Valuing live music:

The UK Live Music Census 2017 report

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Introduction

The UK's first ever national live music census took place in 2017. For 24 hours from noon on Thursday 9th March, volunteers in cities across the country went out and about to live music events, from pub gigs to massed choirs to arena concerts. Live music censuses took place in our three primary snapshot cities of Glasgow, Newcastle-Gateshead[i] and Oxford while affiliate censuses also ran in Brighton, Leeds and Southampton on 9-10 March and in Liverpool on 1-2 June, the affiliates led by members of UK Music's Music Academic Partnership (MAP).[ii] Nationwide online surveys for musicians, venues, promoters and audiences were online from March until June. The intention of the census project was to help measure live music's social, cultural and economic value, discover what challenges the sector is facing and inform policy to help live music flourish.

Recent years appear to have been extremely challenging for live music venues, particularly those at the smaller end of the spectrum. There have been numerous media reports of British music venues closing because of property development and gentrification of once lively musical neighbourhoods. (For examples, see Pollock 2015; Burrell 2015; Harris 2015) This is due not only to the conversion or even demolition of some venues, but also development *around* venues and the ensuing noise complaints from venues' new residential neighbours. At the time of writing, a number of venues have voiced concerns about threats to

[i] While Newcastle-Gateshead is a city region rather than a city per se, we use the term 'snapshot cities' throughout this report for clarity.
[ii] See https://www.ukmusic.org/skills-academy/music-academic-partnership/

their future. These include Glasgow's King Tut's Wah Wah Hut, Bristol's Thekla, and London's Café Oto, the latter an Arts Council England National Portfolio Organisation (Donohoe 2017; Reilly 2017; Gelder 2017).

The UK Live Music Census provides further evidence that smaller spaces for live music are facing a 'perfect storm' of issues at present which is affecting their long-term viability and sustainability. Some of these are internal – for example, equipment or building repairs. Many are external, such as increased business rates, strict licensing laws and the aforementioned nearby property development.

This report, published in February 2018, sets out the findings of the census. It draws on survey data, both quantitative and qualitative, to bridge the current knowledge gap regarding the specific relationship between the value of live music on the one hand and the current challenges facing the UK's live music sector on the other. It also draws on eighteen semi-structured profile interviews with individual musicians and venue workers in order to provide illustrative examples of some of these challenges.[iii] Workers from small music venues and (music) bars/pubs form the majority of the interviewees – and, indeed, a key focus of the report – as this currently appears to be the area of the sector facing the most pressing challenges. It is also worth noting that, overall, over half of all participating census venues were from the smaller end of the sector.[iv]

[iii] The full versions of these interviews can be found on the project website at http://uklivemusiccensus.org/#report

[iv] 29% of all participating census venues were bars/pubs, 18% were small music venues, and 8% were churches/places of worship.

In a country as diverse as the United Kingdom, it is no easy task to cover all forms of music-making. Live music activity is highly varied even within specific genres or venue types. As a report into working musicians by the Musicians' Union found, there is no such thing as a 'typical' musician (Musicians' Union 2012: 5) and, similarly, there is no such thing as a 'typical' venue or promoter or audience member.

While we have tried to be as inclusive as possible and to cover all genres and types of venue, there were constraints due to resources and the sheer scale of musical activity in the UK.[v] Inevitably, we have been unable to include everything and while of course omissions were unintentional, we would also note that research of this kind is an iterative process and we have pointed where possible in our methodology and toolkit towards ways of mitigating gaps in future work. However, as this report shows, there are still some themes which are common across genres or venue types or regions of the country, from broader notions of value to some of the practical issues facing the sector at present. We hope that by focusing on this vital but often hidden sphere of activity and value, the live music ecology of the UK as a whole will benefit.

While previous work by the music industries umbrella group, UK Music, has measured the economic value of live music, their research has concentrated less on its social and cultural value. This report is not designed to replace the work of UK Music and others in ascertaining the economic value of the sector. Rather it is intended to sit alongside

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[v] Furthermore, the methodology is survey-based and therefore relies on people taking the time and effort to fill out surveys.

such reports in order to attempt to provide a more holistic understanding of the value of live music in the UK, and to discuss this value alongside the current challenges. In this report, then, we consider among other things live music as a catalyst for travel and we examine the key role that live music venues perform in people's lives, as well as examining the barriers to success currently being faced by the sector. In doing so, we hope to provide evidence to policymakers and other stakeholders in order to help them to protect live music and its venues going into the future. We welcome the announcement in January 2018 of a new Digital, Culture, Media & Sport Committee inquiry into live music which will examine music tourism, impact of Brexit, small music venues, ticket abuse, sustainability and the impact of live events (DCMS Committee 2018).

Disclaimer

We should note that although the Musicians' Union, Music Venue Trust, UK Music and various other stakeholder groups have contributed to this project in important ways, the opinions expressed and conclusions drawn are our own.

Key findings

LIVE MUSIC HAS SIGNIFICANT ECONOMIC VALUE

- In Glasgow, the estimated total annual spend on live music is £78.8 million, equating to an equivalent estimated Gross Value Added (GVA) of £36.5 million and an estimated 2,450 Full-Time Equivalent (FTE) jobs.

- In Newcastle-Gateshead, the estimated total annual spend on live music is £43.6 million, equating to an equivalent estimated GVA of £19.9 million and an estimated 1,620 FTE jobs.

- In Oxford, the estimated total annual spend on live music is £10.5 million, equating to an equivalent estimated GVA of £4.8 million and an estimated 350 FTE jobs.

- The census provides further evidence that people now appear to spend more money on live music than recorded music. Nearly half (47%) of respondents to the audience survey spend more than £20 on tickets for concerts/festivals each month while only a quarter (25%) spend the same on recorded music.

- On average, nearly half (49%) of the annual income of those respondents to the musician survey who identify as professional musicians comes from performing live compared to only 3% from recording.

LIVE MUSIC HAS SIGNIFICANT SOCIAL AND CULTURAL VALUE

- Live music enhances social bonding, is mood-enhancing, provides health and well-being benefits, is inspiring, and forms part of people's identity.

- Nearly one in five (18%) of all respondents to the musician survey moved to their current permanent place of residence specifically for more music opportunities. For professional musicians this figure rises to nearly a third (31%).

- Two-thirds (66%) of respondents to the venue survey and nearly half (48%) of respondents to the promoter survey do (unspecified) charity work, while well over half (57%) of the venues and half (50%) of the promoters have informal links with educational communities such as universities and colleges.

THE SMALLER END OF THE LIVE MUSIC SECTOR IS A VITAL PART OF THE LIVE MUSIC ECOLOGY

- Over three-quarters (78%) of respondents to the online audience survey had visited small music venues (under 350 capacity) for live music in the past 12 months, and three-quarters (74%) had visited pubs and bars (for live music).

- Two-thirds (67%) of respondents to the musician survey had performed in small music venues in the past 12 months while nearly two-thirds (64%) had performed in pubs or bars. This is around double the next two venue types (small outdoor spaces at 38% and churches at 31%).

- Over three-quarters (78%) of respondents to the musician survey identifying as being in their formative years and those identifying as ‘emerging’ musicians had performed in small music venues in the past 12 months, and over three-quarters (78%) had performed in bars or pubs.

BUT THE LIVE MUSIC SECTOR IS FACING CHALLENGES, PARTICULARLY AT THE SMALLER END

- Two out of every five (40%) venue online survey respondents identifying as small music venues and a third (33%) of all venue survey respondents said that increased business rates had an extreme, strong or moderate negative impact on their events in the past 12 months.

- One-third (33%) of venue online survey respondents identifying as small music venues and more than one in five (22%) of all venue survey respondents said that planning and property development had a negative impact in the last 12 months.

- Nearly a third (29%) of venue online survey respondents identifying as small music venues and 27% of venue survey respondents said that noise-related complaints had a negative impact in the last 12 months.

- More than one in five (22%) of the respondents to the musician survey had gigs which were negatively affected by noise-related complaints in the last 12 months.

- Nearly two out of every five (39%) respondents to the venue survey said that the increasingly competitive environment between venues and promoters had negatively impacted on their events in the past 12 months.

- Nearly a third (29%) of the respondents to the promoter survey said that venue closure had a negative impact on their events in the past 12 months.

- 68% of respondents to the musician survey said that stagnating pay for musicians makes it difficult to bring in a viable income while this figure rises to 80% for those respondents identifying as professional musicians.

- Over half (54%) of respondents to the musician survey who identify as professional musicians have worked unpaid in the past 12 months.

- Two thirds (66%) of respondents to the musician survey who worked unpaid for what the engager termed ‘exposure’ believe that the exposure did not benefit their career.

- One in five (20%) respondents to the venue survey are not open to under-18s or are only open with some exceptions, suggesting that one in five venues are mostly inaccessible to the next generation of live music fans.

Context

‘Music makes cities, towns and places better. Music makes cities wealthier. Music makes cities more vibrant. Music creates jobs and skills. Music promotes social inclusion. And music is everywhere’. This statement by Shain Shapiro, founder of the Sound Diplomacy consultancy, at a Music:Leeds event[vi] in November 2017 highlights some of the current thinking about the value of music. As Shapiro went on to say, the general idea of using music as a tool to make cities better has been around for hundreds of years. But what does appear to be new is the way in which some local authorities are now starting to recognise the potential for music to bring economic, social and cultural benefits to their city. A report called ‘The mastering of a music city’, published in 2015 by the International Federation of the Phonographic Industry (IFPI) and MusicCanada,[vii] sets out a definition of a music city and the beginnings of a framework for how to tap into music’s potential (IFPI and MusicCanada 2015). The report certainly appears to have caught the imagination of a number of people in cities across the UK, from Brighton to Liverpool to Leeds.[viii] For example, the following excerpt from a profile interview illustrates how

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[vi] The Music:Leeds event at Leeds Town Hall was organised by Sam Nicholls of Leeds Beckett University in collaboration with Leeds City Council to attempt to bring together the various strands of Leeds’ music sector.

[vii] MusicCanada is a non-profit advocacy body which grew out of the Canadian Recording Industry Association and represents the interests of Canada’s music industries.

[viii] For example, a symposium hosted by UK Music and Leeds Beckett University for members of UK Music’s Music Academic Partnership (MAP) was held in Leeds in November 2017, at which a number of speakers mentioned that the IFPI and MusicCanada report was influencing their work. Also see Pennington 2017.

music activists affiliated with the British & Irish Modern Music Institute (BIMM) in Brighton are implementing some of the concepts in the 'music cities' report:

Profile: Chelsea Rixson, Managing Director, Brighton Music Office

The Brighton Music Office (BMO) was launched in September 2016 and is inspired by the concept of 'music cities' that came out of 'The mastering of a music city' report. [That report] defines a 'music city' as a place with a vibrant music economy which could deliver significant economic, employment, cultural and social benefits for the city and gives ideas of best practice for how to boost that economy … The first thing [for the Brighton Music Office] was to connect Brighton's music industry so that they use each other and we keep that revenue in the city rather than it going to London.

We're now working in collaboration with Brighton & Hove City Council as an advisory guide on live music in Brighton. We would like to remain independent from the council, rather than being a part of them, so that we remain unbiased and impartial. The council has commissioned us to write a report about live music, and to develop recommendations for the city to help support the live music community … The council values live music; they see it as the 'golden egg' and understand that if we don't look after it then it could disappear and that this would be a disaster for the city. One thing they want from this report is to make people more aware of how live music benefits the wider Brighton economy, to show how people travelling into the city for live music spend money across a variety of different businesses whilst they are here and not just in live music; for example in restaurants, travel, shopping, hotels, etc. I think that as well as these economic benefits, though, the council are also interested in people’s standard of living and quality of life; they understand that people also need to have fun, that people work hard and deserve to be able to go out and enjoy themselves, and that live music is a massive part of that in Brighton.

The above highlights just one local initiative to better understand the value of live music. It reflects a growing number of initiatives across the UK – and worldwide – to do so, of which the UK Live Music Census is one of the first to do so at a national level.

As well as new ways of thinking about the value of music, recent years have also seen the development of a number of ways of measuring it, from citywide initiatives in Melbourne, Berlin, Austin and Bristol (Music Victoria/City of Melbourne 2012; Creative Footprint 2017; Titan Music Group 2015; Bucks New University/MAP/UK Music 2016), to a regional survey in Victoria (Music SA/Live Music Office 2016), right up to national level in the UK and Australia (UK Music 2017a and 2017b; Live Music Office 2014).

For public arts funders in the UK and the organisations they fund, the need to report and justify their spending has been around for the past three decades (Carnwath and Brown 2014: 30). From an initial focus on economic value in the 1980s and 1990s to more holistic notions of social and cultural value in more recent years, the arts sector has had to gather evidence to demonstrate how their activities have contributed to policy objectives. Government-led initiatives such as the Department for Digital, Culture, Media & Sport’s (DCMS) annual Taking Part survey and the Scottish Government’s Scottish Household Survey provide some measures of engagement in sporting and cultural activities and are designed to understand the value and benefits of engagement. However, such exercises lean heavily towards quantitative data and do not offer much, if any, insight into the complexities of social and cultural value, both of which can be very difficult to measure quantitatively. What sort of units should one use to quantify the pleasure gained from a performance of Beethoven's *Ninth Symphony*, for instance, or the enhanced well-being attained by dancing the night away at a ceilidh?

In an attempt both to identify various components of cultural value and to develop methodologies with which to measure it, the Arts and Humanities Council (AHRC) established the Cultural Value Project in 2012 (Crossick and Kaszynska 2016: 12). Increasing academic and sectoral interest in cultural value was also evidenced by the Warwick Commission on Cultural Value, a year-long inquiry which started in November 2013. Having successfully garnered funding for two projects within this programme, members of the Live Music Exchange[ix] group worked on two projects focused on the cultural value of live music. First was research into The Queen's Hall, Edinburgh (2013-14) which examined cultural value and cultural policy through the lens of a specific venue that plays host to multiple promotional practices. Second was 'From pub to stadium: The ecology of public and commercial investment in British live music venues' (2014), which had more of a geographical focus, looking at a spread of venue types across Glasgow, Leeds and Camden (London). Both these projects drew on the

[ix] See 'About Live Music Exchange' later in this report and also http://livemusicexchange.org

concept of an ‘ecology’ of live music which had been developed by the Live Music Exchange team to better understand the particular conditions in which live music happens in a particular place and time (Behr *et al* 2016a).

The 2013-14 research on the cultural value of enthusiast, state-funded, and commercial live music yielded three key research findings (Behr, Brennan and Cloonan 2016). First, although explanations vary from audiences, artists and promoters as to why they participate in live music, they also share certain characteristics across genres and sometimes challenge stereotypes about genre-specific behaviours. Secondly, venues are a key part of the value of the live music experience; audiences think not only about the music they are going to hear and see, but also about *where* the event is taking place. Characteristics such as intimacy, character and uniqueness have an influence on audience decisions for attendance. Thirdly, local authorities who investigate their local music ecology come to realise the interdependency of venues of different sizes and types. The fortunes of one venue have an effect on other venues in the region.

The second AHRC cultural value project by the same research team on the ecology of public and commercial investment in British live music venues yielded five additional findings (Behr *et al* 2014). First, the weakest point of the live music ecology at present is the small to medium independent venues. Second, policymakers need to pay more heed to the economic and cultural contribution of smaller venues. Local councils often focus their attention on major developments whose key beneficiaries are larger businesses, whilst smaller operators have a harder time impacting on policymaking. Third, the need for a more ‘joined up’ approach across council services is widely acknowledged but not always fully implemented. Fourth, greater harmonisation, where possible, of regulatory regimes and their implementation across the UK could benefit independent and major live music operators alike. Whilst achieving congruence across devolved regions and different local contexts would be difficult, dialogue and agreement on guidance and principles would alleviate the challenges faced by live music practitioners in a sector that simultaneously depends on local context (venues, audiences, councils) and on touring musicians and promoters operating across these contexts. Finally, competition between cities drives investment in infrastructural projects, yet one of the side effects of such regeneration can be a more difficult environment for venues without the commercial or political resources to adapt quickly to gentrification. It is these smaller spaces that provide both performance and social spaces for up-and-coming acts. They feed into an area’s ‘local character’ – its musical history – in a way that makes them difficult to replace.

As a result of the challenges facing music venues, and partly as a result of the AHRC cultural value projects outlined above, the music industries[x] have responded to these challenges in several ways. Our project partners on the second Cultural Value project included UK Music, the key lobbying and representative organisation for the British music industries, as well as membership and related organisations, notably the Musicians’ Union. Shortly after we

[x] We refer to ‘music industries’ plural rather than ‘music industry’ singular throughout this report to refer to the live, recording and publishing industries plus ancillaries as a whole. For more on this see Williamson and Cloonan (2007).

published our report, for instance, Music Venue Trust and the Musicians' Union lobbied for policymakers to adopt an 'agent of change principle' (referred to in that report as 'right of first occupancy') – which had been highlighted in our research – to protect small live music venues.[xi] The Musicians' Union set up the MU Fair Play Venue scheme in 2013 which invites venues to declare their support for the fair treatment of musicians and their opposition to pay-to-play and unfair ticketing deals by signing up to the Fair Play Scheme (Musicians' Union 2018). The now annual Independent Venue Week started in 2014 as a means of celebrating the contribution of independent venues, which they claim form 'the backbone of the live music scene in this country' (Independent Venue Week 2018). Meanwhile, small music venues themselves have joined forces to establish a collective lobbying voice in the form of the Music Venue Trust and Music Venues Alliance (formed in 2014 and 2015 respectively).[xii] To draw media attention to these issues, the

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[xi] The 'Agent of Change' principle places the responsibility for managing the impact of a change to an area or business upon the person or business responsible for that change. 'Agent of Change' should ensure that noise mitigation measures such as sound proofing are put in place before any issues over noise can arise. In 2017 the Welsh Government and the Mayor of London both pledged to adopt the principle in their planning policies (Welsh Government 2017; Greater London Authority 2017) and in January 2018 the Ministry of Housing, Communities & Local Government announced that it will add the 'Agent of Change' principle to the National Planning Policy Framework for England (Ministry of Housing, Communities & Local Government 2018).

[xii] It is worth noting that the Music Venue Trust uses the term 'grassroots' to describe the venues it represents. The Trust's definition of 'grassroots' encompasses intent – *why* the venues do what they do – rather than what a space looks like or how big it is (Whitrick 2017). For the UK Live Music Census, however, it was decided to use a measure that dealt with the requirement of being more easily verifiable from an objective standpoint of

now annual Venues Day was launched by the Music Venue Trust in 2014, and industry conferences such as the Music Cities Convention as part of Brighton Great Escape showcase festival in May 2015 also put the issue in the spotlight.

Beyond the UK, Live DMA was set up in 2012 as a live music network to articulate the challenges faced by live music venues and festivals in Europe, which organises regular surveys of its members (for example, see Live DMA 2018a), an annual conference and other events.[xiii] Further afield in Australia, pioneering work by Dobe Newton in Melbourne would provide the inspiration for the UK Live Music Census. A live music census took place in Melbourne in 2012 and was, we believe, the first attempt to carry out a live music census in a city (Music Victoria/City of Melbourne 2012). It was the indirect result of a local campaign which began in 2010 and came to centre on the Save Live Australia Music (SLAM) campaign. Since then, a number of other attempts to measure the value of live music have been carried out, as listed above, including the first live music census in the UK, carried out in 2015 in Edinburgh by members of the Live Music Exchange team.

By 2015, Edinburgh as a city was the subject of various news reports voicing concern over recent closures (and threats of closure) to a number of local music venues in the city. Inspired by on the work in Melbourne, we undertook a

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an observer unfamiliar with the motivation or intent of the venue operator, in this case size and, to an extent, layout (majority standing or seated events).

[xiii] For example, in Berlin in November 2017 a working group discussed the value of music venues to local authorities which developed ideas around best practice and concrete tools and recommendations for better advocacy within the sector (Live DMA 2018b).

pilot project to better understand what was actually happening in Edinburgh and to provide evidence to policymakers in the City of Edinburgh Council of both the value of live music in the city and the challenges facing those in the sector.

The Edinburgh Live Music Census revealed both the extent of live music in venues not previously covered by assessments of cultural activity and its value to the city. It also flagged up particular issues being faced by musicians and venues in the city. For example, 48% of venues responding to the enumerated survey collected by census takers reported having been affected by ‘noise, planning or development issues’, 42% of respondents to the venue online survey reported currently experiencing issues relating to noise, and 44% of musicians reported that their gigs had been affected by noise restrictions (Behr et al 2015: 4). The city licensing board’s ‘inaudibility clause’[xiv] frequently cropped up in the qualitative comments of the surveys, suggesting that it had a ‘chilling effect’ on venues’ preparedness to put on live music and the kind of music they will provide. After extensive follow-up work with and by Adam Behr and Matt Brennan with the City of Edinburgh Council and its Music Is Audible group, in 2016 the licensing board voted to relax its noise stipulations used for live music, replacing ‘inaudible’ with ‘audible nuisance’.

Building on the success of the Edinburgh census, funding was then sought from the AHRC for a more widespread data gathering exercise across the UK. The aim was to

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[xiv] This was a clause in the local licensing policy stipulating that amplified music be ‘inaudible’ in neighbouring residential properties.

obtain a more robust assessment of the true picture of live music in the UK, and the relationship of smaller spaces for live music – including those whose primary business may not be music related – to the overall musical ecology.

In this UK Live Music Census project, then, we have attempted to address the following questions:

1) What is the state of live music – economically, socially, and culturally – in cities across the UK?
2) How might the data from a live music census be used by policymakers in business and government (locally, nationally and internationally) to ensure a thriving music ecology from amateur through to professional and industrial levels?
3) What are the ongoing challenges that artists, entrepreneurs, venues and policymakers face in creating a rich and diverse live music culture?
4) What tools can academics develop to mobilise industry and citizen interest in British musical culture in order to create a more detailed and dynamic account of the nation's musical life?

In doing so, we hope to provide evidence for policymakers and campaign groups about the value of live music and venues to the UK as a whole, and to better understand the challenges currently facing the sector.

Methodology

Overview

The 2017 UK Live Music Census used five methods:

1) Mapping of local spaces for live music via desk research of local live music listings;
2) Snapshot censuses over 24-hour period in Glasgow, Newcastle-Gateshead and Oxford with affiliate censuses run in Brighton, Leeds and Southampton in March and Liverpool in June;
3) Nationwide online surveys targeting musicians, venues, promoters and audiences;[xv]
4) Shorter follow-up venue surveys; and
5) Profiles of live music stakeholders based on short telephone interviews.

In this way, we combined data from a variety of sources and from different key stakeholders in the live music sector to give a 'rounded' picture about the value of live music and the current challenges facing the sector. Based on three focus groups in London and Edinburgh (see Appendix 3), we developed the questions with our project partners, Music Academic Partnership affiliate institutions (British & Irish Modern Music Institute (BIMM) Brighton, Leeds Beckett University and Southampton Solent University) and other live music stakeholders, which helped to ensure that a broad and relevant range of topics were addressed, such as environmental sustainability and

[xv] We do, however, acknowledge the vital role of other live music stakeholders such as technical staff or instrument manufacturers who were not explicitly included in the original surveys.

accessibility. We also drew on a number of existing studies in order to develop the survey questions.[xvi]

We appreciate that the word 'census' has a specific meaning in statistics, suggesting that everyone in the population is included but it is not used in this way here as survey respondents were self-selecting and hence not necessarily representative of the UK as a whole. We used the word 'census' because it emphasises the sense of a 'snapshot', a marker of the situation at a specific point in time, and also because the word – and hence concept – is recognisable to most adults in the UK. Note also that the UK Live Music Census was restricted to over-18s and to UK-based respondents only.

Mapping local spaces for live music via desk research

In order to map the live music ecology in the three primary snapshot cities – Glasgow, Newcastle-Gateshead and Oxford – the central research team collected data on spaces used for live music in each city including venue type, capacity, location and contact details. To do so, we

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[xvi] These included Amery 2012; Arts Council England / Nordicity / Sound Diplomacy 2015; Association of Independent Festivals 2010; Attitude is Everything 2015; Balarajan *et al* 2011; Behr *et al* 2015; BOP Consulting 2014; Bucks New University/MAP/UK Music 2016; ComRes & Arts Council England 2014; Creative Scotland 2014; Creative Skillset 2014; DCMS 2015; Drever 2010; Guerre 2017; Incorporated Society of Musicians 2012; Julie's Bicycle 2014; Live Music Office 2014; Mayor of London's Music Venues Taskforce 2015; Music Venue Trust 2015; Musicians' Union & DHA Communications 2012; ONS 2011; ONS 2015; Payne and Webber 2007; Reynolds 2008; Scottish Government Social Research 2013; Titan Music Group 2015; Tom Fleming / HMUK 2016; What Next? Cardiff 2016.

‘scraped’ data from events listings websites including national listings sites like *Ents24*, *Songkick*, and *The List*, and more locally based sites including *The Skinny* for Glasgow and *Daily Info* for Oxford.[xvii] To scrape the data we used the free Google Chrome extension tool, Web Scraper.[xviii] This enabled us to construct lists of spaces used for live music in each city for the three months before the snapshot census date, from December 2016 to February 2017. However, because many live music events are not listed on such sites we supplemented the web scraping by checking local ‘street press’ and/or venues’ social media accounts. However, even on the census snapshot date itself new events had to be added as volunteer enumerators came across events which had not been previously identified.

The venue lists were invaluable in establishing which venues were hosting live music events on the snapshot census date, for contacting venues about the census and also for analysis of venue types in each city (see Chapter 8 on snapshot cities). However, we appreciate that venues form just one part of the live music ecology and it may be that for future live music censuses, other components of the ecology should also be mapped such as rehearsal studios and production companies.

[xvii] See also the (currently unpublished) work of Cédric Mesnage of Southampton Solent University which uses data scraping of listings sites and other music online sources to analyse musical tastes in the UK (Mesnage 2017).

[xviii] http://webscraper.io/

For the UK Live Music Census we developed a typology of venue types based on our research in Edinburgh and with guidance from our project partners and other live music stakeholders. The typology used in the UK Live Music Census 2017 can be found in Appendix 2 but note that it has since been developed and that the updated version can be found on the project website.[xix] As with the Edinburgh research addressed in the previous chapter, definitional issues arose as to what does or does not count as live music (Behr *et al* 2015: 24). For the purposes of the census we devised a definition of the live music event which can also be found in Appendix 2 of this report.

Snapshot censuses

Snapshot censuses were carried out by the central research team in Glasgow, Newcastle-Gateshead and Oxford over a 24-hour period from noon on 9th March 2017. The three cities were chosen to give a spread of geographical locations across the UK from the south to the north of England to Scotland, because of the project team's personal connections and local knowledge of the locales, and because we had access to volunteer census takers in those cities. In order to conduct a national live music census that represented best value for money for the research council, affiliate censuses also ran in Brighton, Leeds and Southampton on 9-10 March and in Liverpool on 1-2 June.[xx]

[xix] http://uklivemusiccensus.org/#glossary

[xx] Affiliate censuses were run respectively by Phil Nelson of the British and Irish Institute for Modern Music (BIMM) in Brighton, Sam Nicholls of Leeds Beckett University, Chris Anderton of Southampton Solent University and by Mat Flynn of the University of Liverpool and the Liverpool Institute of

For the 2017 census a Thursday was chosen because this is generally regarded as the point between the quieter end of the week and the weekend and is thus seen as a compromise between Monday and Saturday. The Bristol Live Music Census was also carried out on a Thursday, following consultation as to the most suitable day for the exercise with UK Music's UK Live Music Group (Bucks New University/MAP/UK Music 2016: 16). We chose March for the UK Live Music Census because students were around and available for volunteer enumeration, and also to avoid the quieter summer months and the 'Christmas effect' as December is often a disproportionately busy time for live music compared to the rest of the year. We also avoided major events such as St Patrick's Day and significant sporting events. However, this highlights the paradox of a 24-hour live music census, as first noted in our Edinburgh research (Behr *et al* 2015: 23), which is that there is no such thing as a 'typical' day for live music and yet a census requires the selection of a date that is as 'typical' as possible.

On the snapshot census date in the snapshot cities, volunteers – mostly but not all students – went out and about to as many live music events as possible, collecting data on audiences and venues. The method was based on

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Performing Arts (LIPA), whose institutions are members of UK Music's Music Academic Partnership (MAP) group. Their data feeds into the national data overall but for the purposes of this report we have focused on the material gathered by the central research team in Glasgow, Newcastle-Gateshead and Oxford because this fulfils the remit of our original application to the Arts and Humanities Research Council. We had hoped that a snapshot census would also take place in Wales and/or Northern Ireland but unfortunately on this occasion no affiliate institution was able to organise one within the required timeframe.

the pilot live music census which was undertaken in Edinburgh in June 2015 (Behr *et al* 2015), itself based on the Victorian Live Music Census (Music Victoria/City of Melbourne 2012). The questions were based on those used by the Victoria 2012 and Edinburgh 2015 studies, but amended and adapted following input from the focus groups in London and Edinburgh.

The audience survey on the snapshot census date asked audiences about a wide range of topics, including how much the respondents spent for that event on food/drink, tickets, transport, etc., how far they travelled, where they got the information about the event from, their monthly spend on live music, and personal data on age, gender and postcode. Note that collecting audience data on the spot in busy venues can sometimes be problematic as it depends on factors such as the temperament of the volunteers, the nature of the live music event and how much talking/movement is allowed once the music has begun. Collecting data in pubs is particularly difficult as it is often not entirely clear as to whether people are there for the music or for other purposes. Indeed, motivations for attendance can be mixed, with music existing on a spectrum of priorities for attendance and not necessarily solely a primary or ancillary driver.

The venue observation survey asked the volunteers to collect data on a number of features of the venue and the event on the snapshot census date, including genre, the number of people working at the event (including musicians and DJs), and a headcount of audience members in the venue at the time of observation, as well as the estimated total attendance on the night as gleaned where possible from venue staff. This estimate of audience attendance enabled us to include unticketed events in the overall dataset as it did not rely on box office data. If there was more than one venue survey because there had been more than one event at the venue (e.g. a matinee and an evening performance), both sets of data were added together to give the final audience attendance for that venue on the snapshot census date. If there was more than one venue observation survey because two volunteers collected data from the same venue at the same time, the higher audience headcount figures were used and the lower figures were discarded because only the uppermost headcount was required for each event.

The Edinburgh Live Music Census had used only hard copy surveys on the night of the snapshot census to capture data, alongside online audience, musician and venue surveys. For the UK Live Music Census we also used survey software to capture data digitally on the census snapshot date, which could be inputted directly either into volunteers' smartphones and tablet devices, or into the respondents' devices. This had mixed results, however, with some respondents happy to input the data via volunteers' devices, and others less so. To maximise the return on the audience survey, we also provided census takers with hard copy surveys that they could distribute and collect in the venues they visited where it was appropriate. The hard copy surveys were inputted after the snapshot census and the data combined with those surveys collected digitally.

As with the Edinburgh Live Music Census, providing a clear picture of all live music activity in any city – let alone an entire country – is extremely challenging, particularly given the fluidity of the sector and the underlying issues regarding definition and categorisation of music venues (Behr *et al* 2015: 6). It is therefore difficult to gain a completely comprehensive picture of live music activity in the three snapshot cities featured in Chapter 8, and, as with previous studies, we note that a definitive census is very difficult and that we have therefore done the best we can in terms of coverage given available time and resources.[xxi] Our results are conservative rather than overly optimistic as we obviously did not have capacity to collect data from *every* audience member or venue (or musician or promoter) who was active on the snapshot census date.

Online surveys

The next layer of data collection broadened out the city-based operations to a national level via online surveys in order to build up points of comparison in other areas of the UK. The online surveys were accessed via the project website and were set up on commercially available SmartSurvey software. Respondents were given four options as to which survey they wished to complete – audience, musician, venue or promoter[xxii] – and were allowed to answer more than one survey (although only one of each type). The online surveys were open from 9th March until 30th June and were open a month longer than originally planned in order to capture data for the Liverpool Live Music

[xxi] For example, see Music Victoria/City of Melbourne 2012: 16; Behr *et al* 2015: 39-40.

[xxii] Initially we had not planned on a separate survey for promoters but our focus groups helped us to realise that to omit this key stakeholder group would be an oversight.

Census in June.[xxiii] Volunteers gave out flyers containing links to the surveys on the snapshot census date and posters and flyers were distributed around the snapshot cities, accompanied by a press[xxiv] and social media campaign to encourage participation.

Audience survey

The online audience survey was more extensive than the audience interview survey used on the snapshot census date and contained questions on a variety of topics. These included festival attendance, volunteering, whether respondents had resold tickets in the past year, identification of significant venues, and why respondents value live music in general. Data was later combined with the audience interview data that was collected on the snapshot census date.[xxv] Respondents to the online survey were asked about live music events that they attended on the snapshot census date so that this data could be added to the snapshot census data.[xxvi] Audience members who did not attend an event on the snapshot census date were asked about the last event they attended.

[xxiii] The Liverpool live music census was a late addition to the census project and an extensive institutional ethical approval process meant that it took place later than originally planned.

[xxiv] For all the press coverage of the UK Live Music Census project see http://uklivemusiccensus.org/press/

[xxv] See Appendix 1 for the characteristics of the sample which highlights some of the demographic differences between online survey respondents and snapshot census date respondents, the latter generally being younger than the former.

[xxvi] This had the effect of tempering the data in terms of the age of the respondents as the audience interview respondents tended to be younger than the online survey respondents, which could also have been a result of unconscious bias by the (mostly student) volunteer enumerators.

Musician survey

The musician survey asked musicians about aspects of their musical life such as annual earnings and spend, earnings per gig, travel and transport, and about any external factors impacting on musicians' live music activities. It was promoted to musicians via the research team's networks in each city, across social media and, crucially, by the Musicians' Union and Making Music, the UK's organisation for amateur musicians.

Venue survey

The venue survey was the most extensive of the four surveys and asked questions about venue operation, staffing, policies and licences, sustainability and accessibility, and about activities undertaken by the venue beyond simply putting on live music. It also asked about any issues that venues might have faced over the past 12 months, such as noise or nearby property development, and about how venues themselves understand the cultural value of their activities. The survey asked venues if they were open on the snapshot census date, and, if so, to input data about the event(s). Venue surveys were publicised using the contact lists devised in the mapping exercise described in the previous section, via the research team's own contacts, and also sent out to Music Venue Trust's contacts and members of UK Music's UK Live Music Group, including the O_2 Academy chain of venues. The data from the online venue survey was later combined with the venue observation data to form one unique record for any one venue.

Promoter survey

The promoter survey asked similar questions to the venue survey but without the questions about venue operation.

All the original surveys used for the UK Live Music Census 2017 can be found on the project website.[xxvii] *Note that the surveys have been updated since the March 2017 census and are only included for reference purposes. For the new version of the surveys which form part of the open-source toolkit, go to our website.*[xxviii]

The online surveys contained both quantitative and qualitative open-ended questions, the former in order to provide some hard statistical data, the latter to provide more nuanced data albeit at the expense of requiring a narrower focus. As part of the data analysis, the qualitative data was coded by the Research Associate and the results have been interpreted and presented in this report either as themes or as percentages of the total if appropriate. Of course, analysis of qualitative data in this way is a time-consuming practice, with elements of subjectivity, but we believe that this has provided some useful insights into further aspects of live music's value.

Shorter follow-up venue surveys

Venue staff are often very busy and filling out an online survey is, understandably, not necessarily a priority. The first half of the online survey period was spent telephoning venue staff in the snapshot cities to ask them to complete the survey which had previously been emailed to them. This was very time-consuming as there are hundreds of spaces for live music across the snapshot cities and because the

[xxvii] http://uklivemusiccensus.org/surveys-from-march-2017-census/
[xxviii] http://uklivemusiccensus.org/#toolkit

relevant person was not always available to speak to. In the second half of the online survey period, the Research Associate visited venues in the three primary snapshot cities in person to collect extra data via a shorter follow-up hard copy venue survey. This contained questions including venue capacity, frequency of events, barriers to success and cultural value. Time restrictions meant that sometimes a survey and a stamp-addressed envelope was left with the venue staff if the relevant staff member was unavailable at the time of the visit. This data, again, was combined with the snapshot census date venue observation and nationwide online venue survey data to form one unique record for any particular venue. In cases where more than one survey was completed for any one venue, the hierarchy of data was as follows: 1) venue online survey, 2) venue follow-up survey and 3) venue observation survey.

Profiles of live music stakeholders based on short telephone interviews

As set out in the report's introduction, eighteen profile interviews were carried out by the Research Associate in order to provide narrative as well as numbers for the report. In the main, interviewees were based in the snapshot census cities and we are grateful to our affiliates for their help in setting up some of the interviews. In order to be more illustrative of the UK as a whole, this report also includes excerpts of interviewees from Wales and Northern Ireland, places in which a snapshot census did not take place in 2017. The selection of profiles was dependent on the stories being told by the survey data. For example, it appears that a disproportionate number of small music venues are dealing with issues like noise complaints and property development. It was therefore decided to interview staff from small music venues in order to provide further rich detail about these issues. The focus on the smaller, ‘grassroots’ end of the spectrum was also guided by the influence of the Music Venue Trust as a project partner.

Obtaining the total spend, gross value added (GVA) and number of employees in a snapshot city

There are a range of approaches that could be taken to obtain the total spend, gross value added (GVA) and number of full-time equivalent (FTE) employees using the data collected in the surveys that were used in the current work. The amount of available data collected determines the approach taken. Below is an account of the approach taken for this report, with indications of some alternative methods where appropriate.

Using data from the snapshot census date

In the study we chose data from the snapshot census date which combined audience and venue survey data since this provided the richest source. The primary sources were thus audience interview and venue observation surveys using data associated with the snapshot census date, and multipliers derived from the venue online surveys to account for the rest of the year. If sufficient data had been available on income and expenditure from the online venue surveys then we would have used measures from the venue data to calculate the spend on food at venues, merchandise and tickets, as well as employment at venues over the year and thus derive GVA and employment. However, in the current study there was judged to be insufficient data on which to estimate these values and it was decided that the snapshot census date data provided more useful information. There are other sources that could be used to indicate ticket revenue, including box office data and data from collection agencies. However, the aim was to develop a reproducible economic methodology which would allow a local census co-ordinator to undertake their own independent data collection, without recourse to other bodies.

Factors affecting spending behaviours

Given the decision to use data collected on the snapshot census date, the question arose as to those factors that affect spending behaviour. A range of factors including genre of music, venue type and city were considered. Genre was discounted since the mean differences were not significant between genre and venue type. Partially this may have been due to the sample sizes obtained for the specific combinations. This might be addressed by gaining a larger sample, but, as will be discussed later, this might not be feasible within the constraints. If sufficient data is available then it may be possible to investigate the approach by type of venue, genre of music, other factors or a combination of these. The approach employed could cope with these extra groups.

Obtaining the average spend

Ultimately it was felt that for the three primary snapshot cities considered – Glasgow, Newcastle-Gateshead and Oxford – one should consider an overall mean spend. From the audience survey it was possible to obtain information on the spend by respondents on the snapshot census date on seven expenditure items: local transport, food/drink at the venue, food/drink external to the venue, merchandise, accommodation, ticket price and other (unspecified) spend. In cases where a respondent did not enter a value we assumed zero spend. In our case, given the skew distribution, the average was obtained by fitting an appropriate (gamma) distribution for spend greater than zero.

The average for values greater than zero obtained needed to be adjusted to account for the zeros. This was done by multiplying the average by the proportion of observations greater than zero to obtain the average for each of the seven categories. Obviously an alternative could be considered using a simple mean, but this will be affected by the high values. One could use the median, but in doing so one would again need to remove the zero values, otherwise it is likely that the median will be zero.

Seasonality of audience size and venue opening

The average audience size on the snapshot census date for a venue was obtained by compiling data from audience and venue surveys to obtain the total number of those attending. In cases where there was data for a question from one or more sources, the hierarchy of data was as follows: 1) venue online; 2) venue follow-up; 3) venue observation. The average audience attendance for each snapshot city on the snapshot census date was obtained by calculating the straightforward median across all venues. The average total spend on the snapshot census date for each of the seven categories for a venue was obtained by multiplying the average spend by the average audience size.

There was then the need to generalise to the whole year for a single venue. From the venue online survey, information was obtained on both seasonal differences in audience sizes across the year and the average frequency of opening for all venues.

Accounting for seasonality of the audience size could have again been achieved by different approaches. Musicians' experiences could be drawn on, but it was decided to use the online venue survey where values were collected for days of the week on expected audience sizes for each season. From the data on seasonal behaviour a ratio was constructed for days of the week (Sun-Weds, Thu, Fri, and Sat) and season (Jan/Feb/Mar, Apr/May/Jun, Jul/Aug/Sep, and Oct/Nov/Dec) compared to the snapshot census date, which was on a Thursday in March. This was achieved by dividing each of the values by the snapshot census date value. These ratios for each season were then used to produce a multiplier for a week in season. Multiplying this by 13 (52 weeks divided by 4) produced the season's multiplier and then summing over the seasons produced the yearly multiplier.

No data was collected on seasonality for when venues were open in the surveys. However, information about frequency of opening *was* collected. Since the goal was to estimate yearly spend then there was a need for a multiplier to reflect the average days of opening of venues. Hence it was possible to calculate for each venue the proportion of a day that they were open. For the frequency of opening, the average proportion for a venue to be open on a day was calculated from the venue surveys, which asked how frequently a venue opened (every day, 5-6 times a week, 3-4 times a week, etc.). Taking the average of this across venues gave the ratio for a day and this was used to adjust for the frequency of opening. This was then used as a multiplier.

Multiplying the average frequency of opening by the yearly multiplier by the average spend in the seven categories for a venue gave the yearly total spend for each category for a single venue. Multiplying by the number of venues in each snapshot city gave the total spend for the seven categories for a city and summing these together gave the estimated annual total spend associated with each of the three primary snapshot cities for live music.

GVA and employment

For the GVA and employment, the approach taken is as presented in UK Music's *Wish You Were Here* report methodology (UK Music 2017c), using ratios from Input-Output Tables for GVA and economic account for employment.[xxix] From the Office of National Statistics' (ONS) Annual Business Survey industrial sectors can derive a set of ratios with which it is possible to multiply total spend to derive GVA.[xxx] To obtain employment figures, we have based our calculations on the methodology employed in UK Music's *Wish You Were Here* report, which used relevant estimates of productivity by sector and region derived from

[xxix] Sectors used by UK Music to generate FTE figures are as follows: local transport = transport and storage; food/drink at the venue, food/drink external to the venue, and accommodation = accommodation & food services; merchandise and other (unspecified) spend = wholesale and retail trade; ticket price = arts, entertainment & recreation (UK Music 2017c: 12).

[xxx] Sectors (SIC codes) used by UK Music to generate GVA by sector are as follows: local transport = passenger transport (49.1; 49.3; 50.1; 50.3; 51.1); food/drink at the venue and food/drink external to the venue = food and beverage service activities (56); accommodation = accommodation (55); merchandise, ticket price, and other (unspecified) spend = retail trade, except of motor vehicles and motorcycles (47) (UK Music 2017c: 12).

data and forecasts from Oxford Economics’ regional forecasting model (UK Music 2017c: 11). We have simply employed these ratios for the regions to derive GVA and employment. Again, it would be possible to use alternative approaches from the data collected.

Calculation steps

The results are presented in Chapter 1 on the economic value of live music and in the individual city snapshots in Chapter 8. For a guide to the calculations we have provided an interactive spreadsheet in the toolkit on the project website and a step-by-step guide in the toolkit's online appendix: Data analysis and final report.[xxxi]

Some observations

Obviously on any specific night not all venues will be operating. In the current surveys it was the case that in the three primary snapshot cities no major arena or outdoor event took place. Some data was collected on arena data and outdoor events using the online survey, but it was decided to stick with using data collected specifically on the snapshot census date.

Organisationally it is difficult to ensure full coverage of every venue that is open on the snapshot census date. It was also perceived that some venues were easier to reach and would contribute to a wider range of venues being visited. One could, of course, design a multi-stage stratified sampling procedure, but it was felt that this would prove problematic due to the reliance primarily on volunteer labour.

[xxxi] http://uklivemusiccensus.org/#toolkit

Note that the figures for the UK Live Music Census only take into account the audience's direct spend. The figures reported in the Bristol Live Music Census (Bucks New University/MAP/UK Music 2016) and UK Music's *Wish You Were Here* reports (UK Music 2017b; 2017c) also factor in indirect and induced spend which makes for higher overall estimations of spend compared to the UK Live Music Census. Furthermore, our figures are based purely on survey data whereas the reports mentioned here are also based on data on the purchase of concert and festival tickets which is held by promoters, ticket agents and venues (Bucks New University/MAP/UK Music 2016: 17).

We have not included any analysis of additionality in our calculations but the point of the exercise on this occasion was to quantify the gross amount of economic activity associated with live music in these cities, not that which is economically additional (i.e. would not otherwise have occurred).

Overall, the estimates obtained gave the team confidence that the results substantiated the approach, with the view that the approach would produce a conservative estimate. Moreover, we have orientated the analysis towards smaller venues by using medians for skewed data (average audience size) rather than means.

Notes on data used in this report

See Appendix 1 for the characteristics of the sample. See the endnotes for the sample size for each finding in the report and any further explanatory notes about the dataset. Endnote references use Arabic numerals and refer to the endnotes at the end of the document; these detail statistical factors such as sample sizes. Footnote references use roman numerals and are found at the bottom of the corresponding page; these cover a broader range of definitional and explanatory points.

Note that in all surveys, not all respondents answered all of the questions posed therefore percentages in this report were only calculated on informative responses and missing values have been excluded. In some cases the n value is less than 100 therefore these findings are for illustrative and/or comparative purposes and, in the case of the snapshot city profiles, for example, to compare to UK-wide statistics; see endnotes for sample sizes and explanatory notes. In cases where a respondent did not enter a value we have assumed zero spend. Where analysis is by gender or age, those who stated ‘prefer not to say’ have been excluded from the sample but have been included for analysis which does not filter by gender or age. A quirk in the survey software – in which a negative or ‘no’ response was returned even if the respondent skipped the question – meant that it was sometimes unclear as to whether a response to a multiple choice question was intended to be a negative or that the respondent had simply not answered the question. In these instances, either only completed surveys have been analysed to ensure that the respondent at least saw the question and elected not to answer it, or the n value was calculated by whether a respondent selected at least one response within the multiple choice question. Note that although the census collected a large amount of data from the four stakeholders, not all the data collected by the census has been used in this report for the reasons noted above. Finally, all census data apart from profile interviewees has been anonymised.

Chapter 1: The economic value of live music

As the Warwick Commission asserted in its report on the future of cultural value in 2014, the Cultural and Creative Industries make a significant contribution to the British economy and are the fastest growing industry in the UK (Neelands *et al* 2015: 20; capitalisation in original).

Within this broad industry sector, live music appears to be one of the real success stories of the past decade. Live music revenue overtook recorded music revenue in the UK in 2008 (Page and Carey 2009: 2), and since 2014 UK Music has published figures in its now annual *Measuring Music* report that appear to suggest that live music is now consistently the largest generator of revenue in the UK's music industries (cf UK Music 2017a: 11-12). Research published by UK Music in 2017 stated that in the UK:

- Live music contributed £1 billion GVA to the UK's economy and sustained 28,538 jobs (UK Music 2017a: 11-12);
- 30.9 million people in total attended live music events in the UK in 2016 (18.4 million local residents and 12.5 million 'music tourists' from the UK and abroad) (UK Music 2017b: 6);
- 'Music tourists' generated £4 billion in direct and indirect spending and sustained 47,445 jobs (ibid.).

A report by consultancy firm Deloitte suggests that revenue from live performances such as concerts or the theatre reached £2.1bn last year and is expected to grow a further

7% this year, with concert-going accounting for more than half of the total revenues (Sweney 2018).

However, highlighting the challenges faced at the smaller end of the live music sector, data provided to UK Music by the Music Venue Trust suggested that direct spend by music tourists visiting smaller venues[xxxii] decreased by 13% in 2016 and that the number of visits from overseas music tourists decreased by 21% (UK Music 2017b: 14).

Total spend, GVA and employment figures for the snapshot census cities

The UK Live Music Census sought to estimate the not inconsiderable economic value of live music for the three primary snapshot cities. These are as follows:

	Glasgow	**Newcastle-Gateshead**	**Oxford**
Total annual spend	£78,800,000	£43,600,000	£10,500,000
Total Gross Value Added (GVA)	£36,500,000	£19,900,000	£4,800,000
Total Full-time Equivalent (FTE) jobs	2,450	1,620	350

Table 1: Total spend, GVA and employment figures for the snapshot census cities

Note that the figures above are based on census data and desk research into the number of venues in a city, and include live music provided for free at spaces for which live

[xxxii] Smaller venues are defined in UK Music's report as being under 1,500 capacity.

music is not necessarily the primary purpose of the business. Spaces such as pubs, churches and restaurants, for instance, are also considered as significant parts of the wider music ecology. The annual spend figures are based on information on audience spend supplied by respondents to surveys on the snapshot census date on seven expenditure items – local transport, food/drink at the venue, food/drink external to the venue, merchandise, accommodation, ticket price and other (unspecified) spend – and hence are not limited purely to direct spend associated with live music.

The UK Live Music Census also sought to understand economic value using measures beyond spend, GVA and employment figures. For example, the following section highlights how earnings for musicians and spend by audiences are now higher for live music than recorded music and how the ticketing sector has become one of the most lucrative sectors within the music industries.

Musicians

From amateurs to megastars, musicians are the hub around which live music turns and the UK Live Music Census sought to better understand the value of live music to musicians. The census asked musicians to define themselves as either professional (someone who has earned their living substantially from music for a significant proportion of their working life), semi-professional (someone who is paid as a musician but this is not necessarily how they earn their living), or amateur (not paid as a musician).

