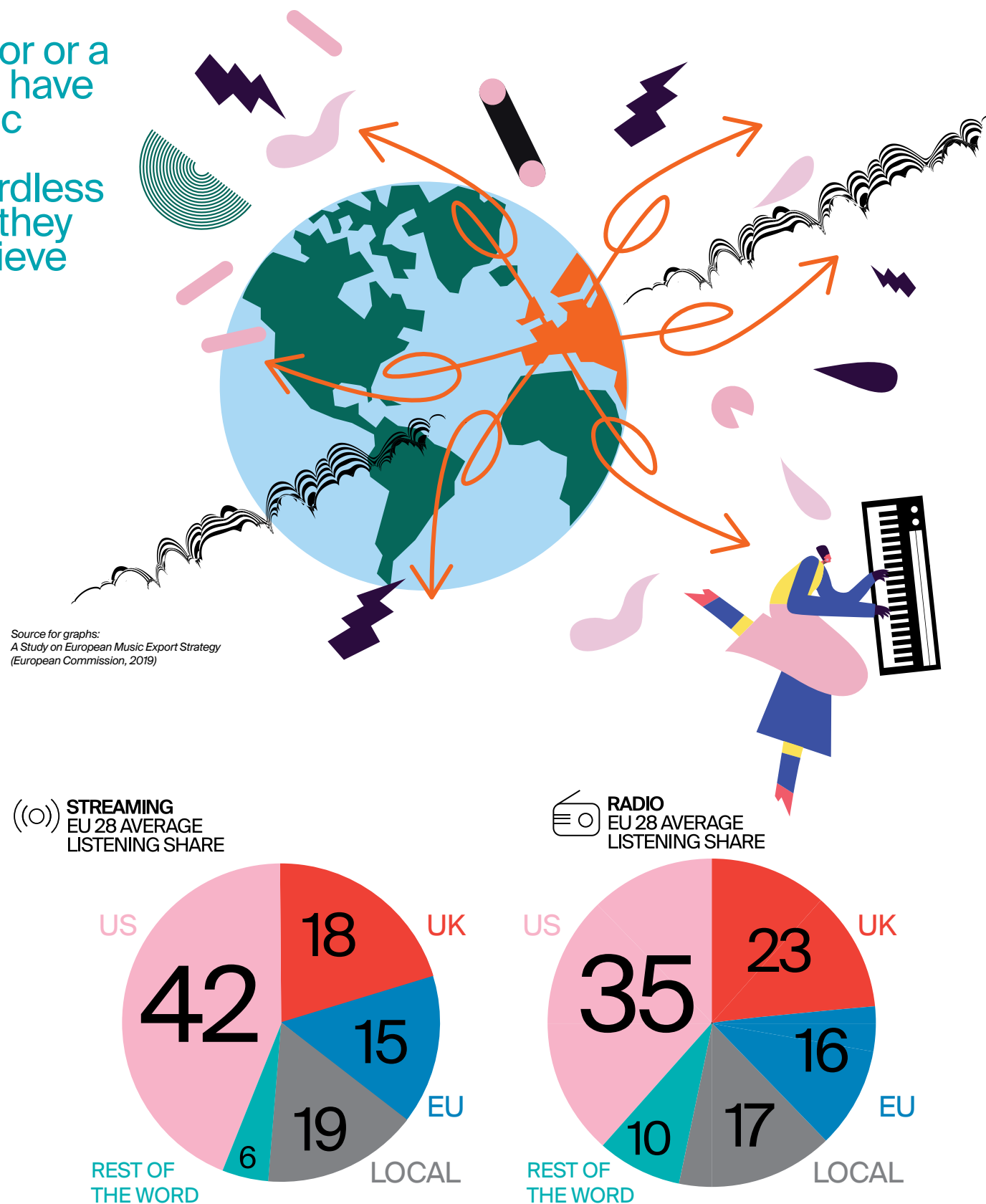
To support the growth and development of music export capacity in the music sector, music export organisations have been set up in most European countries – with new ones being formed as this is written. The way each of these organisations work is very different, reflecting the specific needs of their national or regional music sectors, but the overall vision and mission is the same:



Talent, creativity and initiative is intrinsic and potentially everywhere. An artist, creator or a music entrepreneur should have the means and ecosystemic support to realise their full international potential regardless in which European country they are born and set out to achieve their vision.

