

The State of European

Report 2023

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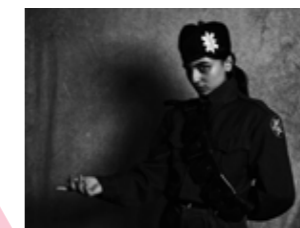
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introduction

Marking two years since the launch of ESNS Radar, we are proud to present the second edition of *The state of European music: Report 2023*. The articles use the platform's unique data to track the rise of emerging European acts, analyse successful artist strategies, and generally reflect on the impactful insights the tools can reveal. Powered by the open access ESNS Radar and data-driven ESNS Analytics tools, this publication provides unparalleled insight into the state of European music and presents examples of how to delve into both 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 trends that shaped the ESNS Radar charts in 2023. Looking back at a year's festival season, *IQ Magazine* Editor Gordon Masson offers observations on Covid recovery, emerging artists on the rise and the impact of Brexit.

Following the route of international success, EMEE Research Coordinator Virgo Sillamma examines who funds European music export programmes. Celebrating 20 years of ESNS Exchange, Managing Editor of *DIY Magazine* Sarah Jamieson looks back to demonstrate how integral the ESNS Exchange has become to the European music industry. Turning to the subject of inclusivity, *shesaid.so's* Connie Chow and Melissa d'Engelbronner take measure of the gender balance in ESNS's festival bookings over the past two decades.

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 Week* Features Editor Ben Homewood and Music Business students from NHL Stenden analyse the surge in success for ESNS23 artists **Heartworms** and **The Haunted Youth** in the past year. Turning to social media, *Oor's* Lola Deschuytter speaks to Sarah Julia on rolling the dice on the TikTok algorithm.

Looking ahead, the future continues to look bright for the data platform – with new features launched and aspirations on the horizon. Discover the latest functions and potential of the ESNS app below and visit radar.esns.nl to venture forward.

ESNS Radar and ESNS Analytics

What's new and what's next?

Powered by data provided by SoundCharts, ESNS Analytics revamped the way the geographical data is portrayed. "ESNS Analytics now shows each artist's geo data using a map – clearly depicting the locations of the artist's social media followers, plays on the radio, streams on Spotify, and number of bookings."

When revisiting the impactful data the platform already provides, Lieve Simons believes the charts are largely overlooked in regards to their potential. "Where there are multiple global charts, we host the exclusive European charts available. Take the Emerging European charts, which can reveal how artists are performing specifically in Europe. This can be particularly influential for emerging artists, who don't usually end up on the bigger charts; to understand where they are on the rise, where there's potential. It's also an exciting tool for exploring new music – why not dive in and find out who is coming up in Austria?"

Turning to ESNS Analytics, "it's really interesting to see the growth some artists have. Some artists start at naught in airplays and bookings and show a sudden and very clean curve. Others have been at it for a long time, on a steady trajectory, and then we see a sudden spike! There's lots to be unearthed."

Kicking off with what's new with ESNS Radar, the ESNS bookings page has been completely redesigned. Lieve Simons (marketeer of ESNS Radar) explains:

"we revisited the UX design to really recenter the artists and allow the data to better tell the story of their booking trajectories."

Extending the scope of the bookings data, and in celebration of 20 years of ESNS Exchange, visitors can now gain complete insight into the booking history of European artists, dating back to 2003.

by Roxy Merrell
Music journalist and writer

Want to see the status of ESNS24 artists live? The ESNS Radar app was launched in 2023, providing unprecedented accessibility to valuable data. "The app is easy to use and allows you to plug right into the latest facts and figures. The charts are updated weekly. Even when attending ESNS, between catching an exciting artist perform or discussing an act with other professionals, you can dive right into the latest data on your phone. ESNS24 artists have already been added!"

As for what's next, Oskar Strajn (ESNS booker and project lead of ESNS Radar and Analytics) looks ahead with excitement: "we invite you to dive into the ESNS24 conference programme to find out exactly what we are up to with ESNS Radar for 2024. Keep your eyes peeled for a big reveal awaiting at ESNS24; I only have one word for you, EMERGE."

Discover the untapped potential of ESNS Radar and Analytics now at radar.esns.nl or download the app.



Five trends that shaped the ESNS Radar charts in 2023



by Menno Visser
Music journalist and radio programmer

Data, lots of data... Every week the ESNS Radar chart measures which European songs break borders on radio and streaming. Now that 2023 draws to a close, which trends emerge from monitoring the European radio plays and streaming data? If you look at the tracks that find success outside the country of origin, the following five conclusions can be drawn.

1

The influence of TikTok is huge

Social media app TikTok's influence on the European music scene can be easily found in the ESNS Radar Year-end charts. For example, 'Escapism' (*Human Sources*) by British R'n'B singer **Raye** is in the Top 100 twice: The normal tempo version at #5, of course, and also the 'sped-up' version appears at #56. (Sped-up versions are a hugely popular TikTok trend that sound just like if you play a vinyl album at the wrong speed of 45 rpm.)



But there's another sign that suggests that TikTok is shaking the European music world: There are no less than thirteen non-Christmas tracks in the main Top 100 that were released more than three years ago. Led by 'Another Love' (Sony) at #3 by British singer-songwriter **Tom Odell**, a 2013 song trending on TikTok after it was repeatedly used to accompany footage of the invasion of Ukraine by Russia. Word on TikTok is: Vibe is more important than a song's release date on the platform.

2

Brexit dents the spread of new British music

Pop music is an important export product for Great Britain. If we look at the main ESNS Radar Year-end chart for 2023, more than two-thirds of the songs are British. This is approximately the same number as last year's Year-end chart – even a little bit higher thanks to many British Christmas evergreens, which didn't appear in last year's Year-end chart as the last two months of data were not included in 2022.

But the Brexit difficulties reveal themselves in the Emerging year-end chart, which only tracks songs from artists who released their debut single less than three years ago. There 'only' 39 tracks are from British origin, a far cry from the predominance in the main chart. Possible reasons for that gap could be the difficulties at customs British bands are facing on tour, for instance.

3

The German hip-hop scene is thriving

The space the British acts have given up in the Emerging year-end chart, has been easily claimed by German hip hop acts. There are no less than 31 German acts in that chart, mostly hip hop and R'n'B. German songs easily cross over to other German-speaking countries like Austria and Switzerland. German R'n'B' chanteuse **Ayliva** appears no less than six times in the Emerging chart, her most popular song is 'Sie Weiß' (*Warner*) at #10.





