UK LIVE MUSIC CENSUS

Valuing live music: The UK Live Music Census 2017 report

EXECUTIVE SUMMARY

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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.

About Live Music Exchange

Brennan, Behr, Cloonan and Webster are co-directors of Live Music Exchange (LMX), 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 (livemusicexchange.org) and organises knowledge exchange events which bring together academics and industry practitioners.

livemusicexchange.org

Download full report

uklivemusiccensus.org/#report

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 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). 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. 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 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.

The UK Live Music Census provides further evidence that smaller venues 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 is the executive summary of the full report, published in February 2018, which is available from our website (uklivemusiccensus.org/#report) and which sets out the main findings of the census. The report draws on survey data, both quantitative and qualitative, to bridge the current knowledge gap about 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. 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. 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.

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.

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.

Lord Clement-Jones

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 Valued 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 said that they 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 live music 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 one-third (29%) of venue online survey respondents identifying as small music venues and 27% of all 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 one-third (29%) of 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.

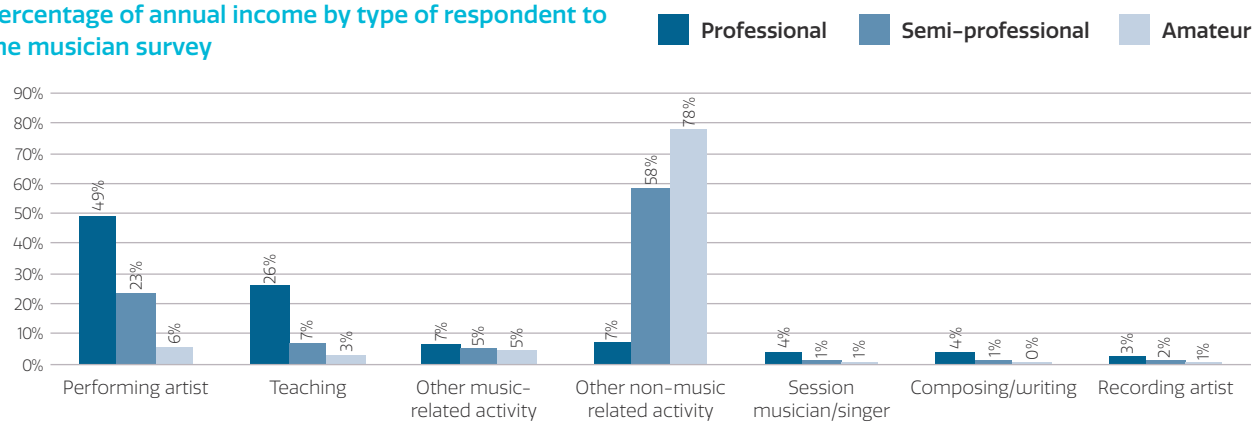
Two thirds (66%) of respondents to the musician survey who worked unpaid for what the engager termed 'exposure' believe that the exposure did not benefit their career.

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.

The economic value of live music

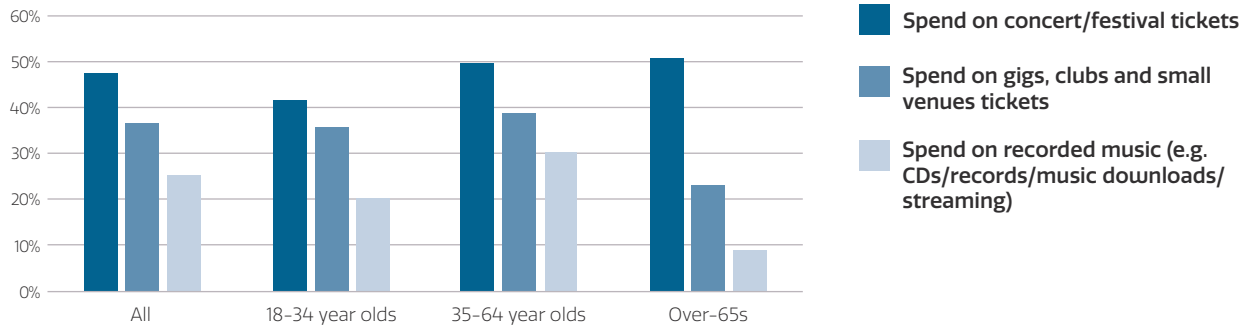
Live music appears to be one of the real success stories of the past decade, its revenue overtaking that of recorded music in the UK in 2008. Since 2014 UK Music has published figures in its now annual *Measuring Music* report that appear to suggest that live music is now consistently the largest generator of revenue in the UK's music industries. As the chart below illustrates, based on UK Live Music Census data, live performance forms a key part of respondents to the musician survey's annual income, significantly more so than income from recording.

Percentage of annual income by type of respondent to the musician survey



It is not only musicians for whom live music is more economically significant than recorded music. 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: nearly half (47%) of respondents to the audience survey spend more than £20 on tickets for concert/festivals each month, while only a quarter (25%) spend the same on recorded music. 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.

