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Live Music Ecologies in the UK – A local perspective in the context of the pandemic

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The authors are collaborators on **the Birmingham Live Music Project (BLMP)**, which seeks to explore how the live music 'ecology' of Birmingham (and beyond) is constituted, along with the challenges and opportunities arising from its regulatory environment. Specifically, it examines how those challenges at local level intersect with, and are sometimes affected by, national level concerns, notably the Covid-19 pandemic and responses to it.

Abstract

In 2019, the UK's live music sector was valued at over £1.3 billion. After almost a decade of strong growth the sector helped push the UK music's overall GVA from £3.5 billion in 2012 to £5.8 billion in 2019, the outbreak of the global pandemic brought it to a near standstill. This paper explores, through a local lens and a focus on Birmingham, the challenges stakeholders across the live music sector have faced in recent years.

There are a number of issues to consider in the broader process of recovering from the pandemic shutdown. Live music remains heavily impacted by the developing situation around Brexit, where further reciprocal engagement to facilitate touring will be productive. There is also a need for consideration of the long-term effects of national policies around matters like planning on local, small-scale cultural operators (grassroots venues and others).

Measures to tackle Covid-19 also obviously affected venues in Birmingham, as elsewhere. The main argument here focuses on recognising the importance of the live music ecosystem to the broader night-time economy, and the value of communication channels between musical stakeholders, local authorities and regional – as well as national – policymakers. The role of existing music representative bodies, and the emergence of new ones, was an important factor in the necessary work of trying to align top-down approaches, like the disbursement of national funds, and grassroots initiatives.

The authors conclude that a healthy live music ecology needs policymakers to take account of factors like planning and development, the spread of venues in different neighbourhoods – as well as within the city as a whole – and the effect of national policy on local provision. This points towards an important role for representative music bodies and emerging regional music boards in establishing impact assessments and serving as a forum for the development of a strategic approach that considers the musical economy in local, regional and national policies.

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1. Introduction

This discussion paper examines, through a local lens, the socio-cultural and economic challenges faced by the UK's live music sector, valued at over £1.3 billion in 2019.[1] Alongside economic impact, it discusses the mechanics of culture and the social costs of change for businesses and artists in a rapidly evolving UK musical landscape. It considers the challenges stakeholders in the live music sector face and, when available, coping mechanisms for practitioners and businesses in live music culture. The paper focuses on key aspects arising from the 'ecological' nature of local live music and is a summary portrait of a larger report, where the points indicated here are elaborated in more detail.[2]

Our approach, and focus on the local, is informed by the concept of the live music 'ecology'. This derives from the idea that the immediate locality where the music is performed encompasses a plethora of interrelated actors and organizations that constitute the music ecologies (i.e. live music venues, bars, recording studios, music managers, graphic designers, equipment hire companies, food and drinks suppliers, which create clusters of small businesses and supply chains).[3] Importantly, not all of these actors are necessarily musical in nature. The actions and decisions of local policymakers, for instance, have a significant bearing on local live provision.[4] A healthy live music ecology depends on the interplay of venues of different kinds, and size, but also their relationships with surrounding contexts (planning, licensing, health and safety, transport and the like). An 'ecological' model of local live music also attempts to combine elements of the material and infrastructural with consideration of the necessary negotiations with those who are not directly part of the musical milieu. Whilst exploring local ecologies remains important for safeguarding music making in cities and towns, it is also part of – and informs – the national picture. Exploring the ramifications of sustaining and supporting a live music industry on a local level can contribute to conversations on a broader scale. Here, we use Birmingham and its live music ecology as an exploratory case study.

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[1] UK Music (2020) *Music by Numbers 2020*. London: UK Music https://www.ukmusic.org/wp-content/uploads/2020/11/Music-by-Numbers-2020.pdf

[2] Rozbicka, P., Hamilton, C. and Behr, A. (2022) *The UK Live Music Industry in a post-2019 era: A Globalised local perspective*. Birmingham: Aston University/Birmingham City University/Newcastle University.

[3] 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.

[4] Behr, A., Brennan, M., Cloonan, M., Frith, S. and Webster, E. (2016), 'Live Concert Performance: An Ecological Approach', *Rock Music Studies*, 3 (1), pp. 5-23. DOI: 10.1080/19401159.2015.1125633

Birmingham's music scenes have 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 vibrant popular music and culture. The city's musical heritage includes acts with international reach, such as Black Sabbath, Duran Duran, The Beat, Steel Pulse, Judas Priest, and the Electric Light Orchestra. It has also played a role in the establishment of the bhangra genre[5] and is home to the City of Birmingham Symphony Orchestra. While our main focus is local, then, it is difficult to completely disentangle local music making from its broader contexts.

The music industries at large are heavily characterised by the interplay of local activity and the globalised operations of transnational businesses like major record labels and global promotion companies like Live Nation. Likewise, while 'music' is often conceived of, and referred to, as a singular industry *en bloc,* it is possible to identify a number of different sub-sections – recording, publishing, artist management and concert promotion, for instance – that while they are interconnected, both culturally and economically, have distinct priorities and interests – in other words, a set of industries.[6] Our focus here is primarily live music, but it warrants mentioning that live music, as both a cultural and a business concern, does not work in a silo. Indeed, even the live music sector is highly differentiated, covering a range of activities from local acts playing in pubs, to global touring stars, and both independent and corporate festivals. Music businesses, and live music specifically, have long been characterised by fluidity in response to technological and cultural change including the shift from physical to digital products for recordings over the course of the 21st Century, the growth of a musical economy built upon streaming services, and increasing opportunities for the streaming of live events by individual acts and event organisers. Indeed, while touring has long been a mainstay of musical activity, digital platforms now allow acts to reach international audiences from their home territories. Fan networks communicating online and the borderless movement of digital content adds the potential for a transnational dimension to local music. Local music, in other words can reach beyond its geographical boundaries.

Stakeholders such as musicians, venue operators, production crew, producers and even bar staff (all localised in specific areas) are economically tied into a set of business practices that extend far beyond their locality. There is also a longer-term context in which live music has become an increasingly important source of revenue for artists since the turn of the twenty-first century as recording revenues declined sharply in the face of digital downloads in the 1990s and

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[5] Khabra, G. (2014). 'Music in the Margins? Popular Music Heritage and British Bhangra Music', *International Journal of Heritage Studies*, 20(3), pp. 345-355. 10.1080/13527258.2012.758652
[6] For an account of these relationships see Williamson, J. and Cloonan, M. (2007) 'Rethinking the music industry', *Popular Music* 26(3), pp.305-322

2000s before a recovery led by the rise of streaming services which, nevertheless, are an unreliable source of income for a large proportion of artists.

Live music revenues overtook those from recordings in 2008[7] according to reporting by PRS for Music (the UK's copyright collection society for musicians). Similarly, annual reports by UK Music (the representative body of the UK's commercial music producers) regularly indicated that live music was the largest revenue generator.[8] A survey of musicians as part of the UK Live Music Census of 2017 also suggested that the bulk of income for professional musicians came from live music (43%, compared to 3% for recordings, with other revenue sources including 26% from teaching, 4% from session work, 4% from composition and 7% from non-musical activity).[9] More recently, an overview of studies provided in a report for the Intellectual Property Office also indicates the significance of live performance revenues for music creators.[10] Prior to the wholesale collapse in live revenues in 2020 as a result of the pandemic – a decline of around 90% – the UK's live sector had achieved what UK Music described as "almost a decade of exceptional growth which powered the music industry's overall GVA from £3.5 billion in 2012 to £5.8 billion in 2019".[11] As such, the health of UK music overall is entwined with, and in no small measure dependent upon, the vitality of live performance activity and local live music ecologies.