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4 Radio and streaming tell two different stories

If you look at the separate ESNS Radar Year-end charts for streaming and airplay, they reveal two different stories. Only four tracks feature in both Top 10s. And some tracks in the streaming Top 10 don't even show up in Top 100 airplay, and vice versa. The above mentioned 'Another Love' by **Tom Odell** is #2 in streaming, for example, but nowhere to be found in airplay, as it is seen on radio as just an old track. On the other hand, radio favourite 'Forget Me' (*Universal*) by British singer-songwriter **Lewis Capaldi** at #8 sees radio as a feel-good track, but is not so popular on streaming.



5 The ESNS Festival is a springboard into the Europe scene for pop acts

During the ESNS Festival, a lot of attention goes to the acts that give a stellar performance on stage. Mostly, these acts are more edgy, like the most booked act of ESNS 2023: Belgian indie rock band **The Haunted Youth**. According to the ESNS Exchange program data they were booked at 13 European festivals this year. But turning to the ESNS Radar Year-end chart, and you can see that pop acts perform well, measured by streaming and airplay. British pop singer **Mimi Webb** appears three times and Irish singer-songwriter **Cian Ducrot** shows up twice in the Top 10. The bottom line is, the ESNS Festival is a great introduction to European success for pop acts.



ESNS Radar chart

Data by Soundcharts Radar

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. The website also features the TikTok Chart for frontrunning music on the social media platform. 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, United Kingdom, Iceland, North Macedonia, Moldova, Montenegro, Norway, San Marino, Serbia, Switzerland, and Ukraine.



* Data includes information from November 1st - November 1st
** Data is based on available EBU Airplay & Streaming (from YouTube and Spotify) data
*** ESNS Chart includes artists from ESNS 2021, 2022, and 2023 lineup
**** For more details on methodology please refer to radar.esns.nl/about

All European artists per year Airplay & Streaming TOP10

1		DAVID GUETTA <small>FR</small> I'm Good (Blue) AT BA BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD MK MT NL NO PL PT RO RS SE SI SK SM UA
2		HARRY STYLES <small>GB</small> As It Was AL AT BA BE BG CH CZ DE DK EE ES FI FR GB GE GR HR HU IE IS IT LT LU LV MD MEMK MT NL NO PL PT RO RS SE SI SK SM UA
3		TOM ODELL <small>GB</small> Another Love AT BA 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 RS SE SI SK UA
4		DUA LIPA <small>GB</small> Dance The Night AL AT BA BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD MK MT NL NO PL PT RO RS SE SI SK SM UA
5		RAYE <small>GB</small> Escapism. 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 UA
6		DAVID GUETTA <small>FR</small> Baby Don't Hurt Me AL AT BE BG CH CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LT LU LV MD MK MT NL NO PL PT RO SE SI SK SM UA
7		ED SHEERAN <small>GB</small> Eyes Closed Talking AL AT BA BE BG CH CZ DE DK EE ES FI FR GB GE GR HR HU IE IS IT LT LU LV MD MK MT NL NO PL PT RO RS SE SI SK SM
8		ROSA LINN <small>AM</small> snap AL AT BA BE BG CH CY 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
9		CENTRAL CEE <small>GB</small> sprinter AL AT BE BG CH CZ DE DK EE ES FI FR GB GR HU IE IS IT LT LU LV NL NO PL PT RO SE SI SK SM
10		CALVIN HARRIS <small>GB</small> Miracle AT BA BE BG CH CZ DE DK EE ES FI FR GB GE GR HU IE IS IT LT LU LV MD MK MT NL NO PL PT SE SK SM

Emerging artists per year Airplay & Streaming TOP10

1		ROSA LINN <small>AM</small> Snap AL AT BA BE BG CH CY 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		PINKPANTHERESS <small>GB</small> Boys a liar Pt.2 AL 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
3		MAE STEPHENS <small>GB</small> If We Ever Broke Up AT BA BE CH CZ DE DK EE FI FR GB HU IE IT LT LV MT NL NO PL SE SI SM
4		CIAN DUCROT <small>IE</small> I'll Be Waiting AT BE CH DE DK FI GB HR IE MT NL NO SE
5		CASSÖ <small>GB</small> Prada AT BE CH CZ DE DK EE ES FI GB HU IE IS LT LU LV NL NO PL SE SK
6		SOUTHSTAR <small>DE</small> Miss You AT BE CH CZ DE DK EE ES FI GB HU IE IS LT LU LV NL NO PL SE SK
7		ROMY <small>GB</small> Enjoy Your Life AT BE BG CH CZ DE DK EE ES FI GB HU IE IS LT LU LV NL NO PL RO SE SK UA
8		LF SYSTEM <small>UK</small> Afraid To Feel BA BE BG CH DE DK EE FI GB HR HU IE IS IT LT LU LV MT NL NO PL SE SI SK
9		MIMI WEBB <small>GB</small> Red Flags AL CH DE DK FI GB HU IE MT NO SE SI
10		AYLIVA <small>DE</small> Sie weiß AT CH DE LU

ESNS artists per year Airplay & Streaming TOP10

1		MEDUZA <small>IT</small> Bad Memories AL AT BA BE BG CH CZ DE DK EE FI GB GR HR HU IE IS IT LT LU LV MD MK MT NL NO PL PT RO SE SK SM UA
2		CIAN DUCROT <small>IE</small> I'll Be Waiting AT BE CH DE DK FI GB HR IE MT NL NO SE
3		MIMI WEBB <small>GB</small> Red Flags AL CH DE DK FI GB HU IE MT NO SE SI
4		INHALER <small>IE</small> Love Will Get You BE CH DK ES GB IE IS IT MD NL PL RO SE SI SK SM
5		YELLOWSTRAPS <small>BE</small> Notice DE FR
6		BECKY HILL <small>GB</small> Crazy What Love Can Do AT BE BG CH CZ DE DK EE ES FI FR GB GE HR HU IE IS IT LT LU LV MD MT NL NO PL RO SE SK SM
7		CIAN DUCROT <small>IE</small> Heaven BE FI GB IENL
8		MIMI WEBB <small>GB</small> Ghost of You BE BG DK FI GB HU IE MD MT NO SE SI
9		GOLDBAND <small>NL</small> Noodgeval BE NL
10		MIMI WEBB <small>GB</small> Freezing BE BG CH DE DK FI GB IE MT NO SE

Celebrating 20 years

By Sarah Jamieson
Managing Editor, DIY Magazine



of ESNS Exchange

Even at a quick glance, the results that have come out of ESNS Exchange’s twenty-year tenure are staggering. Since its launch in 2003, the programme – formerly known as the European Talent Exchange Programme – has seen 2,158 artists, from 36 different countries, take to stages across Europe for 5,333 live shows. Those numbers alone help to demonstrate just how integral the ESNS Exchange has become to the European music industry.

