

Assessing the Effects of Brexit On British Artists in European Music Festivals

Introduction

Brexit created new barriers for musicians performing in the UK. New visa restrictions as well as customs and transport barriers displayed the secondary thought applied to the creative sector, worth over £100 bn in the UK economy, during the formation of trade policy (DCMS, 2024). These barriers particularly affect how British musicians early in their career can work in Europe (Musician's Union, 2023). Contemporary, quantitative data of the effects these policies have on musicians is scarce.

Research Aims

This project aimed to evaluate how Brexit has influenced the visibility and participation of UK music talent in European live music markets. Specifically, the research sought to:

- **Quantify** this change in proportion of UK artists performing in European spaces post-Brexit (2015-2025).
- **Compare** these trends with a US control festival (Coachella), to isolate region-specific effects. This is particularly important due to Brexit coinciding with another macro-political event, Covid-19.
- **Assess** whether *emerging* artists were disproportionately affected compared to established acts.

In combination, these aims provide one of the first cohesive quantitative assessments of the cultural impact of Brexit on the UK's live music sector.

Methods / Data Collection

This study used quantitative analysis of festival line-up data to observe changes in international UK artist presence between 2015-2025

The line-up archives were compiled from 3 major European festivals; Primavera Sound (Spain), Pukkelpop (Belgium), Sziget (Hungary) as well as one US control, Coachella (California).

Over 6,000 artist entries were collated from websites. Setlist.fm for festival lineup data, MusicBrainz for artist nationalities, and Kword's annual YouTube top 200 rankings to dictate artist's establishment in context of the year they performed.

Artists were given a binary of Established (1) if they appeared in Kword's YouTube top 200 of that year, otherwise they were marked as Emerging (0).

For each festival and year, the percentage of UK artists and the share of emerging and established artists were calculated.

Findings

Figure 1 shows the average share of UK artists performing at the three European festivals, compared to the control festival, between 2015-2025. Before 2019, the UK was represented in 15-17% of acts in the European Festivals. After the UK's exit from the EU, this dropped to 12%, whereas Coachella remains stable at around 13%. Though modest, this downward shift could indicate a possible post-Brexit decline in British participation in European live music events.

Figures 2a-c show the individual trends for Primavera Sound, Pukkelpop, and Sziget individually. All three show broadly consistent patterns of stable, slightly increasing, UK attendance followed by a mild reduction after the festivals resumed scheduling after COVID (2022-2025). The similarity across these locations strengthens the hypothesis that these changes are regional rather than individual.

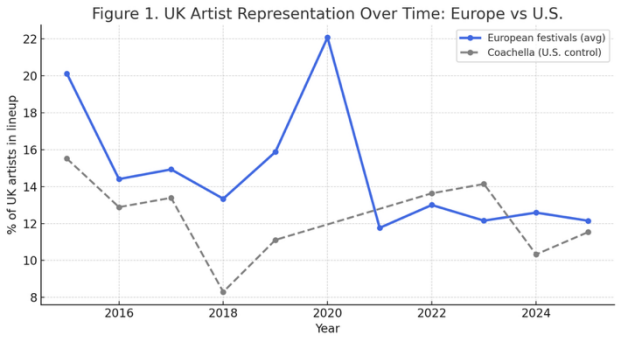


Figure 1.

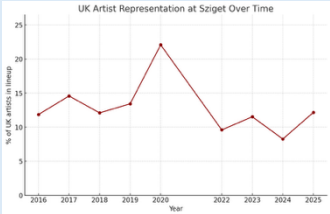


Figure 2a.

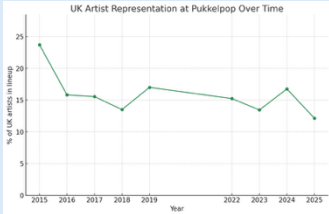


Figure 2b.

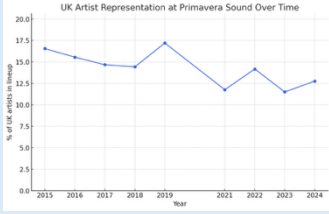


Figure 2c.

Nuance

Figure 3 explores the proportion of emerging against established UK artists. In all datasets, over 95% of acts were classed as emerging. No consistent shift was observed in context of an artist's seniority alone. These results show that, while established acts tour freely, emerging UK talent dominate the contingent and therefore bear the impact of access barriers.

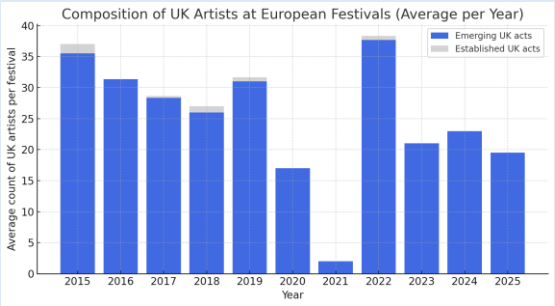


Figure 3.

Summary

Data from the four major music festivals suggests small but consistent reduction in UK artist participation across Europe after 2019. These findings align with wider concerns over reduced European mobility for UK performers (UK Music, 2024).

Limitations and Future Work

The dataset covers a limited number of festivals and years, and the disruption of COVID-19 makes it hard to standardise. Furthermore, for an emerging artist to be observed, they must have some sort of establishment, which is paradoxical, meaning the nuance of how Brexit has affected smaller musicians is one that is hard to define and measure. Future research should expand sample, examine genre differences, and combine quantitative trends with grass route qualitative data from transpiring British musicians.