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The UK Live Music Industry in a post-2019 era: A Globalised Local Perspective

Birmingham Live Music Project

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About this report

This report is the second in a series produced through an on-going, collaborative programme of research being undertaken by a team at Aston University, Birmingham City University and Newcastle University. The Birmingham Live Music Project (BLMP) seeks to explore how the live music ecology of Birmingham and beyond is constituted, and how the sector is approaching challenges related to local, national and international change. Specifically, it explores how those challenges are being managed at a local level, and whether any coping strategies identified within the Birmingham live music sector could be applied to other urban areas. This report is based on activities conducted within a project titled 'The UK Live Music Industry in post 2019 era: A Globalised Local Perspective' made possible by a grant from the Creative Industries Policy and Evidence Centre (PEC), which is led by Nesta and funded by the Arts and Humanities Research Council. The research took place between February 2020 and April 2021.

Key Words

Live music industry; Birmingham; Brexit; Covid-19; musicians; audience; gig-goers; venues; grassroot venues; mapping; live music ecology.

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About the Creative Industries Policy and Evidence Centre

The Creative Industries Policy and Evidence Centre (PEC) works to support the growth of the UK's Creative Industries through the production of independent and authoritative evidence and policy advice.

Led by Nesta and funded by the Arts and Humanities Research Council as part of the UK Government's Industrial Strategy, the Centre is a consortium of universities from across the UK (Birmingham; Cardiff; Edinburgh; Glasgow; Work Foundation at Lancaster University; LSE; Manchester; Newcastle; Sussex; Ulster). The PEC works with a diverse range of industry partners including the Creative Industries Federation.

For more details visit http://www.pec.ac.uk and @CreativePEC

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Executive Summary

Welcome to this report, the second produced by the Birmingham Live Music Project team.

Within the pages that follow, we present the results of our research exploring the live music ecology of Birmingham, and how the live music sector in the city is approaching challenges related to local, national and international changes. Specifically, we look at how those challenges are being managed at a local level and what lessons can we learn from them at the national level.

In the following sections, we discuss the methodological design behind our research. From there, we present the results of our work, organised into four sections on: ***Birmingham and its live music ecology; the sociocultural and economic changes affecting it; the impact of international, national and local regulatory regimes; Covid-19 and the live music ecology.***

Key Findings

- ***Birmingham's live music ecology*** is extensive and varied. ***195 music venues*** were revealed by the research, across ***8 broad venue types***, with a total ***estimated capacity of 98,000***. Although we make no claims that this figure is exhaustive, it nevertheless represents the most comprehensive mapping exercise of music venues in the city to date, and as such provides the best available snapshot of Birmingham's live music ecology.
- Birmingham's live music ecology is ***predominantly built from pubs, bars and small venues (49%)***, which is similar to the landscape of Liverpool (44%).[1] The percentage of music and arts venues in the city (25%) matches that of Oxford, and to a lesser degree Glasgow and Newcastle.
- Birmingham has a ***significant number of unorthodox venues***, such as social clubs, restaurants, churches and outdoor spaces. Although this in part may be explained by the bespoke classifications within our mapping, it nevertheless hints at the potential for different types of live music activity to be nurtured and eventually enfolded within conversations about live music activity in the city.
- Despite anecdotal evidence to the contrary, ***the north of the city has a lot of music venues.*** However, these are generally not plugged into local/national circuits of promotion in the ways that venues in the city centre and certain southern suburbs are. In terms of longer-term opportunities around training, development and sustainability, the north nevertheless has a solid base to start from.
- Within the ecology, ***small venues*** are widespread across all areas of the city and are particularly embedded within local communities. However, the events of 2020 and 2021 – and particularly those related to Covid-19 and Brexit – highlight the ***need for these venues to be protected, sustained and supported***. These types of venues are also key to stakeholders within the ecology. Musicians considered pubs and bars as their main option for income generation, and gig-goers – when asked what would encourage them to see more live music – overwhelmingly indicated that more live music in pubs and bars would be key.
- Our analysis in the report demonstrates the ***centrality of digital systems in live music discourse and business activity*** and suggests that more attention should be paid to training and issues of data literacy for existing stakeholders (and those in the pipeline), so that the sector can make the most of the opportunities (and mitigate against problems) presented through these emerging channels. However, although online channels for promotion and sales represent the largest share of activity and should form a key element of training and other activities (for example, those related to sustainability), they do not represent the full picture, and attention to (hyper)local communities and how they may be reached is fundamental, as it may hold the balance between the success or otherwise of a live music venue.
- Stakeholders operating commercially within the ecology have ***significant concerns over Brexit*** related to the additional costs and administrative requirements it will bring, alongside concerns over a decline in consumer confidence and a perceived threat to the cultural reputation of the UK. In general, ***the lack of reliable information and a central agency advocating for the city*** to which they could turn for support was highlighted. This was echoed in how the sector experienced the UK Government's response around Covid-19, which left many stakeholders feeling under-supported. With other regulatory issues (Birmingham's Clean Air Zone, for example), easily accessible local information and support will be key.

Recommendations

The music industry is the UK's "calling card" (Tom Kiehl, UK Music, interview 20 Oct 2020). As this report demonstrates, it is facing a number of critical challenges that must be addressed to preserve it.

This is partly a matter of dealing with longstanding debates at national and global levels related to industrial structures formed in the middle of the last century or before, and heavily disrupted by the digitisation and datafication of recent decades – as the evidence to the DCMS Committee Inquiry on the Economics of Music Streaming demonstrates.[2] Other challenges that bear directly upon live music are subject to the still intensely debated, and highly fluid, responses to the disruptions wrought by Brexit. The effects of this, like those of the national and international progress against Covid-19, are inescapable for musical practitioners and businesses in Birmingham, as they are elsewhere. This does not, though, mean that local authorities, local musicians, businesses, and their representative organisations have no options for action that could help to improve their situation. With that in mind, there follow a series of recommendations that pertain specifically to our Birmingham case-study, but with broader relevance.

RECOMMENDATION (i): We recommend that local authorities recognise pubs and bars, along with grassroots music venues, as a crucial network and as potential sites of artist and audience development, not only as community building assets but also cultural ones. This means the inclusion of these venues in the cultural policies of the city and hosting of live music events being defined as a factor enhancing chances of license application.

RECOMMENDATION (ii): We recommend that local authorities recognise the economic, social and cultural value of live music and live music venues, including grassroots venues, to the region; that planning, liquor licensing, environmental, health, culture and city regeneration strategies take account of the actual and potential contribution of live music. One way of doing this would be an across-policy approach, further enhanced by implementation of the Night-time Industry Impact Assessment coordinated by a Music Office and/or Night Major for the region.

RECOMMENDATION (iii): We recommend that greater attention is paid to a balanced population of venues across the city. In particular, the establishment of venues in the north of the city that may complement some of the more lauded venues of the city centre and southern suburbs would strengthen the musical offering of the city considerably.

RECOMMENDATION (iv): For researchers looking into the study of live music, we recommend a mixed method approach. The combination of methods, informed by the principles of the co-production of knowledge – and mindful of an 'ecological' approach to live music measurement – helps to produce inclusive datasets and a more detailed picture of the live music sector than qualitative or quantitative approaches alone.

RECOMMENDATION (v): Figures demonstrate the centrality of digital systems in live music discourse and business activity, and suggest that attention be paid to training and issues of data literacy for existing stakeholders (and those in the pipeline) so that the sector can make the most of the opportunities (and mitigate against the issues) presented through these emerging channels.

RECOMMENDATION (vi): A healthy live music ecology in any city will require promoters to keep abreast of changes in the technological landscape over the coming years so that they can harness online systems in the best way possible. However, offline still has a role. Attention should be paid, then, to the manner in which a rounded, on- and off-line communications strategy for promoters and venues can enable sustainability.

RECOMMENDATION (vii): For researchers looking into the study of live music, we recommend that, as much as possible, efforts need to be made to reach wider populations in data gathering exercises. Our survey sample represents a particular, self-identifying group of active gig-goers, but it does not reflect the profile of the city population as a whole (especially when looking into under-representation in the sample of BAME residents). It is therefore important that a more fully encompassing measurement process would help to better define the ecology.

RECOMMENDATION (viii): We recommend a formalisation of impact assessment processes relevant to the live music industry at local and regional levels. Encompassing here an understanding of the live music ecosystem as a part of the broader night-time economy (including a vast network of venues' supply chains and gig-goers' spend around the venues), we encourage the development and implementation of a Night Time Industry Impact Assessment that would be applicable to any new policies/strategies and planning decisions taken at the local and regional level.

RECOMMENDATION (ix): The development of materials building on existing resources that can assist policy-makers and regulators in their understanding of the realities of live music ecologies.

RECOMMENDATION (x): We recommend that local authorities create information hubs to support local venues

and audiences on the road to the post-Covid recovery. A good example here could be initiatives undertaken by the Liverpool City Region, including the Music Fund, which support the activities of the Liverpool City Region Music Board (an independent, sector-led board), as well as help with submission of applications to the support funds and other future funding initiatives.

RECOMMENDATION (xi): We recommend that venues, while implementing their return to regular activities, build on existing awareness campaigns about social distancing and other health and safety solutions. While relatively low cost, this will help to build audience confidence and will make more patrons willing to return to the venues. Taking into account the reliance of gig-goers on digital technologies (see section: Socio-cultural changes), the advice is to use social media to conduct those campaigns.

The research narrated in this report represents a continuation of the work already undertaken around the role and value of live music. We are indebted to the ongoing efforts of stakeholders, industry groups, and researchers who are collectively attempting to make the case for live music, and through their work demonstrate its vital economic and cultural role and aim to help the sector rise to the challenges and opportunities that emerge.

For the BLMP team, this report represents the end of the first phase of our contribution to that collective effort, one we hope to build upon in our future work. In the meantime, we hope you will find this report useful, insightful and beneficial.

BLMP Team,
Dr Patrycja Rozbicka | Dr Adam Behr | Dr Craig Hamilton
December, 2021

1. Flynn, M., Vázquez de Lara Padilla, L., & Kasikov, E. (2018). *Liverpool Live Music Census - Analysis of Data: Liverpool Live Music Census - Analysis of Data*. Liverpool: University of Liverpool/Liverpool John Moores University/LIPA. Available at: https://www.liverpool.ac.uk/media/livacuk/schoolofthearts/documents/music/Liverpool,Live,Music,Census,-,Analysis,of,Data.pdf [Accessed: 1 November 2021]

2. Digital, Culture, Media and Sport Committee (2021) Economics of music Streaming: Second Report of Session 2021–22. London: House of Commons. Available at: https://committees.parliament.uk/publications/6739/documents/72525/default/ [Accessed: 23 November 2021]

Introduction.
The UK Live Music Industry in a post-2019 era:

A Globalised Local Perspective

This report maps the socio-cultural and economic challenges faced in the post-2019 era by the UK's live music industry, valued at over £1.3 billion in 2019.[3] Alongside the economic impact, it investigates the mechanics of culture and the social costs of changes in an industry that is significant for concepts of culture, creativity and identity more broadly. It considers the challenges that stakeholders in the sector face in creating and maintaining coping mechanisms for live music culture, and asks how they may respond to barriers and opportunities created by an evolving global and UK landscape, including but not limited to issues related to Brexit and Covid-19.

We focus specifically on Birmingham and its music industries. By concentrating on this urban music centre as a case study, this report measures the value of live music to the economy in a manner that is likely to be replicable elsewhere. Indeed, such replicability has been key to the design of the research methodology behind this report. Birmingham is a vibrant city with a long, rich popular music history and culture. It has produced world-famous artists, including Black Sabbath, Duran Duran and UB40, as well as the City of Birmingham Symphony Orchestra. The city's musical history, venue capacity, contribution to national and international music industries, geographic location, urban footprint, and population size, are comparable - and in some cases exceed - those of other UK cities. Over 40% of the population is under the age of 25,[4] and the city has a growing influx of new residents from London.[5] It is also the location of a host of upcoming, planned developments, including the Commonwealth Games in 2022. These factors together bring jobs and 'music tourism' into a city which is home to two of the largest venues in England: Utilita Arena Birmingham (capacity 15,800), and the Resorts World Arena (capacity 15,600) as well as a wide array of smaller and mid-sized venues.

The focus on the local in our research is based on the idea that the immediate locality is where music is created, performed and experienced in a particularly salient manner. It is where emerging artists hone their craft, where established acts play a night of a national tour, and it is where music acts as the 'soundtrack' to a good night out. Birmingham is not only a regional music economy, but a corner of a global one.[6] Alongside the bars, clubs and live music venues, there are recording studios, music managers, promoters and agents, graphic designers, equipment hire companies, sound engineers, and other technical staff, all of which create clusters of small businesses and supply chains that can be identified as music 'ecologies' and classified as part of the 'Cultural Industries'. Importantly, these localised musical activities are tied to regional, national and international systems of policymaking. Whilst researching specific localities remains important for safeguarding music-making in cities and towns, it can also inform the national picture. By exploring how to sustain and support a live music industry on a local level, we aim also to contribute to conversations on a broader scale.

The music industries are a globalised set of businesses with their own rules, operating in a state of flux, with an evolving interplay of tastes, styles, and genres that influence the overall dynamic of the sector. Brexit and Covid-19 are additional and critical factors, especially from the UK perspective. The impact of digital technologies also means that the local is linked to the global. The competition for audience attention on a global scale is replicated and linked to activities within local live music industries. Stakeholders, such as musicians, venue owners, instrument makers, equipment producers, and bar staff - all operating in localised areas - are connected economically to a wider, global sector, and affected by the legislative environments which national and local policy-makers create for live music. In the 21st Century, too, live music revenues have become increasingly central to the overall musical economy.[7] Local creative industries need to consider sustainable, long-term solutions to these trends, whilst coping with the short-term shocks placed upon them by factors such as Brexit and Covid-19.

Through the work detailed in this report, we aim to contribute to the growing body of research that has explored ways of capturing the cultural and economic value of live music. By producing the first detailed survey of the

Birmingham live music sector, our research has attempted to make visible the extent of the activity taking place within it, and has sought to establish useful connections between organisations and stakeholders that may lead to better collaborative practice. Accordingly, this report 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'. This received funding from the Creative Industries Policy and Evidence Centre (PEC), which is led by Nesta and funded by the Arts and Humanities Research Council. The project activities included a series of panel discussions, surveys and interviews, city mapping activities, and consultation sessions that took place throughout the work.

The main goal of these activities was to address the following research questions:

- What are the economic and socio-cultural effects of global music industry shifts post-2019 on live music, from a localised perspective?
- What are the challenges to creating and maintaining coping mechanisms for live music culture?
- What are the barriers and opportunities emerging from the evolving global and UK environment and what have been the responses to them?
- How can the above help sustain a thriving live music ecology?

We hoped not only to drive discussion, but also to provide a starting point for unpacking the large number of entangled concerns where international, national and local matters intersected. In the early stages of our work our response to the questions above was developed to account for the emergence of the Covid-19 pandemic during the project. We reflected on which concerns could be addressed given the relative capacity of local stakeholders to tackle them.

In this report, we provide a snapshot of the many and varied concerns and responses that exist within the local music 'ecology' of Birmingham – a conceptual framework, discussed further in our methodology section, that seeks to capture both the social and material interrelationships operating around live music (musical and non-musical actors). Hence we also consider the broader contextual actors and factors which have a bearing upon musical activity itself. We have mapped specific areas of concern and proposed a number of recommendations relevant to various stakeholders at local and regional levels. These may be of interest not only to those directly involved with the live music activity (musicians, promoters, etc.), but also to policymakers, council officers, funders, and beyond.

Following a discussion of the **methodology** we developed and deployed during our research, the report proceeds in four sections. We start with an exploration of ***Birmingham and its live music ecology*** and include a historical and contextual overview of the city for readers not familiar with Birmingham. By producing the first detailed survey of the Birmingham live music sector, our research attempts to make visible the extent of activity taking place therein and seeks to establish useful connections between organisations and stakeholders to point towards the potential for better collaborative practice. Our approach includes a broad definition of venues (from large arenas, to local bars and pubs), where the interrelation of different categories of venue helps to shape elements of the ecology as a whole.[8]

Our exploration of the ***socio-cultural and economic changes*** currently taking place in the city's music industries ecology shows that while live music events take place in the offline world, the digital environment is now key. This is not only reflected in how fans consume music, but also in how live events are promoted and ticketed. We demonstrate, however, that although digital is hugely important, there are numerous reasons why we need to consider also the local/hyperlocal and offline routes to engaging with communities. We then move on to look at the impact of ***international, national and local regulatory changes***. Foremost here are the implications of Brexit following the UK's decision to leave the European Union. We outline here localised concerns over issues with visas, 'red tape' and additional costs for musicians, support crews, and venues that were detailed in our previous report.[9] The evidence gathered in

this report further underlines the importance of EU touring as an income generator, underpinned by the enrichment of the cultural and creative experiences that this activity brings. We show that the most problematic areas appear to centre around a perceived lack of reliable information, or a single source from which to gain knowledge about the implications of Brexit for the live music industry, which compounds an underlying uncertainty about the future. We then move to a discussion of local regulatory change. By looking at localised case studies of Birmingham's building regulations, the introduction of a Clean Air Zone, and the 2022 Commonwealth Games, we point to wider implications for the live music industry elsewhere. We demonstrate how local regulations often include hidden costs for venues and musicians. The legal language of the regulations is often too complicated, leading to limited access to exceptions and also potentially missed opportunities. This – too – suggests that better information and guidance is needed.

In our final section, we explore the ***impact of Covid-19 on the live music ecology***. We examine a drop in the city's live music capacity by ~60% during the summer months of 2020 following the implementation of various measures imposed by the UK Government, and how these combined with existing concerns over the economic viability of live events. We look also into the support available to venues during the pandemic and indicate that a narrow understanding of localised live music ecologies limited access to funding for a plethora of actors and organisations. Finally, we show also that experiments with livestreaming and other online initiatives had positive potential, but because no clear economic model emerged surrounding them, questions of sustainability remain. Through this, we argue that training in digital technologies is needed to harness similar challenges and opportunities in the future.

3. UK Music (2020) *Music by Numbers 2020*. Available at: https://www.ukmusic.org/wp-content/uploads/2020/11/Music-by-Numbers-2020.pdf [Accessed: 8 December 2020]

4. UKPopulation.org (2021) *Birmingham Population 2021*. Available at: https://www.ukpopulation.org/birmingham-population/ [Accessed: 8 November 2021]

5. Morris, S. (2014) 'Brum on over: The London exodus to UK's second city', *The Guardian* 22 December. Available at: https://www.theguardian.com/uk-news/2014/dec/22/birmingham-boom-londoners-move-in [Accessed 8 December 2020]

6. Wall, T. (2008) 'Making money out of music: the role of music and radio in regional economic development'. *BOX papers*, 1:07, pp. 4-5.

7. UK Revenues from live music, for instance, overtook those from recording in 2008 and, notwithstanding growth in recording revenues due to streaming, live music remains key to musical livelihoods.

Page, W., & Carey, C. (2009). *Adding up the music industry for 2008*. Available at: https://www.prsformusic.com/-/media/files/prs-for-music/research/economic-insight-15-adding-up-the-music-industry-for-2008.ashx [Accessed: 26 October 2021]

8. Behr, A., Brennan, M., Cloonan, M., Frith, S. and Webster, E. (2016) ' Live Concert Performance: An Ecological Approach', *Rock Music Studies,* 3:1, 5-23.

9. Rozbicka, P., Hamilton, C., Behr, A., Correa Vila P., Davies, L.J. (2019) Birmingham Live Music and Brexit. Aston University; Birmingham City University; Newcastle University.

Methodology

This report is based on a mixed methods approach, comprising workshops and panel discussions, participatory observation in various consultation sessions, interviews, city mapping, web-scraping, and online surveys. These methods, led by the principles of the co-production of knowledge and an ecological approach to live music measurement, combined to produce data from various sources and from different key stakeholders in the live music industry of Birmingham, with the aim of providing a detailed picture of the current challenges facing the sector.