In the sections that follow we reflect upon interrelated sets of issues that speak to live music in the UK. We start with an exploration of locality – and Birmingham's music ecology – and suggest that small venues are important financial, cultural and community assets that need to be protected, sustained and supported. Our understanding of small venues includes dedicated grassroots music venues which are vital in themselves as accessible rungs on the ladder for entry into live music, as training grounds for musicians and live music workers like sound engineers, and as sites of aesthetic experimentation. It also includes some pubs

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[7] Page, W., & Carey, C. (2009). *Adding up the music industry for 2008*. London: PRS for Music. http://prsformusic.com/creators/news/research/Documents/Will%20Page%20and%20Chris%20Carey%20(2009)%20Adding %20Up%20The%20Music%20Industry%20for%202008.pdf]

[8] UK Music's *Measuring Music 2017* put live revenues at £1bn, with recorded at £640m in 2016. UK Music (2017) *Measuring Music 2017*. London: UK Music. https://www.ukmusic.org/news/measuring-music-2017/

[9] Number of respondents for this survey question = 527. Webster *et al* (2018) *Valuing Live Music: The UK Live Music Census 2017 Report*, Glasgow/Newcastle/Turku, University of Glasgow/University of Newcastle/University of Turku, p.20. http://uklivemusiccensus.org/wp-content/uploads/2018/03/UK-Live-Music-Census-2017-full-report.pdf

[10] Hesmondhalgh, D., Osborne, R., Sun, H. and Barr, K. (2021) *Music Creators' Earnings in the Digital Era*, Newport: Intellectual Property Office, p.34 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1020133/music-creators-earnings-report.pdf

[11] UK Music (2021) *This Is Music 2021*. London: UK Music, p.23 https://www.ukmusic.org/wp-content/uploads/2021/10/This-is-Music-2021-v2.pdf

and bars that are less specifically or solely oriented around music but which, nevertheless, serve as spaces for formative musical experiences and entry points to playing in front of audiences, as well as revenue sources for working musicians. This is an approach wherein the interrelation of different categories of venue is seen to shape elements of the ecology as a whole.[12]

We then move on to look at the impact of ***regulatory activity***. The interconnectedness of the local with its broader contexts means that there are implications at local level for decisions taken further afield (Brexit, for example, or national planning frameworks and their capacity to affect the use of buildings surrounding venues). Local policy, however, is also key to the sustainability or otherwise of a live music ecology and we point to its wider implications and potential hidden costs for local venues and musicians. Local regulatory activity, much of which impacts on music making, would often benefit from a prior assessment of its potential effects.

In the final section, we explore the ***impact of COVID-19 on the live music ecology.*** We note the drop in the city's live music capacity by 2/3 during the summer months of 2020 caused by lockdowns. The implementation of the various tier systems proposed by the Government led to questions about the economic viability of live events in a more general sense. We look into support for venues during the pandemic and discuss how government's and funders' understandings of the live music ecology have an effect on who has access to the various kinds of support. Venues' and artists' experiments with livestreaming and other online initiatives were positive actions, but no clear model emerged and questions about the sustainability of those solutions – or, at least, the need for further exploration and training – arise. Given how important digital activity is, further training initiatives would be useful in service of harnessing these opportunities in the future. Communication between local authorities, music industry organisations alongside further and higher education institutions would be a useful starting point. The growth of regional music boards and City Region Music Boards in the last five years is an opportunity to explore the potential for such collaborations.

[12] Behr, A., Brennan, M., Cloonan, M., Frith, S. and Webster, E. (2016) 'Live Concert Performance: An Ecological Approach', *Rock Music Studies*, 3(1), pp. 5-23. DOI: 10.1080/19401159.2015.1125633

2. Locality and Birmingham's music ecology

Birmingham is a vibrant city with a long, rich history of producing and consuming popular music and culture. The urban cultural economy of Birmingham and its surroundings has a set of specific cultural characteristics, with over 40% of the population being under the age of 25,[13] a growing inflow of new residents from London,[14] and a rising profile as the host of the Commonwealth Games in 2022. These factors bring jobs and 'music tourism' into the city, which is home to two of the largest venues in England: the Birmingham Arena (capacity 15,800) and the NEC Genting Arena (capacity 15,600).

The urban cultural economy of Birmingham and its surroundings is particularly salient in bringing 'music tourism' and jobs into the city and the West Midlands region. UK Music estimates that music tourism brought 877,000 tourists (7% of the nation's music tourists) spending £252 million (5% of the entire UK music spend) to the West Midlands region in 2019 that generated 2.453 FTE jobs.[15]

The Birmingham Live Music Map produced as part of this research,[16] which at present includes 195 music venues across the whole B-postcode, and 156 within its epicentre (postcodes B1-B48), demonstrates that Birmingham has a wide variety of venue types, ranging from social and student clubs (around 14%), through medium-sized live music venues to arenas (Table 1, below).

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[13] UKPopulation.org (2019) Birmingham Population 2019. https://www.ukpopulation.org/birmingham-population/

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

[15] UK Music (2020) *Music by Numbers 2020*, London: UK Music. https://www.ukmusic.org/wp-content/uploads/2020/11/Music-by-Numbers-2020.pdf

[16] Birmingham Live Music Map, https://livemusicresearch.online/blmpv3/

Table 1 – Categories of venues in the Birmingham Music Map

Code	Description	No.	Percentage (%)
arena	Arena (5,000-20,000 capacity): large, covered, multi-purpose arena or conference centre	3	1.92
arts	Arts centre (200-2,000 capacity): multi-arts, multi-purpose venue	6	3.9
bar	Bar, pub with music (20-100 capacity): main focus is alcohol sales with occasional music	69	44.2
church	Church/place of worship: place of worship which hosts live music events beyond its regular services	2	1.3
concert	Concert hall/auditorium (200-3,000 capacity): dedicated music venue, mainly seated gigs	4	2.5
hotel	Hotel or function room	3	1.9
largeclub	Large nightclub (>500 capacity): dedicated nightclub, mainly for dancing	6	3.9
largemusic	Large music venue (651-5,000 capacity): dedicated music venue, mainly standing gigs	2	1.3
medvenue	Medium music venue (351-650 capacity): dedicated music venue, mainly standing gigs	2	1.3
other	Other (20-1,000 capacity): venues which are used for live music occasionally and do not fit into the above categories	6	3.9
outgreen	Outdoor (greenspace), e.g. parks used for festivals	4	2.5
rest	Restaurant/café with music (20-100 capacity): main focus is food with occasional music	11	7.1
smallclub	Small nightclub (<500 capacity): dedicated nightclub, mainly for dancing	1	0.6
smallvenue	Small music venue (<350 capacity): dedicated music venue, mainly standing gigs	8	5.1
social	Social club/community centre/village hall/sports hall: meeting place, generally formed around a common interest, occupation, activity or location	19	12.2
student	Student union/university building	3	1.9
theatre	Theatre/opera house (500-2,500 capacity): mainly theatre with some live music/opera	7	4.5
Total		156	100

Predominant within the ecology are pubs, bars and small venues (almost exactly half of the total), with a capacity below 400. Within these spaces, however, musical activity is not always predominant since the figure includes bars and restaurants that only occasionally host live music performances as well as those for whom it is a regular feature. This points towards some aspects of a local cultural ecology that are hard to capture. While those places are not *sensu stricto* live music venues (they may often, for instance, not have fixed live music infrastructure like a stage or built-in PA system), they still provide employment and platforms for local operatives that are relevant for the city's live music ecology.