Membership organisations

There are a variety of organisations which musicians can belong to and which can provide social, financial and legal benefits. Perhaps unsurprisingly, respondents to the musician survey who identify as professional are more likely to be members of the majority of such organisations than those who identify as amateur, as the chart below shows:[1]

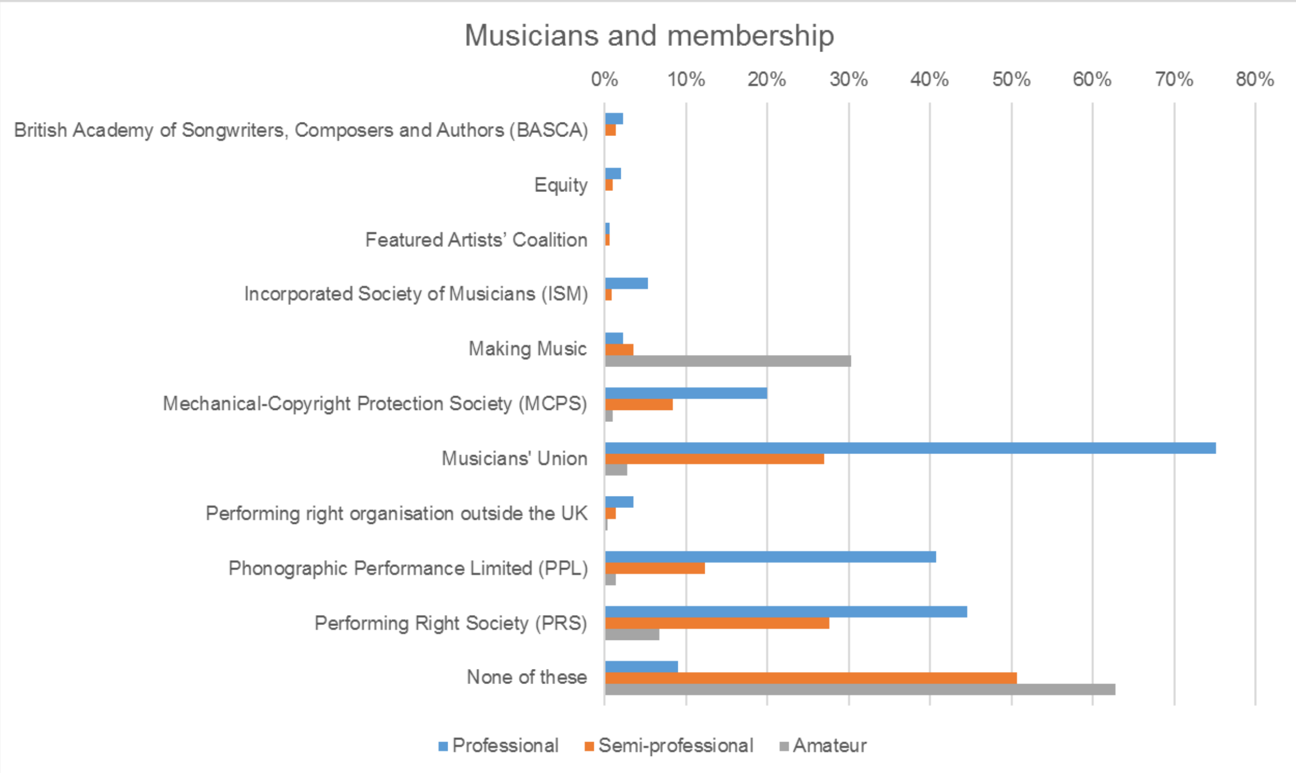

Figure 1: Musicians and membership

Earnings from live performance

First, as can be seen from the chart below, data from the census suggests that the sector is somewhat male-dominated, with males making up 68% of respondents to the musician survey who identify as professional, 81% of those who identify as semi-professional, and 55% of those who identify as amateur.[2] This echoes an analysis by *The Guardian* in October 2017 which calculated that of the 370 gigs listed for one night in October on the *Ents24* listings website, 69% of the acts were made up entirely of men, while just 9% were female-only (half of these were solo artists) (Larsson 2017b).

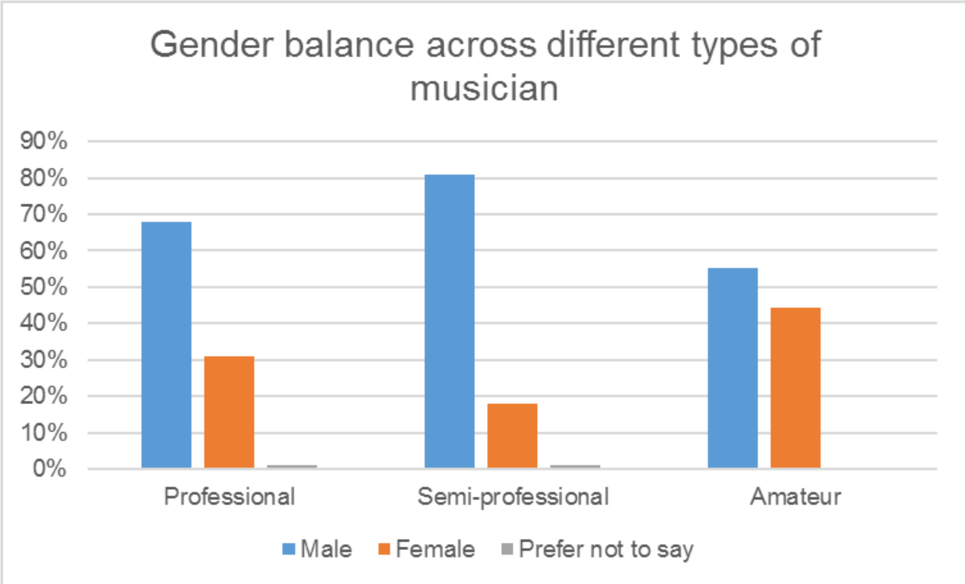

Figure 2: Gender balance across different types of musician

It also appears that there may be slight differences in pay between male and female respondents to the musician survey identifying as professional and semi-professional musicians, with male performers sometimes (but not always) tending to be paid slightly more than females. For example, as the chart below suggests, male professional or semi-professional solo singers earn more on average per gig than female solo singers (£100 compared to £85). However, female professional or semi-professional duo or ensemble players appear to earn more on average per gig than male players (£100 compared to £75), and male and female solo instrumentalists earn the same per gig (£100).[3] However, the relatively low sample size for female respondents in particular here should be noted.

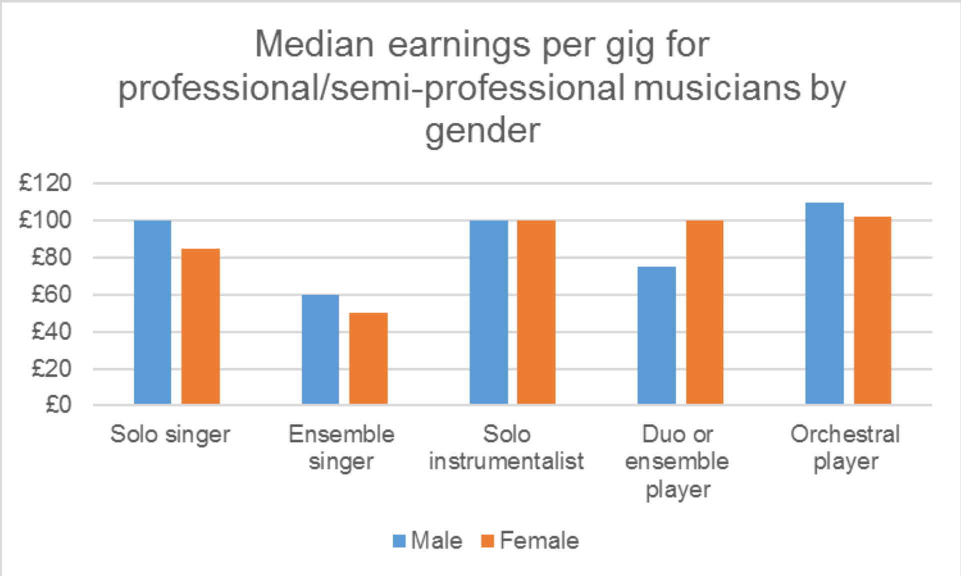

Figure 3: Median earnings per gig for professional/semi-professional respondents to the musician survey by gender

Annual income direct from live music

On average, live performance forms a key part of respondents to the musician survey's annual income – for professionals at least – significantly more so than income from recording. As the chart below suggests,[xxxiii] 49% of professional musicians' annual income comes from performing, and 3% from recording, with teaching and other music-related activity also forming a significant part of their annual income.[4] For semi-professional musicians, 23% comes from performing and 2% from recording, with 58% of annual income from other non-music-related activity,[5] while

[xxxiii] Note that this chart does not reflect the different proportions of professional, semi-professional and amateur musicians in the dataset, but instead treats them as if there were equal numbers of each group.

for amateurs, 6% of their direct annual income comes from performing and 1% from recording.[6]

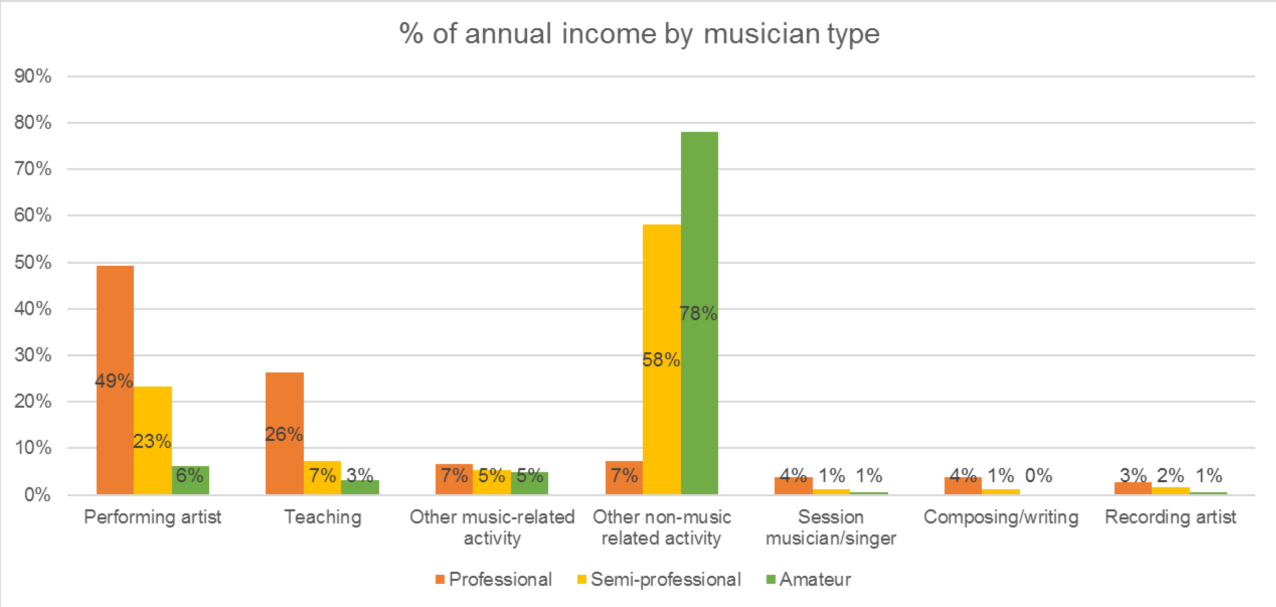

Figure 4: Percentage of annual income by type of respondent to the musician survey

However, while performing live appears to be an important part of musicians' portfolio careers, it is not necessarily lucrative for all musicians. The census suggests that 66% of those respondents to the musician survey identifying as professional musicians earn less than £15,600 direct from live music each year from, for example, fees for performing or revenue from merchandise at gigs, while the chart overleaf shows that 28% earn less than £5,200 direct from live performance.[7] Indeed, research by the Musicians' Union in 2012 found that over half (56%) of the musicians surveyed earn less than £20,000 *in total* per year (Musicians' Union 2012: 5).

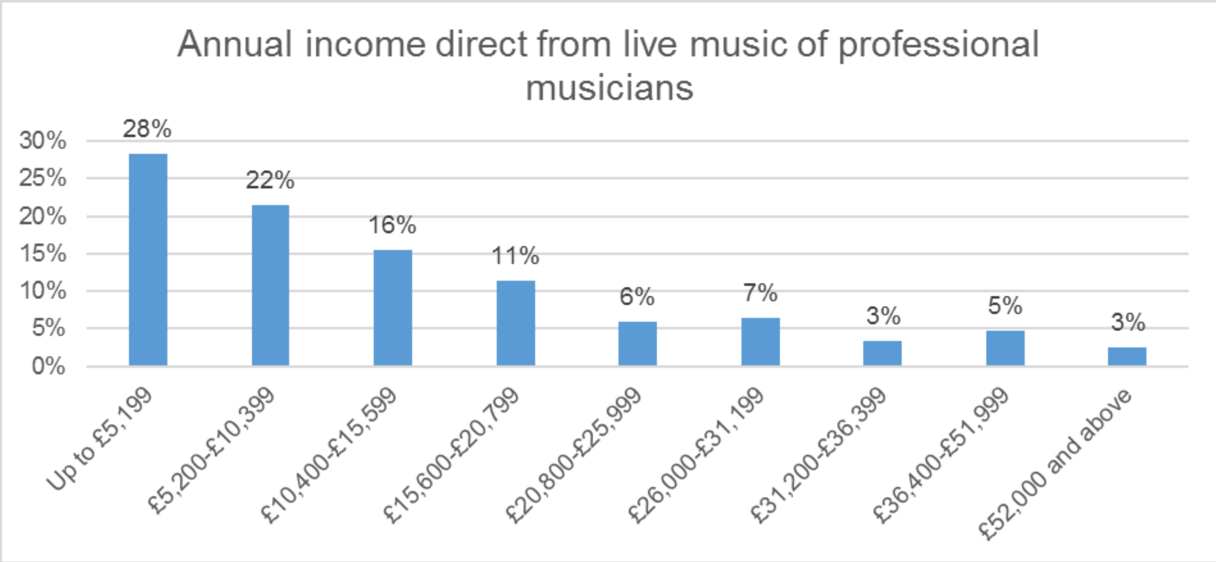

Figure 5: Annual income direct from live music of professional respondents to the musician survey

Other roles

As highlighted on the previous page, musicians' annual income may come from a variety of sources. Out of those respondents to the musician survey who play a role within the music industries other than as a musician (paid or unpaid), 40% are promoters, 26% are also production crew (e.g. live sound engineers), and 17% are also booking agents ('other' included roles such as music society committee member).[8] As will be seen later in Chapter 4 on valuing spaces for live music, some musicians spoke of particular venues being significant because they enable them to promote their own shows, forming both a source of income and the opportunity to perform and to choose with whom to perform.

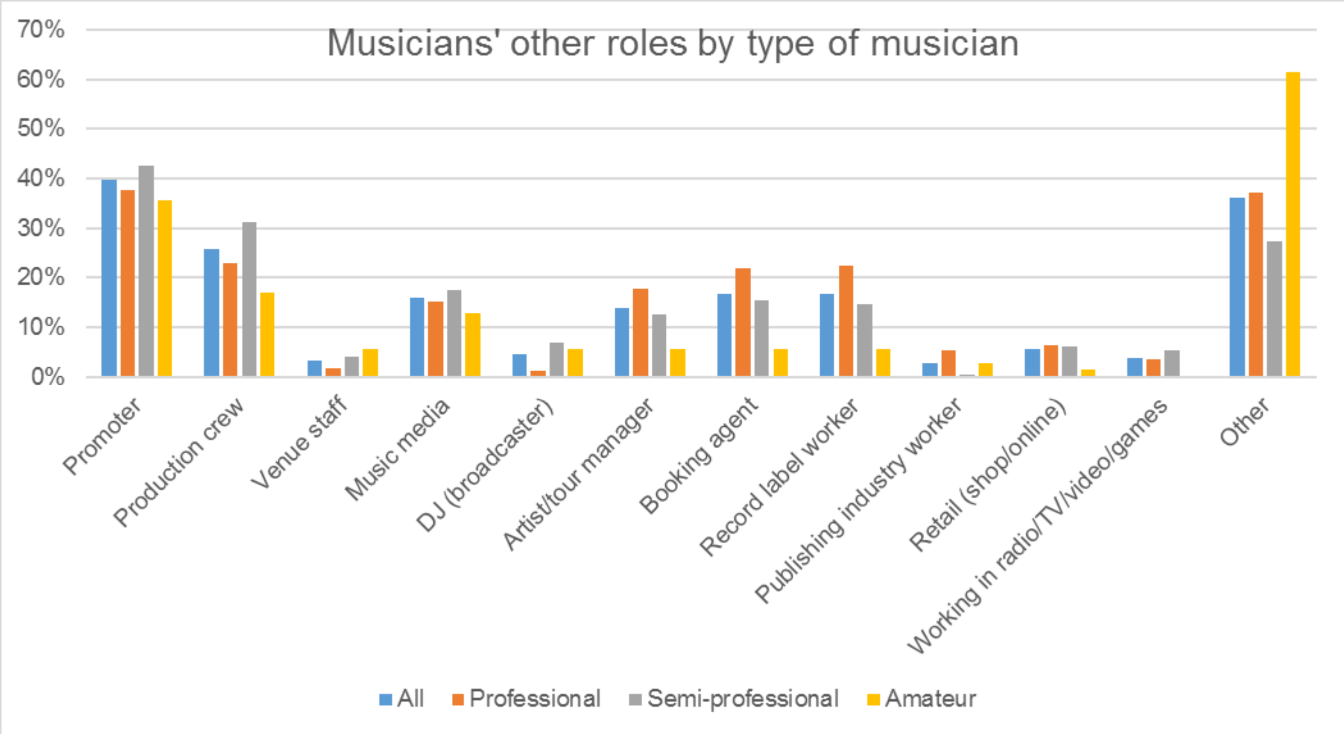

Figure 6: Musicians' other roles by type of respondent to the musician survey

The excerpt overleaf from a profile interview with a folk musician, Ian Stephenson, provides an illustrative example of how musicians' annual income often comes from multiple sources – of which live music forms just one strand – but it also supports the idea that the value of live music to musicians and audiences is not purely economic, as will be explored in the next chapter:

Profile: Ian Stephenson, Musician, North East

I am a multi-instrumentalist playing folk and traditional music of Northumbria and Scandinavia. I won the BBC Young Folk Award back in 1999 when I was 17 and I am currently the Musical Director of Sage Gateshead's Youth Folk Music Ensemble. I also have a recording studio business and probably earn more in monetary terms from the studio than from doing gigs these days, as well as a little bit of teaching and occasional guest lectures at Newcastle University.

Live and recorded music feed each other but live music is becoming more important, I think. It's easier to get more information, more performances, video content and free music online of a band but with the decline in the physical act of going and buying an album, I feel that when I see a live performance, it feels like the audience makes a much stronger connection with the band – and is more likely to become a 'superfan' – having seen a live gig. But, conversely, without the recording and the online presence then people don't tend to be able to *do* long runs of gigs or to step into the scene as a professional musician. Most people will make some money from making recordings but, as far as I'm concerned, it's only supplementary to their earnings from live concerts, rather than the other way round, where you used to earn millions from your CD and the tour was just to promote the CD. So I think things are changing. Live music is more *emotionally* important and everything else is more ubiquitous. People are going to see less live music in the folk world but when they experience it it's more unique.

Genre

As well as understanding musicians on the professional-amateur spectrum, it is also instructive to consider genre when thinking about economic value. While music genres are notoriously difficult to pin down they can be a useful way of understanding the various 'art worlds' within which musicians operate (cf Becker 1982).[xxxiv]

[xxxiv] We recognise, however, that many of the key stakeholders engaged with live music move between genres, and that, as EKOS found in their report on the music sector in Scotland, many musical activities involve collaboration

It is worth pointing out here that the census was well publicised across the BBC network and other national and local broadcasters. However, the sample was self-selecting and so some genres are under-represented; for example, rap, grime and opera. (In general, the researchers note the relatively low proportion of BAME (Black, Asian, Minority Ethnic) respondents participating in the census and recognise the need to address this in future live music censuses.)

When asked to choose only one genre with which they most identify as a performing artist, 25% of respondents to the musician survey identify most with classical music, while 20% identify most with rock music.[9]

Taking only those respondents who identify as professional musicians, the chart below shows that when asked to choose the genre with which they identify the most, 29% identify most with classical music, 14% with jazz, 11% identify with rock music, 8% identify as a singer/songwriter, and 7% identify most with pop.[10]

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between genres and/or artforms, or even the invention of new genres (EKOS 2014: 19).

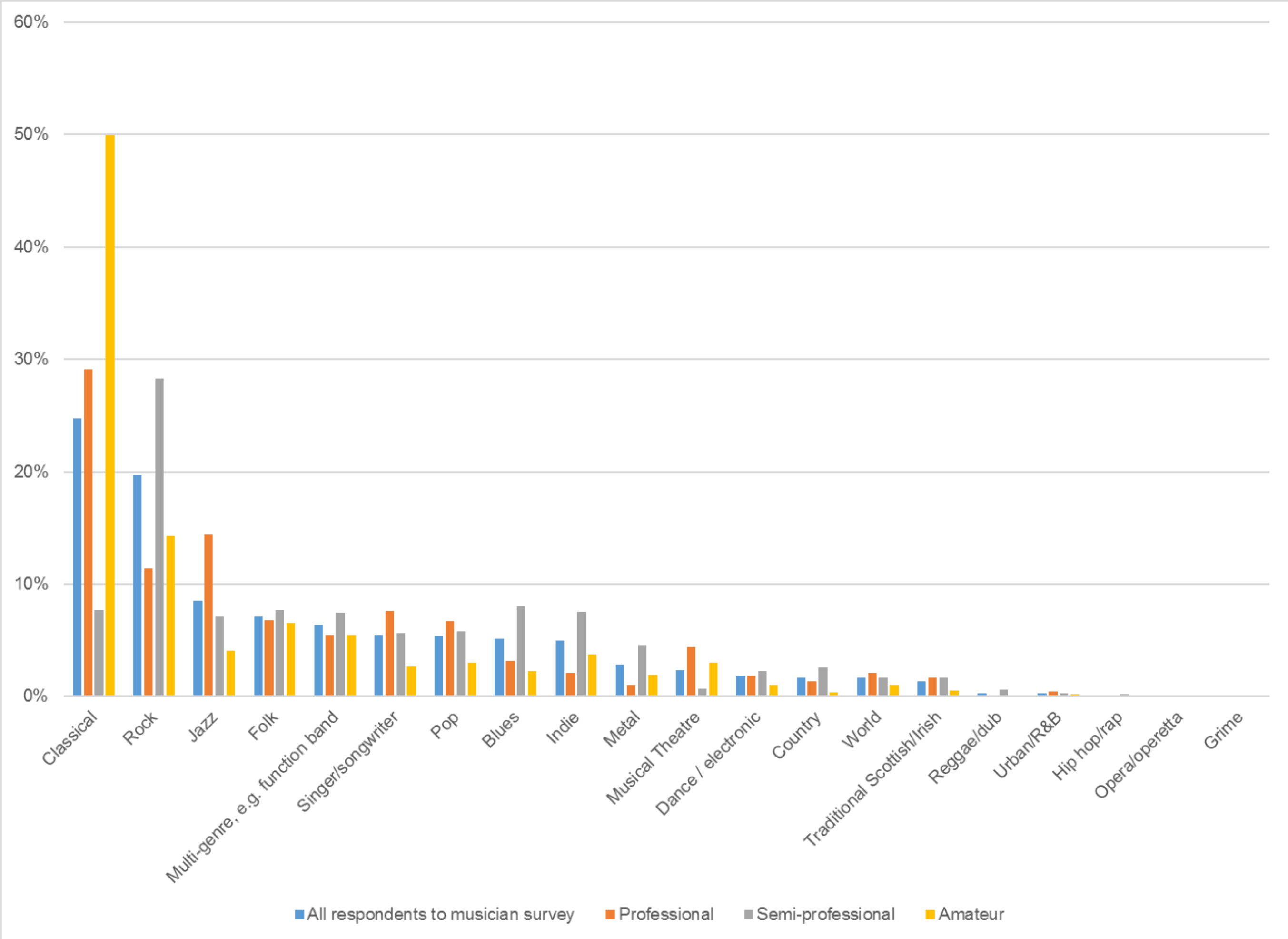

Figure 7: Genres with which respondents to the musician survey most identify

Respondents to the musician survey were then asked to select all the genres from which they earn money. The chart below shows the responses from those musicians identifying as professional and semi-professional, compared to all respondents to the musician survey (including amateur). It suggests that the four most lucrative genres for respondents to the musician survey overall are: rock, pop, blues and classical, with 40% of all respondents earning money from rock, 26% from pop, 22% from blues, and 21% from classical music.[11]

Looking at musicians by type, it appears that 38% of respondents to the musician survey identifying as professional currently earn money from classical music, 31% from pop, 31% from jazz, and 22% from blues.[12] For respondents to the musician survey identifying as semi-professional, however, the most lucrative genre is rock music: 48% earn money from rock music, while only 9% earn money from classical music.[13]

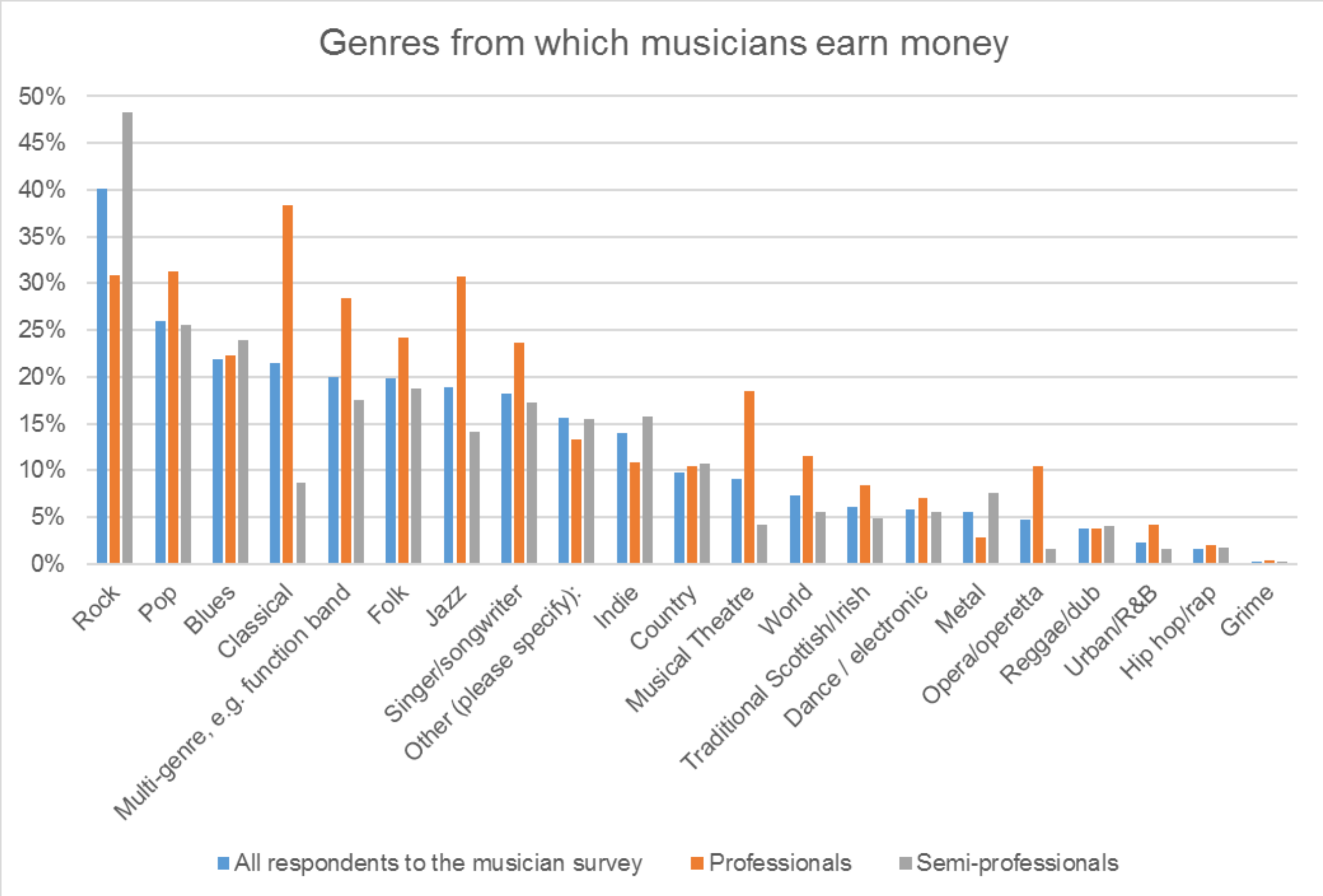

Figure 8: Genres from which respondents to the musician survey earn money

Employment status

The UK Live Music Census asked musicians about their employment status and found differences between the three types of musician identified earlier:

- 78% of respondents to the musician survey who identify as professional are self-employed;
- 42% of respondents to the musician survey who identify as semi-professional are employed full-time (although not necessarily as a musician);

- 37% of respondents to the musician survey who identify as amateur are retired.[14]

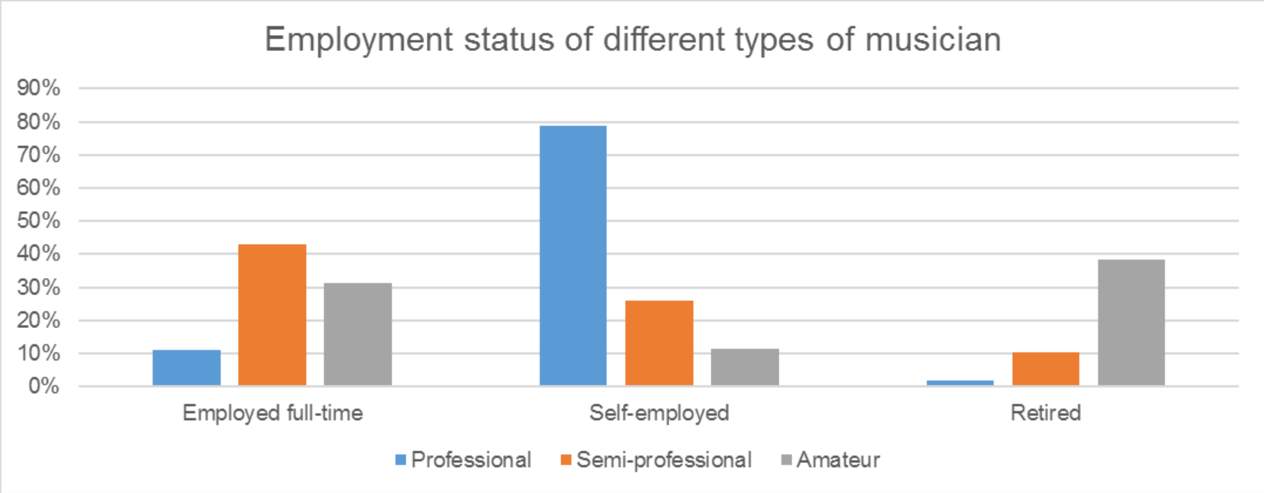

Figure 9: Employment status of different types of respondents to the musician survey

The high proportion of self-employed professional musicians here echoes research published in 2017 into musicians and mental health which also draws attention to the high number of self-employed people working in music (Gross and Musgrave 2017). The researchers highlight the need for musicians to undertake multiple concurrent projects in order to bring in a sufficient income, which can result in a lack of a healthy work-life balance and a precarious and unpredictable financial situation (Gross and Musgrave 2017: 7). Later in the report, Chapter 6 will examine some of the other barriers currently being faced by musicians.

Audiences

The previous section showed how live music is now more economically significant than recorded music for musicians. However, it is not only musicians for whom this is the case.

Spend on tickets for live music events

As the chart below illustrates, the census data suggests that spend on tickets for live music events now forms a greater proportion of consumer spend on music than recorded music: 47% of respondents to the audience survey spend more than £20 on tickets for concerts/festivals each month, while only 25% spend the same on recorded music.[15]

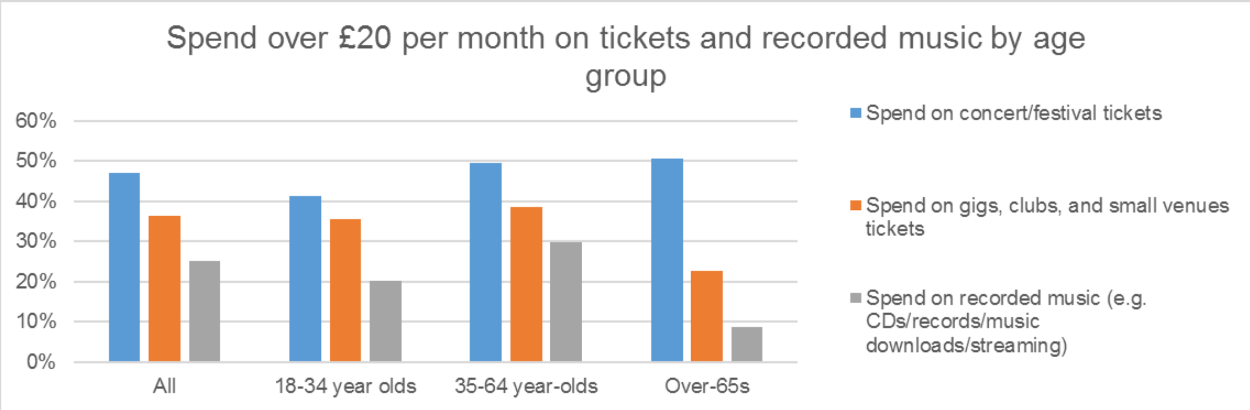

Figure 10: Audience spend over £20 per month on tickets and recorded music by age group of respondents to the audience survey

Perhaps unsurprisingly, there are generational differences in spending habits, which suggests that respondents to the audience survey aged over 35 years old spend the most on concert/festival tickets per month, and that over-65s spend the least on gigs/clubs/small venue tickets. It appears that those respondents aged 35-64 years old spend more on recorded music than both the other two age groups. Again, looked at generationally, respondents to the audience survey as a whole appear to be spending more on live music than recorded music. For example, 36% of respondents aged 18-34 years old spend more than £20 on tickets for gigs/clubs/small venues each month, while only 20% spend the same on recorded music.[16]

Festivals: audience spend and frequency of attendance

A report into the impact of festivals published in 2016 concluded that festivals are at the heart of the British music industries and are an essential part of the worlds of rock, classical, folk and jazz, forming regularly occurring pivot points around which musicians, audiences and festival organisers plan their lives (Webster and McKay 2016). The UK's music festival sector grew rapidly in the first decade of the 2000s, although the rapid growth now appears to have slowed down.

The median spend per year on music festivals by respondents to the census online audience survey is as follows:[17]

- Tickets/entry: £150;
- Food, beverages and other consumables: £100;
- Travel expenses specific to music festivals: £50.

There appear to be differences between age groups in terms of spending, most likely because the frequency of attendance is slightly different between those groups. 18-34 year-olds attend on average 1.6 festivals per year, 35-64 year-olds attend 1.4 festivals per year, and over-65s attend 1.3 festivals per year on average.[18]

- 18-34 year-olds spend twice as much as over-65s on music festival tickets (a median of £200 compared to £100); [19]
- 18-34 year-olds and 35-64 year-olds both spend twice as music as over-65s on festival food and drink (a median of £100 compared to £50).[20]

Ticket reselling

As revenue from live music has grown, so too have the ways in which to make money out of it, particularly around ticket (re)selling. Since the end of the 'noughties', the live music sector has become increasingly intertwined with the ticketing and data sector. For example, the largest entertainment company in the world, Live Nation Entertainment, owns both the largest live music promoter in the world, Live Nation Concerts, and the biggest ticketing company in the world, Ticketmaster, and boasts that it has 'more first-party data on live entertainment fans than any company on earth' (Live Nation 2017). Digital data and online ticketing is a very lucrative market for some operators but it has led to a highly complex and somewhat opaque system in which tickets are bought and sold in their millions and then resold for profit by companies such as Viagogo and GetMeIn, and which has also allowed a wave of ticket 'harvesting' by so-called 'bots'[xxxv] (Waterson 2016: 47). The UK's secondary ticketing market was valued at around £1 billion in 2016 (Waterson 2016: 119) and 2017 (IQ 2017b: 80).

In an attempt to understand more about audiences and their ticket reselling habits, the census asked respondents to the audience survey about whether they had to resell a ticket in the past 12 months. It also asked whether they had bought a ticket with the intention of reselling it for a profit and were asked to comment on reselling tickets for profit.

44% of respondents to the audience online survey were in the position of needing to resell a ticket for a live music event in the past 12 months, i.e. purchased a ticket and then found they could not attend. Of those who had to resell, 41% resold the ticket at face value and only 2% resold it for profit, as the chart below shows.[21]

[xxxv] To address the issue of bots, the Digital Economy Act 2017 made it a criminal offence for those that misuse bot technology to sweep up tickets and sell them at inflated prices in the secondary market (DCMS 2017).

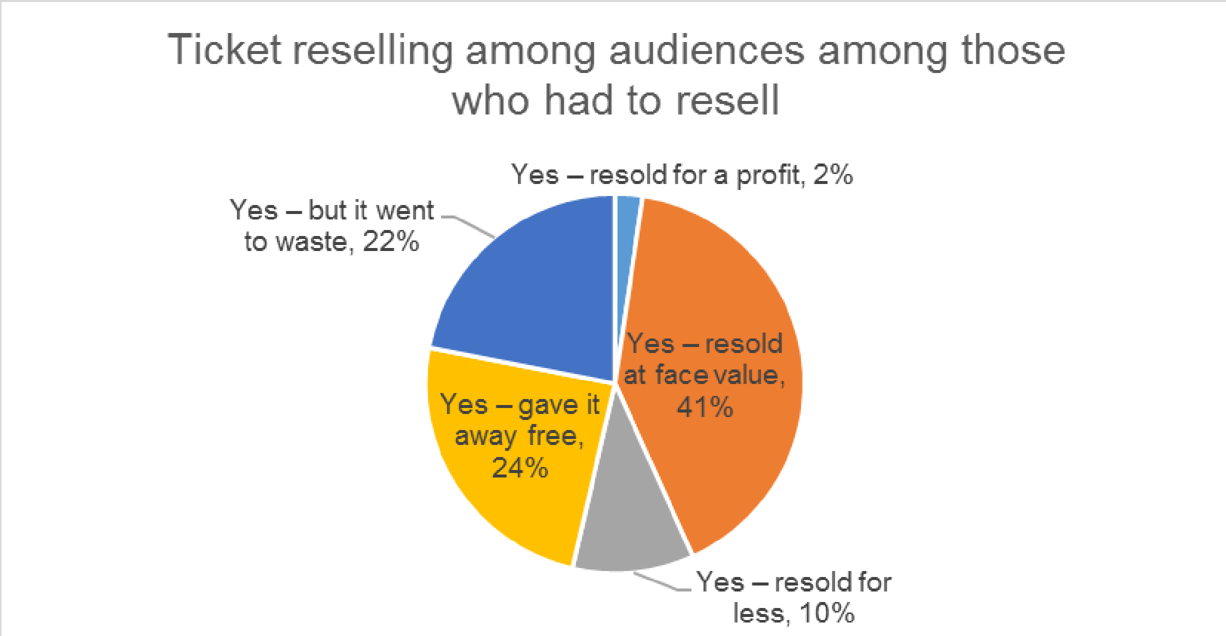

Figure 11: Ticket reselling among respondents to the audience survey who had to resell a ticket in past 12 months

In the last 12 months, only 0.4% of respondents to the audience survey said that they bought a music festival or concert ticket for the purpose of reselling it at a profit.[22]

Examples of comments included:

> *The secondary ticket market needs to be addressed with force. Capping fees is one thing, but artist managers need to stop promoting this industry by supplying tickets to this market just to ensure a sell-out.*
> Medium-sized music venue, South East, hosting/promoting live music for 5-10 years.

> *I have had to waste a ticket in the past as friends could not attend the event. If these could be returned to the point of purchase this would be far easier and would help all involved. It would mean more tickets would be available for fans from the point of purchase, and re-sale sites would not be needed.*

Audience survey, female, 30-34 years old, Yorkshire and Humber.

While these comments highlight a level of concern about secondary ticketing – and perhaps a lack of understanding of some of the complexities[xxxvi] – there are obvious practical difficulties with these suggestions. For example, while it is undeniable that demand exists for customers to be able to return unwanted tickets, there are risks for the organisers that returns will undermine total sales, because they may have other tickets unsold that are 'inferior' to those being returned (Waterson 2016: 8-9). If resale in this way is not possible then the question for audiences is therefore: who is reselling the ticket and for what purpose?

The census showed that ticket reselling was an ongoing concern for significant numbers of respondents to the audience survey and that very few bought with the specific aim of selling on. It appears that amongst some members of the public at least, selling tickets deliberately bought to resell for profit still appears to be disreputable. For example, open-ended responses from the census' audience online survey also included the words 'illegal' (9%), 'scum', and 'banned' (both 5%).[23] This supports research by FanFair into consumer attitudes to secondary ticketing published in 2017 which suggests that 80% of survey respondents believe that the 'big four' ticketing companies (GetMeIn, Seatwave, StubHub and Viagogo) are 'ripping off the fans' (FanFair 2017: 11).

[xxxvi] cf Behr and Cloonan (2018) for an overview of the policy context and characteristics of the debate around secondary ticketing and which looks beyond the market value of tickets towards ideas of cultural value which have hitherto played little part in the debate.

Recommendation 1. We *recommend* that the UK government continues to investigate secondary ticketing via the Competition and Markets Authority and that the Digital, Culture, Media and Sport Committee continue its investigations in this area.

While this chapter has shown that live music is obviously economically significant to musicians, audiences and the wider live music industries, live performance is not just an economic transaction. The UK Live Music Census sought to evaluate the social and cultural value of live music, as will be explored in the next chapter.

Chapter 2: The social and cultural value of live music

To better understand the social and cultural value of live music, the UK Live Music Census asked respondents to the audience survey: 'What do you get out of live music? What would you say are the most important (intangible) things that you take away from live music?' Hundreds of them responded, sometimes movingly and often eloquently. This qualitative data has been coded and themed and from these responses it is apparent that live music: enhances social bonding, is mood-enhancing, provides health and well-being benefits, offers a unique experience, forms a fundamental part of people's identity, is inspiring, engages all the senses, and offers the potential for transcendence.[xxxvii] The following chapter explores these themes, illustrated with some of the audience survey responses.[24]

Social bonding

Live music enhances social bonding because it allows people to spend time with friends and family and helps them to make new friends and acquaintances. For instance:

> *[I get] joy listening to music, sharing it with my children and seeing their happiness when we dance together.* Female, 35-39 years old, Northern Ireland.

[xxxvii] John Holden's work on cultural value gives an overview of some of the notions of cultural value identified in the census audience data, including historical, social, symbolic, aesthetic and spiritual value (2004: 35). The [Australian] Live Music Office's report into the economic and social value of live music in Australia contains a useful literature review of the social and cultural value of live music (Live Music Office 2014: 10-11) and a discussion of the various forms of live music capital (ibid: 34-38).

Live music events, because of the nature of shared appreciation for a particular artist, genre, venue, or type of event, can offer a sense of belonging. As the following respondent describes,

> *I feel part of something greater as I've shared something beautiful with a crowd, even if I haven't spoken to them; it makes me feel like I'm part of a community.*
> Female, 30-34 years old, Scotland.

In this way, live music underpins a shared experience, with strangers or with friends and family. As expressed many times in the audience online survey responses, live music can be the basis for coming together to have that shared experience. As writer and academic Simon Frith puts it:

> *People make music because that is what humans do. Music making has been essential to the development of human sociability and, to this day, people make music not primarily to make money but as a necessary part of everyday social activities – putting children to bed, worshipping in a church, supporting a football team, having a party, etc.*
> Frith 2013: n.p.

Mood-enhancing

Live music is mood-enhancing because it is energising, exciting, and uplifting. As this audience member explains:

> *Live music makes me feel alive. I have many good things to live for i.e. family and friends but music is my constant companion.*
> Female, 50-54 years old, South East.

A live music event can provide an emotional connection to the artist, the audience and the music. At its most basic, live music events can give pleasure by offering entertainment or a good night out but, as the following examples illustrate, can sometimes elicit even stronger emotions:

> *There's a buzz, an energy, a feeling that's hard to describe when you see a band perform music you like. It's a mix of excitement and joy, sometimes almost approaching rapture.* Male, 35-39 years old, North East.
>
> *Music soothes the soul. It is more than entertainment, it is a communication and therapy, emotion and transcendence.*
> Female, 55-59 years old, Wales.

Health and well-being

As the above quote also demonstrates, live music provides health and well-being benefits because it both allows for relaxation and offers an opportunity for escapism beyond the day-to-day. For an extensive range of resources around the ways that creative activity can benefit the health and wellbeing of individuals and communities, see the National Alliance for Arts Health and Wellbeing's website.[xxxviii] In the case of live music, as one respondent puts it:

> *Nothing else fills my consciousness so much and takes me so completely outside of my everyday thoughts and experiences to make me realise how trivial they really are.*
> Male, 35-39 years old, East of England.

[xxxviii] http://www.artshealthandwellbeing.org.uk/

A unique experience

Many of the respondents commented on the difference between the live music and the recorded music experience, often to say that the former is somehow 'better' than the latter. For some, this is because of the uniqueness of the experience, because unlike with recorded music, the performance is different each time. The uniqueness of the performance also means that in an increasingly mediated world, the experience is authentic; it cannot be repeated (cf Auslander 1999; Holt 2010; Cloonan 2012). Part of the reason for this sense of unrepeatable authenticity is because the performer-audience interaction is a fundamental part of the experience. The live music event allows audiences to inhabit the same physical space as the artist, sometimes even to meet them in person. For example:

> *The interaction between performer(s) and audience is particularly important – just throwaway jokes sparked by some minor incident that make you feel you have shared something, the unrehearsed.*
> Female, 35-39 years old, South East.

In this way, the live music event creates distinct and significant memories, both individual and collective. As one respondent explains:

> *A [live event gives a] sense of being there, where historical events are occurring. A live event will only ever happen once, it is unique. It is important to be present. Watching a video of a music event is just not the same.*
> Male, 50-54 years old, South East.

Identity-forming

As the above quote shows, live music becomes part of people's life stories. Attending live music events can become a fundamental part of people's identity because it can become a regular activity to which people afford great significance. While perhaps not a 'typical' response, the following quote demonstrates how for some people live music plays a central role in their lives:

> *Live music is as essential to me as eating, drinking, breathing and sex! I feel depressed and bored if I don't attend live gigs regularly. It is part of me.*
> Male, 45-49 years old, South East.

Note also that this quote suggests a distinct well-being effect from live music in that a *lack* of live music has a direct negative impact on the respondent's mental health.

Inspiring

Live music can be inspiring for both audiences and artists alike because it stimulates the discovery of new music and genres and can spark people's own creativity. For some respondents, live music events give an opportunity for the appreciation of performers' talents, an opportunity to see favourite artists 'in the flesh', and can give a deeper understanding of the music. As the following suggests:

> *It's often only when you see a band live that you can really appreciate what a song is about (sometimes because words that are not clear in a recorded version are suddenly clear; sometimes because the singer/writer actually takes time to explain the meaning or inspiration behind a song). The personality of a band is also only apparent when you see them live, and live versions of songs are often immeasurably superior to their recorded*

versions (or you see a song played in a new way, which helps it to 'live').
Male, 40-44 years old, South East.

A sensory experience

A live music event can engage all the senses and it can allow for outward physical participation (e.g. singing along, moving to the music, applause) and can induce physical sensations caused by features of the live event (e.g. loud volume, lighting effects) (cf Behr *et al* 2016b: 411). For instance:

> *I love singing and dancing to live music, and interacting with the artist and other fans. And also seeing the effect their music has on other people in the crowd.*
> Female, 25-29 years old, South West.

Potential for transcendence

In our work on audiences at Edinburgh's Queen's Hall, we found that despite ascribing value to different aspects of live music, all the research participants spoke of an experience that, 'at its best, is in some way transcendent', *no matter what genre*:

> *This might entail 'losing oneself', an overpowering experience of being in a crowd, reinforcing bonds with fellow audience members or immersion in the musical aesthetic. While the concert/gig does not need to attain this 'transcendence' to have value, it is the potential for that which keeps people going back – whether live music attendance is part of the fabric of their regular activities … or a special occasion.*
> Behr *et al* 2016b: 411.

Echoing this finding, some respondents to the UK Live Music Census' online audience survey spoke of being able to 'lose themselves' in the music, or even that live music can be a spiritual experience. The final example in this chapter illustrates how live music for some people is more than just the sum of its parts:

> *Music is a profoundly spiritual comfort. Sometimes the performances can be disappointing, but it's rare. Most of the time, the experience is uplifting, sometimes it becomes transcendent. While music can be made to this level, there is hope for humanity, and we learn to cope better with the atrocities that are heaped upon us every day.*
> Female, 50-54 years old, Scotland.

From the above assertions, then, we can see live music's potential to be socially and culturally valuable in a variety of ways, both intrinsically and instrumentally (and, frequently, both).[xxxix] Such value may not necessarily be easily quantifiable but, particularly with matters like health and well-being, there are clear benefits for its participants and for society more widely.

As highlighted by the final quote above, however, performances can sometimes be disappointing and so it is perhaps the *potential* for the desired experience that keeps people going back. As one respondent wrote: 'It varies from

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[xxxix] Although difficult to neatly define (cf Holden 2004), the intrinsic value of culture includes those impacts which are associated with benefits to the individual (like happiness or inspiration) whereas instrumental value includes those benefits in which culture makes a contribution to wider policy areas (such as supporting economic growth, health and education) (Carnwath and Brown 2014: 2).

artist to artist. Sometimes it's just a good night out but other times it can be an enlightening and enriching experience' (Male, 55-59 years old, East of England).

As well as the artist's performance, then, factors such as the venue, the occasion, and the mood of the attendee can all have a bearing on the audience experience. The influence of the venue on this experience and the ways in which venues are valued by audiences (and musicians) will be explored in Chapter 4. Chapter 3 will now explore some additional ways of evaluating the social and cultural value of live music in relation to its key stakeholders.

Chapter 3: More than just music

As well as the coded and themed data summarised on the previous pages, the census also collected data on the social and cultural value of live music and its key stakeholders (musicians, audiences, venues and promoters).

Not just a music venue

The online venue survey asked respondents about their activities beyond purely putting on live music. It shows that for 85% of respondents to the venue survey, programming and presenting (live) music is not the only function of the organisation.[25]

Respondents to the venue online survey were asked about additional activities they undertook as well as live music:[26]

- 51% operate a bar or restaurant outside concert hours;
- 39% offer social and education activities such as community work and courses;
- 22% offer tools and space for musicians such as rehearsal spaces and recording studios.[xl]

[xl] It is worth noting that UK Music supports a number of rehearsal spaces in urban and rural areas across the UK via the UK Music Rehearsal Space Project (UK Music 2018). Each space provides instruments and equipment for young people to use and play with for free or for minimal cost.

