Birmingham and the (International) Business of Live Music in Times of Covid19

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Abstract: This article discusses the context of, and presents findings from, a project examining the live music sector in Birmingham, UK. This research is set against the backdrop of the broader socio-political impact of the ongoing Covid19 pandemic, and links it to national and global contexts. We explore the live music ecology of Birmingham and highlight the interdependencies between the various musical and non-musical stakeholders in the context of the pandemic—including the venues where live music takes place—examining how these stakeholders are responding to the crisis as it unfolds. In doing so, this paper asks how an urban geographical area tied into national and international mechanisms of culture, commerce and policy, can work to

sustain its musical ecology in the face of the uncertainty of a post-Covid19 era, and underlines the interconnectedness of live music ecologies and wider economies.

Key words: Live music industry, Birmingham, Covid-19, musicians, audience, gig-goers, venues, grassroots venues, mapping

Introduction

As the severity of the Covid19 pandemic was revealed during the early months of 2020, a global response was mobilised that quickly began to impact on almost every area of daily life. The urgent nature of the crisis led to a response that, in many parts of the world, brought about a sudden and unprecedented curtailment of 'normal' routines. Offices, schools and businesses were closed with immediate effect, leisure, hospitality and sporting events were cancelled. One such area experiencing this sudden shock was that of live music. With venues shuttered, revenues from music-based products and practices such as the sale of tickets and merchandise, or the income from gigs for musicians, promoters, venues and crews, came to a halt. During the various stages of lockdown and social distancing introduced here in the United Kingdom (and elsewhere) since March 2020, spaces of music production (rehearsal spaces and studios) and consumption (venues and nightclubs) have found themselves "unfit for purpose" (Taylor et al. 2020: 221). At the same time, musicians and audiences have wrestled with the task of moving from 'offline' to 'online', reconfiguring the relationship between artist and fanbase. Covid19 disrupted the spatial practice of music, removing its live, physical element and plunging the sector into a crisis mode of its own.

In this article, we reflect on the impact of Covid19 for the global live music industry by focusing on the local. This is based on the idea that it is always the immediate locality where live music is performed, and that a given localised area encompasses a plethora of actors and organisations that together make up a musical ecology. These actors include not just the musicians and audiences who perform at or attend shows, but also the live music venues, bars, recording studios, music managers, graphic designers, equipment hire companies, food and drinks suppliers, all of which create clusters of small businesses and supply chains (Wall 2004; Blömeke et al. this issue; Kuchar et al. this issue). Whilst exploring local ecologies remains important for safeguarding music making in cities and towns (Behr et al. 2016), these ecologies are also part of—and inform—the national and international picture. Exploring the ramifications for sustaining and supporting a live music industry on a local level, then, can contribute to conversations on a broader scale. As such, in this chapter we use Birmingham and its live music ecology as an explanatory case study for exploring the ramifications of, and ongoing responses to, Covid19.

Birmingham is a city of 1.1m people in the English West Midlands. Musically, it has a long, rich history of producing and consuming popular music and culture. The city was the birthplace of globally successful acts such as Black Sabbath, Duran Duran, and UB40, as well as the City of Birmingham Symphony Orchestra, and in more recent years has produced emerging artists such as Laura Mvula, Lady Leshurr, and Jaykae. The urban cultural economy of Birmingham and its surroundings has a set of specific cultural characteristics, with over 40% of the population being under the age of 25 (UKPopulation.org 2019), with a growing inflow of new residents from nearby London (Morris 2014). These factors bring jobs and 'music tourism' into the city, which is home to two of the largest venues in England: Birmingham Arena (capacity 15,800) and the NEC Genting Arena (capacity 15,600). However, Birmingham is also comparable to other Western cities in terms of its size and contribution to GDP. In European terms, its size, population and industrial structure resembles Lyon (France), Lille (France), Budapest (Hungary), Athens (Greece) and Marseille (France). When focusing on its industrialisation and what has followed, the city matches well with its sister cities Chicago and Detroit (USA), and Frankfurt am Main (Germany). By focusing on this particular urban music centre as an explanatory case study, this article narrates responses to Covid19—and explores the value of live music to wider local and national economies—in a manner that is likely to be replicable elsewhere.