The concept of a live music ecology was developed by by Frith et al (2013). [10] The analogy of an 'ecology' is an attempt to get at getting at the material and social conditions in which live music is produced. It is a way of understanding musical performance as something that is enabled by a network of people and organizations.[11] The notion of a live music ecology draws attention to the physical and infrastructural context of cultural space. Crucially, the concept also includes agents and other stakeholders who are not necessarily musical in their outlook or actions. Here, we can understand the extent to which the actions of venue owners, managers, promoters, agents, and musicians are influenced by local and national policy-makers. Ultimately, musical performances are delivered for audiences, which also play a role in generating the value in the live music industry.[12] The key is understanding that agents, organisations, and other stakeholders are part of an interdependent network - an ecology with a diversity of venues and encompassing a varied list of stakeholders and music styles, which together provide not only a pathway for musical careers and experiences, but also a cultural system for the city and region. For a city to have a healthy live music ecology, there need to be operable, varied venues of different sizes that provide progression routes for local musicians, bring a decent mix of touring musicians into the city, and help enhance the cultural experiences of audiences.

In the sections that follow, we discuss each of the different methods used during the course of the project, and how they were combined across the course of our research to gain an understanding of Birmingham's live music ecology, and the role of policy, regulation and external factors upon it.

Workshops and Panel Discussions

Bringing together insights from political science research and popular music studies, we first looked into which actors could be included in research on a live music industry in a particular locality. From an interest groups studies or policy-making perspective, we know that any policy and regulation should be perceived as a system of interest mediation.[13] From that perspective, no one actor steers the process. Rather, exchanges occur between many actors to build a mutual understanding that leads to better policy developments. From a perspective more focused on the music industries, those exchanges can be part of establishing a knowledge-driven cluster economy that is inclusive and expansive.[14] The key characteristics of the established networks are not the numbers (density), but rather their diversity. A consideration of these varied perspectives resulted in the deployment of a broadly ecological approach, 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. In practical terms, this meant that engaging with live music audiences and grassroots musicians was important, alongside engaging with established promoters or local council officials.

We first engaged with our various stakeholders through workshops and panel discussions. Originally planned as face-to-face events, these were ultimately moved online due to Covid-19. On 18th September 2020, we organized a panel entitled 'West Midlands and the (international) business of Creative Culture',[16] co-hosted by the Creative Culture West Midlands Response Unit (CRU). This event included speakers from CRU and the Night Time Industries Association. This was followed by an event on 20th October 2020, 'UK Live Music Industry in post-2019 era. Discussing the implications of Brexit and the ongoing Covid-19 pandemic on the UK's live music industry',[17] hosted by the Foreign Policy Centre, where panellists included representatives from the Musicians' Union, Music Venue Trust, UK Music, and the cross-party Digital, Culture, Media and Sports (DCMS) Select Committee. A final workshop took place on 13th January 2021 and focused on the approaching 2022 Commonwealth Games and the impact of Brexit and Covid-19 on Birmingham.[18] Panellists here included representatives of Birmingham City Council's Cultural Development Unit and the Commonwealth Games Cultural Programme. These events were open to the public and included time for questions from the 'digital floor'. The number of registered participants for these events varied between 40 and 80.

We also participated as observers in a number of stakeholders' consultations organised by various organisations, each of which focussed on the emergence of Covid-19 and its related threats to the live music industry.

Those events included:

- NEXSTART (a coalition of experts from the licensed hospitality and entertainment industries; Group D, 5th and 11th May 2020, 15th June 2020)
- Creative Culture West Midlands Response Unit (Regional Artistic Directors, 11th May 2020, 2nd June 2020)
- Recovery Strategy Meeting, 12th May 2020, 1st June

2020, 6th and 25th August, 8th September, 17th November 2020)
- West Midlands Music Recovery Roundtable (25th November 2020 and 18th December 2020).

Insights from the events detailed above are summarised in this report and further supported by interviews with individual stakeholders.

Stakeholder Interviews

A total of 18 interviews took place, between March and May, and in October 2020, allowing for more nuanced feedback on contributions from panel discussions. The stakeholder networks we engaged with were comprised of representatives from: 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%; Figure 1).

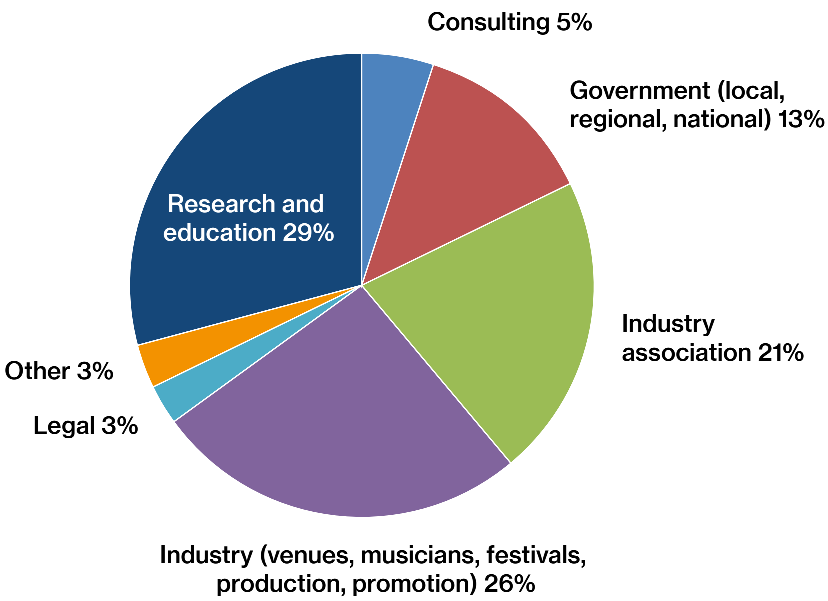
City mapping

Alongside the panel discussions, workshops and interviews described in the previous sections, we also created an interactive map of music venues in locations with a B-prefix postcode (Figure 2).[19] For the purpose of this mapping exercise, we defined music venues as 'a place in which live music events take place', a live music event in this context being 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.[20] For a live music activity where the purpose was less clear — for example, a singer in a restaurant — we included the host venue in our list if an event was advertised on commercial live music event pages (e.g: Songkick)[21] and/or if the performer was named on the social media pages of the host venue (e.g. Facebook pages, Instagram or Twitter posts). Each venue was identified by name, type, address and postcode, Parliamentary constituency, and ward.

An initial phase of web-scraping (Jan-Feb 2020) gathered information on Birmingham music venues from the Songkick database.[22] This produced a partial list of venues and venue information, including venue names, addresses and postcodes. The data gathered in this phase was then verified and augmented by a team of 3 student assistants (Mar-April 2020), who used the Songkick data as the basis for an internet search for each venue, generating a new, initial dataset. During this phase, the research team organised venues into categories, added additional information (including social media and website links), producing a dataset of 108 venues.

In Phase 2 (Mar-May 2020), the student assistants manually searched the internet for additional music venues not present in the initial dataset. Working through each Parliamentary constituency covering B-prefix postcodes, they added a further 90 venues to the database, giving a total of 198 venues.[23] Based on postcode information present in the database for each venue, the research team engaged in further web-scraping to gather supplementary data – this included information such venue opening times and capacity, and whether a venue had an outdoor space (this latter element being relevant to Covid-19 restrictions on live music). The amalgamated information was combined into a geographical map and database using R and deployed as a Shiny application.[24]

Figure 1: A breakdown of stakeholders' type that the BLMP engaged with. Distinction per type of an actor.



When the map launched on Monday 1st June 2020, the project entered a third phase, focused on crowdsourcing data (Jun-Aug 2020). The publicly available map contained a web form that enabled local industry stakeholders and the public to provide additional information by adding missing venues or by suggesting amendments to those already listed. Phases 4 and 5 (Jul-Dec 2020) focused on the verification of information submitted during this phase, culminating in publication of a final version of the map in February 2021. At the publication of this report, the BLMP Map listed 195 venues. Although we make no claims that this figure is exhaustive, it nevertheless represents the most comprehensive mapping exercise of music venues in the city to date, and as such provides the best available snapshot of Birmingham's live ecology.

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.[25] 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,[26] identifying niche areas requiring funding, and suggesting directions for cultural policy investments.[27] The maps explicitly links music to place, space, and community, allowing us a more informed discussion about the role of music in and for communities.[28]

Surveys

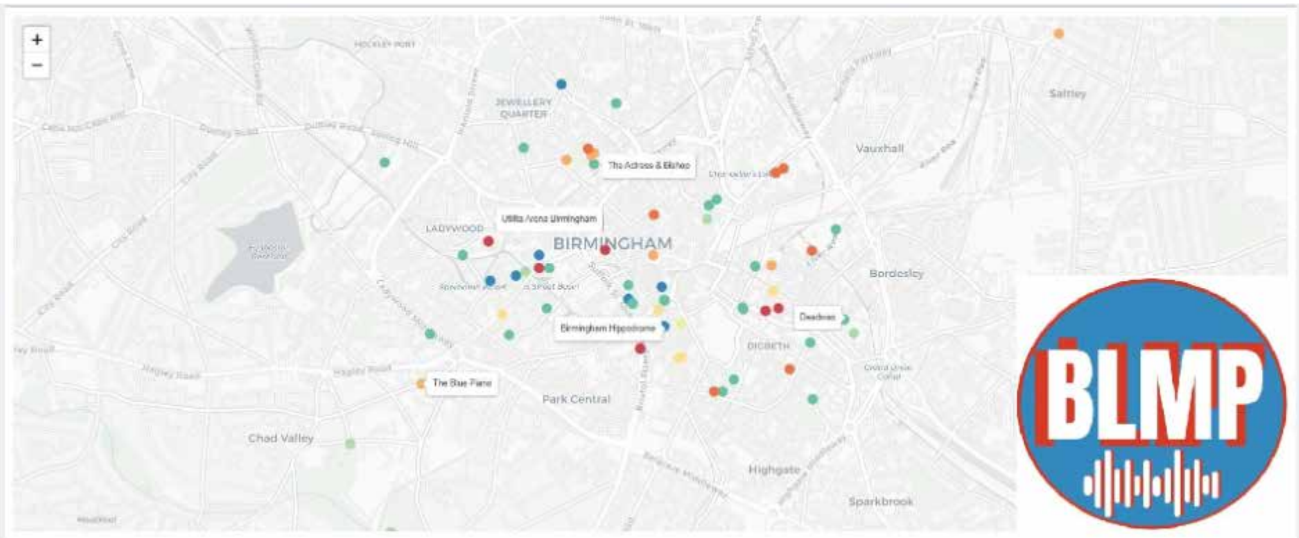
The methods above were complemented by two online surveys designed to gather a broader perspective on a number of issues. The online surveys were promoted via the BLMP website and the project's social media channels (Facebook, Twitter and Instagram) and hosted on the Jisc server. Respondents were given two options as to which survey they wished to complete – audiences (AS) or musicians (MS) – and were encouraged to answer more than one survey if they identified as both a musician and an audience member. The surveys were open between 4th Aug and 21st Nov 2020. To increase response rates, participation in the surveys was incentivised through use of Amazon Vouchers. We received 93 and 60 responses respectively.[29]

The text of the surveys was based on the UK Live Music Census surveys,[30] but adjusted for location and current circumstances (i.e. Brexit and Covid-19). The audience survey included questions about live music experiences in Birmingham and beyond, expenditure, the perceived value of live music beyond the economic, and the challenges posed by Brexit and Covid-19. The musician survey collected feedback about: musicians' careers; the relevance of the local live music ecology; touring and transport; income and expenditure; funding; and the impact of Brexit and Covid-19.

A mixed methods approach

The multiple methods approach described above allowed us to capture insights regarding a complex set of phenomena from a varied network of people and organisations. We aimed to cover purely economic indicators (e.g. cost benefit analysis and box office statistics)[31] and also socio-cultural impact data, recognising that these factors influence live music involvement and will have indirect impacts on the people and communities that experience them. This reflects

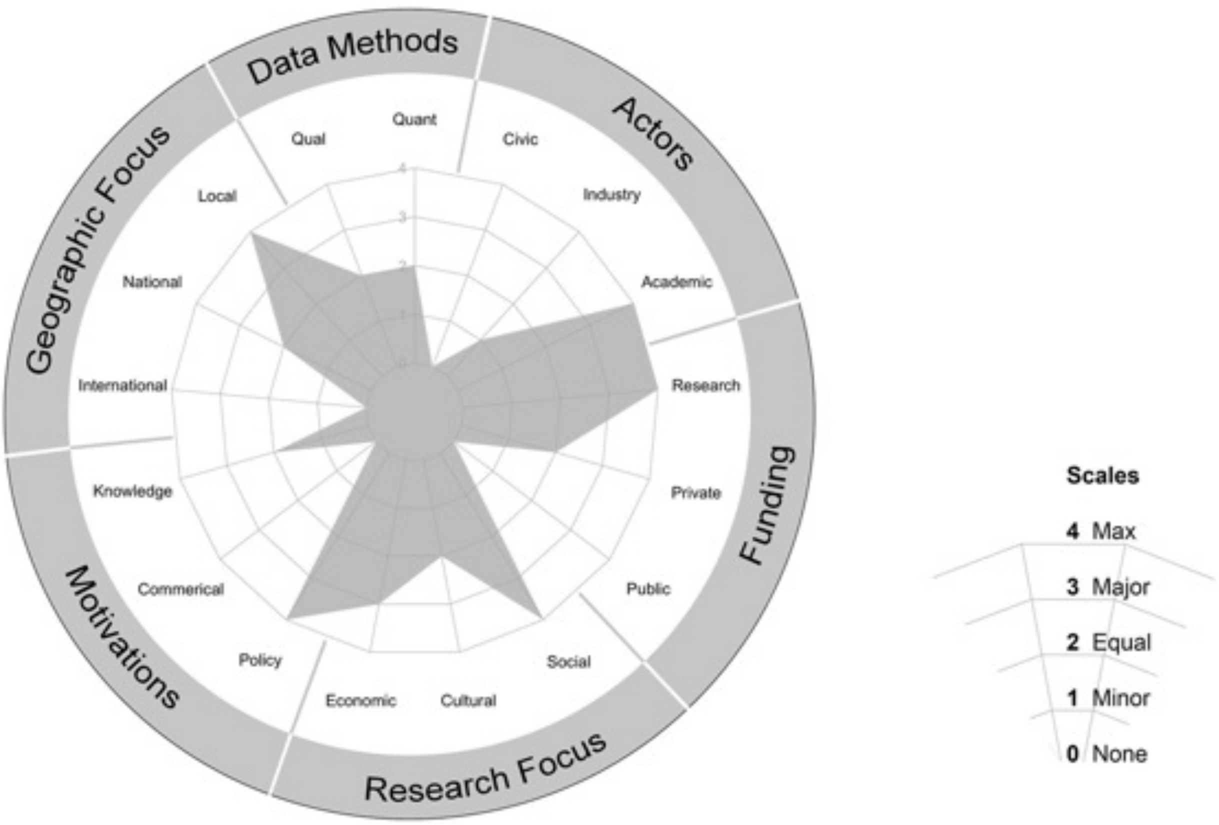
Figure 2: Birmingham Live Music Map



the idea that cultural markets differ from other markets and cannot be adequately explained in purely economic terms,[32] and that more than economic values are at stake in the provision of cultural goods.[33] In the model proposed by van der Hoeven et al. (2021)[34] for categorising, understanding and developing live music measurement - which the research team co-authored - this research approach scores high on local geographical focus and demonstrates an emphasis on policy influence/support and informing potential lobbying activities (Figure 3).

The methods outlined in this section were deployed during this project in order to generate a range of data, from different perspectives, that could be combined to produce a detailed picture of the current state of the live music sector in the city of Birmingham. Some of the project methods (and in particular those around mapping) were designed to be replicable, and - at the time of writing - these are already being adopted by other urban centres. Other methods (surveys, interviews, etc.) are well established and widely used. The manner in which we have combined the various methods deployed is and will remain a work in progress. As our report demonstrates, the live music ecology is complex and subject to rapid change. It thus follows that any attempts to measure, study or otherwise make sense of this area, should also be flexible and ready to adapt to change.
In the following section, we provide an overview of the city of Birmingham and its live music industries, and in particular we focus on mapping activity undertaken by the project.

Figure 3: Measuring music values model - BLMP



10. Firth, S., Brennan, M., Cloonan, M., & Webster, E. (2013) *The History of Live Music in Britain. Volume I: 1950-1967, from Dance Hall to the 100 Club*. Farnham: Ashgate.

11. van der Hoeven, A., Behr, A., Hamilton, C., Mulder, M. and Rozbicka, P. (2021), "1-2-3-4! Measuring the values of live music: methods, models and motivations", *Arts and the Market*, 11:2, 147-166. https://doi.org/10.1108/AAM-09-2020-0041

12. Behr, A., Brennan, M., Cloonan, M., Frith, S., & Webster, E. (2016). 'Live Concert Performance: An Ecological Approach', *Rock Music Studies*, 3:1, 5-23.

13. Beyers, J., Eising, R. & Maloney, W. (2008) 'Researching Interest Group Politics in Europe and Elsewhere: Much We Study, Little We Know?', *West European Politics*, 31:6, 1103-1128.

14. Wall, T. (2008) "Making money out of music: the role of music and radio in regional economic development" BOX 1:07.

15. Behr, A., Brennan, M., Cloonan, M., Firth, S. & Webster, E. (2016) 'Live Concert Performance: An Ecological Approach.' *Rock Music Studies*, 3:1, 5-23.

16. "West Midlands and the (international) business of Creative Culture – A globalized local perspective", *YouTube*, uploaded by BLMP 23 September 2020. Available at: https://youtu.be/EQkgS0ztOAA [Accessed 1 November 2021]

17. "The UK Live Music Industry in the Post-2019 Era", *YouTube*, uploaded by BLMP 12 January 2021. Available at: https://youtu.be/Bkd1aFwUcvg [Accessed 1 November 2021]

18. "CW2022 Cultural Programme and impact of the Brexit- Covid on Birmingham – BLMP Workshop" *YouTube*, uploaded by BLMP 21 January 2021. Available at: https://youtu.be/ivik23tmmDo [Accessed 1 November 2021]

19. https://birmingham.livemusicresearch.org/map

20. cf: Webster, E., Brennan, M., Behr, A., Cloonan, M. and Ansell, J. (2018) *Valuing live music: The UK Live Music Census 2017 report*. Available at: http://uklivemusiccensus.org/#report [Accessed: 5 January 2021]

21. https://www.songkick.com/

22. For the technical details of the process, please see the following post: Hamilton, C. (2020) 'Create an interactive map of the live music venues in your city with the Songkick API'. Available at: https://www.popmusicresearch.org/post/songkick-bham-map/ [Accessed: 16 December 2020]

23. This highlights the limitations of researching live music ecologies through the prism of marketing and online platforms, which may not pick up some smaller or unorthodox venue spaces.

24. Shiny is a software package for building web applications in the programming language 'R'. https://shiny.rstudio.com

25. Hamilton, C. (2020) 'Create an interactive map of the live music venues in your city with the Songkick API', *PopMusicResearch.Org*, 20 January. Available at: https://www.popmusicresearch.org/post/songkick-bham-map/ [Accessed: 16 December 2020]

26. Behr, A., Webster E, Brennan M, Cloonan M, Ansell J. (2019), "Making live music count: the UK live music census", *Popular Music and Society*, 43:5, 501-522. https://doi.org/10.1080/03007766.2019.1627658.

27. Wall, T. (2008) "Making money out of music: the role of music and radio in regional economic development" BOX 1:07. Available at: https://wallofsound.files.wordpress.com/2007/07/box_1_07.pdf [Accessed: 24 Sep 2020).

28. Buttigieg, B., Cantillon, Z., Baker, S. (eds.) (2019) *#Sounds of our Town. The Birmingham Edition*. Available at: https://acf72f70-710a-40b9-92db-5b7934011262.filesusr.com/d/8a61d6_004867ff143d471a9daa8df986ac1c44.pdf [Accessed: 4 January 2021]

29. The methodology was affected here by the pandemic itself, our original plan to survey venues in person being reconfigured at short notice toward online delivery – at a time when venues were largely inactive – both of which necessarily impacted on response rate.