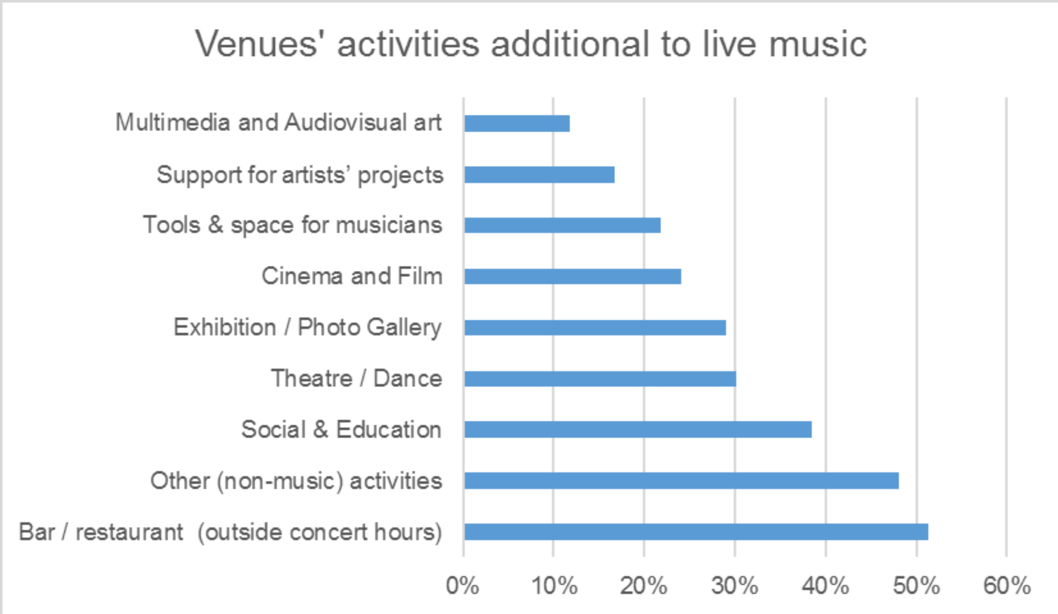

Figure 12: Activities additional to live music of respondents to the venue survey

Hosting live music allows buildings to diversify their offer, as highlighted by the following excerpt from a profile interview with the Music Officer for a charity which puts on classical, jazz, world, rock and pop music in a city centre church in Leeds:

Samuel Moore, Music Officer, Arts@Trinity, Leeds

The Holy Trinity Church is the second oldest building in Leeds and is owned by the City Parish. Arts@Trinity is a separate charity in its own right and we pay a modest amount of money to use the space. A lot of the events held at the church are now arts events but the church still holds church services, particularly on Sundays, but the majority of the time that the church is open, it is open for arts events. Arts@Trinity has meant that the usage of the building has increased, brought in extra revenue, and it allows people to see what a wonderful building it is, so it is an important partnership. In general, unless you are a cathedral or your church has significant historical significance and hence attracts tourists, it can be difficult for churches to operate because of the large operating costs. Non-cathedral churches therefore often have to offer a different model to stay open. This can be via outreach or charity work, or by hosting weddings or vintage fairs, or by building an arts programme; there often needs to be different layers beyond just being a church. Churches have had to diversify and to think innovatively about how to use the space, or have to have a large team of volunteers to keep things going. Many churches have core congregations who support all their in house arts events but Arts@Trinity is slightly different in that we have an audience for the arts events who don't necessarily attend for worship, and vice versa. That being said, we have a very good working partnership with the church and the worshipping congregation who also use the building. The two things run contiguously and the two pillars support each other and make it work.

As well as adding cultural value to the venue itself, live music can also add social and cultural value more widely. The chart below[27] shows the activities of venues which could be said to add cultural value both to the venue itself and to its locale.[xli]

[xli] Venues can, of course, impact on the wider creative and cultural ecology. For example, a report on the impact of cultural and sporting investment suggests that Sage Gateshead, which was completed in 2004, has had an impact on the number of creative and cultural businesses in the area, with an 86% increase in Gateshead between 1999 and 2009 and a 60% increase in Newcastle (CASE 2011: 76).

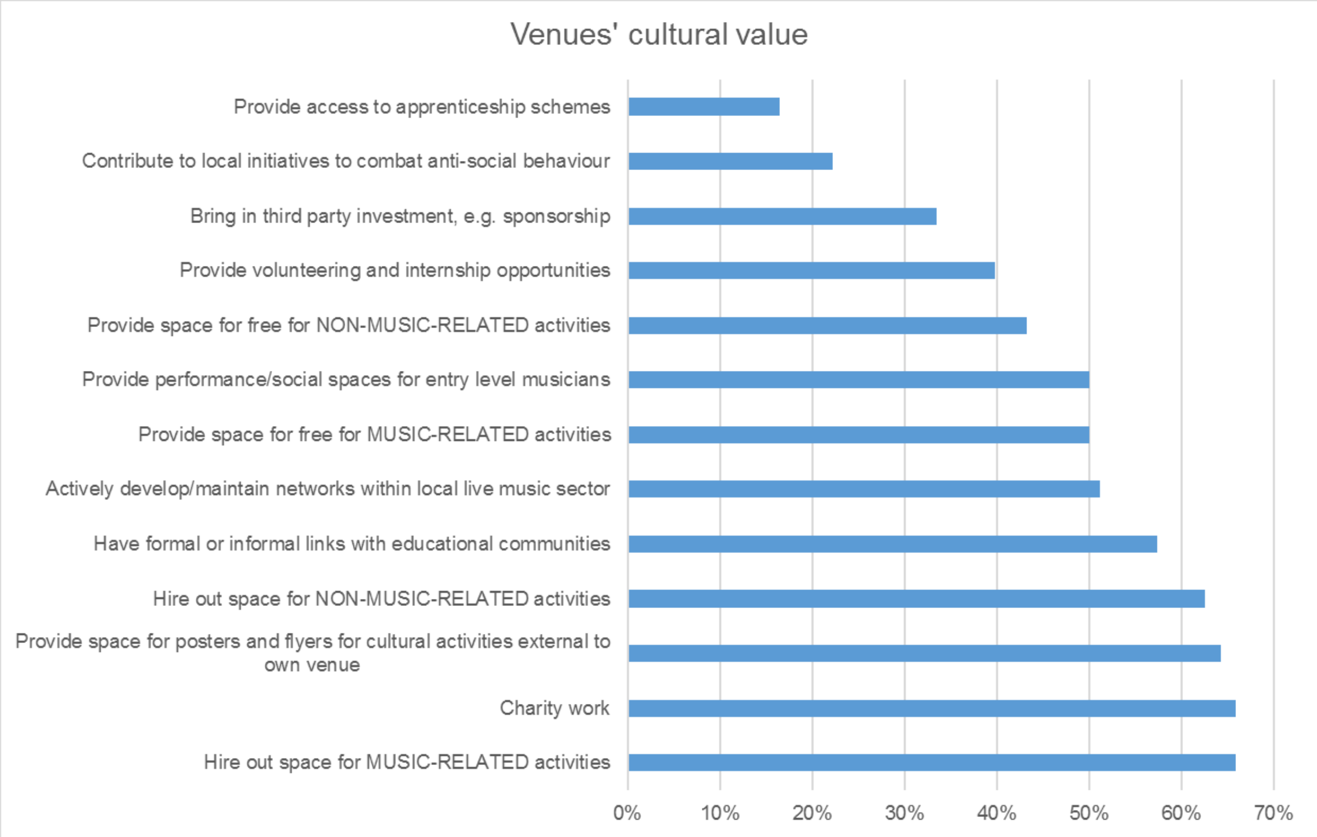

Figure 13: Cultural value of respondents to the venue survey

It is interesting to note that as many respondents to the venue survey hire out their space for music-related activities (66%) as do charity work, more of which below. Another noteworthy feature of the chart above is that 64% of respondents to the venue survey provide space for advertising material for cultural activities outside their own venue. In this way, such spaces also form an important role in the live music ecology by acting as a hub for information about the wider cultural ecology.

Similarly, over half (51%) of the respondents to the venue online survey said that they actively develop/maintain networks within the local live music sector. This, again, helps to foster a healthy live music ecology by keeping open the lines of communication between venues, promoters and other stakeholders.

Volunteering and charity work

The census asked questions to all four key stakeholders about volunteering and charity work. As the chart above shows, two-thirds (66%) of respondents to the online venue survey said that they do (unspecified) charity work.[xlii] While it might be expected that a high proportion of venues which receive public or charitable funds would do charity work (84%), it is striking that a relatively high proportion of those who do *not* receive funding *also* do charity work (62%).[28]

Of course it is not only venues which undertake charity or voluntary work, but also musicians and promoters. The census data suggests that 48% of respondents to the promoter survey do charity work.[29] By analysing open-ended responses to the question about why musicians had worked unpaid in the past 12 months, it also found that 45% of professional musicians who worked unpaid in the past 12 months and gave a reason for doing so were performing as part of a charity/benefit/community event or as a volunteer.[30]

As well as those earning a living from live music, the sector relies on an army of people undertaking important voluntary and charity work. 29% of respondents to the audience online survey indicated that they had volunteered within the live music sector over the past 12 months.[31] The median amount of time spent volunteering within the live music

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[xlii] Unfortunately there was insufficient detail within the responses to be able to ascertain the exact nature of the charity work in question. 'Charity work' is multi-levelled and may consist of different levels of activity and engagement. For example, venues may actively raise money for charities, provide free venue hire to charities, or simply allow charities to leave collection boxes in the venue.

sector over the past 12 months by those respondents to the audience online survey who volunteer was 30 hours.[32] Out of those who volunteer, the most often cited reasons for volunteering were: helping out friends and family or because the volunteer got free tickets in return for their time (both 38%) or because they had spare time to volunteer (37%).[33]

The following excerpt from a profile interview with the founder of Musicians Against Homelessness highlights the ongoing value of the unpaid work by volunteers within the sector as well as highlighting some of the challenges for emerging artists, as will be explored in Chapter 6.

Profile: Emma Rule, Founder, Musicians Against Homelessness (speaking in October 2017)

I started volunteering at homeless charity Crisis about four or five years ago, while at the same time I was starting to work with young bands, giving guidance and advice on how to promote themselves … Live music venues are closing, which is affecting bands having a place to play, or venues offer 'pay-to-play', which is all a bit of a sad state of affairs. Bands can end up so out of pocket ... I had this idea that there was a way for bands to find gigs and to get PR that could be done with a social conscience and raise money for charity at the same time ... I thought that we needed a patron that knows the music business well and is well respected, so I got in contact with Creation label boss, Alan McGee, who got it straight away, and so Musicians Against Homelessness was born.

The first year we put on about 120 gigs and small festivals with about 560 bands playing in community centres, churches, pubs, venues, you name it ... In 2016 we raised around £45K and this year we're expecting close to £100K as a rolling total. It's all done via social media and the money goes directly to Crisis in England, Scotland and Wales and Simon Community in Northern Ireland. No money goes to MAH and nobody takes a salary. Every single person who helps organise the gigs is a volunteer; pretty much everyone has a day job … The bands play for free, although some event managers do help out with travel costs and riders, etc. Many of the venues we use give us the space for free, but some have a small charge – which comes out of ticket sales – and often have sound engineer costs.

The biggest hurdles we face are not having any money. It's cost *me* money, in fact. Trying to function without any resources, just me and a laptop and post-it notes stuck to my head, is hard. The workload is immense at times, particularly when we are all trying to juggle workload and family. I'm so committed to it, though, so I put a huge amount of pressure on myself to deliver what we've said we'll deliver. It's more than a full-time job. For five or six months of the year I am often working all hours of the day. In 2016 I was working nights as a full-time carer so that I could do this during the day ... I'm so pleased about the exposure for the homelessness cause. It makes it all worth it, knowing that something is happening.

Education

As Figure 13 on the cultural value of respondents to the venue survey on a previous page also shows, live music venues can play an educational role in audiences' and musicians' musical development. Furthermore, 57% of respondents to the online venue survey said that they have formal or informal links with educational communities such as universities and colleges and 40% provide volunteering and internship opportunities.[34] As both sites for training and developing the next generation of live music workers and as sites of research into cultural activities, formal and informal links between venues and educational communities can be valuable both in the short-term and the long-term.

Venues may of course organise their own educational activities. The following interview with the manager of a music pub in Gateshead which puts on live music 3-4 times a week illustrates the way in which such activities can have longer-term impacts on local communities:

> *I think the venue has made the area more tolerant. Locals see diverse crowds, ethnic musicians and lots of gentle people at the venue and have responded by acting more responsibly. We run five local music festivals each year and we invite the local Asian and Kurdish community, which is sometimes the only non-white faces that the locals see. In the summer holidays, we offer free guitar and drum workshops to the local youth so that they can play loud and get really stuck in. We have a 'no tracksuit, no baseball cap, no swearing' rule which helps to change the behaviour of anyone who wants to come in as they have to behave more responsibly when they're in here. In fact, I've seen people I've thought would turn out to be no-hopers in baseball caps turn out well because they have become regulars at the venue. We've become the longest-running and most loved live music pub in the area and local shopkeepers have said that the area is unrecognisable from when we started 16 years ago.*
> Paul Smith, Manager, The Three Tuns, Gateshead.

It is not just venues who facilitate educational activities, of course. The census showed that 50% of respondents to the promoter survey also have informal links with educational communities.[35] The following quote is from a respondent to the promoter survey which illustrates how promoters can provide informal opportunities for young musicians to perform to an audience as well as opportunities for young people to attend live music events:

> *Our audience is predominantly elderly, although because we always offer free tickets to those in full time education, we attract a small number of children and young adults. Before concerts we always have young students playing as the audience comes in, this has proved a very popular item, audiences arrive early so that they can enjoy some extra music before the main concert. It is also proving popular with the young musicians, giving them an opportunity to perform in front of an audience in a concert setting.*
>
> Local promoter, Scotland, promoting for more than 30 years.

The following excerpt from a profile interview with a promoter of contemporary music further demonstrates how promoters add cultural value to their locale through education and outreach work:

Profile: Victoria Larkin, Deputy Director, Oxford Contemporary Music

We try to work with and support emerging and established Oxford-based artists as well as artists from across the country. For example, we've worked with graduates and lecturers at Oxford Brookes University (OBU) as well as co-promoting the OBU Sonic Art Research Unit's annual audiograft Festival. We recently commissioned Ray Lee, a professor at OBU, to create 'Ring Out', which took eight enormous bell-like structures to squares, car parks and city streets in places like Hull, Oxford and London, everyday spaces that people could just stumble across. In this way, we reached far more people than if it had just stayed in a concert hall. While OCM is not just about Oxford any more, our outreach and education work is still mostly based in Oxford … [and] I think that that grassroots access to music-making is something that has had a sustained benefit to the city.

It is worth noting that the measures of social and cultural value set out on the previous pages are not restricted to particular genres of music or venue types. Rather, they cover a wide variety of different genres and types of performance, from small venues right up to large-scale concert halls.

Participation

As well as asking respondents to the audience surveys about the live music events they attend, the census also asked about live music-related activities in which they had participated in the past 12 months.[xliii] As the chart below shows, out of those respondents *who had indicated that they had taken part in at least one activity in the past 12 months*, 43% had played a musical instrument and/or sung

[xliii] See also (currently unpublished) work by Paul Rutter at Southampton Solent University exploring the range of ways people are regularly involved in local music-making (Rutter 2017).

to an audience, while 35% had written music and 26% had taken part in karaoke.[36] Opportunities to participate in live music activities also add cultural value to an area and, as explored below, can encourage migration.

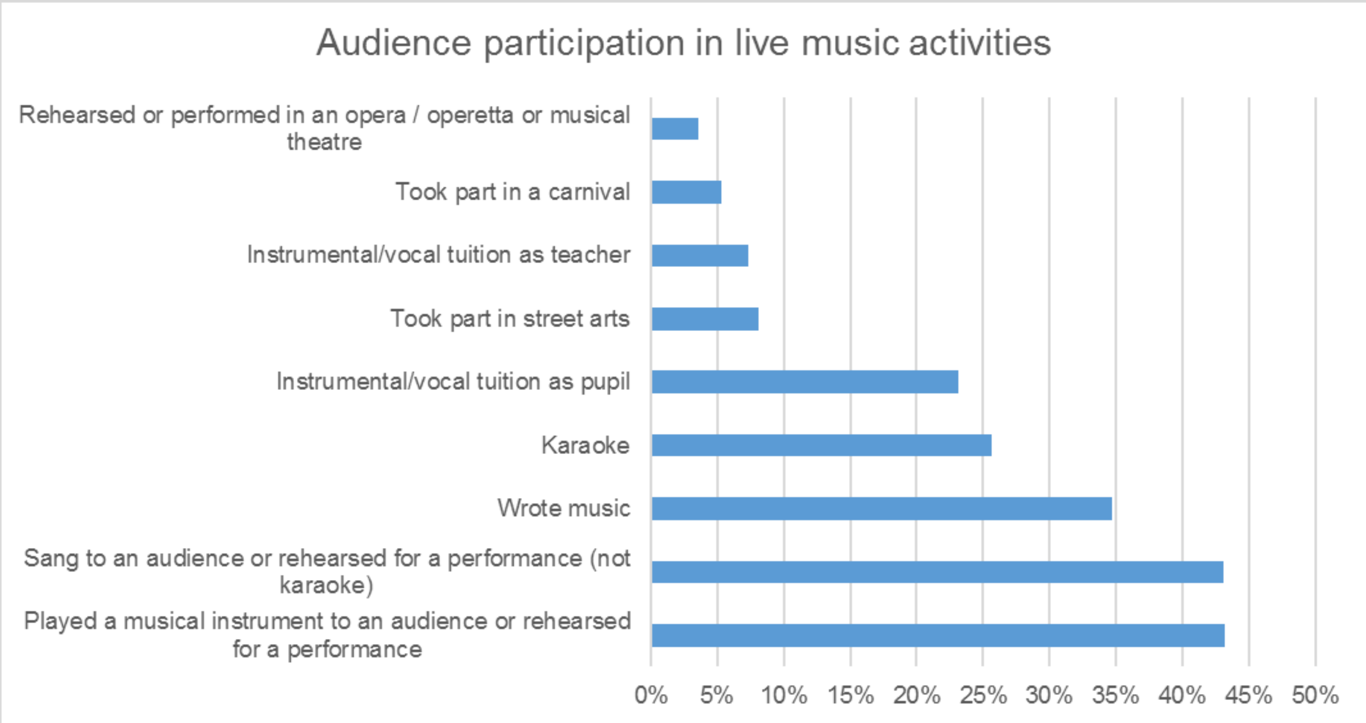


Figure 14: Participation in live music activities of those respondents to the audience survey who had indicated that they had taken part in at least one activity in the past 12 months

A catalyst for travel

As well as the cultural activities discussed above, the census also examined the role of live music and live music venues as a catalyst for travel. For example, live music has to happen at a particular time and in a particular place and so can be a driver of 'music tourism'. [xliv]

> *The main reason I usually visit other cities and towns is for gigs. Gig trips in the UK and abroad are a great way to get to know other cities and see a side to them others don't.*
> Audience survey, male, 35-39 years old, North West.

To better understand live music's catalytic role, the census asked audiences and musicians about the distances travelled to attend and perform:[37]

- The median distance travelled by audiences who took part in the (city-based) snapshot censuses on the snapshot census date was 6 miles (round trip); 28% travelled 20 miles or more;[38]
- The median distance travelled by respondents to the audience online survey for the last event that they attended (not on the snapshot census date) was 20 miles (round trip). 52% travelled 20 miles or more.[39]

It is not just audiences who travel, of course. Rehearsals and performances also see musicians travelling considerable distances. The median distance travelled each month to perform live music by those respondents to the musician survey who self-identify as professional is 300

[xliv] Cf UK Music's *Wish You Were Here* reports which demonstrate the economic value of 'music tourism' (UK Music 2017b).

miles, by semi-professionals is 80 miles, and by amateurs is 20 miles.[40] Working musicians (mid-career) travel the furthest per month at 160 miles compared to emerging musicians, who at 40 miles per month, travel the least.[41] However, note that many respondents to the musician survey pointed out the difficulty of providing an estimate of average distance travelled per month because of variability in the locations of their engagements and the additional factor of whether rehearsals should be counted within the monthly total.

One of the most striking findings of the UK Live Music Census is that nearly one in five (18%) of all respondents to the musician survey moved to their current permanent place of residence specifically for more music opportunities.[42] For professional musicians this figure rises to nearly a third (31%), as the chart below shows:[43]

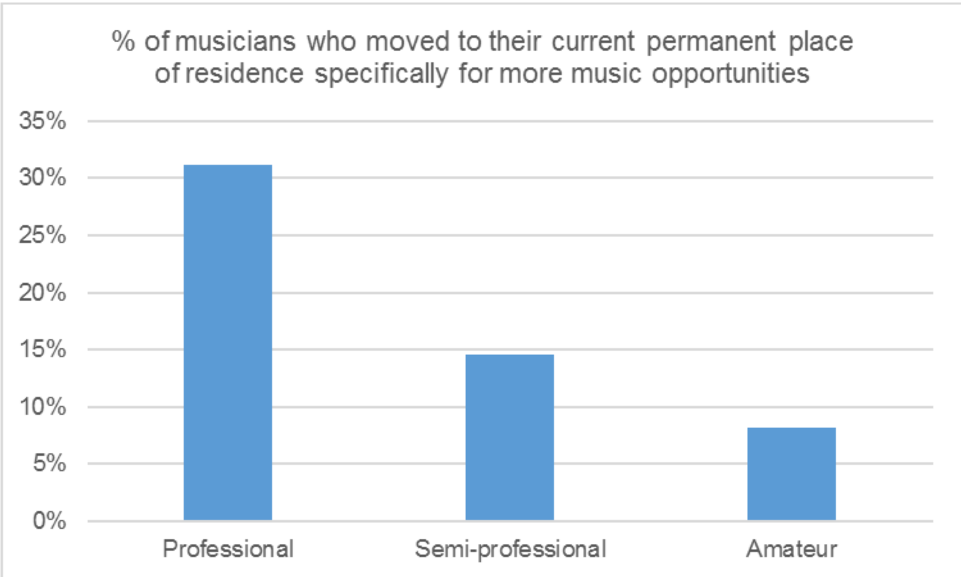


Figure 15: Percentage of respondents to the musician survey who moved to their current permanent place of residence specifically for more music opportunities

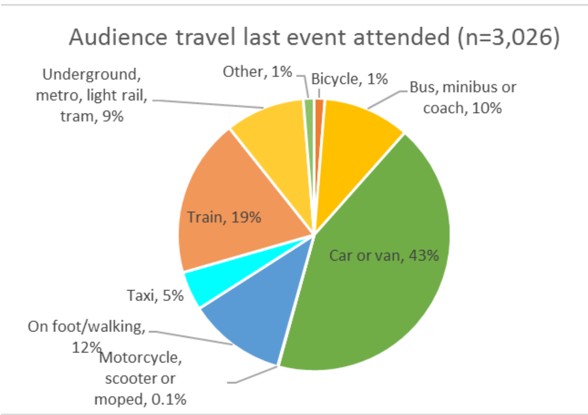
As these figures show, live music can indeed be a catalyst for travel and this movement of people can have both economic and cultural benefits. In this way, live music is a not insignificant driver of migration into a locale and, as highlighted in reports like IFPI and MusicCanada's on music cities (2015: 13), can form part of a locale's cultural offer to potential workers and also to potential students and other migrants.

Environmental sustainability

Musicians by necessity do not travel light, however. Given the necessity of having to transport instruments and equipment, it is noticeable that 40% of all respondents to the musician survey cited insufficient late night public transportation as having had an extreme, strong or moderate impact on their live music events in the past 12 months.[44] It is therefore perhaps unsurprising that 81% of all respondents to the musician survey use a car or van as the main form of transport to travel to live music events at which they are performing.[45]

Staying on the theme of transport, respondents to the audience online survey were asked to select at most three types of transport that they generally used to travel to live music events over the last 12 months. 69% travelled by car or van, 53% by train, and 33% by foot.[46] It is notable that differences exist across the different snapshot cities; for example, 18% of respondents in Oxford travel by bicycle[47] compared to 6% of all respondents.

The charts below show the main form of transport used by audiences on the snapshot census date and for the last event they attended, again highlighting the relative dominance of car travel.[48]



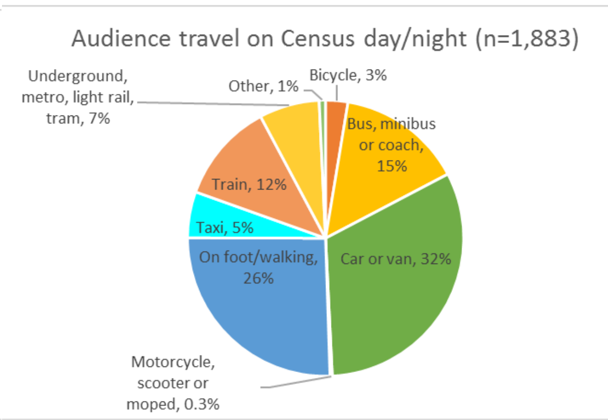


Figure 16: Main form of transport used by respondents to the audience survey on the snapshot census date

Figure 17: Main form of transport used by respondents to the audience survey for the last live music event attended

One cannot consider audience and musician travel without also considering the undeniably large carbon footprint of both. Audience travel in particular constitutes a major part of the live music sector's carbon footprint. For example, a report from 2008 estimated that audience travel emits 231,000 tonnes of CO_2 per year, constituting 43% of the entire greenhouse gas emission of the UK's recorded and live music industries (albeit an indirect emission source and not the exclusive responsibility of the music industries) (Julie's Bicycle 2008: 6). A report in 2015 found that travel typically constitutes around 80% of a festival's total known CO_2 emissions, excluding travel by artists, services or crew (Powerful Thinking 2015: 2).

Musicians tour the world, audiences travel to venues, food and drink is consumed. Live music therefore has a significant carbon footprint. To attempt to address issues around the sustainability of the music industries, Julie's Bicycle was set up in 2006 to provide resources and research to organisations in the sector – particularly venues – in order to try to cut carbon emissions and energy use across the sector. Venues and promoters – some with the assistance of Julie's Bicycle – have their part to play.

However, while progress is being made, it is clear from this chart of respondents to the venue survey's sustainability initiatives that more work needs to be done.[49] For example, as can be seen, 61% of respondents to the online venue survey do not have an up-to-date environmental policy.[50]

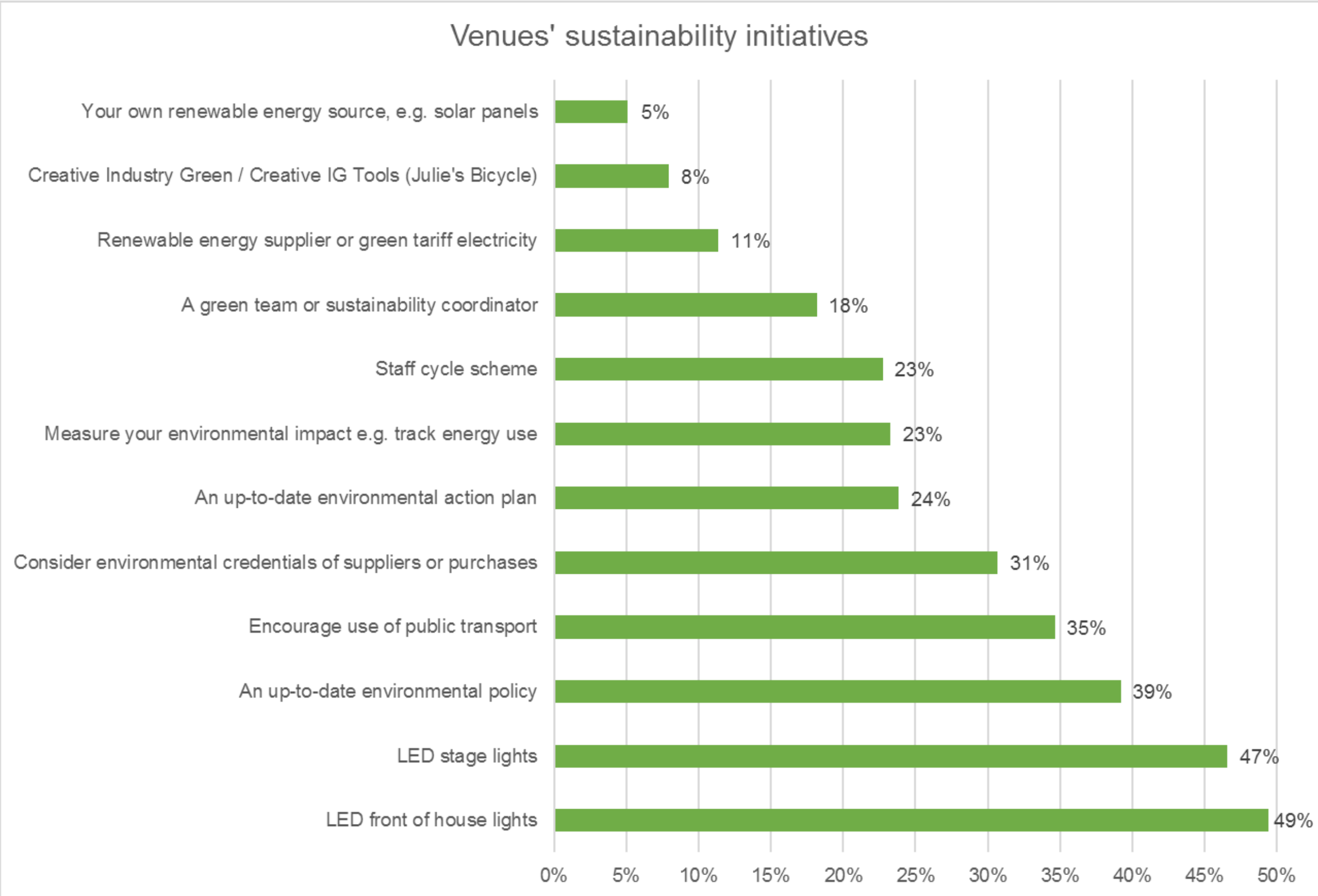


Figure 18: Sustainability initiatives of respondents to the venue survey

Furthermore, as can be seen in the chart below, while a majority of respondents to the promoter survey consider environmental sustainability as being extremely, very or somewhat relevant, over a third (35%) think that environmental sustainability is not at all or not very relevant to their organisation.[51]

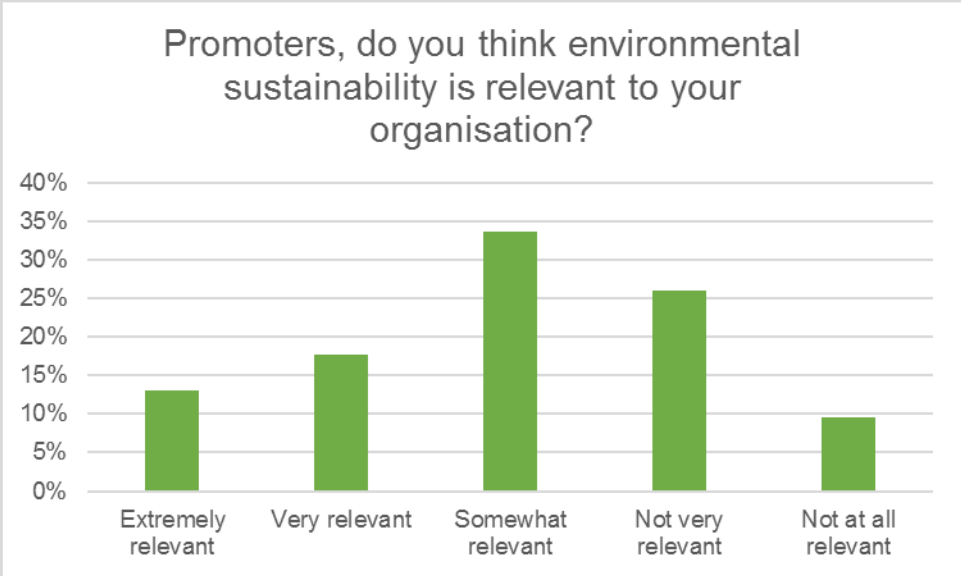


Figure 19: Views on environmental sustainability by respondents to the promoter survey

However, measures to increase environmental sustainability do not need to be expensive and can even end up saving money. The example below is an excerpt from a profile interview with a promoter in rural Scotland who puts on local and international artists. For him and his small team, a sustainable ethos appears to have brought economic and cultural benefits:

Profile: Michael Farrell, Promoter, Letham Nights, Fife

Letham is a small village in Fife with a population of about 150. About nine years ago, me and my brother- and sister-in-law started talking about how to make better use of our beautiful village hall. We wanted to extend the range of events from things like coffee mornings, whist drives, and ceilidhs to something a bit different. Our wee team of organisers spent our teenage years in the 1970s listening to John Peel and going to live gigs in small venues. It was said about John Peel that he gave people what they didn't know they wanted. In this spirit, we were convinced that if we offered something different in our fantastic village hall, we could draw in a new audience and surprise people. At the same time we would be bringing high quality entertainment to our own doorstep as well as helping the hall to flourish and providing a stage for local talent. But in reality we had no idea it would take off the way it did.

We put on nine gigs in the first year, which was really tough from an organisational point of view. … We all have full-time jobs so this is all entirely voluntary. I'm a deputy head teacher in a secondary school and while I would love to do this full-time, I know I couldn't make it worth financially. So now we do six every year – and yet we get contacted almost every week by musicians wanting to play.

As well as being committed to the music, we're all committed to environmental sustainability. The village hall wasn't very energy efficient when we first started, and our aim was to combine our love of music with the ambition of creating a zero-carbon hall … The secretary of the village hall is a great fundraiser and we support him by sending in letters of support when he applies for funding for a new boiler or for new windows … These incremental changes have already changed the efficiency of the hall, and made it cheaper to run ... At the gigs themselves, most of the audience are fairly local which reduces our carbon footprint, we use LED lights, recycle all bottles, the bar promotes local produce and, when we introduce the musicians, we encourage the audience to use public transport where possible. The musicians talk about it as well, so it becomes a ‘thing’ that people recognise. The gigs become educational in that sense and we try to promote no cost and low cost sustainability measures. Lots of musicians and our audiences are definitely attracted by our ethos.

Accessibility for Deaf and disabled customers

As well as environmental sustainability, another issue about which the live music sector needs to be proactive is accessibility for Deaf[xlv] and disabled customers. As shown by the UK Live Music Census, 6% of respondents to the audience online survey reported that they have access requirements that need to be met in order to attend live music events.[52] On a positive note, 90% of respondents to the promoter survey see accessibility as an essential or desirable factor when booking venues in that they try to ensure that all their shows take place in venues with step-free access and an accessible toilet.[53] However, 47% of respondents to the online venue survey or their staff have not received Disability Awareness training while 86% of respondents to the promoter survey have not had training.[54] Only 7% of respondents to the promoter survey have a policy to provide PA (personal assistant for Deaf and disabled customers) tickets as standard.[55]

[xlv] Deaf a with capital D is a sociological term referring to those individuals who are medically deaf or hard of hearing who identify with and participate in the culture, society, and language of Deaf people, which is based on Sign language (Canadian Association of the Deaf 2017).

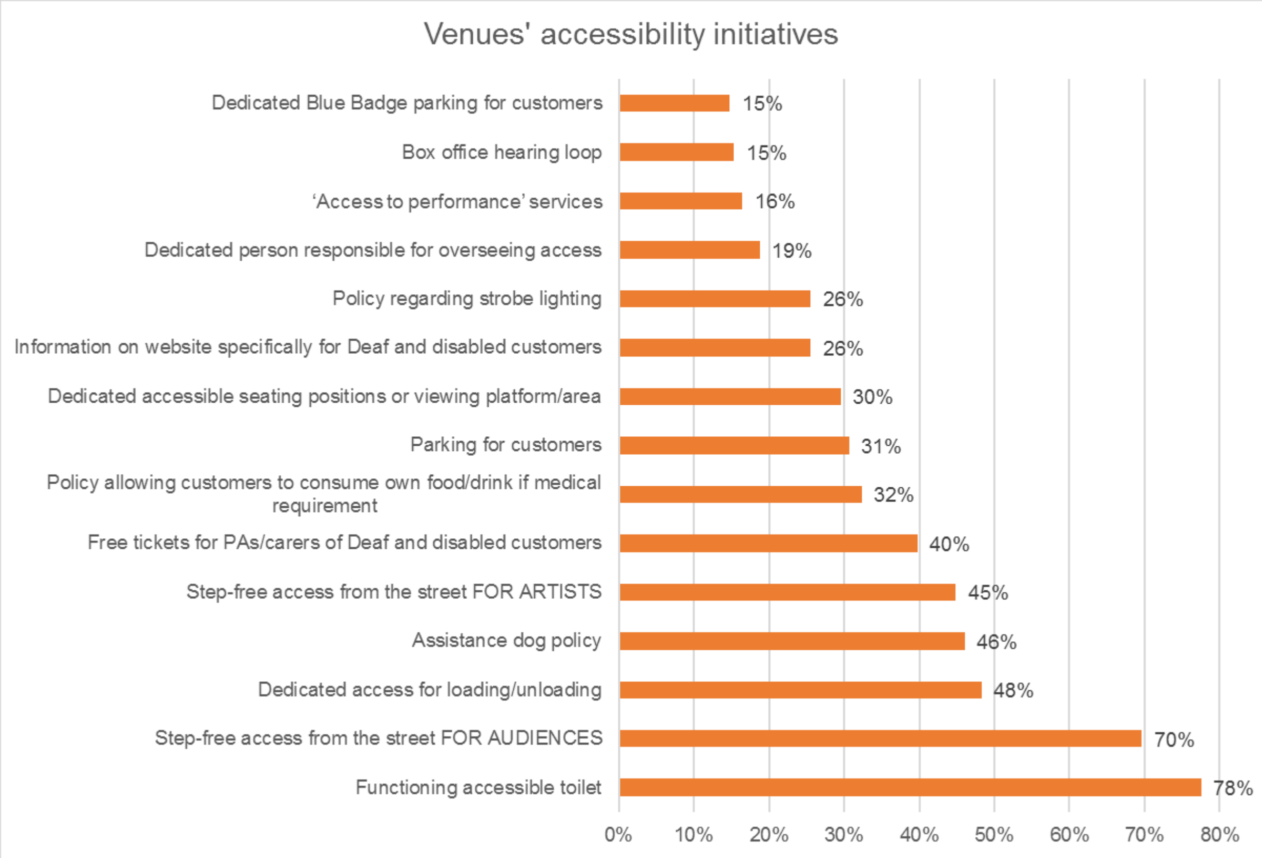


Figure 20: Accessibility initiatives of respondents to the venue survey

The chart above shows respondents to the venue survey's accessibility initiatives,[56] which highlights that there is still more to be done around accessibility for Deaf and disabled customers. For example, only 26% provide information on their website specifically for Deaf and disabled customers. This echoes research published in 2016 by Attitude is Everything, the charity set up to improve Deaf and disabled people's access to live music, which found that a third of venue and festival websites provided no access information and that less than a fifth provided information rated as 'good' (Attitude is Everything 2016: 4).[xlvi]

[xlvi] Note that different methodologies were used in both cases therefore the census findings and Attitude is Everything's findings cannot be directly compared.

The following excerpt from a profile interview with the organiser of a festival shows how accessibility initiatives need not be expensive:

Profile: Alistair McDonald, Founder/Organiser, Chase Park Festival, Gateshead

Chase Park Festival is the North East's festival for everyone and is one of the UK's most inclusive … We are really proud that 10% of our audience identify as disabled. When you're on site it can feel like there's a lot of wheelchairs around but, while it seems like there's a lot of disabled people at the festival, 10% is actually representative of the UK's disabled population as a whole. The fact that the number of disabled people on site feels unusual just shows how much they are usually missing from events like festivals … Venues and festivals shouldn't be frightened of accessibility; it isn't a headache and it needn't be expensive. It's about opening up music to music lovers who otherwise struggle to get access but it's also about getting more bums on seats and people through the door. I can't imagine a life without music; can you?

I'll give just a few examples of things we do to make the festival more accessible [most of which are no cost or low cost]. Provide really good information about all aspects of the event. People can get anxious about things like where the toilets will be in relation to the stage, or where the car parks will be, or where the disabled camping is in relation to the exits, and this means that they might not buy a ticket. It's essential, then, to provide information so that people know what to expect when they go to the event … Accessible toilets should take into account people with more complex disabilities. For example, people with incontinence need a place where they can change with dignity and some customers may need extra space for carers and support workers … Choose partners and companies who understand access issues so that staff can cater for the needs of people with disabilities … Price is important: your event should be affordable for people with disabilities. Where possible, carers and support workers should get in free and we recommend that there should be a decent discount for those who self-identify as disabled.

With the above points in mind, we make the following recommendations to venues and promoters, particularly at the smaller end of the spectrum:

Recommendation 2. We *recommend* that venues and promoters, particularly at the smaller end of the live music sector, develop policies to incorporate no-cost and low-cost initiatives for environmental sustainability and accessibility for Deaf and disabled customers, and work with organisations like Julie's Bicycle and Attitude is Everything to do so.

Another issue is diversity within the sector. For instance, research by UK Music in 2016 showed that in the music industries in general, women are slightly underrepresented in comparison with the UK population as a whole (49.3% to 50.7%) (UK Music 2017e). The survey also found BAME (Black, Asian, minority ethnic) representation in the workforce is 15.6%, which is higher than the figure for the UK population as a whole (12.8%) (ibid.). Future live music censuses should address these issues in more depth by including questions on diversity in the venue and promoter surveys. To this end, we make the following recommendation:

Recommendation 3. We *recommend* further research into issues around diversity for venue staff and promoters.

The above has illustrated some of the ways in which live music fits within society more broadly and how it contributes to the cultural value of a locale. At the heart of this are the spaces for live music. Put simply, without a space in which to perform, live music events cannot happen. Chapter 4 will now examine the social and cultural value of these spaces.

Chapter 4: Valuing spaces for live music

In the UK Live Music Census' online surveys, audiences and musicians were asked to name a venue which has been particularly significant to them and to say *why* it has been significant. This illustrative word cloud[xlvii] of the venues named by respondents to the audience survey shows that they are valued from across the whole spectrum of venue types and sizes, from London's Brixton Academy to Leeds' Brudenell Social Club and from the Royal Albert Hall to Glasgow's Barrowland Ballroom.[57]

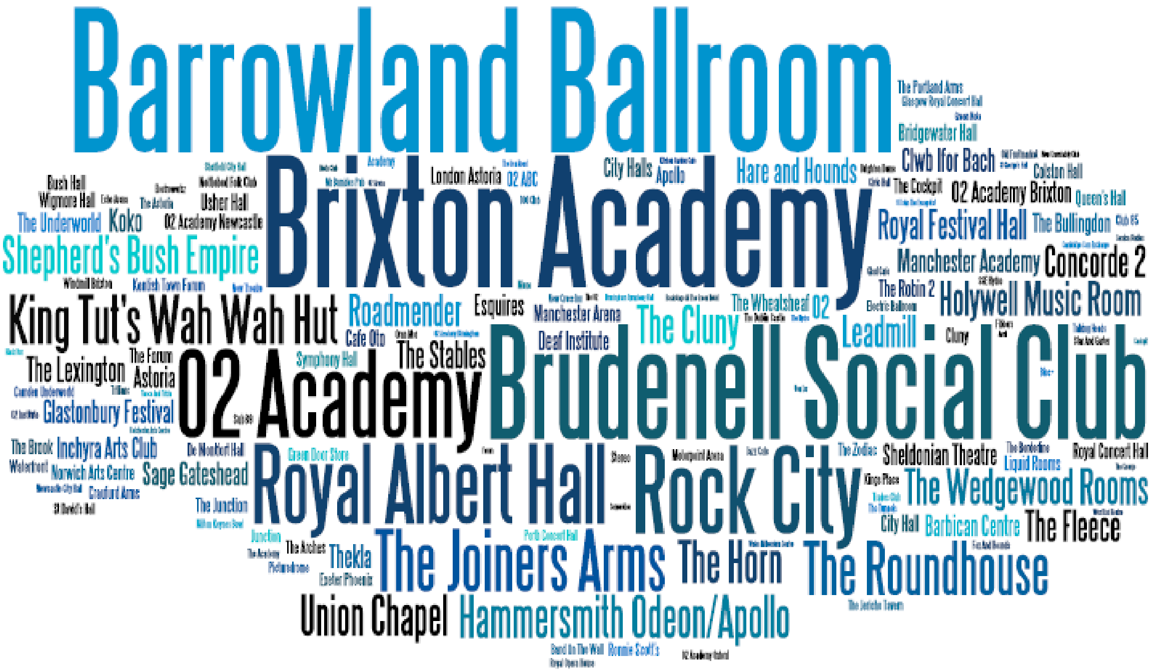


Figure 21: Significant venues named by respondents to the audience survey

Below is a word cloud of the significant venues identified by respondents to the musician online survey as having been

[xlvii] The size of the word in the word cloud indicates its frequency within the survey responses but the colours used are arbitrary. Note that there may be some skew towards venues in the snapshot cities. Word clouds were created using free wordle.net software

particularly significant to their musical career.[58] As can be seen, many of the venues identified by musicians are at the smaller end of the scale, such as The Horn in St Albans, Glasgow's King Tut's Wah Wah Hut and Edinburgh's Jazz Bar. One venue which appears a number of times in the musician survey – and to a lesser extent in the audience survey – is the Royal Albert Hall in London. The venue is a major concert hall in a major world city, associated with 'high art' and the establishment but also playing host to many popular music artists over the years, including Pink Floyd and Eric Clapton.

Figure 22: Significant venues named by respondents to the musician survey

As well as naming significant venues, audiences and musicians were asked to say *why* the venues have been significant to them. By coding and theming their qualitative responses, it is apparent that venues are valued which have symbolic, narrative, social, aesthetic and material value, and are valued for their role in musical development and their accessibility (and sometimes their scarcity), as will now be explored.[59] Note that these categories are not mutually exclusive and that emphases in the quotes are the respondents' own (unless otherwise specified).

Symbolic value

Venues may have particular symbolic value which helps to enhance a musician's career, usually as a result of the history or reputation of a venue. For example, comments from the following two musicians highlight the Royal Albert Hall's significance as a venue of national and international significance:

> *I have always dreamed of playing [at the Royal Albert Hall] and did so in 2007.*
> Male professional singer/songwriter, 45-49 years old, South East.

> *[The Royal Albert Hall] was the gig that changed my career and led to the incredible opportunities that have evolved ever since.*
> Male blues professional harmonica player, 40-44 years old.

In this way, performing at a venue may be something to which to aspire and can become a shorthand for conferring status upon the musician. For example, for one respondent, another concert hall in London is where, 'All aspiring classical performers play there and it helps a lot for the CV' (Female professional classical pianist, Yorkshire and Humber, 45-49 years old).

The venue as the site where the musician performed with or supported higher status artists is another signifier of moving up the career ladder. This applies across venue types, and even venue sizes. As the following respondent puts it:

> *[The venue is] regularly named as the UK's best small venue. A big step and honour to support several well known touring acts, to then host our own night as headline [act] was pivotal in gaining great press and exposure.*
> Male semi-professional rock drummer, 40-44 years old, Scotland.

Performing on the same stage as ‘the greats’ also has important symbolic value. Summing up their experience in just a few words, one musician’s chosen venue is significant because when they performed there it was:

> *Exciting, Dark, Smelly, Packed, lots of graffiti in the green room, Radiohead, Ride, My band!*
> Male semi-professional rock drummer, 45-49 years old, East of England.

For audience members as well, particular venues have iconic status because of the artists who have performed there or the reputation of the venue, which thus enhances their own experience. Indeed, some respondents to the online musician and audience surveys mentioned that their chosen venue is regarded by some as the ‘best in the UK’ or even the ‘best in the world’. This indicates an awareness of how the cultural value of a venue is not just locally appreciated but can play a part in place-making and in the history and heritage of a local area, a theme also addressed by Behr *et al* in their work on the cultural value of venues (2014: 7).

Narrative value

Closely linked to symbolic value is narrative value, the first theme under this heading being the temporal relationship between respondents and their named venue. For example, a number of respondents in both surveys commented that they have been attending or performing in their chosen venue for a long time, in some cases for decades, and thus the venue had been a constant and long-standing presence in their lives.[xlviii] It is noticeable that a sense of ownership or belonging comes through in some of the responses, with a number of respondents – particularly musicians – using the word 'home' to describe their chosen venue.

A common thread among respondents to both surveys is that venues are sites in which people construct and negotiate meaning. The venue is often the site of particular – usually positive – memories, often of seeing favourite artists but also because of particularly memorable events or periods of their life. For example, for one audience survey respondent:

> *I had the best times with the best of friends at a time when my home life was in disarray (my dad had a brain*

[xlviii] It is worth pointing out that one of the significant differences between festivals and live music venues is this sense of temporality or permanence, in that festivals by their nature are temporally transient, whereas live music venues are – often but not always – permanent year-round spaces and hence allow for a constancy of temporal engagement in a different way to festivals. However, some festivals take place in live music venues rather than greenspaces, thereby offering a different facet of temporal and spatial engagement.

> *tumour). [The venue] represented a release, feeling young again and reassured me I still 'belonged' in the scene.*
> Audience survey, female, 25-29 years old, North West.

Venues may also be the site of particularly memorable experiences, especially if the participant perceives that the experience is likely to be ‘once-in-a-lifetime’. For example, for this musician, their chosen venue is significant because a particular event was a unique, probably unrepeatable, experience:

> *Led singing for 80,000 live and millions on TV at a Mass here with Pope Benedict XVI in 2010.*
> Multi-genre professional female vocalist, 40-44 years old, South East.

For musicians in particular, narrative value also includes ‘milestone’ events, namely the first time that something new happened, such as their first gig, the first time they got paid as a performer, or the first time they performed at a particular type of event or venue, thus marking a shift in status or opportunity. Venues have also been significant as the location for the formation of a new ensemble, or the site in which the new grouping developed or the musicians ‘became’ a group.

Narrative value can also be extrinsic to the music. Venues can be the place where a respondent marked a particular anniversary, for instance, or met a significant person such as a friend, wife or boyfriend.

Another aspect of narrative value is frequency of attendance or performance at the venue. For musicians, this regular or long-standing relationship with a venue – employer – also has obvious economic value. Indeed, perhaps the most common reason given by respondents to the musician survey for why a venue is significant was around the theme of regularity of work or income, or that the venue has been instrumental in generating further work.

[It is worth noting that the median interval of the length of time that all respondents to the venue survey have been continuously promoting or hosting live music is 10-20 years[60] and that over half (52%) have been open for more than 10 years. The frequency of live music is also of interest here with nearly three-quarters (72%) of respondents to the venue survey hosting live music at least once or twice a week.[61]]

Social value

As well as cultural value, the social value of venues is another key theme in the data, and this chimes in particular with Chapter 2 on the social and cultural value of live music more generally.

Venues are seen as spaces in which to spend time with friends and family and/or in which to make new friends or acquaintances. Musicians also associate some venues as being significant in developing networks with fellow musicians or music industry practitioners.

Musicians in particular also emphasise the importance of encountering supportive and friendly staff, as the following musician explains:

> *It's nice to be appreciated and see a venue happy to see you - a hello, some beer tokens ... rather than head barmen/owners who forget the bands work as long*

> *[hours] as they do.*
> Male semi-professional blues guitarist, 40-44 years old, Scotland.

These social aspects of a venue are also appreciated by audience members, for whom friendly audiences, friendly staff – especially security – and feeling safe are other themes coming out of the data. The ethos of the venue is another aspect of venues' social value, with some respondents drawing attention to the independent nature of the venue, the fact that it does charitable work, or that it is run by volunteers.