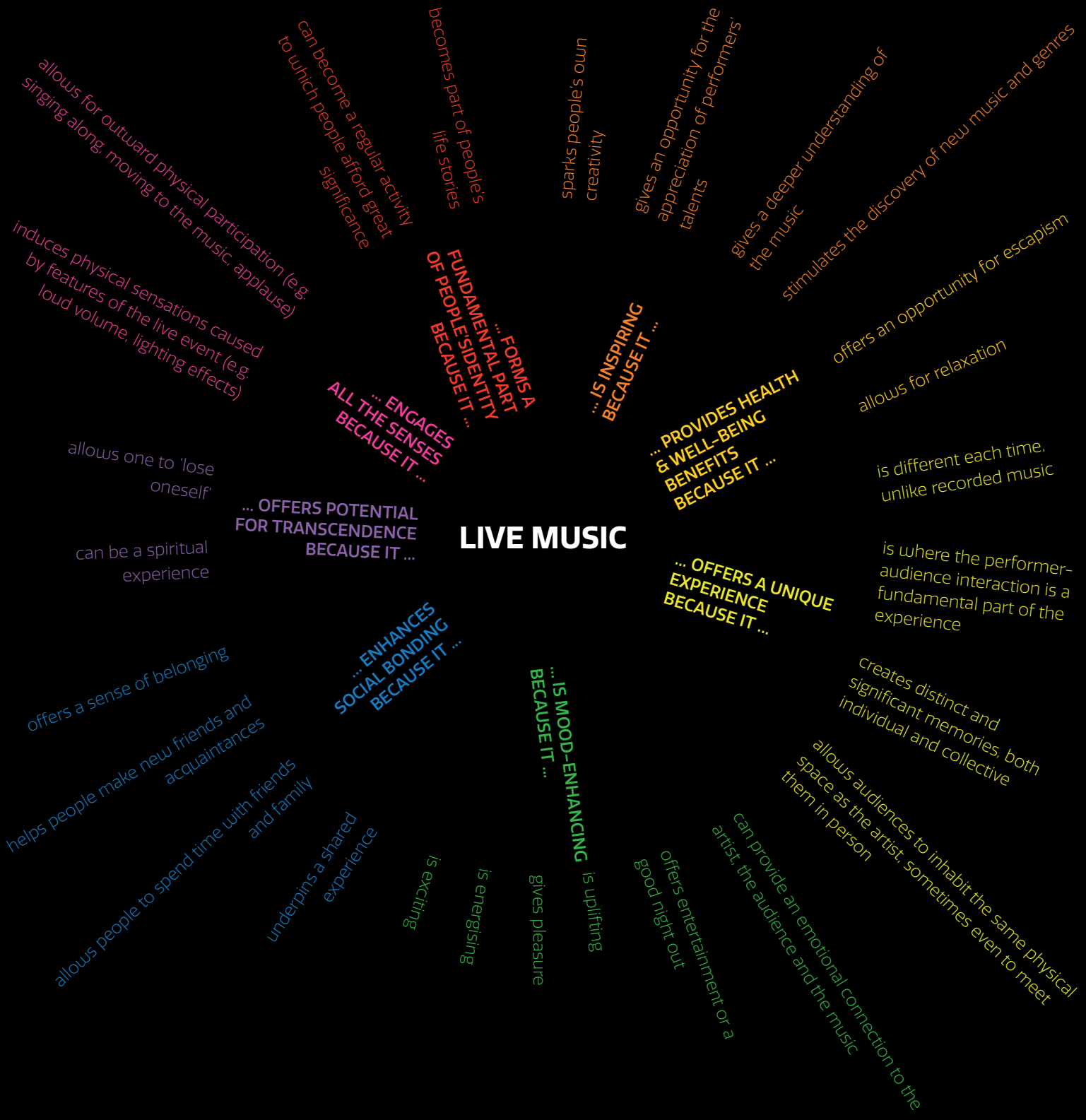
Audience spend over £20 per month on tickets and recorded music by age group of respondents to the audience survey



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. The UK Live Music Census found that 44% of respondents to the audience online survey had 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, 41% resold the ticket at face value and only 2% resold it for profit. 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. While it is undeniable that demand exists for customers to be able to return unwanted tickets, the question then becomes: who is reselling the ticket and for what purpose? The census showed that it 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. With this in mind, 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 continues its investigations in this area.