30. Webster, E., Brennan, M., Behr, A. and M. Cloonan with J. Ansell (2018). *Valuing live music: The UK Live Music Census 2017 report,* http://uklivemusiccensus.org/wp-content/uploads/2018/03/UK-Live-Music-Census-2017-full-report.pdf [Accessed 15th December 2020]

31. Angelini, F. and Castellani, M. (2018), "Cultural and economic value: a critical review", *Journal of Cultural Economics*, 43, 173-188. https://link.springer.com/article/10.1007/s10824-018-9334-4
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32. Holt, F. (2010) "The Economy of Live Music in the Digital Age." *European Journal of Cultural Studies* 13:2, 243—261. https://doi.org/10.1177/1367549409352277
Velthuis, O. (2005), *Talking Prices: Symbolic Meanings of Prices on the Market for Contemporary Art,* New Jersey: Princeton University Press.

33. Klamer, A. (2004), "Cultural goods are good for more than their economic value", in Rao, V. and Walton, M. (eds.), *Culture and public action.* Stanford, Ca.: Stanford University Press, , 138-162.

34. van der Hoeven, A., Behr, A., Hamilton, C., Mulder, M. and Rozbicka, P. (2021), "1-2-3-4! Measuring the values of live music: methods, models and motivations", *Arts and the Market,* 11:2, 147-166. https://doi.org/10.1108/AAM-09-2020-0041

Often claimed to be the UK's 'second city', its population of over one million, is larger than that of Liverpool and Manchester combined. It is also geographically larger, covering 103.4 square miles. 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).

Birmingham – the 'second city'

Birmingham, the 'second city' of the UK, or the 'City of a Thousand Trades',[35] is a comparatively large city. Often claimed to be the UK's 'second city', its population of over one million, is larger than that of Liverpool and Manchester combined.[36] It is also geographically larger, covering 103.4 square miles.[37] In European terms, its size, population and industrial structure resembles Lyon (France), Lille (France), Budapest (Hungary), Athens (Greece) and Marseille (France).[38] 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). Aside from its historical and ongoing contribution to popular music culture, Birmingham's various physical, economic, industrial and social characteristics make it a useful case study for exploring live music ecologies in urban areas.

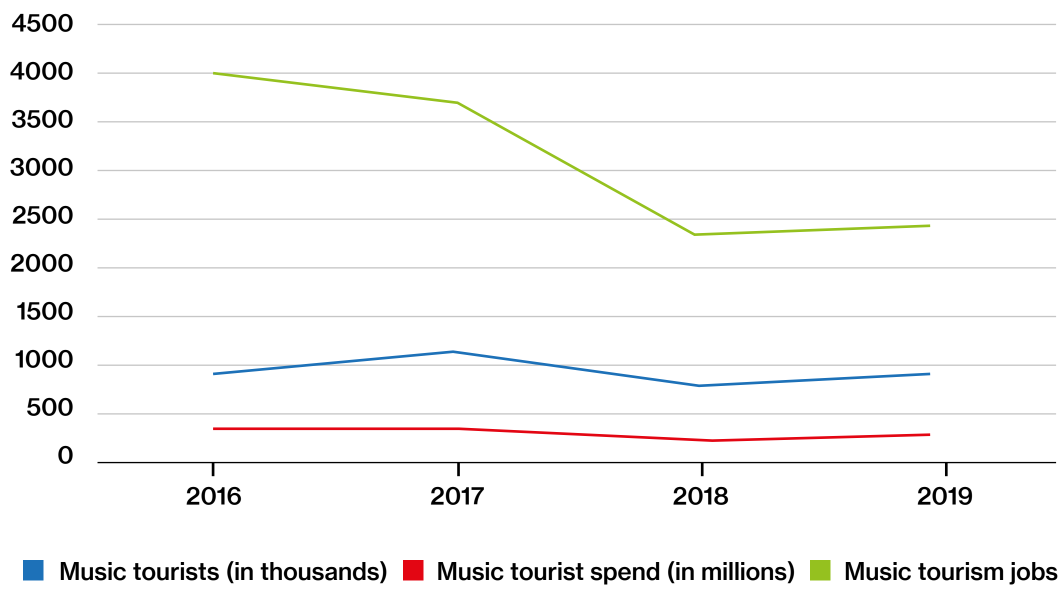
In the following sections, we provide some contextual detail about the city alongside data generated by the project. Based on our observations, we close this section with some recommendations that may also be considered for comparable cities.

Historical and cultural value of live music in the city

Birmingham's music scene has contributed significantly to the national music portfolio. From the early days of post-war Britain through to the present day sounds of Grime, it has a long, rich history of producing a vibrant popular music culture. The city's musical heritage includes acts such as Black Sabbath, Duran Duran, The Beat, Steel Pulse, Judas Priest, and Electric Light Orchestra. It has played a role in the establishment of the bhangra genre[39] and is home to the City of Birmingham Symphony Orchestra. UB40's first gig took place at the Hare & Hounds in Kings Heath (B14 7JZ), Black Sabbath have their roots in the Aston area (B6) and played their first gigs in The Crown pub in the city centre (B5 4DA). A younger generation of musicians, such as Laura Mvula, Lady Leshuur, and Jaykae, are part of a successful and diverse local scene that continues the city's tradition of producing artists with an international profile.

This vibrancy is confirmed in the diversity of gigs attended by audiences pre-Covid-19 (AS, Q8). 21% of our respondents had last attended an Indie event, 13% a Rock event, and 9% a

Figure 4: Music Tourism in West Midlands as measured by music tourists, their spend and FTE jobs it generates.
Source: UK Music (2017, 2018, 2019 and 2020) Music by Numbers



dance/electronic event, but the remaining gig-goers reported attending a multitude of music genres and styles: folk/acoustic music (7%), punk (6%), metal (5%), classical (3%), experimental (3%), blues (2%), hip hop/rap (2%), pop (2%), reggae/dub/ska (2%), and urban and R&B (2%).

Additionally, and relatedly, the live music sector in Birmingham has a history of social inclusion with a focus on working class and ethnic minority musical acts. For example, the 'Celebrating Musical Inclusion' project[40] and the 'Birmingham Music Hub',[41] are two of a number of recent initiatives that have celebrated Birmingham's varied musical heritage. Others have included the 'Birmingham Music Archive',[42] 'Made in Birmingham: Reggae Punk Bhangra',[43] 'Home of Metal',[44] and initiatives focused on individual places of significance, the Mother's Club, the Catapult Club, and the Que Club.

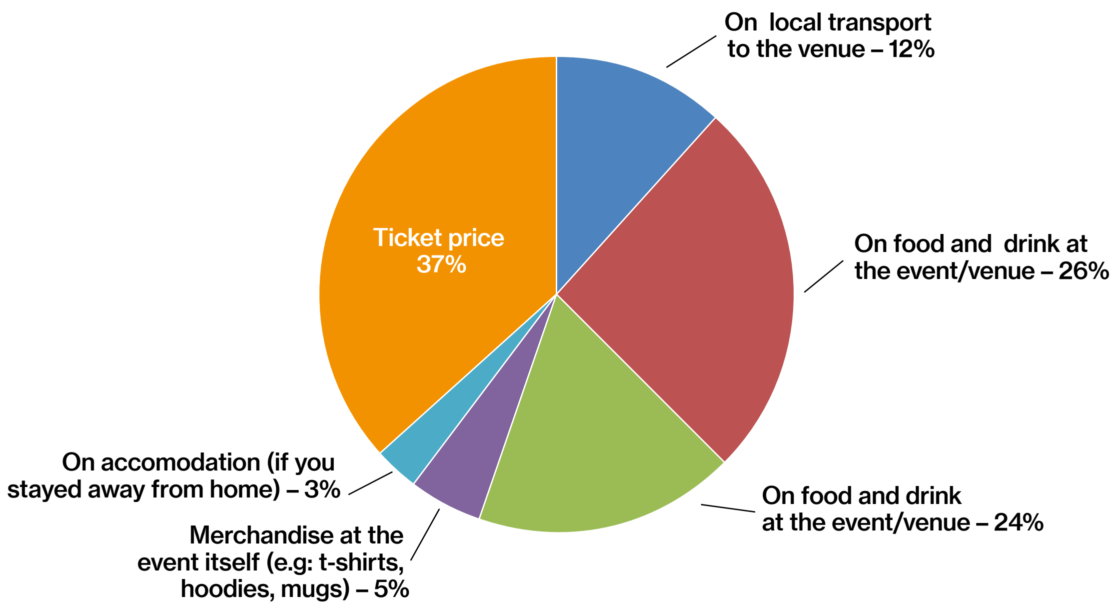
Economic value of live music in the city

The urban cultural economy of Birmingham and its surroundings also has a notable value in bringing 'music tourism' and jobs into the city and the West Midlands region. UK Music estimates that music tourism brought in 877,000 tourists to the West Midlands region in 2019 (19% growth from 2018; both domestic and overseas) spending £252 million (in comparison to £211 million in 2018; including direct and indirect spend). This in turn has generated 2,453 FTE jobs (Figure 4).[45] The West Midlands region welcomes 7% of the nation's music tourists. This underpins the region's employment of 5% FTE of the national music tourism workforce. The region is ranked 4th in the country, behind London and the South West, South East (Brighton), and the North West. The region's performance in this regard is comparable to those of the Manchester, Yorkshire and the Humber areas.

The average spend on a music related event in the city can vary between £5 (2.5%) to £190 (1.08%; AS, Q13). 51% of attendees responding to the survey spent less than £45, whilst 5% have no costs (e.g. attending local free events). The largest costs were tickets (37%) varying from £5 to £65, followed by spending on food and drinks at the venue (26%) and outside the venue (17%; Figure 5).

The scale of live event spend comes into perspective if we cross-tabulate it with the number of events attended on average per month. Our 93 respondents attended approximately 463 events each month pre-Covid-19, an average of approximately 5 events per person, each month. Over 48% of those were ticketed gigs at clubs and small venues, emphasising the importance of those types of venues to the overall ecology. Our respondents spent on average £20.84 per month on live music, highlighting the potential for revenue growth in a region of 1 million people. Our respondents were obviously committed gig-goers, more so perhaps than the public at large. Nevertheless, their spend illustrates the economic intensity of live music activity and the potential for growth and economic contribution to the region.

Figure 5: A spend on live events (% of total spend)



Birmingham Live Music Population Ecology: Venues in B-postcode

The Birmingham Live Music map, which at present includes 195 venues across the whole B-postcode, and 156 within its epicentre (postcodes B1-B48), demonstrates that Birmingham indeed has a wide variety of venues within its existing live music ecology. Pre-Covid-19, and across 195 venues within the B-postcode, there was capacity across the venues, to serve an estimated 98,000 people including a range, for instance, across a small gig in the Sunflower Lounge (B5 4EG) in the city centre (150 capacity), through to a 15,600 capacity show at Resort World (B40 1NT) on the city outskirts.

Our work with the map also demonstrates that Birmingham has a variety of live music venue types, ranging from social and student clubs (around 14% of total), all the way to large and medium live music venues (~3%), such as the O2 Academy (B11 DB). Predominant within the ecology revealed by our research are pubs, bars and small venues (49.36% of total), each with a capacity below 400. Within these, however, musical activity is not always the sole or primary purpose; the figure includes bars and restaurants that occasionally host live music performances. This points towards some aspects of a local cultural ecology that are hard to capture when talking about a live music economy (see: Figure 6). While those places are not strictly speaking live music venues, they still provide employment and platforms for local operatives that are relevant for the city's live music ecology as a whole. Dedicated music venues act as key nodes within an urban live music ecology, while live music activity more broadly serves a range of places and spaces. These networks span out across the city and their relationships – especially in providing income for musicians, and opportunities for audiences to encounter live music – warrant consideration.

Figure 6: Table Categories of the venues (B1-B48)[46]

Code	Description	Per
arena	Arena (5,000-20,000): large, covered, multi-purpose arena or conference centre	1.92%
arts	Arts centre (200-2,000): multi-arts, multi-purpose venue	3.85%
bar	Bar, pub with music (20-100): main focus is alcohol sales with occa sional music	44.23%
church	Church/place of worship: place of worship which hosts live music events beyond its regular services	1.28%
concert	Concert hall/auditorium (200-3,000): dedicated music venue, mainly seated gigs	2.56%
hotel	Hotel or function room	1.92%
largeclub	Large nightclub (>500): dedicated music venue, mainly standing gigs	3.85%
largemusic	Large music venue (651-5,000): dedicated music venue, mainly standing gigs	1.28%
medvenue	Medium music venue (351-650): dedicated music venue, mainly standing gigs	1.28%
other	Other (20-1,000): venues which are used for live music occasionally and do not fit into the above categories	3.85%
outgreen	Outdoor (greenspace), e.g. parks used for festival	2.56%
rest	Restaurant/café with music (20-100): main focus is food with occasional music	7.05%
smallclub	Small music venue (<500): dedicated nightclub mainly for dancing	0.64%
smallvenue	Small music venue (<350): dedicated music venue, mainly standing gigs	5.13%
social	Social club/community centre/village hall/sports hall: meeting place, generally formed around a common interest, occupation, activity or location	12.18%
student	Student union/university building	1.92%
theatre	Theatre/opera house (500-2,500): mainly theatre with some live music/opera	4.49%
		100

The range of Birmingham's live music venues resembles the profile of other cities previously studied using similar approaches (Figure 7). As with Liverpool, for instance, 44% of 158 venues in or around the city centre are identified as being bars and pubs.[47] The percentage of music and arts venues in the city (25%) matches that of Oxford, and to a lesser degree Glasgow and Newcastle, but it falls far behind those in Liverpool. One notable characteristic of Birmingham, however, is the relatively large percentage of 'unorthodox' venues (that do not fit other, more 'standard' categories), (29%), which includes university buildings, restaurants, social clubs and outdoor spaces. For example, there are a large number of outdoor events organised within city limits (e.g. Moseley Folk and Jazz at Moseley Park, B13 8DD; Swingamajig at the Birmingham Botanical Gardens, B15 3TR; or the Vale Fest, B15 3SX).

This is backed up also by a simple analysis of the raw data. Taking the location of Birmingham New Street station as the central point of the city centre, we can observe that 13% (26) of the 195 venues in the database are within 0.5 miles of that point. These are venues that can be reasonably said to be at the heart of the city centre. Given that much of Birmingham city centre has been pedestrianised over the last two decades, and given also the development of the Metro - a tram which serves an increasing number of city centre locations, and which is connected to the mainline New Street Station - we may also reasonably expand the definition of the city centre venues to locations with 1 mile of New Street station. Based on this, 67 (34.35%) of the 195 venues in the database are within the city centre, with 26 (13%) within 0.5 miles of New Street and a further 41 (21%) within a mile.

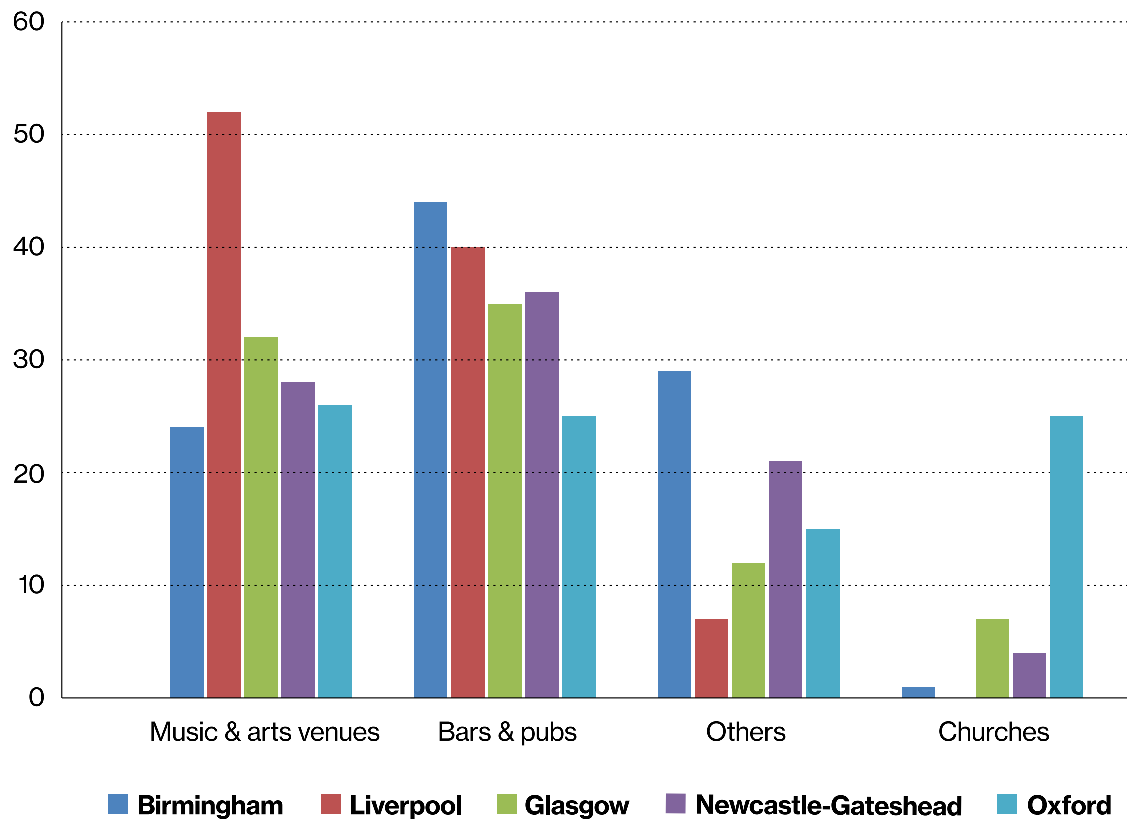
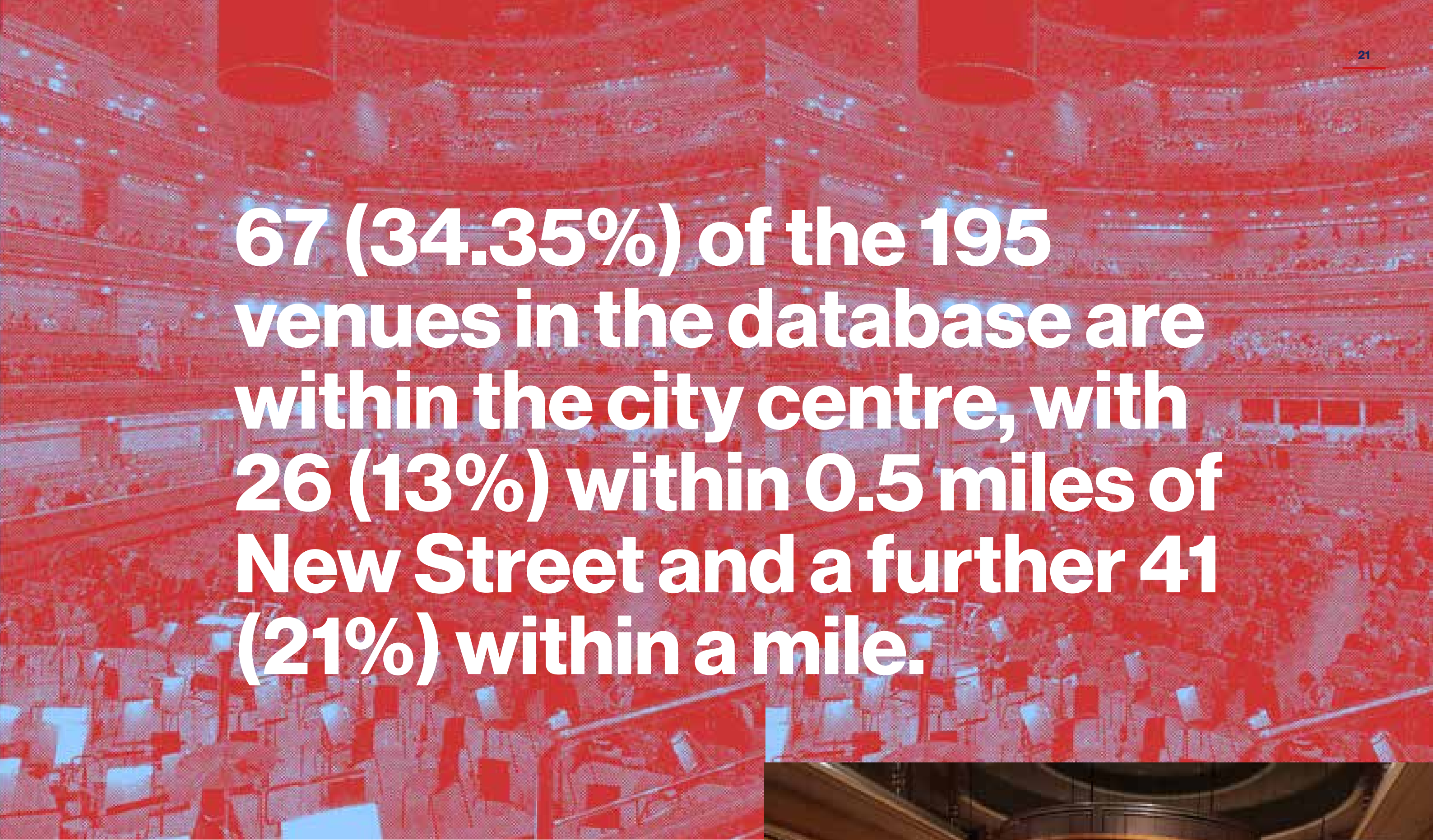


Figure 7: Birmingham's live music venues' breakdown in a comparative perspective to Liverpool, Glasgow, Newcastle Gateshead and Oxford. Source: BLMP, UK Live Music Census 2017, UK Liverpool Live Music Census 2017

Geographical spread

In relation to the geographic spread of the venues across the city, data points concerning venue location (specifically, postcodes and latitude and longitude coordinates) were gathered for each of the 195 venues. In the first instance, these data points enabled the plotting of venues on a city map, which produced a quick and user-friendly visual representation of how - as one may expect of any city - there is a concentration of music venues in the city centre.