This is far from true in Europe, however, as several findings have shown over the past years. There are significant disparities in how well the music sector ecosystems have evolved and to what degree crucial knowledge, education, professional networks and financial support is available to young talent and professionals. And Europe as a region is competing on a global music market that is strongly led by the US and UK repertoire.

While small markets will always be somewhat limiting, music sector ecosystems can be developed and better policies can be designed. The key is **multilevel European cooperation**. To achieve this, the **European Music Exporters Exchange (EMEE)** was founded in 2018 by a network of 29 members from 25 European countries. Through several projects over the past four years, **EMEE** has been developing a **European Music Export Strategy**: a framework for coordinated strategic action for multiple stakeholders, from the music sector organisations to member states and European institutions. The strategy puts forward a six-step development path to organise the various policies, programmes and actions and suggests new blueprints for **European level** cooperation. Several pilots have been carried out in the **EMX project** (2021–2022), including a **European capacity** building programme for music professionals and export organisations, as well as two trade missions; a digital one connecting European hip hop and rap professionals with their peers in Canada, and another inviting a group of European electronic music professionals to visit Mexico. The organisation's immediate future plans include conducting more market studies, continuing the development of a **European music export** resource centre and increasing **European music sector** presence in international markets.



The organisation's immediate future plans include conducting more market studies, continuing the development of a European music export resource centre and increasing European music sector presence in international markets.

The **music export** organisations are not doing it alone. The many showcase and conference platforms across Europe and internationally are of crucial importance – providing emerging artists with stages and an audience of music industry professionals. **ESNS** has partnered up with music export organisations for over 25 years, making sure that the artists programmed are set up to take the maximum benefit from their short presence on the showcase stage. The **ESNS talent development system** – that cleverly includes festivals, media partners, export organisations and the professional community – aims for both immediate impact for the artists on stage, but also long-term strategic development across **European music sectors**.

The one conspicuously missing piece of the puzzle for the music sector has for a long time been consistent and rich data about the sector, markets and music usage. A lot of data exists in various institutional and corporate vaults, and bringing these resources together is faced with many hurdles. This is what makes **ESNS** launching its **Radar** and **Analytics** initiatives a significant step forward. This could very well be the nucleus we can build a **European music data** initiative around. More insights into the actual impact of artists performing at ESNS, being listened to on streaming platforms, followed on social media<sup>2</sup> and booked for festivals will give valuable tools for the artists and their teams, but also to music export organisations to develop their programmes and seek to shape effective policies.

<sup>1</sup> See for example the Study on European Music Export (EC, 2019) and also this was confirmed in the internal research of the EMX project (final report yet to be published).

<sup>2</sup> True, music export organisations had been networking informally for years.

By Teresa Moore  
Director, A Greener Festival

# Live music's green journey looking forward to 2023

In 2022, live music was at last able to emerge from Covid-19 and get back to business. In doing so, there was a chance to put many of the changes discussed during the Covid-19 years into practice and revive some of the stalled initiatives started prior to the lockdowns, such as the Circular Festival led by the Netherlands's Green Deal initiative. Having had time to reflect and review the industry's response to tackling climate change, it feels as though there is a renewed momentum in the industry's efforts to reduce its environmental impacts. At the same time a number of themes have emerged which are likely to grow in 2023.