The social and cultural value of live music

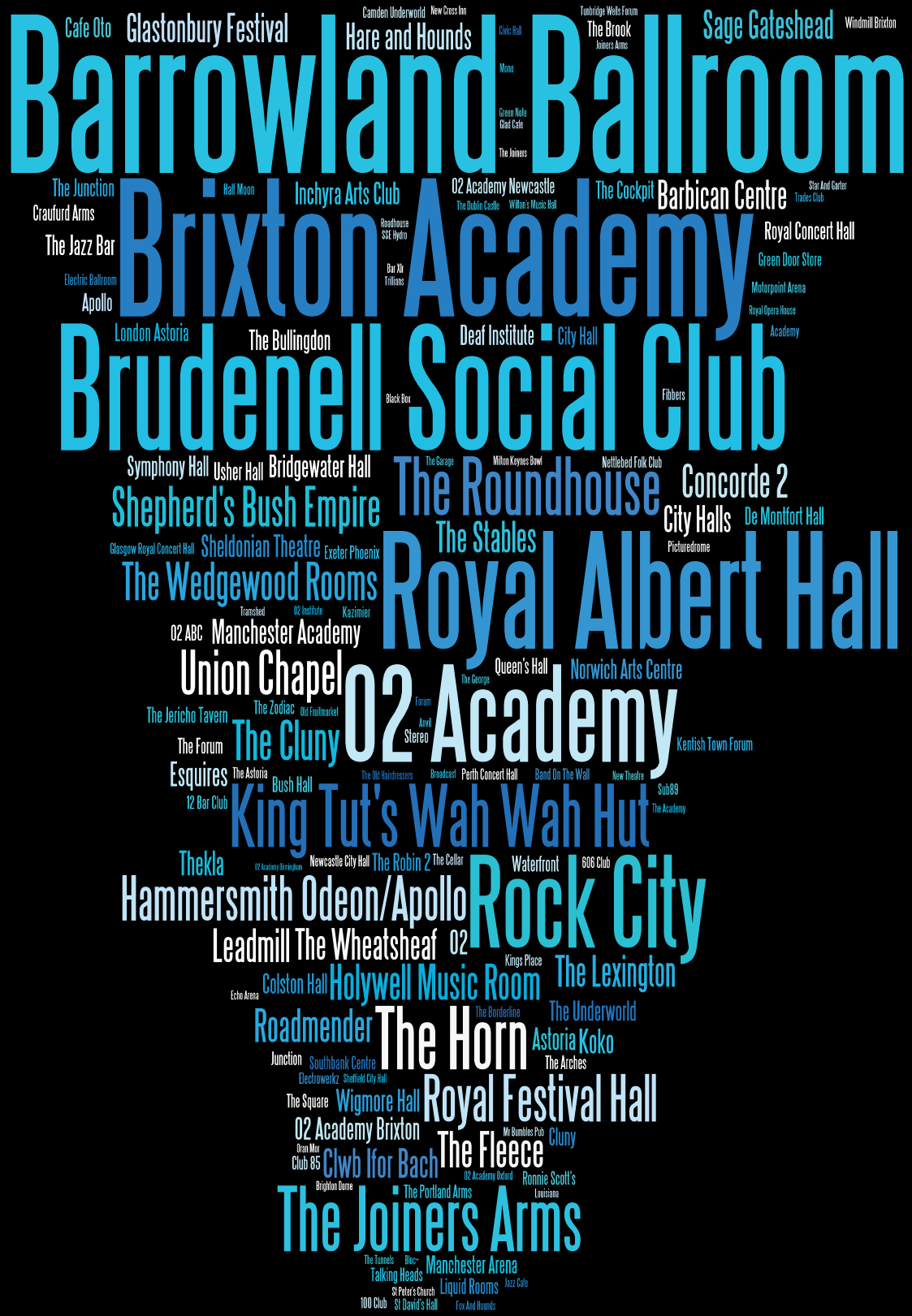
To better understand the social and cultural value of live music, the UK Live Music Census asked respondents to the audience survey: 'What do you get out of live music? What would you say are the most important (intangible) things that you take away from live music?' Hundreds of them responded, sometimes movingly and often eloquently. The diagram below summarises the main themes around social and cultural value that emerged from the coding and analysis to show that live music ...



Thus live music can be socially and culturally valuable in a variety of ways, both intrinsically and instrumentally (and, frequently, both). 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.