Audiences – and to a lesser extent, musicians – value a venue which has a consistently good 'atmosphere', a term used mostly without further explanation or attempt to define its meaning.[xlix] Some respondents commented on the experience of togetherness or collective experience at their chosen venue. The fact that this notion of social or cultural value was also apparent in Chapter 2 on the value of live music in general further illustrates the close connection between the venue and the participant's experience.

Aesthetic value

The character or aesthetic of the building itself is another theme in the data, perhaps suggesting that the look and feel of the surroundings can enhance the enjoyment of the event. For instance, for one audience survey respondent:

[xlix] Equating 'atmosphere' with 'vibe' allows the use of a definition which has come out of research by Kai Fikentscher into underground dance music audiences in New York, in which vibe refers to 'interaction within and between audiences and performers associated with feelings of collective experience' (cited in Live Music Office 2014, p. 29).

It is a stunning venue, with fantastic acoustics. Atmospheric, as well as practical for music … The venue compliments and makes the performance feel special and intimate … I really look forward to travelling to go there.

Audience survey, female, 25-29 years old, West Midlands.

Another key theme under the heading of aesthetics is the venue's content or programme, with respondents seeming to value venues with diverse programmes, those which include the artists or genres that they particularly like, and also where the venue offers consistently high quality in its programming. Venues which are particularly associated with certain genres also feature, particularly less mainstream genres such as underground electronic music, folk, metal and 'new music'. Those spaces for live music which support local and/or emerging artists or new projects are another key theme, this being of particular significance to musicians.

Related to symbolic value above and highlighting venues' cultural value and impact on the local area, some respondents remark upon the fact that their chosen venue puts on high status or international artists or brings artists to the area who perhaps would not usually tour there.

Material value

Audiences and musicians also commented on other more material aspects of the venue, one being the size of the venue and the proximity to the artist. For a number of audience survey respondents, the fact that some venues are large but still manage to retain an intimate feel is important. In other words, that the venue attracts high status artists but still allows for close proximity – or at least the *perception* of close proximity – to the artist on stage.

It is also noteworthy that a number of audience survey respondents remarked upon having seen an artist at a small venue who then went on to play much bigger venues; the subsequent accrual of ‘subcultural capital’ (cf Thornton 1995) perhaps summed up in the following comment:

> *[I’ve] been to many gigs here over the years with friends and have seen many small bands that went on to become big, which I think is cool.*
> Audience survey, male, 20-24 years old, Scotland.

Good sound or acoustics is important to both audiences and musicians. An aspect of the venue which appears to be of more significance to audiences than musicians is good sightlines, again relating to a sense of being in close proximity to the artist, or simply being able to *see* the artist. Furthermore, more than one respondent to the audience survey noted the importance of being able to see the artist unmediated, without the need for video screens. The venue’s layout is important to some respondents, particularly the location of the bar facilities in relation to the performance area. The comfort of a venue is important to some, although, conversely, some value a more deliberately uncomfortable physical or sensual experience, as suggested by the following response:

> *Even though it was sweaty and dark and the floor was disgusting and the beer was crap I loved it.*
> Audience survey, female, 25-29 years old, Yorkshire and Humber.

The accessibility of venues is another repeated theme, whether in the sense of being local or close to the respondent's home, or easily accessible via public or private transport. Venues are also appreciated for their scarcity value, particularly if they are the only local venue of their type. As the following respondent explains:

> *Nice small venue – great acoustics – apart from pub gigs and one off venues this is the only venue within a 60 mile radius.*
> Audience survey, male, 55-59 years old, South West.

A fair price is a tangible aspect of the venue which comes through in both the audience and musician surveys. For audiences, this aspect of material value relates to the price of tickets or food and drink, while for musicians, it tends to be around pay or hire fees.

Some musicians spoke of venues being significant because they enable them to promote their own shows, forming both a source of income and the opportunity to perform and choose with whom to perform.

Role in musical development

Venues as sites of musical development is another key theme in both the musician and audience online surveys and is also related to the theme of narrative value discussed above. As also mentioned in Chapter 2, discovering new artists or genres is a factor particularly emphasised by audience members, with some respondents explaining that the venue has been formative in developing their musical appreciation and expanding their musical tastes, or for a small number of respondents, in influencing their career choices. For example:

> *I grew up in Manchester and have seen some of my favourite artists perform there over the last 20 years, starting with Spice Girls aged four. I now work in the live music industry and strongly feel this venue kickstarted my interest in live events.*
> Audience survey, female, 25-29 years old, London.

For some respondents to the musician survey in particular, by seeing other artists ‘in the flesh’, venues can also be sites for inspiration and creativity, whether to see or learn new techniques or simply by seeing their musical heroes live on stage. Venues may also be seen as significant for being places where musicians feel that they developed new skills or built confidence as a performer. Learning may not always come from a positive experience, however. As the final quote in this chapter illustrates, for one musician her chosen venue is significant because:

> *[It’s] the first venue that really ripped us off as a musician too, so it's been important in teaching us the ins and outs of the system I suppose.*
> Female amateur indie vocalist, 20-24 years old, London.

From these assertions, then, it can be seen that venues have symbolic, narrative, social, aesthetic and material value, and are valued for their role in musical development and for their accessibility (and sometimes their scarcity). It is noticeable that some of the qualities defined here overlap with the qualities associated with live music as a whole discussed in Chapter 2. This is of course not surprising but does highlight the extent to which the venue is an intrinsic part of the whole live music experience.

Chapter 5: Valuing smaller spaces for live music

The measures of social and cultural value set out in the previous chapters are not restricted to particular genres of music or venue types. Rather, they cover a wide variety of different genres and types of performance, from small venues right up to large-scale concert halls.. Keeping in mind the challenges to smaller venues set out in the introduction to this report, this chapter will focus on smaller spaces for live music to better understand the relationship of these spaces to the wider music ecology.

Venue types most frequently visited by respondents to the audience survey

Over three-quarters (78%) of respondents to the audience survey had visited small music venues (under 350 capacity) for live music in the past 12 months, and three-quarters (74%) of respondents to the audience survey had visited pubs and bars for live music.[62] Medium and large music venues (both 65%) and concert halls/auditoria (59%) were also key sites of live music attendance.

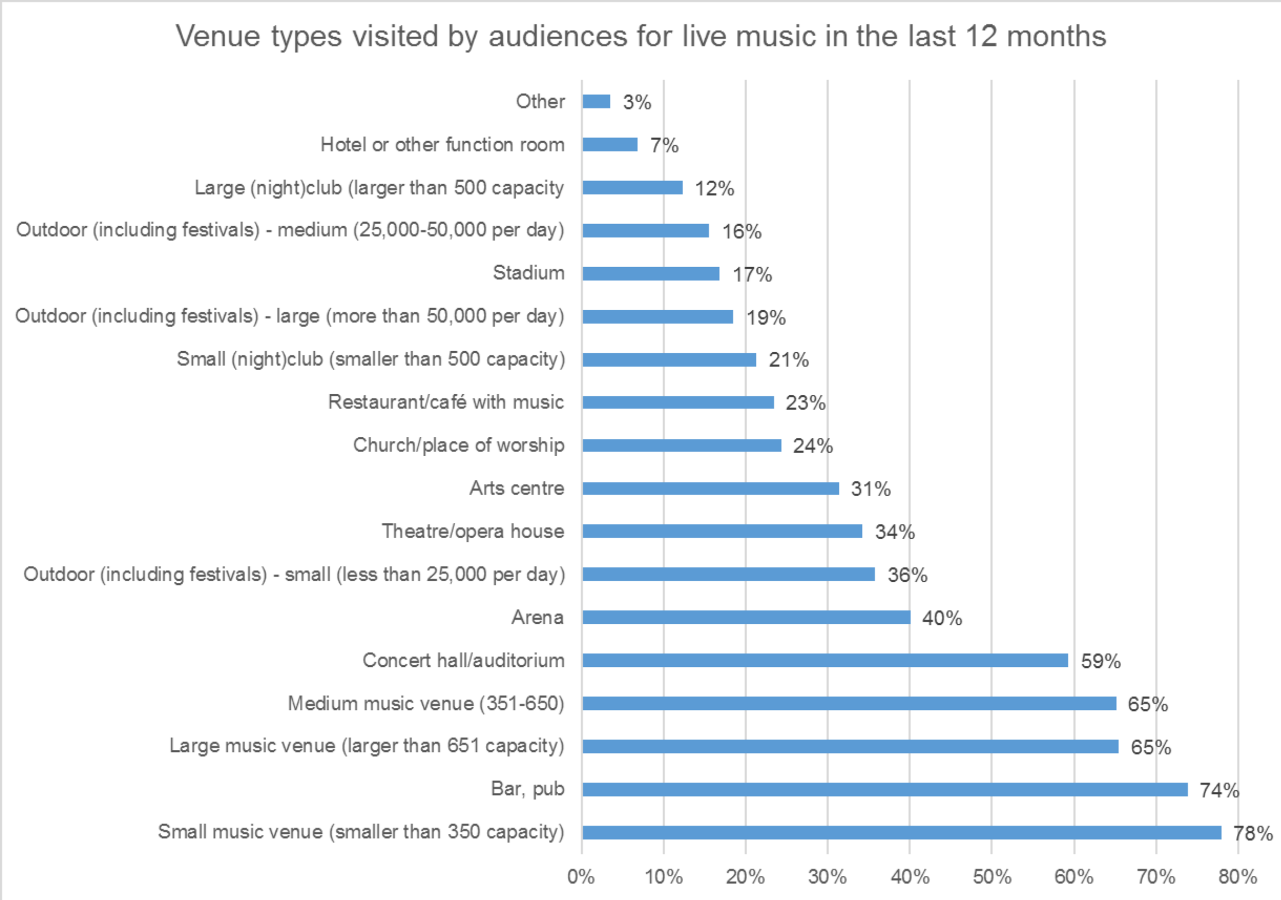


Figure 23: Venue types visited by respondents to the audience survey for live music in the last 12 months

Venues types most frequently performed in by respondents to the musician survey

Overall, 67% of all respondents to the musician survey had performed in small music venues in the past 12 months, 64% had performed in pubs or bars, 38% of musicians had performed outdoors (smaller than 25,000 attendees per day),[l] and 31% had performed in churches or other places of worship.[63] As was found in the Edinburgh Live Music Census, this further suggests that these smaller venues are the 'bread and butter' venues for most local musicians (Behr *et al* 2015: 6).

Breaking this down into different types of musicians, 70% of respondents to the musician survey who identify as professional had performed in small music venues in the past 12 months, 82% of semi-professional musicians had performed in pubs or bars, and 59% of amateurs had performed in churches.[64]

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[l] The list of venue types did not distinguish between urban and greenspace outdoor spaces and it is possible that 'outdoor – small' in this case also includes urban sites used for busking.

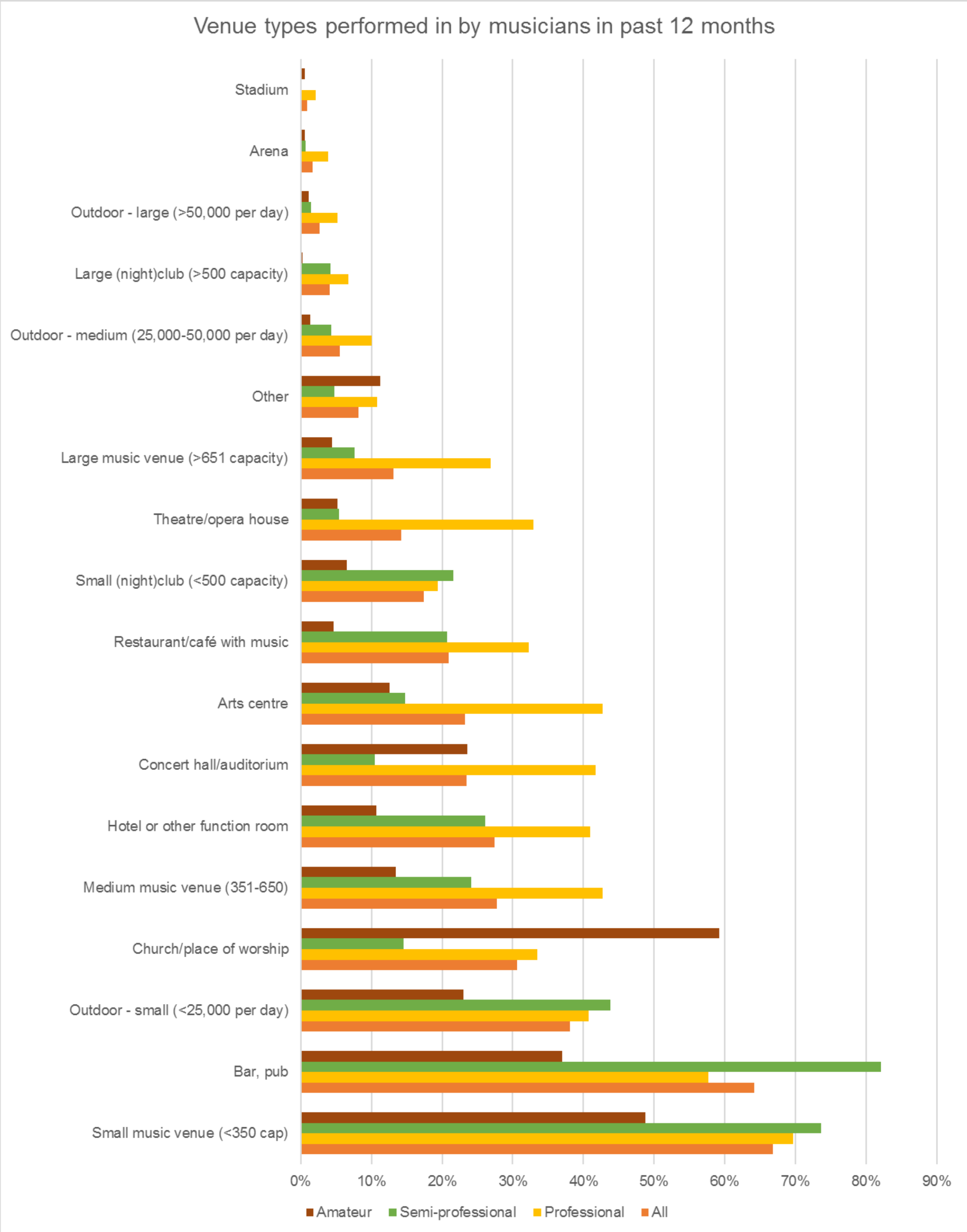

Figure 24: Venue types performed in by respondents to the musician survey in past 12 months

Venue types performed in most frequently by 'emerging' and 'formative years' musicians

Smaller spaces for live music are particularly key in musicians' formative years. 78% of respondents to the musician survey identifying as being in their formative years and those identifying as 'emerging' musicians had performed in small music venues in the past 12 months, and 78% had performed in bars or pubs.[65]

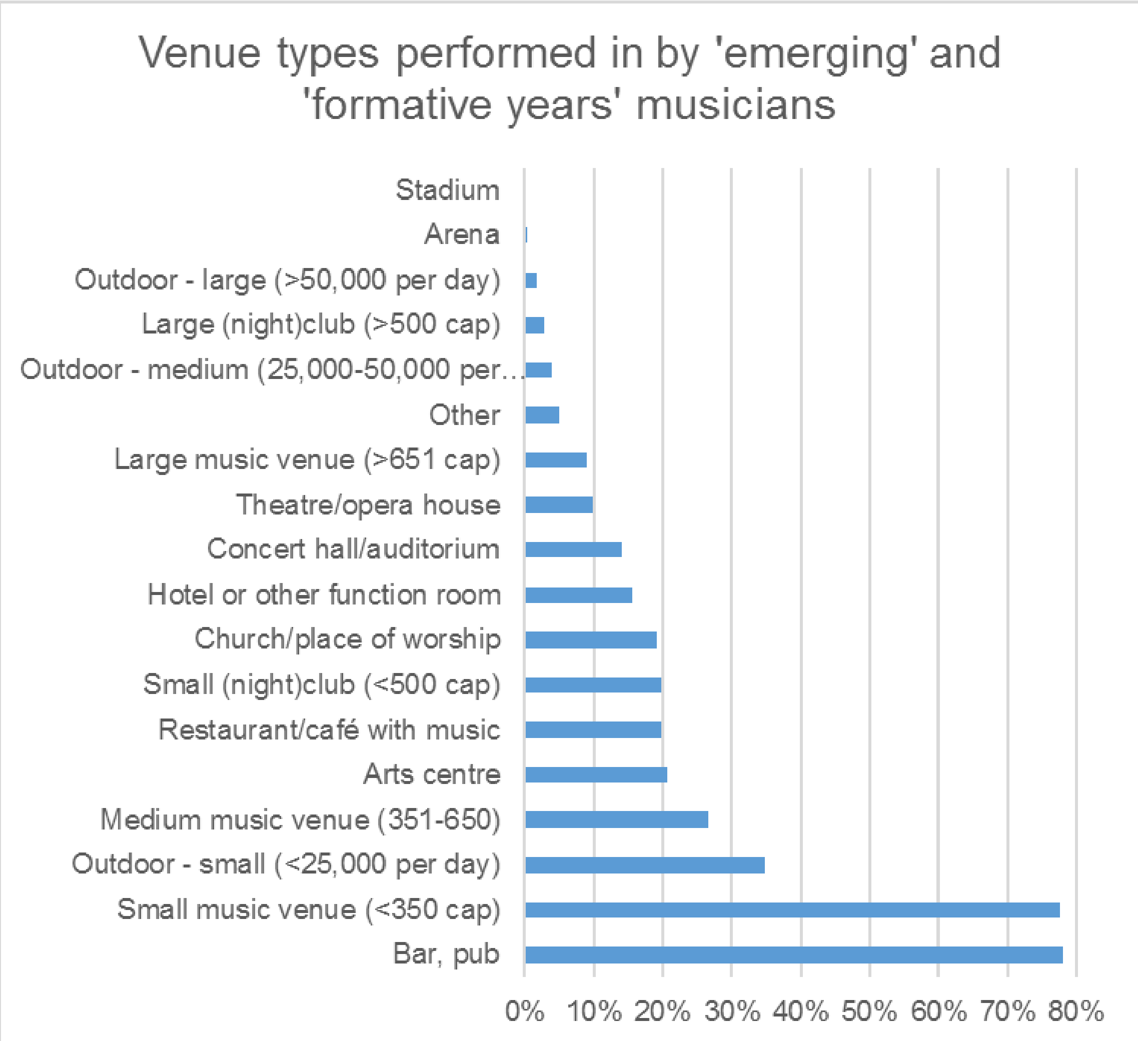

Figure 25: Venue types performed in by 'emerging' and 'formative years' musicians

As Guy Dunstan of the Birmingham NEC Group and National Arenas Association puts it, 'I think some of the issues and where the support is needed is at the smaller end of the scale, and at the grassroots level. Because we’re reliant on artists being developed through that network and scaling up to arena acts’ (cited in Behr *et al* 2014: 4).

Venue types most frequently used by respondents to the promoter survey

Examining the use of spaces for live music from another perspective, 71% of respondents to the promoter survey regularly promote in small music venues, 34% in pubs and bars, and 22% in churches and other places of worship.[66]

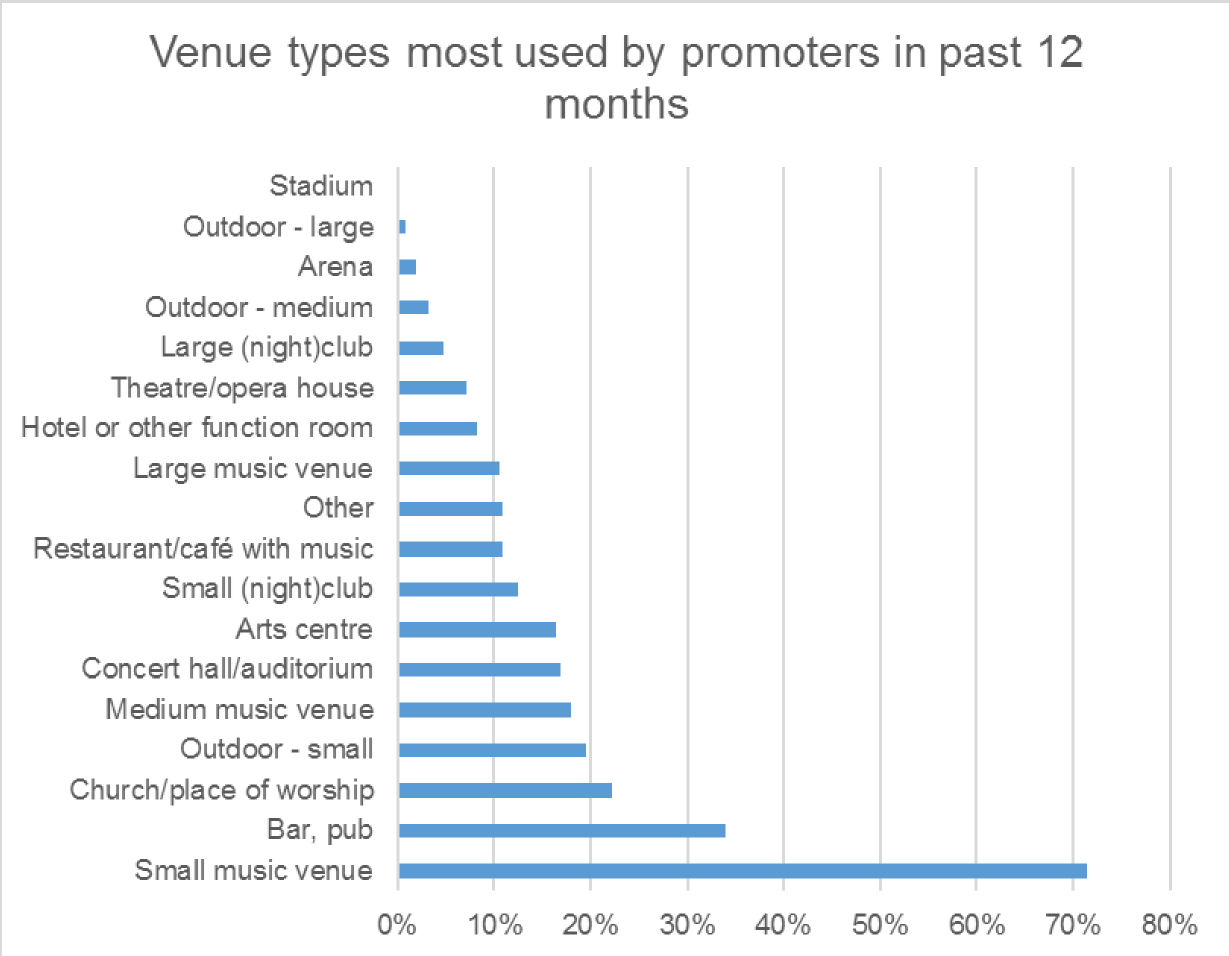

Figure 26: Venue types most used by respondents to the promoter survey in past 12 months

Types of ensemble most frequently hosted by venues

The UK Live Music Census asked respondents to the venue survey to select all the types of ensemble that they regularly host or promote. As can be seen in the chart below, 70% of respondents to the venue survey regularly host original bands and 42% host cover bands.[67] In Chapter 6, it will be seen that it can be difficult for musicians to get the opportunity to perform original music. Highlighting the importance of small music venues for original music, it is worth adding here that 94% of small music venues host/promote original bands and 34% host/promote cover bands, as can be seen in the chart below.[68]

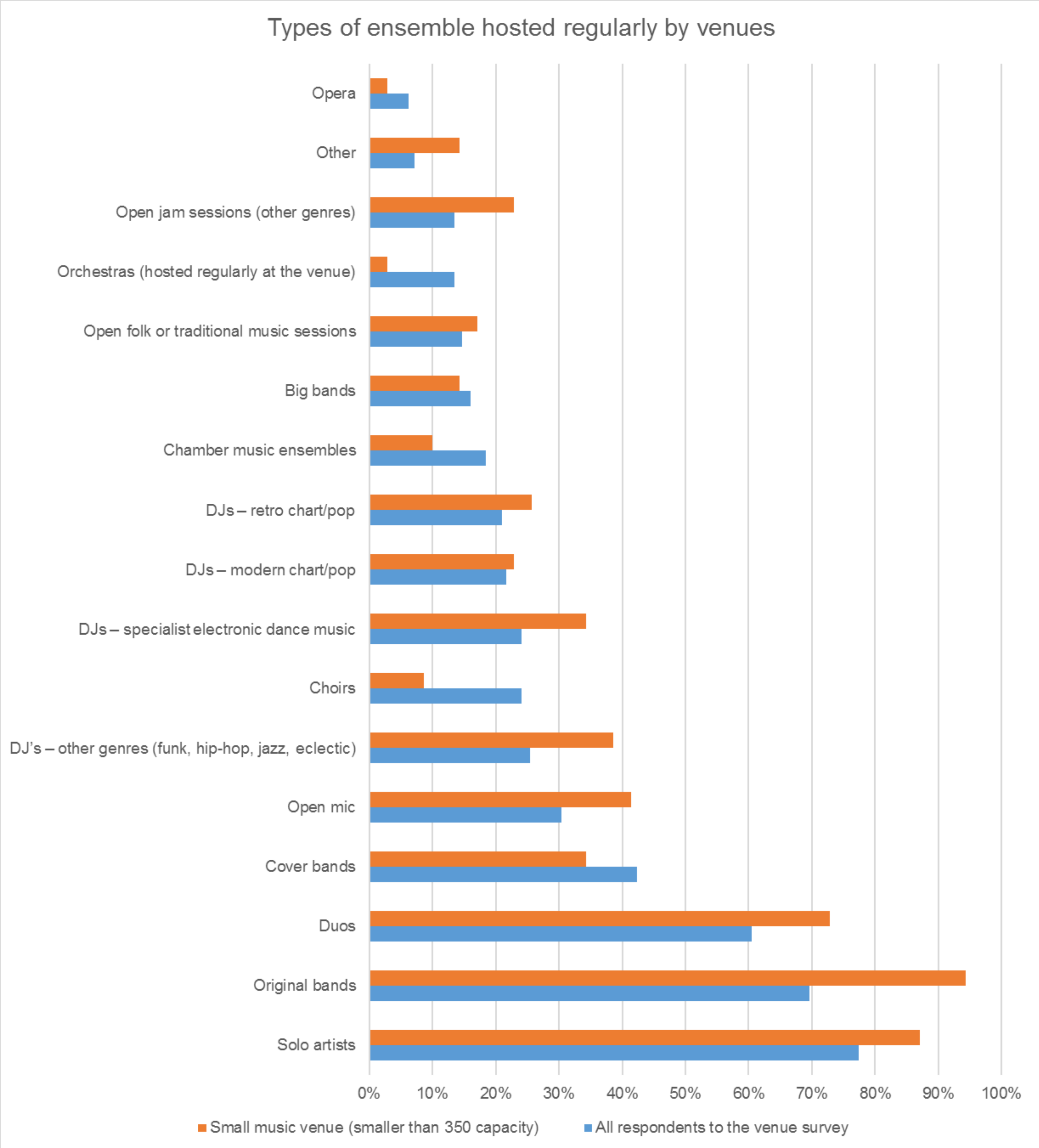

Figure 27: Types of ensemble hosted regularly by respondents to the venue survey

Genres regularly hosted by venue types

As discussed in Chapter 1, the four genres from which respondents to the musician survey are most likely to earn money are rock, pop, blues and classical. The following charts show the venue types most likely to regularly host/promote each of these genres.[69] As can be seen, small and medium music venues and bars/pubs are the most significant venues for blues; churches, concert hall/auditoria and arts centres for classical music; medium and large music venues and 'other' for pop music ('other' here includes student unions, village halls, social clubs, etc.); and small, medium and large music venues for rock music.[li]

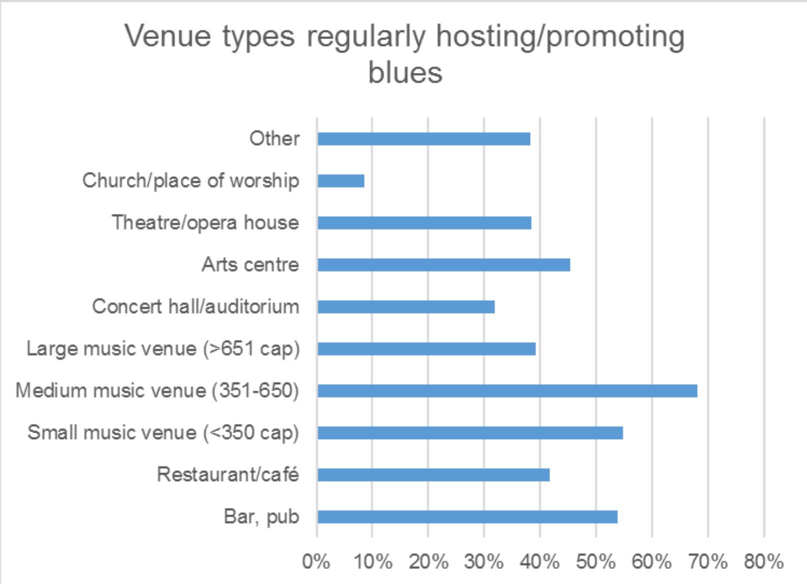

Figure 28: Venue types regularly hosting/promoting blues

[li] Note that not all venue types are featured due to insufficient returns to the online venue survey from the following venue types: hotels or other function rooms, small/large nightclubs, arenas, stadia, outdoor spaces (small/medium/large).

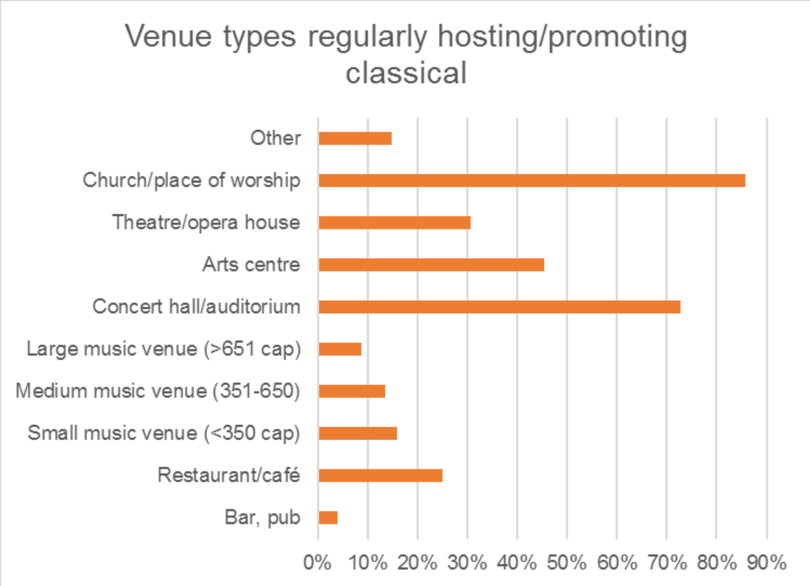

Figure 29: Venue types regularly hosting/promoting classical

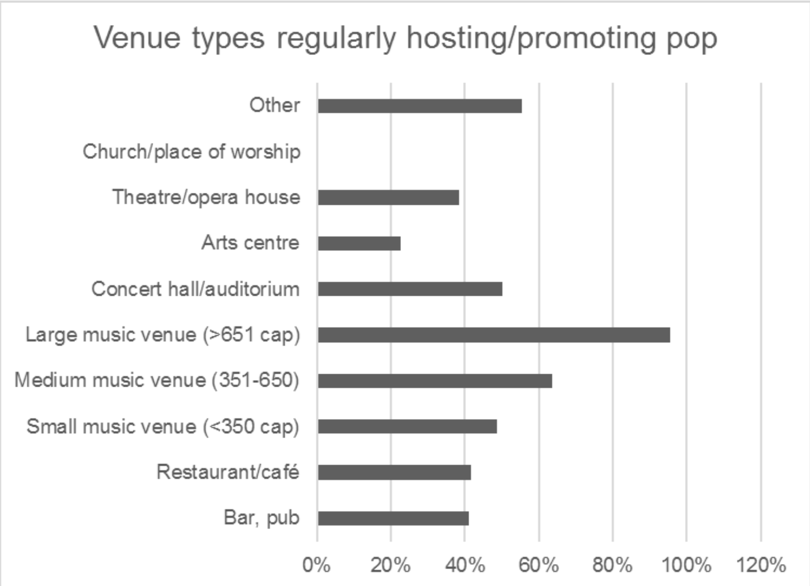

Figure 30: Venue types regularly hosting/promoting pop

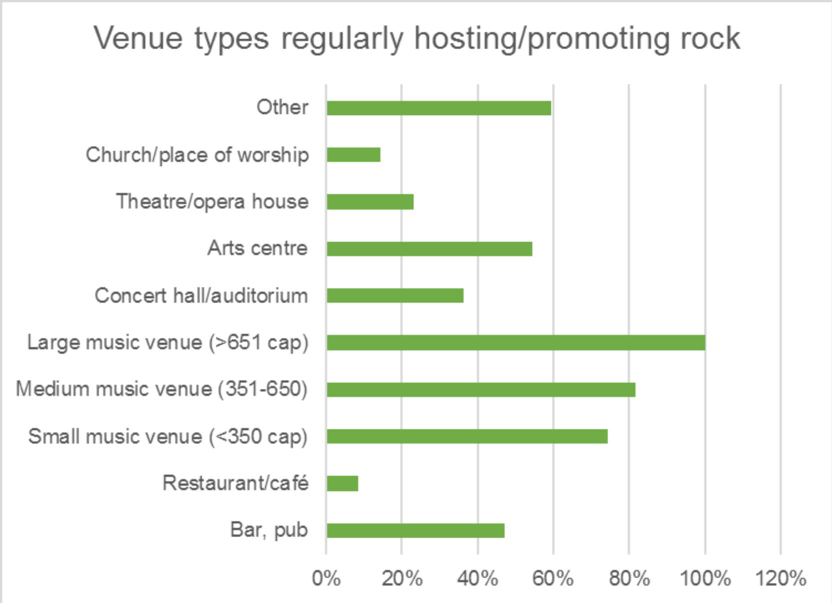

Figure 31: Venue types regularly hosting/promoting rock

As this chapter illustrates, smaller spaces for live music perform a key role within the overall live music ecology in terms of being the most frequented by audiences, performed in by musicians – particularly in their early careers – and for musicians to earn money in. To this end, we make the following two recommendations:

Recommendation 4. We *recommend* that local authorities recognise small and medium music venues as key sites of artist and audience development and as cultural and community assets.

For example, such venues could be named in policies, local authorities could reach out to them for representations in licensing forums, etc.

Recommendation 5. We *recommend* that any local authority cultural policy recognises the economic and cultural value of live music and live music venues to the local region, and that planning and economic policies take account of the actual and potential contribution of live music. (One way of doing this would be to set up a Music Office and/or Night Mayor/Czar, following the example of cities such as Amsterdam and London.[lii])

However, as mentioned in the introduction to this report, the last several years have been extremely challenging for live music venues, particularly those at the smaller end of the spectrum. With the ideas around value explored in the previous pages in mind, the next chapter will examine some

[lii] See Henley 2016; Greater London Authority 2016.

of the challenges currently facing the sector before discussing suggestions by survey respondents as to how the government could improve the live music scene.

Chapter 6: Challenges within the sector

Previous chapters have sought to better understand the value of live music and its venues, with a particular focus on the smaller spaces for live music. This chapter will now focus on challenges within the sector, starting with the challenges currently facing venues.

Venues

As seen in Chapter 4, musicians were asked to name a venue which had been significant to their career. Without being prompted to do so, nearly 10% of the respondents to the musician survey who named a venue pointed out that the venue has either been demolished or no longer puts on live music due to change of use.[70] It is noticeable that the venues that they are lamenting tend to be pubs[liii] and small music venues. As one musician suggests:

> *There needs to be a policy in place to protect established live music venues from noise complaints from new housing developments. Small venues seem to be shutting their doors all over the place at the moment.* Male professional rock musician, 25-29 years-old, South West, plays drums.

In recent years, there has been widespread concern that the smaller end of the live music sector in particular is facing a 'perfect storm' of issues which is affecting the viability and sustainability of those venues (cf Music Venue Trust 2015).

[liii] The numbers of pubs in London have fallen by more than a quarter between 2001 and 2016 due to factors like property development and rising business rates (Razaq 2017). In the UK more broadly, pubs are currently closing at a rate of 21 per week due to demolition, change of use, and the high cost of a drink (Campaign for Real Ale 2017).

For example, research into the cultural value of venues in 2014 showed that the weakest point of the live music ecology are small to medium independent venues (Behr *et al* 2014: 24). A report into 'grassroots' music venues by the Mayor of London's Live Music Taskforce in 2015 identified the following issues that are negatively impacting on 'grassroots' venues in the capital (2015: 15-21):

- A growing population and rising property prices;
- Increased business rates;
- Planning and development;
- No 'Agent of Change' principle;[liv]
- Licensing and policing;
- International competition;
- Fragmented approach to the night-time economy; and
- A need to change the way that 'grassroots' music venues are talked about.

The same report suggests that London has lost 35% of its 'grassroots' venues since 2007 (ibid.: 8). An updated report into London's small venue sector published in 2017 suggests that this decline appears to have since flattened out (Mayor of London's Music Venues Taskforce 2017: 15), and could be due either to new venues opening up or the interventions of groups like the Music Venue Trust's Emergency Response Team. Of course, the loss of a third of 'grassroots' venues to London will have had an economic impact as well as a social and cultural one.

[liv] Note that in 2017 the Mayor's Office agreed to adopt 'Agent of Change' in its future planning policies (Greater London Authority 2017)

However, without longitudinal data it is difficult to know whether such a decline is ‘usual’ in this sector. As academic Chris Adams put it:

> *Small businesses fail all the time, with the statistic of up to 50% in the first five years of trading widely touted as the casualty rate. Notably, over 25% of those surveyed in [Music Venue Trust's]* Understanding Small Venues *report (2015) are in their first five years of operation, suggesting we should expect many of them not to survive their infancy. In the process, they can be assumed to be competing against, and perhaps undermining the survival chances of other hard pressed, and sometimes iconic small venues*
> Adams 2016.

To quote Simon Frith, ‘failure is the norm’ within the music industries (2001: 33). However, more longitudinal and historical research is required in order to better understand whether this is necessarily the case in the live music venue sector.

Recommendation 6. We *recommend* that research is undertaken into the reasons behind venue closure and a historical understanding of what constitutes a ‘normal’ rate of attrition in the live music sector.

For this project, the UK Live Music Census explored the challenges currently facing the venue sector more broadly. It is important to note that the census does not include data from venues which have closed and that the following findings include all the venue types which participated in the census for which we have data.

Barriers to success

The UK Live Music Census set out to examine whether issues such property development and noise complaints were a sector-wide problem. It found that on average:[71]

- A third (33%) of all respondents to the venue survey were extremely, strongly or moderately negatively affected by increased business rates in the past 12 months;
- Nearly a third (31%) were negatively affected by parking/loading issues in the past 12 months;
- Over a quarter (27%) were negatively affected by noise-related complaints in the past 12 months;
- More than one in five (22%) were negatively affected by issues with planning and property development in the past 12 months;
- Nearly one in five (19%) were negatively affected by licensing issues in the past 12 months.

However, examining only those respondents to the venue survey which identified themselves as small music venues and bars/pubs shows that these external factors appear to be disproportionately affecting the smaller end of the live music sector, as seen in the chart below:[72]

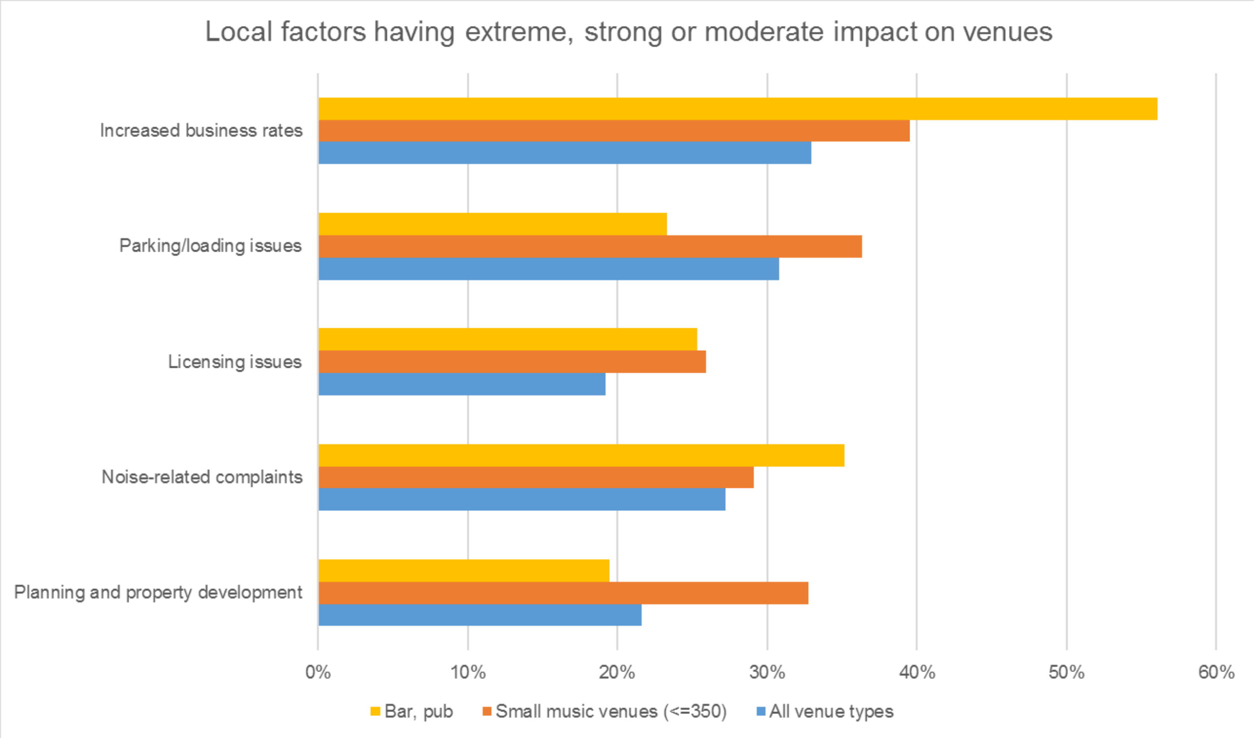

Figure 32: Local factors having extreme, strong or moderate impact on respondents to the venue survey

- 40% of respondents to the venue survey identifying as small music venues and 56% of bars/pubs were negatively affected by increased business rates.[lv]

The business rates revaluation came into force on 1 April 2017 during the UK Live Music Census collection period. The revaluation was intended to 'make the system more accurate by ensuring business rates bills reflect the property market' (Ministry of Housing, Communities & Local Government 2017). However, as UK Music pointed out at the time, one small venue, the Lexington in north London, saw a rise of 118% in its rateable value this year while Arsenal's 60,000-capacity Emirates Stadium nearby enjoyed

[lv] Although sufficient census data was not forthcoming about nightclubs in order to be able to draw meaningful conclusions about the nightclub sector, some reports in the media in the last couple of years also appear to suggest that nightclubs, particularly in London, are also being negatively affected by similar factors, including increased business rates and property development (Cafe 2016, Lima and Davies 2017, Little 2018).

a 7% cut in its rateable value (UK Music 2017g). And as one respondent to the venue survey suggests:

> *[We need an] emergency action plan to review business rates for all grass roots music venues. Our new rateable value has just quadrupled from £17,500 to £72,000. WHY??*
> Medium music venue, South West, hosting/promoting live music for more than 30 years.

Based on the data about the impact of increased business rates on venues from respondents to the venue survey above, and on later suggestions by respondents to the venue and promoter surveys in Chapter 7, we make the following recommendation:

Recommendation 7. We *recommend* that the UK government reviews business rates for music venues and other smaller spaces for live music.

- 33% of respondents to the venue survey identifying as small music venues were negatively affected by planning and property development in the past 12 months; and
- 29% of venue survey respondents identifying as small music venues and 35% of bars/pubs were affected by noise-related complaints.

The following excerpt from a profile interview with the bar manager of a small music venue in Belfast illustrates some of the problems that planning and property development and ensuing noise complaints can cause (emphases in original):

Profile: Richard McCallion, Bar Manager, The American, Belfast

The American Bar opened in October 2016 in a building dating back to the mid-1850s. It’s a 100 capacity pub with a 50 capacity venue upstairs … The American was initially set up because a couple of years ago our sister pub, The Sunflower, was facing demolition to make way for a proposed redevelopment of the area, and the owner wanted an alternative site in case we lost the venue. Luckily a social media campaign and petition which collected over 5,000 signatures helped to save The Sunflower, which has now become one of Belfast’s most well-known live music venues.

There are a lot of new apartment blocks being built in Belfast, though, which is causing problems. Belfast has traditionally been somewhere where people live in the suburbs rather than the city centre, and for years the city was gated off so you couldn’t get in even if you wanted to. Now, though, more apartments are being built and I can envisage more problems for live venues with an increased city centre population.

Even though The Sunflower – our sister pub where I used to work – had been a pub for about sixty years, residents of some new apartments which had been built next door complained about the noise. If residents ring a number and make a complaint it’s very easy for them to pick up a phone and *ruin* a business. In the end, the council’s dedicated licensed premises officer organised a really useful mediation session actually *in* the venue between us and the residents’ group, and we agreed to put a noise limiter on the PA system and do some soundproofing. It cost us financially but at least we fixed the problem and were able to build up a relationship with the complainants. Some of them are now regulars at the venue!

In general, we would like to see more understanding from people that if you move in next to a venue then there will be noise. Also, we want a level playing field so that it's not just you as the venue that's having to pay out financially to fix the problem. It would also be good to see the council taking more responsibility and to invest in infrastructure rather than letting developers throw up yet another 13-storey apartment block without considering the impact on the locality.

'Agent of Change'

At the time of writing (January 2018), the Ministry of Housing, Communities & Local Government has announced new legally binding rules to include the 'Agent of Change' principle within the National Planning Policy Framework for England (NPPF) (Ministry of Housing, Communities & Local Government 2018). In doing so, the government is taking a similar approach to the Welsh Government and the Mayor of London who pledged to adopt the principle in their planning policies in 2017 (Welsh Government 2017; Greater London Authority 2017). We appreciate that local authorities are under pressure to build and develop new housing stock to address the current 'housing crisis' and that there is a balance to be reached between the rights of residents and the rights of venues. However, there is also the need for effective and fair planning which takes into account the rights of existing occupants and, more broadly, the economic, social and cultural fabric of the towns and cities which are undergoing transformation. It is expected that a draft NPPF will be available in the spring when it will be subject to further consultation. It is anticipated the NPPF will come into effect in summer 2018. With this in mind, while the government has now made a formal commitment to introduce 'Agent of Change' to the NPPF for England, we hope that it remains robust, even under any possible pressure from the property sector (cf Cooke 2018b), and that 'Agent of Change' is adopted across the whole of the UK.

Based on the data about the impact of property development and noise complaints on venues from respondents to the venue survey above, and on the later suggestions from venues and promoters in Chapter 7 of this report, we make the following recommendations:

Recommendation 8. We *recommend* that the UK government continues to develop a legally binding 'Agent of Change' principle, including a prompt and robust implementation into the new National Planning Policy Framework for England.

Recommendation 9. We *recommend* that devolved administrations work towards the inclusion of 'Agent of Change' into national planning frameworks in Scotland[lvi] and Northern Ireland, taking a similar approach to England and Wales.

[lvi] We note that in December 2017, Lewis MacDonald MSP made a ministerial statement on planning at Holyrood with regard to the implementation of the 'Agent of Change' principle in Scotland (McDonald 2017). In late January 2018, Scottish live music industry reps led by DF Concerts' Geoff Ellis called on the Scottish government to implement 'Agent of Change' in Scotland

It is also worth noting that large venues (over 651 capacity) also appear to be disproportionately affected by external factors: 63% reported that their events have been negatively impacted by noise complaints and 75% of large music venues by parking/loading issues. However, it should be pointed out that this data comes from only 16 respondents and also that the majority of the respondents are based in city centres. Even so, it does highlight the problems faced by venues in built-up urban environments and also that such issues are not limited to the smaller venue sector alone.

It is also worth exploring the differences between respondents to the venue survey who defined themselves as being either in an urban or a rural location.[73] As can be seen in the chart below, the issues identified above appear to be, perhaps unsurprisingly, affecting urban venues more than rural ones, although rural venues are certainly not unaffected by external factors:

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following the UK government's announcement earlier in the month (Malt 2018).

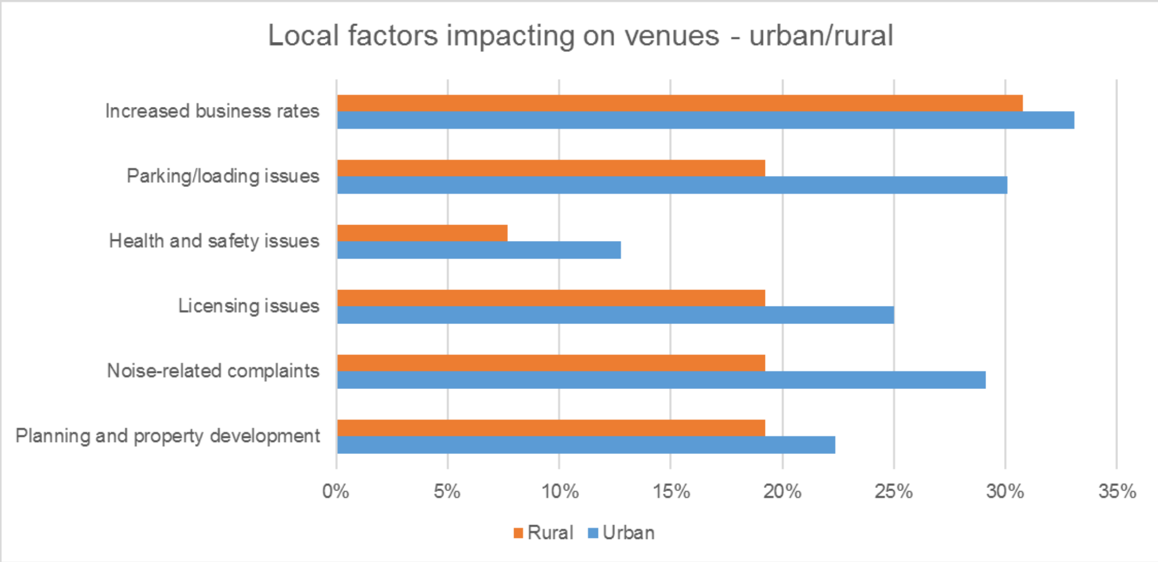

Figure 33: Local factors impacting on respondents to the venue survey - urban/rural location

The opening times of respondents to the venue survey help to shed further light on how and why the noise-related complaints occur. Overall, this suggests that 83% of these venues which responded to the online venue survey close after 9pm, demonstrating that live music is very much a night-time activity, as illustrated in the chart below.[74]

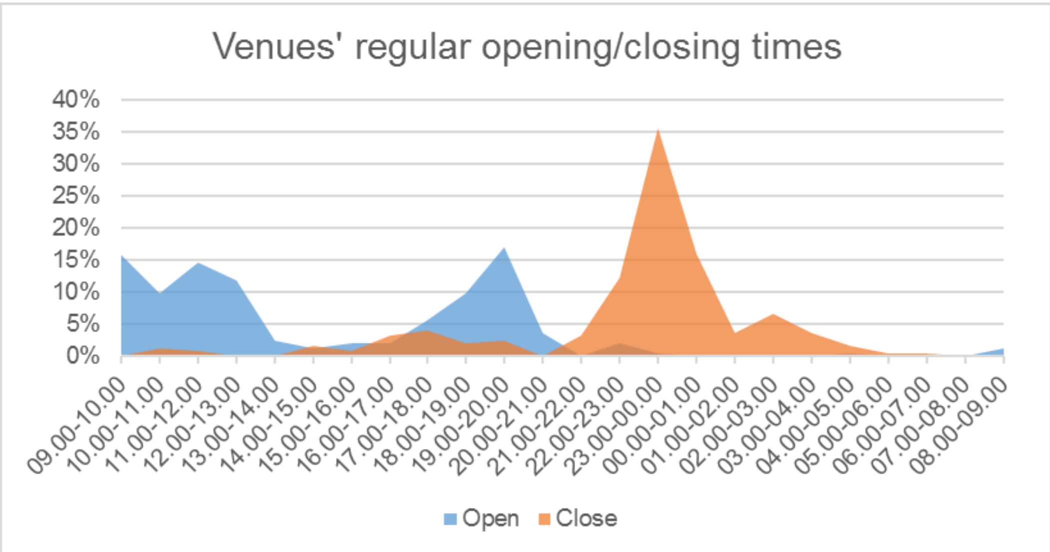

Figure 34: Regular opening/closing times of respondents to the venue survey

However, as Shain Shapiro of Sound Diplomacy notes:

> *The concept and practice of planning urban areas is tailored almost exclusively to daytime functions. This*

> *means, intentionally or not, the needs of the night-time are overlooked from a planning perspective. This creates significant tension in our town centres and central business districts around the world.*
> Shapiro 2017b.