We first identify the issues resulting from the application of macro-policies on a microscale (i.e. *a top-down approach*) as the UK government sought to bring the pandemic under control. In particular, this was reflected in a drop in the city's live music capacity by ~66% during the summer months of 2020 which (Rozbicka et al. 2020; Rozbicka et al. 2021), in turn, led to questions over the economic viability of live events in a more general sense as the pandemic and the response to it exposed pre-existing issues around sustainability. Next, we look into the support made available to venues during the pandemic and suggest that a narrow understanding of live music population ecology limited access to funding for a plethora of actors and organizations that are vital to the ecosystem. Exploring responses emerging from *within* the sector (i.e. *the middle ground*), we then underline the importance of various initiatives undertaken to support the industry, both in the form of organised representation in government consultations, as well as network maintenance. Finally, we report on a number of creative solutions that helped temporarily sustain the live music industry through the pandemic (i.e. *a bottom-up approach*). Here we describe various experiments with livestreaming and other online initiatives. We observe that although these were positive actions at the time, no clear business model has to date emerged around them, leading to additional questions of sustainability.

In the concluding section, we make some recommendations for policy makers, local authorities and industry bodies based on our exploratory case study. We suggest that a commitment to explicitly recognising the economic, social and cultural value of live music and live music venues is key in the formulation of recovery responses, and that this should form part of wider policy/strategy initiatives that are themselves able to account for the importance of Night Time economies. For government, policy-makers and industry organisations, we suggest that a focus on the provision of reliable, regular information is key to the sustainability and health of the sector moving forward. For venues and musicians and those who support them, we suggest that strong communication with stakeholders and related training in digital methods will be a crucial aspect of any successful emergence from the pandemic.

Methodology

This article is based on data and information collected between 2019 and 2021, during a project titled: 'UK Live Music Industry in post-2019 era: Globalised local perspective' and funded by the Creative Industries Policy and Evidence Centre (PEC), UK. The project activities included a series of panel discussions (September, October 2020 and January 2021), surveys (August-November 2020), interviews that took place throughout the duration of the project, and a city mapping.

Bringing together insights from political science research and popular music studies, we looked into why and which actors should be included in research on the live music industry in a particular locality. From an interest groups studies, we know that any policy and regulation should be perceived as a system of interest mediation (Beyers et al. 2008). From that perspective, it is not one actor steering the process, but rather exchanges between many that builds a mutual understanding that will lead to much better policy developments. From a popular music studies perspective, those exchanges are part of establishing a knowledge-driven cluster economy that is inclusive and expansive (Wall 2008). The key characteristics of the established networks are not the numbers (density), but rather their diversity. A consideration of these perspectives resulted in the deployment of a population ecology approach (Behr et al. 2016), where we engaged not only with the actors who would normally be those leading discussions, but also those who make up the environment and context around the live music industry.

The stakeholder networks we engaged with were built from representatives of: industry (venues, musicians, festival organizers, production companies, and promoters; 25%), industry associations (20%), research and education (28%), local, regional and national government (12%), consulting companies (5%), barristers (legal experts; 3%), and others (3%). The follow up interviews (18) provided a more nuanced feedback on stakeholders' contributions to the panel debates. Those were further complemented by two online surveys to gather a broader perspective on a number of issues. They were addressed to audiences (93 responses) and musicians (63 responses). The text of the surveys was based on the UK Live Music Census Surveys (Webster et al. 2018), but adjusted for location and current circumstances (i.e. Covid19).