The map and data also demonstrate how certain suburbs (for instance, Moseley and Kings Heath) have clusters of venues that compare to some degree to the concentration seen in the city centre. These neighbourhoods are well known within the city as hubs of musical activity, and this local informal knowledge is replicated in online and other tourist materials; in short, the mapping exercise merely confirms what can be reasonably assumed as common,



67 (34.35%) of the 195 venues in the database are within the city centre, with 26 (13%) within 0.5 miles of New Street and a further 41 (21%) within a mile.

local knowledge. However, we can also observe clusters of venues in other areas of the city not commonly associated with being musical hubs. For example, Sutton Coldfield - a suburb in the far north of the city - has 22 venues (11.2% of total venues, and 17% of all non-city centre venues). It is worth noting, though, that 77% of these venues are pubs and bars that offer occasional music as part of their wider offer. A similar story is repeated in another northern area of the city, Erdington. 64% (9) of its 14 venues are pubs and bars, and a further 29% (4) are social clubs or churches. Although Erdington plays a role in Birmingham's rich musical heritage - in the main due to it being the location of the Mothers venue in the 1960s and 1970s which played host to many world-famous acts, including being the location where Pink Floyd recorded part of their Ummagumma album - the suburb (along with neighbouring Sutton Coldfield) does not feature extensively in present day narratives around musical activity in the city. Our meetings with local stakeholders[48] identified a 'north/south' divide in the city, with the north being seen as a poor relation in terms of musical activity and opportunities. The data from the mapping exercise suggests that there are comparable amounts of activity in the north and south, but suggests that what is happening in the north occurs on a more informal, localised basis and is not plugged into the same national/international mechanisms (touring acts, national promotion networks, etc.) in the same way as venues in the south of the city. Nevertheless, the activity revealed by the map suggests that any future efforts to organise and develop activity in the north of the city would be building on a solid foundation. The establishment of venues in the north of the city that may compete with - or complement - some of the more lauded venues of the city centre and southern suburbs would strengthen the overall musical offering of the city considerably.

Based on the geographical data points, it is possible to explore additional routes to knowledge that may help shed further light on the local live music ecology. Datasets publicly available from government (e.g. land registry), local councils (e.g. Birmingham City Council) and other sources (e.g. ONS) are often organised according to either postcode and/or geographical references points. This could augment the BLMP venue data set with additional variables concerning certain social and economic conditions at venues locations, thus affording the possibility of considering the geographic spread of venues in new ways. At this stage of our work, such analysis remains in a relatively rudimentary form. It nevertheless hints at the possibility of further methodological development that could assist local stakeholders with lobbying and other funding activities.

For example, when visualising the spread of venues in the city according to the Average Income and Indices of

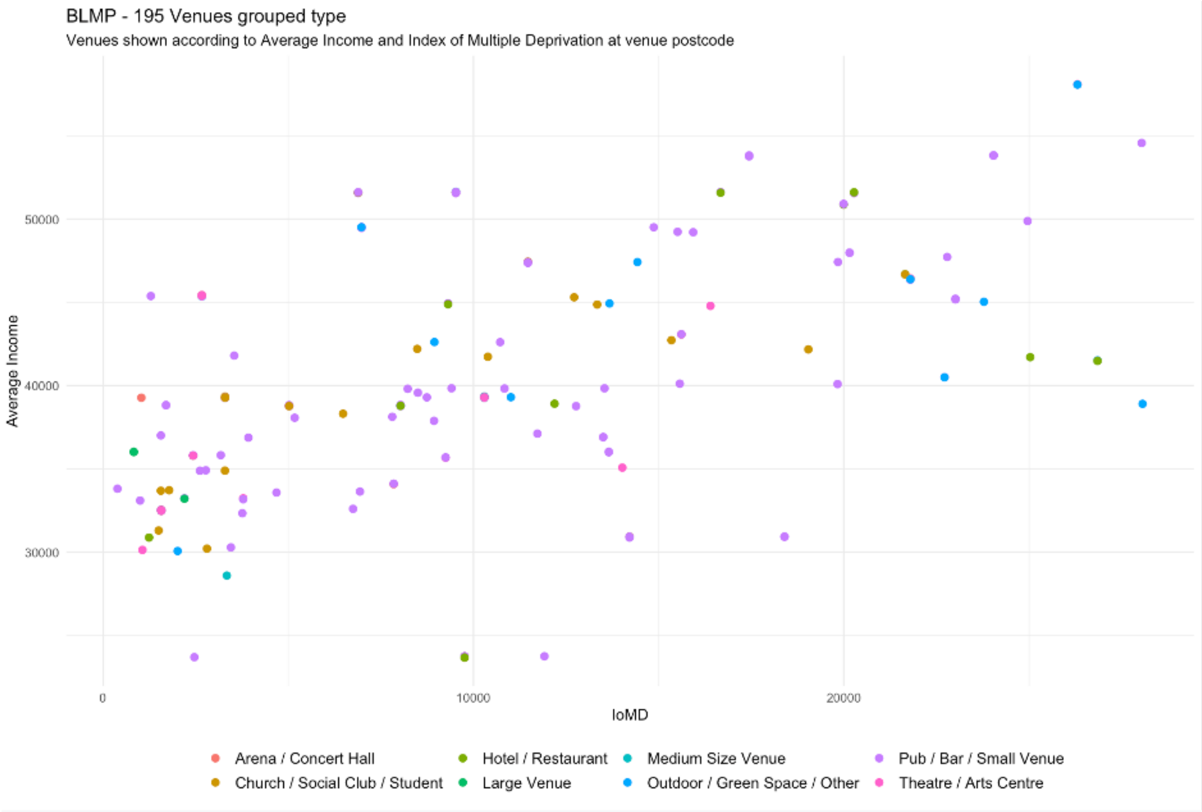


Figure 8: 195 venues in Birmingham grouped according to venue type and according to Average Income and Index of Multiple Deprivation at venue's postcode

Multiple Deprivation (IoMD) at each venue postcode, we can observe a marginally higher concentration of venues in the poorer areas of the city (those towards the bottom left of the graph) compared to the more affluent (those in the top right; Figure 8). [49]

We can also observe the following:

- Venues classified as Outdoor / Green Space / Other - signified by blue dots on the plot - are more commonly found in areas where average incomes are greater than £40,000 per annum and/or where areas are classified as least deprived.
- This also applies to venues classified as Hotels / Restaurants - signified by pale green dots. Conversely, venues classified as Church / Social Club / Student (brown dots) or a Theatre / Arts Centre (pink) are concentrated largely in areas where incomes are lower.
- Further, we can also observe a relatively tight cluster of venues where average incomes range from £38,000 to £47,000. These are areas that are comparatively more affluent than the poorest areas of the city, but which are still within the lower 50% of the country as a whole.

Data and analysis of this kind could be potentially useful in relation to issues such as gentrification and the application of the Agent of Change principle. For example, looking at the 67 venues in the City Centre only (Figure 9), we can observe the range of different levels of income and deprivation within a one mile radius of New Street Station and the relatively large number of venues situated in areas where income is low and deprivation is high. More interesting from the point of view of issues relating to the Agent of Change and gentrification, however, are the 5 clusters of venues we can observe in locations where income exceeds £45,000 per annum - a total of 27 venues, or 40% of all city centre locations. Only 10 City Centre venues (15%) are located in areas where the average income is lower than £30,000 per annum.

Considering the links between music venues and issues of regulation (discussed elsewhere in this report), it seems clear that efforts need to be made to protect venues in both deprived areas and in those where property developments are adding to issues linked to 'gentrification' (noise complaints, rising rents). In this regard, we know that there is evidence of nascent live music activity in some comparatively underdeveloped areas. This could be harnessed to develop routes to sustainability and growth. Bringing cultural activity further to the forefront in development and regeneration plans could include being mindful of cultural activity that is currently less visible but could support growth as long as building and development is sensitive to its presence.

Intangible value of venues

To better understand the social and cultural value of the venues in the city, we asked both gig-goers and musicians about venues which have been particularly significant to them and why. Venues were valued across a spectrum of options: material, social, aesthetic, symbolic, and narrative values (Figures 10 & 11). For gig-goers, the social value of

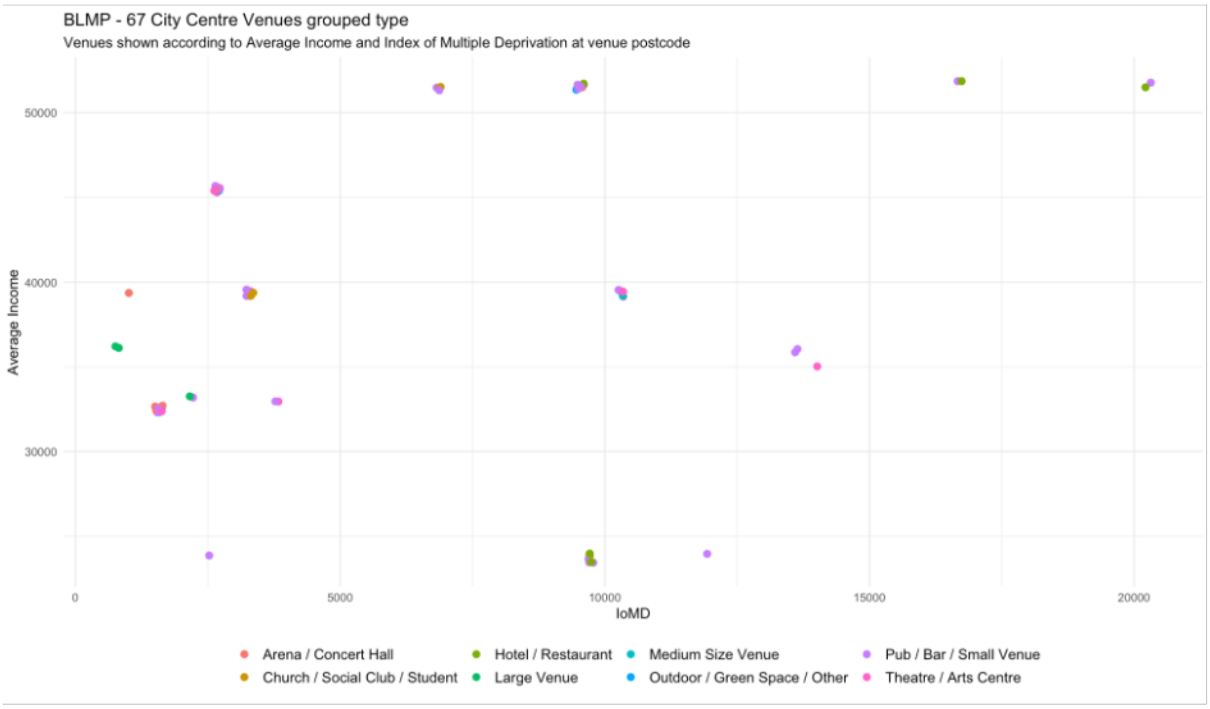
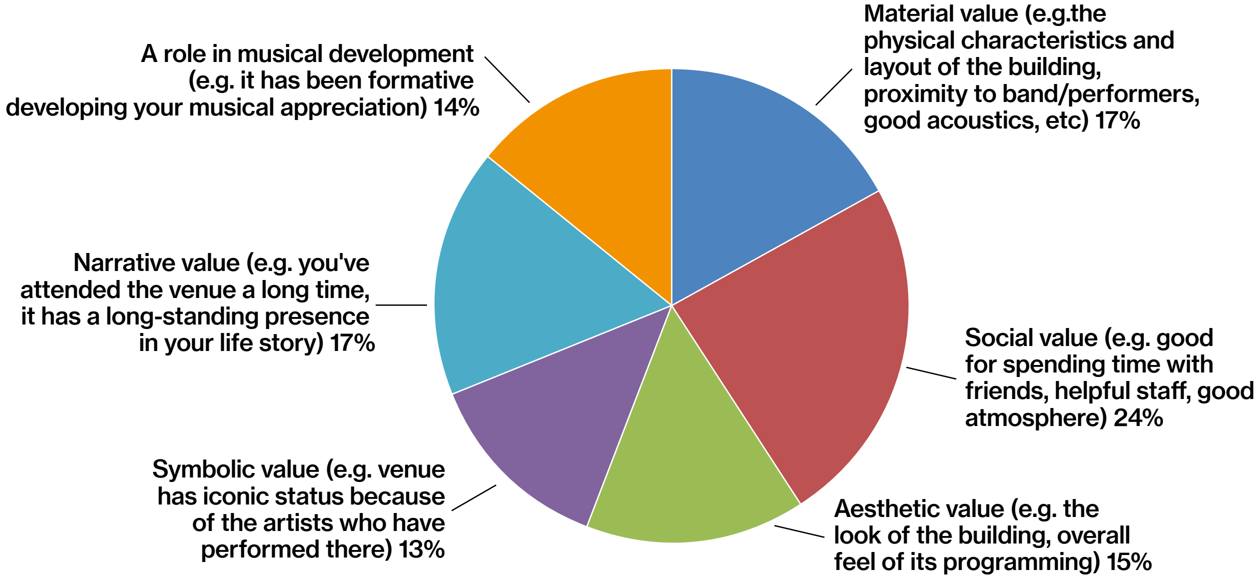


Figure 9: 67 city centre venues grouped by type and Average Income and Index of Multiple Deprivation at venues' postcode

a venue (24%) was predominant. Venues were valued as being a good place to spend time with friends and family, to make new friends or acquaintances, where the staff are friendly, and the atmosphere is good. This in particular links the operation of live music venues to the community creation and wellbeing of its patrons. For musicians (Figure 11), almost equal value was attached to the material (20%) and social (19%) value of venues, followed by venues' role in their musical development (18%). The venues are valued here for being sites for inspiration and creativity, the development of new skills, and for building confidence as a performer. This highlights the extent to which venues are an intrinsic part of the whole live music ecosystem.

Much work on the live music industries has historically measured the economic value of live music and tended to concentrate less on its social and cultural value.[50] As more recent censuses and qualitative work have shown, a more holistic understanding is necessary.[51] From the above responses, we can see the potential for live music venues to be socially and culturally valuable in a variety of ways, both fundamentally – as sites of social and artistic activity – and instrumentally through the broader benefits that accrue from these activities. Such value may not be necessarily easy to measure, but particularly with matters like health and well-being, there are clear benefits for gig-goers, performers, and for society at large.

Figure 10: The importance of the live music venue last attended by the gig-goers survey (%)



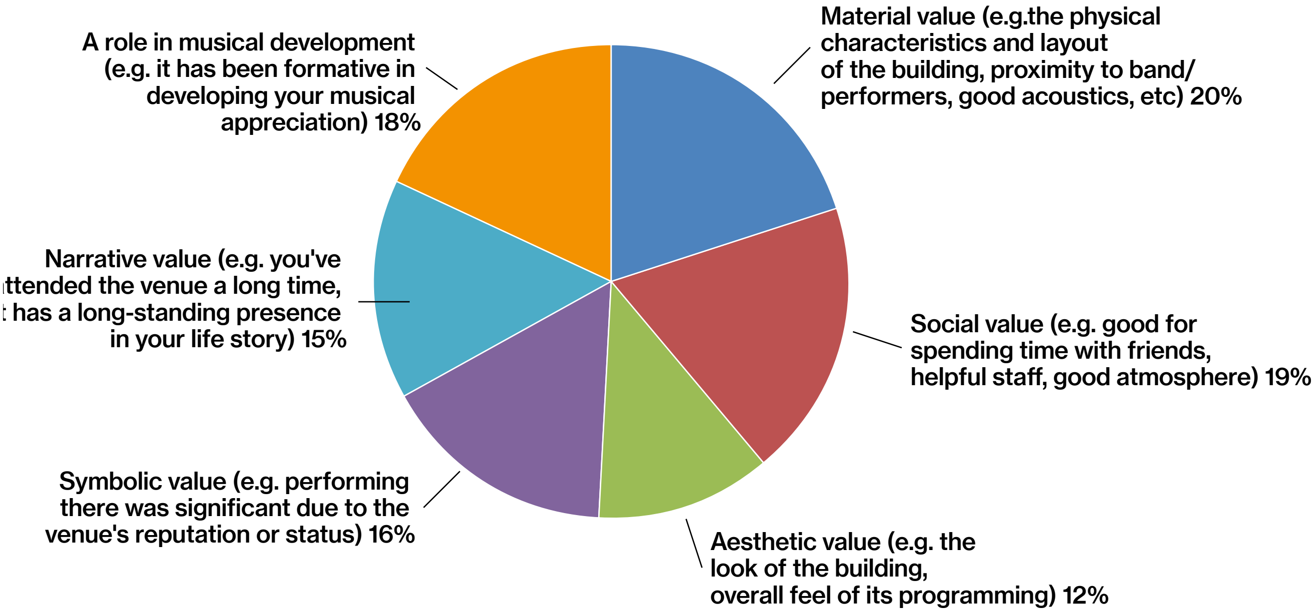


Figure 11: The importance of the venue at which the surveyed musicians performed the last time (%)

Concluding remarks

In this section, we have introduced Birmingham and its live music ecology. We focused first on the city's historical and cultural value, followed by economic estimates of the live music industry's contribution to the city and the West Midlands region. We also introduced the Birmingham Live Music Venue Map and looked into the numbers, types, and geographical spread of venues across the B-postcode area, underlining also the non-material cultural and social value of those spaces.

As this section illustrates, smaller spaces (bars and pubs) are significant in the overall live music ecology of Birmingham. It is important to view those venues as nodes within larger ecological networks, providing employment to a large number of musicians, promoters, agents, music industry professionals, venue staff and owners in the region. Those small scale venues are also end-points of a vast supply chain, indicated by proxy through night spend (e.g. food and drinks purchased at/outside the event/venue). Infrastructural development (such as transport networks) can harness that potential in ways that could grow and sustain the already vibrant live music ecology in the city. The combination of culture and commerce that produces self-sustaining regional music economies[52] comes from the workings and operations of a diverse live music ecosystem. This includes the fact that those spaces are crucial community and socialising hubs, as indicated by our gig-goers survey.

Despite their predominance in the city, the pubs, bars and grassroots venues that play host to live music do not have it easy. Under long-term pressure from urban city development (e.g. Flapper, B1 2NU) and gentrification (The Crown, B5 4DA), as well as the more recent pressures of Covid-19 (to which we refer in a later section), potential closures should prompt reflection on the risk that if the city loses venues, they may be hard to replace. This in part is because venues produce the next generation of entrepreneurs, promoters, musicians and other stakeholders who make such businesses possible.

In the following section, we build upon the discussion presented above through an exploration of the live music ecology of Birmingham that focuses on socio-cultural and economic change. Based on what we have discussed in this section we can make the following recommendations.

Recommendations

RECOMMENDATION (i): We recommend that local authorities recognise pubs and bars, along with grassroots music venues, as a crucial network and as potential sites of artists and audience development, not only as community building assets but also cultural ones . This means the inclusion of these venues in the cultural policies of the city and hosting of live music events being defined as a factor enhancing chances of license application.