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 – which have seen incomers with disposable income to support local businesses – 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 confirms what can be reasonably assumed as common, 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 higher income suburb in the far north of the city – has 22 venues (just over 11% 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% of its 14 venues are pubs and bars, and a further 29% 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 identified a 'north/south' divide in the city, with some perception of the north as something of a poor relation in terms of musical activity and opportunities.[17] Northern neighbourhoods such as Perry Barr and Aston, for example, have historically been amongst the poorer areas in the city. Two wards in Perry Barr are amongst the most deprived areas of the Birmingham (Index of Multiple Deprivation 2019).[18] While there are less well-off neighbourhoods than these, Druids Heath in the south for example, both Aston and Perry Barr are in closer proximity to the city centre – thus their comparative lack of venues is more visible feeding the perception of shortfall.[19] Data from the

[17] Comments by representative of the Birmingham Music Coalition at BLMP workshop (07.05.2019) and Jez Collins, founder of the Birmingham Music Archive, in interview (19.02.2021).
[18] Aston fares better here because it is closer to the city centre and is a host for Aston University and Aston Villa stadium and facilities at its edges, which elevates its scores.
[19] The issue is also somewhat compounded by a city transport system which makes it difficult to get from one end of the city to the other directly on public transport without changing. Routes go to the centre, but not across city, north to south.
Rozbicka P., Hamilton C., Behr A., Correa P., Davies L.J. (2019) *Birmingham Live Music and Brexit:*

mapping exercise suggests that there are comparable amounts of activity in the north and south, but 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 complement some of the more lauded venues of the city centre and southern suburbs would strengthen the overall musical offering of the city considerably. The point here is not that the local authority would necessarily directly subsidise the establishment of new venues. As welcome as that might be, its funding resources could also be deployed to support musical and music promotional activity more generally through its cultural, education and social provision in consultation with the West Midlands Music Board and local stakeholders. While this does involve deployment of resources, it could involve a long-term view. As Professor Simon Frith OBE has noted:

> One crucial aspect of a healthy local music ecology is that new entrants (with new ideas, constructing new audiences) should have the space and time to get established. This is where public funding and resources can be significant. What is unnecessary is for the state to act as a kind of ersatz music business – its role is to support entrepreneurs, not to be entrepreneurial.[20]

Considering the links between music venues and issues of regulation, it seems reasonable to posit that efforts need to be made to protect existing venues. This applies in both deprived areas as well as in more affluent areas, and those that are in transition. 'Gentrification' can be a double-edged sword. While it can bring in new residents with disposable income to support new businesses, changes to the character of the neighbourhood, particularly from new developments (e.g. housing or hotels), can make life more difficult for musical practitioners if they lead to increased noise complaints, or rising rents, which can

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Report I. Birmingham, UK: Birmingham Live Music Project/Aston University/Birmingham City University, p.19
https://publications.aston.ac.uk/id/eprint/43613/6/BLMP_report_1_.pdf
Birmingham City Council (2021) *Draft Birmingham Transport Plan Consultation Report June 2021*, p.26
https://www.birmingham.gov.uk/downloads/file/19954/draft_birmingham_transport_plan_-_consultation_report_june_2021

[20] Frith, S. (2013) 'The Social Value of Music (in the context of European regeneration policy): Keynote address to European Music Council Annual Forum in Glasgow on April 19 2013', *Live Music Exchange*.
https://livemusicexchange.org/blog/the-social-value-of-music-in-the-context-of-european-regeneration-policy-simon-frith/

make the area less affordable for creative practitioners.[21] 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.

This reinforces the significance of smaller spaces (bars and pubs, grassroots venues) within the overall urban live music ecology. Not only are those spaces predominant in the Birmingham venue map, but they are also well frequented by audiences, and a significant source of performance space for musicians. It is crucial to view those venues as important nodes of 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 the night-time spend (e.g. food and drinks purchased at the event/venue, but also outside the event/venue).

[21] Indeed, Richard Florida – who promoted the notion of creative industries regenerating post-industrial environments – rowed back somewhat from this position as the complexity of gentrification and rising property prices proved to be a mixed blessing.
Florida, R. (2013) 'More Losers than Winners in America's New Economic Geography.' *Citylab*, 30 Jan.

3. The interplay of regulatory activity and the live music ecology

It is worth noting that 'creative industries policies' do not operate in isolation, but in conjunction – and sometimes in tension – with policy in other areas. A corollary of this is that as Simon Frith, Martin Cloonan and John Williamson have put it, many significant policies for "for the making and unmaking of local music culture are not music policies at all."[22] From licensing, through education to planning, many non-music policies can have a direct impact on music venue infrastructures and a workforce heavily characterized by self-employment. Through the examples below, we argue that extra attention should be paid to the impact of various *indirect* regulations on the live music sector, locally, national and internationally.

One wide-ranging policy development that has been the source of some concern since 2016 is Brexit and its potential costs to live music practitioners and businesses. Considerations have included provisions around touring activity, work permits, visa regimes, and a drop in consumer confidence.[23] This is, of course, a developing rather than static situation. Key concerns have been the comparative lack of free movement and the additional burdens imposed on touring acts, both logistical and – relatedly – financial, as a consequence of artists having to deal with extra administrative matters in their business operations.[24] The need for extra applications for work permits and carnets, to move equipment and merchandise, is a case in point here.[25] There is, then,

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[22] Frith, S., Cloonan, M. and Williamson, J. (2009) 'On Music as a Creative Industry'. In: Pratt, A. and Jeffcut, P. (eds.) *Creativity and Innovation in the Culture Economy*. London: Routledge, p.83
[23] 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
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
[24] House of Lords (2021) *Impact of Brexit on UK musicians performing in the EU*, London: House of Lords Library.
https://lordslibrary.parliament.uk/impact-of-brexit-on-uk-musicians-performing-in-the-eu/
[25] Rozbicka, P., Behr, A. and Hamilton C. (2022) 'Brexit and the UK live music industry'. In: Homan, S. (ed.) *The Bloomsbury Handbook of Popular Music Policy*. New York: Bloomsbury Academic, p.324.
UK Music (2021) *This Is Music 2021*, p.30

frustration at the curtailment on touring activities as a feature of the UK's musical landscape.[26] A poll by UK Music found that "54% [of the public] feel the Government should be doing more to ensure musicians can work abroad post Brexit".[27] The point here is that, while the initial emphasis is on the international ramifications for musical acts and associated supporting businesses, these consequences are felt *locally* as well. Local live music ecologies, in other words, are not entirely distinct from one another, or their international regulatory contexts.

While the sentiments of musicians and workers are easier to track than exact effects on their work – Craig Stanley, Chair of the LIVE Touring Group cited 90% responding to a 2022 survey stating a negative effect[28] – there are some indications of the latter. An analysis of line-ups in three major European festivals from 2017-19, and then 2022, found a decline of 45% in British bands.[29] Granular details of artists from a given locale (such as Birmingham) who have missed touring opportunities, or opted not to pursue them, are likewise difficult to ascertain due to a lack of pre-existing benchmarks, the hidden nature of many such decisions, and the fact that almost all such activity ceased as a result of the pandemic. Individual examples do, though, give some indication of the additional complexity involved, for organisations of all types. For instance, the Chief Executive of the Association of British Orchestras described to the All Party Parliamentary Group on Music that a shift from the previous regime of free movement to tighter controls under the Trade and Co-operation agreement of 2020 meant that a £250,000 temperature and humidity controlled lorry could not be used in Europe due to its UK ownership.[30]

There is also, though, recent evidence of progress on this front, with the creation of a 'dual registration' system for specialist hauliers in the UK and in the EU to

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[26] Trendell, A. (2022), 'Brexit, one year on: Music industry remains frustrated at "clueless" government', *NME* 06 January.
https://www.nme.com/news/music/brexit-one-year-on-music-industry-remain-frustrated-at-clueless-government-3130861

[27] UK Music (2021) *This Is Music 2021*. London: UK Music, p.38
https://www.ukmusic.org/wp-content/uploads/2021/10/This-is-Music-2021-v2.pdf

[28] All Party Parliamentary Group on Music (2022), *Transcript APPG on Music Evidence Session 2 Barriers to Working in the EU for the UK Music Industry*, 7 February, p.15
https://www.ukmusic.org/wp-content/uploads/2022/07/O-7-Transcript-of-2nd-APPG-on-Music-Inquiry-Evidence-Session.pdf

