

The Impact of Live Houses on Local Economies: Evidence from Beijing

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Abstract. As urban economies in the post-pandemic era confront slowed growth and shifting consumption patterns, live houses, as small-scale music venues, have emerged as new nodes of experiential and community-oriented cultural consumption. While their cultural and social contributions have been widely studied, their role as an economic driver remains underexplored. This study investigates the impact of China's live house industry on local economic development, examining the mechanisms and determinants underlying these effects. Using a case study approach, we combine policy analysis, field observations, and secondary data from venue operations, audience behaviors, and platform activities. An Economic Impact Model and PESTEL analysis (Political, Economic, Social, Technological, Environmental, and Legal factors) are employed to systematically capture the multi-dimensional influences on local economic growth. Our findings suggest that live houses not only stimulate cultural participation but also generate small-scale economic circulation across creative sectors. Different live houses exhibit complementary effects that are moderated by their micro-environments. The study highlights their potential as low-threshold incubators for emerging musicians and as vital infrastructure for resilient cultural economies, offering practical implications for urban governance and creative industry development.

Keywords: Live houses, live music venues, night-time economy, urban cultural policy.

1. Introduction

Worldwide, people are shifting part of their consumption away from goods and toward experiences [1]. This trend was first theorised in work on the “experience economy” and has since been documented in travel and leisure data indicating a growing preference for memorable, shared experiences over additional material purchases [2]. In post-COVID China, slower economic growth and weaker household confidence appear to reinforce this tendency [3]. Multilateral monitoring suggests that consumption is constrained by cautious expectations rather than by income alone. As expenditure shifts from goods to experiences, the mode of value creation changes: instead of firms simply delivering products, value is co-produced by audiences through participation, identity work and the formation of communities.

Within this context, experience-oriented cultural spaces have become important instruments in strategies for urban revitalization [4]. National and municipal authorities in China have promoted

night-time economies, cultural-tourism consumption clusters and the adaptive reuse of commercial real estate for small performance venues through a series of policy initiatives. These include night-time cultural and tourism consumption cluster programmes, State Council opinions on stimulating culture-and-tourism demand, “Fourteenth Five-Year” cultural plans, and Beijing’s “New Performance Spaces” policy, which collectively formalise such venues as components of urban cultural infrastructure. At the same time, hundred millions of online music users constitute a large potential audience base that can, at least in principle, be converted into offline participation in live events.

Large, episodic events such as festivals and stadium concerts are already recognised as instruments for boosting tourism and generating short-term local expenditure on accommodation, food, transport and retail [5]. By contrast, live houses—small, high-frequency, community-oriented live music venues—have attracted considerably less attention from an economic perspective, even as they play an expanding role in China’s urban cultural landscape. Typically positioned between a bar and a concert hall, live houses are small indoor spaces, largely standing-room, with professional sound and lighting and capacities from a few hundred up to roughly 2,000 people. While existing research has examined their cultural and social functions, scholars have rarely analysed their economic mechanisms.

This paper addresses that gap by tracing how live houses in Beijing’s dense and internally differentiated ecology contribute to local economic development. It asks how these venues facilitate spending directly and indirectly, and under what types of macro conditions such effects tend to stabilise rather than remain episodic. Empirically, the study employs a comparative case-study design that combines policy analysis, field observation, semi-structured interviews and secondary materials on venue operations, audience behaviour and digital platforms. Analytically, it distinguishes four channels of economic impact—direct, indirect, induced and catalytic—and interprets them through a PESTEL lens. Through such approaches, this research adds an empirically grounded, meso-level perspective on the economic contribution of creative industries to urban development and their potential as a significant driver of local growth.