Alongside the above, we also created an interactive map of 195 music venues in locations with a B-prefix postcode - Birmingham Live Venue Map.[1] We define music venues as "a place in which live music events take place"; a live music event in this context is one in which musicians (including DJs) provide music for audiences and dancers gathering in public places where music is the principal purpose of that gathering (cf: UK Live Music Census 2017). For a live music activity where the purpose is less clear — for example, a singer in a restaurant — we included the host venue in our list if an event was advertised on live music event pages (e.g: Songkick) and/or

[1] Birmingham Venue Music Map, https://livemusicresearch.org/blmp-map2/

if the performer was named on the social media pages of the venue (e.g. Facebook, Instagram or Twitter). Each venue was identified by name, type, address and postcode, Parliamentary constituency, and ward. The process behind the creation of the BLMP map was designed to be replicable so that it may be more easily applied to other urban areas (Hamilton 2020). This approach was intended to augment our existing methods to studying popular music, rather than replacing them. Our aim has been to provide a way of viewing the challenges and opportunities facing the live music industry from a different angle, adding not only visualisation, but also insights into the geographical spread of live music, informing urban development plans (Behr et al. 2019), identifying niche areas requiring funding, and suggesting directions for cultural policy investments. The maps explicitly link music to place, space, and community, allowing us a more informed discussion about the role of music in and for communities (Buttigieg et al. 2019).

The multiple-methods approach described above allowed us to better capture insights regarding a complex set of issues related to Covid19 and live music. We aimed to cover economic indicators, as well as, socio-cultural impact, recognising that Covid19 influenced live music involvement and had indirect impacts on people and communities that experience them. This reflects the idea that cultural markets differ from other markets and cannot be adequately explained in purely economic terms (Holt 2010; Velthuis 2005), and that more than economic values are at stake in the provision of cultural goods (Kuchar et al. this issue). In the model proposed by van der Hoeven et al. (2021) for categorising, understanding and developing live music measurement, this research approach scores high on local geographical focus and demonstrates a stronger emphasis on policy influence/support and informing potential lobbying activities.

Birmingham's Roadmap to Live Music: Tier System Revisited (Top-Down Approach)

Live music is a significant contributor to the economy of the West Midlands region, with Birmingham at its centre, bringing 'music tourism' and jobs into the city and the region. UK Music (2020) estimates that music tourism brought in 877,000 tourists,[2] spending £252 million to the West Midlands region in 2019,[3] generating 2,453 FTE jobs (Ibid). Live music venues are a central element to that and constitute an important node in a vast network of supply chains.[4] With the UK Prime Minister Boris Johnson's order of 20 March 2020 to put the UK into the first of three lockdowns, the live music experience effectively stopped. This was followed by months in various configurations of a regional tiered system allowing some live events to take place, before eventually returning to full lockdown on 30 December 2020. During the summer months, when the second, November 2020 lockdown was not yet in place, various roadmaps for reopening live music venues in England were considered by the UK government.

The closest to achieving fruition, albeit one subject to staunch criticism by the sector, was a five-step roadmap published by the government on 25 June 2020 (BBC News 2020). While Stages 1 and 2 focused on rehearsal and recording spaces, Stage 3 (initiated on 11 July 2020) started the gradual process of reopening live events to the public. Initially, venues were allowed to stage events outdoors (Stage 3), with that expectation that Stages 4 and 5 would allow gig-goers inside venues pending social distancing (2m moving gradually to 1m 'plus') and various other safety restrictions in line with Covid19 Secure guidelines (Gov.co.uk 2020a). Stage 3, in particular, changed the nature of the outdoor spaces linked to venues. Where previously these were a place to hang out (in smoking areas) between bands' performances, they were to become the main staging location.

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[2] A 19% growth from 2018, including both domestic and overseas.
[3] In comparison to £211 million in 2018. This includes direct and indirect spend.
[4] For a related starting premise see also: Blömeke et al. this issue.

Looking at data from the BLMP map and the impact of the Covid19 Guidelines around tiered easing of lockdown restrictions, moving from Stages 1-2 to Stage 3 meant that 47% of venues in the city could feasibly have put on live gigs using their outdoor spaces. Roughly half of those were in a need of changes to their licensing arrangements due to access and various noise regulations. Moreover, only some of those venues identified live music as part of their main business model (81% of venues with an outdoor space fell into this category), further decreasing the chances of them putting on the live gigs due to projected costs/benefits calculations.