“ESNS was a massive step in my career”

Dua Lipa

This track record of success – of helping to break the bands of the future – can be seen throughout the two decades of ESNS Exchange. In 2004, Scottish quartet **Franz Ferdinand** performed at Eurosonic Noorderslag in January before releasing their Mercury Prize-winning self-titled debut just a few weeks later; that year alone they secured 12 festival bookings and catapulted themselves to becoming a mainstay on festival line-ups through to the present day. Then, 2008 alone saw Swedish pop icons **Lykki Li** and **Robyn** both earn a slew of bookings, alongside Scottish producer **Calvin Harris**, fresh from releasing his debut / *Created Disco*. Harris would not only go on to win an array of awards across the world, including four GRAMMYS – but would also be named as one of the highest paid producers in the world, period.

Throughout more recent years, ESNS Exchange has still worked to give artists the help and support they need in order to be able to break into new territories. Huge British acts such as **Stormzy** and **Dua Lipa** were both part of the programme back in 2016 – securing ten festival bookings between them – and now, today, are considered festival headliners across Europe, with Dua undertaking a huge European tour last summer, that included slots at ESNS Exchange festival partners Open'er, Roskilde and Sziget, among others. “ESNS was a massive step in my career,” Dua has said herself, of her involvement in the programme, and it’s perhaps this example that best showcases how, when a symbiotic relationship between artist, festival and fan is nurtured effectively and all work to support one another, it really can achieve the best possible outcome for all parties.

Granted, nowadays, there are all manner of metrics and data samples which can be used to define the success of an artist; from Spotify streams to YouTube views, record sales through to TikTok followers, these numbers can be constantly debated and analysed with the primary goal of breaking an artist to the masses. And yet, still, there is little more powerful than the simple act of an artist playing live, and the connection formed with their fans.

That’s something that ESNS Exchange really understands. With its primary aim being to connect artists with festivals and events from across the continent, the programme also provides the perfect illustration of the power of live performances, and just how important they can be in both the growth of an act, and their lasting, long-term success. Look, for example, at some of the artists from the inaugural year of ESNS Exchange: Norway’s **Kaizers Orchestra** – who received four festival bookings in four different countries that year – are currently in the midst of an entirely sold out 56-date residency in Norway to celebrate their 2022 Greatest Hits, while elsewhere on that year’s Artist Chart, a little known band called **The Libertines** were booked to play at Germany’s Haldern Pop following the release of their iconic debut *Up the Bracket*.

Even following the Covid-19 pandemic, and the adverse effect that it had on the live and touring industries, ESNS Exchange still maintained its support for young artists, and – via virtual events and its full return to a live capacity this year – has continued to uplift them. In 2022’s Artist Chart, the likes of Swiss-Tamil artist **Priya Ragu**, Ireland’s **CMAT**, and UK acts **Yard Act** and **Wet Leg** all secured a huge number of festival bookings, giving them the opportunity to showcase their music and begin the kinds of long-lasting relationships with overseas audiences that will undoubtedly outlast algorithms and trends. And it’s for this reason that the success of ESNS Exchange is so important to the music industry as a whole; data can be manipulated and technology will inevitably continue to shift the goalposts, but the tangible, real life connection between an artist and its audience is near impossible to recreate without dedicated investment and support; something that, over the past twenty years, ESNS Exchange has been at the forefront of. Long may it continue.

Real name Jojo Orme, Heartworms enjoyed a breakout 2023, which kicked into gear as a direct result of performing at ESNS (Eurosonic Noorderslag) with her live band in January. Now, a year on from her two showcases at the festival, the South London-based alternative rock artist, who is managed by Raw Power and represented by Wet Leg agent Adele Slater at Wasserman Music, is on the verge of a real breakthrough.

Heartworms

CASE-STUDY

Late in 2022, Heartworms signed to Dan Carey's Speedy Wunderground label, also based in South London, and in 2023 released her debut EP *A Comforting Notion*. Her most recent release was November's 'May I Comply', which was produced by Carey, who has worked with a host of recent UK breakouts including **Goat Girl**, **Black Midi**, **Wet Leg**, **PVA** and more.

November saw Heartworms play her biggest UK show to date at London's Village Underground, while she also returned to the Netherlands in December to play shows in Maastricht, Nijmegen and The Hague.

Heartworms had only released one single, '*Consistent Dedication*', prior to appearing at ESNS. Now, the post-punk act boasts a total of 22,826 monthly listeners on Spotify, where her following has been on a steady upward curve since ESNS 2023. '*Consistent Dedication*' is Heartworms' most streamed track on the platform, with 304,510 total plays, while '*Retributions Of An Awful Life*' has 267,712.

Heartworms' list of most played tracks on Spotify is completed by '*24 Hours*' (75,746), '*A Comforting Notion*' (43,826) and '*May I Comply*' (23,235), while the act's tracks have appeared on playlists including *The Other List* and *Hot New Bands*.

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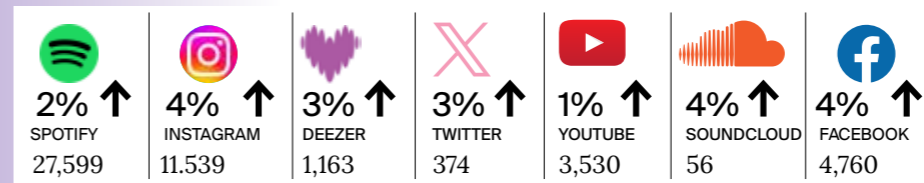
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After the UK's majority share, the Netherlands is Heartworms' second most popular territory on Spotify, showing the positive impact of exposure at ESNS. Amsterdam, Rotterdam, Utrecht, Nijmegen and The Hague all feature in the locations list for Heartworms fans in the country. Beyond that, Heartworms has listeners on Spotify based in the USA, Germany, Australia, Canada, France, Belgium, Spain, Ireland, Sweden, Finland, Portugal, Czechia, Italy, Mexico, Poland and Japan.

These impressive Spotify numbers, which also include almost 8,000 followers on the service, have been boosted by a strong airplay performance. BBC Radio 6 Music Breakfast Show host Laverne previously premiered 'Consistent Dedication' and did the same for 'May I Comply' in November.

6 Music's emphatic seal of approval is far from the only recognition Heartworms has received at radio since playing ESNS. 'Retributions Of An Awful Life' has most plays, with seven on French station Radio Campus Besançon and six on Pinguin Radio in the Netherlands. '24 Hours' has five plays via Radio Primavera in Germany, while 'Consistent Dedication' has four plays on Australian station FBI. Heartworms has also enjoyed radio airplay in Switzerland, Lithuania, Portugal, the USA and Canada. At the same time, Heartworms is building her profile across social media, and follower counts on Instagram, TikTok, Facebook, Twitter and YouTube have all risen since the ESNS shows.

Spotify is responsible for the majority of Heartworms' 25,000+ total follower count, with Instagram and TikTok (both almost 7,000), Facebook and YouTube (both around 1,700) and Twitter (approximately 1,000) also on the up.