## Net Zero Touring

When Coldplay announced that they were concerned about the environmental impact of touring in 2019, and that they would not tour their new album until they had found a way to make their tour "carbon neutral", it came as a surprise to some in the industry. The term carbon neutral hit the mainstream but not everyone was sure exactly what they meant. During the Covid-19 years, they and their team worked out an approach to reduce their tour emissions, so when the 2022 Music of the Spheres world tour was announced, so too were the measures they would take to cut emissions. Interestingly though the language had changed. In a statement they said,

**"We pledge to drawdown any unavoidable emissions according to the Oxford Principles for Net-Zero Aligned Carbon Offsetting."**

<https://sustainability.coldplay.com>

The language had shifted from carbon neutral to net zero. This is an important shift – for whilst both approaches include carbon offsetting to reduce emissions, net zero implies that offsetting would be used as a last resort when everything else had been tried, rather than just factored into a package of measures. As a result, the net zero approach will require more measurement, more data and evaluation, and more attention to detail on the ground – something which until recently has not been part of tour planning, but is likely to gain major traction over the next couple of years. We've already seen an increase in focused attention on touring. Next to the Coldplay tour, the 2021 UK leg of the Bring Me the Horizon tour worked together with A Greener Festival (AGF), reducing the tour's impact by 38%. Several other major artists are working to reduce their touring impacts into 2023. Net zero will be a major focus for touring across the industry.

## Offsetting and insetting

As more of us are being encouraged to tick the offsetting box as we buy our tickets for travel and live events, the concept of offsetting has shifted from the preserve of corporate social responsibility (CSR) in the 1990s to something that is now much more commonplace for all. However, at the same time, a critical review of the principles of offsetting is emerging. This is not the same as the arguments about offsetting 1.0 in the 1990s, where concern was more about the many bogus schemes operating. Today's offsetting schemes often provide audited evidence that they are genuine. No, this is about fundamentals: Everything from questioning the morality of buying your way out of the emissions problem, to offsetting being a form of greenwashing, to the validity of for example tree planting in far-off lands as a form of philanthropic capitalism. Instead, we need to think about solutions that provide much more immediate results, and which can be achieved within organisations locally – insetting.

An example of insetting in practice is the unique solar carport opened at Mojo Concert's Lowlands Festival 2022 which has 90,000 solar panels and can supply green energy to 10,000 homes. Of course, not all events can introduce developments on this scale. There are now a number of organisations operating to help the industry identify projects of different scales to offset and mitigate their CO2 emissions.

## Joined-up thinking

From our work at A Greener Festival, it has always been clear that those events and festivals that score most highly in our certification process not only have many innovative measures and practices to tackle their event's emissions, but that those measures are embedded into everything the event does. What stands out is that the most successful take a joined-up approach to making their events as green as possible. Today's festival needs to be viewed as an ecosystem of sustainable practices, where every aspect of the event supports its sustainability goals.

The launch of the LIVE Green's declaration for the UK live music industry in 2021 took this joined-up approach one stage further, by bringing together what had been in-effect siloed parts of the live industry to take up the challenge together. In a joint declaration, the industry agreed its goals to reduce emissions and tackle climate change going forward. This joined-up approach is likely to spread in other countries and organisations within the EU's live music industry in 2023; as we realise that live music's many components are all interrelated. From the festivals to the venues, arena, stadia touring and the many suppliers of goods and services to the industry – all have a connected part to playing in reducing the environmental impact of live music.



The Green Deal Circular Festivals (GDCF), established in 2019, is a collaboration between European festival organisations and the Dutch government. GDCF stimulates sustainable innovation and collaboration in the European festival world. Under this Green Deal, the participating Dutch and European organisations are working together towards the goal of becoming circular and climate neutral by 2025. In the past year, the sustainability pact doubled from 20 to 43 festivals from 14 countries; illustrating that the need for joint thinking is substantial.

## Self-regulation or legislation

We know that time is pressing to clean up our act and reduce emissions, and there is debate about the most effective way to bring this about in the shortest time. At the heart of that debate is whether this change should be driven by the industry itself or by legislation. On the one hand, the LIVE Green's declaration has taken the bull by the horns and effectively declared that the change will happen from within the industry. Unsurprisingly, there is a belief that the industry's track record in pushing for change is evidence that it can make that change without the need for legislation – having previously staged the 1970 Amchitka concert which launched Greenpeace, and the more recent 2019 Music Declares Emergency. Symptomatic of this debate is the recent drive to introduce a self-regulatory Green Code of Practice from some in the UK live industry. By contrast there is a view amongst some in the industry in, for example, the Netherlands, that legislation will be necessary to make the scale of change needed. How this will play out in the coming years and within the global context of climate change will be important to the future of greening the industry.