Meanwhile, the city's live music scene started to prepare for the implementation of Stages 4 and 5, which would allow socially-distanced indoor shows. The eventual numbers of gig-goers venues could hope to welcome depended not only on venue capacity, but also on its floor plan. Across Birmingham, the estimated numbers varied between opening venues at 20-25% capacity (with 2m social distancing) to a potential 33% capacity with the 1m 'plus' rule. In a best-case scenario, venues were looking at the drop in their potential footfall of 66%.

At that stage, a number of further questions were raised regarding the regulations and their interpretations. For example, the 'Guidance for Performing Arts' (Gov.co.uk 2020a) applied exclusively to professionals, leaving semi-professional and amateur bands (more than 46% musicians performing in Birmingham) subject to the "Guidelines on meeting people outside their households" (Gov.co.uk 2020b), meaning the maximum size for an audience was limited to 30 people. This led venues to remove certain bands from their programme and to abandon the type of showcase events which are key to the development of new talent.

While conducting our own research, we identified that the city's live music capacity of 98,000 suddenly dropped during the summer months of 2020 by ~75% (Stages 1-3), and at best would operate at 66% capacity (Rozbicka et al. 2021). This had clear implications for ticket prices, the availability of events across the city, and indeed the economic viability of shows—with interviewees confirming that the average margin on a gig was obliterated by that sort of drop. Thus, while venues were able to open, they were not really able to operate.

Live Music in Birmingham and the Cultural Recovery Fund (top-down approach)

While Carr (this issue) and Blömeke et al. (this issue) discus the emergence of private and public support for the live music sector globally and in Germany, here we put under the microscope the UK Government Culture Recovery Fund (CRF) and look at the issues arising around its implementation on a local level. Before Stages 4 and 5 of the Tier System were implemented, the city's venues— and the hospitality sector more generally—were already dealing with a hugely difficult set of problems. It was clear that further support would be needed to sustain them through the pandemic. At stake were the future of numerous businesses, along with the creative opportunities and cultural resources that exist alongside them. Faced with this, the response from the arts sector had been at a level not previously seen, with venues, artists, funders and campaigners operating creatively—at scale and at speed—in an attempt to protect vital cultural resources. Such was the size of the crisis that it added new pressure on the sector, while also revealing long standing complications in the overall ecosystem that would have been hard to address even at the best of times. In the analysis of the Government's CRF, we identify some of the nuances of the live music ecology, and the consequent challenges that arose around the task of supporting it.

Announced by the Secretary of State for Digital, Culture, Media and Sport (DCMS) on 5 July 2020, the CRF was described by the government as the "biggest ever one-off investment in UK culture [to] provide a lifeline to vital cultural and heritage organisations across the country hit hard by the pandemic" (Gov.co.uk 2020c). The size of the package was certainly historic,[5] as was the context. 'Culture' has been defined very broadly and understandings of 'heritage' and what constitutes cultural activity played differently across the numerous sites and spaces involved (galleries, museums, heritage sites, music venues and independent cinemas). Negotiating and reconciling all of these understandings, at pace, is not a straightforward task and, arguably, one made even more difficult given the urgency of the situation and the precarious nature of the many livelihoods that depended on them.

The CRF (Grants Programme) opened for initial applications on 10 August 2020, followed by a second round on 21 August. Although the deadlines were tight – understandably and inevitably given the nature of the Covid-19 emergency – the scheme offered financial support for cultural organizations that were "financially stable before Covid19, but were at imminent risk of failure" (Arts Council England 2020). The first available tranche of funding was up to £500 million, with grants ranging from £50,000 to a maximum of £3 million, in response to need, and specifically the risk of insolvency by 31 March 2021 as a result of Covid19. The eligibility criteria specified that cultural organizations (whether for profit or not for profit) should be based in England (while other devolved regions had separate money pots), constituted as an organization, and have at least one year of certified or audited financial statements. The fund was immediately recognised as a "lifeline" for theatres, museums, orchestras and music venues, a view further confirmed during the release of the first of three separate rounds of grant awards in October 2020 (Brown 2020). The scheme received widespread public support from a range of cultural organizations (eg. Music Venue Trust, Theatres Trust), who also noted how the crisis had unlocked funding in an unprecedented fashion.