RECOMMENDATION (ii): We recommend that local authorities recognise the economic, social and cultural value of live music and live music venues, including grassroots venues, to the region; that planning, liquor licensing, environmental, health, culture and city regeneration strategies take account of the actual and potential contribution of live music. One way of doing this would be an across-policy approach, further enhanced by implementation of the Night-time Industry Impact Assessment coordinated by a Music Office and/or Night Major for the region.

RECOMMENDATION (iii): We recommend that greater attention is paid to a balanced population of venues across the city. In particular, the establishment of venues in the north of the city that may complement some of the more lauded venues of the city centre and southern suburbs would strengthen the musical offering of the city considerably.

RECOMMENDATION (iv): For researchers looking into the study of live music, we recommend a mixed method approach. The combination of methods, informed by the principles of the co-production of knowledge – and mindful of an 'ecological' approach to live music measurement – helps to produce inclusive datasets and a more detailed picture of the live music sector than qualitative or quantitative approaches alone.

35. Buttigieg, B., Cantillon, Z., Baker, S. (eds.) (2019) *#Sounds of our Town. The Birmingham Edition.* Available at: https://acf72f70-710a-40b9-92db-5b7934011262.filesusr.com/d/8a61d6_004867ff143d471a9daa8df986ac1c44.pdf [Accessed: 4 January 2021]

36. Birmingham City Council (2018) *About Birmingham – Population and Census*. https://www.birmingham.gov.uk/info/20057/about_birmingham/1294/population_and_census/2

37. Office for National Statistics (2016) *Standard Area Measurements (2016) for Administrative Areas in the United Kingdom.*

38. Centre for Cities (2020) City factsheet *Birmingham. How is the Birmingham economy performing, and what are the key policy issues facing the city?* Available at: https://www.centreforcities.org/competing-with-the-continent/factsheets/birmingham/ [Accessed: 17 December 2020]

39. Khabra, G. (2014). 'Music in the Margins? Popular Music Heritage and British Bhangra Music', *International Journal of Heritage Studies,* 20:3, 345-355.

40. City of Birmingham Symphony Orchestra (2018). 'Celebrating Musical Inclusion'. Available at:https://cbso.co.uk/event/celebrating-musical-inclusion [Accessed 2 October 2021]

41. Services for Education: Birmingham Music Education Partnership (nd.) 'The Birmingham Music Education Partnership. Available at: https://bmep.servicesforeducation.co.uk/ [Accessed 2 October 2021]

42. Birmingham Music Archive (nd.) *Birmingham Music Archive* website. Available at: http://www.birminghammusicarchive.com/ [Accessed 2 October 2021]

43. Birmingham Music Archive (nd.) 'Made in Birmingham – Reggae, Punk, Bhangra', *Birmingham Music Archive* website. Available at: http://www.birminghammusicarchive.com/made-in-birmingham-reggae-punk-bhangra-3/ [Accessed 2 October 2021]

44. Home of Metal (2019) 'Black Sabbath: 50 Years'. Available at: https://homeofmetal.com/event/black-sabbath-50-years/ [Accessed 2 October 2021]

45. UK Music (2020). *Music By Numbers: Music Tourism Data Map* https://www.ukmusic.org/research/uk-map/ [Accessed: 4 January 2021]

46. 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).

47. Here, it is also worth noting that when asked which type of venues the musicians regularly perform at (MS, Q36), most indicated bars and pubs, with fewer indicating multipurpose arts centres, concert halls/auditoriums, and small music venues. While this could reflect the individual preferences of the respondents, it does also suggest that the majority considers pubs and bars as their main option for their income generation, further underlining the importance of those venues in the city's live music ecology. Relatedly, when gig-goers were asked what would encourage them to see more live music, they indicated that more live music in pubs and bars would be a key (AS, Q20; 25.8% Somewhat agree, 28% Agree, and 21.5% Strongly agree).

48. Rozbicka P., Hamilton C., Behr A., Correa P., Davies L.J. (2019) *Birmingham Live Music and Brexit: Report I.* Birmingham, UK: Birmingham Live Music Project/Aston University/Birmingham City University.

49. The Indices are a set of relative measures across England used by government. As explained by documentation produced in 2019 by the Ministry of Housing, Communities and Local Government (now Department for Levelling Up, Housing and Communities), they are based on "based on seven different domains, or facets, of deprivation: Income Deprivation; Employment Deprivation; Education, Skills and Training Deprivation; Health Deprivation and Disability; Crime; Barriers to Housing and Services; Living Environment Deprivation. Deprivation is measured in a broad way to encompass a wide range of aspects of an individual's living conditions." Ministry of Housing, Communities and Local Government (2019). *The English Indices of Deprivation 2019: Frequently Asked Questions.* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/853811/IoD2019_FAQ_v4.pdf

50. van der Hoeven, A., Behr, A., Hamilton, C., Mulder, M. and Rozbicka, P. (2021), "1-2-3-4! Measuring the values of live music: methods, models and motivations", *Arts and the Market,* 11:2, 147-166. https://doi.org/10.1108/AAM-09-2020-0041

51. : Webster, E., Brennan, M., Behr, A., Cloonan, M. and Ansell, J. (2018) *Valuing live music: The UK Live Music Census 2017 report.* Available at: http://uklivemusiccensus.org/#report [Accessed: 5 January 2021]

52. Wall, T. (2008) 'Making money out of music: the role of music and radio in regional economic development'. *BOX papers,* 1:07, 20-21.

A healthy live music ecology in the city will require promoters to keep abreast of changes in the technological landscape over the coming years so that they can harness online systems in the best way possible.

47% of respondents predominantly consume music through on-demand streaming platforms such as Spotify, YouTube and Soundcloud.

Section 1 – Socio-cultural and economic changes

In this section, we focus on socio-cultural and economic factors from the perspective of the consumers – the fans and gig-goers - who make live music economically and culturally viable. We explore how people travel to shows, find out about events, and purchase tickets. We also look at the role of technology, and how the relatively recent emergence of technologies related to online services, social media and DDBMs (data-derived business models) are changing the manner in which concert-goers engage with live music. Through this, we illustrate the importance of venues to local communities, the willingness of regular gig-goers to buck wider trends around music consumption, and an intriguing mix of digital and offline methods in the promotion of live music activity.

Born in	Percentage	Cumulative
1940s	1.08	1.08
1950s	8.60	9.68
1960s	22.66	33.33
1970s	22.58	55.91
1980s	25.81	81.72
1990s	17.20	98.92
2000s	1.08	100.00

Figure 12: Average age of the respondents to the BLMP gig-goers survey

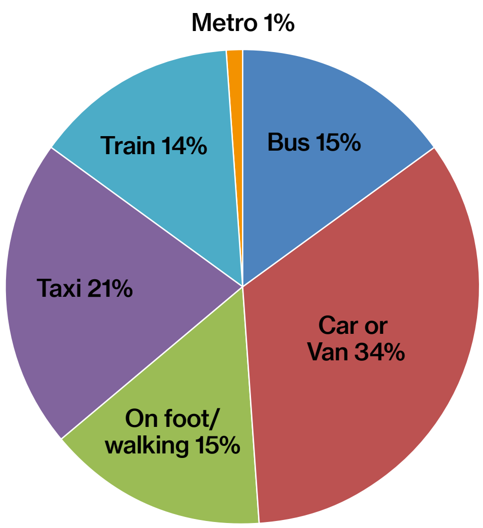
Birmingham gig-goers survey – respondent profile

Our survey data is drawn from people who regularly attend live music events. The data shows that the sample of the population responding to the survey is skewed towards an older demographic, with a large segment (48.39%) being made up of people in their 30s and 40s, and another sizable segment (33.34%) aged 50+. However, the data cannot tell the whole story. Although the survey did draw in 18.28% of responses from people in the under-30s bracket, this under-represents the 40% segment of Birmingham's under 25-year-old demographic. In this instance, the survey was additionally coloured by the context of taking place in the midst of the Covid-19 pandemic which made reaching beyond dedicated gig-goers more difficult. Future data-gathering exercises need to pay more attention to attempts to reach a range of ages more representative of the demographics of the city, and in particular those in the youngest demographic - born after 2000 - who represent the next generation of musicians, fans and industry workers.

The city's population has expanded in various stages over time, including the arrival of Irish, Afro-Caribbean, Pakistani, Bangladeshi, and Indian immigrants at various points.[53] This has generated a diverse population in terms of ethnic origin and one that continues to grow more diverse over time. Any understanding of the regional music economy that neglects such issues would be unable to provide a complete picture.[54] The ethnic make-up of the population sample drawn together by the survey is not fully representative of the picture produced by census data in 2001 and 2011, and particularly so in terms of the growth in non-white communities. Indeed, it is only in the Other (Arab) category that our figures exceed those of census data in percentage terms for non-white groups. Conversely, respondents representing White ethnic backgrounds (84.78%) exceed the wider picture in a city where white populations make up 58%. Given that non-white ethnic groups are under-represented in our survey whilst growing in terms of wider data, and as with age-ranges, this speaks to the need for efforts to be made in reaching non-white communities in subsequent data-gathering exercises so that the ~40% of non-white population under-represented in this data can be canvassed.

Clearly, there is a disconnect between the demographic make-up of our survey response population and the overall profile of Birmingham's population. As such, we couch our remarks below with obvious caveats. These results are merely indicative, although to some extent are likely to represent a sub-section of the city's population that are

Figure 13: Gig-goers survey response to the question about modes of transport to the venues (%)



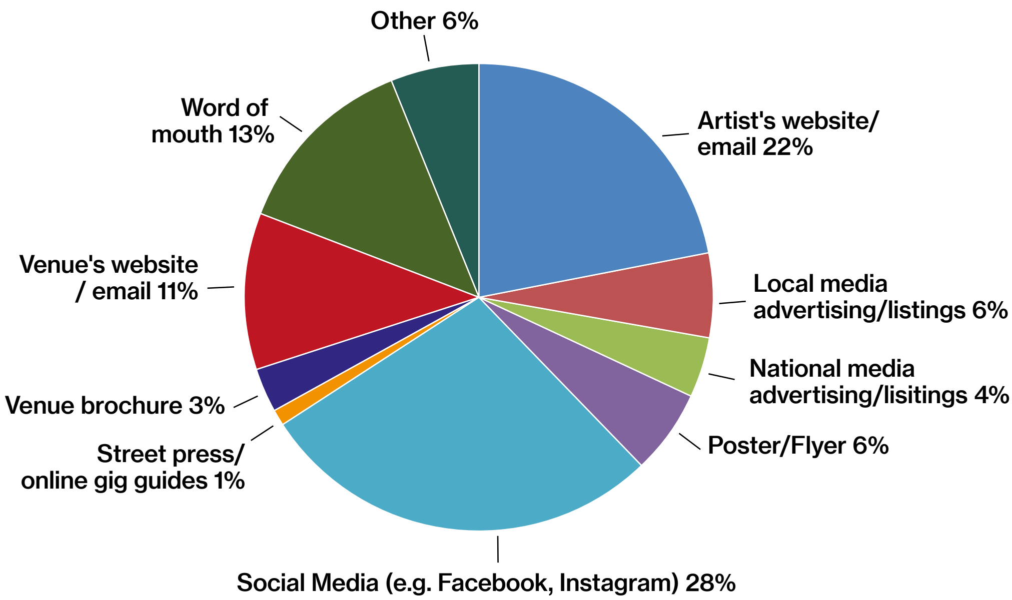
marginally more engaged with the commercial live music industries. It should also be noted that our survey activity took place in March and April 2020, during the earliest days of lockdown in the United Kingdom following the onset of the Covid-19 pandemic - far from ideal conditions in which to conduct research into live music. Our original plans to survey and map gigs in person with a team of researchers, observing the make-up of audiences and performances were, of necessity, cancelled. That being said, the results below provide useful starting points for the broader discussion we present.

Travel to gigs

Figure 13 above, for instance, shows the breakdown of responses to a survey question regarding travel to and from live music events. We can observe that over 50% of respondents used private transport for these journeys, with 33.6% using cars/vans and 21% travelling by taxi. Given the observations above regarding the age range produced by the sample - which is skewed towards an older demographic - the reliance on private transport may not be surprising. Nevertheless, these figures do speak to the general primacy of the car over other forms of transport within Birmingham generally, and highlight the importance of efforts by local government to invest in a more extensive public transport network. Indeed, issues over travel - and particularly to and from venues located in non-city centre locations - were raised by stakeholders and detailed in our previous report (i.e. the city transport system was judged as not particularly adept at connecting north with south, and vice versa).[55] Future data-gathering exercises may - if they can also reach a broader range of demographics - reveal a larger percentage of public transport use (currently 30%) as projects such as the Birmingham Metro expansion and other transport infrastructure projects linked to the 2022 Commonwealth Games come to fruition.

That 15% of respondents walked to the events is encouraging from an environmental perspective and can likely be explained by several factors revealed by our venue mapping exercise. In the first instance, 67 of the 195 venues captured by our survey are located in the City Centre where there has been considerable residential development over the last two decades, including the construction of student residences linked to Aston and Birmingham City

Figure 14: Gig-goers survey response to the question about modes of events promotion (%)



Universities. Another likely factor is the large proportion of pub/bar venues in the city offering live music as part of an array of other activities, along with clusters of venues in particular suburbs (for example, Moseley and Kings Heath). Whilst these venues will draw customers from outside of their immediate community, many attendees will also come from the local area and - indeed - the availability of high-quality live music venues may contribute considerably to the attractiveness of a given area in terms of choices over where to live.

Rapid technological change

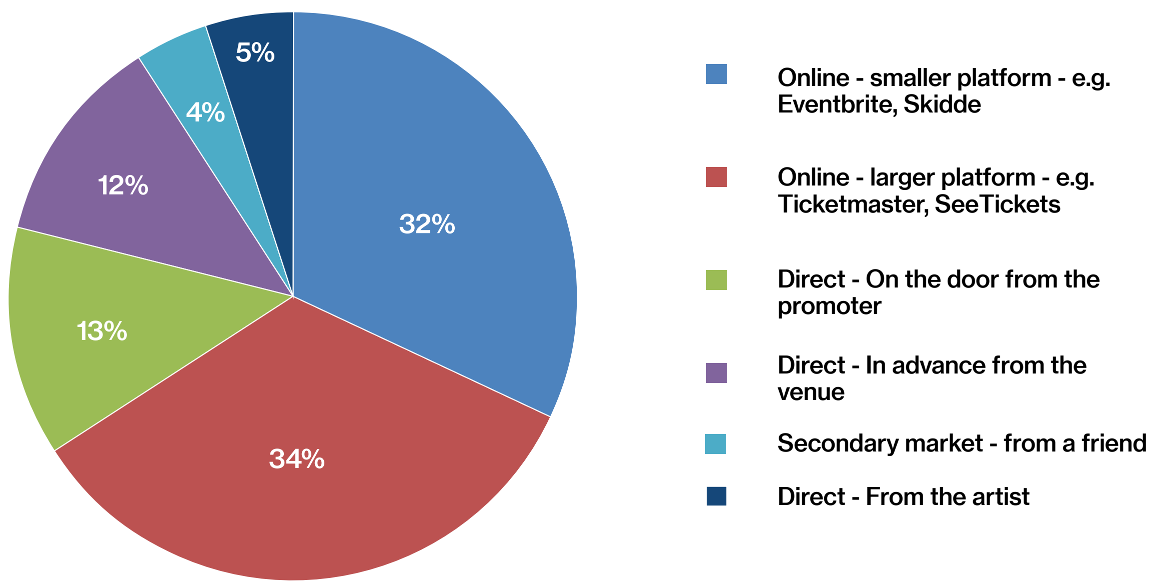
Looking at survey responses in regard to the relationship between live music and technology reveals the extent to which digital, online and data-derived services and platforms play a role in cultural and business environments of live music.[56] Figure 14 below reveals that there is a diverse range of ways in which gig-goers find out about the shows they attend, although it is clearly dominated by online channels.

61% of respondents reported that they heard about the last show they attended using an online channel (28% from Social Media, 22% from the artist's website or email list, 11% from the venue's own website). A further 13% of respondents reported that they discovered a particular show through word of mouth, and it is reasonable to assume that a not-insignificant amount of those conversations occurred via online channels - for example, friends mentioning or sharing details of a particular show via channels such as Facebook, WhatsApp and so on. Given the observations above, regarding the age-range of respondents and the comparative under-representation of respondents under the age of 30, it seems likely that the importance of online channels and digital services may indeed be an under-estimation. Nevertheless these figures demonstrate the centrality of digital systems in live music discovery and business activity and suggest that attention needs to be paid to training and issues of data literacy for existing stakeholders (and those in the pipeline) so that the sector can make the most of the opportunities (and mitigate against the issues) presented by these emerging channels.

The importance of local, offline activities of promoters should not be under-stated, however. 10% of respondents report discovering shows through posters and flyers (6%), venues brochures (3%) and the student press (1%). Given that our data shows that 15% of respondents travel to shows on foot - and are thus likely to live in the same community as a venue - this kind of offline promotion clearly has value and may represent a significant portion of the core community that sustains venues and shows. Similarly, the use of local listings (6%) speaks to the enduring importance to promoters of customers from within the city. Attention should be paid, then, to the manner in which a rounded communications strategy for promoters – both on and off-line – can facilitate sustainability.

The importance of online channels in terms of promotion is reflected also in how live music attendees purchase tickets for events.[57] 66% of tickets were purchased via online ticket retailers, almost evenly split between larger retailers such as Ticketmaster (34%) and smaller equivalents such as Skiddle (32%). As with social media and similar channels in terms of promotion, online ticket retailers have become an important element in the live music landscape. Many of these retailers - and in particular those such as Eventbrite and Skiddle - have lowered technical and economic barriers

Figure 15: Gig-goers survey response to the question about modes of purchasing tickets for the events (%)



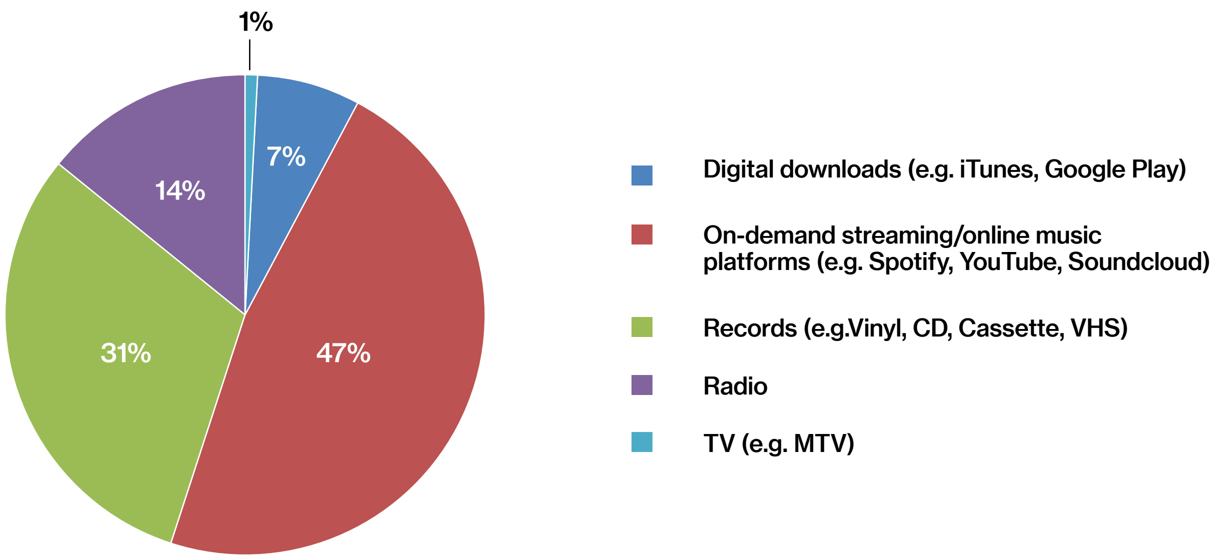
to selling concert tickets online, in most cases handling payments and data transactions that would have previously been prohibitively expensive for independent venues and promoters to set up. Relatedly, because such systems are data-derived and can help organise potential audiences around recommendation principles, they now form part of the promotion cycle. As with observations regarding the importance of data literacy training we made in terms of the promotion cycle, the same can be said of the sales cycle. A healthy live music ecology in the city will require promoters to keep abreast of changes in the technological landscape over the coming years so that they can harness online systems in the best way possible.