[29] Gottfried, G. (2022) 'Analysis Finds 45% Drop In British Artist Bookings Post-Brexit', *Pollstar*, 8 September.
https://news.pollstar.com/2022/08/09/study-finds-45-drop-in-british-artist-bookings-post-brexit/

[30] All Party Parliamentary Group on Music (2022), *Transcript APPG on Music Evidence Session 2 Barriers to Working in the EU for the UK Music Industry*, 7 February, p.4
https://www.ukmusic.org/wp-content/uploads/2022/07/O-7-Transcript-of-2nd-APPG-on-Music-Inquiry-Evidence-Session.pdf

ease pressure on touring.[31] The ongoing work of parliamentarians (MPs), as well as industry representatives, also points to routes through regulatory headwinds. The All Party Parliamentary Group on Music's report of July 2022, for example, contains recommendations for improving the Trade and Co-operation Agreement to improve border force training, expand the number of checkpoints where carnets and Music Instrument Certificates can be checked, and reduce bureaucracy for live event transport and haulage.[32]

A number of these issues also connect businesses at the local level to these broader systems.[33] A preliminary workshop on our project with local practitioners, for instance, revealed concerns about the potential effects on equipment storage and increased difficulty in recruiting skilled and semi-skilled workers from Europe on local production facilities. This is salient locally, given the number of production companies located in the Birmingham area that deal with matters related to lighting, staging and tour management. The region has been home, for instance, to two major production companies – SSE Audio: West Midlands and Cloud One Group Ltd.[34] The short-term challenge is in replacing these workers. The longer-term opportunity resides in working locally with FE and HE providers to up-skill people in the region to replace them. Dialogue between the five universities in Birmingham, further education providers, and the West Midlands Music Board could prove fruitful. The recommendations for the Trade and Co-operation Agreement proposed by the All Party Parliamentary Group, alongside a longitudinal programme of identifying and addressing skills-gaps at local level, offer scope for minimising disruption, with the 2025 review of the Trade and Co-Operation Agreement providing an opportunity for dialogue between music stakeholders and government in the interim to identify the best means for reducing friction.

The immediate, and severe, effects of the Covid-19 pandemic have to some extent masked the longer-term, structural effects of Brexit – it is difficult to assess

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[31] Department for Transport (2022) 'Major boost for live music and touring industry specialist hauliers to move more freely between countries', 6 May.
https://www.gov.uk/government/news/major-boost-for-live-music-and-touring-industry-specialist-hauliers-to-move-more-freely-between-countries

[32] All Party Parliamentary Group on Music (2022*) APPG on Music report: Let the Music Move – A New Deal for Touring*. London: APPG Music/UK Music, p.6
https://www.ukmusic.org/wp-content/uploads/2022/07/APPG-on-Music_Let-the-Music-Move_A-New-Deal-For-Touring.pdf

[33] 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
https://publications.aston.ac.uk/id/eprint/43613/6/BLMP_report_1_.pdf

[34] 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, p.10
https://publications.aston.ac.uk/id/eprint/43613/6/BLMP_report_1_.pdf

the effect of departure from the EU on an activity (live music) that has been all but shuttered for nearly two years. And although the most immediate effect of Brexit is additional costs for touring acts, the longer-term possibilities are more open. Michael Kill, CEO of the Night-Time Industry Association, noted in interview that "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".[35] The responses by music-makers and their organisations to the pandemic (described below) demonstrate this scope to be innovative in response to challenges. Maximising the potential for this innovation will require attention by policymakers to the logistical pressures that bear upon musical practitioners. Given the detailed focus on this by representative bodies such as the Musicians' Union and UK Music, this is feasible. As the chair of the All Parliamentary Group on Music – Kevin Brennan MP – has put it:

> On touring it's time to leave aside the divisions and old arguments and focus on what's right for UK musicians and the UK music industry. Freshly focussed reciprocal engagement will also benefit our cultural partners and creative colleagues across Europe.[36]

Live music, then, is sensitive both nationally and locally, to wide-scale policy debates and developments. There is also a plethora of regulatory activities at local level that have a bearing on musical activities beyond what might be immediately considered. Development and planning are examples here.

The Town and Country Planning Act of 1947[37] as it related to property building stated that no property could be built without the agreement of the local authority in a city centre. A substantial change to the Act was announced in 2020 which saw those planning permissions revised,[38] 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'. Each individual application would now be considered in terms of 'zone-systems' of planning (zones for growth, protection, and renewal) with potential negative consequences for live music ecologies in city centres designated as 'growth zones'. Clarification was sought – and received – in Parliament that dialogue between the Departments for Digital, Culture, Media and Sport (DCMS) and Housing, Communities and Local Government meant that grassroots venues

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[35] Interview with authors, 18th September 2020.

[36] All Party Parliamentary Group on Music (2022*) APPG on Music report: Let the Music Move – A New Deal for Touring*. London: APPG Music/UK Music, p.5

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

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

would, indeed, be included within protection for 'cultural' characteristics of an area, and change of use not encouraged.[39] But the uncertainty over this, during the pandemic, and as part of the planning initiative dubbed "project speed",[40] was a source of anxiety for venues, and reminiscent of a previous extension to Permitted Development Rights that had allowed certain developments to take place without passing through the full planning system. This was deleterious to the operation of many music venues, which became subject to noise complaints from new residents in their neighbourhoods. A report by the Mayor of London's office, for instance, estimated that in the eight years to 2015, 35% of grassroots music venues had closed[41] while the Edinburgh Live Music Census of 2015 (run by the University of Edinburgh) found that 48% of venues were affected by "by noise, planning or development issues"[42] with the Bristol Live Music Census of the same year (run by Bucks New University) finding that 50% of the city's music venues were affected by development.[43] A nationwide exercise in 2017 (conducted by the Universities of Edinburgh, Newcastle and Turku) in 2017 showed that over a quarter (27%) of all music venues had been negatively affected by noise-related complaints in the previous 12 months with more than one in five (22%) negatively affected by issues with planning and property development over the same period. This figure rose to a third of respondents identifying as small music venues being negatively affected by planning and property development, with 29% of small music venues and 35% of pubs and bars affected by noise complaints.[44] Not all of these complaints would have been vexatious, or the direct result of development, but the historic rate of closures, and threats of closure, in London and elsewhere highlights the

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[39] UK Parliament (2020) 'Music Venues: Question for Department for Digital, Culture, Media and Sport. UIN 67562, tabled on 1 July 2020'.
https://questions-statements.parliament.uk/written-questions/detail/2020-07-01/67562

[40]Simpson, J. (2020) 'Johnson's Project Speed promises 'most radical planning reforms since World War II', *Inside Housing*, 30 June.
https://www.insidehousing.co.uk/news/news/johnsons-project-speed-promises-most-radical-planning-reforms-since-world-war-ii-67008

[41] Mayor of London's Music Taskforce (2015) *London's Grassroots Music Venues: Rescue Plan*. London: Greater London Authority, p.8
https://www.london.gov.uk/sites/default/files/londons_grassroots_music_venues_-_rescue_plan_-_october_20152.pdf

[42] Behr, A., Webster, E. and Brennan, M. (2015) *Edinburgh Live Music Census 2015: Pilot Study*. Edinburgh: Live Music Exchange/University of Edinburgh, p.19.
https://www.pure.ed.ac.uk/ws/portalfiles/portal/21602336/Edinburgh_Live_Music_Census_Report.pdf

[43] Moore, T. (2015) *Bristol Live Music Census Report*. Bucks: Bucks New University/UK Music, p.9, p.15.
https://www.ukmusic.org/wp-content/uploads/2022/06/Bristol_Live_Music_Report.pdf

[44] Webster, E., Brennan, M., Behr, A., Cloonan, M. and Ansell, J. (2018) *UK Live Music Census 2017 Report*, pp.58-59
http://uklivemusiccensus.org/wp-content/uploads/2018/03/UK-Live-Music-Census-2017-full-report.pdf

vulnerability of musical spaces within gentrification and regeneration processes.[45]

New housing and office developments being prioritised can put pressure on existing venues, which have been at the sharp end of urban development as new residents and increased population density bring the potential for more noise complaints.[46] This longstanding problem for venues was at the root of campaigning to introduce the Agent of Change Principle into planning frameworks, to protect existing building uses. The 'Agent of Change' puts the onus on a business or person responsible for any change in a locale for managing that change. Therefore a developer building next to an existing venue must make sure that any new accommodations are sufficiently soundproofed. (Conversely, if a venue is the 'newer' development, its operators shoulder the responsibility.) While this principle now sits on planning frameworks across the country, this is guidance rather than statute – implementation still rests with local authorities and the prospects for venues can be uneven amongst the countervailing pulls of licensing and planning priorities locally, and variation across councils.