2. Literature review

2.1. Structure

Contemporary Chinese scholarship increasingly conceptualizes the live house as both a physical venue and a symbolic node in youth and subcultural life, often noting genealogies from Japan’s “live house” model and its localization in Chinese cities [6]. Typical portrayals emphasize compact, standing-room rooms with minimal stage barriers, scene-driven booking, and repeated attendance in tight cycles—features that differentiate them from commercial nightclubs or stadium shows. For instance, Beijing’s Omni Space and Dongcheng’s Le Space exemplify this “intimate hardware plus scene programming” configuration frequently described in Chinese scene writing and venue guides (Tencent News “Beijing LiveHouse Map”). These cases illustrate how venue architecture, proximity, and repeated rituals co-produce dense sociality and attachment. This reading aligns with classic subculture theory that treats such sites as arenas where style, affect, and belonging are produced and negotiated against mainstream institutions [7]. Within this frame, live houses function as infrastructures for identity work: fans enact distance from mainstream pop, build peer groups, and accumulate “subcultural capital” via embodied practices (moshing, sing-alongs, coded dress/gestures) and participation in “scenes” that blend online circulation with offline co-presence. Specifically, recent Chinese work adds that live houses often perform three concurrent roles: (1)

performance stages for touring or label showcases; (2) regular social spaces for local scenes; and (3) hybrid “third places” that host micro-entrepreneurship (bartenders, sound engineers, freelance designers, zine and merch sellers)—a multifunctionality that underpins their economic weight [6]. In short, live houses are not merely “stages” but subcultural infrastructures with thick social and symbolic lives; yet most studies still prioritize meaning/identity over systematic tracing of monetary flows across venue types and neighborhoods.

Beyond subcultural meanings, cultural-economy and urban studies literature shows that live music venues can anchor agglomeration economies, attract visitors, and support adjacent consumption (such as bars, restaurants, mobility), while feeding city branding and “music city” strategies [8]. These accounts distinguish multiple mechanisms: direct takings (tickets, bar, merch), indirect/induced “multiplier” effects through supply chains and household re-spending, and catalytic/branding effects that attach stories and images to districts and redirect future footfall. Recent journalism and industry studies further document post-pandemic rebounds in live-music spending (and unevenness across venue scales), offering comparative benchmarks that foreground both growth potential and grassroots fragility [9]. Although many impact studies focus on festivals or flagship arenas, their frameworks translate to high-frequency, small-room circuits: repeated mid-price shows can cumulate to substantial seasonal turnover; standardized sound and lighting as well as staffing create semi-formal creative employment; and narrative visibility across platforms converts to destination-making at neighborhood scale. The literature thus supports reading live houses as micro-infrastructure nodes within broader creative-industry dynamics, while underscoring the need to disaggregate impacts by venue scale, ownership, and location.

A parallel body of work on nightlife governance shows how licensing regimes, zoning, safety, and noise rules both enable and constrain music spaces, often through uneven enforcement and negotiated tolerance [10]. Globally, “night-time economy” agendas and new policy instruments (night mayors, venue categories) seek to balance economic benefits with order, health, and neighborhood concerns. In Beijing, municipal policy has explicitly moved to recognize and steer small and medium performance spaces: the 2019 (updated web-posted 2024) Measures to Promote the Night-time Economy frame culture-commerce-tourism integration, and the 2025 “Support Measures for High-Quality Performing Arts Development” codify incentives, certifications, and management standards—shaping entry barriers, compliance costs, and branding channels for venues [11]. Crucially, these governance arrangements interact with economic mechanisms: transparent access categories and predictable enforcement expand the accessibility of diverse room sizes; tax/fee and sanitation/security co-funding condition profitability under consumption downgrading; and culture-branding plus district-level coordination influence long-run sustainability of venue clusters. Yet relatively few studies integrate policy analysis with fine-grained, venue-level perspectives from subculture research—particularly in China’s post-pandemic context.