However, the importance of 'walk ups' - i.e. gig-goers who purchase tickets immediately before a show – should also not be under-stated. 13% of respondents reported purchasing tickets in this way. Given that margins for live music shows are often extremely tight, the increase in sales represented by the 13% here could in many cases to hold the balance between a show being a financial success or otherwise. Once again, the importance of gig-goers living in the same or nearby communities is highlighted, since the 13% of respondents buying tickets in this way, along with the 12% who purchase tickets in advance from the venues, are more likely to live close by - or within reasonable distance of - the venue concerned. This suggests that although online channels for promotion and sales represent the lion's share of activity and should form key elements of training and other activities related to sustainability, it is not to say that they represent the full picture, and - indeed - an attention to (hyper)local communities and how they may be reached is fundamental, and may even hold the balance between the breaking even or otherwise for an event.

Finally, and in relation to how regular concert-goers consume music outside of live events, we can once again observe the growing primacy of digital, online systems. 47% of respondents predominantly consume music through on-demand streaming platforms such as Spotify, YouTube and Soundcloud. We can observe here the wider trend of streaming overtaking earlier digital mechanisms such as downloads - making up only 7% of consumption - and, indeed, pre-digital forms such as TV (1%) and Radio (14%). It is the figure of 31% related to physical formats that is perhaps of greater interest to musicians operating in Birmingham, however, particularly given ongoing debates around the relatively poor return musicians and rights holders derive from streaming platforms.[58]

That regular gig-goers responding to our survey should produce such a comparatively high engagement with physical formats is not surprising. Given that these respondents identify as regular attendees of live music events, it is a reasonable assumption that they are likely to be more heavily invested in music generally (as a hobby, as a cultural activity, as a social event with friends, etc.) than the rest of the population. It therefore follows that along with spending their disposable income on live music tickets, they are also more likely to spend disposable income on music itself. Clearly, musicians and labels operating in the live music arena have the opportunity to derive additional income from this segment of population, through making physical formats (and merchandise) available at shows. Given also the high level of engagement with artists online channels amongst this sample, as shown earlier in this section, making such products available for sale online may also be advantageous and the management of such activity should be enfolded into thinking regarding sustainability.

Figure 16: Gig-goers survey response to the question about modes of music consumption (%)



Concluding remarks

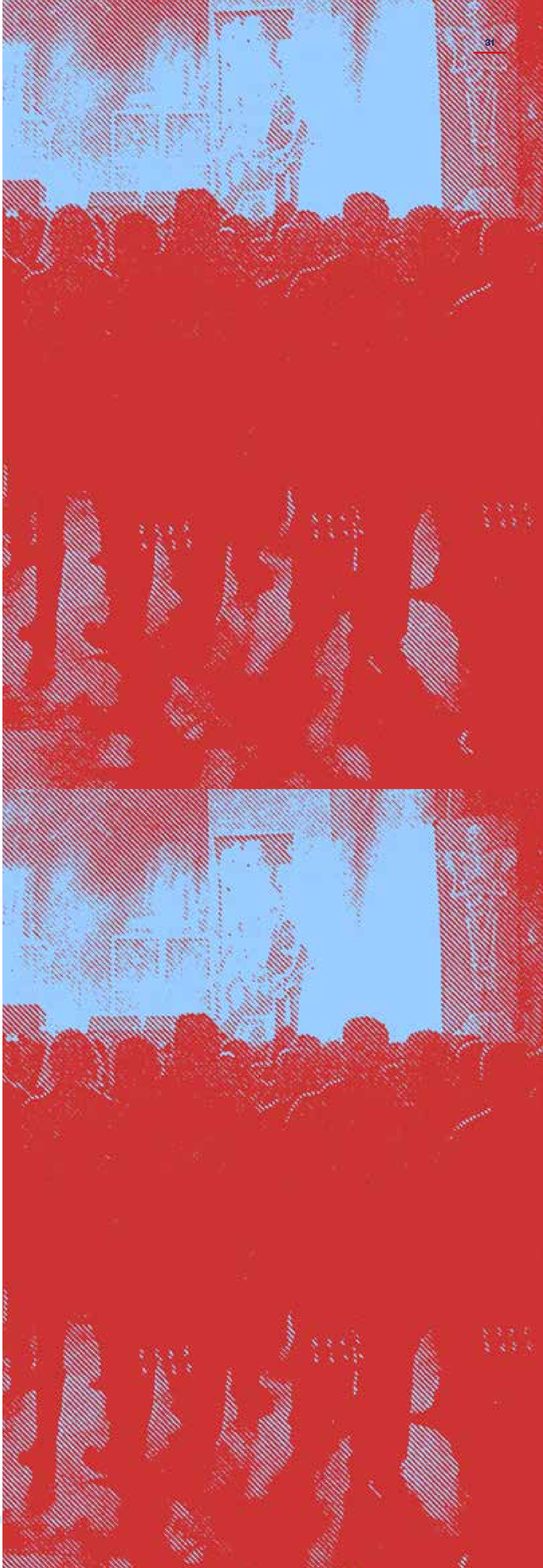
Although we acknowledge - once again - that the data underpinning this section cannot be described as a fully representative sample of Birmingham's citizens, and point also to the inherent problems of conducting live music research activity during a global pandemic that saw much of the activities under consideration closed off, the indicative results presented in this section nevertheless provided the impetus for further exploration of Birmingham's live music ecology. In particular, the importance of venues to local communities, the willingness of regular gig-goers to buck wider trends around music consumption, and an intriguing mix of digital and offline methods in the promotion of live music activity, are all worthy of further exploration. These provide a contextual window into the world of the live music activity as it occurs on the ground in Birmingham. In the following section, we explore how the conditions in which that activity occurs may change as a result of regulation and policy occurring at international, national and regional levels, as we continue to build our picture of the live music ecology of Birmingham.

Recommendations

RECOMMENDATION (v): Figures demonstrate the centrality of digital systems in live music discourse and business activity, and suggest that attention be paid to training and issues of data literacy for existing stakeholders (and those in the pipeline) so that the sector can make the most of the opportunities (and mitigate against the issues) presented through these emerging channels.

RECOMMENDATION (vi): A healthy live music ecology in any city will require promoters to keep abreast of changes in the technological landscape over the coming years so that they can harness online systems in the best way possible. However, offline still has a role. Attention should be paid, then, to the manner in which a rounded, on- and off-line communications strategy for promoters and venues can enable sustainability.

RECOMMENDATION (vii): For researchers looking into the study of live music, we recommend that, as much as possible, efforts need to be made to reach wider populations in data gathering exercises. Our survey sample represents a particular, self-identifying group of active gig-goers, but it does not reflect the profile of the city population as a whole (especially when looking into under-representation in the sample of BAME residents). It is therefore important that a more fully encompassing measurement process would help to better define the ecology.



53. Buttigieg, B., Cantillon, Z., Baker, S. Eds. (2019) *#Sounds of our Town. The Birmingham Edition.* https://acf72f70-710a-40b9-92db-5b7934011262.filesusr.com/ugd/8a61d6_004867ff143d471a9daa8df986ac1c44.pdf [Accessed: 4 January 2021]

54. Wall, T. (2008) 'Making money out of music: the role of music and radio in regional economic development'. *BOX papers,* 1:07, pp. 25.

55. For more detailed elaboration of the issues see: Rozbicka P., Hamilton C., Behr A., Correa P., Davies L.J. (2019) *Birmingham Live Music and Brexit: Report I.* Birmingham, UK: Birmingham Live Music Project/Aston University/Birmingham City University.

56. cf: Hamilton, C. (2019). Popular music, digital technologies and data analysis: New methods and questions. *Convergence,* 25:2, 225–240

57. In addition, musicians when asked about the way they predominantly distribute their music, 55% of respondents reported the importance of live music, with digital platforms, on-demand streaming and recorded music having an almost equal share of the remainder (10-13% each; MS, Q11).

58. See, for instance: Sweney, M. (2020) 'Nadine Shah: 'I can't pay the rent on unfair music streaming revenues', *The Guardian* 24 November. Available at: https://www.theguardian.com/business/2020/nov/24/nadine-shah-i-cant-pay-the-rent-on-unfair-music-streaming-revenues [Accessed: 8 November 2021]

And musicians' testimony to the Parliamentary inquiry into the economics of streaming: Digital, Culture, Media and Sport Committee (2021) *Economics of music streaming: Second Report of Session 2021–22.* London: House of Commons. Available at: https://committees.parliament.uk/publications/6739/documents/72525/default/

Section 2 – International/national/ regional regulations

In this section, we explore various elements of regulatory activity - at national/international and local levels - and examine how they impact upon Birmingham's live music ecology. Beginning with the implications of Brexit, the various case studies are presented together in this section to demonstrate how different and often unrelated local, national and international regulatory changes can coalesce in terms of their overall impact on local live music ecologies, where the effects of one regulatory change may compound another, exposing both fault-lines and opportunities.

changes in a globalised music industry brought about by a large-scale policy shift such as Brexit.

Our earlier work revealed a number of issues that are very specific to the local level, but that can be easily extrapolated to a national level.[61] On a practical level, the issue of disruption to just-in-time supply chains remains a major concern. Festivals and large-scale performances are a particularly acute case of the logistical issues surrounding touring acts, and disruptions and delays at the UK and EU borders may create lost opportunities. Given also that the

Ever since the 2016 EU Referendum, there has been considerable uncertainty about the potential costs and benefits of Brexit to the live music industry

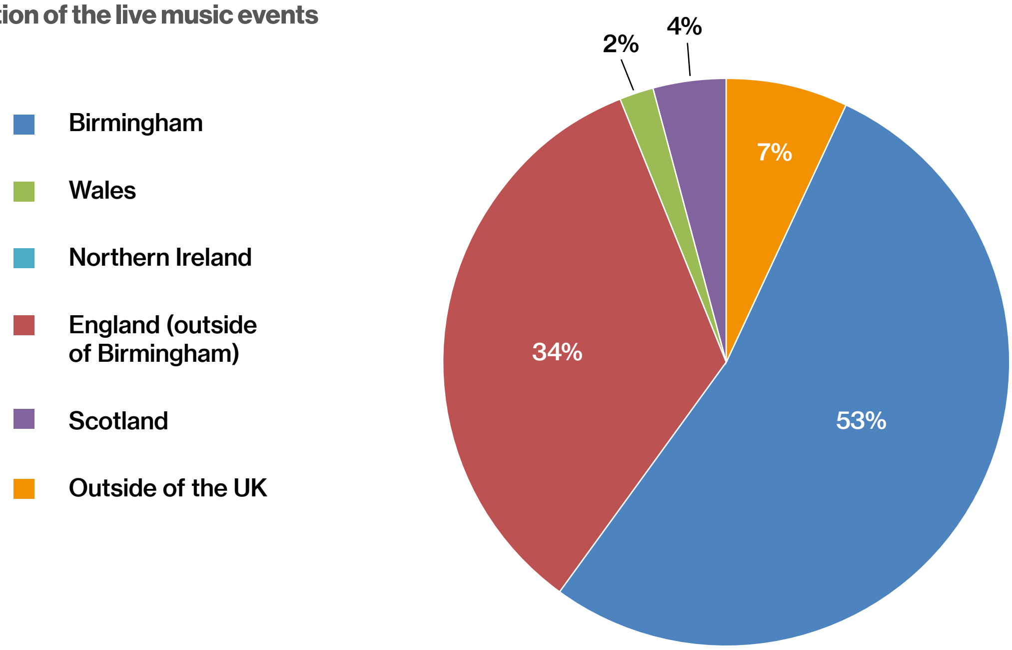
International and national level case study: Brexit

Ever since the 2016 EU Referendum, there has been considerable uncertainty about the potential costs and benefits of Brexit to the live music industry. The main considerations to date have included provisions around touring activity, work permits, visa regimes, and a drop in consumer confidence.[59] Even past the date of Brexit itself, there are still a number of issues which are unresolved at the time of writing (e.g. travel visas for musicians).[60] In this case study, we focus on a review of the situation from the perspective of Birmingham's live music industry. We aim to detail the broader national and sectoral perspective and include an assessment of the localised consequences of

UK has a shortage of warehouse spaces,[62] previously handled by the move to just-in time supply chains, the costs of storing items delayed by disruptions to just-in-time mechanisms are increasing.

Relatedly, the future of production companies (i.e. companies handling matters related to lighting, staging, and tour management) are at risk. These companies are major employers for both younger people receiving training and as providers of employment opportunities in the sector for skilled professionals such as sound and light engineers already in work. As the UK has often been a staging post for international acts touring the EU, changes to visa and work permit regulations directly impact those companies, potentially meaning they could no longer be

Figure 17: Gig-goers survey response to the question about the primary location of the live music events they last attended (%)



competitive against companies located in Ireland and other EU countries.In 2017, the West Midlands region was home to three major companies operating in this part of the live music sector: MCL Create (B38 8SE), SEE Audio: West Midlands (B98 9PA), and Cloud One Group Ltd (B7 4EE). Currently, only two remain operational.

There are also concerns over the recruitment of skilled employees post-Brexit. 29% of West Midlands businesses linked with the creative industries (including the music industries) employ non-UK nationals.[63] Relatedly, new restrictions on employment for EU nationals in the UK (and in particular the income cap)[64] greatly reduces the available

pool of low-skilled employees and most early to mid-career specialists. Given also that the average annual income of 72.73% of musicians responding to our survey is reported as being below £24,000 (MS, Q47) these factors combined may also have an impact in terms of decreasing levels of diversity within the live music scene.

On a more subjective level, a large worry relates to reputational damage to the UK caused by Brexit, felt in terms of impact on the musicians willing to travel to the UK, and overseas visitors who contribute to music tourism. At stake is a pre-Covid £252 million revenue in the West Midlands alone. [65] Combined, the toxic rhetoric around Brexit and the increased costs and administrative barriers to touring the UK, may lead to a decrease in the number of tourists visiting the UK specifically to see musical acts. This would impact not only live music but also cultural, touristic and service-related businesses. The potential harm also operates in the opposite direction. While Birmingham gig-goers responding to our survey predominantly visit gigs in Birmingham (53%) or England (34%), some of them also venture further afield, with 7% attending gigs outside the UK (Figure 17; AS, Q24). Thus, attempts to maintain free and continuous access to both the UK and EU for musicians should be made in order to maintain and grow existing levels of tourism and associated career and cultural experiences.

Related to that reputational damage, a concern over 'cultural pushback' - the long-term 'cultural effects' of Brexit - is in evidence from our consultations with stakeholders. In short, if the UK is perceived to be more inward-looking, British acts may get fewer opportunities to perform overseas, and vice versa. This is particularly pertinent for musicians responding to our survey, 65% having performed abroad pre-Covid19 (MS, Q18), with EU countries prominent in the list of locations – here, musicians either performed as a main act (68.4%) or as a part of a showcase festival (26.3%). Crucial here also is that income is generated outside of Birmingham and the UK, and predominantly in the EU.

Many acts will disappear as there will be more frustration from it being harder to tour - apart from bands made up of upper middle class kids who have a pot of money to fall back on. (MS, Q40; Anon.)

Linked here are the increased costs and difficulty regarding administrative processes, both for acts traveling to the EU, and for UK venues and promoters hosting EU acts. One of the short-term concerns is a drift towards more homogenised events, creating a less diverse scene through a decrease in cultural exchange.

All of the above is further exacerbated by a perceived lack of reliable information, or at least a single source for the live music industry from which to gain knowledge about the implications of Brexit. This remains one of the main concerns both for audiences and musicians (AS, Q35 & MS, Q41). 45% of musician respondents were not confident, somewhat unconfident or not at all confident that they are prepared to deal with the changes associated with Brexit (MS, Q42).

There are some positive developments, however. There is a recognition of various non-state actors who playing a crucial role as information hubs, including the Music Venue Trust and Musicians' Union. But overall a perceived lack of attention to the music industries in comparison to industries, such as agriculture, manufacturing and pharmaceuticals, in the Brexit negotiations and beyond, continues to be a large concern.[66]

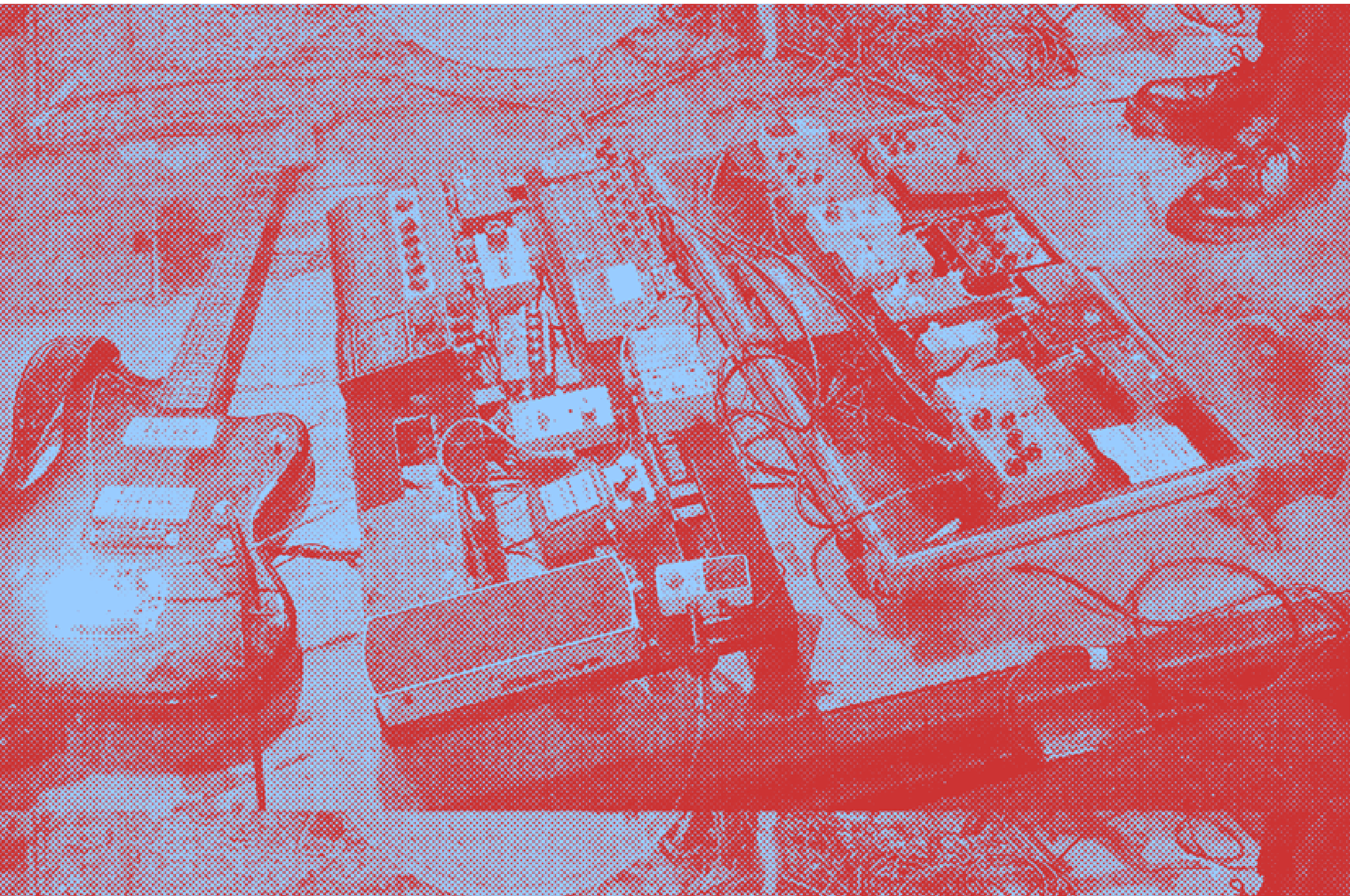
Against the negative impact of Brexit, there are some potential opportunities (AS,Q35). There is a chance, for instance, that local acts will be able to make up for the loss of international acts and thus build their touring income in the UK, offering more employment opportunities for UK based musicians if international artists visas become problematic to obtain.