In summary, 2022 saw a greater response by the industry to reducing their environmental impact. We have a better understanding of the issues involved in greening our live industry, in part because of the time to pause and reflect during Covid-19. There is much to be optimistic about. There is no doubt, however, that time is not on our side. We need to do better, faster, to reduce the impact of our industry on the climate.



## CASE-STUDY



### PERSONAL TRAINER



27% ↑  
SPOTIFY



14% ↑  
INSTAGRAM



9% ↑  
FACEBOOK

2,370 RADIO PLAYS DURING  
THE PAST YEAR IN NL

FOLLOWERS

300



4,200

# Personal Trainer

By Erwin Blom  
Music professional

For anyone addicted to data like I am, ESNS Analytics is a gold mine. On a great-looking dashboard, the tool allows us to see how an artist is performing on Spotify, Deezer, SoundCloud, YouTube, and social media.

The tool also offers an Airplay Map, which provides an overview of active markets across the globe with insight into which international radio stations are picking up on an artist. I love it. The right data can give an artist, management, booking agency, and label invaluable insight into how they are performing, whether they are reaching their goals and which international market opportunities lie ahead. In short, ESNS Analytics gives a really useful overview.

Zooming into a few examples of Dutch artists who played at the last edition, ESNS Analytics offers visual insight into a surge in success following their showcase at ESNS. If we have a look at the statistics, we see Dutch artist Meau exploding on Spotify after ESNS of this year. Pop star Antoon and the newcomer Bob Uit Zuid can be seen to spike numbers too. Looking at those stats, it's evident that ESNS made a difference for these artists. It's nice for the organisers to see that they can make a difference, and for showcasing

artists to see that their investment into a showcase festival pays off. But their success is of course thanks to a combination of factors. It's about releases, media, gigs, etc. In order to spike this success, the artist teams will always need to plan ahead and organise relevant events in connection with the showcase to have the best effect. So all factors reinforce each other.

For artists and their entourage, the ESNS Analytics can play an important role all year round. Take Personal Trainer for example – who played ESNS21 online and have just been confirmed for ESNS23. It's mid-November at the time of writing this case study. On 4 November 2022, Personal Trainer released their debut album Big Love Blanket. Every review they've received has been raving, they have played on Dutch radio and TV, and were on the line-up of the prestigious Le Guess Who? Festival in Utrecht, the Netherlands. In order to demonstrate an example of reinforcing factors, let's turn to their ESNS Analytics.