Above strands of literature suggest that live houses can be read as subcultural infrastructures, micro-infrastructure nodes in creative-industry circuits, and objects of night-time governance. Yet they also reveal several gaps that motivate the present study. First, most subcultural and scene-based research prioritises meaning and identity, with only limited and often impressionistic tracing of monetary flows across different venue types and neighbourhoods. Second, economic impact and “music city” studies tend to focus on festivals, arenas or citywide indicators, with relatively little attention to the differentiated roles of small, high-frequency rooms by scale, ownership and location, particularly outside Euro-American contexts. Third, work on night-time policy and governance rarely incorporates fine-grained venue-level perspectives, especially in post-pandemic Chinese cities where new support tools coexist with consumption downgrading and regulatory uncertainty.

Building on and extending these literatures, the paper treats Beijing's live-house ecology as a meso-level arena in which subcultural practices, economic circuits and governance arrangements intersect.

3. Data and methods

The analysis draws on two main types of data. First, we compile enterprise, official and media information on venue characteristics—capacity, programming cadence, ticket price bands, staffing patterns, and policy designations—from industry reports and reputable news and policy sources. These materials provide a basic structural picture of Beijing live houses and their position within the local performance market. Second, we rely on field observation, both on-site and online. On-site observation was conducted in Beijing's major live-house clusters (Chaoyang, Dongcheng, Xicheng, Haidian), documenting audience composition, spending cues (tickets, drinks, merchandise), pre- and post-show flows, and spatial relations to bars, food outlets, transit nodes and student housing. We treat live houses as embodied social spaces; participant observation and qualitative interviewing are therefore appropriate tools for capturing affect, identity work and informal exchanges that are not visible in financial statements and administrative records, and are consistent with established ethnographic work on live music and scenes. In parallel, online observation followed platform-based promotion, short-video circulation and user engagement (comments, reposts, “I-was-there” posts) that increasingly mediate offline demand. Together, these sources allow us to triangulate how venues are structured, used and narrated.

In the meantime, this research adopts a comparative case-study design focused on two stylised types of Beijing live houses: large, capitalised rooms with capacities of roughly 800–1,200 people, and small, independent rooms with capacities of roughly 150–300 people. This within-city comparison highlights how venue scale and ownership shape both economic roles and vulnerability under shared macro-conditions. The analysis proceeds in two layers. The first is an economic-impact mapping. For each venue type we trace four channels: (1) direct on-site spending; (2) indirect purchases along supply chains and contracted services; (3) induced neighbourhood re-spending from wages and visitor outlays; and (4) longer-run catalytic effects related to place branding and cultural tourism. This adapts standard impact frameworks from venue and concert studies to the “small, dense, nightly” cadence that characterises live houses. The second layer is a PESTEL-informed interpretation. We examine how the strength and stability of these four channels vary under different political, economic, social, technological, environmental, and legal conditions. Taken together, the two layers allow us to assess not only whether live houses stimulate local circulation, but under what conditions such circulation becomes relatively stable rather than episodic and volatile.

4. Case study analysis

4.1. Live houses in Beijing

Beijing is one of the principal centres for live music and independent performance in contemporary China. The city hosts a large and still evolving ecology of live houses—over ninety in recent years, with new rooms continuing to open in the post-pandemic period. Their spatial distribution is patterned. In Chaoyang District, a number of larger, capital-backed venues with professional sound and lighting, standardised service procedures and strong branding are concentrated; these spaces resemble small concert halls and regularly host touring acts, label-backed showcases and other high-profile events, typically attracting audiences of around 300–1,200 people. In Dongcheng and Xicheng Districts, older, emblematic venues that are central to Beijing's rock and indie histories

persist. These spaces trade on narratives of authenticity, long-term scene loyalty and subcultural memory, and are repeatedly invoked in documentary, journalistic and fan accounts as “classic” live houses. In Haidian, smaller rooms of roughly 200-capacity cluster around universities and student housing, emphasising affordability, experimentation and proximity.