ESNS data shows that Heartworms has enjoyed the steepest curve in engagement on Spotify, where her follower count was at 1,664 before playing the event. On Instagram, Heartworms has added almost 4,000 followers since January 2023. At the time of writing, Twitter is enjoying the strongest growth in followers for Heartworms, with a 25% increase over a 28-day period.

In the music press, Heartworms were tipped by numerous outlets at the start of 2023, including the UK-based NME, which also picked Jojo Orme's project as one of "10 unmissable artists" at ESNS. NME later reviewed the A Comforting Notion EP with the line, "say hello to the next cult band" and included the record in its 'Best Of The Year so far' list.

Heartworms firmly caught the attention at ESNS, with Clash offering a glowing review of one of the band's two sets.

"Heartworms' darkly layered post-punk comes to life on the intimate European stage," Clash wrote. "Despite her young age, the artist has fought a lot in her life, she fought for what she believed in; equality and the right to pursue the career she was keen on. Now on a stage in the Netherlands, she uses her musical toolbox to create gothic vibes and gives a performance that is fully engrossing. It's a confident display that leaves a mark, and the crowd members are clearly into what they are seeing. Heartworms pack a great punch."

Having already played DOOR and Down The Rabbit Hole with the support of the ESNS Exchange Programme, Heartworms's trajectory will surely continue into 2024, with a US tour with The Kills on the horizon. Jojo Orme has already come a long way since ESNS, and is primed to go even further.



Heartworms'
darkly layered
post-punk
comes to life
on the intimate
European
stage

Festival line-up database hints at Covid recovery and Brexit impact



As the ESNS Exchange programme marks its 20th year of operations, the team behind its comprehensive database are tracking some interesting new industry trends. Among the most noteworthy insights, the data suggests that the fallout from Brexit is resulting in fewer emerging acts from the United Kingdom securing festival bookings in mainland Europe.

Although 2022's Exchange had to be facilitated online – meaning artists and bands had to perform to camera, rather than live audiences – the system set up by ESNS produced particularly strong results, with 348 slots at festivals around Europe reserved for 148 acts that had participated in the Exchange.

Getting back to normality at this year's ESNS gathering, 348 festival slots were secured by 145 acts who had performed through the ESNS Exchange scheme, as thousands of delegates and fans once again packed into Groningen's bars, clubs and unique venues to witness their artistry.

However, the results from the programme suggest a sea change when it comes to acts from the UK, which traditionally has fared well in terms of festival bookings.

This year, just two acts from the UK – **KEG** and **Katie Gregson-MacLeod** – made it into the charts of the 20 most popular acts, in terms of participating ESNS Exchange festival bookers. Contrast that with five acts in the Top 20 during 2022.

Reading further into the data, there were 20 acts from the UK among the 148 in 2022 who secured at least one festival booking. In 2023, there were just 14 UK acts among the list of successes, perhaps highlighting the prohibitive expense and red tape that British talent is having to endure in its efforts to perform in the European Union.

On the flip side, fewer British acts on the European festival circuit is prompting bookers to provide opportunities to acts from neighbouring countries, as well as elevate homegrown talent on line-ups – a phenomena that helped many territories accelerate their recovery from the pandemic lockdowns.

Addressing the UK issue, ESNS head of programme and booker, Robert Meijerink, says he and his team have pivoted to spread their attention outside of England when looking at acts from the UK. "Brexit is a fact of life, but we decided two years ago to strengthen our cooperation with Scotland, Wales and Northern Ireland, and that is now paying off thanks to our existing partnerships with PRS For Music and the BBC," says Meijerink.

Indeed, far from considering fewer British acts for the January event, Meijerink reveals that there were 700 UK applications for showcase slots at next year's Eurosonic. "We're going to have about 300 acts performing live

during Eurosonic, with about 18 from across the United Kingdom," he adds. "That compares with 16 from Germany, 13 from France – we are still booking – and 13 acts from Poland, which is our focus country partner. It's shaping up to be another great year with lots of exciting new talent from everywhere across Europe."

With such wide-reaching aspirations to find a new generation of headliners, the ESNS database makes for fascinating reading. Thanks to the team who compiles the statistics for ESNS Radar, this year's results tracked every booking across a network of about 130 festivals around the world, meaning more than 11,400 performance slots can now be analysed, post-festival season.

Delving further into that vast information resource, ESNS Radar also splits out artist bookings outside of their home territories, giving observers at-a-glimpse access to identify the acts who are breaking across borders – another invaluable bonus for festival booking teams.

ESNS Exchange opens doors for acts to grow their fanbase

In terms of the most successful acts from this year's ESNS Exchange, at press time **The Haunted Youth**, from Belgium, were top of the charts with an impressive 13 festival bookings throughout 2023 (16 including their home territory) – making its star, Joachim Liebens, one of the most popular acts in the history of the ESNS Exchange scheme.

Highlighting the geographical reach that the ESNS Exchange can offer to artists, Liebens and his **The Haunted Youth** bandmates visited c/o pop, Maifeld Derby, and Orange Blossom Special in Germany; Release Athens in Greece; Pinkpop, and Lowlands in the Netherlands; Siren's Call in Luxembourg; Eurockéennes de Belfort in France; OpenAir St. Gallen, and Montreux in Switzerland; Ypsigrock in Italy; Sziget in Hungary; and Iceland Airwaves, thanks to the exposure he received at Eurosonic.

The information on ESNS Radar is updated live, but by the start of November, Austria's **UCHE YARA** and **The Mary Wallopers** from Ireland had also enjoyed busy summers with ten bookings each through the ESNS Exchange programme, while **Deki Alem** from Sweden had nine bookings. **Avalanche Kaito**, from Belgium, and Dutch talent **Tramhaus** both secured eight bookings, and Ireland's Sprints clocked seven.

‘We must also keep in mind that language around gender is evolving, and it’s crucial to stay open to updates and improvements in how we categorise and discuss gender identities.’

Taking pulse of gender balance in bookings today

by [Connie Chow](#) and [Melissa d’Engelbronner](#)

ESNS has a proven track record for supporting new artists. Over the last 20 years, the event has made significant and commendable strides in achieving progress towards gender balance across its bookings.



Since 2018, ESNS has maintained a remarkable 50/50 split between men and women artists – these results are based on the Keychange standard, a global network and European Union-supported movement working towards reaching full gender equality in the music industry. It would be critical for us to note at this point that within the context of tracking gender balance, the current data does not specify non-binary or non-disclosed genders – we expand on the need for this below.