[5] It represented approximately 20% of the entire DCMS spend in 2016-17, for example.

Across the three rounds (released on 12, 17 and 24 October 2020), 48 Birmingham-based organisations received a total of £15 million.[6] The amount awarded to Birmingham-based organisations constituted 3.68% of the total funds distributed (2.05% in Round 1, 1.31% in Round 2, and 11.70% in Round 3). The funding awarded to organisations within the city limits was comparable to other cities with a similar profile. Liverpool-based organisations, for instance, received grants amounting to 2.46% of the total budget, with Manchester's organisations receiving 3.61%. All West Midlands-based organizations received 9.85% of the total funding. While that left it behind the London region (which received 33.37%), the distribution of funding appeared proportionate to other areas based on the size of geographic areas and the assumption that the larger an area and its associated population is, the higher number of cultural organisations it will play host to.

In Birmingham, as elsewhere, the funding was received by organizations that were self-categorised as 'combined arts', 'dance', 'literature', "music", 'museums', 'theatres' and 'visual arts'. Out of 48 organisations awarded funds in Birmingham, 20 were self-classified as working within the 'music' discipline. The categorisation and FAQ section of the CRF specified that any organization whose "primary role is to create, present or support one (or more)" of a provided list of genres and subgenres could apply (CRF 2020). The 'music' discipline in particular included: brass bands, choral, classical, contemporary popular, experimental, folk, jazz, world/diasporic music, and other. When matched with the BLMP's definition of live music venues (see: Methodology section) an issue arises in terms of attempting to match the CRF and BLMP data.

[6] The list of funded venues and the sums awarded are publically available on the CRF webpage: "Culture Recovery Fund: Data". https://www.artscouncil.org.uk/publication/culture-recovery-fund-data [Accessed 20 Aug 2021]. We analysed data for B-postcode. For detailed analysis, please see: Behr, A. et al. 2020.

The project definition (which seeks to maximise coverage of the ecology as a whole) does not fully match the 'music' discipline as defined in the CRF (which has a time limited remit to support specific nodes within it). In some other cases, our definition goes beyond that of the CRF, including some of the organisations marked as 'Theatre' and/or 'Combined arts'. The BLMP categorisation of a live music venue focuses on a physical space, and as such we do not include promoters' activities and music academies (unless they have performance rooms open to the public). In contrast, our database does include bars and restaurants that have occasional live music performances, with a variable included to denote whether a space uses music as part of its main business. The CRF eligibility criteria, as per the definition quoted above, disqualifies some such places, as 'music' is not their primary role/business focus (for example, pubs and bars that are predominant live music venues in the city, 44.23%, with further 7.05% as restaurants), but still applies to outdoor spaces, such as parks, where events such as music festivals may take place.

Despite the practical difficulties in reconciling the CRF and BLMP data and definitions, an analysis across the three CRF funding rounds indicates that the balance of funding in the city (more than 79% of funds) went extensively—and perhaps inevitably, given the emergency timeframe—to organisations with an existing track record of securing Arts Council England funding pre-Covid19. For example, the Birmingham Hippodrome received £125,000 in 2017 for the ASTONish Programme and was part of the successful Birmingham Dance Hub application in 2019. Birmingham Symphony and Town Hall (THSH), meanwhile, received funding for renovations in 2019 (£4.5 million), and Birmingham REP was part of a bid in 2016 that received £4.6 million. The pre-Covid19 awards to the Hippodrome, Dance Hub, THSH and Birmingham REP include awards made from Arts Council's Capital Programme and Project Grants for specific activity, representing of course only a partial picture of the total investments by Arts Council England in the music ecology of the city.