The House of Lords Liaison Committee's 2022 follow-up report on the 2003 Licensing Act, for instance, described "knock on effects" from planning to licensing, and the need for "coordination between the licensing and planning systems" in the application of the Agent of Change.[47] Witnesses were clear that

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[45] Campanello, K., Dines, M., Dylan-Smith, G., Hunter, M. and Parkinson, T (2015) *Understanding Small Music Venues*. London: Music Venue Trust/Institute of Contemporary Music Performance, p.12, p,18, p.30
https://www.musicvenuetrust.com/wp-content/uploads/2015/03/music_venue_trust_Report_V5-1.pdf

[46] For an account of examples of these tensions in Leeds, Glasgow and Camden, see, for instance:
Behr, A., Brennan, M. and Cloonan, C. (2014) *The Cultural Value of Live Music From the Pub to the Stadium: Getting Beyond the Numbers*. University of Edinburgh/AHRC
https://www.pure.ed.ac.uk/ws/portalfiles/portal/16546029/The_Cultural_Value_of_Live_Music_From_Pub_to_Stadium.pdf
A discussion of the situation in the Midlands can be found in:
BOP Consulting (2019) *Midlands Music Research and Consultation*, 29 July.
https://www.artscouncil.org.uk/sites/default/files/download-file/Arts%20Council%20England%20-%20Music%20Midlands%20Final%20Report%20-%20BOP%20Consulting.pdf
For examples of pressures from gentrification in Liverpool, see:
Cohen, S. (2007), *Beyond the Beatles: Decline, Renewal and the City in Popular Music Culture*. Aldershot: Ashgate.
Other accounts include:
Tibbalds [Planning and Urban Design](2018) *The Impact of Noise and Development on Music Venues*, April 3.
https://tibbalds.co.uk/news/the-impact-of-noise-and-developments-on-music-venues

[47] House of Lords Liaison Committee (2022) *2nd Report of Session 2022–23 HL Paper 39 The Licensing Act 2003: post-legislative scrutiny Follow-up report*. London: House of Lords, pp.10-11.
https://committees.parliament.uk/publications/23014/documents/168608/default/

the implementation of the principle lacks clarity and consistency, exacerbating uncertainty over the long-term for venues. Michael Kill of the Night Time Industries Association recommended that Agent of Change be included in both planning and licensing legislation on the basis that it "in practice, is implemented on a very ad hoc patchwork basis across local authorities".[48] Sarah Clover, with a different remit as barrister and West Midlands Regional Chair of the Institute of Licensing, similarly, referred to "ad hoc organic solutions growing up in different authorities and authority areas".[49] She summarised:

> The nature of the problem… is the greater intensification of people coming into night-time economy areas to live. We see all sorts of vibrant city living advertised. People move in. Development needs to be controlled very carefully to mediate and harmonise the way people live in their new environment cheek by jowl with hospitality venues, to have co-ordination between licensing, planning, environmental protection and environmental health officers, and to have that discourse and discussion up front, so that these land use relationships can be controlled effectively from the get-go. That does not happen.[50]

The outcome of this for venues is uncertainty in the face of both developments, and noise complaints and, consequently, a reactive mode of operating wherein a great deal of energy is expended on campaigning for survival rather than developing the business. To give one example of many, the Flapper and Firkin, in Birmingham's city-centre, was spared demolition to make way for flats and re-opened in 2021, but only after a protracted public campaign put pressure on the Council.[51] The longer-term security of venues, especially those at the

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48 House of Lords Liaison Committee (2022) *Liaison Committee Corrected oral evidence: Licensing Act 2003—follow-up*. *Evidence Session* 2, 10 March. London: House of Lords, Q11. https://committees.parliament.uk/oralevidence/9926/html/

49 House of Lords Liaison Committee (2022) *Liaison Committee Corrected oral evidence: Licensing Act 2003—follow-up*. *Evidence Session 1*, 10 March. London House of Lords, Q.3 https://committees.parliament.uk/oralevidence/9925/html/

50 Ibid.

51 Bains, S. (2021), 'Iconic Birmingham music venue The Flapper will reopen this summer after being saved from demolition', *Birmingham Mail* 30 June.
https://www.birminghammail.co.uk/whats-on/whats-on-news/iconic-birmingham-music-venue-flapper-20934276
Other similar examples can be found in:
London: Blake, E. (2022) 'East End music pub backed by stars 'faces new threat from flats', *Evening Standard* 18 February.
https://www.standard.co.uk/news/london/the-george-tavern-shadwell-faces-closure-ongoing-development-row-b981762.html
Sheffield: ITV News (2022) 'Stars show support as legendary Sheffield music venue The Leadmill threatened with closure', *ITV News website* 1 April.
https://www.itv.com/news/calendar/2022-04-01/legendary-music-venue-could-be-forced-to-close
Lancashire: BBC News (2022) 'The Ferret: Threatened Preston venue given community asset

grassroots, is rarely certain. Part of the issue here is that these venues 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 often lead to contracts ending, or not being renewed by property owners. Further, venues can be still effectively erased to make way for new developments via Compulsory Purchase Orders. National issues around housing obviously necessitate new developments and, as Sarah Clover remarked to the House of Liaison Committee, "Different policies pull in different directions… local authorities are playing catch-up".[52] Tom Kiehl of UK Music described the effect of this to the 2018 DCMS Committee Inquiry into Live Music:

> All it takes is one or two neighbours or residents to put in a complaint, even about an existing venue let alone a new build or development, and that can then threaten the venue's licence.[53]

These authorities, then, need to remain sensitive to the existing *cultural* configuration of their localities and mindful of the interplay between licensing, planning and musical activity. With the DCMS Committee concluding that consistent nationwide application of Agent of Change is crucial,[54] and the House of Lords Liaison Committee recommending its incorporation into planning reforms within the Levelling-up and Regeneration Bill,[55] there is national level recognition of the need to minimise ambiguity in this area. Local authorities can begin to address the situation on the ground by close consultation with music representative bodies, and in the case of Birmingham the West Midlands Music Board could provide a productive space for this.