Returning to the results on gender parity, ESNS’s achievement of an equal split ratio across its line-ups goes beyond a one-time equality measure; it reflects the commitment to change. This normalisation of gender

balance in live bookings paves the way forward for addressing gaps across the entire gender spectrum. Looking at the data from the last five years in more detail – women artists who secured the most bookings during this period include **Arlo Parks, Alyona Alyona, Celeste, CMAT, Flohio, Girl in Red, Pip Blom, Priya Ragu, Sigrid, Yonaka** and **Wet Leg**. All of these artists played a significant number of festival bookings, allowing them to showcase their music and build fan bases internationally. This was also during the global pandemic, which impacted live touring and festivals extensively and forced all events to transition online – including ESNS Exchange, which continued its dedicated support for new artists through virtual events.

Pip
Blomgirl in
red

Heartworms

Alina
Pash

Banji



Sigrid

July
Jones

Celeste



Naaz

Sans
SoucisPriya
Ragu

FLOHIO



Eee Gee

Dea
MatronaMarta
Knight

‘This shift toward counting individuals ensures a more comprehensive and nuanced understanding of gender diversity within the industry.’

Between 2013–2017, it was more of a mixture of genders, but stand-out artists throughout this period include, Danish singer/songwriter, **MØ** - who has since recorded chart-topping tracks with **Major Lazer** and Norwegian songwriter and producer, **Aurora** who herself secured 13 bookings for two years consecutively between 2015 and 2016, making her the most booked artist globally. **Aurora** has since collaborated with **The Chemical Brothers** and wrote her book titled *The Gods We Can Touch*. 2015 was a bumper year with the top 4 acts consisting of women and non-binary artists, including **Aurora**, **Ibeyi**, **Soak**, and non-binary artist **Kae Tempest**. Other stand-out women artists during this period included Finnish singer **Alma**, French duo, **Her**, and **Dua Lipa**; Dua has gone on to headline countless festivals with performances from ESNS Exchange festival partners such as Open'er, Roskilde, Sziget, and many more.

“ESNS was a massive step in my career,” shared Dua Lipa on her participation in the programme. She later won an EBBA Award (now the Music Moves Europe Award) in 2017 which was presented at ESNS.

If we look at the data between 2008 and 2012, this is where things started to change for women artists who saw more bookings secured in comparison to previous years, including a slew of British artists such as **Anna Calvi**, **Blood Red Shoes**, **Ellie Goulding**, **Jessie Ware**, **Marina & The Diamonds**, and **The Ting Tings**, as well as Scandinavian artists such as Danish pop band **The Asteroids Galaxy Tour**, **Agnes Obel** and Swedish pop icons **Lykki Li** and **Robyn**. During this period, **Blood Red Shoes** and **Anna Calvi** both gained 12 bookings between 2008 and 2011, with **The XX** securing 11 bookings in 2010.

Although these artists' success stories are all very positive, the balance is not reflected across the overall European charts, with balance only being reflected across Emerging artist charts – does this mean we're better at programming support acts with women members rather than headliners?

So, what's next and how do we address this? Ultimately, the goal is to foster an inclusive and supportive environment for artists of all gender identities, ensuring that they receive recognition and opportunities based on their talent and contributions to the music industry.

To promote a more accurate and inclusive assessment of gender representation in the music industry, the industry as a whole should adopt the same method: to count statistics based on individual members rather than employing a criterion that relies on the presence of at least one woman member in a band or act. This shift toward counting individuals ensures a more comprehensive and nuanced understanding of gender diversity within the industry, transcending the concept of tokenism and providing a clearer picture of the actual distribution of genders across all musical acts.

Looking ahead, a far more inclusive approach to tracking gender balance would be one that accounts for non-binary artists. This might involve expanding categories beyond a binary classification of men/women and recognising a broader spectrum of gender identities. Recognising a broader spectrum of gender identities is important for fostering inclusivity and provides individuals with the option to select the label that best aligns with their identity. We must also keep in mind that language around gender is evolving, and it's crucial to stay open to updates and improvements in how we categorise and discuss gender identities. Additionally, providing an “Other/Prefer not to say” option allows individuals the flexibility to define their identity in ways that may not be covered by specific labels.

Overall the data over the past 20 years is encouraging in that it shows there are more women artists getting bookings at some of the biggest and most highly-regarded festivals in Europe.

What would also be interesting to know is how many women artists are applying to perform each year and how we can encourage more and also non-binary and gender minority artists. We look forward to seeing how the data evolves and who will be the future female and non-binary artists making waves at the 2024 edition of ESNS.

The search for new audiences and business opportunities for new and established European talent abroad is ultimately driven by the artists and their teams¹.



By Virgo Sillamaa
Research Coordinator, EMEE

Who funds music export development in Europe?

Music export organisations are there to help artists succeed, whether by providing financial support, advice, access to broader professional networks, or promotion. Across Europe, there are vastly diverging circumstances in music ecosystems with regards to knowledge, networks and resources available – and these have been met with a really diverse landscape of organisations and practices. European Music Exporters Exchange (EMEE) recently released its first mapping of music export development in Europe – a report covering 29 music export organisations from 26 countries. The European Music Export Strategy provides an analytical framework to get a better overview of the many activities these organisations do and the report also outlines how they are governed and funded.

companies can easily CROSS European borders to present their music to audiences elsewhere in Europe and from there RISE to the global level, being competitive and successfully getting European music to be heard by music listeners across the world. These goals require support through sector level strategic development. Firstly by European music organisations developing long-term bridges and partnerships with non-EU partners through EXCHANGE of experiences, best practices and business contacts (step 5); and by MEASURING the international success of European talent through a well-organised system of music data collection, analysis and publication of research (step 6). It is easy to see how the ESNS Radar can become a key component of the latter.