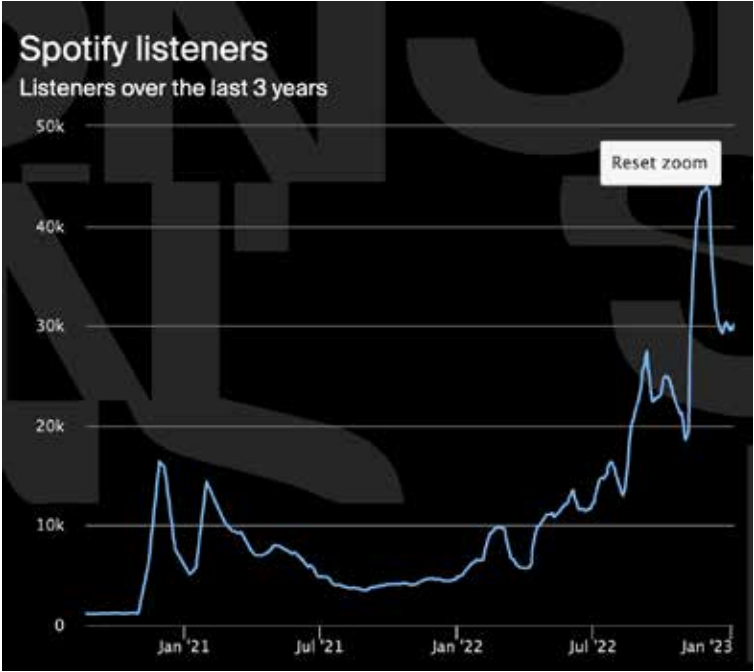
Screenshot:  
Personal Trainer profile



Looking at Personal Trainer’s social media and streaming sections of ESNS Analytics, we can see that the only way is up right now for the Amsterdam-based rock outfit: with rapidly increasing followers on Spotify (+27%), Instagram (+14%) and Facebook (+9%). The stats also tell us that the band can definitely improve their impact on YouTube: 300 YouTube followers is a low figure compared to 4,200 Spotify followers. Considering there are two leading search engines today, namely YouTube and Google, a healthy presence on YouTube can definitely work in their favour.

Taking a closer look at the Airplay Map on ESNS Analytics, the tool visualises where an artist is doing better or worse in terms of airplay and lists which stations are playing which artists. It comes as no surprise that our home country of the Netherlands did very well for Personal Trainer with 2,370 radio plays during the past year, but it is also interesting to see how other countries fared. The band recently visited the UK and the 251 radio plays in the last year suggest that they

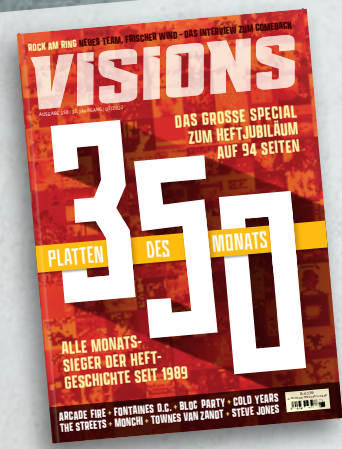
Screenshot:  
Personal Trainer Spotify listeners



should indeed double down on that market – there are big opportunities for them there. If they find themselves asking: do we choose to prioritise Germany and France? At the moment the biggest opportunities seem to clearly lie in the latter: with 29 radio plays in France and 2 in Germany.

Not just for Personal Trainer, but for every other artist, ESNS Analytics is a useful tool that provides insights on past data and current standings of an artist, as well as reveals opportunities for the future. Considering that the past two editions of ESNS were digital – meaning the results were and continue to be limited due to the ongoing pandemic – we are excited to see what the future holds. How will a live edition of ESNS affect the artist results? Will we see more bookings in the summer of 2023? Will the physical showcases in Groningen bring an even larger boost to artist careers? All of this we will be able to monitor through ESNS Analytics in the upcoming months.

# MUSIC. NOTHING ELSE MATTERS.



## VISIONS

The new **VISIONS** magazine is aiming for more. More in-depth stories and interviews, a broader variety of special topics and a well informed look behind the scenes of the alternative rock world. We took our 30th birthday in 2019 as the occasion for a major relaunch of our magazine without for-getting our roots: **VISIONS** meets its readers at eye level, always opinionated combined with unbroken curiosity and the heartfelt love of music.

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## MINT

Since its founding days in 2015, **MINT** has rapidly developed into a mouthpiece for a tight-knit vinyl community. Records have celebrated an enormous revival in recent years - our magazine for what we call „vinyl culture“ is aimed right at the heart of this steadily growing community. We deliver specialist knowledge, in-depth reports and a large number of record reviews and we are proud to say: **MINT** doesn't simply have readers. It has supporters.

[www.mintmag.de](http://www.mintmag.de)



## FESTIVALPLANER

**FESTIVALPLANER** is the leading source for all facts about what's going during the festival season and Germany's market leader when it comes to music-/lifestyle-magazines for a young adult audience. Alongside the coverage of all relevant festival news, the magazine guarantees a wide reach communication for our brand customers into a very attractive target group.

[www.festivalplaner.de](http://www.festivalplaner.de)

CONTACT US: [MARKETING@VISIONS.DE](mailto:MARKETING@VISIONS.DE)





ESNS has a proven track record for supporting emerging artists and the 2022 edition was particularly special for Wet Leg, even though the event had to take place digitally due to post-pandemic restrictions.