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status', *BBC News website*, 18 May.
https://www.bbc.co.uk/news/uk-england-lancashire-61487688

[52] House of Lords Liaison Committee (2022) *Liaison Committee Corrected oral evidence: Licensing Act 2003—follow-up*. *Evidence Session 1*, 10 March. London House of Lords, Q.4
https://committees.parliament.uk/oralevidence/9925/html/

[53] Digital, Culture, Media and Sport Committee (2018) Oral evidence: Live Music, HC 733. Q265.
https://publications.parliament.uk/pa/cm201719/cmselect/cmcumeds/733/733.pdf

[54] Digital, Culture, Media and Sport Committee (2019) *Live music: Ninth Report of Session 2017–19*. London: House of Commons, p.27
https://publications.parliament.uk/pa/cm201719/cmselect/cmcumeds/733/733.pdf

[55] House of Lords Liaison Committee (2022) *2nd Report of Session 2022–23 HL Paper 39 The Licensing Act 2003: post-legislative scrutiny Follow-up report*. London: House of Lords, p.37
https://committees.parliament.uk/publications/23014/documents/168608/default/

4. Covid-19

For live music businesses, and those who work in them, Covid-19 was obviously the source of an economic crisis. In this section, we highlight how the pandemic impacted various live music stakeholders at national, local and sub-local levels. While we identify a lot of issues resulting from the application of macro-policies on a micro scale (i.e. a top-down approach), we also see a number of creative solutions that helped sustain live music through the pandemic (i.e. a bottom-up approach).

i. Birmingham's Roadmap to live music - the tier system revisited (top-down approach)

Live music venues are an important element of the West Midlands economy and constitute an important node in a vast network of supply chains. During 2020 and various stages of lockdown, through the summer months, various roadmaps for reopening live music venues were considered. The closest to achieving fruition was a five-step roadmap published on 25th June 2020.[56] 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, subject to social distancing requirements.[57] Stage 3, in particular, changed the nature of the outdoor spaces linked to venues.

Utilising the data from the Birmingham Music Map and the impact of the Covid Guidelines around tiered easing of lockdown restrictions, we saw that moving from Stages 1-2 to Stage 3 meant that nearly half of venues in the city could feasibly have put on live gigs using their outdoor spaces. Yet roughly half of those were in need of changes to their licensing arrangements due to access and various noise regulations. Moreover, only some of those venues identified live music as part of their main business model (around 80% of venues with an outdoor space), further decreasing the chances of them putting live gigs on due to projected costs/benefits calculations. Preparing for the implementation

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[56] BBC (2020), 'Theatre and music figures say roadmap is 'meaningless' without support', *BBC News website*, 20 June.
https://www.bbc.co.uk/news/entertainment-arts-53182634,
[57] Gov.co.uk (version 10 May 2020) *Working safely during coronavirus (COVID-19). Guidance for performing arts*
https://web.archive.org/web/20200710082918/https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19/performing-arts

of Stages 4-5 (socially-distanced indoor shows), the estimated numbers of gig-goers that venues could welcome varied between 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 a 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[58] applied exclusively to professionals, leaving semi-professional and amateur artists subject to the Guidelines on meeting people outside their households,[59] meaning that the maximum size for an audience was often limited to around 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 approximately 98,000 suddenly dropped during the summer months of 2020 by around 75% (Stages 1-3). This had clear implications for ticket prices, the availability of events across the city, and indeed the economic viability of shows – interviewees confirmed that the average margin on a gig was obliterated by that sort of drop. Thus, while venues were permitted to open, they were unable to operate profitably.

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

By mid-Spring of 2020, it was clear that support would be needed to sustain venues through the pandemic. We look here at the introduction of the government's Cultural Recovery Fund (CRF),[60] a funding initiative on an unprecedented scale (it represented approximately 20% of the entire DCMS spend in 2016-17).[61]

The CRF opened for initial applications on 10th August 2020, followed by a second round on 21st August. The scheme offered financial support for cultural

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[58] Gov.co.uk (version 10 May 2020) *Working safely during coronavirus (COVID-19). Guidance for performing arts*, https://web.archive.org/web/20200710082918/https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19/performing-arts

[59] Gov.co.uk (version 11 June 2020) *Coronavirus (COVID-19): Meeting with others safely (social distancing). Information on social distancing*, https://web.archive.org/web/20200909194956/https://www.gov.uk/government/publications/coronavirus-covid-19-meeting-with-others-safely-social-distancing

[60] Gov.co.uk (5 July 2020) 'Culture Recovery Fund', https://www.gov.uk/government/groups/culture-recovery-board

[61] Gov.co.uk (2020) '£1.57 billion investment to protect Britain's world-class cultural, arts and heritage institutions', Press release, 5 July. https://www.gov.uk/government/news/157-billion-investment-to-protect-britains-world-class-cultural-arts-and-heritage-institutions

organizations that were "financially stable before Covid-19, but were at imminent risk of failure" (Arts Council 2020, CRF Key Information).[62] 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. Across the first three rounds, 48 Birmingham-based organisations received a total of £15 million (see Table 2), which constituted 3.68% of the total funds distributed.

Table 2: *Culture Recovery Fund Grants for Birmingham and West Midlands (no distinction on type of the venue)*

CRF Phase/Round	Birmingham	No. of organisations	% of total	West Midlands (value of grants)	No. of organisations	% of total grants
Round 1	**5,285,771**	**28**	**2.05**	**16,950,243**	**95**	**6.58**
Round 2	**1,004,332**	**16**	**1.31**	**5,954,645**	**54**	**7.77**
Round 3	**8,787,448**	**4**	**11.70**	**17,394,783**	**8**	**23.16**
Round 4	**15,077,541**	**48**	**3.68**	**40,299,671**	**157**	**9.85**

The funding awarded to organisations within the city limits was comparable to other cities with a similar profile. Liverpool-based organisations, for instance, received grants amounting to 2.46% of the total budget, with Manchester's organisations receiving 3.61%. All West Midlands-based organizations received 9.85% of the total funding. While that left it behind the London region (which received just over 33%), the distribution of funding appeared proportionate to other areas based on the size of geographic areas.

Some definitional issues arise in the disbursement of funds, and assessing them, that relate to the *definition* of nodes within a live music ecology. The focus of the Birmingham Live Music Project, and its mapping, employed a broad definition of a 'music venue' (see Appendix notes on methodology). The CRF criteria for funding, since they included a necessary emphasis on auditability, specified that organizations whose 'primary role is to create, present or support one (or more)' of a provided list of genres and sub genres could apply.[63]

This, then, points towards some aspects of a local cultural ecology that are hard to capture in a nationwide scheme, yet still provide employment and platforms for local operatives. Musical activity is – happily – hard to contain in pre-defined spaces and spills out across a region. 'Scenes' are notoriously hard to pin down. This is part of their strength and appeal, but also a challenge in terms of

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[62] Arts Council England (2021) *Culture Recovery Fund: Grants*, https://www.artscouncil.org.uk/funding/culture-recovery-fund-grants#section-1
[63] Arts Culture England (2021) *Culture Recovery Fund: Grants*, https://www.artscouncil.org.uk/funding/culture-recovery-fund-grants#section-4

identifying loci for support in the face of challenges like a pandemic. The matter of defining the various material and social points within a live music ecology does not always align neatly with the inevitable, and necessary, strictures of delivering government support and tracking its use. The large number of self-employed musicians, for example, or those whose primary source of income is non-musical, but who nevertheless contribute to the overall musical milieu, do not sit easily within the formal mechanisms of delivery. Pubs and cafes may feature music on a part-time basis, and serve as launch pads for emerging artists, and – indeed – performance spaces for more established artists, yet without a formal musical business model. The boundaries of musical 'scenes' are porous, and somewhat nebulous, yet they overlap with the more easily identifiable and quantifiable material points within a musical ecology (dedicated music venues, rehearsal rooms, music shops, promotion companies, etc). There are spaces – and informal or part-time businesses – whose place within the 'music industry' in formal terms is difficult to pin down, but which nevertheless make an important contribution to the overall health of a local music ecology. Capturing this contribution from a national vantage point is hard, however, and local mapping exercises with a ground level focus can reveal elements of an *overarching* ecology that a more top-down exercise may not be able to account for without substantial deployment of resources (which, of course, are limited). Local and national perceptions of the make-up of an ecology may, then, vary.