'We await to see the outcome of Brexit on the music scene and artists coming from abroad. I suppose the potential restrictions of EU travel could see more UK bands touring more regularly in the UK with more gig goers staying in the UK rather than abroad. Whether this will be create more culturally diverse UK artists to emerge we will have to wait and see.' (AS, Q35: Anon.)

'I see challenges in regarding the logistics of musicians traveling abroad to and from Europe (bad bureaucratic behaviour is inevitable) but it may result in stimulation of Artists as difficulty is often preceding innovation.' (AS, Q35: Anon.)

'Further, Brexit - combined with the challenge of Covid-19 - may stimulate the live music industry through a surge in innovation based on the strength and depth of the entrepreneurial spirit within the creative culture industry (Michael Kill, CEO of NTIA, Interview on 18th September 2020).

From the points gathered above, however, it is evident that the costs of Brexit for the live music will probably outweigh the benefits. A national-level decision, followed by a series of international agreements, may have a potentially devastating impact on the UK music industry, and this will be felt at local levels. While data and information from Birmingham has been used here, other cities and their live music ecologies will likely be similarly impacted, with negative consequences for the livelihoods of UK musicians, venues, and the cultural outlooks of the cities and regions concerned.



Regional and local case studies: City planning regime, Birmingham Clean Air Zone, and Commonwealth Games 2022

City Planning Regime

The Town and Country Planning Act of 1947[67] stated that no property could be built without the agreement of the local authority. A substantial change to the Act was announced in 2020 which saw those planning permissions revised,[68] with decisions over what (and what does not) get built being removed from local/regional city council control and given over to Westminster-governed 'Zoning Commissions'. The Housing Secretary announced that the changes will speed up development processes by making them less likely to be held up by 'special interest' groups. While this statement mostly referred to developers' associations and lobby groups, it seems likely too to have an impact on heritage protection groups, night-time economy planning, and other local voices, including stakeholders in the city's live music ecology.[69]

Each individual application is now considered in terms of 'zone-systems' of planning, with land divided into three zones: growth, protection, and renewal. Anyone applying for planning permission to develop apartments/flats, offices or shops on land zoned for growth will automatically be granted planning permission, while on land zoned for renewal purposes planning permissions will be granted in principle, subject to checks performed by Government-appointed officers.[70] Further, the changes will also introduce an increase in the cost of land (for landowners and builders) as the Government will take a larger share of any uplift in land value to finance infrastructure adjacent to developments. Local authorities have until 2024 to designate areas according to the three zone systems.

It appears very likely that most of Birmingham City Centre, if it is not already, will be designated as the 'growth' zone. This will mean that new housing and office developments will be prioritised, putting in jeopardy some of the city's centrally located venues, with independent and grassroots venues particularly at risk. Venues of this type rarely own the land or property on which they are located, tending instead to operate on a rent or lease basis. Such arrangements are reviewed periodically and can lead to contracts not being renewed by property owners (see for example: Hammer and Anvil, B4 7LL). Further, and relevant in regard to new zoning, venues of this kind have been effectively erased to make way for new developments via Compulsory Purchase Orders (e.g. Eagle and Tun, B5 5RH, for the expansion of HS2). The issue, too, of the general costs associated with running venues in the city centre was mentioned a number of times by our interviewees (Interviews: 31 Mar 2020, 2 Apr 2020, 20 Oct 2020).

A particularly salient example is the Digbeth area, located in the south-east of the city centre. Historically, Digbeth has been a (light)industrialised zone, but more recently many of the area's disused spaces, warehouses and factories have been taken over by creative industries businesses and organisations initially attracted by cheap rents for large spaces in a central location with very few residential developments that may lead to issues such as noise complaints. As such, and over the last 20 years, the area has become home to a number of live music venues or businesses that deliver live music as part of their wider offer. See for example: Digbeth Dining Club (B9 4AG), the Night Owl (B9 4AG), or Dead Wax (B9 4ED). However, the area has also hosted several venues which could not sustain their existence due to increasing costs (e.g. the original Alfie Birds, B9 4AA; the Irish Centre, which moved to Kings Heath). The most recent developments that are linked to the increasing cost of rents/leasing in Digbeth are associated with the nearby development of HS2 and Birmingham Curzon Station along with several housing developments attracted to the area by that major infrastructure project.[71]

Conversely, 38% of musicians performing in Birmingham reported living outside of the B-postcode area, with a further 16% living outside of the B1-48 central area. Thus, while the city is a central hub for their performance (49.15% work primarily in or around Birmingham, with a further 16.84% working in the city and beyond; MS, Q7), it is not where they seek or can afford accommodation. There is therefore a risk that the city may gradually become (if it has not already) too expensive for the main stakeholders in the live music ecologies.

This particular case-study is one example of how national level regulatory change has an impact on local live music ecologies. Here, we focused on the Planning Act and its potential impact on the city centre and Digbeth area further linking it with the affordability of accommodation for musicians, and venue staff. Even those documents with the potential to support existing venues (such as the elements of the National Planning Policy Framework which support the use of the Agent of Change principle) have broad remits – such as increasing housing stock. Music venues are often not considered up front, or centrally, in such policy frameworks. National regulatory changes can coalesce in terms of their overall impact on local live music ecologies, where, in addition, the impact of one regulatory change may compound another, exposing fault lines.

Clean Air Zone

Another example of how regulation and policy may impact Birmingham's live music industry in the coming years is the Birmingham Clear Air Zone (CAZ). This came into force in spring 2021. The scheme is aimed at improving air quality in the city centre and will charge people for driving high-polluting vehicles in and through the city. Vehicles falling outside of accepted levels include petrol vehicles produced before 2006, and diesel cars produced before 2015. The Zone itself covers all roads inside the A450 Middleway ring road, which includes not only the city centre itself but also parts of Bordesley, Newtown, Digbeth, Highgate, Ladywood

Figure 18: Birmingham Live Music Map and Clear Air Zone

and the Jewellery Quarter.[72] Within this zone are many of the city's centrally located music venues (60, Figure 18).

Our survey demonstrates that the majority of musicians regularly performing in Birmingham travel to the venues by car or van (75%; MS, Q17). The regulation includes some exceptions that may apply here, but these are time limited: those registered as residents of the CAZ (Clean Air Zone) receive a 2-year exemption; those traveling into the CAZ for work receive a 1-year exemption. However, as our survey data suggests, the vast majority of musicians performing in the city live outside of the B1-48 postcode, meaning the first exemption is not an option. Further, as DVLA and Department for Transport data show, drivers in the UK tend to keep their vehicles for longer; in 2019, 19% of vehicles owned were more than 13 years old.[73] A possible outcome of the CAZ, then, is that a large proportion of touring and local musicians (and support vehicles) entering Birmingham city centre will have to increase their touring budgets to account for CAZ fees (£8 per day). These costs (in addition to parking, fuel and other costs associated with transport) will either be absorbed by musicians or else passed on to promoters, and may be particularly impactful for local musicians commanding lower fees and who regularly perform in the city centre.

Here, we see an example of how local regulatory change (CAZ), which is very well intended and in many respects a necessary development, will have an unexpected impact on the live music ecology. While the charge of £8 a day is maybe not a shocking amount, expenses like that stack up, adding cost to overall budgets. If a tour is going through Birmingham and London that can amount easily amount to ~£33 (including London's congestion charge and Ultra Low Emission Zone charge). Thus, while initially a small expense, it is part of a wider group of local (and sometimes regional) charges causing cumulative expenses for musicians, tour managers, promoters, and agents. As indicated above, some of those charges can be avoided (or postponed), but the overall point is that more information and guidance is needed. Regulatory measures that are important – vital even – in a wider context can still intersect with other costs to create pressures for musical practitioners.

2022 Commonwealth Games

In 2022, Birmingham will be hosting the Commonwealth Games between 28th July and 8th August. It will be the biggest sporting event ever held in the West Midlands and is being billed as a unique opportunity to showcase Birmingham to the rest of the world as a place to live, work, study and conduct business. Based on data for Glasgow's 2014 Commonwealth Games, the income from the event is expected to be more than £740m.74 The games will primarily take place in the following locations within the B-postcode area:

- Alexandra Stadium (B42 2LR)
- Birmingham Arena (B1 2AA)
- Edgbaston Stadium (B5 7QU)
- NEC (including sport and village venues; B40 1NT)
- Sandwell Aquatics Centre (B67 7HE)
- Smithfield (B5 4SG)
- Sutton Park (B73 6BU)
- University of Birmingham (including sport and village venues, B15 2TT).

From the perspective of live music venues captured during our preparation of the Birmingham Live Music Map, the two locations most likely to be disrupted are those around Birmingham Arena and Smithfield, both located in the city centre. Particularly salient here is that the Birmingham Commonwealth Games Act 2020 provides for advertising restrictions in the vicinity of Games locations. The main focus of this is the protection of rights for commercial sponsors by 'ensuring that businesses who are not official sponsors, or who have not contributed towards the costs of hosting the Games, cannot exploit the opportunity of the Games to expose their brands to spectators at the event and/or watching the event being broadcasted' (DCMS 2020, 2.2).[75] Further, the Birmingham Commonwealth Games Act 2020 provides for restrictions on 'Games location trading' in and around Games locations and at specified times. The restrictions cover, for example, providing public entertainment for gain or reward (including street entertainers and buskers). Exceptions to those advertising and trading restrictions include: adverts displayed inside buildings or on enclosed land, and temporary adverts relating to any local event or activity not being promoted or carried out for commercial purposes.

The language of the Act is not very clear with regard to the promotion of live music events within the area or vicinity of Games' locations, but there are potential ramifications for businesses operating in the live music space. It is not clear, for example, if live music events taking place at nearby venues would classify as 'providing public entertainment', but it may be the case that such events will need to be free in order to be eligible for the exceptions discussed above. There is a clear risk, then, that the language of the Act and/or a lack of explicit exceptions for the live music performances may be prohibitive, potentially decreasing the chances of venues, promoters and musicians in the live music ecology of the city from fully benefiting from the Games that are taking place in their vicinity.

This particular example brings our argument even closer to the conclusion on the impact of unrelated regulatory regimes on live music ecologies.There are a number of issues that affect local live music ecologies. These can be managed, but wider discussion of their impact, and information sharing, is key to informing all relevant stakeholders about the consequences of decisions being taken.

Concluding Remarks

Looking at the impact of regulation on performers and audiences, we can see further how some of the specific regulatory issues described above are connected. Above we have indicated, for example, the issue of property costs in the city centre in terms of how they impact upon venues. To add to this, 30% of respondents to our musicians' survey stated that a lack of affordable accommodation in terms of property purchase has a negative impact on their career, with 18.3% stating the same about a lack of affordable places to rent (MS, Q25). While licensing is not a major issue (only ~18% identify it as having an impact), planning and property development was indicated as having a negative impact by 38.4% (MS, Q24). Other regulations and restrictions have additional impact. Noise complaints are indicated as problematic by 31.7% of respondents who lack a proper rehearsal space (MS, Q24), which itself is not in an abundance in the B-postcode. 44.9% also indicated that parking and loading issues were problematic, which will be further affected by the introduction of the Clean Air Zone. Relatedly, many add that better transport links would improve their live music experiences (57.6%; AS, Q20).

Overall, both musicians and gig-goers responding to the survey felt insufficiently supported by local authorities and agencies. 61.7% of musicians stated that a lack of support from local authorities and agencies has a negative or strongly negative impact on their career (MS, Q26), with 40% also stating that a lack of local industry infrastructure was detrimental. 64.1% of the respondents to the audience survey believed that a centrally-managed information point about the local live music would most likely encourage them to see more live music in Birmingham (AS, Q20).

As the previous sections depict, the music industries are a sector where Britain excels, with a pre-Covid £5.8 billion contribution to the UK economy in 2019.[76] This serves to highlight the need for extra attention to be paid to the impact of various indirect regulations on that sector of the economy. Recent government investments to help the creative culture sector through the Covid19 highlight the long and difficult relationship between regulators and the arts.[77] However, it is often difficult to disentangle creative industries policy from other areas. Many of the policies most salient for cultural and creative activity do not always refer directly to it, revealing tensions between how the policies have been defined (or rather misconceived) and how they have a direct impact on music venue infrastructures and a workforce heavily characterized by self-employment.[78] As this section has demonstrated, the combination of international, national and local regulatory change has a range of implications for the live music ecology of Birmingham. These changes are likely also to impact on the live music ecologies of other urban centres.

Clearly, these implications require a joined-up response that considers both local and broader pictures if they are to produce and maintain sustainable local ecologies, and it seems likely that initiatives around the production and dissemination of reliable, up-to-date information and guidance from trusted sources will be key. Regulatory change can be adequately managed if the correct agencies can work together, and may even present hitherto unforeseen opportunities. In the following section, however, we deal with regulatory change brought about by an entirely different, and wholly unexpected set of circumstances. We will show how the Covid-19 represented a shock to the system of live music, and heightened many of the tensions, barriers already explored in this report.

Recommendations

RECOMMENDATION (viii): We recommend a formalisation of impact assessment processes relevant to the live music industry at local and regional levels. Encompassing here an understanding of live music ecosystem as a part of broader night-time economy (including a vast network of venue's supply chains and gig-goers spend around the venues), we encourage the development and implementation of the Night Time Industry Impact Assessment that would be applicable to any new policies/strategies and planning decisions taken at the local and regional level.

RECOMMENDATION (ix): The Development of materials building on existing resources that can assist policy-makers and regulators in their understanding of the realities of live music ecologies.

59. See for example: Creative Industries Federation (2016) Brexit Report: *The impact of leaving the EU on the UK's arts, creative industries and cultural education – and what should be done.* https://www.creativeindustriesfederation.com/sites/default/files/2017-05/Brexit%20Report%20web.pdf [Accessed: 15 Mar 2020]

House of Commons Digital, Culture, Media and Sport Committee (2018) *The potential impact of Brexit on the creative industries, tourism and the digital single market Second Report of Session 2017–19.* https://publications.parliament.uk/pa/cm201719/cmselect/cmcumeds/365/365.pdf [Accessed 21 Oct 2020]

60. A governmental statement that short-term, visa free work permits will be allowed for musicians met with a sceptical response from musicians' and industry organisations, which noted that these referred to pre-existing arrangements and that the statement was "misleading".

22 October 2021, Letter to Minister of State for Digital, Culture, Media and Sport
from Incorporated Society of Musicians, Musicians' Union, Featured Artists Coalition, Association of Independent Music, Music Managers' Forum. Available at: https://www.ism.org/images/images/20-Countries-letter-FINAL.pdf [Accessed: 1 November 2021]

A letter from the House of Lords European Affairs Committee (19th October 2021) was similarly sceptical. Available at: https://committees.parliament.uk/publications/7510/documents/79296/default/ [Accessed: 1 November 2021]

61. For more detailed elaboration of the issues see: Rozbicka P., Hamilton C., Behr A., Correa P., Davies L.J. (2019) *Birmingham Live Music and Brexit: Report I.* Birmingham, UK: Birmingham Live Music Project/Aston University/Birmingham City University

62. Butler, S. (2019) 'UK warehouse space nears capacity as firms stockpile for Brexit', *The Guardian,* January 21. Available at: https://www.theguardian.com/politics/2019/jan/21/uk-warehouse-space-nears-capacity-firms-stockpile-for-brexit [Accessed: 11 January 2021]

63. Bakhshi, H., Spilsbury, M. (2019) *The Migrant and Skills Needs of Creative Businesses in the United Kingdom. Findings from the January 2018 Creative Industries Council Migration and Skills Survey.* London: Creative Industries Policy and Evidence Centre, p.22. Available at: https://pec.ac.uk/assets/images/The-Migrant-and-Skills-Needs-of-Creative-Businesses-in-the-United-Kingdom-REPORT.pdf [Accessed: 11 January 2021]

64. GOV.UK (14 Oct 2020), *Guidance: Employing EU citizens in the UK.* Available at: https://www.gov.uk/guidance/employing-eu-citizens-in-the-uk [Accessed: 11 January 2021]

65. UK Music (2020) *Music by Numbers: 2020.* Available at: https://www.ukmusic.org/wp-content/uploads/2020/11/Music-by-Numbers-2020.pdf [Accessed: 11 Jan 2021]

66. Daly, R. NME (2021) 'UK government responds to claims they rejected EU's "visa-free" deal for touring musicians', *NME* 10 January. Available at: https://www.nme.com/news/music/uk-government-reportedly-rejected-visa-free-deal-touring-musicians-eu-2852655 [Accessed: 11 January 2021]

67. Legislation.gov.uk (1947) 'Town and Country Planning Act', https://www.legislation.gov.uk/ukpga/1947/51/enacted [Accessed: 3 Febuary 2021]

68. BBC (2020) 'Boris Johnson defends 'long overdue' planning overhaul in England', *BBC News website,* 20 August, Available at: https://www.bbc.co.uk/news/uk-53669432 [Accessed: 3 February 2021]

69. Maidment, J. (2020) 'Government faces massive backlash over proposals to speed up planning process as 2,000 councillors - including 350 Tories - write to Housing Secretary Robert Jenrick to warn they will not accept 'loss of local control' over new developments', *Mail Online* 10 December 2020. Available at: https://www.dailymail.co.uk/news/article-9038553/Government-faces-backlash-proposals-speed-planning-process.html [Accessed: 3 February 2021]

70. The Bull Sheets (Autumn 2020) 'Nimbyism in Birmingham is Dead - Long Live planning permission Change'

71. *BirminghamLive* (27 Jul 2020) '1,000 new Digbeth homes opposite Custard Factory which sparked petition fury now set to be decided'. Available at: https://www.birminghammail.co.uk/news/midlands-news/1000-new-digbeth-homes-opposite-18671157 [Accessed: 3 February 2021]

72. Birmingham City Council (2020) 'A Clean Air Zone for Birmingham'. Available at: https://www.birmingham.gov.uk/info/20076/pollution/1763/a_clean_air_zone_for_birmingham/3 [Accessed: 8 January 2021]

73. Hull, R. (2020) 'We're keeping our cars for longer than ever', *This Is Money* website, 17 September. Available at: https://www.thisismoney.co.uk/money/cars/article-8739771/Britons-keeping-cars-longer-says-new-report.html [Accessed: 8 Jan 2021]

74. DCMS (2020) *Government consultation - proposed exceptions to the advertising and trading restrictions under the Birmingham Commonwealth Games Act 2020.* Available at: https://www.gov.uk/government/consultations/exceptions-to-birmingham-2022-advertising-and-trading-restrictions [Accessed 8 Jan 2021].

75. See above

76. UK Music (2020) *Music by numbers: 2020.* Available at: https://www.ukmusic.org/wp-content/uploads/2020/11/Music-by-Numbers-2020.pdf [Accessed: 2 February 2021]

77. Behr, A. (2020) 'The State and the Arts', *The New European,* 16 July.

78. Across both the city and the country, over 70% of professionals are self-employed, with further 36.36% in Birmingham and 25% in the UK (as a whole) semi-professionals also being self-employed.

Section 3 – Covid-19

In this section, we highlight and review how Covid-19 has impacted various live music stakeholders at national, local and hyper-local levels. While we identify a lot of issues resulting from the application of macro-policies on a micro scale (which we frame below as a top-down approach), we also see a number of creative solutions that helped sustain the live music industry through the pandemic (i.e. a bottom-up approach). Operating between these ends of the spectrum of responses to Covid-19, we also explore those emerging from the middle ground occupied by various non-state organisations which have provided assistance to the sector during the pandemic. Alongside exploring these top-down, bottom-up and middle ground approaches, we also explore some of the creative responses and attempts to restore audience confidence that have occurred within the sector, illustrated with examples from Birmingham. While we use Birmingham as an explanatory case study, we argue that the effect of social restrictions, and responses to them, are also relevant elsewhere.

Birmingham's roadmap to live music - tier system revisited (top-down approach)

As established above (see: 'Birmingham - the second city'), live music is a significant contributor to the West Midlands economy. Live music venues are a central element to that and constitute an important node in a vast network of supply chains. With the UK PM Boris Johnson's order of 20th March 2020 to put the country into lockdown, the live music experience effectively stopped. This was followed by months in various configurations of regional tiered systems allowing some live events to take place, before eventually the UK returned to full lockdown on 30th December 2020. During the summer months of 2020, various roadmaps for reopening live music venues were considered.