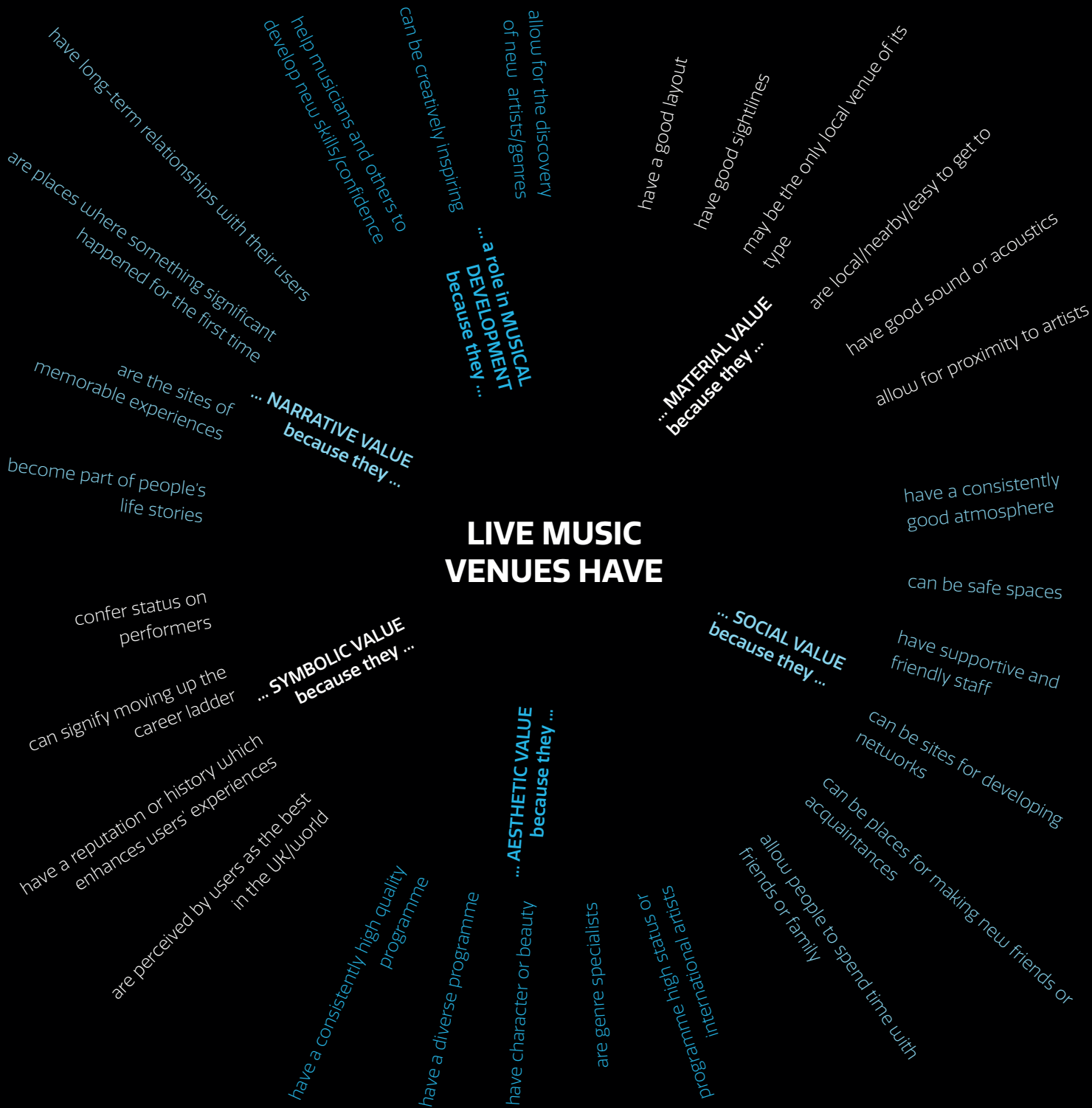
Valuing venues

Audiences and musicians were asked to name a venue which has been particularly significant to them and to say *why* it has been significant.



The word cloud above shows that venues are valued from across the whole spectrum, from London's Royal Albert Hall and Brixton Academy to Leeds' Brudenell Social Club and Glasgow's Barrowland Ballroom. 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.

The diagram below summarises the main themes within the combined audience and musician data to show that live music venues are valued in the following ways:



More than just music

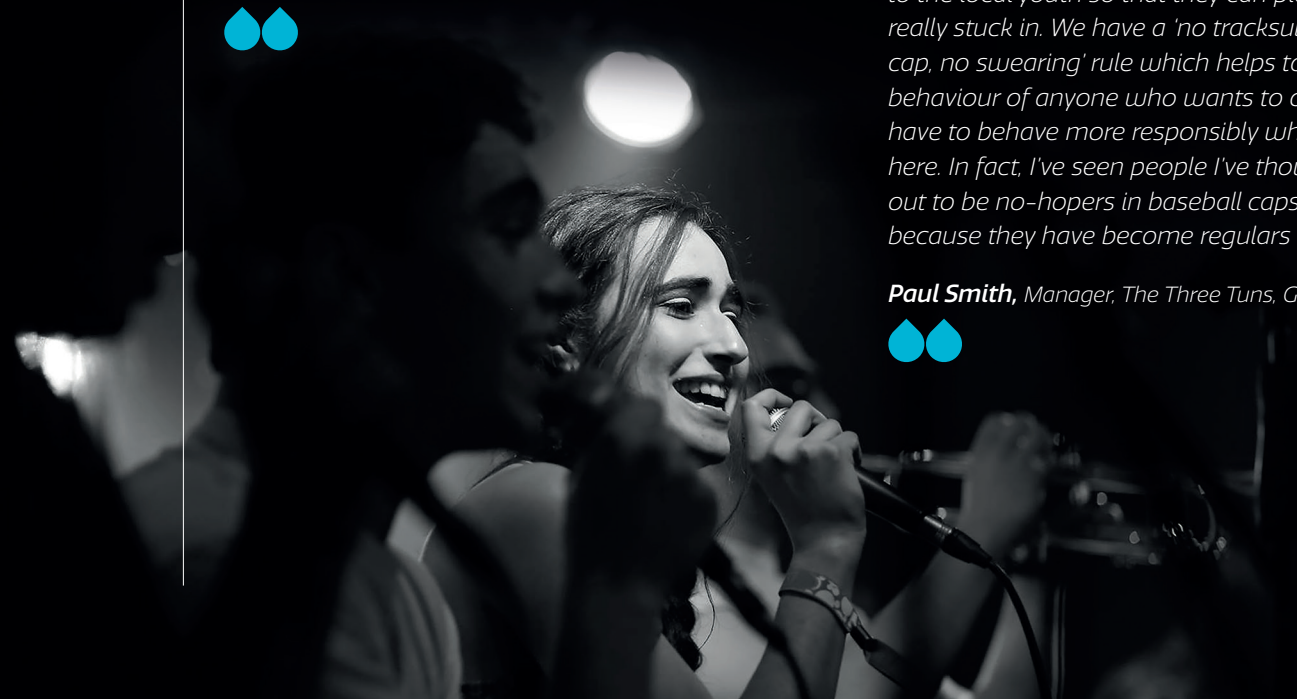
As well as the coded and themed data summarised on the previous pages, the UK Live Music Census also collected data on the social and cultural value of live music and its key stakeholders (musicians, audiences, venues and promoters).