This, he suggests, is one of the primary reasons that cultural and entertainment venues are struggling in city centres in the UK and beyond. With this in mind we make the following recommendation:

Recommendation 10. We *recommend* that local authorities work closely with *all* stakeholders on any proposed property developments that affect existing spaces used for live music, particularly those within the night-time economy.

The census also asked respondents to the online venue survey about other external factors impacting on their live music events in the past 12 months. It is interesting that some of these other external factors within the live music ecology appear to be causing as much as or in some cases even more of a negative impact than those identified above, as can be seen in the chart below:

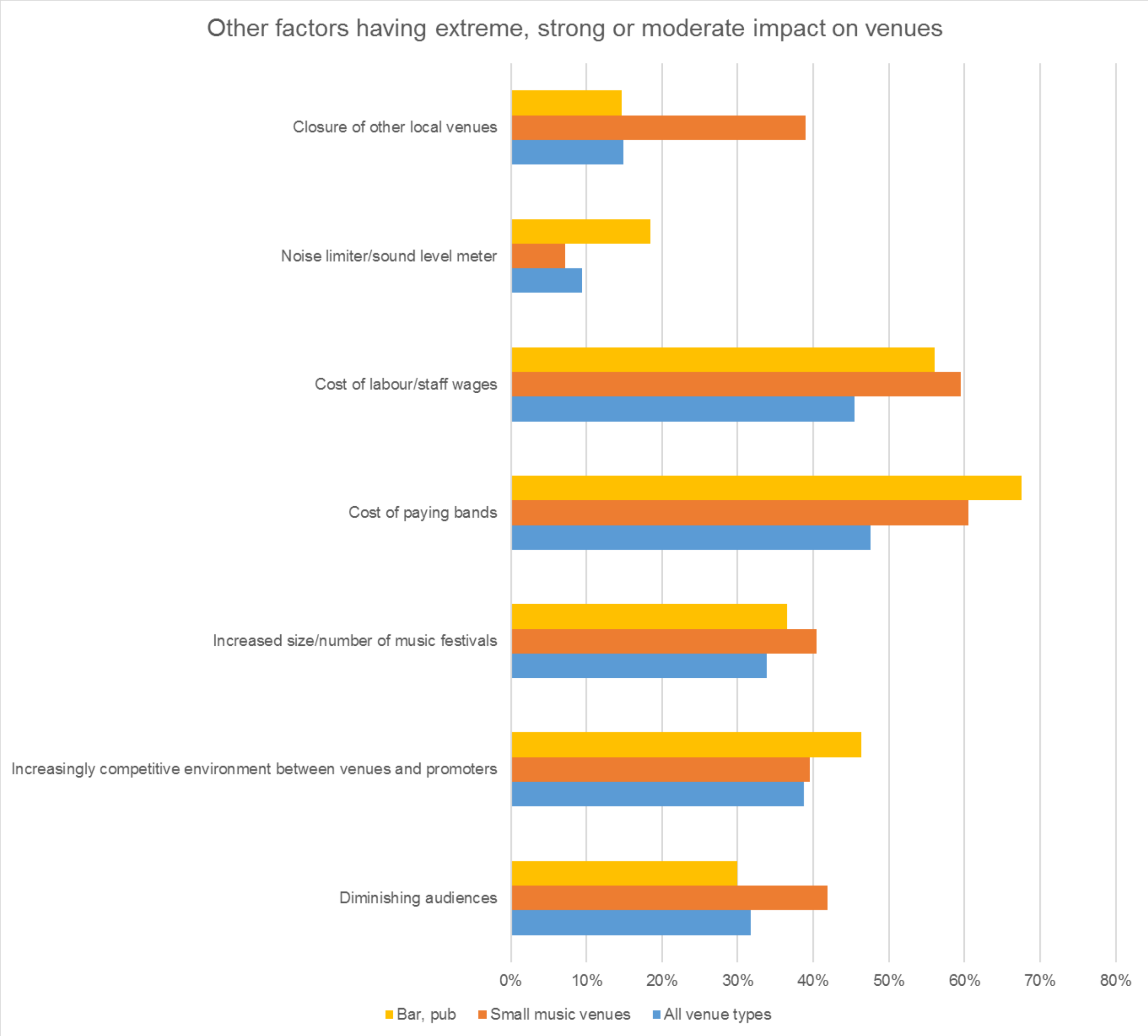

Figure 35: Other factors having extreme, strong or moderate impact on respondents to the venue survey

- 32% of all respondents to the venue online survey, 42% of those identifying as small music venues, and 30% of those identifying as bars/pubs reported that diminishing audiences had an extreme, strong or moderate negative impact on their events in the past 12 months;[75]
- 48% of all respondents to the venue survey, 60% of those identifying as small music venues and 68% of those

identifying as bars/pubs said that the cost of paying bands[lvii] had a negative impact;[76]

There are numerous and various kinds of deals used by venues, promoters and artists (for example, see ‘Playing for free’ in the challenges to musicians section later in this chapter), and, with margins tight for all parties, inevitable tensions can arise between the different stakeholders. For example, the respondents to the venue survey who felt that the cost of paying bands was problematic could include those concerned about their overall profit margins or about fees at a specific level of economic activity, especially when combined with increased business rates. Also note that the relatively high proportion of respondents in the chart who also cite the cost of labour/staff wages as having a negative impact. As an indicator of the overall complexity of the situation, it is worth comparing these findings to the barriers to success for musicians later in the chapter, in which 80% of professional musicians said that stagnating pay made it difficult for musicians to bring in a viable income. Furthermore, when asked to name a significant venue, some audience survey respondents remarked on the fact that their named venue is significant to them because it is free to get in, and this seeming tension between musicians wanting to be paid and audiences not wanting to pay also merits requires further exploration.

[lvii] Unfortunately there was insufficient detail within the responses to be able to ascertain the exact reasons as to why the costs of paying bands were seen as problematic by respondents to the venue survey. Also note the relatively low n values here for individual venue types and standard errors sometimes higher than 3%.

The following excerpt from a profile interview with a small music venue worker highlights the increased cost of bands and some of the other pressures on smaller venues:

Profile: Ricky Bates, Venue operator/booker, The Joiners, Southampton

The Joiners opened in 1968 so it will have been operating as a full-time touring venue for fifty years this year … The front of the venue is a pub with the live room upstairs, but we only open when live music is on so it is a live music venue rather than a pub. Over the years The Joiners has put on thousands of bands, some of whom have gone on to be huge, including Arctic Monkeys, Franz Ferdinand, Oasis and Coldplay. We are at the forefront of small venue touring in the country in terms of professionalism, and have some of the best sound and lights in the country for a 200-capacity venue.

The whole live music system's changed since I first started promoting eleven years ago. What used to happen was that the band would charge a £500 guarantee and the record label would pay an amount to support their 'per diems': their food, travel, etc. Now that record labels have stopped making money because you can just stream everything for free, the record income has shrunken hugely and so has tour support for bands. So that revenue now has to come from the live sector, which is *ticketing*, which is *us* (emphasis in original).

The labels can't afford to put their bands on tour and therefore the price of a band now is three or four times more than it was five years ago because that revenue stream has to come from somewhere else for the band to keep touring. So as well as the £500 guarantee, bands also take an 80% profit cut on top of their guarantee. On

200 tickets, that means that the venue's 20% is very small. If we put on the 800 capacity shows in external venues then we can make up to £1,000 possibly on a show, which goes straight back into the venue, on new microphones or XLR leads or on the general upkeep of The Joiners.

- 45% of all respondents to the venue survey, 60% of those identifying as small music venues and 56% of those identifying as pubs/bars have found that the cost of labour/staff wages had negatively impacted;[77]
- 39% of all respondents to the venue survey, 40% of those identifying as small music venues and 46% of those identifying as bars/pubs indicated that the increasingly competitive environment between venues and promoters had negatively impacted;[78]
- 34% of all respondents to the venue survey, 40% of those identifying as small music venues and 37% of those identifying as bars/pubs said that the increased size/number of music festivals had negatively impacted on their events in the past 12 months.[79]

This again appears to indicate that the smaller end of the live music sector appears to be disproportionately affected by these factors with the live music ecology. (Although, oddly enough, not by sound/noise limiters which appear to be having more of an impact on bars and pubs (18%) and large music venues (20%) than small music venues (7%), although there is a relatively low sample size for the former here.[80]) It is noticeable that the increasing competition between venues and promoters is a source of concern to respondents to the venue survey, and in future live music censuses it would be useful to monitor this active development/maintenance of local networks. (See the interview with the Events/Venue Manager of BLOC+ in the Glasgow snapshot in Chapter 8 for an interesting example of what he perceives to be an increasingly competitive local live music environment.)

Again it is worth exploring the differences between venues in urban and rural environments. It appears that, unlike factors like noise complaints, live music ecology factors are not limited to the urban environment. Diminishing audiences and the costs of paying bands and staff are seemingly having more of a significant impact on rural venues than on urban ones.[81] However, the relatively low sample size for rural venues here should be noted.

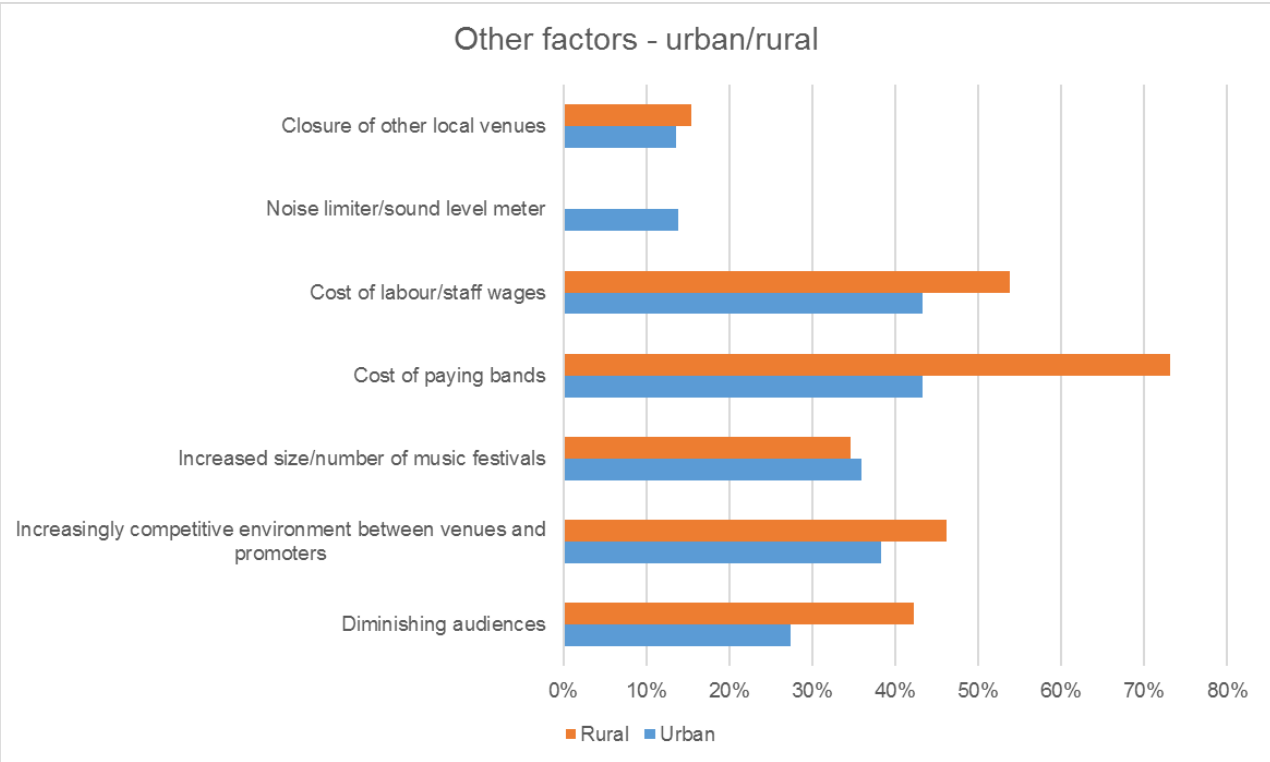

Figure 36: Other factors impacting on respondents to the venue survey - urban/rural

From the above, then, it appears that there are a number of factors which are negatively impacting on venues' live music events and that some of these factors appear to be disproportionately affecting small music venues compared to venues as a whole. Some of these are extrinsic – such as noise related complaints – some of which are factors within the live music ecology, such as the closure of other local venues. It appears that increased business rates are having a significant impact across the sector with a third of all respondents' venues negatively affected by increased business rates in the past 12 months.

Gaps in local venue provision

The interview with Ricky Bates above demonstrates how bookers from smaller venues also promote in larger spaces for live music external to their 'home' venue and illustrates a measure of intra-sector exchange within the live music ecology. Indeed, over a quarter (27%) of respondents to the venue survey said that they promote in other venues in addition to the venue for which they were completing the survey.[82] In this way, venues act as 'independent' promoters as well as promoting at their own venue, which enables them to maintain relationships with artists (and their representatives) as they progress in their career. This perhaps explains why another external factor having a seemingly disproportionately impact on the small venue sector is the closure of other local venues, with 39% of small music venues citing this as having an extreme, strong or moderate impact on their live music events in the past 12 months.[83]

'Gaps' in local venue provision mean that venues and local promoters may lose out on bookings with artists if a suitable local venue is unavailable or non-existent, meaning that the artist may have to play in a different town or city. This can cause disruption in the relationship between artist and a place, both in the relationship between an artist and key local venues and promoters, and, perhaps more importantly, between the artist and their fanbase in that location, as suggested by the following respondent to the venue survey:

> *The biggest issue we face is that we work hard to find and book exceptional new artists, promote them, pay them (despite low attendance) then once their name gets known, watch them move on to new agents and larger venues, who ultimately benefit directly from our hard work, with little or no return.*
>
> Small music venue, South East, hosting/promoting for 5-10 years.

Note that the number and type of live music venues is of course determined in part by the size of the local population. The lack of data into venue provision within the local live music ecology leads us to make the following recommendation:

Recommendation 11. We *recommend* further research into local venue provision in order to understand best practice in terms of capacity and venue types.

The impact of festivals

As shown above, 34% of all respondents to the venue survey, 40% of small music venues and 37% of bars/pubs said that the increased size/number of music festivals had negatively impacted on their events in the past 12 months.

The impact of the growth of the UK's festival sector on the wider live music ecology is still under-researched, but an increase in exclusivity deals and the consolidation of some major festivals and venues by large companies appears to be having an effect at the smaller end of the live music sector in particular. The following excerpt from a profile interview with a worker in a small music venue illustrates some of these impacts:

Profile: Ricky Bates, The Joiners, Southampton.

The touring season starts the second week of January to the second week of June and then it's festival season for 10-11 weeks. As soon as the Isle of Wight Festival begins, no-one tours and we can't get bands in so we tend to rely on local bands to keep us going over the summer. I essentially don't pay myself for those two months; we just pay business rates and rent on the building, so I have to forfeit money and so does everybody else. I work *at* festivals over the summer to get by (emphasis in original) ... The other side of this is that acts are signed to festivals not to play the vicinity of the festival or they can only play one show in a six week period, therefore eliminating their ability to play other shows anywhere in the country. Agents, managers and labels are all in a panic/competition for their band to do well so they will sign bands up to these exclusivity contracts.

Of course, many festivals are venue-based, for example the EFG London Jazz Festival, hence festivals for some venues represent opportunity rather than challenge. Further research is therefore required to better understand the impact of festivals on the key stakeholders within the live music event (cf Webster and McKay 2016: 21). To this end, we make the following recommendation:

Recommendation 12. We *recommend* further research into the impact of festivals on the key stakeholders within the live music event.

Alcohol + under-18s

What links London's Marquee Club, Liverpool's Cavern Club, and Sheffield's Club 60? Apart from being three live music venues synonymous with the sixties' 'golden age' of British live music, none of the three sold alcohol because they were unlicensed at the time. What has developed since that time, however, is a business model for live music that, in certain types of venue at least, is seemingly dependent on – or at least closely aligned to – alcohol sales.

72% of respondents to the venue survey feel that they sell more alcoholic drinks when live music is on while only 10% say that they sell fewer alcoholic drinks.[84] (Note that some respondents pointed out that this increase is due to the increased number of people attending the venue when live music is on.)

However, 20% of those venues which responded to the online venue survey are not open to under-18s or are only open with some exceptions,[85] suggesting that one in five venues are mostly inaccessible to under-18s, the next generation of live music fans and artists.[lviii] As the following respondent explains:

[lviii] It is worth noting that UK Music runs a Music Futures Group which includes young professionals from all parts of the sector. As part of their

We allow under-18s in up to 7pm. After that time, it becomes very difficult to police and they don't spend any money. We're a struggling business and can't afford or justify the extra work in supplying free water and 'policing' of under-18s.

Small music venue, North West, hosting/promoting live music for 10-20 years.

At Venues Day 2015, 2016 and 2017 there was discussion around dwindling audience numbers, particularly within the younger end of the market. What was apparent is how difficult it is for venues to put on gigs for under-18s due to the licensing conditions imposed on some venues and fear about consequences should anything go awry at the gig. This suggests that licensing may be having a ‘chilling effect’ on the provision of live music events for under-18s in some venues, as suggested by the following musician:

Under-18s are severely let down by licensing laws in many venues. This has stifled the chances for many musicians, including myself (11pm rather than 7pm for instance).

Male semi-professional indie guitarist, 18-19 years-old, South East.

Recommendation 13. We *recommend* that local authority and police licensing boards ensure that

communications to the UK Music board the Group recommended that work be undertaken to make more gigs available to under-18s as they highlighted a problem for up-and-coming young artists whose target audience aren’t able to attend live shows (Hill 2018).

licensing restrictions do not overly inhibit venues' ability to host live music events for under-18s.[lix]

As discussed later in this chapter, we recommend that venues should also adopt measures and develop policies for child protection, etc. where appropriate and work with police and licensing boards and/or forums to ensure a safe environment for all their patrons.

According to government figures from 2016, the percentage of adults aged 16 years and above who drank alcohol in the week before being interviewed was the lowest seen since the Office for National Statistics' (ONS) Opinions and Lifestyle Survey began in 2005 (ONS 2017). Most pertinently for the future of live music venues which rely on alcohol sales, the research suggests that young people aged 16 to 24 years in Great Britain are less likely to drink than any other age group.[lx] Research by Eventbrite in 2017 suggests that alcohol consumption is declining in favour of 'wellness' and that 42% of so-called 'millennials' said that they are drinking less alcohol than they were three years ago, with one in four preferring to spend their money on other things, including events and festivals (2017: 17). The same report suggests that getting drunk is not something that 'millennials' regard as something to be proud of as it compromises a key reason for going out in the first place, namely creating memories (ibid: 19).

[lix] For example, one suggestion by a respondent to the venue survey was that local authorities should introduce simpler licensing regulations for live music venues, saying that: 'We are not pubs and should not be regulated as if we are!' (Medium music venue, South West, hosting/promoting live music for more than 30 years).

[lx] As the ONS points out, drinking habits will also be impacted by cultural differences (ONS 2017) and hence data will be influenced by demography, geography and genre.

The following quote from a respondent to the venue survey appears to suggest that alcohol consumption may be declining more broadly:

> *We sell more [alcohol] as live music is the main reason we have customers to start with, although sales are down by approximately 50% compared to 5 or 6 years ago.*
> Small music venue, North West, hosting/promoting live music for 10-20 years.

With this in mind, it appears that the model wherein alcohol sales shore up venues' shortfall may need to change and we make the following two recommendations for further research:

Recommendation 14. We *recommend* further research into the leisure activities of young people, with particular reference to the place of live music therein, be undertaken in order to understand this better.

Recommendation 15. We *recommend* further research into the relationship between alcohol and live music, with an emphasis on young audiences/under-18s.

Funding and governance

It appears that tour support for musicians from the record industry has decreased in the 21st-century and there are some who believe that this shortfall should be covered by public funds and/or by the wider music industries (just as there are some who believe that the so-called commercial sector should not receive any public funds). The UK Live Music Census found that:

- 78% of respondents to the venue online survey do not receive public or charitable funding;[86]
- Of those respondents to the venue online survey that do receive public or charitable funding, 48% receive funding from one of the UK's the four arts councils (England, Wales, Northern Ireland and Creative Scotland), 41% from a local authority/council, 22% from the Big Lottery Fund, and 11% from Youth Music. (Note the low sample size here and standard errors higher than 3%).[87]

As it is unlikely that the public funding situation will improve in the near future, it has been suggested by people such as the Music Venue Trust's Mark Davyd that the music industries contribute more towards the smaller sector because, he suggests, the 'grassroots' live music venue sector is 'the R&D arm of the music industries' as this is where new talent is spotted.

We too would encourage the wider music industries (including recording and publishing) to support musicians and smaller venues beyond the current provision of PRS Foundation and other funders. One suggestion, drawing on a model adopted in countries such as France, is the introduction of a levy on tickets which would then be distributed to smaller venues and tours to help redistribute funds to those venues who support artists in their early careers.

With the above findings in mind, and also based on the later suggestions from venues and promoters in Chapter 7 of this report, we make the following recommendations:

Recommendation 16. We *recommend* that local and national administrations encourage more extensive funding for emerging artists, venue infrastructure, tour support and rehearsal spaces.

Recommendation 17. We *recommend* that the wider music industries discuss the financial sustainability of the smaller venue sector, including innovative funding models, via consultation with bodies such as UK Music's UK Live Music Group.

Recommendation 18. We *recommend* that bodies such as the Music Venue Trust should continue to encourage the wider music industries (including recording and publishing, possibly via the UK Music network) to support musicians and smaller venues beyond current support; for example, by subsidising emerging artist fees and/or providing venue infrastructure.

Recommendation 19. We *recommend* that venues and promoters, particularly at the smaller end of the spectrum, examine and, where appropriate, re-evaluate their governance structures and policies as a possible means of being able to access funding.[lxi]

[lxi] For example, Arts Council England specifies that all its funded organisations, individuals and projects that work with children and young people or adults at risk of abuse, are required to have a safeguarding policy in place.

The following excerpt from a profile interview with the Chief Executive of a funded small venue in Manchester highlights some of the difficulties in running a small venue in 2017 but also how having policies in place can have broader implications for a venue's ability to access funding and support from more formalised institutions.

Profile: Gavin Sharp, Chief Executive, Inner City Music (owner/operator of Band on the Wall, Manchester)

Band on the Wall is a very old Manchester music venue; it originally had a licence for music, song and dance in 1806 and has been a registered charity since 1982 … We don't operate the 'normal' business model for UK small venues but it is fairly standard if you look to Europe. The 'normal' business model is that you tend to find a lot of enthusiasts within the small venue sector; quite often musicians who want to stop touring or live music enthusiasts who want to start up their own venue. Little do they know that though the business is small, it is very complex and making a success of it – depending on where you are – can be a challenge. People look upon small music venues as being easy: you put a band on stage and sell beer and tickets … but while it's not a *big* business, it's very *bitty* and very complicated, much more so than they perhaps first thought. It's quite difficult to really control your business; it's not like a café where you can just change the menu if it's not working. The power within the market is with the seller – the agent – and so now we're in a world where you're chasing content. Also, people don't tend to just wander in to music venues to see what's going on any more; they tend to know the artist and they *want* to be there; they are much more active than passive.

> We're on the inner ring road in the Northern Quarter so we *were* right on the edge of the city centre and it was all quite derelict for a long time but now there are flats planned over the road (emphasis in original). We've made Manchester planning department aware of our concerns about having residents too close to us and it helps that we have good relations with the city – we *know* all the councillors, council officers, and planners – and that we get funding from the city; it's always an open dialogue. Other small independent operators often don't have that same mind-set in place, things like setting up an organisation properly, having child protection procedures in place, a neighbourhood relationship policy and an environmental health policy. I personally think that there is a lot to be done in the small venue sector around skills development and knowledge. I am inundated at Venues Day by venues wanting to know how we do what we do – the programme, the funding, the support from the city. It's a way of thinking, a mind-set. There's a lot of capable venue operators out there who could do with some help about things like governance structure, ways of thinking, and best practice … The Arts Council is not going to fund venues unless the structures are in place.

The interview above also shows that even Arts Council England National Portfolio Organisations such as Band on the Wall are not necessarily immune to the issues posed by city centre development. It also highlights some of the pros and cons of funding in that the relative financial stability which funding can offer must be necessarily offset by the additional burden of bureaucracy and all that this entails. Note also that Band On The Wall is somewhat unusual in that it is one of a small number of small music venues which receive regular Arts Council funding and funding from the local authority.

The live music ecology consists of the physical spaces in a locale and the social networks between the key stakeholders – musicians, promoters, etc. – who use such spaces (Behr *et al* 2016). The ecology is also shaped by external constraints such as policy, regulation and access to funding and hence the dynamic human structures that create and implement these constraints also shape the local ecology. A ‘healthy’ live music ecology requires strong networks linking these intrinsic and extrinsic actors in order that good lines of communication are maintained. With this in mind, we make the following recommendation:

Recommendation 20. We *recommend* that venues and other key stakeholders develop relationships within structures such as local authorities and funding bodies, and vice versa.

Ideally, this could involve a local authority establishing a dedicated venue liaison officer, or it could be as straightforward as a venue getting in contact with a local arts council representative or relevant local authority representative to discuss possible options and strategies.

Safe spaces? Issues of gender and security

As seen in Chapter 4, for some respondents to the audience survey, venues are important because they are seen as safe spaces, whether that means somewhere that they can attend on their own, or somewhere that allows them to be openly expressive about their identity. As BBC Radio 1 DJ Steve Lamacq said at Venues Day 2017, every town should have somewhere independent of thought and spirit and that ‘it is critical that we encourage people who go against the grain or experiment or provide an alternative, that we give them a space’.

However, it was clear from Venues Day 2017 that there is still much to be done to address sexual harassment and assault at gigs, also suggested by the emergence in recent years of campaign groups like Girls Against and Safe Gigs for Women. Venues and festivals can be clear about what is and is not acceptable behaviour from the outset and artists can use their platform to do likewise. Yet it appears from the census findings that sexual harassment and child protection policies are not yet in place across the board:

- 66% of respondents to the venue survey do not have a sexual harassment policy;[88] and
- 87% of respondents to the promoter survey do not have a sexual harassment policy.[89]

While

- 63% of respondents to the venue survey do not have a child protection policy;[90] and
- 75% of respondents to the promoter survey do not have a child protection policy.[91]

Safe spaces are not just about sexual harassment, however. The horrific terrorist incidents at Manchester Arena, Las Vegas’s Route 91 Harvest Festival and the Paris Bataclan led the UK’s Minister of State for Security to say that event staff are ‘at the vanguard of counter-terrorism’ (Chapple 2017). However, best practice for safety at smaller music venues in particular is still in its infancy and it seems that more needs to be done to improve the safety of live music events.

It is perhaps telling that in research by TheTicketingBusiness in June 2017 found that 78% of respondents said they refused to be scared about attending live events, 55% of those surveyed said they are unwilling to give up live music and 36% said they still believe live music events and festivals are safe, perhaps suggesting that over half think that they are *not* safe (TheTicketingBusiness 2017).

With this in mind, we make the following recommendation:

Recommendation 21. We *recommend* that venues and promoters adopt measures and develop policies where appropriate so that live music can be enjoyed in a safe space, such as child protection, sexual harassment, environmental health, etc.

The above section has shown in in particular the smaller end of the live music sector in the UK appears to be facing a number of challenges, from property development and noise complaints to diminishing audiences, and from a lack of funding to the need to provide a safe space for their customers. The following sections on promoters and musicians will examine some of the challenges faced by other key stakeholders in the live music event.

Promoters

Any challenges being faced by live music venues do not just affect the venues directly, of course, but also impact on the promoters and musicians who use these spaces, as we now discuss.

Promoters are catalysts who bring together the elements of the live music event: the space or venue, performers, an audience, and appropriate technology to make the event happen (Frith 2012). The promoter of the event may be the venue or even the performers, or it may be an independent individual or company. As well as venues, promoters can become embedded in the local live music ecology: nearly half (47%) of the respondents to the promoter survey have been promoting live music for 10 years or more with 22% promoting for more than 30 years.[92]

As with the venue survey, the census asked promoters to comment on whether certain external factors had negatively impacted on their events in the past 12 months (respondents could select multiple answers). As the chart below shows, 50% of promoters said that the cost of paying bands had an extreme, strong or moderate negative impact on their events in the past 12 months (see earlier comment in challenges to venues section on the cost of paying bands), 42% were negatively impacted by diminishing audiences, while 38% cited the increasingly competitive environment between venues and promoters as having negatively impacted on their events.[93]

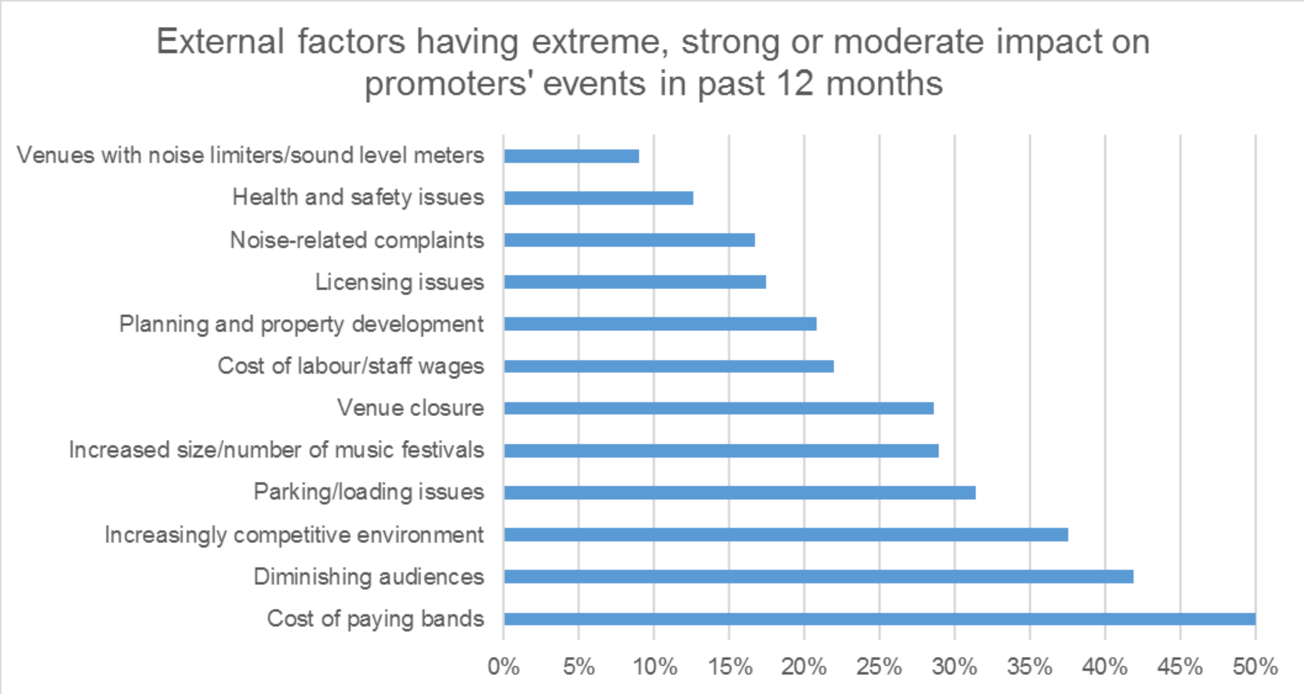

Figure 37: External factors having extreme, strong or moderate impact on respondents to the promoter survey's events in past 12 months

This quote from a respondent to the promoter survey illustrates some of the challenges within the sector:

> *From a personal perspective, my current promoting level is unsustainable. I have a busy day job, but am passionate about keeping the scene going. However, in real terms I have just a few long term helpers, no financial reward, and it's a permanent battle to keep people happy, respond to emails, engage audiences, advertisers, venues, and balance the books. On the plus side, I LOVE the gigs, the music, the audiences, and the musicians. This is what keeps me going.*
> Local jazz promoter, Yorkshire and Humber, promoting for 10-20 years.

As the chart above also shows, nearly a third (29%) of respondents to the promoter survey said that venue closure had an extreme, strong or moderate negative impact on their events in the last 12 months.[94] As the following respondent to the promoter survey explains:

> *The loss of pub rooms has had a huge impact on the folk music sector.*
> Local folk music promoter, West Midlands, promoting for more than 30 years.

As well as answering multiple choice questions, promoters were also asked open-ended questions about their barriers to success, which have been coded and transformed into percentage figures. When asked to describe the most significant problems that they have faced as a live music promoter, one third (34%) of respondents to the promoter survey mentioned venues.[95] Problems include a lack of suitable venues, cost of venues, venues closing down or a lack of suitable infrastructure within the venue itself. For example:

> *Local amateur orchestras struggle to find suitable venues for concerts. We mostly end up in churches. It would be nice if there was a small concert hall we could hire for an affordable price.*
> Female amateur classical brass player, 55-59 years-old, Scotland.

44% of promoters who responded to a question about the barriers to putting on live music in their locale mentioned venues. Problems and barriers included a lack of venues, cost of venues, and lack of suitable infrastructure within the venue itself.[96] As another example:

> *The most significant problems have been the closure of venues and the lack of infrastructure at the venues we sometimes use. This can be often be from not having a*

functioning PA (or even one at all) which means we have to hire a PA and soundsystem from outside the venue, costing us money we could pay the bands. Due to this we put on less shows due to there being more risk.
Regional promoter, South East, promoting for 5-10 years.

Again, it appears that while other problems such as the cost of paying bands and diminishing audiences are problematic, the open-ended responses reveal that a lack of suitable venues is a significant factor impacting on promoters' live music events.

Musicians

Challenges within the wider live music ecology also impact on musicians, of course. The following quote from a musician sums up some of the issues:

I think the effect of austerity measures, combined with rising prices and the severity of lower earning potential in poorer areas, are devastating across all aspects of life, including most noticeably, live music employment opportunities. Where once there were regular paid support opportunities for tours and paid appearances at festivals, these are now fewer and often offered on a no fee basis at best.
Male semi-professional singer-songwriter and guitarist, 50-54 years old, West Midlands.

As with the respondents to the venue and promoter surveys, respondents to the musician survey were also asked about various external factors which had impacted on their events in the past 12 months. As the chart below shows, 65% of all respondents to the musician survey said that a lack of suitable venues had an extreme, strong or moderate negative impact on their career development.[97] For instance, as the following musician explains:

> *I've lived in London for 30 years. Over that time I've seen the number of small and medium size venues diminish alarmingly. The 'Grass Roots' venues that support the whole industry are just not there in the same way anymore.*
>
> Male professional jazz woodwind player, 60-64 years-old, London.

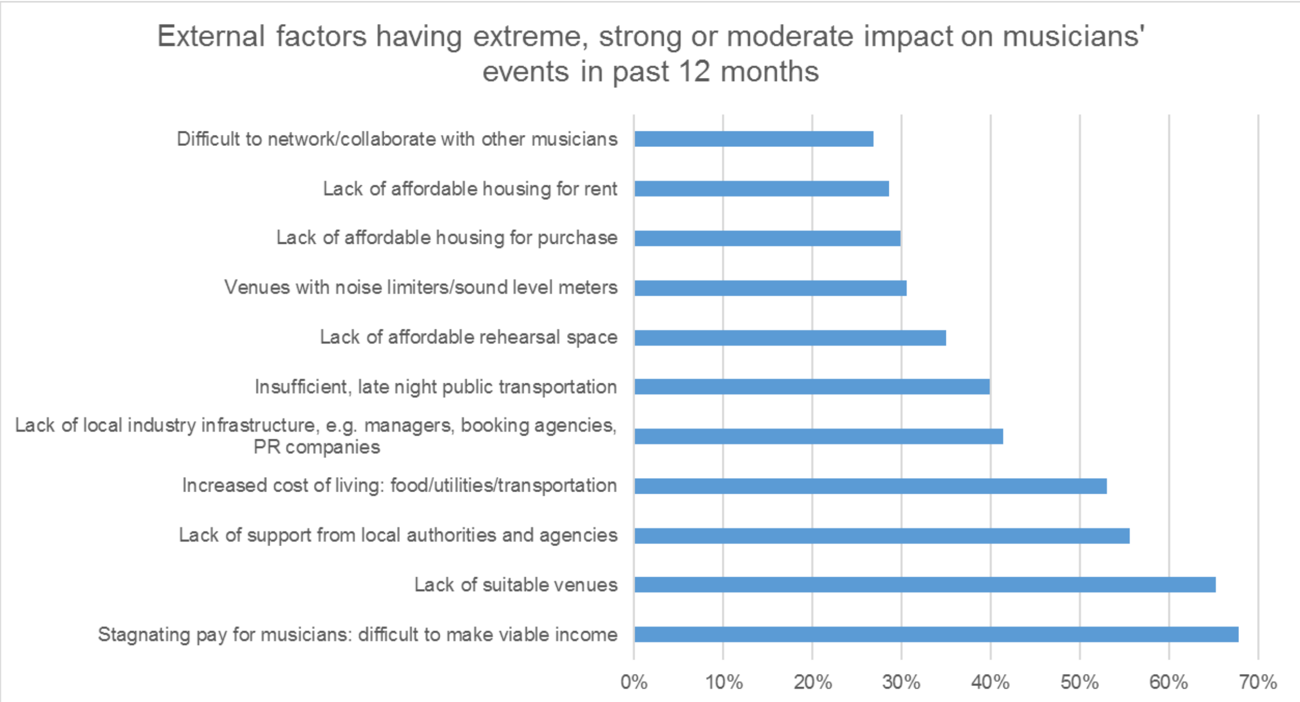

Figure 38: External factors having extreme, strong or moderate impact on respondents to the musician survey's events in past 12 months

68% of all respondents to the musician survey said that stagnating pay for musicians makes it difficult to bring in a viable income.[98] This rises to 80% of respondents to the musician survey who identify as professional musicians.[99] Competition within the sector can be an issue, as the following musician suggests:

> *Sometimes I feel undercut by other musicians. Bars will say you're charging £80 for two hours? We have TWO guys that come in and do it for £75.*
> Male professional pop guitarist, 20-24 years-old, Scotland.

As was seen earlier in this chapter, the cost of paying bands is something highlighted by respondents to the venues and promoter survey as having a negative impact on *their* events, thus highlighting the tensions that can exist between the different stakeholders in the event around money in particular.

Similarly, some of the issues impacting on venues also impact on musicians, although to a lesser extent, perhaps.[100]

- 37% of all respondents to the musician survey had gigs which were negatively affected by diminishing audiences in the past 12 months;
- 27% of all respondents to the musician survey had parking issues in the last 12 months which negatively affected their gigs;
- 22% of all respondents to the musician survey had gigs which were affected by noise-related complaints in the last 12 months.

To address the issue of parking we make the following recommendation:

Recommendation 22. We *recommend* that local authorities introduce free or subsidised parking permits for load-ins and load-outs at pre-agreed

venues to address issues around parking for musicians.[lxii]

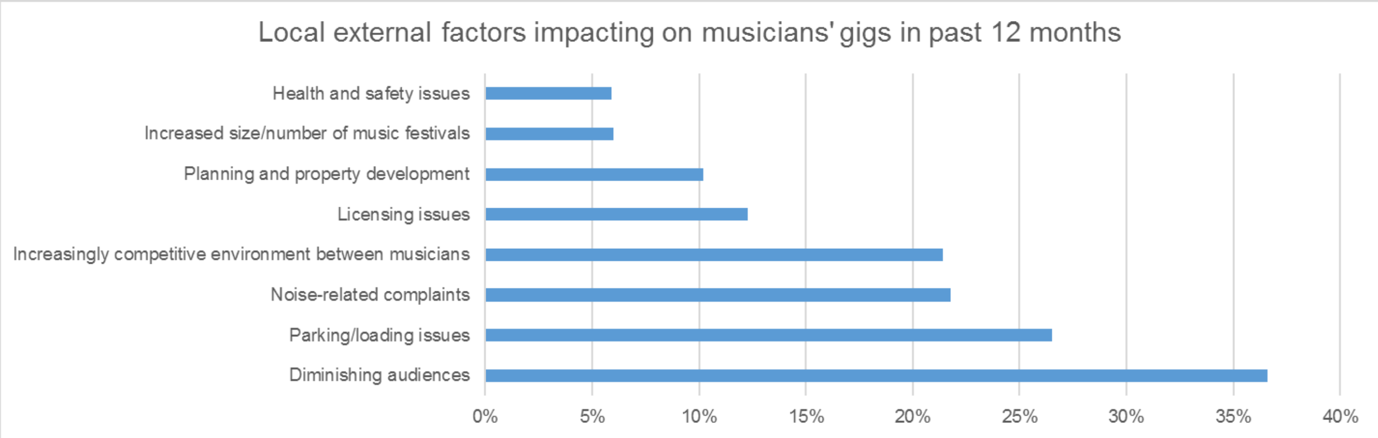

Figure 39: Local external factors impacting on respondents to the musician survey's gigs in past 12 months

As well as the external factors examined above, the UK Live Music Census looked at other challenges to musicians, which include playing for free and the difficulties in finding opportunities to perform original music, as we now discuss.

Playing for free

Whether amateur or professional, musicians often play for free, sometimes to further their career, sometimes for a good cause, or sometimes simply for pleasure. However, the line between opportunity and exploitation is routinely blurred.

Over two-thirds (69%) of all respondents to the musician survey have worked unpaid in the past 12 months.[101] Over

[lxii] This echoes a proposal to the London Mayor’s office in 2017 by the Musicians’ Union, with the support of the London Music Board, to create a pilot scheme to allow musicians and DJs to legally unload and park for the duration of their work engagement (Musicians’ Union 2017). The proposal recommends that the same concession for marked off loading bays for high street stores and retailers should be afforded to musicians outside music venues.

half (54%) of respondents to the musician survey who identify as professional musicians have worked unpaid in the past 12 months, while nearly three-quarters (73%) of those identifying as semi-professional have worked unpaid.[102] This echoes research by the Musicians' Union in 2012 which found that 60% of musicians had worked for free in the past 12 months (Musicians' Union 2012).[lxiii]

> *Until you're established it is difficult. How does a person build a live audience when the gigs you can get involve you playing only to the people you already know?*
> Male semi-professional singer/songwriter, 25-29 years-old, North West.

It can be difficult to build an audience for one's music and so it is not surprising perhaps that 22% of respondents to the musician survey identifying as professional musicians who played for free in the past 12 months and gave a reason for doing so were playing to generate further work, i.e. 'exposure', publicity, audience development, or networking.[103] However, two thirds (66%) of respondents to the musician survey who worked unpaid for what the engager termed 'exposure' believe that the exposure did not benefit their career compared to 34% that believe that it did (excluding those who selected 'not sure/don't know').[104]

The chart below shows the kind of deals offered to all respondents to the musician survey identifying as professional/semi-professional and to those identifying as professional/semi-professional classical and rock musicians.[105] It is worth mentioning that there appear to be

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[lxiii] Note that different methodologies were used in both cases therefore the census findings and Musicians' Union findings cannot be directly compared.

differences between genres in terms of musicians being asked to play for free. As can be seen in the chart below, 58% of respondents self-identifying as professional or semi-professional rock musicians have been asked to play for free when performing live in the last twelve months compared to 33% of classical musicians.[106] 38% of respondents self-identifying as professional or semi-professional classical musicians are salaried compared to 7% of rock musicians.

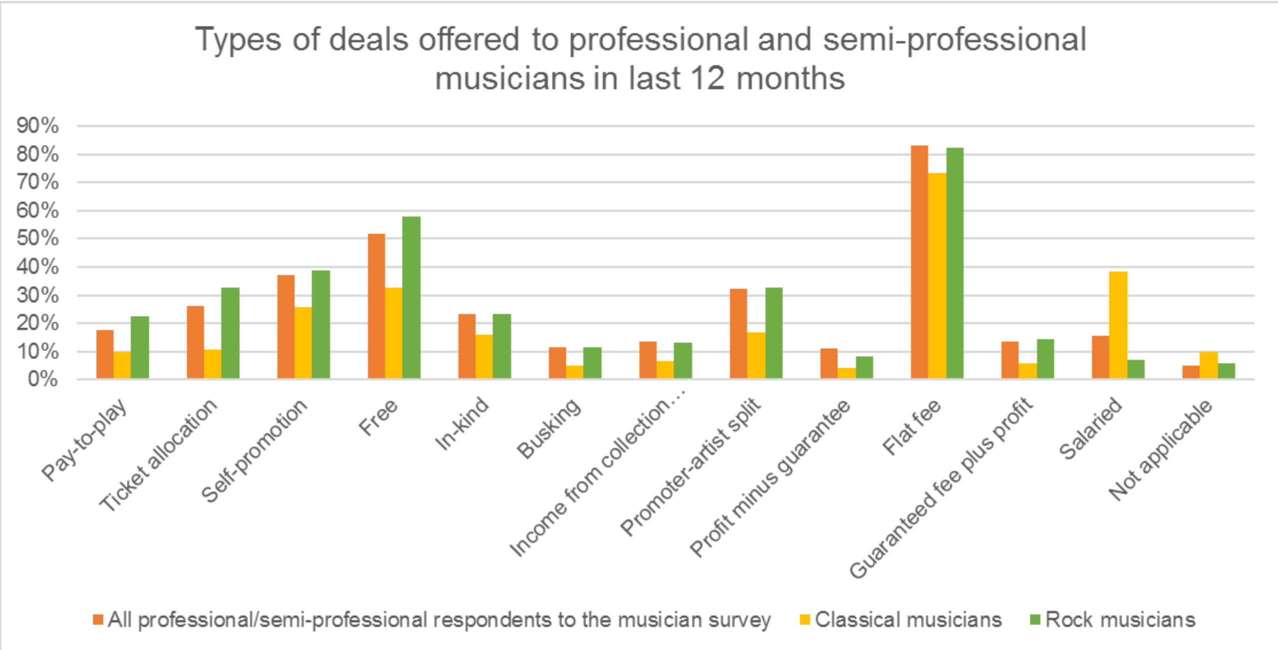

Figure 40: Types of deals offered to professional/semi-professional respondents to the musician survey in last 12 months

As well as paying for free, another more controversial type of deal which can be a challenge for aspiring musicians, is so-called 'pay-to-play' in which musicians pay the promoter to perform. 16% of all respondents to the musician survey have been offered a pay-to-play deal in the past 12 months while this figure rises to 18% for those identifying as professional or semi-professional.[107]

The following excerpt from a profile interview with a London-based grime artist who performs regularly in London and Brighton highlights some of the issues for musicians still at a relatively early stage in their career, particularly around artist pay (emphases in original):

Profile: Razor, Musician, London/Brighton

I describe myself predominantly as a grime MC and I first started gigging six or seven years ago, playing open mic nights and showcases in pubs and bars in London ... In rap music there's a rubbish tendency to pretend that everything's going really well. But I don't know any aspiring musician who is making enough money, or is making a *happy* amount of money … One of my mates is a promoter and I've worked extensively with him. He's given me some great opportunities and I'm very grateful for it but sometimes I have to tell him that he's taking the mickey. He's willing to pay me for the most menial tasks such as scanning tickets or checking coats in at the cloakroom, but as soon as it comes to him actually handing over money simply for me to perform, he becomes reluctant; he wants to talk down the fee to as little as possible. And that's someone I've been friends with for a long time!

Why do I think musicians aren't getting paid? The short answer to that is that someone else will do it for free. Even in my day job, people are really reluctant to pay for people's skills because they see it as something that they can get an intern to do … It's not like you get paid what you want when you've made it, you stop *paying* for the right to *be* here or not when you've made it. The long answer is that, especially with urban music – garage, grime, hip hop, dance – there's a lot of money at the top of the industry but there's not a lot of equality; it doesn't trickle down. You might see a night that costs £10,000 to put on, and the venue makes £3,000 on that night, the promoter makes £3,000 to £4,000, the headliner makes £2,000, and then everybody else involved – including the bar staff and the bouncers and the other support acts – *between* them they don't even make £1,000. It is not that there's not money *there* in the industry but it is generally that the distribution of the money is not great. People are like, 'It's not *fair*!' but I'm like, '*Life's* not fair!'