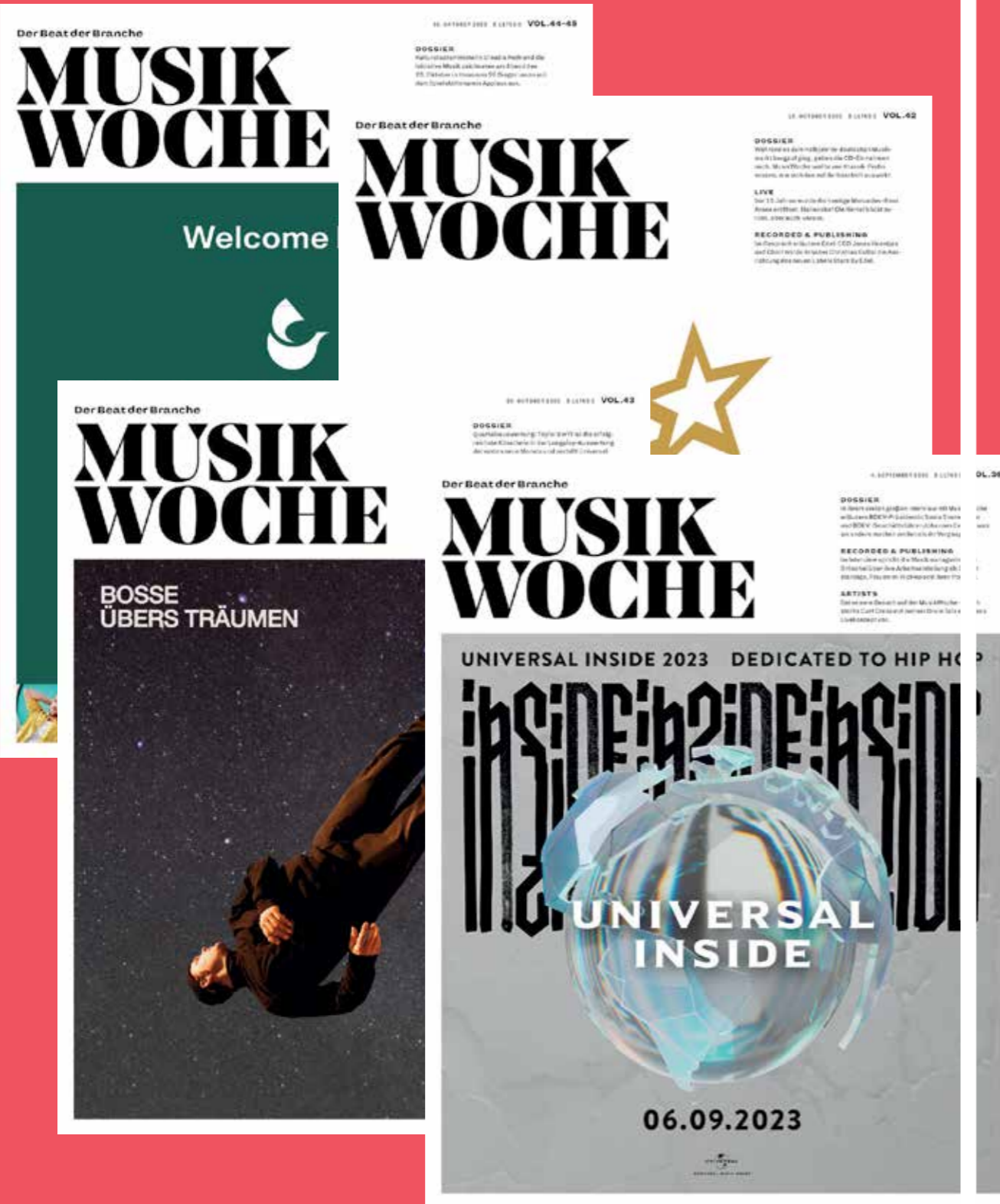
European Music Export Strategy provides a 6-step development path to developing music export capacity in Europe, each with its own strategic goal. Step 1 is concerned with making relevant and up-to-date information and knowledge on music markets and industry trends available for all European music professionals to LEARN and make active use of it. Step 2 is about making sure artists, creators and entrepreneurs find a supportive environment to GROW their knowledge, skills, experience and capacity in every European country. Steps 3 and 4 are about making sure that artists, creators and music



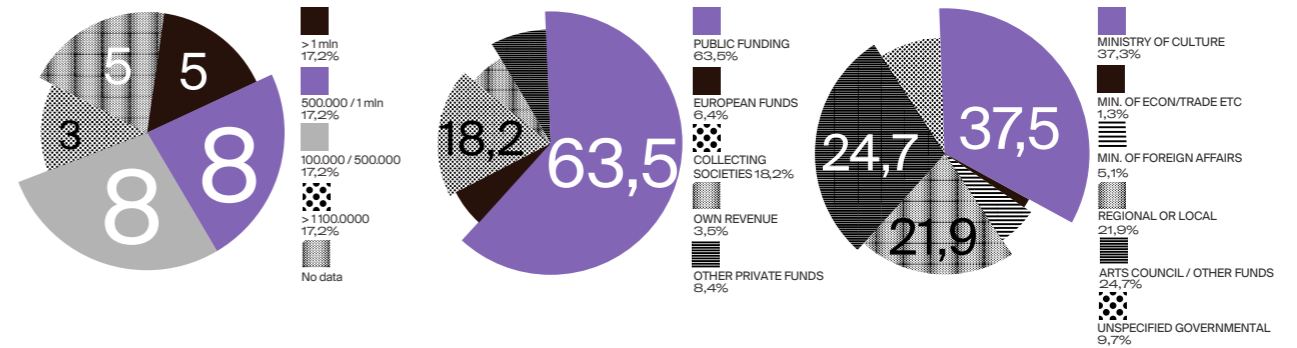
1 This is the position taken in the recent study published by European Commission: "Implementing steps to develop and promote European music export", available <https://op.europa.eu/en/publication-detail/-/publication/24cf4a94-efbf-11ed-a05c-01aa75ed71a1>
2 See <https://www.europeanmusic.eu/content/developing-music-export-in-europe-i/>



the only one



musikwoche.de



Addressing these six steps requires a strategic and coordinated effort, linking the operational needs on the ground with long-term perspectives of policy making. The European music export organisations are crucial in creating this link. But how do these organisations work and who funds this work?

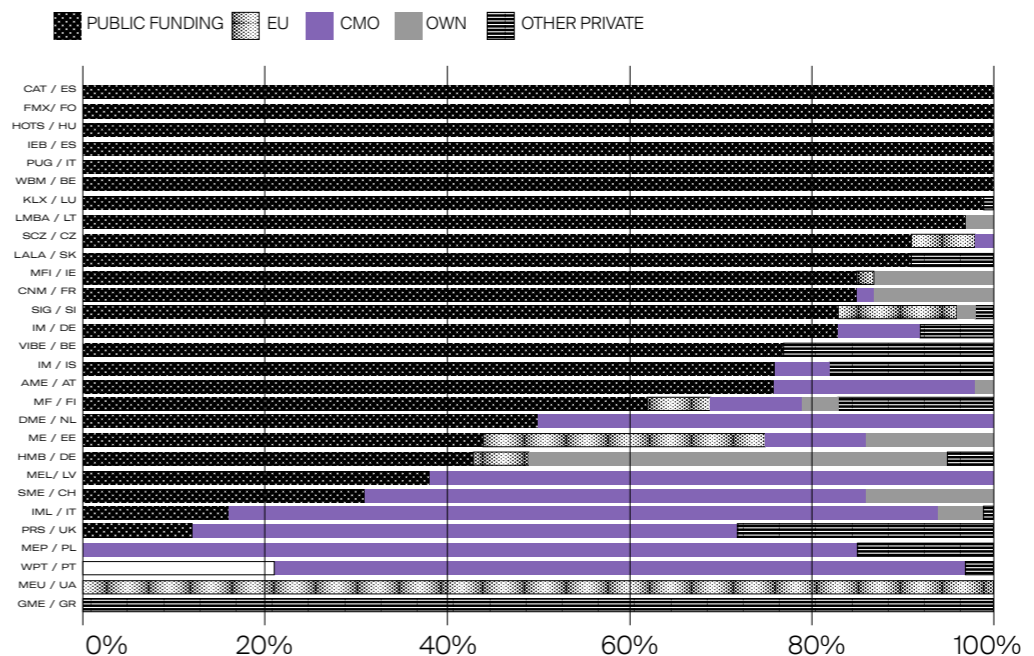
The European music export organisations represent a truly diverse set of approaches. Out of the 29 organisations, eight are public institutions (or partially), 15 are private non-profit associations and six are other types of private entities. Especially among the public institutions, music is commonly only one theme or department among other cultural fields; though there are also organisations focused solely on music (for example the Centre national de la musique (CNM) in France).