Charity work

The census asked questions to all four key stakeholders about volunteering and charity work. It found that two-thirds (66%) of respondents to the online venue survey and 48% of respondents to the promoter survey said that they do (unspecified) charity work. 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. 29% of respondents to the audience online survey indicated that they had volunteered within the live music sector over the past 12 months.

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 ... In 2016 [Musicians Against Homelessness] 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 and Simon Community in Northern Ireland. 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.

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



Education work

As seen in the diagram on the previous page, live music venues can play an educational role in audiences' and musicians' musical development. Furthermore, the census found that 57% of respondents to the online venue survey have formal or informal links with educational communities such as universities and colleges, and 40% provide volunteering and internship opportunities. We ***recommend*** that local authorities encourage links between education communities and local live music venues and promoters. We also ***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. 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.

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.

Paul Smith, *Manager, The Three Tuns, Gateshead*

Accessibility for Deaf and disabled customers

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. 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.

However, 86% of respondents to the promoter survey and nearly half (47%) of respondents to the online venue survey (or their staff) have not received Disability Awareness training, and only 26% of the venues provide information on their website specifically for Deaf and disabled customers.

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. 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.

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

A catalyst for travel

Live music can be a driver of 'music tourism' and migration. The median distance travelled by all respondents to the audience online survey for the last event that they attended was 20 miles (round trip) while 52% travelled 20 miles or more.

One of the most striking findings of the census is that nearly one in five (18%) of respondents to the musician survey moved to their current permanent place of residence specifically for more musical opportunities. For professional musicians this figure rises to nearly a third (31%). Rehearsals and performances also see musicians travelling considerable distances. The median distance travelled each month to perform live music by those musicians who self-identify as professional is 300 miles. 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. Live music therefore has a significant carbon footprint. While progress is being made, it is clear from the census results that more work needs to be done. For example, 61% of respondents to the online venue survey do not have an up-to-date environmental policy.

With the above points in mind, we ***recommend*** that venues and promoters, particularly at the smaller end, 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, and work with organisations such as Julie's Bicycle and Attitude is Everything to do so.

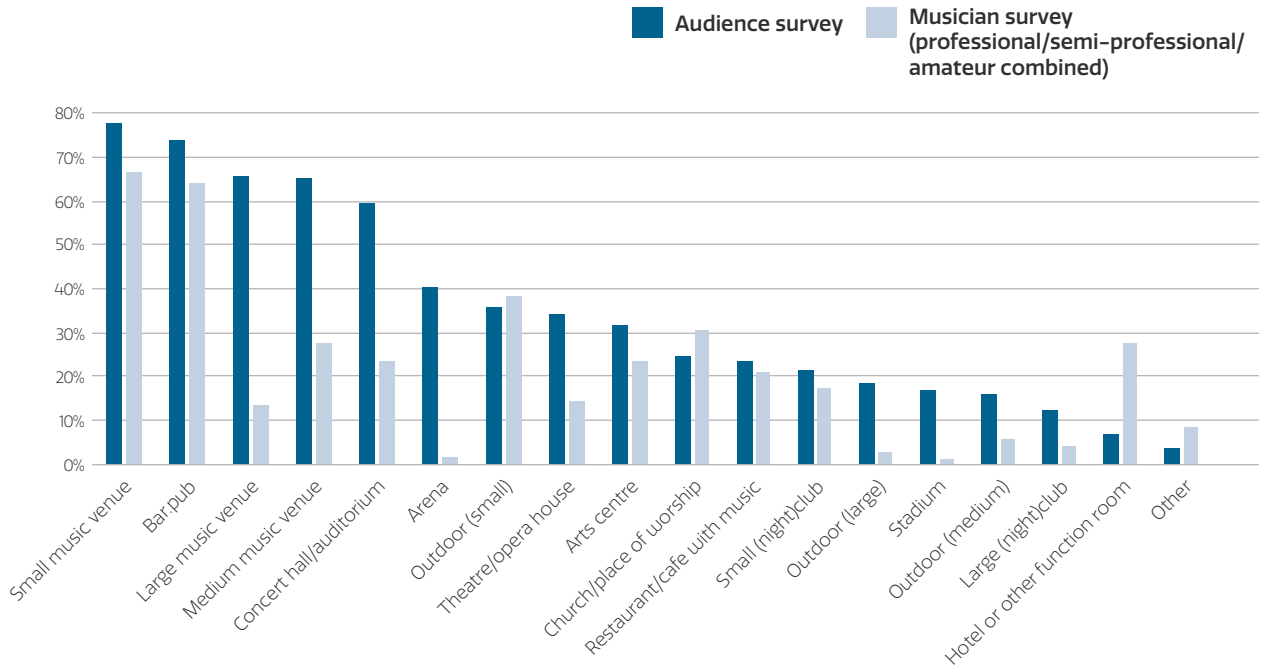
Over the years lots of bands have played at the venue, including Coldplay, The Strokes, The Killers and Kasabian ... The local council is now very supportive and see music as something which brings jobs and tourism into the city ... People stay in hotels, go out for food in town, and you multiply that 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.