Despite the practical difficulties in reconciling the CRF and BLMP data and definitions of venues, an analysis across the first three CRF funding rounds indicated that the balance of funding in the city (more than 79% of funds) went in this instance extensively – though perhaps inevitably, given the emergency timeframe – to organisations with an existing track record of securing Arts Council England funding pre-Covid. A much smaller proportion of funding landed in the hands of places traditionally more closely linked with live music gigs, such as small (3) and mid-sized (1) venues. There is a disparity between the amounts granted to organizations which are dedicated to music as their main business and those with a broader focus. Across 48 organisations that received the CRF in Birmingham, only a few were venues or organisations with a dedicated and primary focus on live music. Out of 195 live music venues active on the scene in the Birmingham 'B'-postcode area before the 2020 Covid-19 lockdowns, only an estimated 10% had received funding in the scheme.

Broader questions pertain, also, about the extent to which the money disbursed by the CRF *remained* in the music sector, particularly given the preponderance of venue operators that rent their space. The Music Venue Trust, for instance, notes that 93% of its membership of grassroots venues are those where the operators are tenants, with an average of 18 months left on their tenancy.[64] Once again, we can see the difference between – but co-dependence of – material concerns and socio-cultural networks within the live music ecology. In this case, the problem for grassroots venues – as outlined by Mark Davyd, CEO of the Music Venue Trust – is precarity and the added challenges this produces for long-term business planning. In CRF terms, Davyd describes 67% of aid being paid to the landlords who own the building freeholds, rather than the venue *operators* whose work supports live music and whose tenancy in those buildings is not assured.[65] For the Music Venue Trust, ownership of the infrastructure for grassroots venues is key to mitigating precarity for business, and their launch of a Charitable Community Benefit Society (CCBS) – Music Venue Properties (MVP) – to purchase the freehold of grassroots venues is their means of seeking to secure the long-term status of those buildings *as* music venues.[66]

The CRF grants, though, 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, nevertheless, observe how this process 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 pointed 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. The venues and participants themselves also need to make themselves known. 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. Again, the work of representative bodies (such as the Music Venue Trust) and locally based forums to build bridges between music businesses and

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[64] Music Venue Trust (2022) 'Grassroots music venues: Recovering from the pandemic and building back better', written evidence to DCMS Inquiry 'Reimagining where we live: cultural placemaking and the levelling up agenda', London: DCMS Committee/UK Parliament, p.3 https://committees.parliament.uk/writtenevidence/106304/pdf/

[65] Paine, A. (2022) 'Music Venue Trust launches #ownourvenues initiative with nine venues targeted for pilot project', *Music Week* 22 May. https://www.musicweek.com/live/read/music-venue-trust-launches-ownourvenues-initiative-with-nine-venues-targeted-for-pilot-project/085866

[66] Music Venue Trust (2022) 'Grassroots music venues: Recovering from the pandemic and building back better', written evidence to DCMS Inquiry 'Reimagining where we live: cultural placemaking and the levelling up agenda', London: DCMS Committee/UK Parliament. https://committees.parliament.uk/writtenevidence/106304/pdf/

policymakers (such as the West Midlands Music Board) are useful means by which to identify and help suitable targets for support while communicating with relevant bodies for its accountable delivery and use.

iii. ***Development and engagement of stakeholders (middle ground) and creative live music responses (bottom-up approach)***

Our research identified the emergence of new support networks as part of attempts to mitigate the worst effects of the pandemic. Moreover, there were visible efforts to create a spirit of solidarity amongst venues, musicians and their audiences. The spring and summer months of 2020 saw a great deal of lobbying and campaigning activity around requesting support for the arts generally and live music in particular. Examples here include online and social media campaigns around hashtags such as #SaveTheArts, #LetTheMusicPlay, #RedAlert, #WeMakeEvents, #MakeMusicWork, and #SaveOurVenues. Those were widely supported by users on social networks who shared posts with these hashtags, and by the establishment of online groups that aimed to show solidarity with industry workers stuck at home, such as Musicians Support[67] and UK Amateur Touring Crew.

While the emergence of online, self-selecting solidarity groups was a welcome indicator of determination and perhaps resilience, its concrete effect is hard to quantify. Perhaps more signficant was the number of major bodies and industry organisations that engaged in productive dialogue to help shape the government response to Covid-19. Organisations such as the Musicians' Union, Music Venue Trust (MVT), the Night Time Industry Association (NTIA), UK Music and National Exit Strategy Advice & Response Team (NEXSTART)[68] 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 the CRF funding for those venues who made use of MVT guidance when building their applications.[69] 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. The pandemic also saw the emergence of a new organisation LIVE (Live music Industry Venues & Entertainment), a federation of fourteen live music associations representing a broad spectrum of activity

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[67] https://www.facebook.com/groups/246061543073370/
[68] A coalition of experts formed to work on lockdown exit strategy for the licensed trade.
[69] Henley, J. (2020) 'Music Venue Trust confirms 89% success rate for Culture Recovery Fund applications' *Music Week* 19 October.
https://www.musicweek.com/live/read/music-venue-trust-confirms-89-success-rate-for-culture-recovery-fund-applications/081588

including grassroots venues, festivals, promoters, music managers, concert halls, arenas, production services and orchestras.[70] This was a useful initiative in collating the perspectives of a variety of stakeholders and communicating them to government, as well as disseminating best practice in terms of Covid mitigations.[71] 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.

At grassroots levels, artists and cancelled festivals started bringing fans together via online platforms. The response to Covid-19 also brought examples of direct-to-fan engagement by individual artists, bands and venues, with physical, in-place interaction replaced by the live streaming on Instagram. Online engagement spread further still, with artists establishing an 'access-all-areas'-style online presence through online meet-and-greet pages such as Looped and Chatalyze, with some charging a fee. Venues updated their benefactors through online posts on Facebook and Instagram, including messages from staff encouraging their followers to 'stay safe'and 'be kind', as they kindled hopes for a reopening in near future.[72] During the initial stages of lockdown, some venues also offered the offline delivery of various products, or else engaged in crowdfunding campaigns and the sale of venue-branded merchandise. 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 (Workshop organised by Liverpool City Region Music Board, Oct 2020).

As the pandemic unfolded, the music industries, and musicians, adapted. Many stakeholders accepted that the pandemic could have long-term, transformative implications. The immediate impact of Covid-19 was the loss of an income for live events in 2020, but it seems clear that long-term responses

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[70] LIVE's membership consists of: The Association of British Orchestras, Association of Independent Festivals, Association for Electronic Music, Association of Festival Organisers, Association of Independent Promoters, British Association of Concert Halls, Concert Promoters Association, Entertainment Agents' Association, Featured Artists Coalition, Music Venue Trust, Music Managers Forum, National Arenas Association, Production Services Association, Society of Ticket Agents and Retailers.

[71] For example:
LIVE (2021) *Covid-19 Mitigations – Recommended Industry Practice*.
https://69b459a1413e40d20dd5.b-cdn.net/wp-content/uploads/2021/11/Covid-19-Mitigations-Recommended-Industry-Practice-1.pdf

[72] Draganova, A., Hogan, B. and Rozbicka, P. (2020), 'It is not all about the toilet paper, culture matters: Creative live music responses to the Covid-19 lockdown', *Birmingham Centre for Media and Cultural Research website*, 10 July.
https://bcmcr.org/research/it-is-not-all-about-the-toilet-paper-culture-matters-creative-live-music-responses-to-the-covid-19-lockdown/

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. Given that *communicating* the needs of a variety of different venue and business types (from grassroots venues and independent bands to orchestras and concert halls) is an important part of the equation, the formation of LIVE as a cross-sectoral body to represent this range of interests is a potenially useful development. It can serve as a forum for the multiplicitous elements of live music making, and a channel between them and policymakers. Likewise the activity of its component members in producing practical guidance on responding to policy for time-poor business operators at local level remains key to the health of live music ecologies. 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.

5. Conclusions

The UK's music and music businesses have been described as its "calling card" (Tom Kiehl, UK Music, interview 20 Oct 2020). As the discussion above demonstrates, they are facing a number of challenges that must be addressed to maintain support. This is partly a matter of dealing with longstanding debates 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 Streaming demonstrated.[73] Other challenges that bear directly upon live music are subject to the developing situation around Brexit. Action, for instance, to facilitate touring activities by British musicians (and their European counterparts) depends on a national government at Westminster that does not always prioritise the long-term effects on local, smaller-scale cultural operators in that aspect of its policies. 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.