### Wet Leg



4% ↑  
SPOTIFY



8% ↑  
INSTAGRAM

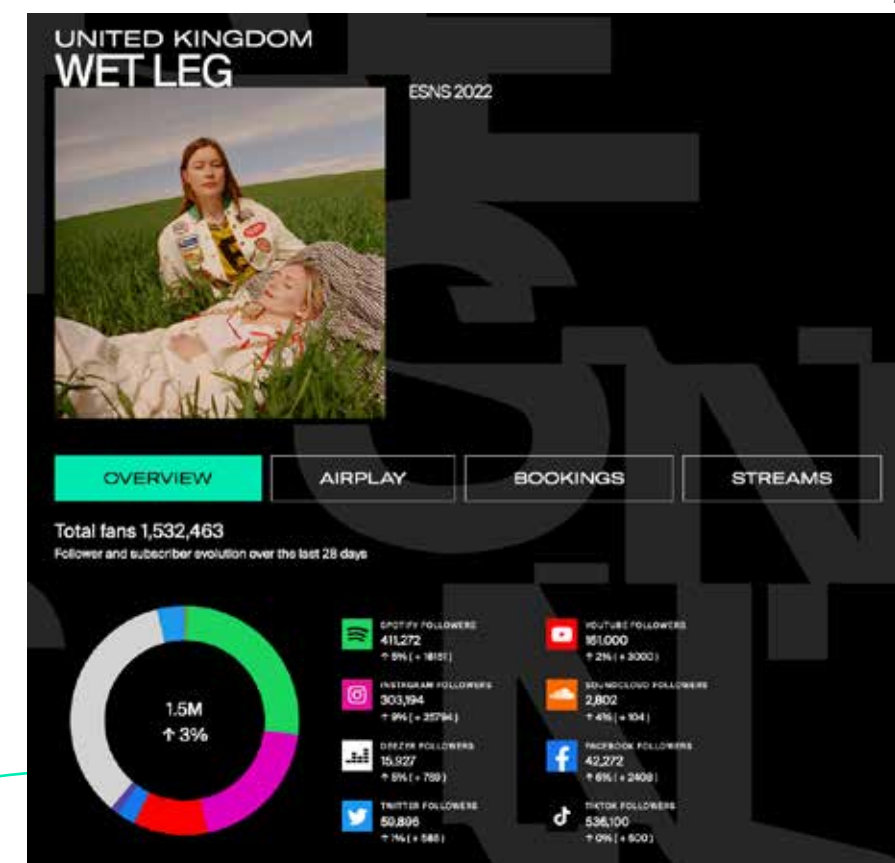


10% ↑  
FACEBOOK



6% ↑  
TIK TOK

By Ben Homewood  
(Features Editor, *Music Week*)



The Domino-signed duo, made up of Rhian Teasdale and Hester Chambers, played one of their first shows of 2022 at ESNS, going on to top the UK album charts with their debut full-length and play packed shows around the world.

Nine of those were festival bookings with partners of ESNS Exchange, a Europe-wide network of festivals and media partners designed to boost the international careers of acts from across the continent. In the spring and summer of 2022, Wet Leg played sets for nine ESNS Exchange events, beginning with Les Nuits Botanique in Belgium, Primavera Sound in Spain and France's Eurockéennes de Belfort. The band also starred at Winterthurer Musikfestwochen, Haldern Pop Festival in Germany, Belgium's Pukkelpop and Lowlands in the Netherlands, as well as two festivals in the UK: Glastonbury in England and TRNSMT in Scotland.

Formerly known as the European Talent Exchange Program (ETEP), ESNS Exchange invites festivals, radio stations and media outlets to support acts that play ESNS each year. From its inception in 2003 up until 2020, 4,561 shows by 1,711 European artists from 38 countries were presented at 130 ESNS Exchange festivals. Wet Leg rank among the most popular acts from 2022's livestreamed edition of ESNS, alongside the likes of Yard Act, Holly Humberstone and Priya Raghu. Regardless of the nine bookings listed for Wet Leg, their ESNS Exchange end result is seven festivals – because they do not include home country bookings.