Guto Brychan, *Chief Executive, Clwb Ifor Bach, Cardiff*

Valuing smaller spaces for live music

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. Keeping in mind the introduction to this report, this section will focus on smaller spaces for live music to better understand the relationship of these spaces to the wider music ecology.

Venue types visited/performed in by respondents to the audience and musician survey for live music in the last 12 months



As the chart above illustrates, 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. Medium and large music venues (both 65%) and concert halls/auditoria (59%) were also key sites of live music attendance.

Smaller spaces for live music are also important for musicians and the findings further highlight that they are the 'bread and butter' venues for most local musicians. 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 at outdoor events (smaller than 25,000 attendees per day); and 31% had performed in churches or other places of worship. 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.

Smaller spaces for live music therefore perform a key role within the overall live music ecology in terms of both attendance and performance. With this in mind, 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. Furthermore, 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 by naming such venues directly in policies.

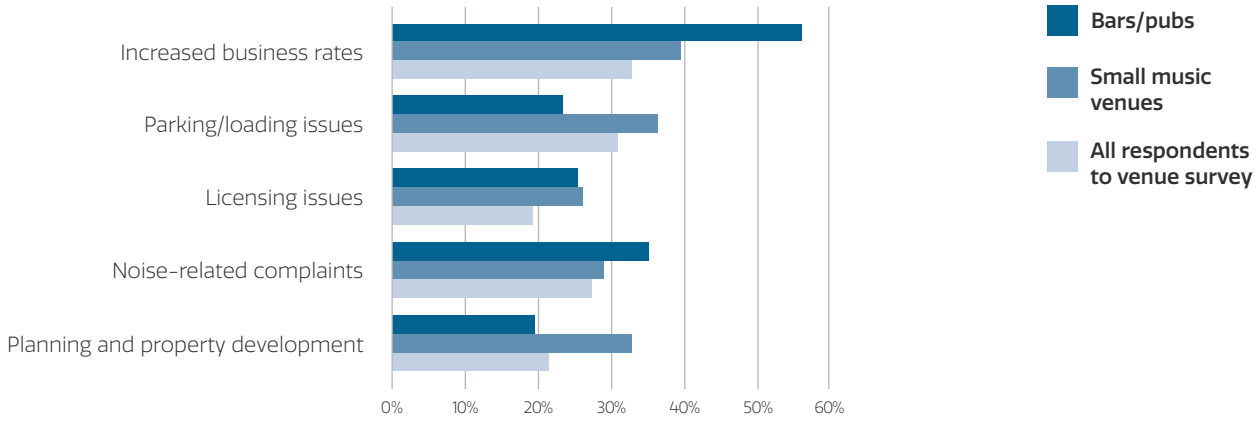
With the ideas around value explored in the previous pages in mind, the next section will examine some of the challenges to venues and their users.

Challenges for venues

In recent years, there has been widespread concern that the smaller end of the venue spectrum in particular is facing a 'perfect storm' of issues which is affecting their viability and sustainability. The UK Live Music Census found that:

- Two out of every five (40%) venue online survey respondents identifying as small music venues, over half (56%) of bars/pubs. and a third (33%) of all venue survey respondents said that increased business rates had an extreme, strong or moderate negative impact on their live music 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 one-third (29%) of venue online survey respondents identifying as small music venues and 27% of all venue survey respondents said that noise-related complaints had a negative impact in the last 12 months;
- Nearly a third (31%) of all respondents to the venue survey had parking/loading issues.

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



Based on the evidence above and in the full report highlighting the impact of property development and noise complaints on venues, 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 (NPPF) for England. This is following the commitment of the Ministry of Housing, Communities & Local Government to adopt the principle into the NPPF for England, and the commitment of the Welsh Government and the Mayor of London to adopt the principle in their planning policies. We also ***recommend*** that devolved administrations 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. Furthermore, we ***recommend*** that the UK government reviews business rates for music venues and other smaller spaces for live music.

At a more local level, 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. We also ***recommend*** that local authorities introduce free or subsidised parking permits for load-ins and load-outs at agreed venues.