This clustering is economically meaningful. At a basic level, the co-location of multiple live houses in particular districts produces local night-time economies by drawing several hundred young people onto the same streets between roughly 19:00 and 24:00 on weekends. At a more structural level, differentiation by scale and position—capitalised and professional versus intimate and “underground”—generates competition for artists and audiences, which in turn pushes operators to develop distinct programming profiles and brand identities. Research on chain venues such as VAS suggests that professionalisation, superior sound and lighting, and standardised service models are increasingly deployed as competitive advantages in attracting both performers and paying audiences (Xie). At the same time, work on live houses as subcultural spaces warns that such professionalisation risks commercial incorporation into mainstream nightlife and the erosion of the “underground” feel that many scene participants seek [6]. Taken together, Beijing’s live-house ecology can be described as a layered market in which larger rooms function as cultural infrastructure legible to policymakers and tourists, while smaller rooms act as “scene cells” that incubate new bands and sustain committed followings.

4.2. Two typical venue types

Within this ecology, two stylised venue types are analytically useful: large, capitalised venues with capacities of roughly 800–1,200 people (Type A), and small, independent or “underground” rooms with capacities of roughly 150–300 people (Type B). The contrast between MAO Livehouse Beijing and Fulang Livehouse, on the one hand, and venues such as JIANGJINJIU and Le Space, on the other, illustrates this differentiation.

MAO Livehouse Beijing in Chaoyang is an early example of a professionally run, capital-backed live house. With capacity ranging from approximately 400 to 1,000 people, it features a standard stage, high-end lighting and sound, and brand partnerships with beverage and technology companies. Fulang Livehouse, with a capacity of around 1,200, similarly combines bar service, branded events and multi-platform livestreaming. Such venues are tightly integrated with ticketing platforms (for example, Damai and WeChat mini-programs), which facilitates presale management and basic data tracking. They generate substantial direct revenues through ticket and bar sales, underpin relatively stable employment for technicians, security staff, bartenders and event managers, and draw audiences from beyond their immediate neighbourhoods, thereby supporting additional spending on food, transport and, for some visitors, accommodation. At the same time, they are exposed to “consumption downgrading”: high fixed costs for rent, safety compliance and equipment maintenance require consistently strong attendance, making these venues vulnerable when household budgets tighten and increasing their dependence on sponsorship and diversified operations. Heavy reliance on commercial partnerships, in turn, can provoke perceptions of over-commercialisation among core scene participants.

By contrast, venues such as JIANGJINJIU and Le Space, located in Xicheng and Dongcheng respectively, constitute emotional and symbolic centres of Beijing’s independent scene. JIANGJINJIU, opened in 2001, is known for its intimate basement stage and its role in nurturing early Beijing rock bands. Le Space hosts a wide range of events—experimental electronic, indie pop and cross-genre evenings—while keeping ticket prices relatively low (approximately 80–150 RMB) and emphasising physical proximity between performers and audiences. These spaces function as

incubators for emerging musicians and other creative workers. They rely more heavily on drink sales and community loyalty than on corporate sponsorship, and their economic contribution is rooted in dense, repeated participation: fans return weekly or monthly, purchase independent merchandise and support nearby micro-businesses such as snack stalls, small bars and design studios. Operating with lighter formalisation and limited access to subsidies or preferential policy tools, they face unstable cash flows, limited institutional support and frequent complaints about noise and safety from neighbours. Culturally, they are crucial due to their accessibility and low thresholds for participation; financially and regulatorily, they remain precarious and exposed to shocks.

These two archetypes illuminate complementary dynamics. Capitalised venues confer scale and visibility at the district level, functioning as anchors of infrastructure-scale investment and branding, while independent spaces maintain creative experimentation, emotional engagement and grassroots renewal. The coexistence of both types enables Beijing's live-house ecology to be simultaneously commercial and cultural, balancing revenue generation with perceived authenticity.