Given the diversity of countries and regions in Europe, it is no surprise that the budgets the music export organisations can operate with range from more than one million euros (five organisations) to less than 100,000 euros (three organisations).

Complete financial information is not available for all organisations due to diverging confidentiality policies, but based on averages it becomes clear that public funding plays an important role in the funding mix: 63.5% of the funding (on average) comes from public sources and another 6.4% of European funding (on average) can be added to this. Another important source is the collective management organisations, contributing on average 18.2% to the income mix of the music export organisations.

It is also important to note that more than 60% of the public funding mobilised comes from Ministries of Culture or related arm's length mediaries, such as Arts Councils. In the case of regional organisations, such as Puglia Sounds, Institut Català de les Empreses Culturals or Institut d'Estudis Balearics, the funding cannot be systematically broken down to match policy fields.

However, averages hide the wide range of different funding models. 6 music export organisations are 100% funded from public sources and 17 of those mapped account for more than 75% of their income from public sources. Where the public sources play less or no role, the collective management organisation funding becomes increasingly crucial.



Rolling the dice on

the TikTok algorithm

'The one-hit-wonder phenomenon is a silent killer in the industry, and when the attention span of the crowd runs out, your promising career will have the lifespan of a mayfly.'

by [Lola Deschuytter](#)
[OOR Magazine](#)

It all seems quite simple: upload a video of yourself making music, people watch it and you get the fame and the career you always dreamt of. Unfortunately, for most aspiring artists out there, this is not the case. Your future as a musician (if you rely on TikTok) lies in the hands of the almighty enigma, the daunting unpredictable monster called the algorithm.

TikTok decides via their algorithm which videos are 'worthy' of your For You Page, everything as personalised as possible. The Amsterdam-based group Sarah Julia has taken on this beast and came out as a victor. Starting with no tracks released on streaming platforms, and gaining close to 200,000 followers within a year. The sisters talk openly about their online success.

"We started uploading covers at the beginning of 2023, mainly because a friend urged us to post them. Our main platform for sharing music used to be Instagram, but everything we shared on there stayed within the reach of our own country initially. When we started uploading videos on TikTok, our reach extended. We rolled the dice on the algorithm and not even a year later we got to play shows in London and Los Angeles." The where the source lies of their newfound fame is crystal clear – playing the algorithm to win. Sarah and Julia explain that people sometimes come up to them at gigs and strike up a conversation about TikTok. "Suddenly the numbers on our screens transform into real people who care about our music."

But dreamers beware: TikTok fame has a downside. If you ask the average TikTok user who was behind the song they used in the dance video they just uploaded, a lot of them won't be able to answer you. The one-hit-wonder phenomenon is a silent killer in the industry, and when the attention span of the crowd runs out, your promising career will have the lifespan of a mayfly. Sarah Julia know better than that; they go at it from a whole new angle. "When you, as an artist, upload things on TikTok, you're expected to stick to a certain format. You upload a single, hopefully it goes viral and when it does, you will need to make and release more music as fast as possible to stay relevant. This whole fast-paced process is not really for us, we try to work on projects. When we started uploading covers on TikTok, we had already recorded everything for our upcoming EP. We absolutely didn't want to rush anything, so we decided to build a fanbase before we shared the first single. Now, a year later, we can finally come out of our musical hibernation and share our song 'Cairngorms' with the followers we accumulated over the last year.

When asked about how TikTok fame differs from 'regular' fame, Sarah and Julia can't help but smile a bit. About ten years ago, the sisters appeared on Junior Songfestival, which resulted in them getting a fanbase which mainly consisted of kids and preteens. "We get recognised on the street about the same amount now as ten years ago, but the biggest difference is that nowadays people approach

us to talk to us much more often. When you gain popularity on a TV show, it's quite far from your own reality. TikTok is way more interactive, you feel almost familiar with your fans as they comment on your videos. We try to show as much of ourselves as possible, covering songs that we love so people with the same taste in music gravitate towards us. That way you are able to connect with people you have something in common with."

Sarah Julia have only recently released their first single and yet they already boast a bold success story. "We can't really predict if people are going to listen to our songs solely based on how they are reacting to the covers we upload. The best we can hope for is that people remember our name and feel a connection to our project. We aspire to grow, and every person that sticks along with us on this journey is a lovely bonus."

By following the non-conventional path to online stardom, they secured themselves a spot at ESNS24, turning the digital into reality and abstract numbers into audiences cheering them on. Of course, talent is the first box you need to tick, but Sarah Julia prove there is far more to it than just passion and know-how. In Dutch we have this saying, 'you can't always get a six when you roll the dice'. This absolutely rings true, but Sarah Julia played it smarter than just rolling a common dice. By gaining a loving fanbase, they made sure that whatever face the die lands on, their voices will be heard.

'Suddenly the numbers on our screens transform into real people who care about our music.'

The Haunted Youth

Have you ever wondered how artists experience making it big in a flash?

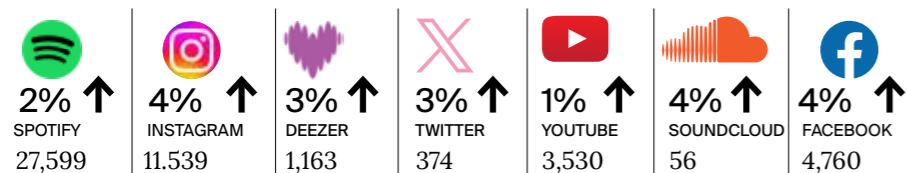
CASE-STUDY

When entering the music industry, artists can take different approaches to get their music and name out there. This article presents how ESNS Analytics can help you discover which strategies can be a road to success. As part of a case study for the Music Business minor at NHL Stenden, we used ESNS Analytics to demonstrate three successful strategies that artists can adopt in the upcoming editions of ESNS—to get more out of their showcases and ensure the most growth. We examine The Haunted Youth as a case study; to understand how the band became the most booked ESNS Exchange act of 2023, with a remarkable 13 shows at ESNS Exchange Festivals.