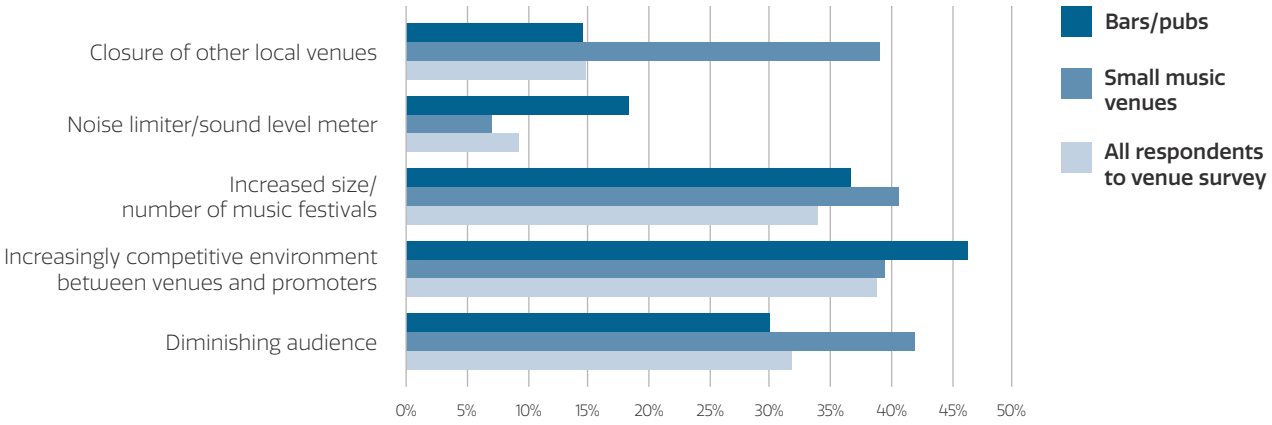
[We need an] emergency action plan to review business rates for all grassroots music venues. Our new rateable value has just quadrupled from £17,500 to £72,000. WHY??

Medium-sized music venue (351-650 cap), *hosting/promoting live music for over 30 years, South West*

Other challenges for venues are around licensing. 20% of those venues which responded to the online venue survey are not open to under-18s or are only open with some exceptions, meaning that 1 in 5 venues are mostly inaccessible to under-18s, the next generation of live music fans and artists. With this in mind, we ***recommend*** that local authority and police licensing boards and/or forums ensure that licensing restrictions do not overly inhibit venues' ability to host live music events for under-18s.

Venues also have a duty of care to their patrons, however, and it was noticeable that 63% of respondents to the venue survey do not have a child protection policy and that 66% of respondents to the venue survey do not have a sexual harassment policy. Going forward, then, we ***recommend*** that venues examine and, where appropriate, re-evaluate their governance structures and policies (which could also open up funding opportunities) and 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.

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



The chart above highlights some of the other pressures currently facing live music venues. For example, 39% of all respondents to the online 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 on their events in the past 12 months. (See the interview with the Events/Venue Manager of BLOC+ in the Glasgow snapshot for an interesting example of what he perceives to be an increasingly competitive local live music environment or ecology.)

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

Even though The Sunflower – our sister pub – 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.*

Richard McCallion, *Bar Manager, The American Bar, Belfast*

Challenges for 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. It is noticeable that 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.

Furthermore, when asked to describe the most significant problems faced as a live music promoter, one third (34%) of respondents to the promoter survey mentioned venues. 44% of respondents to the promoter survey who responded to a question about the barriers that impact on putting on live music in their locale also mentioned venues. Problems and barriers included a lack of venues, cost of venues, and a lack of suitable infrastructure within the venue itself. 42% of respondents to the promoter survey who responded to an open-ended question about what the (local, national and/or UK) government could do to improve the live music scene mentioned venues, 37% mentioned funding or grants, and 16% mentioned schools or education.

Challenges for musicians

Venues or the lack thereof is also an issue for musicians. 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. Other issues for musicians are over pay. For example, 68% of all 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.

Another issue for musicians is playing for free. 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 compared to 34% that believe that it did (excluding those who selected 'not sure/don't know').

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. The data appears to suggest that musicians who perform original music are paid less than those who perform covers or composed works.

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 ... 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 ... 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!..*

Razor, *Musician, London/Brighton*

Based on all of the above, then, we ***recommend*** that local and national administrations encourage more extensive funding for emerging artists, venue infrastructure, tour support and rehearsal spaces (see the longer report for suggestions based on census responses). As it is unlikely that the public funding situation will improve in the near future, we also ***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. Furthermore, 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.

Snapshots of live music census cities

The next section of the report will focus in on the three primary snapshot cities of Glasgow, Newcastle-Gateshead and Oxford, to examine some of the ideas and themes already covered in the report at a more localised level. 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 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. The UK Live Music Census found that:

- The estimated total annual spend on live music in Glasgow is £78.8 million. This works out to an estimated equivalent GVA of £36.5 million and supports an estimated 2,450 FTE jobs;
- The median distance travelled by audiences in Glasgow on the snapshot census date was 5 miles and 23% of the audience travelled 20 miles or more (round trip, there and back again);
- As of March 2017, Glasgow had at least 241 spaces where live music is played. 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' (including university buildings and social clubs) and 8% are churches;
- 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;
- However, 36% of the 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 in the past 12 months, 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.

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. 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 ... Competition is healthy but there is a point where competition starts to affect the stability of the environment in which you're operating ... Most of the big promotion agencies now have their own small venue and there are a number of venues in the city now which 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.