4.3. Economic effects of live houses in Beijing

Live houses contribute to Beijing's local economy through four interconnected pathways: direct on-site revenue, indirect upstream spending, induced neighbourhood spending and longer-run catalytic and branding effects. These channels operate differently across Type A and Type B venues and are therefore better understood as complementary than as substitutable.

Direct effects arise from ticket sales, bar and snack sales and merchandise transactions. On a typical night, venues sell tickets at the door or via online presales, generate bar and snack income with venue-controlled margins and facilitate sales of CDs, T-shirts, zines and patches either directly or on a revenue-sharing basis with artists. For Type A venues such as Fulang and MAO, larger capacities and mid-range ticket prices mean that a sold-out show can be a significant "big night" in revenue terms; a week containing several such nights aggregates into considerable turnover. For Type B venues such as JIANGJINJIU and Le Space, smaller capacities and lower ticket prices translate into lower per-night revenues, but strong proximity between performers and audiences encourages drink purchases and repeat attendance. Over the course of a month, a dense calendar of smaller shows can produce a relatively stable cash flow.

Indirect effects refer to spending on local goods and services along creative and service supply chains. Both types of venues purchase sound and lighting services, backline rental, door and security labour, cleaning services, freelance photography and video work, graphic design and printing for posters and merchandise, rehearsal-room time, logistics and online promotion. Type A venues, with more professionalised operations, often contract multi-night or seasonal teams, creating ongoing work for technical and security firms concentrated in entertainment districts. Type B venues rely more on gig-based crews who rotate among nearby rooms. This mobility thickens the local creative labour market: although a single 200-capacity show engages fewer workers, high-frequency programming across multiple micro-venues sustains employment for engineers, bartenders, designers and rehearsal studios in hutongs and university areas.

Induced effects capture how wages and visitor outlays are re-spent in surrounding neighbourhoods. Audiences rarely leave immediately after shows. They purchase late-night street food, visit nearby bars, use taxis or ride-hailing services, and, in some cases, book accommodation when travelling across districts. For Type A venues such as Fulang near the Olympic park and MAO at Huaxi LIVE, a broad catchment area means that shows often anchor longer nights out or short trips, distributing expenditure across transport, food and occasional lodging. For Type B venues, induced effects are more tightly localised: weekly flows of students and scene regulars sustain small

restaurants, convenience stores, copy shops and informal bars. The pattern is characterised less by single large spikes than by small, repeated bills night after night.

Finally, catalytic and branding effects unfold over longer horizons as live houses reshape how particular neighbourhoods are narrated and visited. Type A venues such as Fulang, certified as "New Performance Spaces" within the Olympic legacy area, operate as showcaseable cultural infrastructure in municipal branding and tourism materials. Type B venues such as JIANGJINJIU and Le Space anchor narratives of authenticity: images of basement stages, low ceilings and dense crowds circulate on short-video platforms together with street-level markers, while "I-was-there" clips and "must-visit" lists graft stories of "old Beijing rock" or "underground electronics" onto specific blocks. These narratives attract future footfall and help justify further investments in hostels, cafés and design studios.

Taken together, these four pathways show that Type A spaces anchor high gross revenues, formal upstream contracts and a positive city image, whereas Type B venues generate dense, continuous flows of modest transactions, support flexible creative labour markets and produce highly localised induced and catalytic effects through everyday scene-building. The framework provides a basis for analysing how government interventions and venue strategies interact and how policy-industry arrangements might be designed to support both economic and cultural sustainability.