A vital aspect of any city's live music ecology are its grassroots music venues and we therefore recommend that local authorities recognise explicitly within their policies the economic, social and cultural value of live music and live music venues to the region; that planning, liquor licensing, environmental, health, culture and city regeneration strategies take greater account of the actual and *potential* contribution of live music than has sometimes historically been the case. It would be desirable for the effect on musical activity to be factored into development discussions before public demonstrations and campaigns like that surrounding the Flapper and Firkin become necessary.[74] One way of doing this would be an across-policy approach, further enhanced by a live music impact assessment. The impact assessment should implement an understanding of the live music ecosystem as part of a broader night-time economy (including the vast network of venues; supply chains and gig-goers' spend around the venues), leading to the development of a Night Time Industry Impact Assessment that

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[73] Digital, Culture, Media and Sport Committee (2021) *Economics of music streaming: Second Report of Session 2021–22*
https://committees.parliament.uk/publications/6739/documents/72525/default/
[74] Bains, S. (2021) 'Iconic Birmingham music venue The Flapper will reopen this summer after being saved from demolition', *Birmingham Mail* 30 June.
https://www.birminghammail.co.uk/whats-on/whats-on-news/iconic-birmingham-music-venue-flapper-20934276
(See notes on p.20 for comparable examples elsewhere)

would be applicable to any new policies/strategies and planning decisions taken at the local and regional level. To this end, the launch of the West Midlands Music Board (WMMB) by sectoral support body Culture Central is an opportunity for progress. The Music Board could provide a useful point of contact for the local council in framing its policies and identifying potential impacts on the city's musical ecology early on.

Additionally, while dedicated music venues are the key to live music provision there is not always a clear demarcation of the borders of the live music ecology either across different levels of economic activity or, in some cases, genre boundaries. The fringes feed the centre and those spaces that include live music, even if not as part of their core business model, offer additional resource to the cultural fabric of the city. Local authorities need to recognise pubs and bars as potential sites of both artist and audience development, and not only as community building assets but also cultural ones. That means consideration of the hosting of live music events as a positive factor in license applications – a cultural contribution, additional to questions of sound leakage and volume.

There is also a need for the creation of information hubs to support local venues of all kinds, and audiences, on the road to the recovery. A good example here could be initiatives undertaken by the Liverpool City Region, including the Music Fund, in support of the Liverpool City Region Music Board (an independent, sector led board). Again, the West Midlands Music Board could serve as a forum for intra-sectoral communication across the different musical stakeholders (e.g. promoters, venues, musicians) and – informed by the work of national organisations such as LIVE, the Musicians' Union and Music Venue Trust – a channel of communication between the collective voice of the sector and the local authority.

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

In sum, what we have hoped to illustrate here is that live music ecologies – in Birmingham and elsewhere – involve relationships than cannot be easily delineated by lines on a map. The musical ecology of a city encompasses the blurred boundaries between amateur and professional, between commercial and publicly oriented initiatives and, indeed, between the musical and the non-musical. It is in these blurred boundaries and complex relationships that key challenges – but also opportunities – arise for practitioners and policymakers alike. It becomes necessary to recognise the linkages between matters like property ownership and how these feed into cultural activity. A healthy live music ecology needs to take account of factors like planning and development, the spread of venues in different neighbourhoods – as well as within the city as a whole – and the effect of national policy on local production facilities. There remain a number of immediate and long-term challenges for live music as it emerges from the pandemic: adjusting to a musical landscape of which livestreaming is now a significant component and the difficulty in monetising this for artists without a large following[75]; hesitancy on the part of audiences to return to venues (with mid-size venues down 45% on pre-pandemic attendance, and grassroots venues down 32% according to Opinium research);[76] negotiating a backlog of shows postponed during lockdowns and the consequent saturation of a market (for depleted audiences) as touring opens up again.[77] Additionally, of course, musicians and music venues are subject to the same pressures as other businesses – and members of society – from rising energy costs and broader inflation.[78] Addressing these challenges requires thinking strategically about how to foster communication between practitioners at the grassroots, national operators, representative bodies at national level and local authorities. It is our hope that the mapping described here can demonstrate the range of stakeholders *throughout* local live music and, in conjunction with the emergence of regional music boards as points of contact, facilitate an approach that recognises the effect on music-making of policymaking across its spectrum of activity.

The research described here 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, representative 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.

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[75] Haferkorn, J., Kavanagh, B., Leak, S. (2021) *Livestreaming Music in the UK: A Report for Musicians*. Sheffield Performer and Audience Research Centre/Musicians' Union/Music Venue Trust/Incorporated Society of Musicians/ESRC.
https://livestreamingmusic.uk/wp-content/uploads/2021/05/Livestreaming-Music-in-the-UK.pdf
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[77] Cooke. C. (2022) 'UK Music stats show partial recovery for music sector in 2021, but more government support needed' *Complete Music Update* 22 September.
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[78] UK Music (2022) *This Is Music 2022*. London: UK Music, p.6
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Appendix: Methodological Notes

This discussion is informed by a series of activities supported by the Policy and Evidence Centre as part of the project “The UK Live Music Industry in a Post-2019 Era: A Globalised Local Perspective”, whilst also building on longitudinal work examining the UK’s live music sector. As outlined below, the project activities included a series of panel discussions (September–October 2020 and January 2021), surveys (August–November 2020), stakeholder interviews that took place over the course of the project, and the creation of a ‘music map’ of the city which included crowd-sourcing information about venues.

Panel discussions and interviews

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. In September 2020, we organized a panel entitled ‘West Midlands and the (international) business of Creative Culture’, 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 in October 2020 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. 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 participants for these events varied between 40 and 80.

We also participated as observers in a number of stakeholders' consultations organised by various organisations, which focussed on the emergence of Covid-19 and its related threats to the live music industry. These included: NEXSTART (a coalition of experts from the licensed hospitality and entertainment industries), the Creative Culture West Midlands Response Unit, and the West Midlands Music Recovery Roundtable.

The stakeholder networks we engaged with overall comprised of representatives of industry (venues, musicians, festival organizers, production companies and promoters; 25%), industry associations (20%), research and education (28%), local, regional and national government (12%), consulting companies (5%), barristers (legal experts; 3%), and others (3%). The follow-up interviews (18) provided more nuanced feedback on stakeholders' contributions to the panels.

City mapping

A core aspect of the project was the creation of an interactive map of music venues in locations with a B-prefix postcode. For the purpose of this 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. For 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) 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 gathered information on Birmingham music venues from the Songkick database. 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, 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, 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. 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 the coding language ‘R’ and deployed as a ‘Shiny’ application. When the map launched on Monday 1st June 2020, the project entered a third phase, focused on crowdsourcing data. 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 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 not exhaustive, this nevertheless represents the most comprehensive mapping exercise of spaces for live music in the city to date, and as such provides a useful snapshot of key physical nodes in Birmingham’s live ecology.

Surveys

Finally, the methods above were complemented by two surveys designed to gather a broader perspective on a number of issues. Initially intended as part of an ‘in person’ snapshot of live music activity in venues across the city, this component of the research – in particular – was significantly disrupted by the pandemic and venue closures. Our original plan to survey venues in person was reconfigured at short notice toward online delivery – at a time when venues were largely inactive – both of which necessarily impacted on response rate. The surveys, conducted online, were promoted via the project’s social media channels and website. 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. We received 93 and 60 responses respectively. While our survey sample represents a specific, actively concerned set of respondents amongst musicians and self-selecting gig-goers, rather than allowing us to draw firm conclusions about the city as a whole, it does provide useful context that informed our qualitative discussions and interviews. 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.

Disclaimer

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