Funding

Funding for venues – or lack thereof – was addressed earlier in this chapter. The census also asked musicians about funding and the data suggests that 28% of all respondents to the musician survey (or someone with whom they work) have applied for funding or support programmes in the past for the purpose of supporting live music performance.[108]

Out of those who had applied for funding, the chart below shows the funding bodies to which musicians applied and/or were awarded funding from:

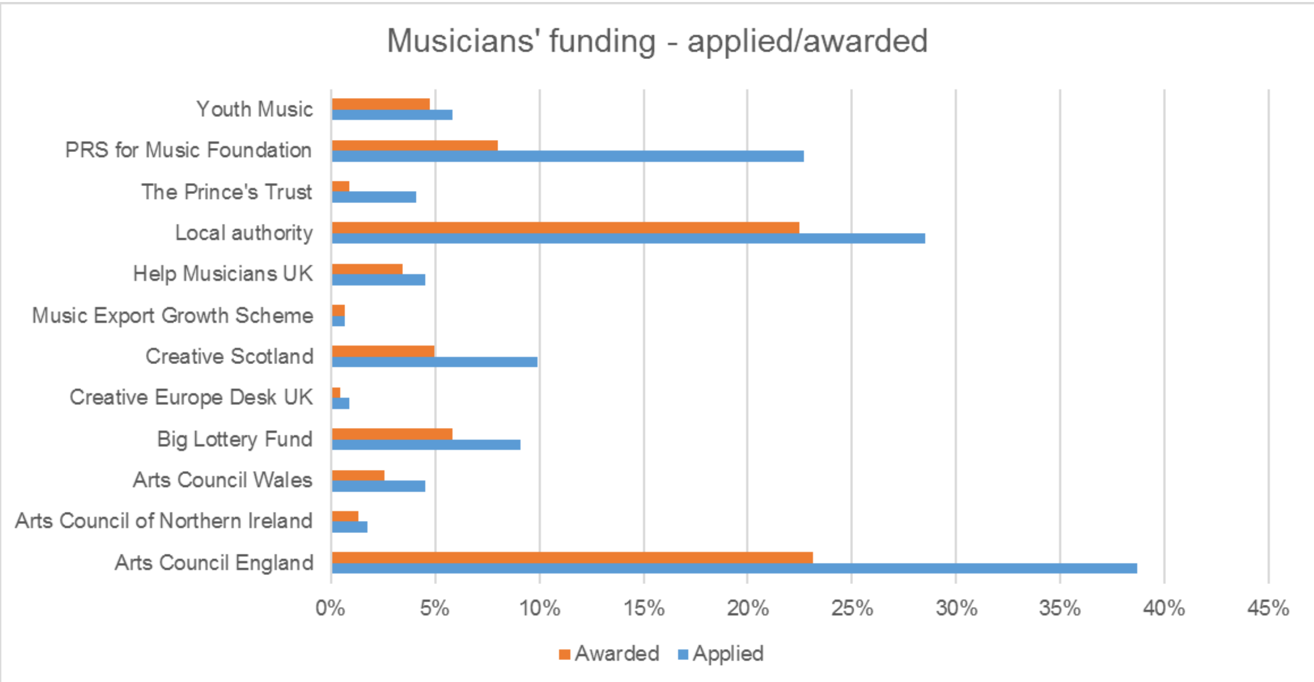

Figure 41: Funding applied/awarded to respondents to the musician survey

As can be seen, out of the respondents to the musician survey who applied or were awarded funding, 39% applied to Arts Council England and 23% were awarded funding, while 29% applied to their local authority/council and 22% were awarded funding.[109]

The chart below suggests that there are differences between genre worlds in terms of funding. It is interesting to note that 49% of all respondents to the musician survey who identify as classical musicians have applied for funding or support programmes for the purpose of supporting live music performance in the past. This compares to 10% of respondents to the musician survey who identify as rock musicians. (The chart below shows the four genres for which more than 100 respondents answered the question.[110])

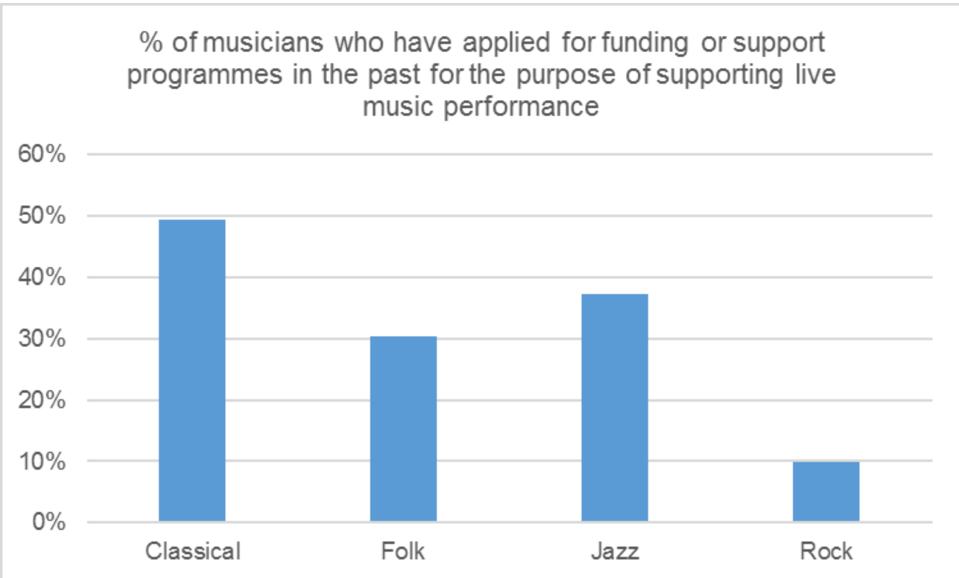

Figure 42: Percentage of respondents to the musician survey who have applied for funding or support programmes in the past for the purpose of supporting live music performance by genre

Public and charitable funding is the lifeblood of a significant amount of live music activity in the UK. As the figures above have indicated for venues and musicians, arts council funding and local authority support is a key part of the live music funding ecology. Rural touring also depends on public funds and funding is part of a ‘cultural ecosystem’ that supports small music ensembles and other artists (Matarasso 2015). Between 2010 and 2015, however, total spending by councils in England on arts and culture decreased from £1.42 billion to £1.2 billion, a 16.6% reduction (Harvey 2016). Research in July-August 2017 for *ArtsProfessional* into the effects of local authority cuts and what should be done about them suggests that local authority funding cuts are affecting around 85% of organisations in the arts sector, and that 69% of arts workers believe that ‘grassroots’ arts activity is suffering the most (Hill 2017).

Performing original music

As well as examining funding sources and the kinds of deals being offered to musicians, the UK Live Music Census sought to illuminate any issues around the performance of original music. When asked why they had performed for free in the previous 12 months, a small number of musicians specifically commented that it is difficult to get paid to play original music and/or that emerging artists often do not get paid. For example:

> *Most pubs and clubs want covers or tribute acts which they see as easy money … The prospects for original music aren't very good.*
> Male semi-professional singer-songwriter and guitarist, 50-54 years-old.

Of course, there are other factors that come into play, as the Musicians' Union's National Organiser, Live Performance Dave Webster explains:

> *Those playing covers will generally be receiving guaranteed fees whereas many original artists at this level will agree to ticket deals, etc. Sometimes those playing original music will accept lower fees in view of additional revenue that they will receive such as royalties and merchandise. It's also worth noting that the same original music that attracts modest fees in small venues can attract much higher fees in bigger venues, and so artists understand that they have to allow their music to grow in value and prove itself to fans, which of course isn't the case with tried and tested covers material.*
> Dave Webster 2018

There is also the question of whether artists who perform original music are paid the same as those who perform covers or composed works.[lxiv] The data appears to suggest that musicians who perform original music are paid less than those who perform covers or composed works, as the following figures show:

[lxiv] The decision to compare those respondents to the musician survey who perform more than 50% and less than 50% original music is necessarily a somewhat arbitrary one but we believe that it gives a useful and quantifiable finding. There is, however, obvious ambiguity here within some genres, such as jazz and folk, as to what counts as 'original' music. The census defined original music as that composed by the respondent and/or other members of their group/ensemble and/or predominantly improvised, compared to music composed by others (e.g. covers or composed works).

- Professional/semi-professional solo singers who perform less than 50% original music in the form of covers or composed works earn a median of £100 per gig, compared to professional/semi-professional solo singers who perform more than 50% original music who earn a median of £75 per gig.[111]
- Professional/semi-professional duo or ensemble players who perform less than 50% original music earn a median of £80 per gig, compared to professional/semi-professional duo or ensemble players who perform more than 50% original music who earn a median of £60 per gig.[112]

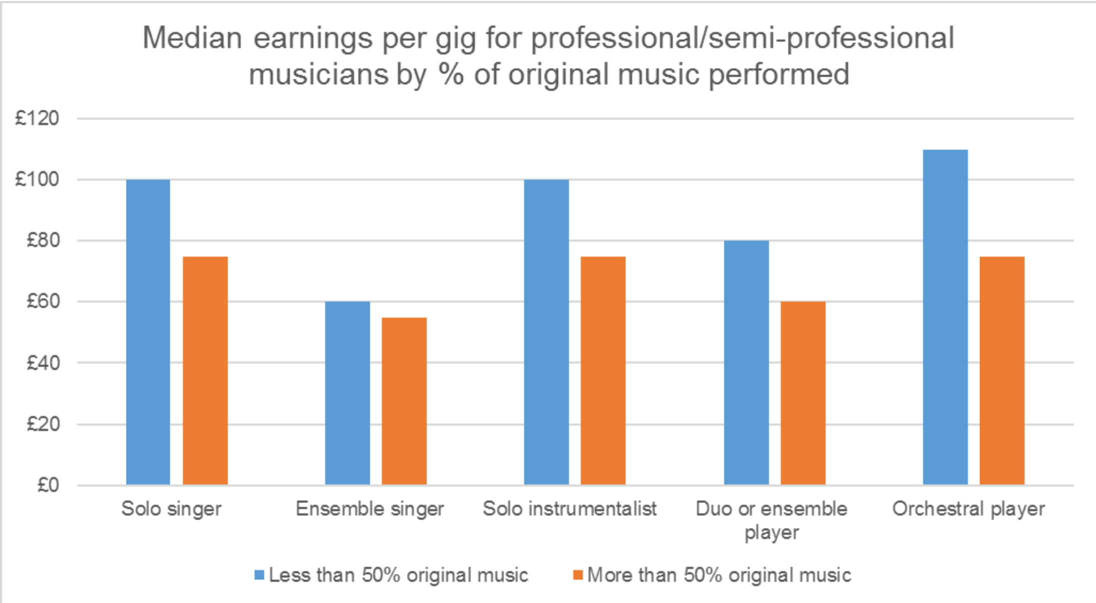

Figure 43: Median earnings per gig for professional/semi-professional respondents to the musician survey by percentage of original music performed

At Venues Day 2017 John Spellar MP suggested that the music industry is 'mining rather than farming our musical heritage' by relying on a great past rather than refreshing the ‘pipeline of talent’. While the above does not comprehensively corroborate Spellar’s statement, it does start to highlight some of the difficulties for musicians who wish to perform original music.

Approaching the issue from a different perspective, the following excerpt from a profile interview with a small music venue worker in Liverpool illuminates some of the difficulties for *venues* in trying to attract customers to gigs in which bands perform original music.

Profile: Joe Maryanji, The Jacaranda, Liverpool

The Jacaranda is a live music venue/rehearsal studio in the basement, a pub on the ground floor, and a vinyl record store/café on the first floor. It opened in 1958, inspired by the 2i's Coffee Bar in London's Soho ... John Lennon and Stuart Sutcliffe started to drink (coffee) at the venue and then started using the downstairs basement as a rehearsal space, which the then-owner Alan Williams allowed them to do in return for painting the toilets (their murals are still on the walls) … Alan actually managed The Beatles in the early 1960s when they were still Long John and the Silver Beetles, so the venue plays a key role in their history … The Jacaranda wasn't doing so well [in the 1990s] and it played a lot on its Beatles heritage. It closed for a few years and then reopened as somewhere which is proud of its heritage – we have Beatles prints on the walls, for instance – but is not *defined* by it (emphasis in original).

The Beatles started out playing covers … and cover versions have always been part of bands' sets … 'Original music' is a bit of a dirty word with some people. I think it's because people that aren't really interested in music think that 'original music' sounds like it's unfinished, like it won't be any good, but to other people it can mean that the music will be interesting and new … I appreciate that it's hard for musicians but in this country there isn't a lot of money in live music and it's difficult for venues to pay. That is, unless you're playing covers, in which case people will pay an arm and a leg … As a venue we encourage people to play 50/50 covers/originals … The Jacaranda is able to take risks on bands and we don't believe in pay-to-play. But it's difficult to put people in front of music that they don't already know these days when they can just discover new music at the click of a button. People don't tend to want to pay to check out new bands so we do free entry shows. But it's often a Catch-22 situation because if the event is free people don't value it as much ... But any change in public attitude has to start at the beginning, at an early age. Music can help to improve mental health, help people to work together, to hold down a job … The government can help music by helping the kids, by educating them. Venues would improve and the UK would have more people working in music.

Developing the next generation of performers and audiences

The final point about education here echoes comments made by Michael Dugher, CEO of UK Music, in 2017. Dugher warned that two issues could cause a 'perfect storm' that would put the UK's £4.1 billion music industries at risk. As well as the closure of hundreds of small music venues, he pointed the finger at the decline in music provision in schools following the introduction of the English Baccalaureate (EBacc) in 2010 – which excludes creative subjects including Music – as a performance measure (UK Music 2017d).[lxv] Commenting, Dugher said:

[lxv] Research by the University of Sussex found that 60% of the state schools in their survey highlighted the EBacc specifically as having a negative impact

> *The combination of these threats has left the UK music industry facing an existential threat. This grim reality potentially puts in jeopardy the UK's ability in the future to generate breakthrough artists that are one of the keys to sustaining Britain's £4.1 billion music industry. It is vital that we rise to this challenge and fight to keep music alive in our schools and battle to save all those music venues that are currently in danger.*
> Ibid.

As already seen in previous chapters, live music venues are key spaces for developing the audiences and performers of the future. Based on Michael's Dugher's comments above and on the later suggestions by respondents to the venue and promoter surveys in Chapter 7, we make the following recommendations:

Recommendation 23. We *recommend* that all levels of government, particularly those with a remit for education, promote music education in schools and encourage live music attendance inside and outside the curriculum.

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on the provision and uptake of Music in their school (within and beyond the curriculum) compared to 3% who said it had had a positive impact, and that the number of schools offering GCSE Music at the start of the 2016/17 academic year was 79% (down from 85% in 2012/13) (Daubney and Mackrill 2017). A survey by the BBC in January 2018 of more than 1,200 schools found that nine out of ten schools had cut back on at least creative subject, including Music, and that most of them blamed funding cuts and the emphasis on core 'academic' subjects as a result of the introduction of the EBacc for these cuts (Jeffreys 2018). The results of the survey has lead the Musicians' Union to call for a review of the government's education policies to ensure that young people are able to access music as part of the school curriculum (Cooke 2018a).

Recommendation 24. We *recommend* that local authorities encourage links between education communities and local live music venues and promoters.

Recommendation 25. We *recommend* that the music industries and government continue to support the work of bodies such as UK Music and its members in linking industry and education.

With the challenges identified above in mind, Chapter 7 will now examine some of the ways that the government could help the sector, as suggested by those who work within it.

Chapter 7: Suggestions from respondents to the venue and promoter surveys as to how the government could improve the live music scene

The previous chapters have explored the value of live music and also examined the challenges currently facing the sector. The venue and promoter surveys asked respondents about what the (local, national and/or UK) government could do to improve the live music scene either locally or at a national level. Note that the figures below are based on self-selected issues to an open-ended question. Therefore the fact that, say, a quarter of respondents mention funding suggests that this figure is more salient than it might suggest at first glance.

Suggestions from respondents to the venue survey

Based on open-ended responses, suggestions from respondents to the venue survey are included below:[113]

- 24% mentioned funding and/or financial support;
- 22% of respondents suggested that the government should introduce the ‘Agent of Change’ principle, consider venues in planning decisions and/or protect venues in the face of noise complaints;[lxvi]

[lxvi] As noted earlier, in 2017 the Welsh Government and the Mayor of London both pledged to adopt the principle in their planning policies (Welsh Government 2017; Greater London Authority 2017) and in January 2018 the Ministry of Housing, Communities & Local Government announced that it will add the 'Agent of Change' principle to the National Planning Policy Framework for England (Ministry of Housing, Communities & Local Government 2018).

- 18% of respondents suggested a review of business rates and/or tax breaks such as a VAT exemption or a discount on ticket sales for smaller venues;
- 9% of respondents suggested that the government review the system by which PRS for Music collects and distributes royalties to musicians, particularly for smaller venues.[lxvii]

Suggestions for funding by respondents to the venue survey included the following:

- Provide funding for infrastructure and technology improvements, including equipment hire;
- Provide more widespread and accessible funding for the arts;
- Remodel funding priorities towards emerging and/or disadvantaged artists, not just larger companies and venues;
- Subsidise artist fees for small venues;
- Support venues to put on emerging artists;
- Provide tour support for emerging artists.

Suggestions from respondents to the promoter survey

Highlighting some of the issues addressed in previous chapters, the responses from promoters were mostly focused around venues, funding and education:[114]

- 42% of promoters who responded to a question about what the (local, national and/or UK) government could do

[lxvii] PRS for Music is a collecting society which amalgamates the Mechanical-Copyright Protection Society and the Performing Right Society and collects royalties for composers via licensing music usage.

to improve the live music scene mentioned venues. For example:

Implement the 'Agent of Change' scheme, whereby existing live music venues should not be threatened by closure because of new residential developments and vice versa ... Also single or minor complaints to the local authorities should not be an excuse for closing down a venue.
Local promoter, South West, promoting for 5-10 years;

- 37% mentioned funding or grants; and
- 16% mentioned schools or education.

Based on open-ended responses, suggestions from respondents to the promoter survey included:[115]

- Provide funding for venues to improve infrastructure and tour support for artists and promoters;
- Help to prevent venue closures from property development and noise complaints;
- Relax licensing laws to allow under-18s to access to live music;
- Provide advertising space and help with publicity;
- Reduce business rates for live venues;
- Encourage music and arts education at school; and
- Acknowledge the significant contribution that music makes to the economy and to national identity.

Suggestions for funding in particular by respondents to the promoter survey included the following:

- Provide funding for smaller venues and promoters including venue infrastructure and practice rooms via, for example, Enterprise Music Scotland;

- Provide tour support for live music artists and companies, including world tours and showcases;
- Provide funding for new businesses/start-ups;
- Subsidise emerging artist fees;
- Provide funding for music hubs to improve access to live music for young people;
- Provide funding for festivals for production workers and training schemes for young people;
- Provide grants for venues to put on original music;
- Enable more affordable hire fees for local authority-owned buildings and/or free use of council resources such as parks;
- Provide accessible funding for volunteer/amateur promoters;
- Provide assistance with advertising;
- Implement a levy on tickets at large venues which would be distributed to smaller venues.

The following excerpt from a profile interview by a small music venue worker illustrates how threats to live music venues can galvanise both the live music community and local politicians, argues the case for the 'Agent of Change' principle, and further illustrates some of the ways in which live music venues have value.

Profile: Guto Brychan, Chief Executive, Clwb Ifor Bach, Cardiff

We have two live rooms, one 150 capacity and one 250 capacity; we're usually on bands' first 'proper' tour ... Over the years lots of bands have played at the venue, including Coldplay, The Strokes, The Killers and Kasabian … We are located on Womanby Street in Cardiff and at the start of the year there were five venues on the street putting on live music until in a short space of time three closed down. And then the pub across the road wanted to put a planning application in to become a hotel and there was a separate planning application to turn the derelict building next door into residential properties … It was quite fortuitous timing because it was just before the council and general elections in 2017 so it became a very hot topic in terms of the local council elections. We did a rally and we had the leaders of Labour, Plaid Cymru and the Liberal Democrats speaking and a lot of promises were made by both local councillors and politicians at the more national level. Out of that has come the fact that the Welsh government has pushed forward with adopting the ‘Agent of Change’ principle within the planning law ... The main thing from our point of view is that [the council has] announced their intention to buy the building next door and lease it to us on a long-term basis to allow us to develop it and create a bigger venue. It’s also got rid of the threat of development of the building next door because the building has been derelict ever since I can remember … The campaign worked really well and the local council is now very supportive and see music as something which brings jobs and tourism into the city … Now we have a stronger relationship with them, to the point where they have appointed a go-between to liaise between venues and officials. It’s getting venues in other cities to do that as well so that they don’t feel that they’re operating in isolation.

We employ nearly 10 full-time staff, another 40 part-time staff, and 10 self-employed sound engineers, before you count the security company that we employ. Then there’s the artists and promoters, so there’s a lot of money flowing through. Our turnover last year was healthy if you’re looking at it from the economic point of view, and also the impact on music tourism. 40-50% of our audience live within 2-3 miles of the venue but the rest travel in to Cardiff from up to 40 miles away ... People stay in hotels, go out for food in town, and you multiply that by when Coldplay play in the Millennium Stadium and you're talking millions of pounds. But you don't get to the Millennium Stadium level without doing the small gigs.

These chapters have attempted to give a picture of the value of live music, the challenges facing the sector across the UK as a whole, and some possible solutions. Chapter 8 will focus in on three snapshot cities of Glasgow, Newcastle-Gateshead and Oxford, to examine some of these ideas and themes at a more localised level.

Chapter 8: Snapshots of live music census cities

In March 2017 members of the UK Live Music Census team co-ordinated live music censuses in Glasgow, Newcastle-Gateshead and Oxford. Live music censuses were also organised in March 2017 in Leeds, Liverpool and Brighton by affiliates (and in Liverpool in June).[lxviii]

The next section of the report will focus in on the three primary snapshot cities to examine some of the ideas already covered in the report at a more localised level. These are: economic value of live music, types of spaces for live music, local challenges for venues, length of time respondents to the venue survey have been operating, types of event attended by respondents to the online audience survey, frequency of attendance, and data about the snapshot census date including estimated audience size, information gathering, distance travelled and type of transport used. Where possible, snapshot city data has been compared in relation to the UK-wide census data as a whole. The quotes from people working in live music in the cities highlight some of the challenges being faced and also some of the ideas around cultural value. Note that the estimates of economic value are based on all venue types

[lxviii] While the affiliates' invaluable data feeds into the national statistics, for the purposes of this report we have focused on the material gathered by the central research team in Glasgow, Newcastle-Gateshead and Oxford because this fulfils the remit of our original application to the Arts and Humanities Research Council. Analysis of the Liverpool data has been carried out by Master's students at the University of Liverpool and is available from the project website (Flynn *et al* 2018).

including those whose primary purpose may not be music related.

Glasgow

A UNESCO City of Music, Glasgow today hosts a veritable musical smorgasbord of live music. Volunteers took to the live music venues of Glasgow for 24 hours on Thursday 9th March 2017 to collect data about the gigs and concerts taking place around the city, and about the audiences who were out and about over that period. Over the 24 hours we found live music events featuring salsa, jazz, classical, 'new music', karaoke, dance music, rock, pop, folk, traditional and much more besides. For example, our volunteers attended a youth theatre production of *Fame* at Platform, a concert of Elgar's music at the City Halls, jazz at Dukes Bar, rock at Nice N Sleazy and the ABC, and Nicola Benedetti and the Royal Scottish National Orchestra at the Glasgow Royal Concert Hall. It is perhaps not surprising that the four words used most often by respondents to the online audience survey to describe live music in Glasgow are *varied*, *vibrant*, *quality*, and *plentiful*.

Economic value

The estimated total annual spend on live music in Glasgow is £78.8 million.[lxix] This works out to an estimated equivalent

[lxix] See the economic methodology section on p. 13 for an explanation of how these figures were calculated. The annual spend figures are based on information on the spend by respondents on the snapshot census date on seven expenditure items: local transport, food/drink at the venue, food/drink external to the venue, merchandise, accommodation, ticket price and other (unspecified) spend, and hence are not limited purely to direct spend associated with live music.

GVA of £36.5 million and supports an estimated 2,450 FTE jobs based on all types of spaces where live music is played, including those for those whose primary purpose may not be music related.[lxx]

Types of spaces for live music

As of March 2017, Glasgow had at least 241 spaces where live music is played, for a city population of 593,245 and a greater city region population of 1,804,000 (ONS 2016).

As can be seen in the chart below, 77 of these (32%) are music or arts venues (11% small/medium/large music venues, 4% concert halls, 2% arts centres, 3% theatres/opera houses, 11% small/large nightclubs and 1% arenas), 34% of these are bars or pubs, 12% are 'other'[lxxi] (including university buildings and social clubs) and 8% are churches.

[lxx] The economic contribution of music tourism to Glasgow was estimated in 2015 by UK Music to be £105m sustaining 1,141 full time jobs from 449,000 music tourists (UK Music 2016). A report on growing the value for music tourism in Glasgow, published in January 2018, suggests that this figure underestimates the contribution of smaller venues and suggests that the total value contributed by live music attendance in Glasgow is £159.7M (Perman *et al* 2018: 4). The same report examines perceptions of Glasgow's musical culture, the city's assets, constraints, opportunities for growth and potential interventions, and makes recommendations to enhance Glasgow's reputation and increase visitor numbers and spend (ibid: 4-5).

[lxxi] 'Other' here includes student unions, social clubs, and village halls (see Appendix 2: Definitions). This venue typology has been updated since the March 2017 census so that student unions and social clubs/village halls are now separate categories. See http://uklivemusiccensus.org/#glossary

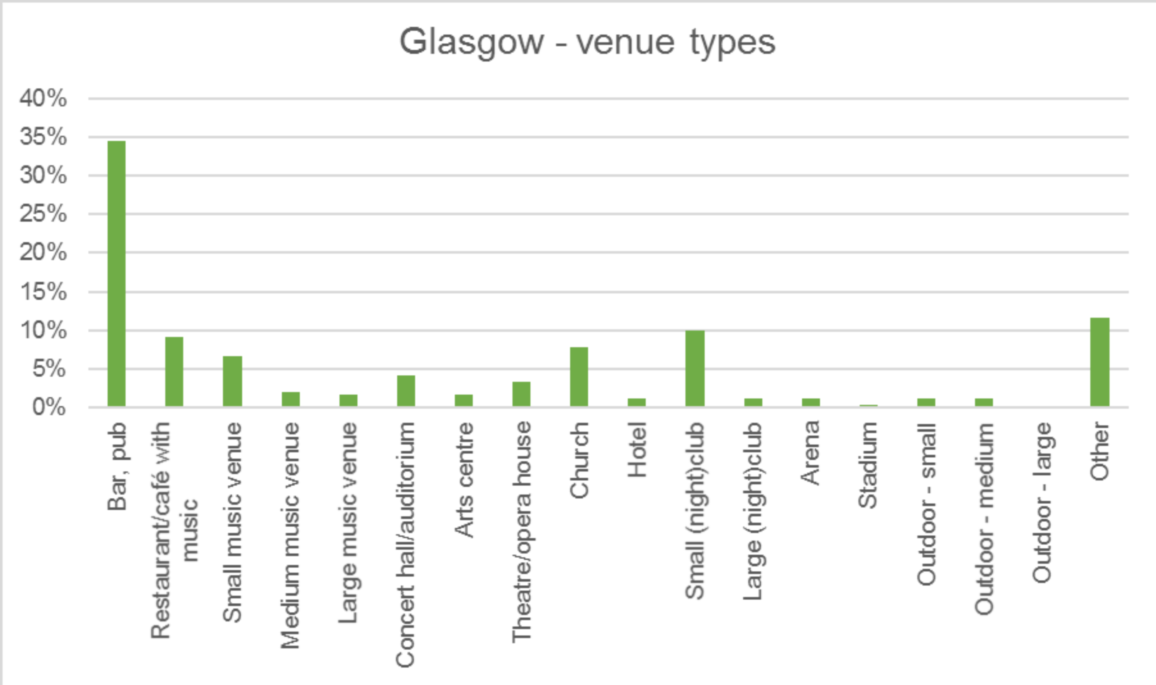

Figure 44: Types of spaces for live music in Glasgow

Local challenges for venues

Nonetheless, while Glasgow has a large number and wide variety of venues types, the city's venues are facing challenges. As can be seen from the chart below, 36% of respondents to the online venue survey in Glasgow said that the increasingly competitive environment between venues and promoters had an extreme, strong or moderate negative impact on their live music events over the past 12 months.[116] 34% cited increased business rates, 31% cited the increased size/number of music festivals, and 29% said that diminishing audiences have negatively impacted on their events in the past 12 months.

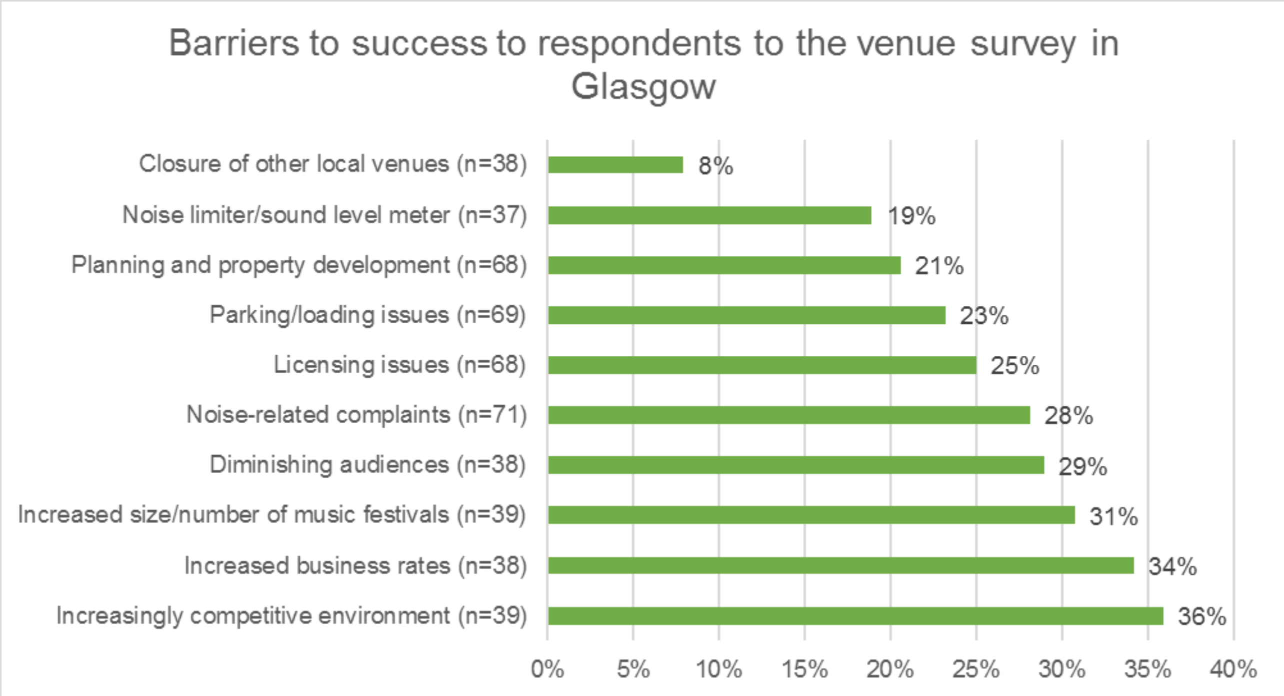

Figure 45: Barriers to success to respondents to the venue survey in Glasgow

The following excerpt from a profile interview with the venue manager of a small music venue in Glasgow gives his thoughts about what he perceives as an increasingly competitive environment in the city.

Profile: Chris Cusack, Events/Venue Manager, BLOC+, Glasgow

BLOC+ is a 183-capacity venue just off Sauchiehall Street in Glasgow that started 17 years ago. It is a basement bar and is totally independent.

Glasgow's in a funny situation in terms of promotions and live events. It's a relatively small city and for the number of places it has it's very oversaturated, I think. Not just in terms of venues but in terms of larger promoters as well. I don't think that there are many places that are quite so dog-eat-dog … At one point on Sauchiehall Street, which is the main drinking street, there were around 13 venues on one street. I wouldn't say that there were far too many because it's great to have so much music, but the crowd and the audience were stretched really thin; there was a kind of supply and demand issue … Competition is healthy but there is a point where competition starts to affect the stability of the environment in which you're operating.

Managers and promoters are always horse-trading small acts against bigger acts to curry favour with the agents … [They put on a small band in order to get access to the bigger bands.] But the bigger promoters can absorb any losses on smaller acts whereas smaller venues then don't get access to the smaller bands who are breaking through … I think it's more ruthless than it used to be. One of the new innovations has been that the promotion agencies own their own small venues as well to minimise their losses. In Glasgow, most of the big promotion agencies have their own venue, which allows them to engage in those practices. With their own venue then they may lose on the fee but they'll make some money back on the bar. There are a number of venues in the city now which are ostensibly small venues but are really just branches of much bigger companies that are putting on arena shows and that are using those small venues to do favours for booking agents who represent bigger acts. [But] there's quite a strong network of people working in independent venues in Glasgow who have respect and good lines of communication with each other … Members of staff also DJ in each other's venues and it's fostered a bit of a unionisation sort of approach; we are trying to stay competitive with these bigger promoters that are using the smaller venues.

Length of time venues have been operating

The chart below shows the length of time that respondents to the venue survey have been hosting/promoting music in Glasgow compared to all respondents to the venue survey. 58% of respondents to the venue survey in Glasgow have been operating as a space for live music for more than 10 years while 21% have been open for more than 30 years.[117]

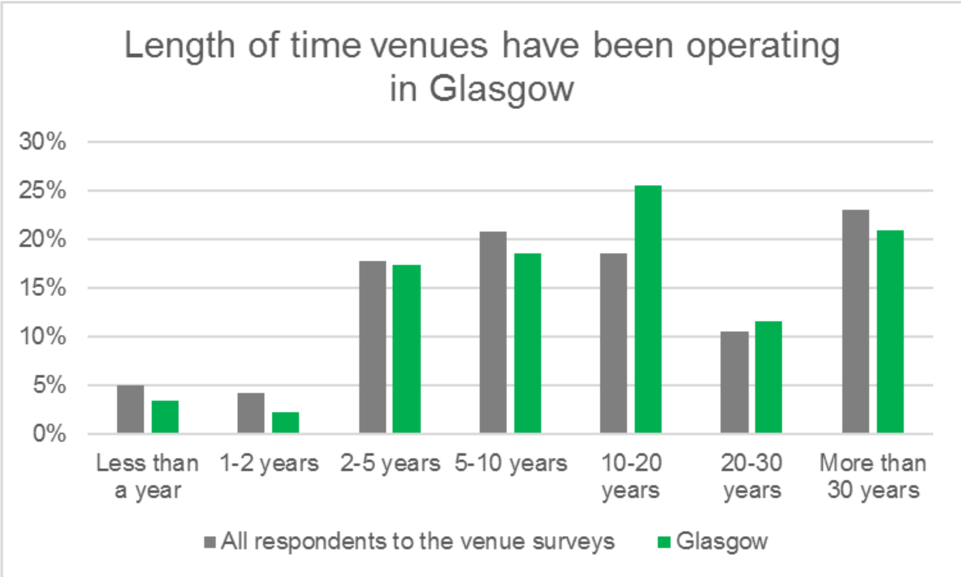

Figure 46: Length of time respondents to the venue survey have been operating in Glasgow

Types of live music events attended by genre by respondents to the audience online survey

The census asked audiences in Glasgow to select genres that best describe the types of live music event they had attended over the past 12 months. The following chart shows this data in relation to UK data as a whole and appears to show that Glaswegian audiences attended slightly more classical, dance/electronic, indie, and traditional Scottish/Irish events in the past 12 months than respondents to the audience survey as a whole.[118]

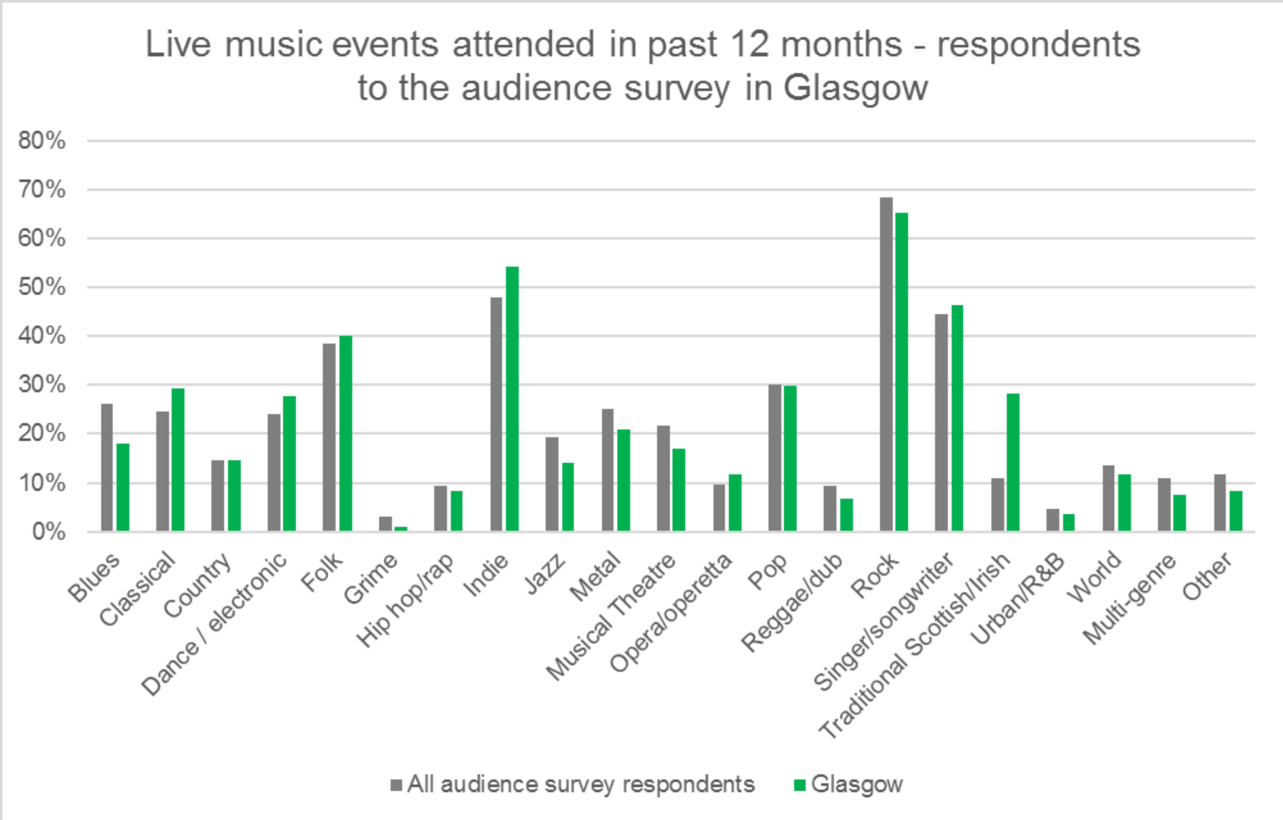

Figure 47: Live music events attended in past 12 months by respondents to the audience survey in Glasgow

Audience frequency of attendance

Audiences in Glasgow were asked how often on average they attend live music events each month. As the chart below shows, 63% attend at least one ticketed and 26% at least one free concert and theatre venue or festival event per month. 63% attend at least one ticketed and 42% at least one free gig, club or small venue event per month.[119] The chart below appears to show that Glaswegian audiences attend slightly more free concerts/theatre venues/festivals and slightly fewer ticketed gigs/clubs/small venues than respondents to the audience survey as a whole.

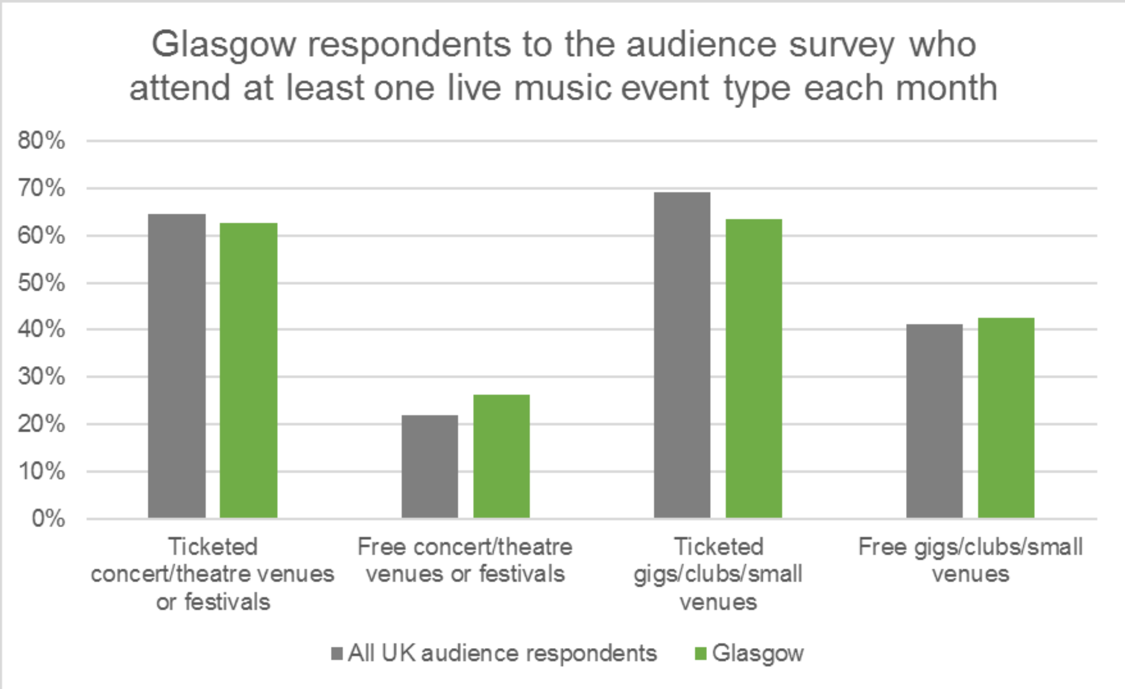

Figure 48: Attendance by respondents to the audience survey in Glasgow who attend at least one live music event each month

Snapshot census date

We estimate that some 10,300 people attended a live music event on 9-10 March 2017 in Glasgow.

To better understand how people find out about the live music events that they attend, audiences in Glasgow were asked how they heard about the event on the snapshot census date. 49% found out about the event via word of mouth and 21% by social media, as can be seen in the chart below.[120] 'Other' included performing at the event, walking in off the street, and that the respondent is a regular at the venue (usually a pub/bar) at which the event was taking place.

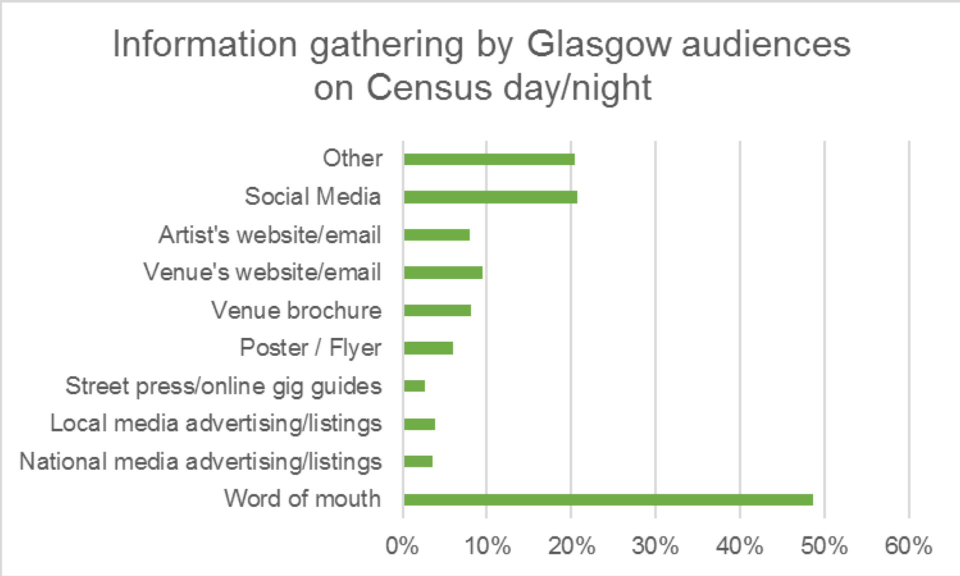

Figure 49: Information gathering by Glasgow audiences on census snapshot date

Volunteers asked respondents to the audience survey in Glasgow how far they had travelled to the event on the snapshot census date. The median distance travelled by audiences was 5 miles and 23% of the audience travelled 20 miles or more (round trip, there and back again).[121]

Respondents were also asked to specify the main form of transport they used to travel to the event on the snapshot census date. 33% travelled on foot, 21% by train, and 19% by car or van, as can be seen in the chart below.[122]

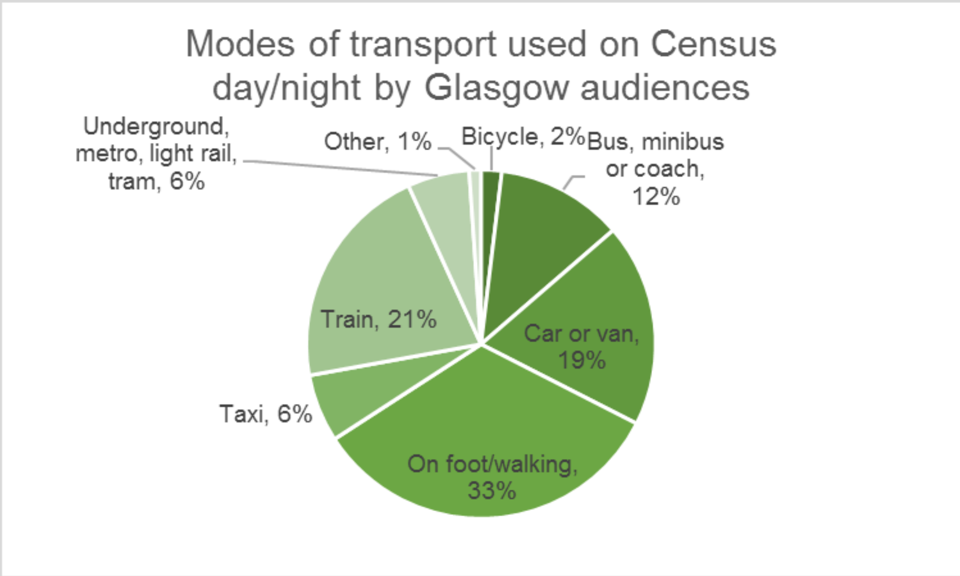

Figure 50: Modes of transport used by Glasgow audiences on census snapshot date

Newcastle-Gateshead

Newcastle and Gateshead are both places with strong musical heritages – particularly in terms of folk and jazz – enhanced in 2004 with the opening of Sage Gateshead, a purpose-built music venue with a laudably diverse programme, from rock to jazz to folk to classical. Newcastle also hosts big name acts at the Metro Arena and O_2 Academy, while the many pubs and smaller venues and clubs in the two locales offer a wide variety of live music., From the music of Otis Redding at Sage Gateshead to the Gerry Richardson Quartet at the Jazz Café, from Million Dollar Quartet at the Theatre Royal to James Arthur at the O_2 Academy, and from a Battle of the Bands competition at Trillians to a buskers night at the Bay Horse, volunteers found a great diversity of music on the snapshot census date. The four words used most often by respondents to the online audience survey to describe live music in Newcastle-Gateshead were *varied*, *exciting*, *vibrant*, and *diverse.*

Economic value

The estimated total annual spend on live music in Newcastle-Gateshead is £43.6 million. This works out to an estimated equivalent GVA of £19.9 million and supports an estimated 1,620 FTE jobs based on all types of spaces where live music is played, including those for those whose primary purpose may not be music related.

Types of spaces for live music

As of March 2017, Newcastle-Gateshead had at least 137 spaces where live music is played, for a combined population of 480,400 and an estimated North East city region population of 1,957,000 (ONS 2016).

As can be seen in the chart below, 38 of these (28%) are music or arts venues (10% small/medium/large music venues, 4% concert halls, 4% arts centres, 3% theatres/opera houses, 7% small/large nightclubs and 1% arenas). 36% are bars or pubs, 21% are 'other' (including university buildings and social clubs) and 5% are churches.

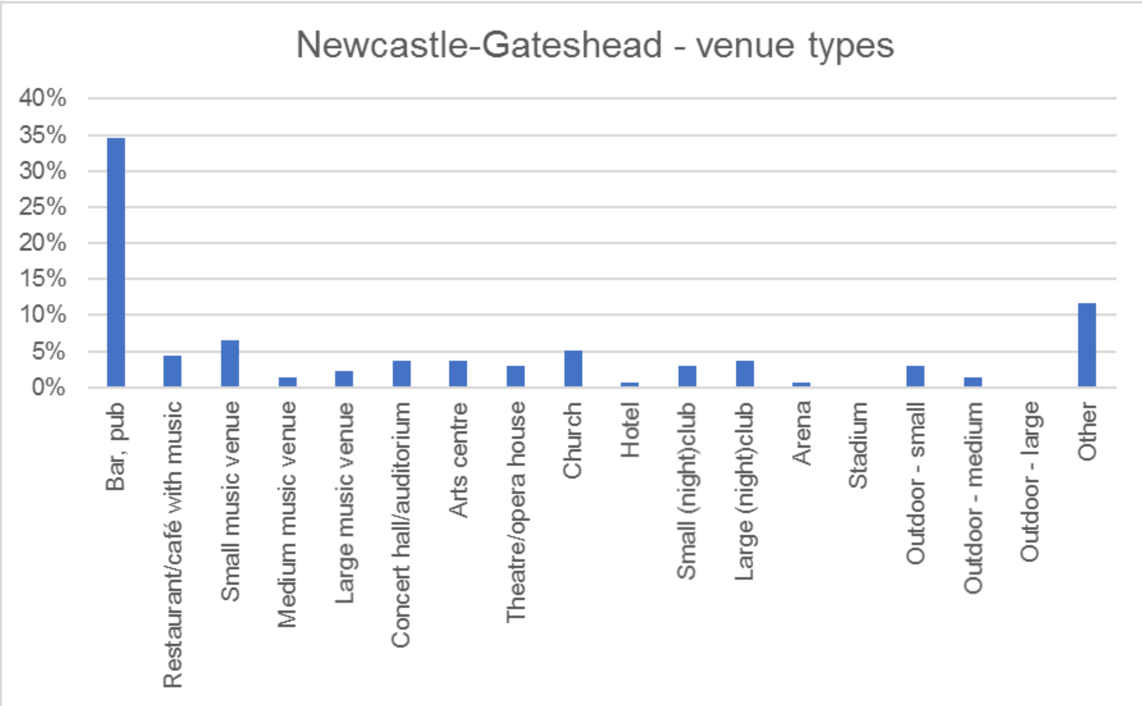

Figure 51: Types of spaces for live music in Newcastle-Gateshead

Local challenges for venues

As in Glasgow, however, respondents to the venue survey in Newcastle-Gateshead are facing some challenges. As can be seen from the chart below, 46% of the respondents to the online venue survey in Newcastle-Gateshead said the increasingly competitive environment between venues and promoters had an extreme, strong or moderate negative impact on their live music events in the past 12 months, 42% cited increased business rates, 38% cited the increased size/number of music festivals, and 37% said that noise-related complaints had negatively impacted.[123]

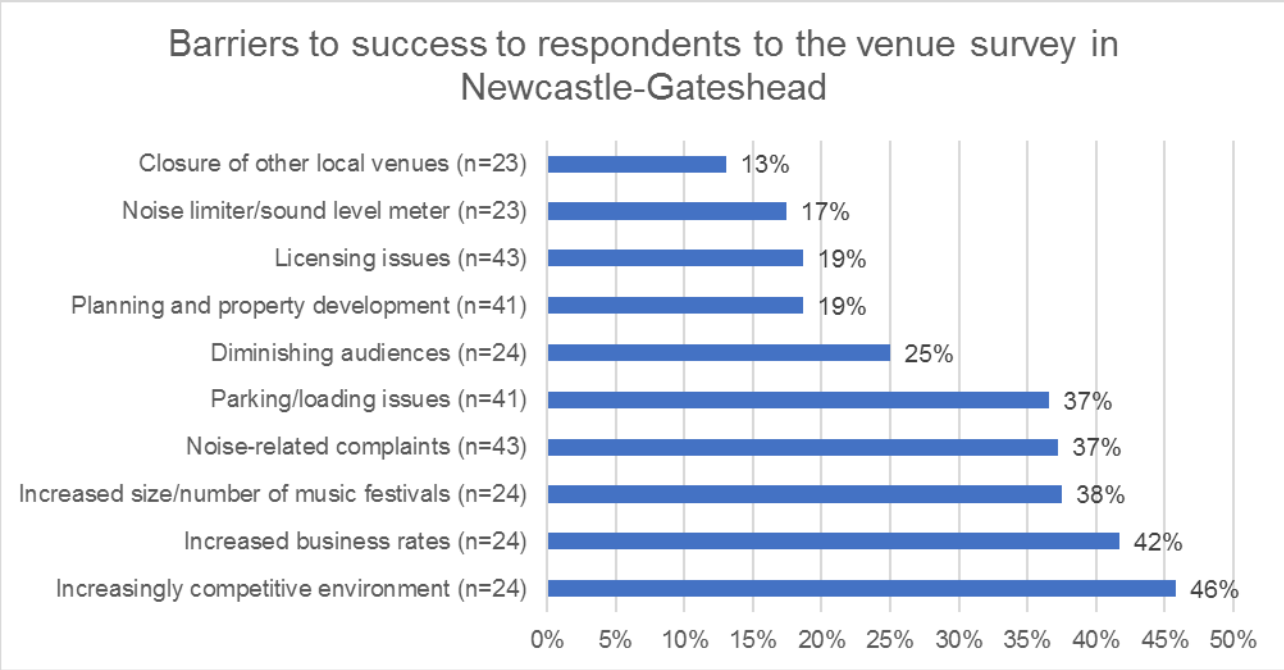

Figure 52: Barriers to success to respondents to the venue survey in Newcastle-Gateshead

The following is taken from a profile interview with one of Newcastle's longest serving nightclub proprietors in which he highlights some of the issues currently facing the city's live music sector and the social and cultural value that he believes that his venue has brought to the city (emphases in original).