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

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 O2 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 O2 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 UK Live Music Census found that:

- 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;
- 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);
- As of March 2017, Newcastle-Gateshead had at least 137 spaces where live music is played. 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;
- 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;
- However, 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.

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 ... 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 3 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?

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 ... 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.

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

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 folk to hip hop, the city's diverse population exuberantly represented in the annual Cowley Road Carnival. On the snapshot census date, 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 UK Live Music Census found that:

- 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;
- 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);
- As of March 2017, Oxford had at least 110 spaces where live music is played. 27 of these (25%) of 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;
- 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;
- However, 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.

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 O2 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.

Victoria Larkin, *Deputy Director, Oxford Contemporary Music*

Conclusions

This executive summary has given an overview of the full-length final report for the UK Live Music Census project (uklivemusiccensus.org/#report), which explores the economic, social and cultural value of live music and examines 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.

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 and PRS for Music, 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 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 policy-makers 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.

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 … As well as [the] 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.

Chelsea Rixson, *Managing Director, Brighton Music Office*

Recommendations

Based on the findings, we make the following recommendations 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. 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. 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 (see the longer report for suggestions based on census responses);
- 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:	*DIY Access Guide:* Attitude is Everything (attitudeiseverything.org.uk).
Careers advice	*Careers information pack:* UK Music (ukmusic.org).
Entrepreneurship:	*Webinars on Shared Training Activities for Music Professionals (STAMP):* European Music Council (YouTube).
Fair treatment of musicians:	*Fair Play Guide:* Musicians' Union (musiciansunion.org.uk).
Resources, advice and networking for 'grassroots' music venues:	Music Venue Alliance / Music Venue Trust (musicvenuetrust.com)
Safe spaces:	*Ten things learned at Venues Day 2017:* Webster and Behr (livemusicexchange.org).
Sustainability:	*Audience Travel Guide:* Julie's Bicycle (juliesbicycle.com) *Mapped Out: Environmental sustainability for grassroots live music promoters:* Julie's Bicycle and Generator (generator.org.uk).

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 and survey questions (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.

Notes on methodology

For a full account of the methodology including characteristics of the sample and sample sizes, see the full version of the report (uklivemusiccensus.org/#report). In brief, 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 March 2017 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;
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 event to give a 'rounded' picture about the value of live music and the current challenges facing the sector.

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. Note also that the UK Live Music Census was restricted to over-18s and to UK-based respondents only. Not all respondents answered all of the posed questions therefore percentages in this report are 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; see the endnotes in the longer report for sample sizes and explanatory notes. 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. Not all the data collected by the census has been used in this report. It is worth pointing out 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.) 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 censuses. All census data apart from profile interviewees has been anonymised.

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 categorisation of music venues. It is therefore difficult to gain a completely comprehensive picture of live music activity, and, as with previous studies, we note that a definitive census is very difficult and that we have done the best we can in terms of coverage given available time and resources. Our results are therefore conservative rather than overly optimistic.

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. 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). For notes on definitions used see the longer report.

Economic methodology

In brief, the method used to calculate the economic value of live music in the primary snapshot census cities was as follows (see the longer report for a more in-depth account). First the mean of the spend by respondents on the snapshot census date was calculated 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 have assumed zero spend.) Then the proportion of respondents in each city who spent on each category was calculated. Next the average spend in each city on each category was calculated by multiplying mean spend (>0) by the proportion spending more than zero. The average attendance in any one venue on snapshot census date in each city was then calculated by finding the average from the venue survey data. In cases where more than one survey was completed for any one venue, the hierarchy of data for establishing attendance on the snapshot census date was as follows: 1) venue online, 2) venue follow-up and 3) venue observation. The average spend at a venue on the snapshot census date was then calculated by multiplying average spend by average attendance. To generalise to the whole year for a single venue, a ratio was constructed for each period in the week (Sun-Weds, Thu, Fri, and Sat) and season (Jan/Feb/Mar, Apr/May/Jun, Jul/Aug/Sep, and Oct/Nov/Dec) from the data on seasonal behaviour in the online venue survey. These values were added together and multiplied by 13 (52 weeks divided by 4) to get a yearly multiplier. The spend at the venue on the census date was then multiplied by this yearly audience multiplier. Using data from the venue surveys, the proportion of days that venues are open (every day, 5-6 times a week, 3-4 times a week, etc.) was calculated. Taking the average of this across venues gave the ratio for a day and this was used to adjust for frequency of opening. To obtain the average annual spend at a single venue when it was hosting live music, average spend was multiplied by proportion of days open. Next this figure was multiplied by the number of spaces for live music in the city to obtain the total annual spend on live music in each city. To calculate GVA and employment figures, the method developed in the Bristol live music census and UK Music's *Wish You Were Here* reports was used. For GVA, the total spend in each city was multiplied by the Office of National Statistics' Annual Business Survey weights for each type of expenditure. For employment, the weights for each type of expenditure for each region were calculated and then the rounded values of these weights were multiplied by the total expenditure in each category for each city and then summed for estimation of FTE. All figures have been rounded for this report. 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.

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The full report is available online at
uklivemusiccensus.org/#report

For further information, please email
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