Relatedly, those in the city that received the 5 largest grants are defined in our database as theatres ("mainly theatre with some live music/opera"), arts ("arts centre, multi-arts, multi-purpose venue"), with the THSH being an exception and defined as a concert hall ("concert hall/auditorium, dedicated music venue, mainly seated gigs"; (Behr et al. 2020, as referenced in Rozbicka et al. 2021). A much smaller proportion of funding landed in the hands of places traditionally more closely linked with live music gigs more associated with popular musical forms, such as small venues ("small music venue, less than 350 capacity, dedicated music venue, mainly standing gigs", 3 venues) and medium-sized venues ("medium music venue, capacity 351-600, dedicated music venue, mainly standing gigs"; 1 venue; (Behr et al. 2020, as referenced in Rozbicka et al. 2021). As Arts Council England West Midlands Office (one of the Arms' Length Bodies responsible for the CRF distribution) stated, most requests from music venues and live events organisations were for less than £250.000.[7]

If we focus only on the CRF, there is an apparent disparity between the amounts granted to organizations which are dedicated to music as their main business and those with a broader focus. Across 48 organisations that received the CRF award in Birmingham (28 in the first round, 16 in the second, and 4 in the third round), only few are venues or organisations which have a dedicated and primary focus on live music. Out of 195 live music venues active on the scene in the Birmingham B-postcode before the 2020 Covid19 lockdowns (or 158 as specified to CRF

[7] E-mail communication with Arts Council England (West Midlands Office), 8th December 2020.

mapping), only an estimated 10% have received funding in the scheme (6% in Round 1, 2.5% in Round 2, and 1.9% in Round 3).

The CRF grants are a welcome indication of both the will and—albeit under extraordinary circumstances—capacity to expand support for live music activity and culture at large. We can, though, also observe how this process has revealed the extent to which many of those venues that make up the ecology of live music in the city sit uneasily beyond—or at least at the edges of—the parameters of such schemes. There is, then, clearly work to be done by a variety of stakeholders, including researchers, in terms of making visible the types of live music activity that—to date—falls outside of those parameters. While crisis conditions militate towards a necessarily tactical approach, the government response over the longer term will need to start taking account of strategic considerations, including the role of those spaces and participants diffused throughout the musical ecology.

Development and Engagement of Stakeholders (Middle Ground)

The Covid19 pandemic created a sense of equality in terms of challenges ahead and opened the door to new forms of unity in what is an otherwise competitive space. Our research identified the emergence of new support networks. Moreover, there were visible efforts to create a spirit of solidarity amongst venues, musicians and their audiences. The spring and summer months of 2020 saw a great deal of lobbying and campaigning activity around requesting support for the arts generally and live music in particular. Examples here include online and social media campaigns around hashtags such as #SaveTheArts, #LetTheMusicPlay, #RedAlert, #WeMakeEvents, #MakeMusicWork, and #SaveOurVenues. Those were widely supported by users on social networks who shared posts with these hashtags, and further demonstrated by the establishment of online groups that aimed to show solidarity with industry workers stuck at home, such as Musicians Support and UK Amateur Touring Crew, and Musicians Support. These organic networks of support were supplemented by more strategic work from independent charitable organizations. For example, ‘Help Musicians’ created a Corona Musicians information webpage, providing resources, advice and a hardship fund.

A number of major bodies and industry organisations engaged in dialogue and lobbying to help shape the government response to Covid19. Organisations such as the Arts Council, Musicians Union, Music Venue Trust (MVT), Night Time Industry Association (NTIA), UK Music, NEXSTART were particularly vocal and visible during this time. Some of these collaborations resulted in positive outcomes. It is worth noting, for instance, the 89% success rate in CRF funding for those venues who made use of MVT guidance when building their applications (MusicWeek 2020). The NTIA campaigned heavily and liaised with DCMS with the aim of raising awareness of the plight of the night-time economy and call for the inclusion of live and dance music in debates around potential support.[8] At a more local level, a number of initiatives by the West Midlands Culture Response Unit (CRU) mobilised the creative sector within the West Midlands and established itself as a contact point and trusted information source for affected organizations. Other initiatives, and in particular those undertaken by CRU, aimed at building a more equitable and inclusive sector.[9] (Interview, 20 September 2020).