Profile: Thomas Caulker, Proprietor, World Headquarters Club, Newcastle upon Tyne

The really *big* issue which we have in Newcastle is the issue of accommodation. The fact is that the council are broke and they have to get money out of *everything* and they are whacking up flats *everywhere* … If I'm running my business as I am now then nobody complains about the sound because there's hardly any sound audible outside the building. But if somebody wants to build a building *right* next door and the wall is the only divider, obviously there's going to be sound spillage, and the responsibility for that shouldn't come to me because *I pre-exist* … It shouldn't be a situation where somebody can develop a building from a business which operates through the day into residential accommodation and then the residential accommodation is able to complain about the noise you make at night and get you shut down … The onus should be put on the developers that they have to provide the necessary soundproofing to the people that they are selling the flats to. It shouldn't be that they're putting in a load of flats and within six months the venue's getting closed down because they're complaining about the noise. [Plus] business rates in Newcastle are going through the roof … Our council is just not funded at all. At least a third of our budget has gone in the last three years, so the city council has difficulty just emptying the bins and taking care of the old folk, and the business rates are very very high … The amount we pay in business rates does make it difficult to run our business. It's a lot of money. I pay thousands of pounds a month in business rates but our business rates do not reflect what we put back into the city, you know?

World Headquarters opened in 1993 but I've been involved in club promotion since 1984. I'm a mixed race person and I wanted to run a club that was more welcoming to people of colour than many of the clubs in Newcastle, somewhere that was more 'right on' and safe … Last year, Channel 4 did a film about us which focused on the multiculturalism of our venue. In November 2017, Newcastle University gave me an Honorary Doctorate in Civil Law [at a special ceremony commemorating the 50th anniversary of the award of the same degree to Dr Martin Luther King Jr] for the work that I've done and that the club has done in improving and diversifying the nightlife of Newcastle[lxxii] … Going to places like my club gives people something to believe in. For every young person there has to be a transition from being a baby to becoming an adult and that is socialising with other people … There is always going to be a need for young people to socialise together and to get to know each other, to understand how to interact with other people … Nightclubs and bars and live music venues are an essential part of that rite of passage of growing up. It's where you and your friends look forward to going, you go to a big event, you get dressed up, it's your musical culture, you're important because your little gang really *matters*, and you form partnerships and friendships, and this is the richness of life! And it takes place to the soundtrack of your favourite band, to the soundtrack of your favourite DJ, that's where it happens … There's always a musical accompaniment to youth.

Length of time venues have been operating

The chart below shows the length of time that respondents to the venue survey have been hosting/promoting music in Newcastle-Gateshead compared to all respondents to the venue survey. 55% of respondents to the venue survey in Newcastle-Gateshead have been operating as a space for live music for more than 10 years while 27% have been open for more than 30 years.[124]

[lxxii] To watch the acceptance speech in full go to https://www.facebook.com/newcastleuniversity/videos/1704787836240794/

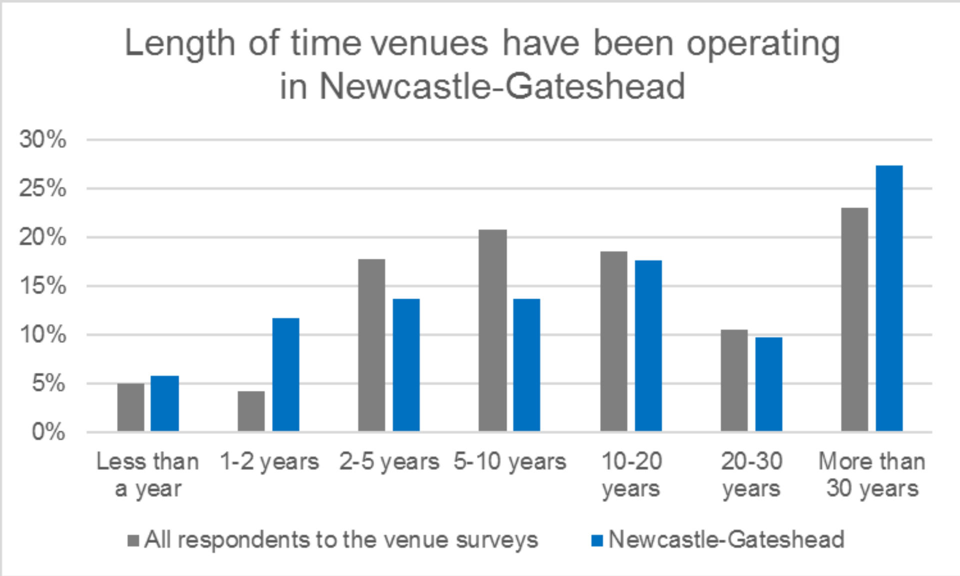

Figure 53: Length of time respondents to the venue survey have been operating in Newcastle-Gateshead

Types of live music events attended by genre by respondents to the audience online survey

As with Glasgow above, the census asked respondents to the audience survey in Newcastle-Gateshead to select genres that best describe the types of live music event they had attended over the past 12 months. The following chart shows this data in relation to UK data as a whole and appears to show that audiences in Newcastle-Gateshead attended slightly more metal, musical theatre and pop events in the past 12 months than respondents to the audience survey as a whole.[125]

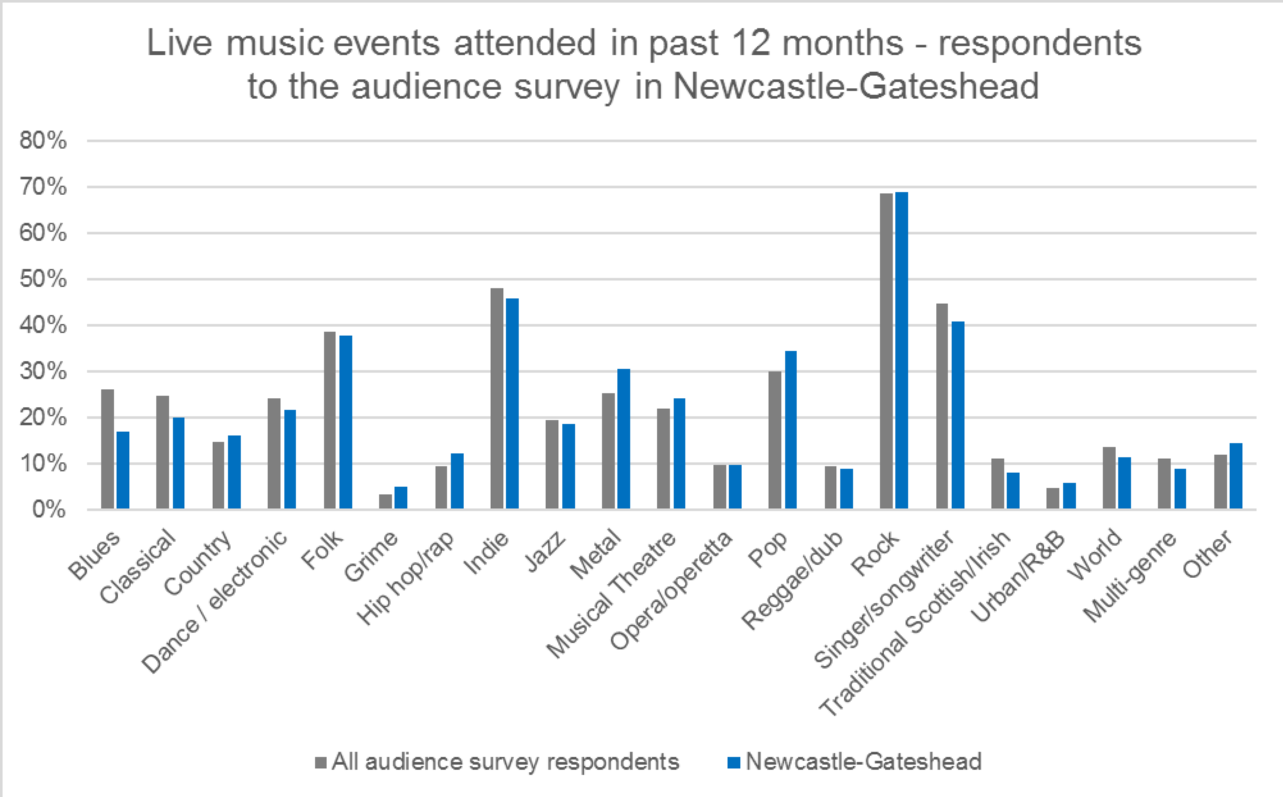

Figure 54: Live music events attended in past 12 months by respondents to the audience survey in Newcastle-Gateshead

Audience frequency of attendance

Respondents to the audience survey in Newcastle-Gateshead were asked how often on average they attend live music events each month. As the chart below suggests, 66% attend at least one ticketed and 32% at least one free concert and theatre venue or festival event per month. 58% attend at least one ticketed and 45% at least one free gig, club or small venue event per month.[126] The chart below appears to show that audiences in Newcastle-Gateshead attend more free live music concert/theatre venue/festival events than respondents to the audience survey as a whole, and slightly fewer ticketed gigs/clubs/small venue events.

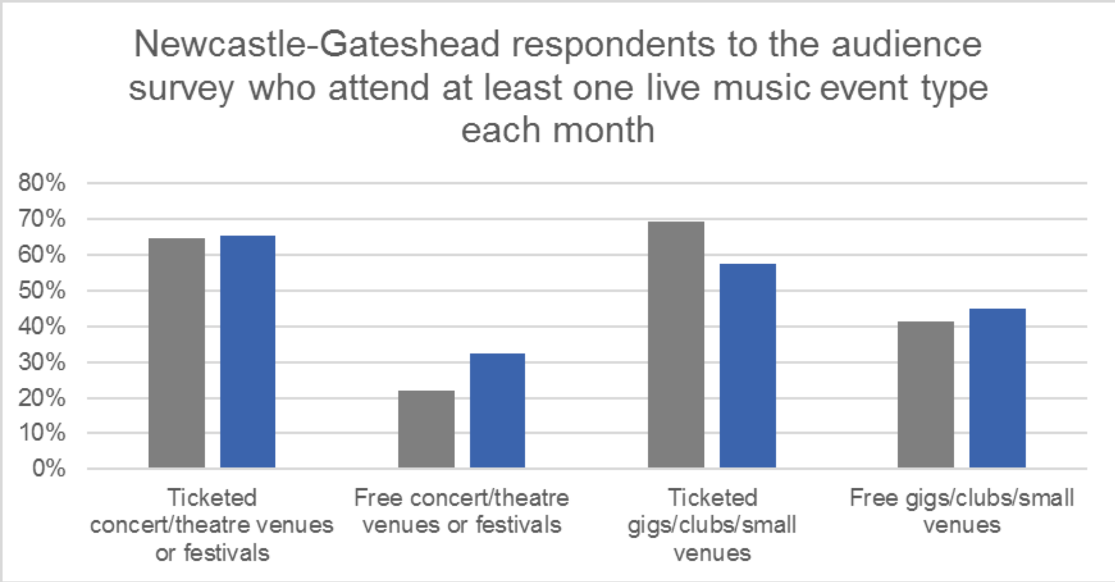

Figure 55: Attendance by respondents to the audience survey in Newcastle-Gateshead who attend at least one live music event each month

Snapshot census date

We estimate that some 9,200 people attended a live music event on 9-10 March 2017 in Newcastle-Gateshead.

As above, audiences in Newcastle-Gateshead were asked how they heard about the event on the snapshot census date. 47% found out about the event via word of mouth and 19% by social media, as can be seen in the chart below.[127] As with Glasgow above, ‘other’ included performing at the event, walking in off the street, and that the respondent was a regular.

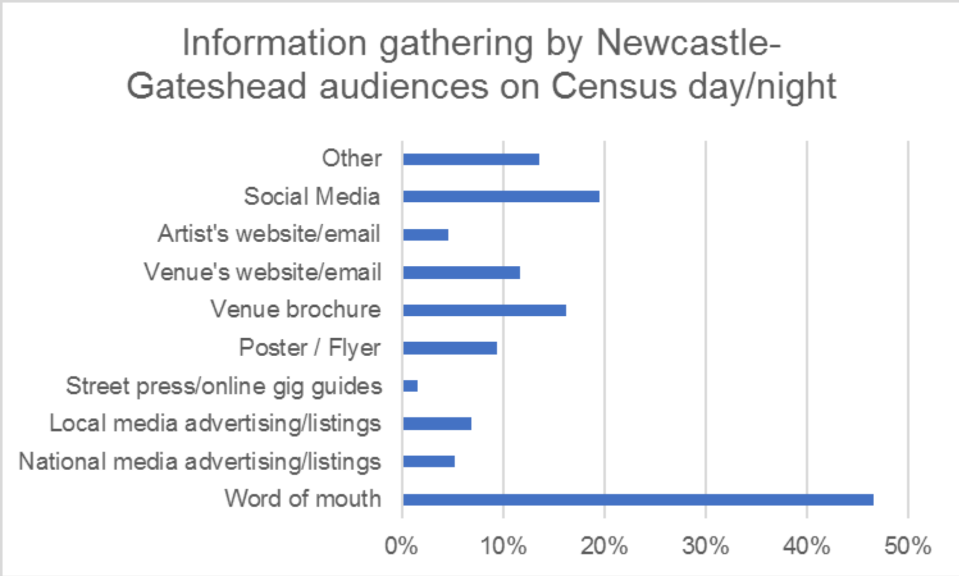

Figure 56: Information gathering by Newcastle-Gateshead audiences on census snapshot date

Volunteers also asked audiences how far they had travelled to the event on the snapshot census date. The median distance travelled by audiences in Newcastle-Gateshead on the snapshot census date was 6 miles and 27% of the audience travelled 20 miles or more (round trip, there and back again).[128]

As the chart below shows, for 35% of respondents to the audience survey in Newcastle-Gateshead, the main form of transport used on the snapshot census date was a car or van, 22% travelled by foot, and 18% travelled by bus, coach or minibus.[129]

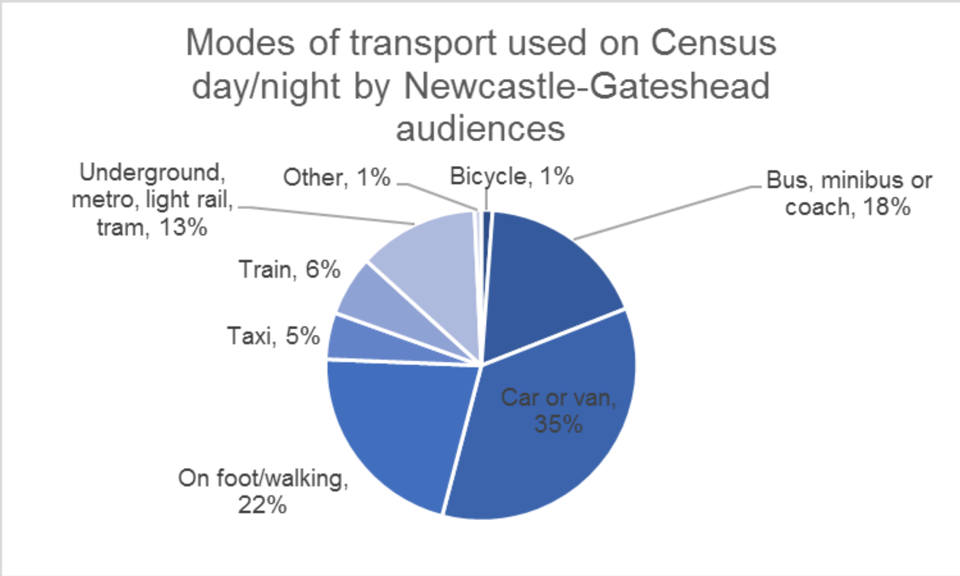

Figure 57: Modes of transport used by Newcastle-Gateshead audiences on census snapshot date

Oxford

Oxford, a city long associated with the college choirs of Christ Church and New College, came to national prominence in the 1990s with the likes of Ride and Radiohead, and today hosts genres ranging from roots reggae to jazz, and from folk to hip hop, the city's diverse population exuberantly represented in the annual Cowley Road Carnival. On the snapshot census date of 9-10 March 2017, volunteers found a great range of music, from Spin Jazz at the Wheatsheaf to hip hop at the Purple Turtle, from Andrew Lloyd-Webber's *Evita* at the New Theatre to the Catweazle Club at the East Oxford Community Centre, and from audiograft's experimental sound art at the Holywell Music Room to puppet opera at the North Wall. The four words used most often by respondents to the online audience survey to describe live music in Oxford are *varied*, *vibrant*, *quality* and *variety*.

Economic value

The estimated total annual spend on live music in Oxford is £10.5 million. This works out to an equivalent estimated GVA of £4.8 million and supports an estimated 350 FTE jobs based on all types of spaces where live music is played, including those for those whose primary purpose may not be music related.[lxxiii]

Types of spaces for live music

[lxxiii] A report by Oxford Inspires published in 2010 estimates that the cultural and creative sector in Oxfordshire supports 20,340 full time jobs and that another 10,000 part-time and self-employed people work in the cultural sector, including musicians (DPA & URS for Oxford Inspires 2010: 15).

As of March 2017, Oxford had at least 110 spaces where live music is played, for a 'usually resident' population of 151,900 (2011 census).

As can be seen in the chart below, 27 of these (25%) of the spaces for live music are music/arts venues (6% small/medium/large music venues, 6% concert halls, 5% arts centres, 6% theatres/opera houses, 2% small/large nightclubs and 0% arenas), 25% are bars or pubs, 15% are 'other' (including university buildings and social clubs), and 25% are churches or places of worship.

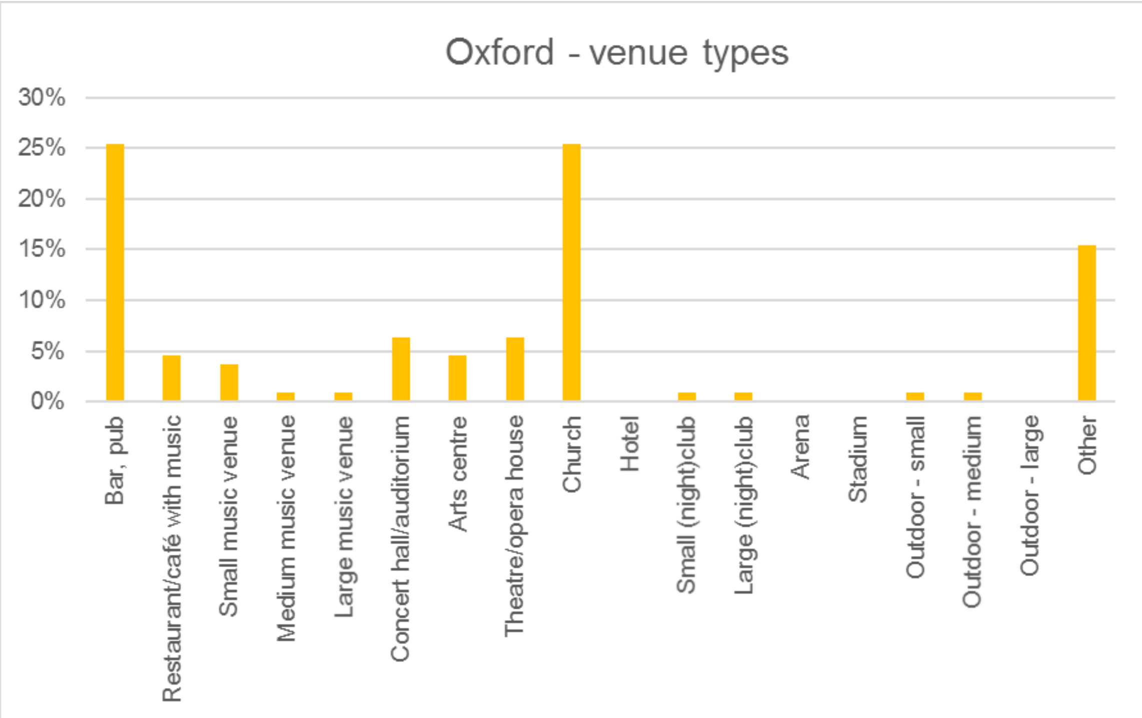

Figure 58: Types of spaces for live music in Oxford

Local challenges for venues

As with Glasgow and Newcastle-Gateshead, respondents to the venue survey in Oxford reported some challenges. As can be seen from the chart below, 43% of the respondents to the online venue survey in Oxford said the increasingly competitive environment between venues and promoters had an extreme, strong or moderate negative impact on their live music events in the past 12 months, 38% cited parking/loading issues, 30% cited the increased size/number of music festivals, and 18% said that increased business rates had negatively impacted.[130]

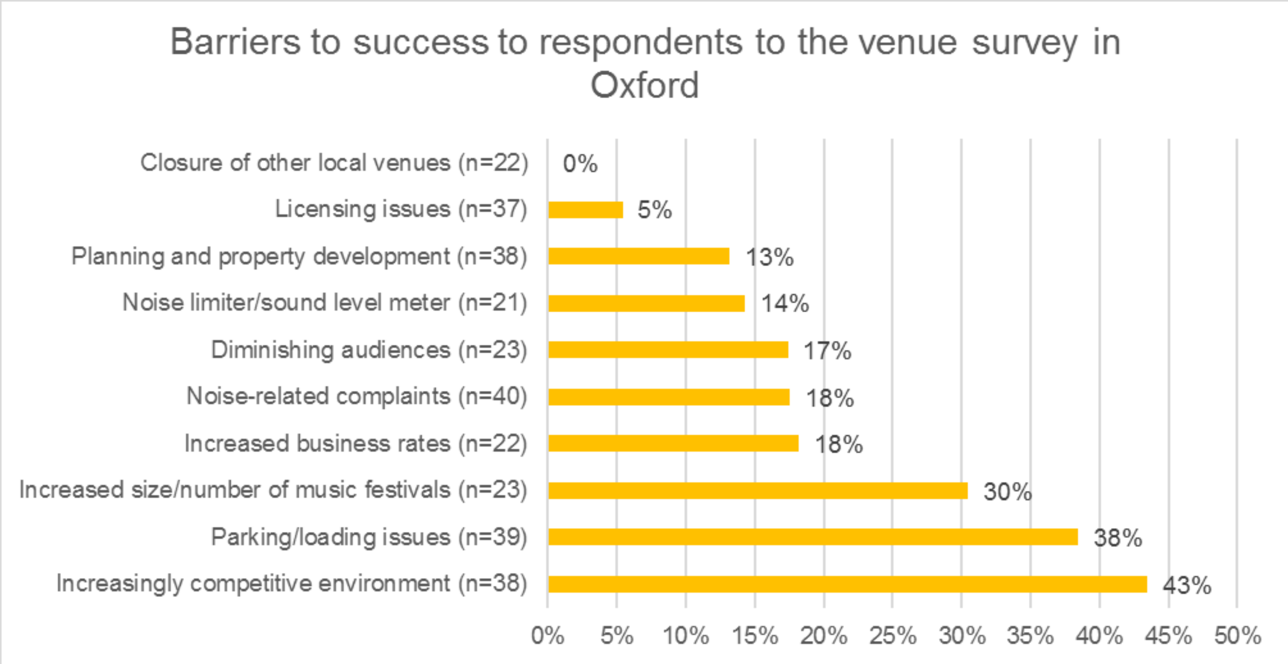

Figure 59: Barriers to success to respondents to the venue survey in Oxford

The following excerpt from a profile interview demonstrates some of the issues above, particularly competition between venues and promoters and issues around parking.

Profile: Victoria Larkin, Deputy Director, Oxford Contemporary Music (OCM)
Oxford has a remarkably sustained, very vibrant music scene … It’s cheaper to live in nearby Reading or Bicester but culture is a huge part of why people want to live here instead … The best thing about it is its breadth. Not just that there’s lots of it, but there is an enormous wealth of amazing quality, what with college choirs, classical promoters bringing in big names, a thriving rock/pop, jazz

and underground scene, a big folk weekend, good quality open mic nights, and groups like the Oxford Improvisers pushing the experimental envelope … [In terms of venues, however] there's not really a big gig space other than the O_2 Academy ... There are a lot of 100-200 capacity venues which can sometimes make it tricky to turn a profit. The larger venues, 400-500 capacity, are often church or theatre venues so they're not always necessarily the right kind of venue for what we need … Parking is eye-wateringly expensive and venues often don't have their own parking facilities … At times, the great range of cultural activity can cause diary clashes meaning that the audience gets divided between two or more events, which can make it risky for promoters.

Length of time venues have been operating

The chart below shows the length of time that respondents to the venue survey have been hosting/promoting music in Oxford compared to all respondents to the venue survey. 49% of respondents to the venue survey in Oxford have been operating as a space for live music for more than 10 years while 34% have been open for more than 30 years.[131]

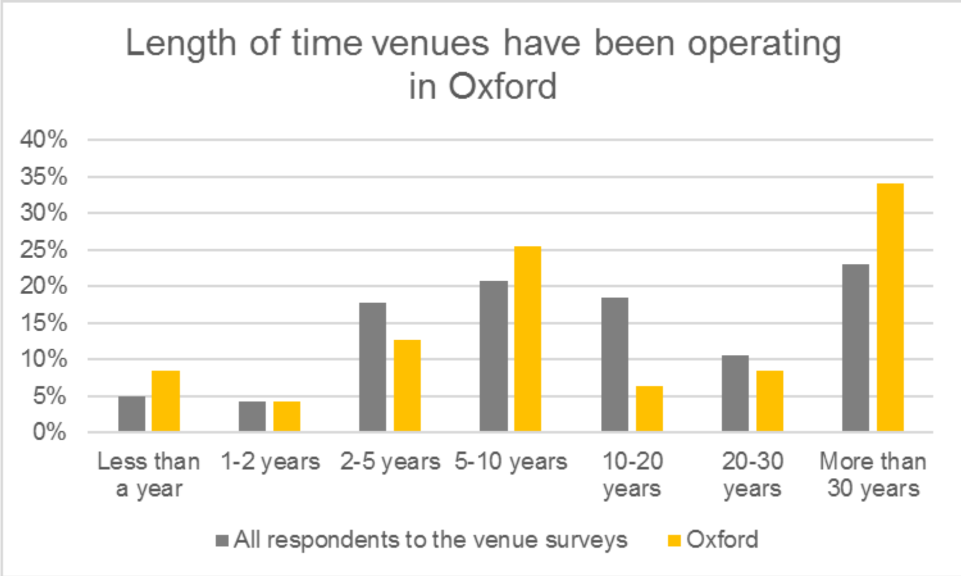

Figure 60: Length of time respondents to the venue survey have been operating in Oxford

Types of live music events attended by genre by respondents to the audience online survey

As in the previous sections, audiences in Oxford were asked to select genres that best describe the types of live music event they had attended over the past 12 months. The following chart shows this data in relation to UK data as a whole and appears to show that they attended more classical events in the past 12 months than respondents to the audience survey as a whole, and slightly more jazz and opera/operetta events.[132]

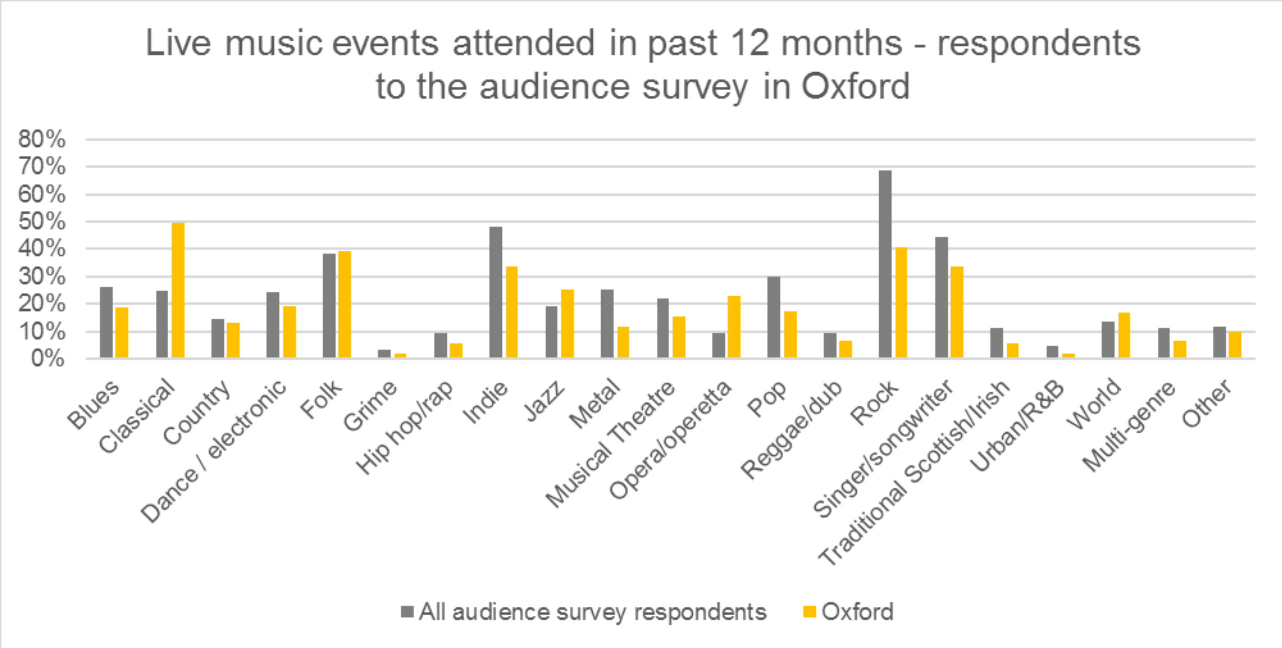

Figure 61: Live music events attended in past 12 months by respondents to the audience survey in Oxford

Audience frequency of attendance

63% of respondents to the audience survey who are based in Oxford attend at least one ticketed and 22% at least one free concert and theatre venue or festival event per month. 59% attend at least one ticketed and 35% at least one free gig, club or small venue event each month.[133] The chart below appears to show that audiences in Oxford attend fewer free *or* ticketed gig, club or small venue events per month than respondents to the audience survey as a whole.

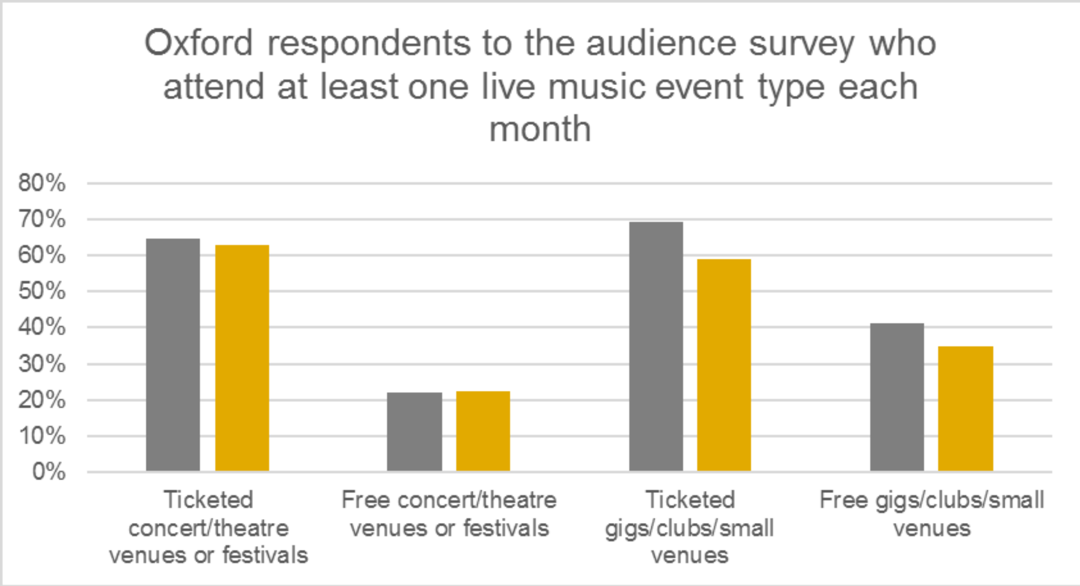

Figure 62: Attendance by respondents to the audience survey in Oxford who attend at least one live music event each month

Snapshot census date

We estimate that some 4,500 people attended a live music event on 9-10 March 2017 in Oxford.

Respondents to the audience survey in Oxford who attended a live music event on the snapshot census date were asked how they heard about the event. 40% found out about the event via word of mouth and 23% by social media, as can be seen in the chart below.[134] As with Glasgow and Newcastle-Gateshead above, ‘other’ included performing at the event, walking in off the street, and that the respondent was a regular.

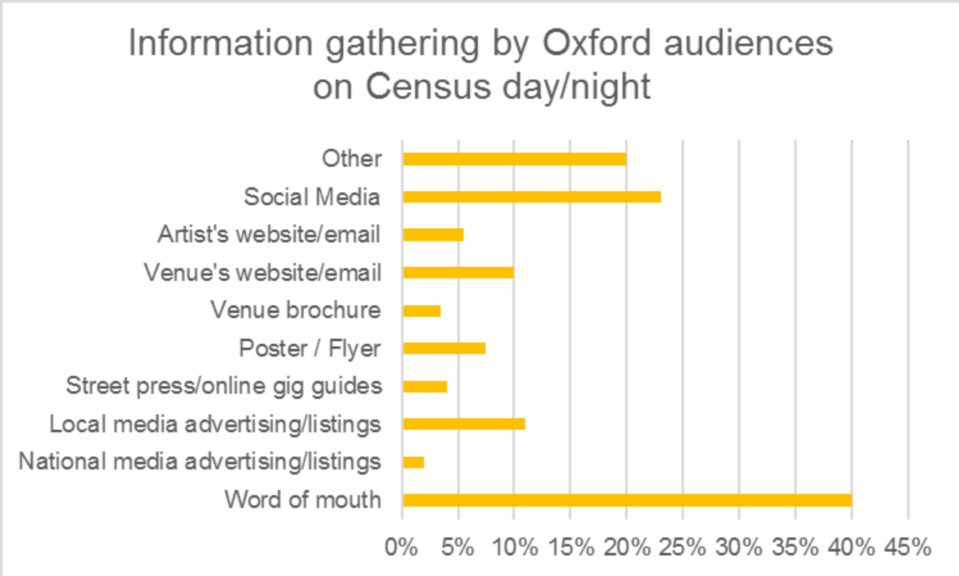

Figure 63: Information gathering by Oxford audiences on census snapshot date

The following excerpt from a profile interview highlights how local 'street press' and listings can have a galvanising impact on the local scene and also highlights the continuing threat to smaller venues within the city:

Profile: Ronan Munro, Nightshift magazine, Oxford

The first *Nightshift* magazine was published in July 1995 – before that it was called *Curfew* which started in 1991 – and has been running every month since then … Pre-internet it was very very hard for any Oxford band to move up and get noticed by the music industry … I started this, then, with the aim of getting people to go out to hear all of the great music that is being made in Oxford. In fact, the entire point of my life has been trying to get people to go to gigs … Since we began, there have been venue closures and the *threat* of venue closures but also the massive global success of Oxford bands like Radiohead, Supergrass, Foals, Stornoway, and Glass Animals (emphasis in original). This has raised the bar and raised the ambitions and expectations of everybody.

Live music is incredibly fragile and the main threat to the scene is the closure of venues. There are lots of little pubs putting on music but only four venues for non-classical music in Oxford. One of the small music venues was recently threatened with closure as the building's owner, a charity, wanted to turn it into retail space, and a planning application has recently been put in for flats next door to the only other small music venue in the city centre, which could lead to noise complaints in the future. We need to protect venues against such threats.

Audiences in Oxford were asked how far they had travelled to the event on the snapshot census date. The median distance travelled by audiences in Oxford on the snapshot census date was 4 miles and 27% of the audience travelled 20 miles or more (round trip, there and back again).[135]

As above, they were also asked to specify the main form of transport they used to travel to the event on the snapshot census date. 28% travelled on foot to the event on the snapshot census date, 25% in a car or van, and 25% by bus, minibus or coach, as can be seen in the chart below:[136]

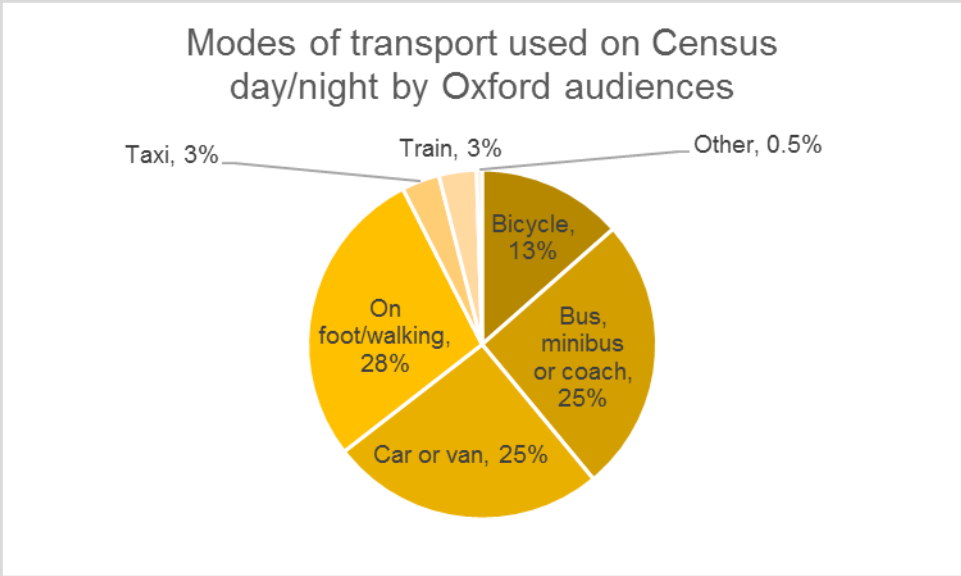

Figure 64: Modes of transport used by Oxford audiences on census snapshot date

This chapter has given a brief overview of the state of live music in the three snapshot cities to illustrate some of the topics covered in previous chapters. The report will now move into its concluding chapter to give recommendations for policymakers, those working within the sector, and future researchers.

Conclusions and recommendations

This report has explored the economic, social and cultural value of live music and examined some of the barriers to success within the sector at present. In doing so, it has helped to bridge the gap between how we understand the value of live music on the one hand and, on the other, the current challenges facing the sector in the UK.

As we found in the Edinburgh Live Music Census, any locality has a characteristic live music ‘ecology’ – a mix of venues of different capacities, demographic variations and the distinctive features of its local government and infrastructure (Behr *et al* 2015: 1). As shown in the previous chapter, these differences can then impact on things like the types of event attended, travel and transport, as well as the barriers facing venues in each city.

It is clear that while each snapshot city is different, and that each is different again from the UK as a whole, there are some issues which appear to be universal.[lxxiv] For example, respondents to the venue survey in Glasgow and Newcastle-Gateshead appear to be struggling with increased business rates while in Oxford one of the main issues is over parking/loading issues. As was seen earlier in the report, some of the issues are particularly acute at the smaller end of the spectrum and in an urban environment. Such problems are exacerbated by external factors such as property development, the uncertainty surrounding Brexit,

[lxxiv] It is important to note that it is not just the UK in which the small venue sector appears to be suffering. From the United States to Australia and Ireland to Iceland, it appears to be a similar story, albeit not always for the same reasons (Larsson 2017a; Barrie 2016; O’Byrne 2017; Shapiro 2017a).

and a highly competitive leisure market. When asked whether they believe that they will be promoting as many events in three years' time, for instance, two promoters answered thus:

> *[I will be promoting fewer gigs in 3 years' time because there is now] too much risk and stress. Falling ticket prices. Younger generation not buying into world music so much. Economy will turn down after Brexit. Cost of foreign artists will increase with falling pound.*
> Local 'world music' promoter, London, promoting for 10-20 years.

> *[My most significant problem is] persuading new people to try live music. We have a core of loyal followers. But to get new faces in, prize them away from the comfy sofa and TV. That is hard.*
> Local jazz promoter, West Midlands, promoting for 1-2 years.

In conclusion, the UK Live Music Census 2017 builds on previous work on the economic value of the music industries, including live music, conducted by UK Music (for example, UK Music 2017a; 2017b) and PRS for Music (for example, Page and Carey 2009), and on the current state of play for smaller live music venues by the Music Venue Trust. The census breaks new ground by focusing on the social and cultural value of live music specifically – which have at times taken something of a back seat to economic analyses – to synthesise these interdependent aspects of the UK's live music sector in the first nationwide live music census. As Lord Clement-Jones, the peer who championed the 2012 Live Music Act, said before the project started:

> *The UK Live Music Census is a very welcome initiative for policymakers as it will provide rich data about local live music activity from those who make it and those who enjoy it.*
>
> *Live music is facing a number of challenges at the moment, from venues closing down to the threat of increased business rates. However, data about the sector has so far been relatively scarce and mostly anecdotal, and so the much needed data collected by the UK Live Music Census will help us protect live music going into the future*
> Cited in IQ 2017c.

As a result of the census, then, we now have a methodology which can be developed going forward, a rich dataset of quantitative and qualitative data about four key sets of stakeholders, and some interesting and useful findings about the sector. The data has enabled us to make suggestions for evidence-based policy which will help to protect the sector going into the future, as well as a number of avenues for further research.

We hope that this project will prove a useful starting point for future census exercises and will enable historians from the future to be able to look back at the state of live music in the UK in 2017. Just as population censuses have proved to have immense value beyond their initial remit, so too we hope that a regular UK live music census will help to better chart the ever-shifting trends within the sector. In doing so, it will allow researchers and policymakers alike to better understand how and why live music continues to be valued, and the challenges faced by those who create and enjoy it, as we move into 2018 and beyond.

To this end, we conclude with the following recommendations:

Recommendation 26. We *recommend* a regular UK-wide live music census to enable longitudinal research into the sector based on the free, open source toolkit published as part of the UK Live Music Census project, which contains a 'how-to guide', a glossary and survey questions.

Recommendation 27. We *recommend* regular local live music censuses as above.

As seen throughout the report, there are some actions that could be taken now to help live music flourish. Based on the findings of our research, we make the following recommendations to policymakers, the music industries, venue operators and promoters and future researchers, in order to continue to support and develop a sustainable live music ecology:

POLICY RECOMMENDATIONS AT UK GOVERNMENT LEVEL

We welcome the announcement in January 2018 of a new Digital, Culture, Media and Sport Committee inquiry into live music which will examine music tourism, the impact of Brexit, small music venues, ticket abuse, sustainability and the impact of live events (Digital, Culture, Media and Sport Committee 2018). We also welcome the announcement by the government of the inclusion of the 'Agent of Change' principle within the National Planning Policy Framework for England (Ministry of Housing, Communities & Local Government 2018). We recommend that the UK government should:

- Continue to develop a legally binding 'Agent of Change' principle, including a prompt and robust implementation into the new National Planning Policy Framework for England;
- Review business rates for music venues and other smaller spaces for live music;
- Continue to investigate secondary ticketing via the Competition and Markets Authority.

POLICY RECOMMENDATIONS AT DEVOLVED ADMINISTRATIVE LEVEL

- Work towards the inclusion of 'Agent of Change' into national planning frameworks in Scotland and Northern Ireland, taking a similar approach to England and Wales;
- Encourage more extensive funding for emerging artists, venue infrastructure, tour support and rehearsal spaces;
- Promote music education in schools and encourage live music attendance inside and outside the curriculum.

POLICY RECOMMENDATIONS AT LOCAL AUTHORITY LEVEL

- Ensure that any local authority cultural policy recognises the economic and cultural value of live music and live music venues to the local region, and that planning and economic policies take account of the actual and potential contribution of live music. (One way of doing this would be to set up a Music Office and/or Night Mayor/Czar);
- Recognise small and medium music venues as key sites of artist and audience development and as cultural and community assets;
- Work closely with *all* stakeholders on any proposed property developments that affect existing spaces used for live music, particularly those within the night-time economy;
- Ensure that licensing restrictions do not overly inhibit venues' ability to host gigs for under-18s;
- Encourage links between education communities and local live music venues and promoters;
- Introduce free or subsidised parking permits for load-ins and load-outs at agreed venues.

RECOMMENDATIONS FOR THE MUSIC INDUSTRIES

- Discuss the financial sustainability of the smaller venue sector, including innovative funding models, via consultation with bodies such as UK Music's UK Live Music Group;
- Bodies such as the Music Venue Trust should continue to encourage the wider music industries (including recording and publishing, possibly via the UK Music network) to support musicians and smaller venues beyond current

support; for example, by subsidising emerging artist fees and/or providing venue infrastructure;

- Continue to support the work of bodies such as UK Music and its members in linking industry and education.

RECOMMENDATIONS FOR SMALL-SCALE SPACES AND PROMOTERS

The following recommendations are intended to illustrate some ideas for best practice for small-scale spaces for live music and for promoters:

- Examine and, where appropriate, re-evaluate governance structures and policies as a possible means of being able to access funding;
- Adopt measures and develop policies where appropriate so that live music can be enjoyed in a safe space, such as child protection, sexual harassment, environmental health, etc.;
- Develop relationships with potential funding bodies and local authorities if none yet exist;
- Develop policies to incorporate no-cost and low-cost initiatives for environmental sustainability for artists and audiences and accessibility for Deaf and disabled artists and audiences.

Sources of information on best practice and guidance

Accessibility: Attitude is Everything (2017) *DIY Access Guide*.

Careers advice UK Music (2017f) *Careers information pack*.

Entrepreneurship: European Music Council (2018) *Shared Training Activities for Music Professionals (STAMP) webinars (YouTube).*

Fair treatment of musicians: Musicians' Union (2015) *Fair Play Guide.*

Resources, advice and networking for 'grassroots' music venues:

Music Venue Alliance / Music Venue Trust

Safe spaces: Webster and Behr (2017) *Ten things learned at Venues Day 2017.*

Sustainability: Julie's Bicycle (2015) *Audience Travel Guide.*

Julie's Bicycle and Generator (2016) *Mapped Out: Environmental sustainability for grassroots live music promoters*.

RECOMMENDATIONS FOR FURTHER RESEARCH

Research into the live music sector is still relatively in its infancy and there is much still to be done. Based on the findings from the first ever UK Live Music Census we make the following recommendations to future researchers:

- A regular UK-wide live music census to enable longitudinal research into the sector based on the free, open source toolkit published as part of the UK Live Music Census project, which contains a 'how-to guide', a glossary, survey questions and appendices containing templates and a guide to the economic methodology (uklivemusiccensus.org/#toolkit);

- Regular local live music censuses as above;
- Research into the reasons behind venue closure and a historical understanding of what constitutes a ‘normal’ rate of attrition in the live music sector;
- Research into issues around diversity for venue staff and promoters;
- Further research into the impact of festivals on key stakeholders within the live music event;
- Further research into the relationship between alcohol and live music, with an emphasis on young audiences/under-18s;
- Further research into the leisure activities of young people and the place of live music therein;
- Further research into local venue provision in order to understand best practice in terms of capacity and venue types.

(See the Live Music Exchange website, livemusicexchange.org, for a useful set of resources of extant research into live music from around the world.)

Collated list of recommendations

Recommendations to policymakers, the music industries, venue operators and promoters, and future researchers have been included throughout this report. The following is a list of the recommendations in the order in which they appear and their location. The recommendations are also re-ordered and listed under relevant headings in the 'Conclusions and recommendations' chapter.

Acknowledgements

We thank our project partners, the Musicians' Union, Music Venue Trust and UK Music, for their help and guidance throughout this project. We also thank our advisory board and those who took part in the focus groups (listed in Appendix 3) for their help and advice in agreeing the survey questions and consultation during the design of the methodology. Thanks also to Jonathan Todd at BOP Consulting for his very helpful feedback on the economic methodology.