Also in 2022, ESNS has launched ESNS Analytics, a hub for data associated with each act to grace its stage. A live tracker of activity on social media platforms and DSPs – which refreshes every day – reveals that Wet Leg's engagement has risen by 6% during the past 28 day period, with some 1.4 million new fans coming on board. On Spotify, where their monthly listenership currently exceeds two million users, their follower count went up by 4%, while Facebook, Instagram and TikTok saw increases of 10%, 8% and 6% respectively. ESNS Analytics also lists engagement on Deezer, Twitter, YouTube and SoundCloud, with graphs supporting the data, too.

The Airplay tab on ESNS Analytics details every play on ESNS Exchange radio stations over the past 28 days. For Wet Leg, single 'Wet Dream' comes out on top, with 320 spins on KYRK-FM (The Shark 106.5 FM) and 246 plays on WJMJ-F2. Both stations are in the US. The track enjoyed heavy rotation across further American and Canadian stations, plus a handful in the UK (Absolute Radio, Radio X) and Germany (Bonn FM). The data shows heavy international plays across Wet Leg's catalogue, with stations from Australia to Mexico and beyond supporting their music.

ESNS Analytics also tracks streams, with 'Wet Dream' firmly established as the most popular Wet Leg track at DSPs over the past 28 days (data from 14 November 2022). With 3,278,090 streams for the period, its total currently stands at 41,370,260. 'Chaise Longue', their




2020 breakthrough anthem, has 1,655,617 plays over the past 28 days and 34,860,190 in total. ‘Too Late Now’ is the third biggest Wet Leg song in terms of streaming data, with 11,196,486 total plays and 491,020 in the past month. ‘Angelica’ (9,216,849), ‘Ur Mum’ (8,052,211), ‘Being In Love’ (7,450,868) also top 5 million total plays. Wet Leg’s ESNS story shows that the support of the ESNS Exchange programme has significantly boosted the Isle Of Wight duo’s career, which continues to soar to new heights. The band’s agent, Adele Slater at Wasserman, said that since playing Eurosonic on 19 January 2022 has been extremely busy for Wet Leg across the globe.

“This will continue into next year where they will be supporting Harry Styles in Australia, New Zealand and across Europe and the UK, they will be doing a few select festivals in the US and Europe as well as their first headline shows in Japan,” Slater said. “Then they’ll have some time off after the summer to finish the new album, before starting over again in 2024.”


Slater also tipped Wet Leg to become festival headliners in their own right.

“They have the songs, the ability, and personalities to be here for the long term,” she said. “It’s about time we had some fresh and exciting talent up there on the top line billings.”