The examples above clearly demonstrate the value of communication and collective activity across networks. Despite limited resources, the organisations above nevertheless found the capacity to act as a focal point, and to channel expertise to demonstrable effect. The worth of such

[8] Rozbicka in conversation with – anonimised – Interviewee 1, 20 Sep 2020.
[9] Rozbicka in conversation with – anonimised – Interviewee 2, 20 Sep 2020.

organisations to grassroots practitioners was clearly demonstrated during this period, evidenced by the manner in which they managed to sustain membership during a period when many members were not working or earning. See, for example, the Musicians' Union membership of 32,000, which remained stable during the pandemic.[10]

Creative Live Music Responses (Bottom-Up Approach)

In face of the numerous lockdowns and on-going restrictions for live music experiences, the live music industry had to adapt very quickly. One key area of activity that emerged during the research period was a concerted move towards online live music streaming. This not only provided a potential revenue stream, but also new forms of engagement and the opportunity to consolidate network approaches to recovery and sustainability.

At grassroots levels, too, artists started bringing fans together via online platforms. In the earlier stages of the pandemic, fans were invited to the homes of artists, or to empty venues, to experience their favourite songs and artists in new settings. Internatonal examples include: Maries Crisis NY, the Piano Bar providing daily sing-alongs of show tunes, or the online dancefloors of DJs, such as Diplo's 'Corona World Tour'. As the year wore on and it became clear that the summer festival season was also cancelled, some festivals moved online. Must Music Productions created the Festival YoMeQuedoEnCasa and attracted 60,000 viewers in its first hour. In Norway, Verfet Online Music Festival featured the country's top artists and attracted sponsored from the country's national bank, Sparebanken. In Birmingham itself, the Swingamajig festival organisation hosted an online quarantine 'Lockdown' Party to replace its festival in May. Classical

[10] Rozbicka in conversation with -anonmised- Interviewee 4, 20 Oct 2020.

music organizations too stepped up and shared their concert archives online (eg. Berlin Philharmonic's 'Digital Concert Hall', Budapest Festival Orchestra's 'Quarantine Stories'). The willingness to innovate and experiment with new means of engagement led some to speculate on whether online live music streaming represented a seismic shift.

The response to Covid19 also brought examples of direct-to-fan engagement by individual artists, bands and venues, with physical, in-place interaction replaced by the live streaming on Instagram. Examples here include Chris Martin from Coldplay, P!nk, and Tim Burgess from the Charlatans. But, this extended to local acts and venues. The Night Owl (B9 4AG) offered livestream DJ sessions, Pirate Studios (B9 4EG) gave over its Instagram channel to producer Nutty P, who provided tutorials on production. These particular approaches placing the streamer in the centre of activity, and has been referred to as a 'Third-wave' of live streaming (Lottridge et al. 2017). Online engagement spread further still, with artists establishing an 'access-all-areas' style online presence through online meet and greet pages such as Looped and Chatalyze, with some charging a fee (CBC 2020).

Venues, too, moved online. Some updated their benefactors through online posts on Facebook and Instagram, including messages from staff encouraging their followers to 'stay safe', 'be kind', as they kindled hopes for a reopening in near future. During the initial stages of lockdown, some of the city's venues also offered the offline delivery of various products (for example: DigBrew.Co, B5 5SA), or else engaged in crowdfunding campaigns and the sale of venue-branded merchandise (eg. Hare and Hounds, B14 7JZ). However, issues of revenue and sustainability remained. A lot of the online initiatives described above were delivered for free, and it remains unclear how artists, bands and venues will benefit in the longer term from the emergence of online live streaming models (Bibolito Workshop October 2020; Flynn and Anderson this issue).

The uncertainty around live music sustainability is further deepened by a variability in audience confidence about returning to venues. Over 80% of gig-goers purchased tickets for events that were later cancelled because of Covid19, and although 64% of that group kept the ticket for the rescheduled event, 15% sought refunds and 4% kept the ticket, but did not intend to attend the rescheduled event (Rozbicka et al. 2021). These responses to the survey at the peak of summer 2020 suggested an increased cautiousness about attending events in the future, with questions about a realistic approach to maintaining health and safety and the relative benefits of social-distanced concerts.