Thanks to the members of UK Music's Music Academic Partnership (MAP) who ran affiliate live music censuses for their invaluable contribution to the project in terms of their input into the focus groups, help and advice on the survey design and the hard work and effort that they put into their own live music censuses, through which they contributed important data to the project. These were: Phil Nelson at British & Irish Modern Music Institute (BIMM) Brighton, Sam Nicholls at Leeds Beckett University, Mat Flynn at LIPA/University of Liverpool, and Chris Anderton at Southampton Solent University. Thanks also to staff and students at Bucks New University and Oxford Brookes University for their help with the Oxford census. Thanks to members of UK Music's UK Live Music Group for their generosity in providing the project with free tickets as an incentive for completing the surveys, and for consultation on aspects of the project. (UK Music's UK Live Music Group is chaired by Live Nation's Paul Latham and membership consists of the Agents' Association, Association for Electronic Music, Association of Festival Organisers, Association of Independent Festivals, Concert Promoters Association, International Live Music Conference, National Arenas Association, Production Services Association, and Music Venue Trust.) Thanks also to the Musicians' Union's Live Performance Committee for feedback on the musician survey and to Luke Hinton at The Horn in particular for feedback on the promoter survey.

In addition to some of the focus group participants, our advisory board included Norma Austin Hart (Councillor, Edinburgh City Council), Guy Dunstan (Chairman, National Arenas Association), Richard Lewis (Councillor, Edinburgh City Council), Jim Mawdsley (Director, Generator), Dobe Newton (City of Melbourne's Strategic Music Advisory Group), Paul Reed (General Manager, Association of Independent Festivals), Shain Shapiro (Founder and CEO, Sound Diplomacy and Music Cities Convention), John Wardle (Policy Director for the Live Music Office, Australia).

Thank you also to the profile interviewees (see Appendix 4) who gave their time to speak to us about what they do.

Last but not least, thank you to all the many audiences, musicians, promoters and venues who either took the time to fill out a survey or were interviewed for this report, and to all the student and staff volunteers for their invaluable help with local censuses in March and June 2017. Special thanks to Chris Adams, Stan Erraught, Paul Fields, Erli Kasikov, Gabrielle Kielich, Tracey MacDonald, Ruairidh Padfield, Jennifer Skellington, James Taylor, Luis Vázquez de Lara Padilla, Jason Warner and Laura Wood.

About the authors

The Principal Investigator on the UK Live Music Census team was Dr Matt Brennan, AHRC Leadership Fellow at the University of Edinburgh, whose current research focuses on music and sustainability, the music industries, and popular music history. Dr Adam Behr, Lecturer in Contemporary and Pop Music at Newcastle University, was a Co-Investigator on the project. His research covers the politics and sociology of music – particularly popular music – and the music industries. Professor Martin Cloonan, Director of the Turku Institute for Advanced Studies at the University of Turku, Finland, was also a Co-Investigator. His research interests include the politics of popular music and issues concerning regulation, censorship and freedom of expression. The postdoctoral Research Associate on the project at the University of Edinburgh was Dr Emma Webster, whose interests are in live music and festivals and about which she has also written reports for the live music and festivals industries.

Professor Jake Ansell, Professor of Risk Management at the University of Edinburgh, was the consultant statistician on the project and the postgraduate statistician was Bozena Wielgoszewska, who is studying for a PhD at the University of Edinburgh.

About Live Music Exchange

Brennan, Behr, Cloonan and Webster are co-directors of Live Music Exchange (LMX, livemusicexchange.org), a research hub for anyone interested in live music research. Following on from a successful three-year AHRC-funded project examining the history of live music in Britain since

1950, LMX began in 2012. Today LMX runs an active website and blog and organises knowledge exchange events which bring together academics and industry practitioners.

Website: livemusicexchange.org

Contact: mailto:uklivemusiccensus@gmail.com

Appendix 1: Characteristics of the sample

Audience survey

A total of 6,044 audience online surveys were started with 2,656 completed responses submitted. A total of 1,443 people completed an audience interview survey on the snapshot census date on 9-10 March in Brighton, Glasgow, Leeds, Newcastle-Gateshead, Oxford and Southampton, while 206 people completed an audience interview survey as part of the Liverpool Live Music Census on 1-2 June 2017. The table below shows the characteristics of the sample for the data collected on the snapshot census date ('audience interview'), for the online survey and for the two combined. Note that in all surveys, not all respondents answered all of the posed questions.

Location	Snapshot census date audience interview		Online survey		Combined	
Data source	**%**	**No. of responses**	**%**	**No. of responses**	**%**	**No. of responses**
Male / Female / Prefer not to say	53 / 46 / 1	1,544	56 / 43 / 1	2,665	55 / 44 / 1	4,209
Median interval of age	35-39	1,593	45-49	2,661	40-44	4,254
18-34 year-olds / 35-64 year-olds / Over-65 year-olds / Prefer not to say	49 / 39 / 11 / 0.3	1,593	25 / 66 / 9 / 0.3	2,661	34 / 56 / 10 / 0.3	4,254
Access requirements for live music events? (Yes / No / Prefer not to say)	3 / 97 / 0	749	6 / 92 / 1	2,683	6 / 93 / 1	3,432
'White' / Not 'white' / Prefer not to say (ethnicity)	94 / 4 / 2	1,572	96 / 2 / 2	2,643	95 / 3 / 2	4,215

Table 2: Characteristics of the sample for respondents to the audience survey

As noted earlier, it is worth pointing out here that the census was well publicised across the BBC network and other national and local broadcasters.[lxxv]

However, the sample was self-selecting and the researchers note the relatively low proportion of BAME (Black, Asian,

[lxxv] For a list of media coverage about the Census, see http://uklivemusiccensus.org/press/

Minority Ethnic) respondents participating in the UK Live Music Census. We recognise the need to address this in future live music censuses. We are also aware that, of necessity, the first UK Live Music Census, as elsewhere, has focused on cities and there is scope to address smaller (urban and rural) populations in future live music censuses.

The table below shows the characteristics of the sample in each snapshot city:

Location	**Glasgow**		**Newcastle-Gateshead**		**Oxford**	
Data source	**Combined audience interview and online %**	**Snapshot census date audience interview %**	**Combined audience interview and online %**	**Snapshot census date audience interview %**	**Combined audience interview and online %**	**Snapshot census date audience interview %**
18-34 years old / 35-64 years old / over-65	48 / 46 / 6 (n=576)	59 / 34 / 7 (n=323)	44 / 40 / 16 (n=527)	47 / 34 / 19 (n=413).	41 / 37 / 21 (n=343)	63 / 21 / 15 (n=180)
Male / female	57 / 43 (n=559)	58 / 41 (n=305)	51 / 48 (n=509)	51 / 48 (n=395)	56 / 44 (n=338)	56 / 44 (n=176)

Table 3: Characteristics of the sample for respondents to the audience survey in each snapshot city

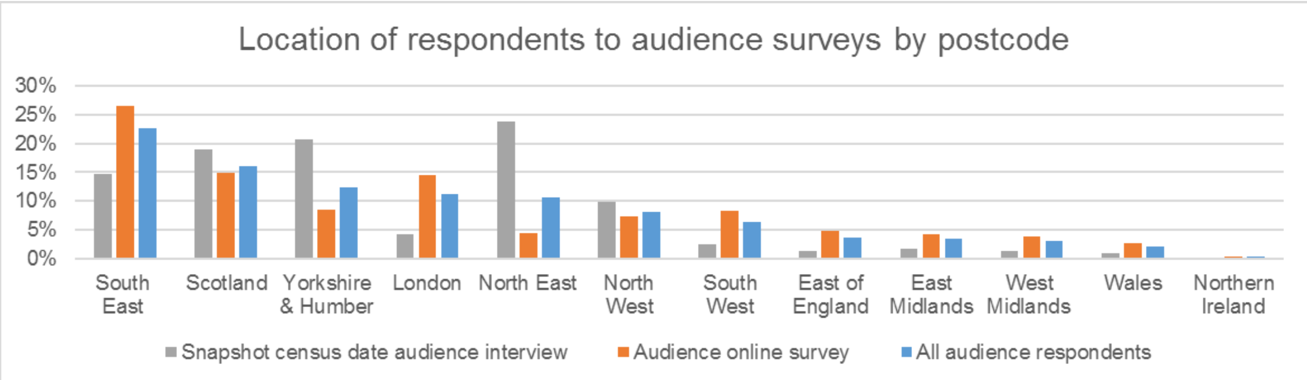

Figure 65: Location of respondents to audience surveys by region

Respondents were asked to complete the shorter audience interview survey if they were at a live music event on the snapshot census date, hence some respondents outside the snapshot cities answered the audience interview survey since both the shorter audience interview survey and the longer audience online survey were available online on 9-10 March 2017.

Musician survey

A total of 2,969 online musician surveys were started with 1,598 UK-based respondents submitting a completed response. The median interval of age of all respondents to the musician survey is 50-54 years-old.[137] The median interval of age of respondents to the musician survey identifying as professional musicians is 45-49, for semi-professionals is 50-54, and for amateurs is 55-59.[138] The ethnicity of respondents is predominantly white (95%) with 3% preferring not to specify their ethnicity[139] (see above with regard to future censuses). 13% of respondents' day-to-day activities are limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months, out of which 2% are severely constrained.[140] Based on postcodes, the majority of respondents to the musician survey are from the South East (27%) and London (17%).[141] Note that we had hoped to be able to discuss the findings of the musician survey at a more local level but we had optimistically hoped for a larger return than what we received for each snapshot city.

Defining a musician is not a straightforward task but, as the surveys were self-selecting, then the assumption was made that the respondent self-defined as a musician. The survey asked musicians to define themselves as professional, semi-professional or amateur, and to define themselves in terms of their career level; the breakdown of each type is in the charts below.[142] It is worth noting that some respondents who defined as professional also defined themselves as 'retired' highlighting how one's perception of one's musician type does not necessarily change even when one stops working.

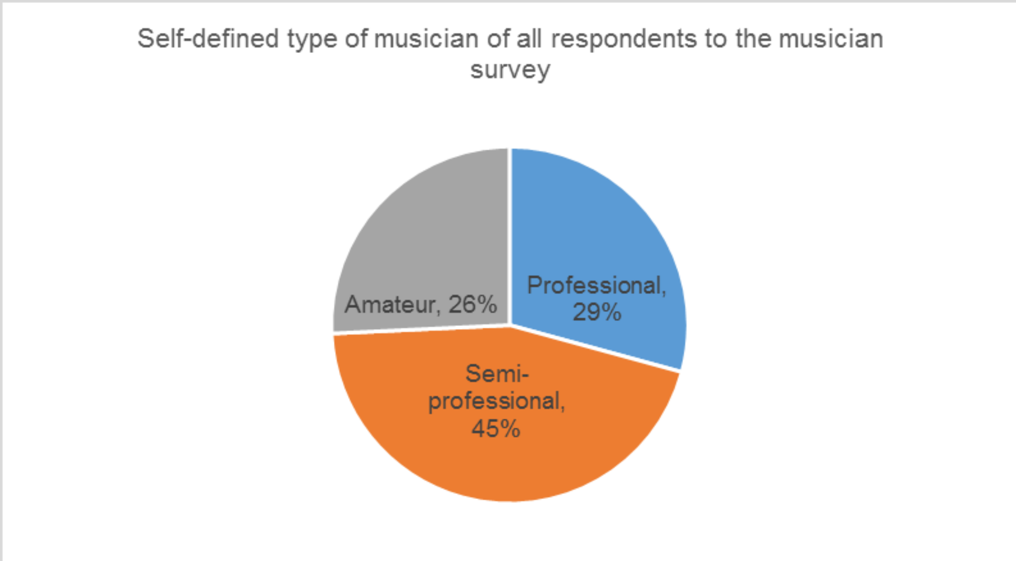

Figure 66: Self-defined type of musician for all respondents to the musician survey

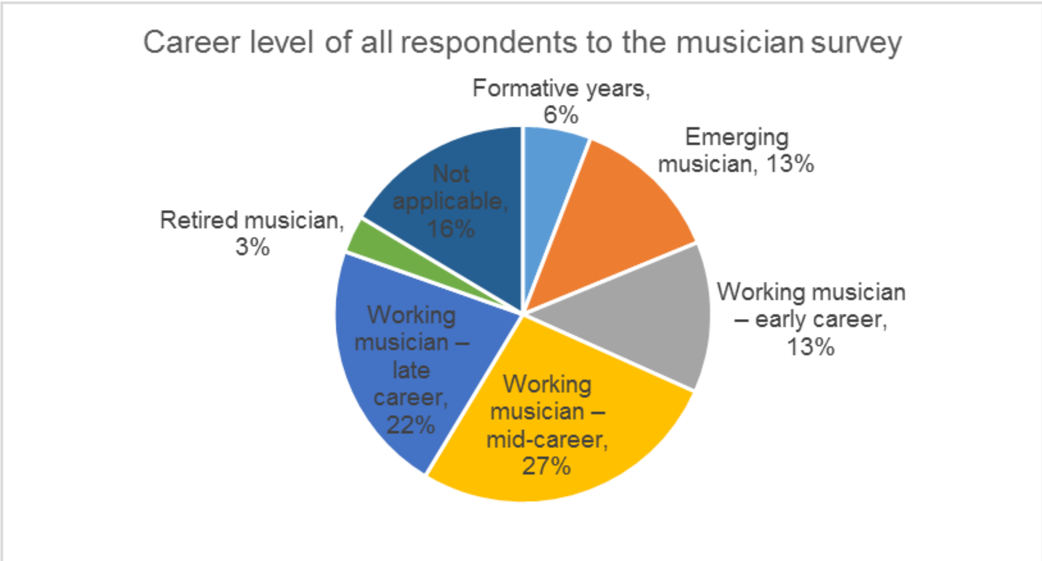

Figure 67: Career level of all respondents to the musician survey

Promoter survey

A total of 367 surveys were started with 141 fully completed surveys submitted. The majority of respondents are based in the South East, Scotland, and Yorkshire and Humber. Promoters' annual turnover ranged from £0 to £7.2 million, i.e. it is a diverse group of respondents. Future live music censuses will ask respondents to self-identify as amateur, semi-professional or professional promoters. As the chart below shows, the majority of respondents (65%) to the promoter survey defined themselves as ‘local’ (promoting only within their home town/city), 23% as ‘regional’ (promoting within a particular county and/or region), 8% as ‘national’ (promoting across the UK) and 4% as ‘international’ (promoting within and beyond the UK).[143]

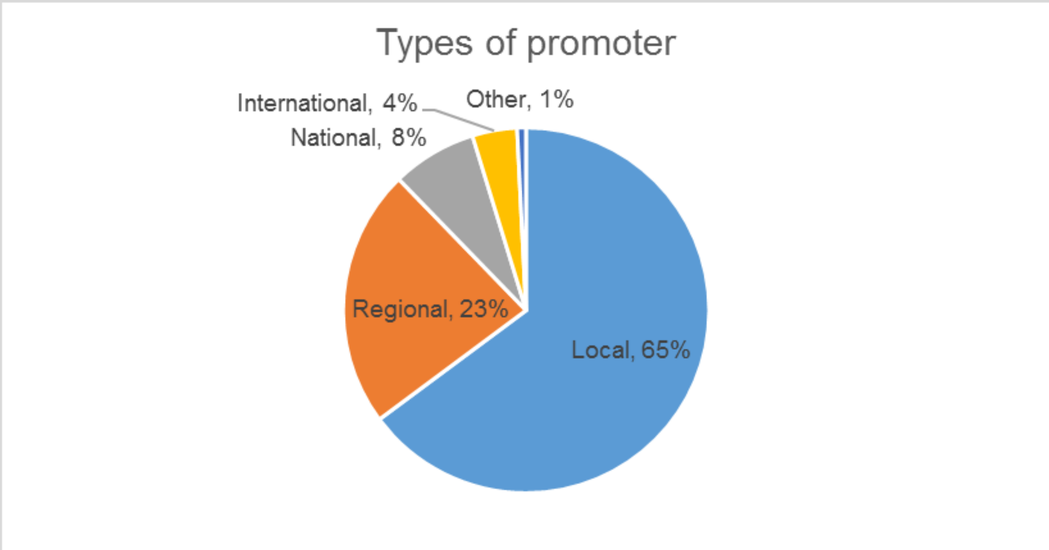

Figure 68: Type of promoter who responded to the promoter survey

Venue survey

In total, 464 unique venues participated in the UK Live Music Census, either by completing a venue survey, allowing data to be collected on the snapshot census date and/or completing a short follow-up venue survey. 319 online surveys were started by individual venues with 180 fully completed. 164 venue observation surveys were carried out in the snapshot cities on the snapshot census date (9-10 March; Liverpool on 1-2 June). Note that some venues were visited more than once; for example, if a theatre had a matinee and evening performance. The majority of venues participating in the census in 2017 are in Scotland, the South East, the North East, and Yorkshire and Humber, reflecting the focus on the seven snapshot cities.[144]

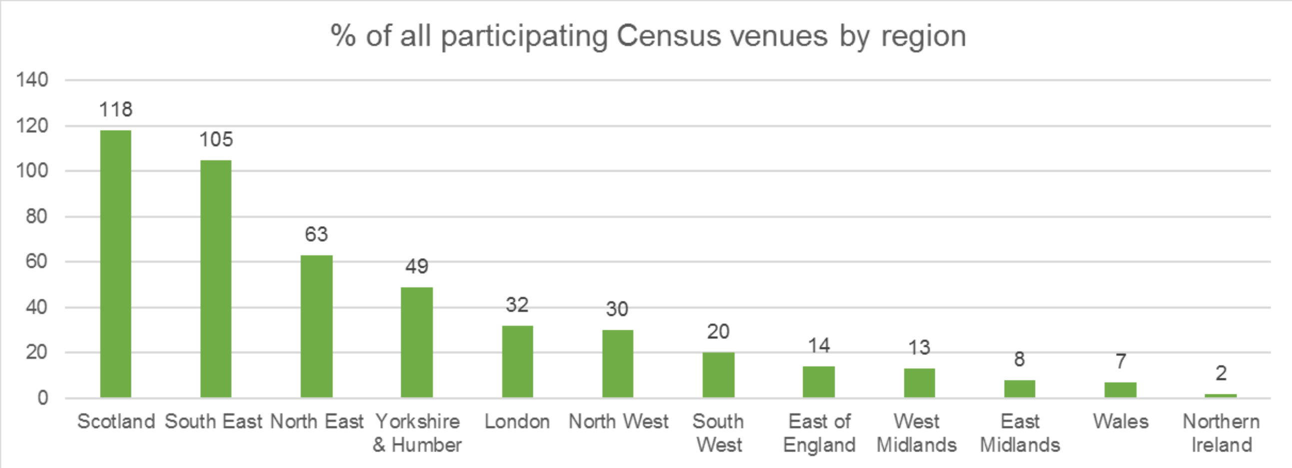

Figure 69: Percentage of all participating census venues by region

Venue data comes from three sources: 1) venue observation carried out by volunteers on the snapshot census date; 2) online survey; and 3) short follow-up surveys. For data analysis purposes, the surveys were combined in the following order: long online venue survey + short follow-up survey + venue observation survey from the snapshot census date (including Liverpool), i.e. if a question was answered in both the online survey and follow-up survey then the online survey response has been kept. Venues which appeared in more than one survey have been combined in order to provide one overall dataset for that venue. Note that in the venue survey, the venue type was listed as 'small/large club' whereas in the audience, musician, and promoter survey the venue type was listed as small/large (night)club; venue types have thus been manually updated in the venue dataset so that venue types are consistent across the surveys. The venue typology has been modified since the 2017 census took place. See http://uklivemusiccensus.org/#glossary

The chart below shows the venue types participating in the census and also in each city (combined snapshot census date with online survey). Overall, then, 29% of all participating venues were bars/pubs,18% were small music venues, and 8% were churches/places of worship.

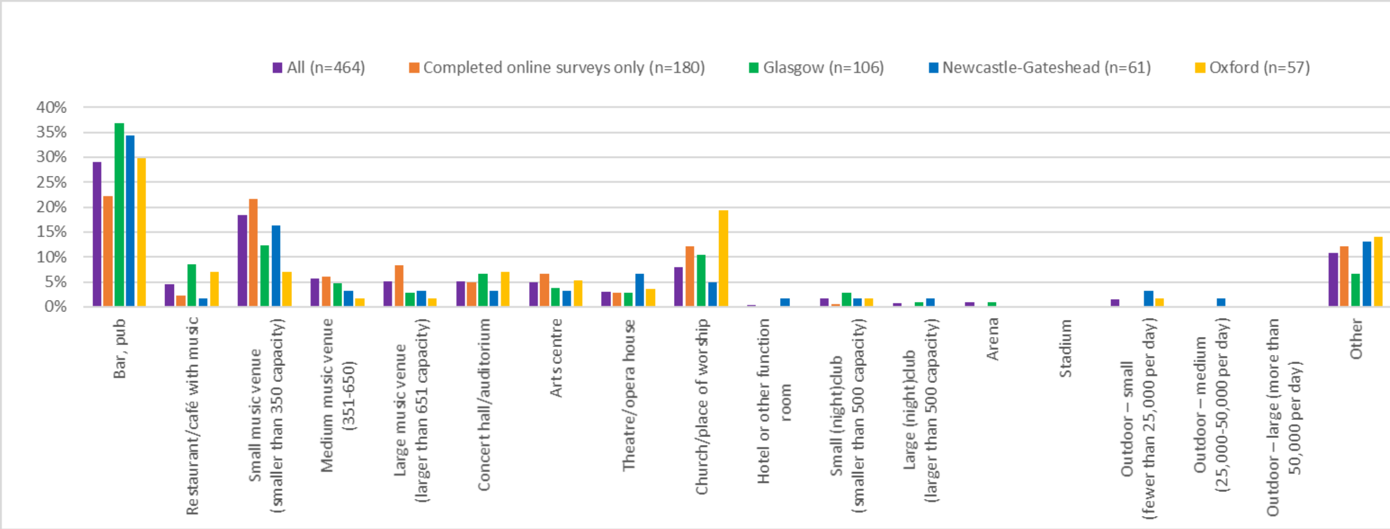

Figure 70: Venue types of all participating census venues by snapshot city

The median capacities for venue types participating in the census are as follows (excluding those venue types for which we received low returns):[145]

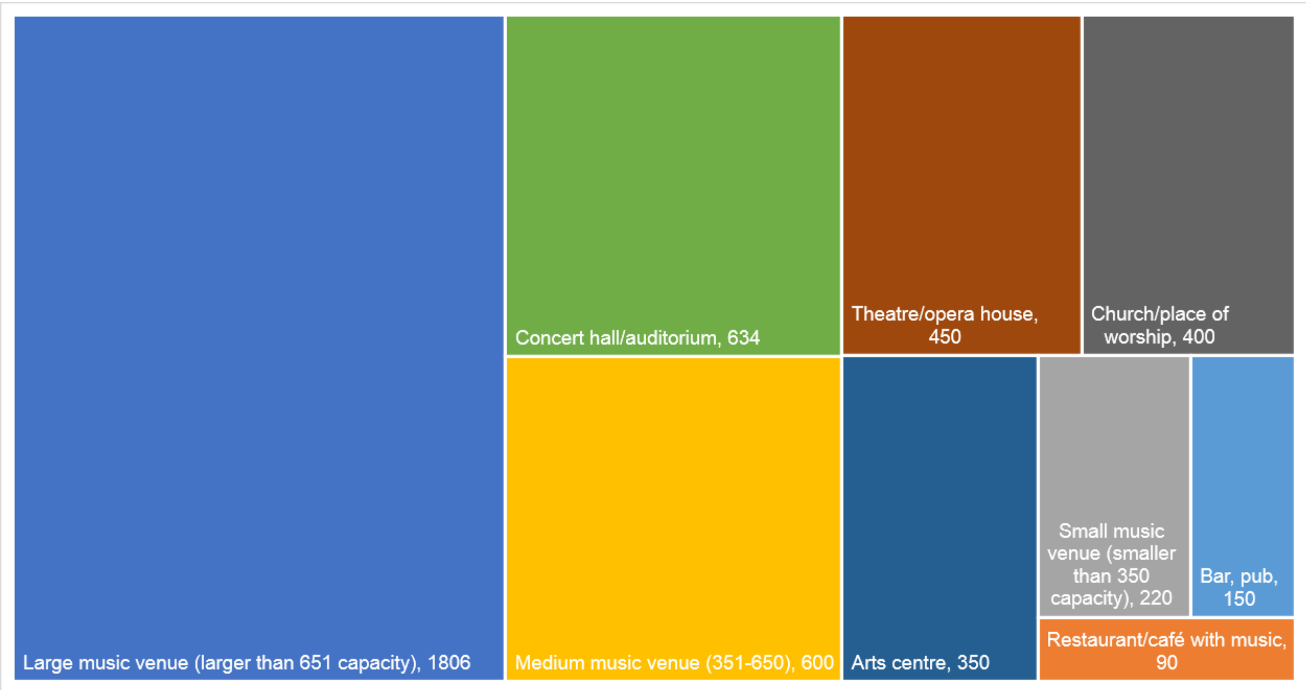

Figure 71: Median capacities of participating census venues

Appendix 2: Definitions

Defining live music events and venues

Defining what counts as live music is not a straightforward task. We appreciate that there are some grey areas as to what constitutes a live music event but, after consultation with stakeholders (see Appendix 3), we agreed on the following definition for the UK Live Music Census:

A live music event is one in which musicians (including DJs) provide music for audiences and dancers gathering in public places where the music is the principal purpose of that gathering.

For a live music activity where the purpose was less clear – a singer in a restaurant or a DJ in a nightclub, for example – it was included in the census if the event was advertised as a live music event (e.g. jazz at the Ashmolean Restaurant) and/or the performer was named (e.g. Carl Cox at Fabric).

It is also worth bearing in mind that a live music event, by its nature, needs:

- A place in which to happen;
- Performers;
- An audience;
- A catalyst – someone or something to bring these things together; and
- Appropriate technology to enable the event to happen, such as instruments or microphones.

Hence the live music activity in question should also have these five elements (Frith 2012).

Similarly, defining the type of live music venue is not necessarily clear-cut as many spaces for live music have more than one function. The word ‘venues’ has been used throughout this report but could perhaps be better understood as ‘spaces for live music’ as this then covers both dedicated spaces for live music – such as concert halls and music venues – and those that fulfil an important function in the live music ecology – such as pubs and stadia – but whose primary function is not necessarily as a music venue.

Although a glossary of venue type definitions was provided for the census, it is clear that respondents’ use of ‘small music venue’ across all surveys does not necessarily equate with either our definition or the Music Venue Trust’s definition of a grassroots music venue, but is instead broader and more inconsistent. The Trust’s definition of ‘grassroots’ encompasses *intent* – why the venues do what they do – rather than what a space looks like or how big it is (Whitrick 2017). For the UK Live Music Census, however, it was decided to use a measure that dealt with the requirement of being more easily verifiable from an objective standpoint of an observer unfamiliar with the motivation or intent of the venue operator, in this case size and, to an extent, layout (majority standing or seated events).

List of genres used in the UK Live Music Census 2017

The following list of genres was devised with guidance from our focus groups and from academics including Simon Frith and Dave Laing. As above, defining genre is no easy task. (No list will include every sub-genre or account for matters of interpretation and any list of genres must be kept to within a workable size.) The final list used for the 2017 census was as follows:

Blues, Classical, Country, Dance / electronic, Folk, Grime, Hip hop/rap, Indie, Jazz, Metal, Musical Theatre, Opera/operetta, Pop, Reggae/dub, Rock, Singer/songwriter, Traditional Scottish/Irish, Urban/R&B, World, Multi-genre, e.g. function band, Other.

Based on responses to the 2017 survey, ‘punk’ and ‘experimental’ have been added to the updated list of genres which can be found in the online live music census toolkit (http://uklivemusiccensus.org/#toolkit).

Defining the geographical area of the snapshot cities

We based our snapshot city censuses on local authority region as far as possible, therefore the venue lists only include venues within the local authority region. However, for Newcastle the decision was made to combine Newcastle and Gateshead as it was felt that the significance of Sage Gateshead to the region was such that to not include Gateshead would be an omission.[lxxvi] There is, of course, precedent for combining the two conurbations in this way. The NewcastleGateshead initiative, for instance, is the

[lxxvi] The surveys asked respondents to select the city for which they were completing the survey and for Newcastle-Gateshead the option was Newcastle rather than Newcastle-Gateshead. On the snapshot census date venues were visited in Gateshead as well as Newcastle and it is clear from audience postcodes that those who selected ‘Newcastle’ were from both Newcastle and Gateshead.

public-private partnership supported by Gateshead Council and Newcastle City Council to promote joint culture, business and tourism within the conurbation formed by Newcastle upon Tyne and Gateshead (NewcastleGateshead Initiative 2017).

Venue typology as used in March 2017 census

NOTE THAT THIS VENUE TYPOLOGY HAS BEEN UPDATED SINCE THE MARCH 2017 CENSUS AND IS ONLY INCLUDED HERE FOR REFERENCE PURPOSES. For the new list of venues types see the glossary on our website.[lxxvii]

- Bar, pub (20-100) – main focus is alcohol sales with occasional music
- Restaurant/café with music (20-100) – main focus is food with occasional music
- Small music venue (<350) – dedicated music venue, mainly standing gigs
- Medium music venue (351-650) – dedicated music venue, mainly standing gigs
- Large music venue (651-5,000) – dedicated music venue, mainly standing gigs
- Concert hall (200-3,000) – dedicated music venue, mainly seated gigs
- Arts centre (200-2,000) – multi-arts, multi-purpose venue
- Theatre/opera house (500-2,500) – mainly theatre with some live music/opera
- Church/place of worship – place of worship which hosts live music events beyond its regular services

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lxxvii http://uklivemusiccensus.org/#glossary

- Small club (<500) – dedicated club, mainly for dancing
- Large club (>500) – dedicated club, mainly for dancing
- Other (20-1,000, including town/village hall, community centre, student union) – venues which are used for live music occasionally
- Arena (5,000-25,000) – large, covered, multi-purpose arena or conference centre
- Stadium (5,000-100,000) – large, usually uncovered, main purpose usually for sports
- Outdoor – small (<25,000)
- Outdoor – medium (25,000-50,000 per day)
- Outdoor – large (>50,000 per day)

Appendix 3: List of focus group participants

Note that this is not the complete list of focus group participants as some did not explicitly give consent to be named in this report and so have not been included in the list.

Jacob Adams, Research and Campaigns Manager, Attitude is Everything

Chiara Badiali, Project Manager, Julie’s Bicycle

Tim Brinkhurst, SoulPunk Management

Paul Broadhurst, Head of Night Time and Music, Greater London Authority

Barbara Eifler, Executive Director, Making Music

Joe Frankland, Senior Grants and Programmes Manager, PRS Foundation

Clive Lyttle, Senior Manager - Engagement and Audiences (secondment), Arts Council England

Alex Mann, Acting Live Performance Official, Musicians’ Union

Oliver Morris, Director of Education and Skills, UK Music

Phil Nelson, Industry Liaison & Music Cities Ambassador, British & Irish Modern Music Institute (BIMM) Brighton

Mika Partanan, Senior Business Development Manager, PRS for Music

Jonathan Todd, Chief Economist, BOP Consulting

Beverley Whitrick, Strategic Director, Music Venue Trust

Appendix 4: List of profile interviewees

Alistair McDonald, Founder/Organiser, Chase Park Festival, Gateshead

Chelsea Rixson, Managing Director, Brighton Music Office, Brighton

Chris Cusack, Events/Venue Manager, BLOC+, Glasgow

E W Harris, Musician, New York

Emma Rule, Founder, Musicians Against Homelessness

Gavin Sharp, Chief Executive, Inner City Music (owner/operator of Band on the Wall), Manchester

Guto Brychan, Chief Executive, Clwb Ifor Bach, Cardiff

Ian Stephenson, Musician, North East

Joe Maryanji, Marketing, Promotions, Events and Bookings Manager, The Jacaranda, Liverpool

Michael Farrell, Promoter, Letham Nights, Letham, Fife

Paul Smith, Manager, The Three Tuns, Gateshead

Razor, Musician, London/Brighton

Richard McCallion, Bar Manager, The American Bar, Belfast

Ricky Bates, Venue operator/booker, The Joiners, Southampton

Ronan Munro, Editor, Nightshift, Oxford

Samuel Moore, Music Officer, Arts@Trinity, Leeds

Thomas Caulker, Proprietor, World Headquarters Club, Newcastle upon Tyne

Victoria Larkin, Deputy Director, Oxford Contemporary Music, Oxford

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Endnotes

[1] Professional n=685, semi-professional n=1,028, amateur n=578; the sample size was calculated from respondents who had selected at least organisation within this question. Note that one of the project partners was the Musicians' Union – the UK-wide body for professional musicians – and that the survey was emailed to their members. Making Music, the UK-wide organisation for amateur musicians, took part in the focus groups and also distributed the survey to their members.

[2] Professional n=511; semi-professional n=715; amateur n=363.

[3] Respondents to the survey identifying as professional and semi-professional only. Solo singer: male n=159, female n=72; ensemble singer: male n=72, female n=36; solo instrumentalist: male n=166, female n=54; duo or ensemble player: male n=468, female n=121; orchestral player: male n=88, female n=74. Note that the sample sizes here are less than 100 and that the standard errors are sometimes higher than 3%.

[4] n=527.

[5] n=708.

[6] n=203.

[7] n=353, excludes those who had selected 'not applicable'.

[8] All n=534; professional n=218; semi-professional n=244; amateur n=70; sample sizes were calculated based on whether a respondent answered selected at least one answer within the overall question; respondents could select more than one multiple choice option.

[9] n=2,337, excluding those who selected 'other'. Note that the relatively low response rate from BAME respondents to the surveys could impact on the figures for genres such as

hip hop/rap and reggae/dub. Highlighting the difficulties in classifying genres, it is noticeable here that the ‘other’ category was selected by 5% of overall respondents. Note that this figure of 5% counts only those respondents who only specified another genre which they did not believe was covered by the list of genres on offer but does not include those respondents who selected a primary category and then specified another genre in the ‘other – please specify’ box.

[10] Professionals n=659, respondents could only select one answer.

[11] n=2,053, respondents could select multiple answers; the sample size was calculated from respondents who had selected at least genre within this question. See note above about BAME respondents.

[12] Professionals n=682, respondents could select multiple answers; the sample size was calculated from respondents who had selected at least genre within this question. See note above about BAME respondents.

[13] Semi-professionals n=1,018, respondents could select multiple answers; the sample size was calculated from respondents who had selected at least genre within this question. See note above about BAME respondents.

[14] Professional n=509; semi-professional n=710; amateur n=350. Note that this chart does not show the percentages of respondents who are: at school; employed part-time, in further/higher education, in government work/training scheme, looking after home/family, permanently sick/disabled, unable to work due to short-term illness/injury, unemployed/seeking work, or prefer not to say because returns from the categories were negligible. Also note that ‘employed full-time’ does not necessarily imply that the respondent is employed as a musician.

[15] n=4,426, online and snapshot census date audience interview combined.
[16] 18-34 year-olds n=1,406, 35-64 year-olds n=2,299, over-65s n=374; online and snapshot census date audience interview combined.
[17] n=1,842.
[18] 18-34 year-olds n=664, 35-64 year-olds n=1,738, over-65s n=223; online survey only; average is given as the mean.
[19] 18-34 year-olds n=500, over-65s n=103, online survey only.
[20] 18-34 year-olds n=500, 35-64 year-olds n=1,079, over-65s n=103; online survey only.
[21] n=1,188, excluding those who did not have to resell, i.e. selected 'no'.
[22] n=2,719, online survey only.
[23] n=317 who opted to leave a comment in the comments box in response to the question, 'In the past 12 months, did you buy a music festival or concert ticket for the purpose of reselling it at a profit?' [yes/no].
[24] n=780, online survey only.
[25] n=272, online survey only.
[26] n=179, completed online surveys only due to ambiguity over whether a 'no' response was intentional or not; respondents could select multiple answers. Respondents' venue types were as follows: bar/pub 22%, restaurant/café 2%, small music venue 21%, medium music venue 6%, large music venue 8%, concert hall 5%, arts centre 7%, theatre/opera house 3%, church 12%, other 12%.
[27] n=176, completed online surveys only due to ambiguity over whether a 'no' response was intentional or not; respondents could select multiple answers. Respondents' venue types were as follows: bar/pub 22%, restaurant/café 2%, small music venue 21%, medium music venue 6%,

large music venue 9%, concert hall 5%, arts centre 6%, theatre/opera house 3%, church 13%, other 13%. We recognise that it could have been useful here to examine venue types at a more granular level but it was felt that there was insufficient data to do this in a meaningful way. The list of activities in the chart was based on qualitative data reported in Music Venue Trust (2015) and converted into a multiple choice question.

[28] Receive funding n=25 (note relatively low n value here and standard error higher than 3%); don't receive funding n=116.

[29] n=141, completed online surveys only, respondents could select multiple answers.

[30] n=314.

[31] n=2,190, n calculated from respondents who selected 'yes' to at least one option in the list.

[32] n=605, excluding those who entered zero or did not respond to the question.

[33] n=629, n calculated from respondents who indicated that they had undertaken some voluntary work in live music in the past 12 months; respondents could select multiple answers.

[34] n=176, online survey only due to ambiguity over whether a 'no' response was intentional or not; respondents could select multiple answers.

[35] n=141, completed online surveys only due to ambiguity over whether a 'no' response was intentional or not; respondents could select multiple answers.

[36] n=965 where respondents had taken part in at least one activity in the list (a 'none of the above' option was not available for this question hence the sample size was calculated from respondents who had participated in at least one activity); respondents could select more than one activity.

[37] The discrepancy between the median distance travelled on the census snapshot date and for the last event attended could be due to respondents' power of recall – spatial distance perhaps becoming more difficult to judge the more the temporal distance from the event increases – or because the event recalled by the respondent was more memorable because the respondent had to travel further than usual, or because the respondent recalled a special event (i.e. a one-off concert rather than a weekly pub session) for which they travelled further. The respondents on census snapshot date may have lived in or close to the snapshot cities and therefore did not have as far to travel, whereas the audience online survey covered audiences across the UK who may or may not live in or near a city, and hence the median distance travelled is greater.

[38] n=1,838, online and snapshot census date audience interview combined.

[39] n=2,982, online survey only.

[40] Professionals n=552; semi-professionals n=887; amateurs n=440.

[41] Working musicians n=532; emerging musicians n=234.

[42] n=2,067.

[43] Professional n=620, semi-professional n=949, amateur n=490.

[44] n=1,656.

[45] n=2,121.

[46] n=2,920, online and snapshot census date audience interview combined.

[47] n=173, online and snapshot census date audience interview combined.

[48] Snapshot census date n=1,883; last event attended n=3,026.

[49] n=176, completed online surveys only used to calculate sample size due to ambiguity over whether a 'no' response

was intentional or not; respondents could select multiple answers. Respondents' venue types were as follows: bar/pub 22%, restaurant/café 2%, small music venue 21%, medium music venue 6%, large music venue 9%, concert hall 5%, arts centre 6%, theatre/opera house 3%, church 13%, other 13%.

[50] n=176, completed online surveys only used to calculate sample size due to ambiguity over whether a 'no' response was intentional or not; respondents could select multiple answers.

[51] n=231.

[52] n=3,432, online and snapshot census date audience interview combined.

[53] n=236.

[54] Venues n=169, excluding those who responded 'don't know'. Promoters n=141, completed surveys only due to ambiguity over whether a 'no' response was intentional or not.

[55] n=141, completed surveys only used to calculate sample size due to ambiguity over whether a 'no' response was intentional or not.

[56] n=176, completed online surveys only used to calculate sample size due to ambiguity over whether a 'no' response was intentional or not.

[57] n=2,435, online survey only.

[58] n=595, online survey only.

[59] Musician survey n=528, audience n=805; online surveys only.

[60] n=399, online and follow-up venue survey combined.

[61] n=401, online and follow-up venue survey combined.

[62] n=2,921, online survey only, respondents could select multiple answers; n calculated if respondents selected at least one venue type within the question.

[63] n=1,623, respondents could select multiple answers; n calculated if respondents selected at least one venue type within the question.
[64] Professional n=520, semi-professional n=733, amateur n=365.
[65] n=277 combined ‘emerging’ and ‘formative years’ categories; respondents could select multiple answers; n calculated if respondents selected at least one venue type within the question.
[66] n=256, respondents could select multiple answers; n calculated if respondents selected at least one venue type within the question.
[67] n=319, online and follow-up venue survey combined; n calculated if respondents selected at least one venue type within the question.
[68] n=70. Note that the sample size here is less than 100 and that the standard error is higher than 3%.
[69] Bars/pubs n=102, restaurants/cafes n=12; small music venues n=82; medium music venues n=22; large music venues n=23; concert halls/auditoria n=22; arts centres n=22; theatre/opera house n=13; churches/places of worship n=35; ‘other’ n=47. Note that the sample size for the majority of individual venue types here is less than 100 and that the standard errors are sometimes higher than 3%.
[70] n=551.
[71] Planning and property n=264, noise-related complaints n=268, licensing issues n=260, parking/loading issues n=263, online and follow-up venue survey combined; increased business rates n=185, online survey and follow-up surveys combined.
[72] Small music venues: planning and property n=55, noise-related complaints n=55, licensing n=54, parking/loading n=55 (online and follow-up venue survey combined); increased business rates n=43 (online survey only).

Bars/pubs: planning and property n=72, noise-related complaints n=74, licensing n=71, parking/loading n=73 (online and follow-up venue survey combined); increased business rates n=41 (online survey only). Note that the sample size for individual venue types is less than 100 and that the standard errors are sometimes higher than 3%. See previous endnote for sample sizes for all respondents to the venue survey for this question.

[73] Urban: planning and property n=134, noise-related complaints n=134, licensing n=132, parking/loading n=133, increased business rates n=127 (bar/pub 23%, restaurant/café 2%, small music venue 19%, medium music venue 4%, large music venue 11%, concert hall 6%, arts centre 7%, theatre/opera house 3%, church 13%, arena 1%, small (night)club 3%, large (night)club 1%, other 8%. Rural n=26 (bar/pub 35%, small music venue 15%, medium music venue 15%, church 4%, arts centre 4%, small (night)club 19%, other 8%). Responses from online survey only as the urban/rural question was only asked in the online survey. Note the relatively low n values here for rural venues and standard errors sometimes higher than 3%.

[74] n=244, online survey only.

[75] All venues n=186; small music venues n=43; bars/pubs n=40; online survey only. Note the relatively low n values here for individual venue types and standard errors sometimes higher than 3%.

[76] All venues n=185; small music venues n=43; bars/pubs n=40; online survey only. Note the relatively low n values here for individual venue types and standard errors sometimes higher than 3%.

[77] All venues n=185; small music venues n=42; bars/pubs n=41; online survey only. Note the relatively low n values here for individual venue types and standard errors sometimes higher than 3%.

[78] All venues n=186; small music venues n=43; bars/pubs n=41; online survey only. Note the relatively low n values here for individual venue types and standard errors sometimes higher than 3%.
[79] All venues n=186; small music venues n=42; pubs/bars n=41; online survey only. Note that the sample sizes for individual venue types are less than 100 and that the standard errors are sometimes higher than 3%.
[80] Bars and pubs n=38; large music venue n=15, small music venue n=42. Note that the sample sizes for individual venue types are less than 100 and that the standard errors are sometimes higher than 3%.
[81] Urban: diminishing audiences n=128, increasingly competitive environment between venues and promoters n=128, increased size/number of music festivals n=128, cost of paying bands n=127, cost of labour/staff wages n=127, noise limiter/sound level meter n=123, closure of other local venues n=125. Rural n=26. Responses from online survey only as the urban/rural question was only asked in the online survey. Note the relatively low n values here for rural venues and standard errors are sometimes higher than 3%.
[82] n=260, online survey only.
[83] n=41, online survey only. Note that the sample size here is less than 100 and that the standard error is higher than 3%.
[84] n=188, excludes those respondents to the venue online survey who selected ‘n/a - we don't sell alcohol', 'n/a - we always have live music/are only open for gigs' and 'don't know'.
[85] n=264, online survey only.
[86] n=161. Note that the respondents to the venue survey here consisted of 20% bars/pubs, 23% small music venues, 6% medium music venues, 9% large music venues, 12%

churches/places of worship, 12% ‘other’, 5% concert halls/auditoria, 7% arts centres, and 2% theatres/opera houses.

[87] n=27, respondents could select multiple answers. Note that the sample size here is less than 100 and that the standard error is higher than 3%.

[88] n=176, completed online surveys only due to ambiguity over whether a ‘no’ response was intentional or not. Note that the respondents to the venue online for this question consisted of 22% bars/pubs, 21% small music venues, 6% medium music venues, 9% large music venues, 13% churches/places of worship, 13% ‘other’, 5% concert halls/auditoria, and 6% arts centres.

[89] n=141, completed online surveys only due to ambiguity over whether a ‘no’ response was intentional or not.

[90] n=177, completed online surveys only due to ambiguity over whether a ‘no’ response was intentional or not. Note that the respondents to the venue online for this question consisted of 23% bars/pubs, 21% small music venues, 6% medium music venues, 8% large music venues, 12% churches/places of worship, 12% ‘other’, 5% concert halls/auditoria, and 6% arts centres.

[91] n=141, completed online surveys only due to ambiguity over whether a ‘no’ response was intentional or not.

[92] n=257.

[93] Paying bands n=170; diminishing audiences n=167; competitive environment n=165.

[94] n=161.

[95] Respondents who answered the question n=116, percentage derived from counting the number of mentions of ‘venue’ in open-ended responses.

[96] Respondents who answered the question n=108, percentage derived from counting the number of mentions of ‘venue’ in open-ended responses.

[97] n=1,674.
[98] n=1,684.
[99] Professionals n=552.
[100] n=1,598, completed surveys only. Note that we had hoped to be able to discuss musicians' barriers to success at a more local level but we had optimistically hoped for a larger return than what we received.
[101] n=2,169.
[102] Professionals n=646; semi-professionals n=1,002.
[103] Professionals n=314, percentage derived from coding open-ended responses.
[104] n=811, excludes those who selected 'not sure/don't know' (45% of 1,465 respondents who answered the question selected not sure/don't know).
[105] All professional/semi-professional respondents to the musician survey who answered this question n=787; classical n=120; rock n=160; n was calculated if the respondent answered 'yes' to at least one type of deal within the question, including not applicable.
[106] Rock n=160, classical n=120; excluding amateur.
[107] All n=921, professional/semi-professional n=787; respondents could select multiple answers.
[108] n=1,633. 28% had applied for funding, 70% had not applied for funding, and 2% preferred not to say.
[109] n=463, excluding those who selected 'prefer not to say'.
[110] Classical n=371, folk n=115, jazz n=145, rock n=303. Note that sample sizes include professional, semi-professional and amateur musicians; percentages refer to 'yes' responses as opposed to 'no' or 'prefer not to say'.
[111] Less than 50% original music n=152; more than 50% original music n=118.
[112] Less than 50% n=431; more than 50% n=224.
[113] Respondents who answered the question n=114; online venue survey only; percentages derived from open-ended

responses therefore venues could make more than one comment and may appear more than once in findings.

[114] Respondents who answered the question n=97, based on open-ended responses.

[115] Respondents who answered the question n=97, based on open-ended responses.

[116] Increasingly competitive environment (n=39), increased business rates (n=38), increased size/number of music festivals (n=39), diminishing audiences (n=38), noise-related complaints (n=71), licensing issues (n=68), parking/loading issues (n=69), planning and property development (n=68), noise limiter/sound level meter (n=37), closure of other local venues (n=38). Note that the sample size here are sometimes less than 100 and that the standard errors are sometimes higher than 3%.

[117] n=86. Note that the sample size here is less than 100 and that the standard error is higher than 3%.

[118] All UK n=2,904; Glasgow n=279; online survey data only, sample size based on respondents selecting at least one genre from the list.

[119] All n=4,496; Glasgow n=593, online survey and audience interview combined. Percentages calculated by subtracting from 100% those respondents who stated that they attended zero events in a month. In cases where a respondent did not enter a value we have assumed zero attendance.

[120] n=366, online and snapshot census date audience interview combined; respondents could select multiple answers; n calculated if respondents selected at least one venue type within the question.

[121] n=356, online and snapshot census date audience interview combined.

[122] n=366, online and snapshot census date audience interview combined.

[123] Increasingly competitive environment (n=24), increased business rates (n=24), increased size/number of music festivals (n=24), noise-related complaints (n=43), parking/loading issues (n=41), diminishing audiences (n=24), planning and property development (n=41), licensing issues (n=43), noise limiter/sound level meter (n=23), closure of other local venues (n=23). Note that the sample sizes here are less than 100 and that the standard errors are sometimes higher than 3%.
[124] n=51. Note that the sample size here are less than 100 and that the standard errors are sometimes higher than 3%.
[125] All UK n=2,904; Newcastle-Gateshead n=125; online survey data only, sample size based on respondents selecting at least one genre from the list.
[126] All n=4,496; Newcastle-Gateshead n=511, online survey and audience interview combined. Percentages calculated by subtracting from 100% those respondents who stated that they attended zero events in a month. In cases where a respondent did not enter a value we have assumed zero attendance.
[127] n=436, online and snapshot census date audience interview combined; respondents could select multiple answers; n calculated if respondents selected at least one venue type within the question.
[128] n=418, online and snapshot census date audience interview combined.
[129] n=432, online and snapshot census date audience interview combined.
[130] Increasingly competitive environment (n=38), parking/loading issues (n=39), increased size/number of music festivals (n=23), increased business rates (n=22), noise-related complaints (n=40), diminishing audiences (n=23), noise limiter/sound level meter (n=21), planning and

property development (n=38), licensing issues (n=37), closure of other local venues (n=22). Note that the sample sizes here are less than 100 and that the standard errors are sometimes higher than 3%.

[131] n=47. Note that the sample size here is less than 100 and that the standard error is higher than 3%.
[132] All UK n=2,904; Oxford n=173; online survey data only, sample size based on respondents selecting at least one genre from the list.
[133] All n=4,496; Oxford n=352, online survey and audience interview combined. Percentages calculated by subtracting from 100% those respondents who stated that they attended zero events in a month. In cases where a respondent did not enter a value we have assumed zero attendance.
[134] n=200, online and snapshot census date audience interview combined; respondents could select multiple answers; n calculated if respondents selected at least one venue type within the question.
[135] n=199, online and snapshot census date audience interview combined.
[136] n=202, online and snapshot census date audience interview combined.
[137] n=1,609.
[138] Professional n=511; semi-professionals; n=724; amateurs n=366.
[139] n=1,576.
[140] n=1,532.
[141] n=1,525.
[142] Type of musician n=2,357; career level n=2,358.
[143] n=253.
[144] n=462.
[145] Bar, pub n=115; restaurant/café with music n=19; small music venue (under 350 capacity) n=85; medium music

venue (351-650) n=26; large music venue (larger than 651 capacity) n=24; concert hall/auditorium n=24; arts centre n=23; theatre/opera house n=14; church/place of worship n=32. Note that insufficient data was available to be able to calculate average capacities for hotels/other function rooms, small nightclubs, large nightclubs, arenas, stadia, and outdoor. Also note that some of the sample sizes here are less than 100 and that the standard errors are sometimes higher than 3%. Venue capacity was based on the following hierarchy of data: 1) venue online survey, 2) venue follow-up survey and 3) venue observation survey.