- 1




Wet dreams  
41,370,260
- 2



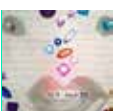
Chaise Longue  
34,860,190
- 3




Too Late Now  
41,370,260
- 4



Angelica  
9,216,849
- 5

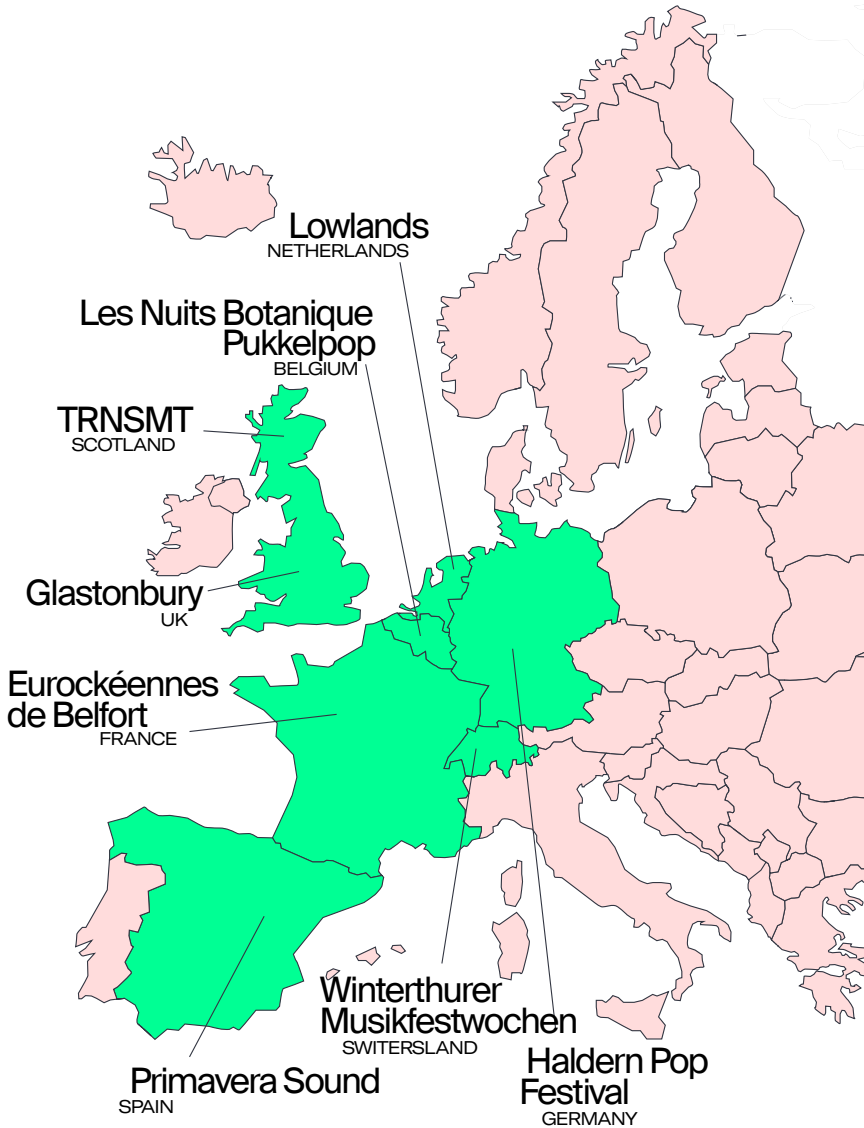


Ur Mum  
8,052,211
- 6



Being in love  
7,450,868

data from 14 November 2022

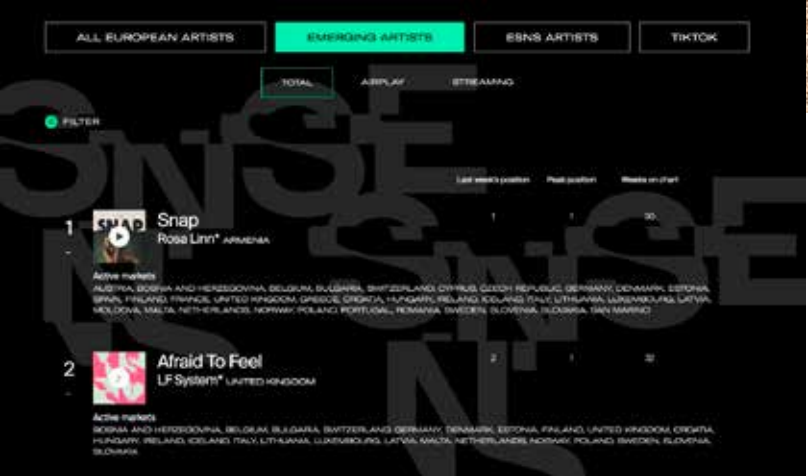


# The ESNS data platform



## Explore Border Breaking European Artist

Explore our airplay and streaming charts, bookings charts and latest news to discover which artists are making an impact outside their home country.



Get the latest festival bookings insights & find European acts trending on airplay, streaming and TikTok!



Dive into in-depth analytics of ESNS line-up with ESNS Analytics. Overview includes social media following figures, live airplay tracking, Spotify streams and more!

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### Colophon

THE STATE OF EUROPEAN MUSIC:

REPORT 2022 IS PRODUCED BY ESNS

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### About ESNS Radar

ESNS Radar is the charts tool developed by ESNS in partnership with Creative Europe. ESNS Radar is powered by SoundCharts. All data presented on this website is tracked by SoundCharts, with the exception of the festival bookings, which are done by ESNS.