4.4. PESTEL moderators in Beijing

The PESTEL environment in which Beijing's live-house economy works is very tightly linked. Political and legal. Since 2023–25, city programs (like naming certain venues as "new performance spaces") have increasingly changed the way people think about live houses, making them more like cultural infrastructure than just nightlife. This gives them administrative legitimacy and raises compliance expectations (licensing, safety staffing, fire code, ticketing transparency). Money. After the pandemic, "consumption downgrading" makes people more price-sensitive and value-seeking. This is true even though operators have to pay for things like rent, wages, technical upkeep, and security. So, a lot of foot traffic doesn't always mean healthy margins. Social. For young people in cities, live houses are places to "be seen," relax, and keep friendships going. They are like pressure valves and places to belong, which keeps people coming back even when the economy is weak. Technological. Short videos that go viral, comments on platforms, and "I-was-there" proof-of-presence quickly turn online attention into offline flows. The faster this loop spins, the more sudden and intense the local spending surges, but it also gets more volatile. Natural and human factors in the environment. At night, noise, trash, and pedestrian management needs are all more concentrated. These are costs that someone has to pay (extra security and cleaning by venues; tolerance or complaints from neighbors), which means that they are effectively hidden deductions from revenue and limits on programming hours. The second L is for legal. Contracting norms with artists and crews, IP use in recordings and streams, scalping controls, and labor standards all affect how risk is shared and how costs are structured. As the scene becomes more formal, standardization can make the supply chain more professional but also make gatekeeping stricter. Focused consequences for the pathways of economic impact.

(1) Political and legal factors affect accessibility, the cost of compliance, and the ability to turn catalytic effects into real benefits. Formal recognition, like municipal certification, makes things more accessible by lowering the risk of enforcement and speeding up approvals. This makes it possible to have more programs, which is the first step toward having strong direct effects (more show nights) and thick indirect linkages (stable technical crews, standardized vendors). Stronger compliance rules also raise fixed and semi-fixed costs (mandatory security, safety audits, ticketing

rules), which lowers direct revenue margins and makes venues depend more on ancillary lines (bar/merch/brand activations). Politically sanctioned venues can also be used for city branding and cross-promotion, which makes catalytic effects (like district identity and tourism stories) even stronger. But if standardization becomes gatekeeping (for example, stricter content vetting or higher technical thresholds), it can make it harder for new artists to get in, which weakens the incubation pipeline that feeds future demand and, in the end, slows down long-term catalytic renewal.

(2) Social and environmental factors lead to repeat visits, spillovers, and operational drag. Strong social demand—catharsis, recognition, and community—keeps people coming back at prices that are easy to afford. This keeps direct revenues (tickets, bar, and merchandise) stable and makes neighborhood spending (late-night food, mobility) more predictable. When venues are close together, these effects get stronger because communities are concentrated in a few walkable streets week after week. But environmental problems like noise, crowding, and sanitation make mitigation costs go up all the time. These costs don't show up on posters, but they do include extra cleaners, stewards, barriers, and ride-hail staging, which directly lower nightly net income and affect how long audiences stay (and spend) after shows. Poor environmental management makes people less tolerant of their neighbors over time, which raises the risk of complaints and regulatory scrutiny. These conditions shorten operating hours, limit capacity, and dull both induced and catalytic effects. On the other hand, proactive environmental design (soundproofing, waste plans, and crowd-flow coordination with districts) keeps the spillover loop open and the dwell time high.

5. Discussion

The analysis yields two main sets of findings: one concerning how live houses in Beijing influence local economic activity, and the other concerning how the PESTEL environment shapes these effects. On the economic side, the study shows that live houses affect Beijing's local economy through four intertwined channels—direct, indirect, induced and catalytic. Large, capitalised venues such as Fulang, MAO and OMNI generate substantial direct and indirect impacts on a smaller number of high-stakes nights and are especially salient in city branding. Smaller independent venues such as JIANGJINJIU and Le Space produce lower per-night revenues but operate more frequently, sustaining local spending and creative activity over time. Disaggregating these channels by venue type reveals distinct yet complementary roles: large venues anchor infrastructure-scale investments and are legible to policymakers, while small venues function as performance “cells” that attract loyal audiences, provide entry points for emerging artists and support nearby businesses. The live-house economy as a whole thus emerges from the interaction of these diverse roles rather than from any single flagship space.