Concluding Remarks

From balcony-based sing-alongs in Italy, to megastar global broadcasts, music has become embedded in our response to disrupted lives (Behr 2020). As the pandemic unfolded, music continued to adapt. Many stakeholders have accepted that the current situation has long-term, transformative implications. The immediate impact of Covid19 was the loss of an income for live events in 2020 (for identical conclusion see: Sánchez-Fuarros this issue), but it seems clear that long term responses need a broader focus to support the live music ecology. As the sections and data above demonstrates, the UK live music industry has faced a number of critical challenges that must be addressed to preserve it, in Birmingham as elsewhere. With that in mind, what follows below is a series of recommendations that pertain specifically to our Birmingham case-study, but with broader relevance that we suggest have potential applications in other, comparable cities.

A vital aspect of any city's live music ecology are its grassroots music venues and those places from the fringe of live music activity, like pubs, bars and restaurants. We therefore recommend that local authorities recognise explicitly within their recovery policies the economic, social and cultural value of live music and live music venues to their regions; that any proposed initiatives take account of the actual and potential contribution of live music to the recovery process. One way of doing this would be an across-policy approach, further enhanced by implementation of a live music industry impact assessment. The impact assessment should implement an understanding of a given live music ecosystem as part of a broader night time economy (including the vast network of venues; supply chains and gig-goers spend around the venues that have been vastly affected by the pandemic lockdown), leading to the development of the Night Time Industry Impact Assessment that would be applicable to any new policies/strategies and planning decisions taken at local and regional level.

There is also an evident need for educating policy-makers and regulators on the realities of the live music ecology. While the Covid19 crisis conditions militate towards a necessarily tactical approach, the government response over the longer term will need to start taking account of strategic considerations, including the role of live event spaces and participants diffused throughout the musical ecology. Consequently, there is a need for the creation of robust and sustainable information hubs to support local venues of all kinds, and audiences, on the road to the recovery. A good example here could be initiatives undertaken by the Liverpool City Region, including the Music Fund, in support of the Liverpool City Region Music Board (an independent, sector lead board), and the Greater Manchester Music Commission. This could serve as a forum for intra-sectoral communication across the different musical stakeholders (e.g. promoters, venues, musicians) and—informed by the work of national organisations such as the Musicians' Union and Music Venue Trust—a channel of communication between the collective voice of sector and local authority.

Nevertheless, venues themselves need not remain dormant. While planning their return to regular activities in the post-pandemic period, they can start building awareness campaigns about their social distancing and health and safety solutions. While relatively low cost, this will be a vital step towards building audience confidence encouraging patrons to return when it is safe to do so. Taking the previously identified reliance of gig-goers on modern technologies, the advice is to use social media to conduct those campaigns. There are resources at hand from representative bodies to facilitate this, which venues can tailor to their own offer and, crucially, their own clientele.

In the longer term, live-streaming—by musicians themselves, and by venues and promoters—and other practices that have come to the fore as a result of the pandemic look likely to become increasingly embedded in industry practice. Here, there is both a need and an opportunity for institutions of further and higher education to respond to the shift. Training in the relevant digital technologies, for creative practitioners and associated businesses, will be an important aspect of responding not just to new tools and practices but new strategies and modes of practice.

As we conclude this article, the pandemic rolls on. Despite the implementation of a successful vaccination programme in the United Kingdom during the first half of 2021, it remains unclear the extent to which live music (or—indeed—many other areas of everyday life) will 'return to normal' in 2021. The pandemic brought about a sudden curtailment of live music activity which —coupled with the various levels of response and recovery—exposed numerous issues with existing practices and models. As our research continues, we will monitor closely whether opportunities to rethink or reorganise existing practices accordingly to the lessons of the pandemic are implemented into 2022 and beyond.

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[11] See https://www.nesta.org.uk/project/creative-industries-policy-and-evidence-centre/

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