Preparation is key

A strategic preparation for a showcase at ESNS can be all-important for an artist to break international borders. With over 300 acts performing every year, it is of great importance to establish a strategy for the artist to stand out from the crowd. The Haunted Youth employed a strategy in the build up to ESNS 2022 that showcased their promise—one that is further amplified through their showcase at ESNS 2023 and MME Awards nomination.

The ESNS Analytics follower insights reveal a steady increase in Spotify followers for The Haunted Youth with significant increases around November 2021 and 2022. In December 2021, they announced their performance at ESNS 2022 and released their single 'Gone', resulting in a spike in followers. Looking further down the line, we also see a significant increase around November 2022, the month they released their debut album *Dawn of the Freak*.



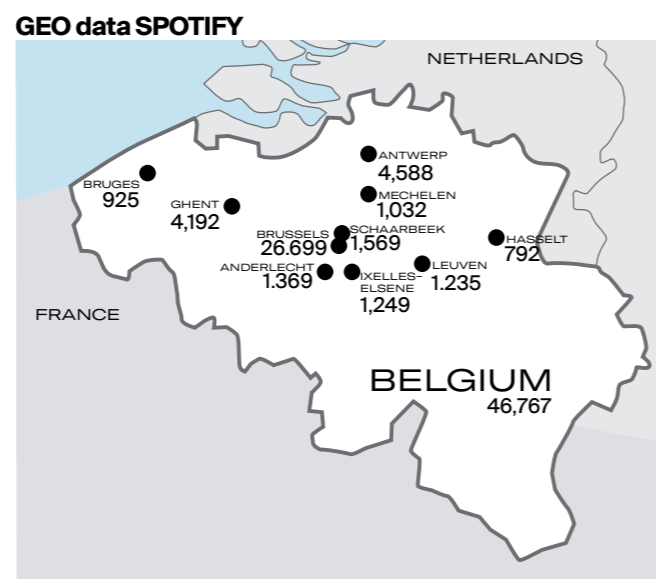
GEO Data

Specific geographical data makes it easier to pinpoint where success is coming from and transform that into opportunities. The GEO data made available in ESNS Analytics gives professionals insights that allow for a more targeted networking approach at the conference. The Haunted Youth's Spotify listeners are centered in Belgium (44.8%) and the Netherlands (41.7%); the ESNS Analytics data on the Instagram, Airplay, and YouTube tabs further supports the claim that their followers are concentrated in these countries. It should come as no surprise, therefore, that the majority of the ESNS Exchange Festivals that booked the Haunted Youth were in these two countries. In 2023, The Haunted Youth performed at Lowlands and Pinkpop in the Netherlands and Rock Werchter, Cactus Festival and Les Nuits Botanique in Belgium. Using GEO data can help form a live strategy by tracking the location of your main Spotify listeners and booking shows that are centered in those areas.

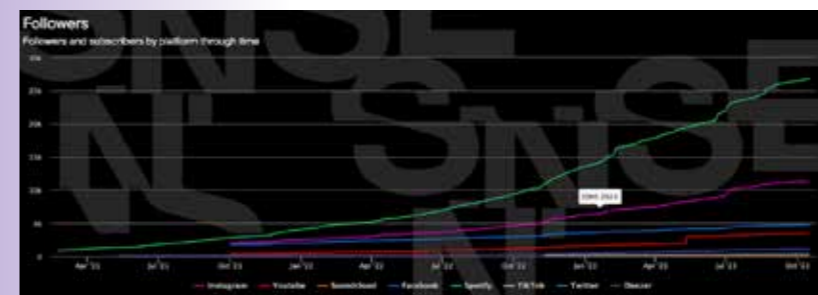
By offering clear insight into the location of established and potential fanbases, ESNS Analytics can quickly and efficiently help professionals further support the artist's growth. For The Haunted Youth, we used GEO data to examine possible opportunities to expand their following internationally in the future and found potential in Germany and France. These countries show support in shows (Orange Blossom Special, c/o pop Festival, Maifield Derby, Eurockéennes de Belfort), airplay and followers.

	Instagram latest followers count	Airplay in the last 28 days	YouTube latest subscribers count	Spotify latest monthly listeners	Booked festivals in 2023
BELGIUM	6,635	52	1,143	43,954	3
NETHERLANDS	1,107	40	298	39,060	2
FRANCE	512	30	198	3,883	1
GERMANY	404	15	99	3,666	3

Country	Percentage of Listeners
Belgium	44.8%
Netherlands	41.7%
France	3.7%
Germany	3.4%
United Kingdom	1.2%
Other	5.1%



Use ESNS Analytics data to keep the ball of success rolling ESNS Analytics can also be used to validate strategies. The initial insights we shared revolved around preparation. Utilizing data can help you to understand how successful artists keep momentum going and support your own strategic decisions. After playing ESNS 2023, we see four spikes in The Haunted Youth's Spotify followers, which we believe leads back to their showcase at ESNS.



While ESNS Analytics's live data centers on ESNS Exchange Festivals – the 126 festivals with which ESNS has partnered with – it is good to mention that The Haunted Youth's success is not limited to these festivals. The ESNS Analytics data does, however, show us the impact of ESNS Exchange Festivals on the follower and listener base. The zoom function in ESNS Analytics shows detailed analysis of the increase in followers. We zoomed in on and pinpoint to specific moments in time that confirm the success of actions mainly in Belgium and the Netherlands. Through ESNS Analytics data, artists can see how they keep their momentum up after playing ESNS by cross-promoting.

Date	Event	What changed?
7 February 2023	TV performance at NPO 1	Spotify
15-18 June 2023	Maifield Derby and Pinkpop	Spotify, Instagram
29 June -4	August Rock Werchter, Eurockéennes de Belfort, OpenAir St. Gallen and Montreux Jazz Festival	Spotify
19-21 August	Lowlands	Spotify

Cross-promotion between platform and event

We used the case of The Haunted Youth to understand strategies that professionals take to create sustained growth for artists. We argue that using ESNS Analytics to analyze artist strategies can allow you to discover patterns to apply to your artists. While we discovered that playing at ESNS paves the way for an artist to get noticed by the industry and audiences, artists still need to push to broaden those options. This case study recommends using the data provided by ESNS Analytics and your network to expand an artist's success. To conclude, the ESNS Analytics platform helps to pinpoint opportunities, validate strategies and build towards sustained growth and international opportunities for artists throughout Europe.



Radars

European Charts
& Festivals insights

Want to see the latest data on ESNS24 artists?

Download the ESNS Radar app!



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.

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