These economic effects are strongly conditioned by Beijing's PESTEL environment. Political and regulatory changes—such as new performance-space categories, clearer licensing and safety requirements, and selective recognition of “New Performance Spaces”—have created opportunities for some venues while complicating access for others in particular districts. Economic conditions, including post-pandemic household budgets and cost inflation, influence feasible ticket prices and viable capacity levels. Social trends in youth subcultures and a post-COVID desire for collective, embodied experience bolster demand for live music but also generate conflicts with neighbours and other users of urban space. Online ticketing and short-video platforms provide powerful promotional and documentation infrastructures yet tend to favour risk-averse programming and rapid shifts in attention. Environmental and human factors, such as walkability, late-night transport and neighbourhood tolerance, shape who can participate and on what terms. Patterns of legal enforcement further determine whether support policies remain largely symbolic or translate into

everyday security for operators. Together, these elements determine whether the four channels of economic impact take the form of transitory peaks or more durable circulations of expenditure.

This research contributes in three respects. First, it offers a structured account of how live houses are integrated into urban economies through four channels—direct, indirect, induced and catalytic—rather than treating them merely as sites of ticketed leisure. By distinguishing between large, capitalised venues and small, independent spaces, the paper shows that live houses function as platforms for employment, services and neighbourhood-level circulation, not simply as consumption points. Second, it connects micro-scale cultural spaces to meso- and macro-scale urban processes. The analysis demonstrates how decisions about capacity, booking and location at the level of individual venues aggregate into patterns of spending and place-making at the district level, thereby bridging qualitative work on subcultures with more abstract discussions of the “creative economy.” Third, the study situates live houses within a political and governance context, illustrating how licensing, tax and zoning policies shape which kinds of venues can exist and thrive. The findings imply that local policymakers should look beyond a small number of high-profile venues and recognise the contribution of smaller spaces to creative labour markets and local entrepreneurial ecosystems. For scene stakeholders, articulating their activities in broader economic terms can strengthen their position in negotiations over regulation and support.

Building on the PESTEL analysis, the paper proposes an “APS pyramid” as a simple way of visualising how policy and law influence the sustainability of live-house ecologies. The pyramid comprises three levels: accessibility, profitability and sustainability. Accessibility concerns whether venues can exist at all and what sizes and styles are possible, and is shaped by licensing categories, safety codes and zoning provisions that specify where amplified music is permitted, how many people venues may host and under what conditions. Profitability refers to whether venues can consistently cover rent, staff, security and compliance costs; under rising input costs and fluctuating demand, targeted tax relief, cultural subsidies and proportionate regulatory burdens by venue size may be decisive for survival. Sustainability addresses whether live houses are integrated into long-term urban and cultural planning, including the balancing of noise control and cultural value, recognition of live music as part of the city’s brand and the management of coexistence with residents and other land users. Accessibility enables participation, profitability keeps venues operating and sustainability ensures that night-time culture remains a durable cultural and economic asset. Making this three-tier logic explicit helps policymakers see where interventions are currently concentrated and where gaps remain, and can inform the design of more coherent policy–industry arrangements.

The conclusions are subject to several limitations. Empirically, the research is based on a limited number of venues in a single city, drawing on partial financial information, interviews and field observations. The evidence is therefore stronger on mechanisms and perceived effects than on precise magnitudes. Live-house ecologies in smaller cities, industrial towns or tourist destinations may differ substantially in composition and vulnerability. Analytically, the paper focuses primarily on economic and governance dimensions and does not fully address negative externalities such as noise complaints, conflicts with neighbours or potential gentrification pressures around venue clusters. Nor does it systematically assess substitution effects between live houses and other forms of cultural or leisure activity. Future work could combine richer transaction data with formal economic modelling and expand the qualitative lens to include residents, regulators and property owners. Despite these limitations, the mixed-methods approach adopted here provides an initial map of how live houses are embedded in urban economic and governance circuits and offers a starting

point for comparative and longitudinal research on live music, creative industries and urban development.

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