The closest to achieving fruition, albeit one severely criticised, was a five-step roadmap published on 25th June 2020.[79] While Stages 1 and 2 focused on rehearsal and recording spaces, Stage 3 (initiated on 11th July) started the gradual process of reopening live events to the public. Initially, venues were allowed to stage events outdoors (Stage 3), with the expectation that Stages 4 and 5 would allow gig-goers inside venues pending social distancing and various other safety restrictions in line with COVID-19 Secure guidelines.[80] 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, they were to become the main staging location.

Looking at data from the BLMP map[81] and the impact of the COVID Guidelines around tiered easing of lockdown restrictions, moving from Stages 1 and 2 to Stage 3 meant that 47% of venues in the city could feasibly have put on live gigs using their outdoor spaces (Figure 19). Roughly half of those would have needed 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 the live gigs on due to projected costs/benefits calculations. Examples of events taking place included larger gatherings in the parking area of the NEC (B40 1NT) and the backyard outdoor garden of the DeadWax (B9 4ED).

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 a venue's 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[82] applied exclusively to professionals, leaving semi-professional and amateur bands (more than 46% musicians performing in Birmingham; MS, Q12) subject to the Guidelines on meeting people outside their households,[83] 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.

The city's live music capacity of 98,000 (see section: 'Birmingham - the second city') suddenly dropped during the summer months of 2020 by ~75%, and at best would operate at ~66% capacity. This had clear implications for ticket prices, the availability of events across the city, and indeed the economic viability of shows – 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.

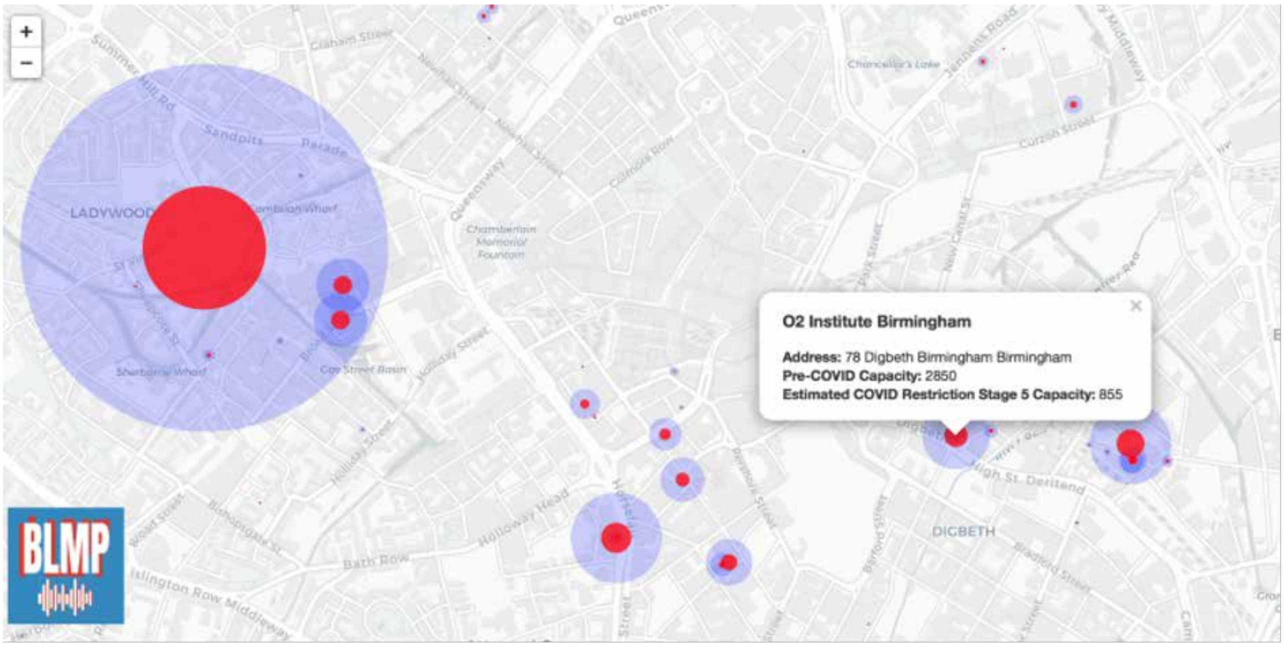


Figure 19: Pre and Post-Covid live music venue capacities in Birmingham, UK

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

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 response to the government's Cultural Recovery Fund (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 on 5th July 2020,[84] the Culture Recovery Fund (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".[85] The size of the package was certainly historic (it represented approximately 20% of the entire DCMS spend in 2016-17, for example), as was the context. 'Culture' has usually been defined very broadly and understandings of 'heritage' and what constitutes cultural activity play 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, was 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 depend on them.

The Culture Recovery Fund (Grants Programme) opened for initial applications on 10th August 2020, followed by a second round on 21st 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 COVID-19, but were at imminent risk of failure' (Arts Council 2020, CRF Key Information[86]). The first tranche of funding available 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 31st March 2021 as a result of the pandemic. The eligibility criteria specified that cultural organizations (whether for profit or not for profit) should be based in England, 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.[87] The scheme received widespread public support from a range of cultural organizations (eg. Music Venue Trust,[88] Theatres Trust[89]), who also noted how the crisis had unlocked funding in an unprecedented fashion.

Across the three rounds (released on 12th, 17th and 24th October, 2020), 48 Birmingham-based organisations received a total of £15 million (see Figure 20 below for a detailed breakdown of this). 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 centrally based organisations (i.e. those in postcodes B1-B48) 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.[92] The 'music' discipline in particular included: brass bands; choral; classical; contemporary popular; experimental; folk; jazz; world/diasporic music; and other.

Despite the practical difficulties in reconciling the CRF and BLMP data and definitions,[93] an analysis across the three CRF funding rounds (Figure 21) 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-Covid. 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, 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-Covid 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 ACE 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 Symphony Hall being an exception and defined as a concert hall ('concert hall/auditorium, dedicated music venue, mainly seated gigs'). A much smaller proportion of funding landed in the hands of places traditionally more closely linked with live music events associated with popular musical forms.[94] . As Arts Council England (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. This is reflected in Figure 21 with a lower portion of the total funds awarded to those venues and organizations.

If we focus only on the CRF,[95] there is an apparent disparity between the amounts granted to organizations which are dedicated to music as their main business (Figure 21 column 5) and those with a broader focus (column 3). 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 a 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

Figure 20: Culture Recovery Fund Grants for Birmingham and West Midlands (no distinction on type of the venue) [90 91]

CRF Phase/Round	Birmingham	No. of organizations	% of total	West Midlands	No. of organizations	% of total
Round 1	5,285,771	28	2.05	16,950,243	95	6.58
Round 2	1,004,322	16	1.31	5,954,645	54	7.77
Round 3	8,787,448	4	11.70	17,394,783	8	23.16
Total	15,077,541	48	3.68	40,299,671	157	9.85

B-postcode before the 2020 COVID lockdowns (or 158 as specified to CRF mapping), only an estimated 10% received funding in the scheme to that point (6% in round 1, 2.5% in round 2, and 1.9% in round 3).

The CRF grants were 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. Some of them are harder to reach through established frameworks, and gathering information about them and where they fit into the broader picture will be a stepping-stone to the longer strategic route.

Development and engagement of stake-holders (middle ground)

The COVID 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,

Figure 21: Venues supported by the Culture Recovery Fund (B1-B48)

CRF Phase/Round	Birmingham	No. of organizations	% of total	West Midlands	No. of organizations	% of total
Round 1	Moseley Park (Mostly Jazz)	Music	Outgreen	No	50000	0.51
Round 2	Moseley Park (Moseley Folk)	Music	Outgreen	No	50000	0.51
Round 2	The Kitchen Garden Café	Music	Rest	No	59136	0.60
Round 1	Suki10c	Music	Smallclub	Yes	73517	0.75
Round 1	Hare and Hounds	Music	Medvenue	Yes	75000	0.77
Round 2	The Castle & Falcon	Music	Smallvenue	Yes	79000	0.81
Round 2	The Bull's Head	Music	Bar	No	100338	1.03
Round 1	The Night Owl	Music	Smallvenue	Yes	128000	1.31
Round 1	The Jam House	Music	Smallvenue	Yes	146760	1.50
Round 1	Nightingale	Combined Arts	Largeclub	Yes	265000	2.72
Round 1	Birmingham The Mill	Music	Largeclub	Yes	283000	2.90
Round 1	Midlands Art Centre	Visual Arts	Arts	No	680668	6.98
Round 1	Symphony Hall	Music	Arts	Yes	843000	8.64
Round 3	Birmingham Repertory Theatre (REP)	Theatre	Theatre	No	1380023	14.16
Round 3	Birmingham Town Hall	Music	Concert	Yes	253467	26.00
Round 3	Birmingham Hippodrome	Theatre	Theatre	No	300000	30.77
Total					974811	100

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[96] and UK Amateur Touring Crew[97], and Musicians Support During Coronavirus Crisis[98]. 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,[99] 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 Covid-19. Organisations such as the Arts Council, Musicians' Union, Music Venue Trust, 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.[100] The NTIA campaigned heavily and liaised with DCMS with the aim of raising awareness of the plight of the night time economy, and called for the inclusion of live and dance music in debates around potential support (Interview, 20 Sep 2020). 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. Others initiatives, and in particular those undertaken by CRU, aimed at building a more equitable and inclusive sector (Interview, 20 Sep 20).

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 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; Interview, 20 Oct 2020).

'I am concerned about the effects the pandemic will have on artists who are already struggling. However I am somewhat hopeful that smaller grassroots organisations will be nimble enough to fight the changes and will do what larger organisation cannot, i.e. build a more equitable music ecology with new exciting leaders.'

Creative live music responses[101]

In the 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.[102]

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. Examples include: Marie's Crisis NY[103], the Piano Bar providing daily sing-alongs of show tunes, or the online dancefloors of DJs, such as Diplo's 'Corona World Tour'.[104] 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[105] and attracted 60,000 viewers in its first hour. In Norway, Verfet Online Music Festival[106] featured the country's top artists and attracted sponsored from the country's national bank, Sparebanken. In Birmingham itself, the Swingamajig festival organisation[107] hosted an online quarantine 'Lockdown' Party to replace its festival in May. Classical music organizations too stepped up and shared their concert archives online (eg. Berlin Philharmonic's 'Digital Concert Hall'[108], Budapest Festival Orchestra's 'Quarantine Stories' [109]). 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. As one interviewee noted during our research:

'We are reminded of the birth of music downloads and the sense of uncertainty the music industry faced at the loss of a primary revenue stream. Once again, we will see a bloom of ideas and approaches to the provision of music, the monetization of these communities of interest and a shift in the way we see value in music' (Anon; Interview: 26 Feb 2020).

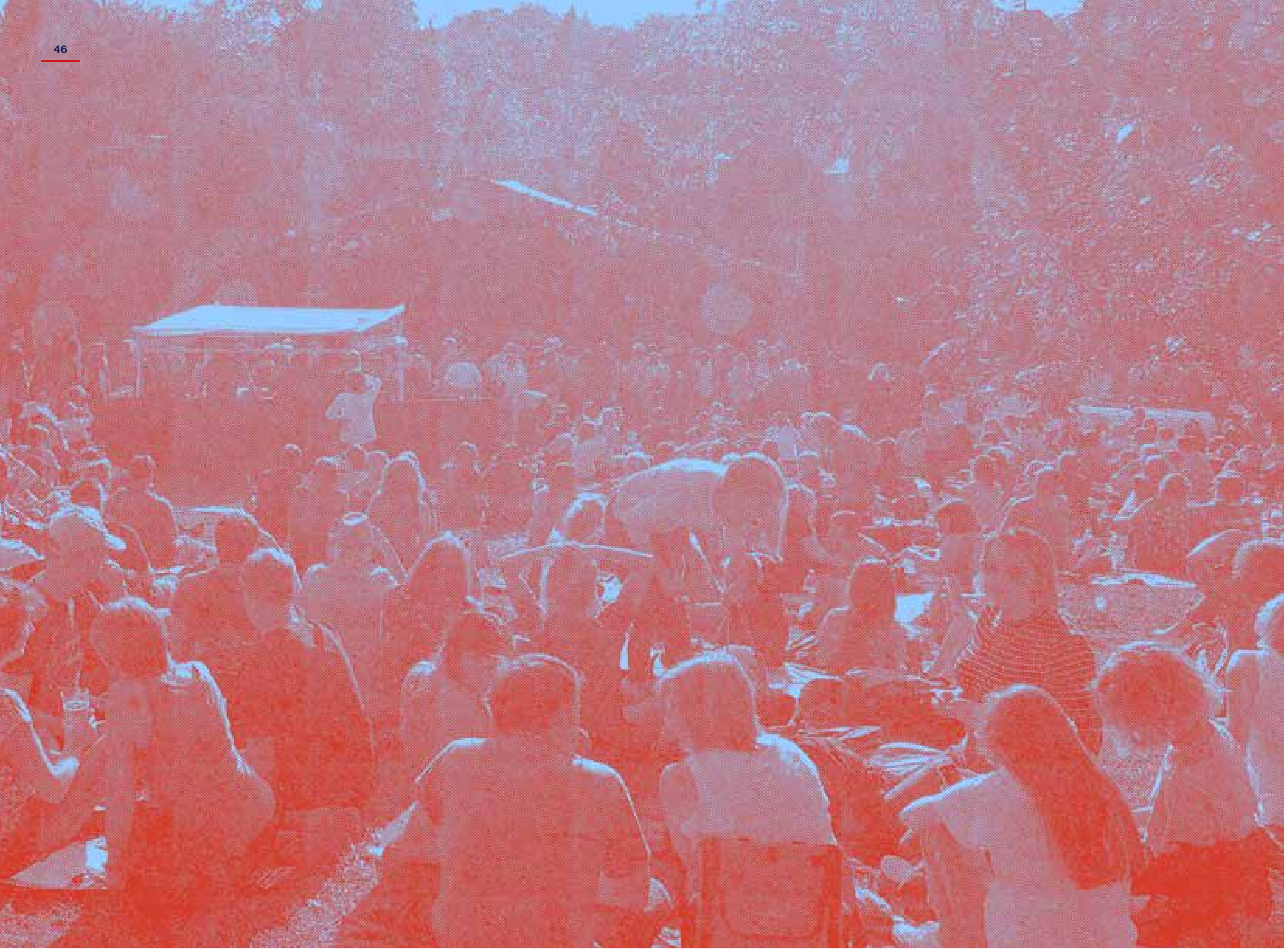
The response to Covid-19 also brought examples of direct-to-fan engagement by individual artists, bands and venues, with physical, in-place interaction being temporarily replaced by the live streaming on Instagram. Examples here include Chris Martin from Coldplay,[110] P!nk,[111] and Tim Burgess from the Charlatans,[112] but this extended also to local acts and venues. The Night Owl (B9 4AG) offered livestream DJ sessions, and Pirate Studios (B9 4EG) gave over its Instagram channel to producer Nutty P, who provided tutorials on production. These particular approaches place the streamer in the centre of activity, and have been referred to as a 'third-wave' of live streaming[113] Online engagement spread further still, with artists establishing an 'access-all-areas'-style online presence through meet and greet pages such as Looped and Chatalyze, some charging a fee.[114]

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 the near future.[115] During the initial stages of lockdown, some 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, Oct 2020).

Rebuilding audience confidence

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 (AS, Q37), and although 64% of that group kept the ticket in the hope of a rescheduled event, 15% sought refunds and 4% kept the ticket, but did not intend to attend the rescheduled event. These responses to the survey suggest an increased cautiousness about attending events in the future (AS, Q38), with questions about a realistic approach to maintaining health and safety and the relative benefits of social-distanced concerts.

When asked what local councils and authorities could do to make live events feel safer in the future (AS, Q39), the vast majority of gig-goers responded that more initiative could be taken by authorities to support local venues. That support could come in the form of financial support (to maintain venues through the pandemic), better information (on the implementation of social distancing rules), or even a less restrictive licensing and regulatory regime, which could help venues deliver outdoor events. Similarly, when the focus of the question was shifted towards venues themselves (AS, Q40), gig-goers were keen to see venues provide information on how social distancing rules were being implemented, underpinned by reassurance that venues had engaged with relevant specialists, such as health and safety professionals and associations. The above suggests that rebuilding audience confidence may not be easy, but it is clear that reliable information and robust communications strategies will be key. Many stakeholders have accepted that the current situation has longer-term transformative implications. Suggestions that 'vaccination passports' might be required for access to live music and nightclubs, for instance, received a mixed response, and was the source of some debate about whether such restrictions could be



applied equitably across different types of venue or across musical and other kinds of public events. The abandonment of the policy was met with relief by stakeholders like the Night-time Industry Association and Music Venue Trust, who pointed out that venues were already working towards providing Covid-secure environments as far as possible and raised a concern that "double vaccination certification as a sole requirement of entry was ... unlikely to achieve improved safety above and beyond those measures already in place and highly likely to create a two-tier night-time economy which divided venues and customers".[116]

Concluding remarks

From balcony-based sing-alongs in Italy, to megastar global broadcasts, music was embedded in our response to the disruption wrought by Covid-19.[117] As the pandemic and its effects continue to unfold, music continues 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, but it seems clear that long term responses need a broader focus to support the live music ecology. Here, the role of various non-state stakeholders will be crucial in supporting musicians and venues through the pandemic and beyond. The examples discussed in this section show progress on several fronts as new ways are explored for performing music and communicating its social, cultural and economic benefits.

Recommendations

RECOMMENDATION (x): We recommend that local authorities create information hubs to support local venues 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, which support the activities of the Liverpool City Region Music Board (an independent, sector-led board), as well as help with submission of applications to the support funds and other future funding initiatives.

RECOMMENDATION (xi): We recommend that venues, while implementing their return to regular activities, start building awareness campaigns about social distancing and other health and safety solutions. While relatively low cost, this will help to build audience confidence and will make more patrons willing to return to the venues. Taking into account the reliance of gig-goers on digital technologies (see section: Socio-cultural changes), the advice is to use social media to conduct those campaigns.

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89. Wood, A. (2020) 'Culture Recovery Fund: full list of organisations receiving money in first round of grants' *WhatsOnStage.* 12 October. Available at: https://www.whatsonstage.com/london-theatre/news/culture-recovery-fund-full-list-covid-grants_52574.html [Accessed: 26 January 2021]

90. Includes all CRF categories: dance, theatre, combined art and museums.

91. The geographical definition of Birmingham in this instance is based on data provided by the CRF and Arts Council England, based on the postcodes supplied by applicants to the CRF. Based on the information available (as of 24th October 2020), we assumed that all organisations identified as being based in Birmingham supplied B-postcodes as their geographical location: This included postcodes B1-B48, covering the city centre and surrounding areas. Other B-postcode areas, such as Redditch (B97-98) and Sandwell (B64-B71) have been included in the CRF database separately.

92. Arts Council England (2020) Culture Recovery Fund Grants: FAQ'. Available at: https://www.artscouncil.org.uk/funding/culture-recovery-fund-grants#section-4 [Accessed: 15 October 2021]

93. When matched with the BLMP's data and definition of live music venues (see: Methodology section) an issue arises in terms of attempting to match the CRF and BLMP data. The project definition (which sought 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 went beyond that of the CRF, including some of the organisations marked as 'Theatre' and/or 'Combined arts' (see Figure 22). The BLMP categorisation of a live music venue focused 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, disqualified some such places, 'music' not being their primary role/business focus (for example, pubs and bars that are predominant live music venues in the city), but still applied to outdoor spaces, such as parks, where events such as music festivals may take place.

94. Examples here include: 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).

95. Other initiatives supporting grassroots music venues through the pandemic include Emergency Grassroots Music Fund (preceding CRF), Capital Kickstart , ACE Emergency Response Fund (with almost £100,000 awarded to live music venues and festivals), and National Lottery Project Grants that included a Grassroots Live Music strand.

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97. https://www.facebook.com/groups/781866721851206 [Accessed: 28 January 2021]

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101. A special thank you note here to Asya Draganova (@asyadraganova) and Beth Hogan (@Bethory1) for helping in data and information collection on this topic.

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103. https://www.facebook.com/groups/120608734673633/ [Accessed: 10 April 2020]

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BLMP Webpage:
https://livemusicresearch.org/birmingham-live-music-project/

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